NetCommunity & Raiser's Edge Integration Guide

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The Raiser's Edge NetCommunity Page

Information entered by website users downloads as transactions on the NetCommunity page in The Raiser's Edge. On the NetCommunity page, you approve or reject transactions. Approved transactions process website user information to records in The Raiser's Edge.

With Blackbaud NetCommunity, additional fields appear in The Raiser's Edge Export. The fields are located in the **Blackbaud NetCommunity Page Stats** node. You can use these fields to export information about your website from The Raiser's Edge. If you have *Advanced Reporting*, you can run more detailed reports to analyze and improve your website and solicitations. For more information about how to view website statistics, see the *Parts Guide*.

NetCommunity Options in The Raiser's Edge

In The Raiser's Edge, the NetCommunity page contains an Options section for various transaction types. Before you download transactions from Blackbaud NetCommunity to The Raiser's Edge, you should establish transaction options for the Blackbaud NetCommunity web service, currencies, class note processing, new constituents, linked user email, matching gift, transaction assignments, and advocacy information.

To access these options in The Raiser's Edge, click **NetCommunity** on the Raiser's Edge bar. The NetCommunity page appears. From the top right corner of the page, click **Options**. The NetCommunity Options screen appears.

Note: If the NetCommunity server was recently rebooted, or if the web.config file was recently modified, it may take a moment for the NetCommunity page to appear in The Raiser's Edge.

On the NetCommunity Options screen, you can establish and configure many options for the integration between The Raiser's Edge and Blackbaud NetCommunity.

Warning: For security reasons, when a Raiser's Edge user accesses transactions on the NetCommunity page, you cannot make changes to **Options**. If you attempt to open **Options**, a screen appears notifying you that users are in transactions. You cannot change options until all users exit transactions.

In addition, if a user in The Raiser's Edge is editing options, other users can only access **Options** in read-only mode. When **Options** are read only, the **OK** and **Cancel** buttons are not available.

Connection Settings

To establish the location of your Blackbaud NetCommunity web service, use **Connection Settings**. The Raiser's Edge uses the web service to download transactions from Blackbaud NetCommunity.

> **Establish options for the connection settings**

1. On the NetCommunity Options screen, select **Connection Settings** from the tree view on the left. On the right, the options for connection settings appear.

2. In the **URL** field, enter the URL for your Blackbaud NetCommunity web service. Typically, the format of the URL is http://yourdomainname/PluginService/MasterService.asmx.

Note: The IT Administrator at your organization can recommend the appropriate URL based on your system configuration. Other URL formats include http://yourmachinename/PluginService/MasterService.asmx and http://yourIPaddress/PluginService/MasterService.asmx. If Blackbaud hosts your website, the URL format is either http://<your blackbaud siteid>.bbnc.bbcust.com/PluginService/MasterService.asmx or http://<your blackbaud siteid>.plugin.bbcust.com/PluginService/MasterService.asmx.

3. To test the connection between The Raiser's Edge and Blackbaud NetCommunity, click **Test Connection**.

Tip: For better processing, you can also test the connection from the web server and the user machines.

- If a connection exists, a successful connection message appears.

- If the connection is unsuccessful, make sure you entered the correct URL. To verify the URL, you can copy the URL entered in the **URL** field and paste it into a web browser.

4. To enable multiple users to process transactions for Memberships and Advocacy Actions at the same time, in the **Maximum** field, enter the maximum number of transactions to appear on a transactions screen for each user. The default is 250, but you can increase or decrease the number.

Tip: The number in the **Maximum** field applies to all transaction types. However, because you can check out transactions for Sign-up Requests, Profile Updates, Donations, Volunteer Requests, and Event Registrations, these transaction types automatically allow for multiple users to process transactions at the same time.

You can also limit the number of transactions on a screen by enabling transaction assignments. For more information, see .

5. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Currency Configuration

To establish the countries and currencies to use with transactions from Blackbaud NetCommunity, use **Currency Configuration**.

> **Establish options for the currency configuration**

1. On the NetCommunity Options screen, select **Currency Configuration** from the tree view on the left. On the right, the options for currencies appear.

2. For each **Currency**, select a corresponding **Country**.

Note: The exchange rates for currencies are stored in *Configuration* in The Raiser's Edge. For more information about exchange rates in *Configuration*, see the *Configuration & Security Guide* for The Raiser's Edge.

3. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Class Note Processing

To establish how to manage information entered by website users through the Class Notes part on your website, use **Class Note Processing**.

> **Establish options for class note processing**

1. On the NetCommunity Options screen, select **Class Note Processing** from the tree view on the left. On the right, the options for class notes appear.

2. To enable class note updating, select **Enable class note update processing**. When you select this checkbox, data that website users enter through a Class Notes part on your website download to a Notepad in The Raiser's Edge.

3. In the **Notepad Type** field, select the type of note to store the data from the Class Notes part. For example, when you select "Biographical," class notes data downloads to the Notes tab on a constituent record.

4. To create a Notepad for each class notes update, select **Create a new notepad for every change**.

5. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

New Constituents

To establish the constituent code to assign to new constituents from Blackbaud NetCommunity, use **New Constituents**. For more information about constituent codes in Blackbaud NetCommunity, see the *Program Basics Guide*.

In **New Constituents**, you can also create or select an existing Raiser's Edge default set of values for new records. When you load a default set into a record, the values you entered for the set can

automatically default into the fields on the record. For example, if most of your constituents are from the same city and state, you can create an "Address" default set with entries in the applicable address fields.

> **Establish options for new constituents**

1. On the NetCommunity Options screen, select **New Constituents** from the tree view on the left. On the right, the options for sign-up information appear.

2. In the **Constituent Code applied for all new constituents** field, select a constituent code to assign to any downloaded constituent not already in your database in The Raiser's Edge.

Note: This constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

3. In the **Default Set applied to all new individuals** field, select a default set of values for new individual records.

   To create a default set for new individual records from Blackbaud NetCommunity, click the **Add New** link. The New Default Set screen appears so you can select values for the individual record default set.

Note: For information about Raiser's Edge default sets, see The Raiser's Edge *Program Basics Guide*.

4. In the **Default Set applied to all new organizations** field, select a default set of values for new organization records.

   To create a default set for new organization records from Blackbaud NetCommunity, click the **Add New** link. The New Default Set screen appears so you can select values for the organization record default set.

5. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Addresses

To establish a default address info source for all new and updated addresses from Blackbaud NetCommunity, use **Addressses**. For more information about address info sources, see The Raiser's Edge *Constituents Guide*. select an option, such as Website, in the **Address info source** field.

> **Establish options for addresses**

1. On the NetCommunity Options screen, select **Addresses** from the tree view on the left. On the right, the option for address source appears.

2. In the **Address info source** field, select a source, such as Website, to default for all new and updated addresses from the website.

   After you process transactions, the source defaults to the **Info source** field for the address on the Biographical tab in The Raiser's Edge.For more information about address info sources, see The Raiser's Edge *Constituents Guide*

3. To save your option and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Matching Gifts

To establish how to manage matching gift information from Blackbaud NetCommunity, use **Matching Gifts**.

> **Establish options for matching gifts**

1. On the NetCommunity Options screen, select **Matching Gifts** from the tree view on the left. On the right, the options for matching gift information appear.

2. In the **Constituent Code** field, select a constituent code to assign to any new organization not already in your database in The Raiser's Edge. For more information about selecting constituent codes in Blackbaud NetCommunity, see the *Program Basics Guide*.

3. In the **Relationship Code** field, select a relationship code to assign to any new organization not already in your database in The Raiser's Edge. The relationship code defines the nature of the association the organization has to the constituent (typically, the donor). For example, assign the code Employer for matching gift companies.

4. To automatically create matching gift pledges for companies with a relationship to a donor, select **Constituent business relationships**.

Tip: In addition, the **[Organization constituent] matches gifts from [individual constituent]** checkbox on the General 2 tab on the relationship record must also be selected in The Raiser's Edge to automatically create a matching gift pledge. For more information, see The Raiser's Edge *Constituent Data Entry Guide*.

5. To automatically create matching gift pledges for companies with a relationship to a donor's spouse, select **Spouse's business relationships**.

6. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Linked User Email

To select a Blackbaud NetCommunity email template for which NetCommunity Users is selected in the **Data Source** field, use **Linked User Email**. When you establish this option, the **Send Linked User Email** button enables on the Sign-up Requests Transactions screen when the website user is auto-matched to a record in The Raiser's Edge that is linked to a Blackbaud NetCommunity user. To send a user an email from the Sign-up Requests Transactions screen, you can click **Send Linked User Email**.

> **Establish options for linked user email**

1. On the NetCommunity Options screen, select **Linked User Email** from the tree view on the left. On the right, the option for a linked email template appears.

2. In the **Email Template** field, select the email template specified for NetCommunity Users. This must be an email template with NetCommunity Users selected in the **Data Source** field. For more information about email templates, see the *Email Guide*.

3. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Constituent Matching

The **Constituent Matching** option determines the automatic search method to download sign-up requests, donations, event registrations, membership, and advocacies. You can select to search by exact match or for records in The Raiser's Edge that are marked inactive or deceased.

> **Establish options for constituent matching**

1. On the NetCommunity Options screen, select **Constituent Matching** from the tree view on the left. On the right, the options for assigning NetCommunity page user rights appears.

2. Select the checkbox beside each field to search by. For example, to search by last name and nickname, select **Last name** and **Nickname**.

3. To search by exact criteria, select **Exact Match**. For example, if you select this checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

4. To include inactive constituents in The Raiser's Edge in your search, select **Include Inactive**.

5. To include deceased constituents in The Raiser's Edge in your search, select **Include Deceased**.

6. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Transaction Assignments

To establish filters and security for new transactions as they default in the download grid, use **Transaction Assignments**. Assignments are established by selecting a security group in The Raiser's Edge, a filter type, and criteria in a series of steps for a transaction type. You can select to enable or disable the assignments for the current downloads

Note: You can apply **Transaction Assignments** to Sign-up Requests, Profile Updates, Donations, Volunteer Requests, Event Registration, Membership, and Advocacy Action transaction types. A keys graphic appears on the NetCommunity page for transaction types with transaction assignments.

> **Establish options for transaction assignments**

1. On the NetCommunity Options screen, select **Transaction Assignments** from the tree view on the left. On the right, the options for assigning NetCommunity page user rights appears.

2. In the **Transaction Type to manage** field, select the type of download transaction to assign filters and security for. For example, select Profile Updates or Donations.

3. To enable assignments for current downloads, select **Enable Assignments**. If you do not want to assign filters and security for the transaction, do not select this checkbox.

4. On the Assignment Filters tab, in the **Security Group** field, select the security group in The Raiser's Edge to apply to the transaction type. For example, you can select your revenue data entry group for Donations.

To enable options on this tab, you must select **Enable Assignments**.

a. In the **Filter Type** field, select a filter to limit transactions. For example, select Donor Last name Starts With.

Note: Options in the **Filter Type** field vary depending on the transaction type you select in the **Transaction Type to manage** field. For example, the filter options for Donations are Fund, Payment Method, or Donor Last name Starts With. The filter option for Sign-up Requests is Donor Last name Starts With.

b. In the **Criteria** box, select specific criteria to filter transactions by based on your selection in the **Filter Type** field. For example, if, in the **Filter Type** field, you select Donor Last name Starts With, A through Z appears in the Criteria box. If you select Fund for an applicable transaction type, your funds in The Raiser's Edge appear in the box.

Note: To select multiple criteria in this box, press **SHIFT** or **CTRL** on your keyboard. With the key pressed, click the additional criteria you need with your mouse.

c. After you complete **Steps 1 — 3**, click **Add**. The filter you created appears in the grid at the bottom.

To remove individual filters, click **Remove**. To remove all filters for the transaction type, click **Clear All Filters**.

5. To manage transactions that are not assigned, select the Transaction Properties tab.

Note: Options on the Transaction Properties tab apply to the transaction type you selected in the **Transaction Type to manage** field.

a. In the **Specify the security group...** field, select the security group in The Raiser's Edge that has rights to process these transactions regardless of assignment filters.

b. In the **Specify the behavior...** field, to default unassigned transactions to its own tab, select **Show unassigned transaction tab** for Raiser's Edge users not in the security group you select. When you select this checkbox, the **Make transactions read-only** checkbox enables. To default unassigned transactions to a read-only tab, select this checkbox.

6. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Advocacy

If you use Blackbaud NetAdvocacy, to establish how to manage advocacy information from Blackbaud NetCommunity, use **Advocacy**.

> **Establish options for advocacy information**

1. If you use Blackbaud NetAdvocacy, on the NetCommunity Options screen, select **Advocacy** from the tree view on the left. On the right, the options for advocacy information appears.

2. In the **Constituent Code** field, select a constituent code to assign to any downloaded constituent not already in your database in The Raiser's Edge. For more information about constituent codes in Blackbaud NetCommunity, see the *Program Basics Guide*.

3. To save your options and return to the NetCommunity page in The Raiser's Edge, click **OK**.

Relationships

To establish how to manage relationship from Blackbaud NetCommunity, use **Relationships**.

> **Establish options for relationships**

1. On the NetCommunity Options screen, select **Relationships** from the tree view on the left. On the right, the options for relationships appear.

2. In the **Organization contact type for event registrants** field, select a contact type to associate with the person who pays for an organization registration on the Event Registration Form.

Note: The types that appear in this field integrate from the contact types table in The Raiser's Edge.

3. Under **Education Relationship matching fields**, select the fields to match education data for Sign-Up Request and Profile Update transactions. When these fields match education data a user submits on your website with data on an education record, the program identifies the records so you can determine how to process them. For example, select the **School Name** and **Class of** fields to match alumni who register on your website with their education record in The Raiser's Edge.

Note: The program updates the values for fields you do not select in the **Relationships** option when you process transactions. For example, if you only select to match values for **School Name** and the user enters a new **Class of** value, the program overwrites the previous **Class of** value when you process the transaction. To retain a previous value, select **Create New** and add a new record.

4. To save your option and return to the NetCommunity page in The Raiser's Edge, click **OK**.

NetCommunity Transactions Overview

The NetCommunity page in The Raiser's Edge contains multiple sections for various transaction types. To access the page in The Raiser's Edge, click **NetCommunity** on the Raiser's Edge bar. The NetCommunity page appears. If the NetCommunity server was recently rebooted or the web.config file was recently modified, it may take a moment for the page to appear.

Note: To include the NetCommunity page in The Raiser's Edge, you must install certain NetCommunity files on the workstation. After you install the files, you must grant rights in The Raiser's Edge for the user to access the NetCommunity page. For more information about installing the files, see the *Blackbaud NetCommunity Installation Guide*. For more information about granting rights in The Raiser's Edge for the NetCommunity page, see the *Blackbaud NetCommunity & The Raiser's Edge Integration Guide*.

A **View** field exists on the NetCommunity page in The Raiser's Edge. In this field, you can select to view All Transaction Categories, Unaccepted Transactions Only, or Unaccepted Transactions with Counts. If you select Unaccepted Transactions with Counts, a status appears for the download that informs you how many new transactions exist.

An **Options** link also exists on the Netcommunity page in The Raiser's Edge. Before you process data from Blackbaud NetCommunity to The Raiser's Edge, you should establish options for transactions. For more information, see NetCommunity Options in The Raiser's Edge on page 8.

Warning: If a Raiser's Edge user is in **Options** on the NetCommunity page, you cannot access the rest of the page until the user exits **Options**.

Required Fields in The Raiser's Edge

In certain situations, required fields in The Raiser's Edge are considered when downloading transactions from Blackbaud NetCommunity. Other times, they are not considered. Be aware of these situations.

- When you process transactions for sign-ups, donations, volunteer requests, and event registrations in bulk by selecting **Select All**, required fields are not considered. A new constituent record is created without required data.

Note: This example assumes you did not select **Bypass required fields** on the Options tab on a bulk process screen.

For example, The Raiser's Edge requires that all constituent records contain the attribute "Retirement Date" with the corresponding date. Bill Smith makes a donation on your website and does not include his retirement date information. When you download donations, a constituent record for Bill Smith is created in The Raiser's Edge.

- When you link or create records for sign-ups, profile updates, donations, volunteer requests, event registrations, memberships, and advocacies, a record is first linked or created using the first name (if available), last name, email address, and constituent code. After you search for a constituent record in the database and click **Link Constituent** (for existing records) or **Create New** (to create a record), the transaction refreshes. From this point, required fields in The Raiser's Edge apply when you download transactions.

For example, The Raiser's Edge requires constituent records contain the attribute "Retirement Date" with the corresponding date. Bill Smith makes a donation on your website and does not include his retirement date. When you open a transaction and search for a record in the database, required fields are not considered when you click **Link Constituent** or **Create New**. After this step is complete, required fields in The Raiser's Edge apply when you process the transaction to The Raiser's Edge. Because Bill did not enter the information on your site, you can open his constituent record and manually add the Retirement Date attribute.

Process Order for Transaction Types

You should process transactions in the following order.

1. Sign-Up Requests	7. Event Registrations
2. Profile Updates	8. Class Notes
3. Fundraisers	9. Polls
4. Personal Pages	10. Memberships
5. Donations	11. Surveys
6. Volunteer Requests	12. Advocacy Actions

Certain transaction types require a process order for downloading new users. For example, you cannot process volunteer information for a new user in the Volunteer Requests download. First, you must process the new user in Sign-up Requests. For details about transaction process order, review the information in this section.

Fundraisers

You must process Fundraiser transactions in the following order.

Warning: If you do not follow this process order, you risk a negative impact to your fundraiser numbers, reports, and user experience.

- If the participant is a new user, process the transaction for the user in Sign-up Requests.

- If the user made a donation, process the Fundraiser transaction before you process the Donation transaction. Additionally, if the user submits an event registration, process the Fundraiser transaction before you process the Event Registration transaction.

  Donation and Event Registration transactions do not appear in the download until Sign-up Requests and Fundraiser transactions are processed.

Personal Pages

When you process personal page transactions, if the page owner is a new user, you must first process the transaction for the user in Sign-Up Requests. Personal Page transactions do not appear in the download until Sign-Up Request transactions are processed.

Volunteer Requests

You must process Volunteer Request transactions in the following order.

- If the volunteer is a new user, process the transaction for the user in Sign-Up Requests.

- If the volunteer is an existing user and a Profile Update transaction exists for the volunteer, process the Profile Update transaction before you process the Volunteer Request transaction.

  Volunteer Request transactions do not appear in the download until new user sign-up transactions are processed. Volunteer Request transactions for existing users do appear if a Profile Update

transaction is not processed. However, you should process the Profile Update before you process the Volunteer Request.

Surveys

When you process survey transactions, if the website user is new, you must first process the transaction for the user in Sign-Up Requests. Survey transactions do not appear in the download until Sign-Up Request transactions are processed.

NetCommunity Transactions in The Raiser's Edge

After you understand the NetCommunity Options in The Raiser's Edge on page 8 and the NetCommunity Transactions Overview on page 15 sections, you can begin processing Blackbaud NetCommunity transactions in The Raiser's Edge.

Note: You should periodically check the NetCommunity page in The Raiser's Edge for transactions from the website. To make sure you have the latest information from the website, click **Refresh**.

Common Procedures

The information in this section is common for multiple transaction types. For example, you can assign a batch for the Donations, Event Registrations, and Memberships transaction types.

❯ Assign a batch for transactions

Donation transactions create a gift batch in The Raiser's Edge. You can create a gift batch or use an existing gift batch to process donations.

1. From the NetCommunity page in The Raiser's Edge, click **Donations**. The Donations Transactions screen appears.

   You can also assign a batch for Event Registrations on page 72 and Memberships on page 103. Follow the same steps in this procedure to select a batch for these transaction types.

2. From the menu bar, select **Tools**, **Transaction Options**. The Transaction Options screen appears.

Note: When you assign a batch for Memberships, to access the Transaction Options screen, click **Batch Options** on the bottom of the Process Membership Transaction screen.
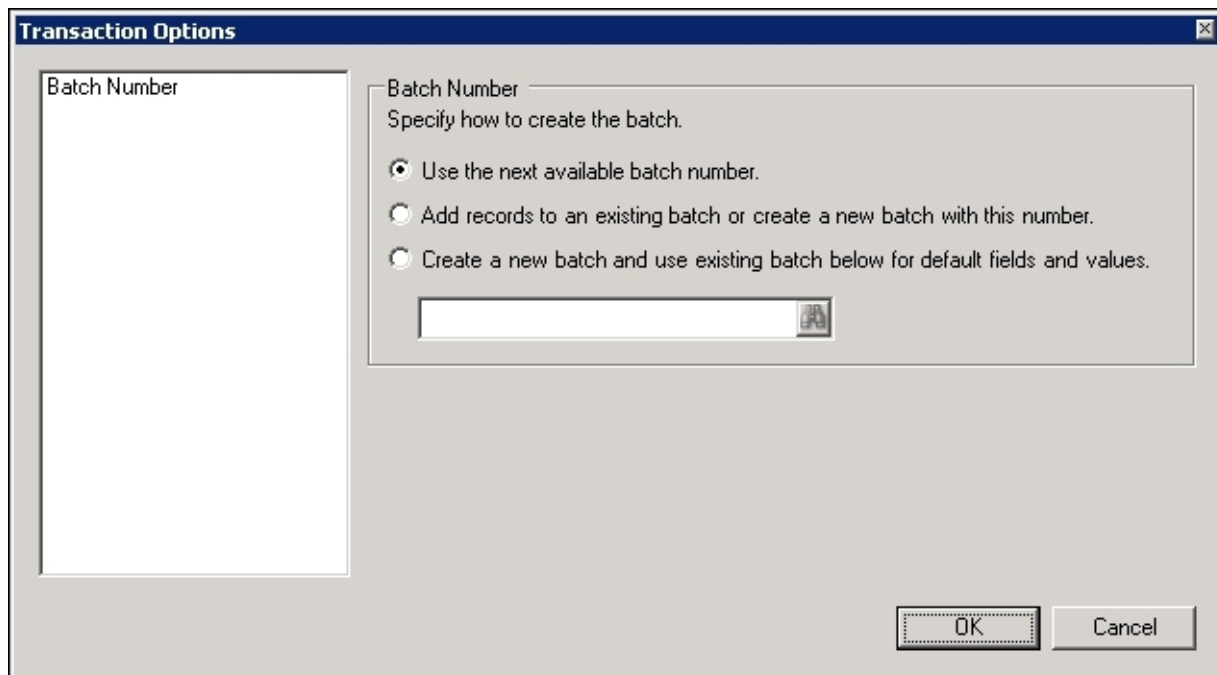
3. In the **Batch Number** frame, to assign the batch the next available number in the program, select **Use next available batch number**.

4. To download the gifts to an existing batch in The Raiser's Edge, select **Add records to an existing batch or create a new batch with this number**. Click the binoculars to select the existing batch or create a new batch for the transactions. If the batch includes a default set, the values apply to the gifts you include in the existing batch.

   If you exit the NetCommunity page, you need to select the existing batch number again when you return to process transactions. You cannot select an existing batch that has already been committed.

Tip: We recommend that you select **Add records to an existing batch**. This option downloads all transactions to the same batch. If you select another option, we recommend that after you process the first transaction, you edit the batch to assign subsequent transactions to it. To do this, open the Transaction Options screen, select **Add records to an existing batch**, and enter the batch number.

5. To load a default set of values from an existing batch for a new batch, select **Create a new batch and use existing batch below for default fields and values**. Click the binoculars to select the batch to load the default set from. Because you select a default set for a new batch, you can select from a previously committed batch.

   When you select a default set, only the Defaults tab **General** values from The Raiser's Edge *Batch* load for Blackbaud NetCommunity transactions. **Split Gift**, **Schedule**, and **Honor/Memorial** values do not load for transactions. For more information about batch default sets, see The Raiser's Edge *Batch Guide*.

6. To return to the Donations Transactions screen, click **OK**. To confirm the correct batch number is assigned to the transaction, view **Current Batch Number** in the lower left corner of the screen.

> **Process attributes**

For the Donations on page 44 and Event Registrations on page 72 transaction types, you can open an attribute screen to view, edit, and process attributes the user selected on your website. On this screen, you can prevent invalid attributes from downloading to a record in The Raiser's Edge.

1. On the transactions screen, select the Transaction Information tab.

Tip: If this tab does not appear, the user did not select attributes on the web page.
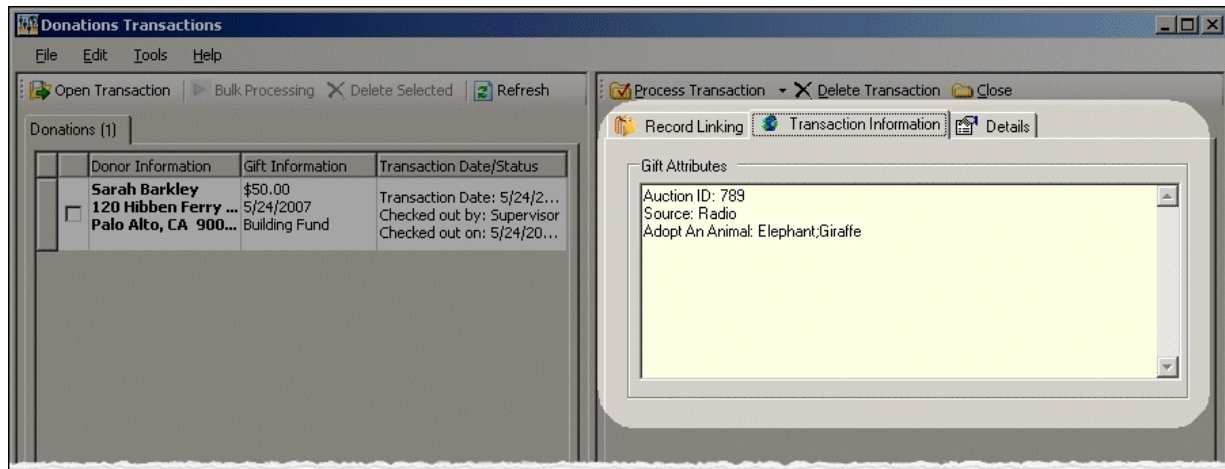
2. In the **Gift Attributes** box, press **F7** on your keyboard. An attributes screen appears. Attributes the user selected appear in the **Values** column.

Attributes Editor

No unselected attributes will be processed with constituent records. After saving changes, these unprocessed attributes cannot be retrieved and processed later.

Process?	Type	Value
☑	Auction ID	789
☑	Source	Radio
☑	Adopt An Animal	Elephant;Giraffe

Save and Close   Cancel
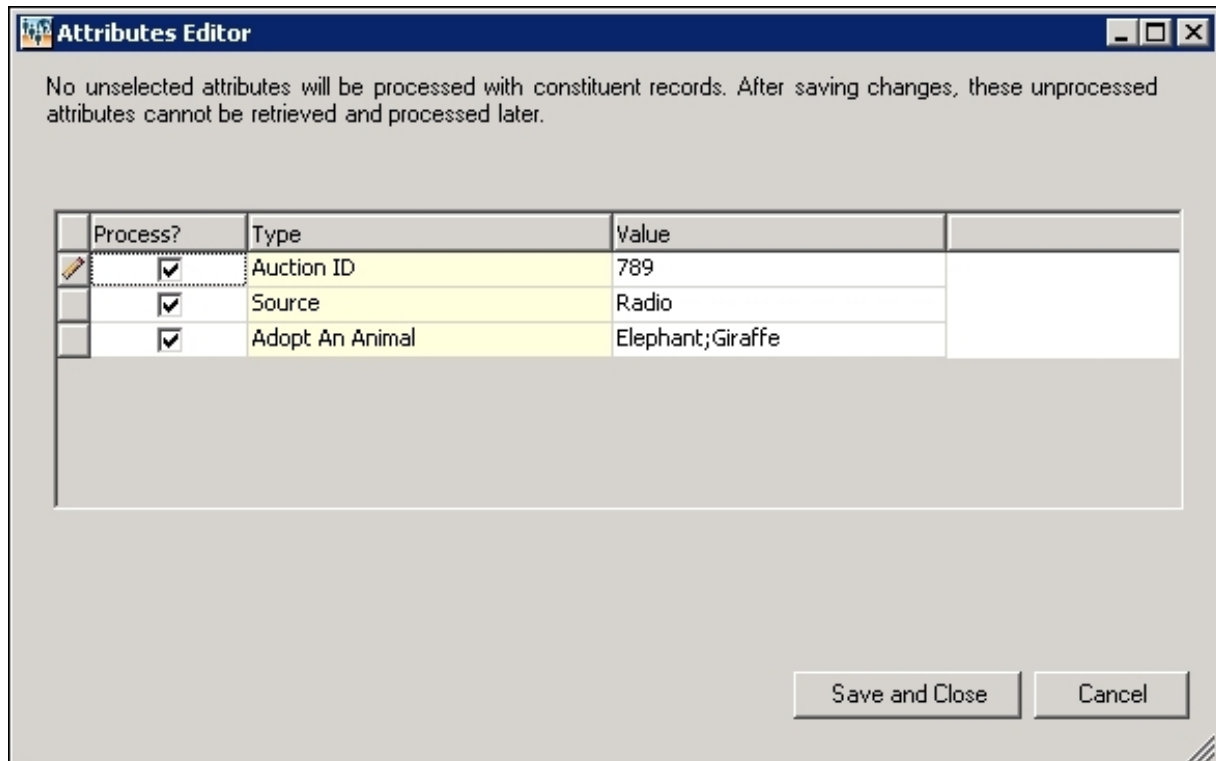
For Event Registrations, in the **Event Participation Information** box, press **F7** to view participant attributes. For more information, see Download event registrations (classic)- single transaction process on page 82.

3. If the user entered an attribute that you do not want to download to The Raiser's Edge, clear the **Process** checkbox.

4. To edit an invalid attribute, edit the attribute information in the **Values** column.

Warning: If the attribute is a table, you must select an existing attribute in the **Values** column to process the data to The Raiser's Edge.

5. After you confirm the attributes on the screen are the ones to process to a Raiser's Edge record, click **Save and Close**.

> **Export transactions**

Before you process transactions to The Raiser's Edge, export the transactions in a grid into a .csv file. This saves a record of the transactions included in the download process. You can export transactions for the Sign-Up Requests, Profile Updates, Donations, Event Registrations, Memberships, and Volunteer Requests transaction types.

1. On the individual transaction screen, click **Export Selected**.

Note: To enable **Export Selected** if it is disabled, select the checkbox beside the transaction row to export.
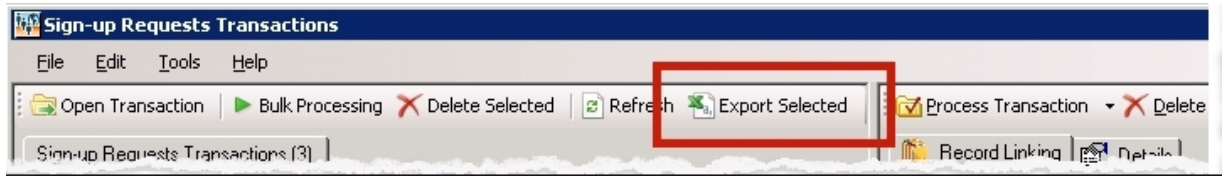
The Export Grid screen appears.

Note: When you export transactions for Memberships, to access the Export Grid screen, click **Export Selected** on the bottom of the Process Membership Transaction screen.

2. Select the checkbox for the options to export to .csv. The options vary depending on the transaction type. For example, for the Sign-Up Requests transaction, you can export data for **Constituent Biographical Information**, **Constituent Attributes**, or **NetCommunity Details**.

   The **Constituent Biographical Information** and **NetCommunity Details** are standard export options for the transaction types. **Constituent Biographical Information** exports data for the constituent in the transaction. **NetCommunity Details** exports data from the Details tab. For more information about the export options, see Export Options on page 23.

3. To open and review the .csv file after the export completes, select **Open file when export is completed**.

4. To separate field values with a line break in columns in the .csv file, select **Format fields within columns**.

   If the checkbox is not selected, field values separate by a tab in columns in the .csv file.

5. Click **OK**. The Save As screen appears.

6. In the **Save in** field, assign a location to your data file. For example, you can save this to C:\MyFiles.

7. In the **File name** field, enter the name of the .csv file the export creates.

   The value in the **Save as type** field defaults to CSV Excel (*.csv).

8. Click **Save**. The export processes. If you selected **Open file when export is completed** on the Export Grid screen, the .csv file opens. If you did not select the checkbox, you can access the file from the saved location.

Export Options

Review the following tables for information about the available export options for the transaction types.

Sign-Up Requests

Constituent Biographical Information	Constituent Attributes	NetCommunity Details

Donations

Constituent Biographical Information	Gift Information	Gift Attributes
Transaction Bank Information	Constituent Bank Information	**Fund Information**
Matching Gift Information	**Payment Information**	**Tribute Information**
Transaction Tribute Information	NetCommunity Details	

Event Registrations

Constituent Biographical Information	Fund Information	Gift Information
Matching Gift Information	Payment Information	**Participant Information**
NetCommunity Details		

Memberships

Constituent Biographical Information	Gift Information	Gift Attributes
Matching Gift Information	Membership Information	Membership Benefits Information
Membership Cards Information	Gift of Membership Information	Transaction Bank Information
Constituent Bank Information	Fund Information	Payment Information
NetCommunity Details	Transaction Guid	

Volunteer Requests

Constituent Biographical Information	Volunteer Job Information	Volunteer Information
NetCommunity Details		

Sign-Up Requests

When a new website user logs in to your website for the first time, a sign-up request transaction generates for The Raiser's Edge. When you process the transaction, if the new user does not have a constituent record in The Raiser's Edge, you create a record for the user. If the user has an existing constituent record in The Raiser's Edge, you link the user to the record. Several parts generate sign-up request transactions for new users including the Fundraiser, Personal Page Manager, and User Login parts.

Before you process Sign-Up Requests, you should select options in . Specifically, you can apply to Sign-Up Requests. Review that section before proceeding with this section.

There are two main ways to process Sign-up Requests — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the user with an existing Raiser's Edge record or add the user as a new record in the database.

- Bulk — You can select all users and process every transaction simultaneously. If you process all transactions, you may need to clean up data in The Raiser's Edge after processing completes.

Show Me: Watch a video tutorial about processing sign-up requests individually.

❯ Download sign-up requests — single transaction process

When you use the single transaction process, you select each row individually to match the user with an existing Raiser's Edge record or add the user as a new record in the database.
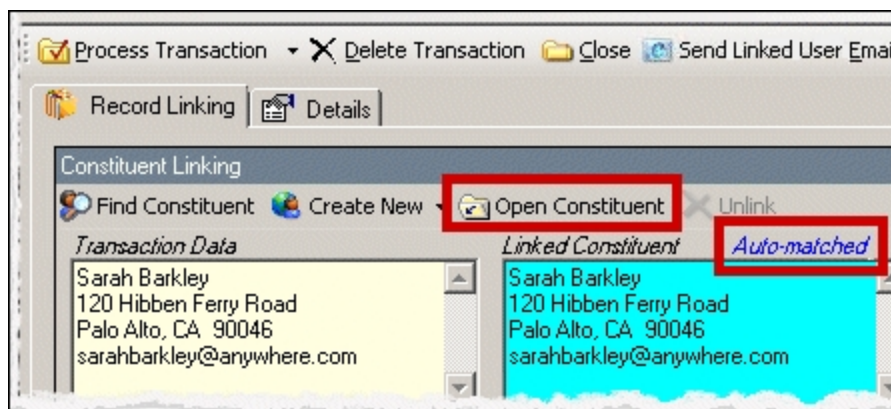
1. From the NetCommunity page in The Raiser's Edge, click **Sign-up Requests**. The Sign-up Requests Transactions screen appears.

2. On the Sign-up Requests Transactions tab, select the row to process by clicking in the **Sign-up Information** column. The **Constituent Linking** frame appears on the right and opens to the Record Linking tab.

Tip: This tab is called Assigned Sign-up Requests Transactions when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.
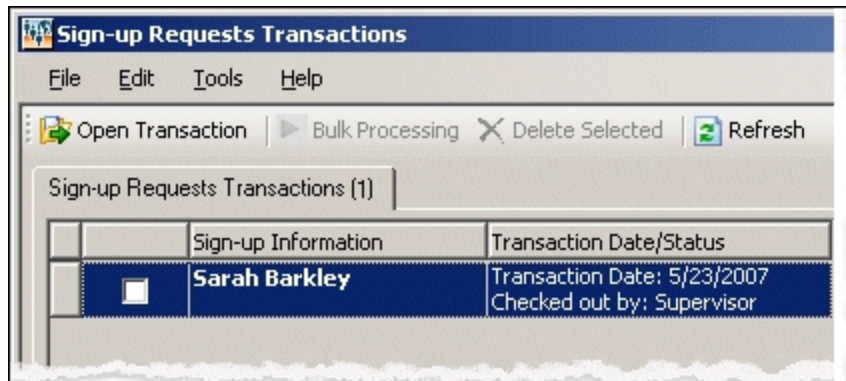
The **Transaction Date/Status** column on the Sign-up Requests Transactions tab defaults the date the user submitted the transaction on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out on** information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. In the **Constituent Linking** frame on the right, data from Blackbaud NetCommunity appears in the **Transaction Data** box. If your **Constituent Matching** options match a Raiser's Edge record, Raiser's Edge data appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the Raiser's Edge record for the user, click **Open Constituent**.

Tip: If duplicate records are found {Duplicates Found} appears in the **Linked Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

If you are sure the website user is the matched Raiser's Edge constituent and do not need to change the transaction, proceed to the **Transaction Constituent Code** step. If the records in the **Constituent Linking** frame match and you want to review or edit the transaction, click **Find Constituent** above the **Transaction Data** box. A screen appears with additional data that the user submitted on your site.
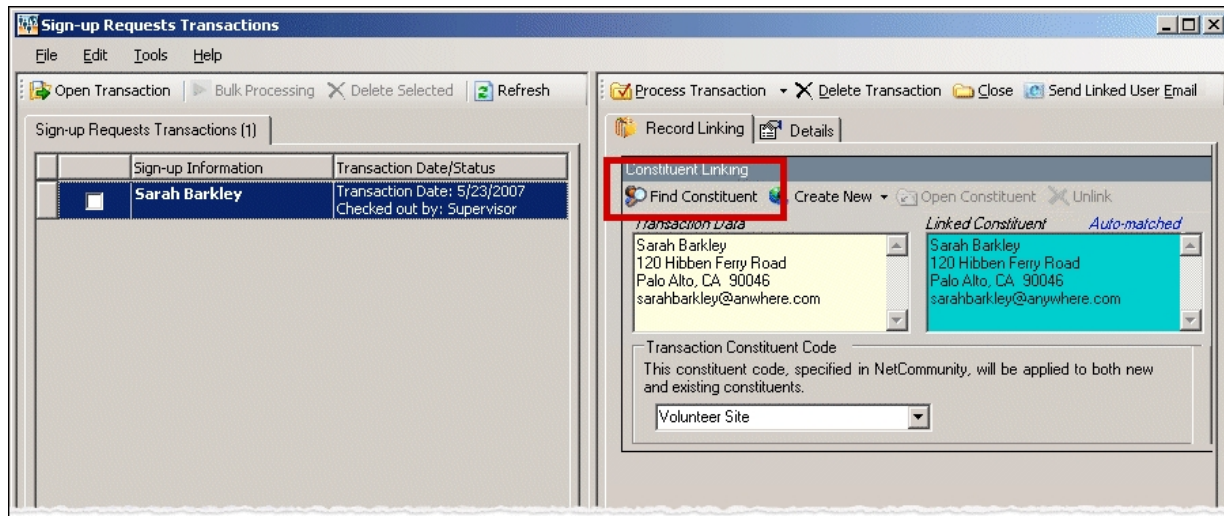
If the **Linked Constituent** box is blank, you must link the website user with an existing Raiser's Edge record or create a record for the user. For more information, see the next step.

Note: You can send a user an email from Sign-up Requests. For example, you can send a forgotten user ID email to a user who attempts to register again. When the website user is auto-matched to a Raiser's Edge record that is linked to a Blackbaud NetCommunity user, the **Send Linked User Email** button appears. When you click this button, the email template selected in the **Linked User Email** option appears for you to send the email. For more information about the option, see Linked User Email on page 12.

4. To search for an existing Raiser's Edge constituent, click **Find Constituent**.
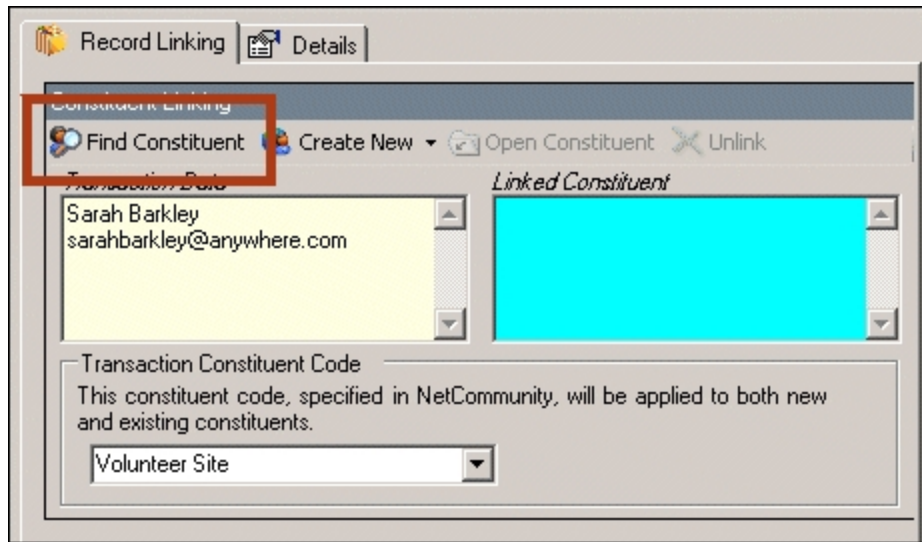
Tip: If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the Edit Profile button appears.

A NetCommunity Transaction screen appears.

a. If the user entered information in the applicable section on the sign-up form, the Biographical, Preferred Address, Primary Business, and Constituent Attributes tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b. To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c. To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, if you select the checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f. If a a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

Note: If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

If an existing record does not match the sign-up request, click **Link Constituent**, **Create New Constituent**. For information about creating new constituents, see the next step.
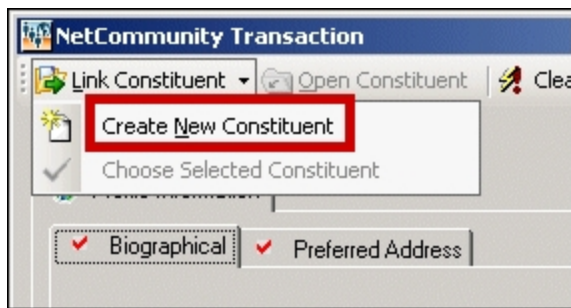
5. To create a record in The Raiser's Edge, click **Create New**, **Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box to indicate a record has been created in The Raiser's Edge for the user.
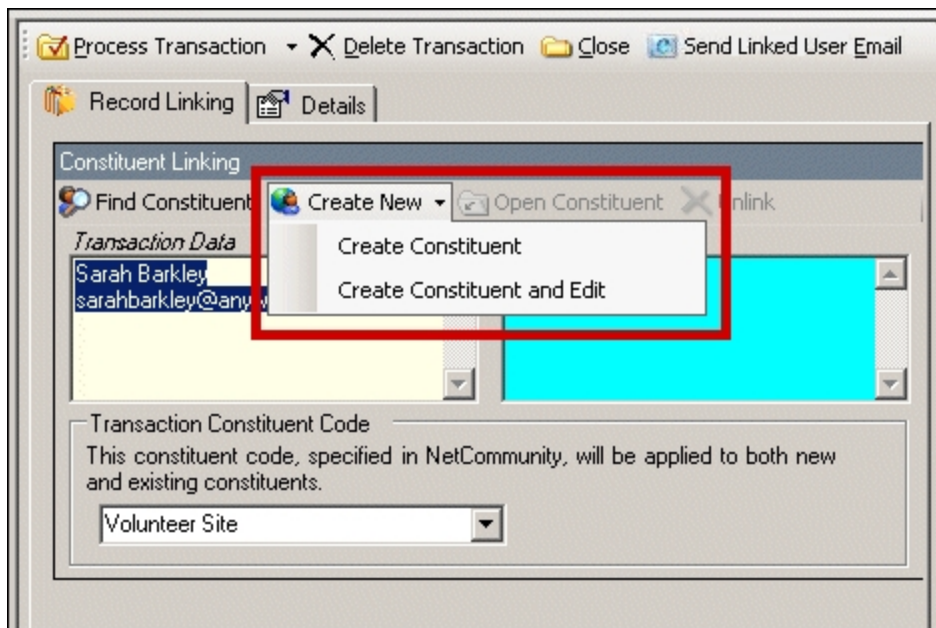
a. To edit data the website user entered, click **Create New**, **Create New and Edit**. A screen appears to compare existing Raiser's Edge data with the user sign-up request information. If the user entered information in the applicable section of the sign-up form, the Biographical, Preferred Address, Primary Business, and Constituent Attributes tabs appear. You can process each tab individually or all at one time.

b. For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge.

c. Information provided by the user during the sign-up appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

d. Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

6. In the **Transaction Constituent Code** frame, the constituent code selected on the part appears in the field. You can change or remove the constituent code in this field. This constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

If the constituent codes in the **Transaction Constituent Code** frame and the **New Constituents** option are the same, the constituent codes do not duplicate on the Bio 2 tab. If the constituent codes are different, both codes download to the constituent record. For more information about the option, see New Constituents on page 10.

7. To view origin information for the sign-up, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
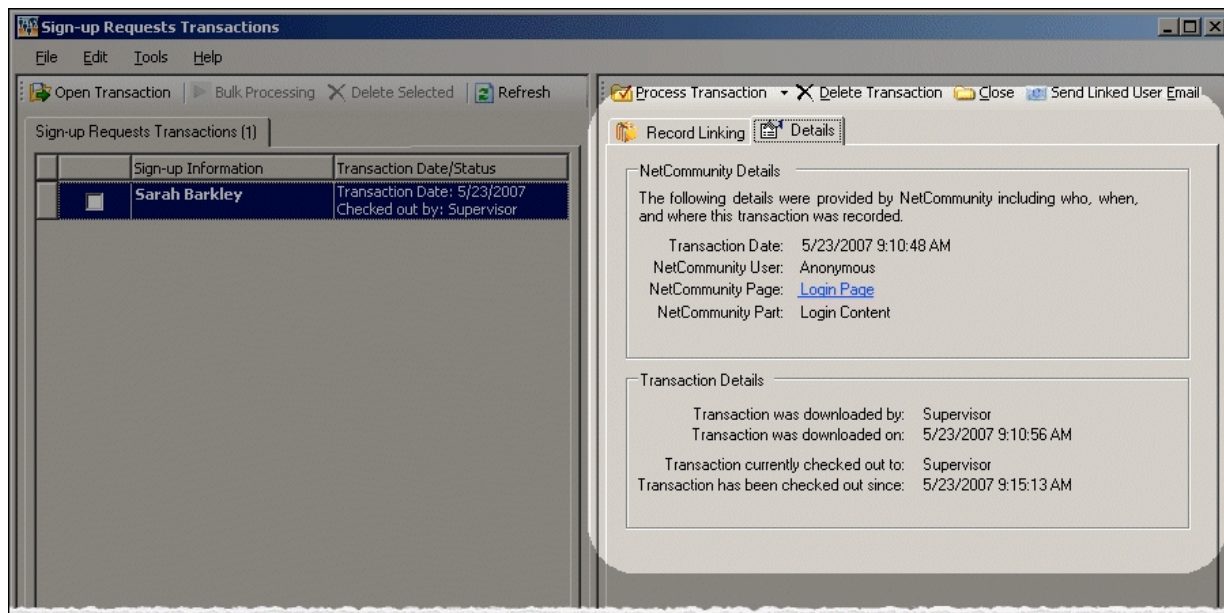
8. To process the selected sign-up, click **Process Transaction**.
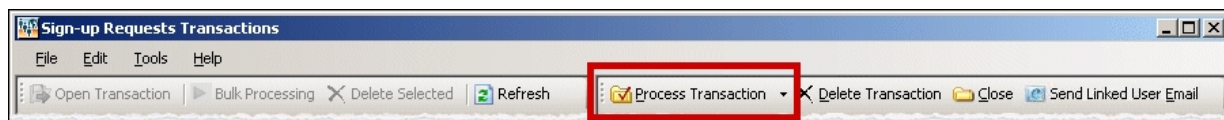
   To save your information, but not process the transaction, click **Process Transaction**, **Save Changes**. You can process the transaction at another time.
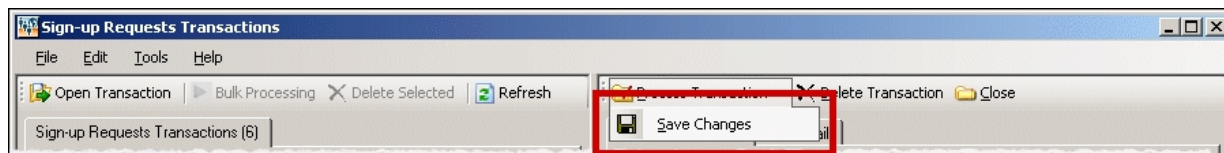
9. Repeat this procedure to individually process any sign-up requests on this screen that remain.

Tip: To make sure you have the latest information from the website, click **Refresh**.

10. When you finish, click **Close**. You return to the NetCommunity page in The Raiser's Edge.

> **Download sign-up requests — bulk process**

   When you use bulk process, you select to download all sign ups to the The Raiser's Edge and process every transaction simultaneously. If you process everything, you may need to clean up data in The Raiser's Edge after processing completes.

1. From the NetCommunity page in The Raiser's Edge, click **Sign-up Requests**. The Sign-up Requests Transactions screen appears.

Tip: To make sure you have the latest information from the website, click **Refresh**.

2. To process every transaction on the screen, select **Select All**. When you select this, every row appears with a checkbox. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

3. Click **Bulk Processing**. The Process User Sign-up Requests screen appears.

4. On the Processing tab, review bulk properties such as **Transactions Selected** and **Successfully Checked Out**.

5. On the Options tab, select options for **Unlinked Records** and **Transaction Profile Data** in the bulk process.

    a. In the **Unlinked Records** frame, to attempt constituent matching based on Constituent Matching options, select **Attempt auto-match to an existing record**. For more information, see Constituent Matching on page 13.

    b. To create Raiser's Edge records for the website users, select **Create new Raiser's Edge record automatically**.

    c. To ignore Raiser's Edge required fields, select **Bypass required fields**. For more information, see Required Fields in The Raiser's Edge on page 16.

    d. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the website user. If you accept profile information, the data defaults to the constituent record in The Raiser's Edge.

    Accept Profile Information is selected by default for each bulk process. To reject information, you must select **Reject Profile Information** for each bulk process.

Warning: When you select to bulk process sign-up requests, the program ignores any changes you make to the selected records on the Sign-up Requests Transactions screen. If you select **Accept Profile Information**, *all* data downloads to The Raiser's Edge. This includes partial data from a transaction (for example, an incomplete street address). If you select **Reject Profile Information**, no profile updates are downloaded.

6. When you finish, on the Process tab, click **Process Now**. Bulk processing begins.

7. When the process is complete, click **Close** on the Process New User Sign-ups screen. You return to the User Sign-up Requests screen.

8. Click **Close**. You return to the NetCommunity page in The Raiser's Edge.

Profile Updates

You can update constituent records in The Raiser's Edge with changes website users make to online profiles. For example, an alumnus may let you know through the website of an address change or graduate degree information.

Note: The Profile Updates download also includes profile updates from a User Education Profile Form part.

You can only process updates for website users that have been previously matched to a Raiser's Edge record on the NetCommunity page in The Raiser's Edge. If The Raiser's Edge record has been deleted, the transaction is invalid and you must reject the profile update.

Before you process profile updates, you should select options in NetCommunity Options in The Raiser's Edge on page 8. Specifically, you can apply Transaction Assignments on page 13 to profile updates. Review that section before proceeding with this section.

> ## Download profile updates and user education profile updates

1. From the NetCommunity page in The Raiser's Edge, click **Profile Updates**. The Profile Updates Transactions screen appears.

2. On the Profile Updates tab, select the row to process by clicking in the **Online Profile Information** column. Depending on the profile information the user updated, a variety of tabs appear on the right.

Tip: This tab is called Assigned Profile Updates when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.
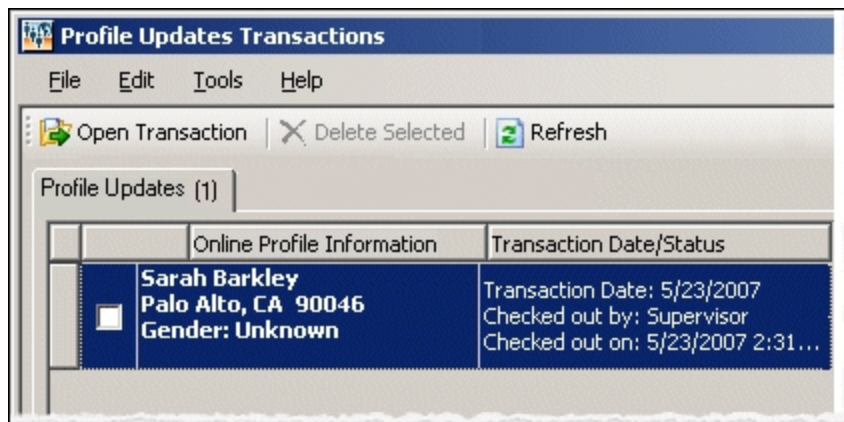
The **Transaction Date/Status** column on the Assigned Profile Updates tab defaults the date the user submitted the transaction on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out** on information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. If the user updated information in the applicable section on the profile form, the Profile Information tab on the right can include the Primary Business, Biographical, Education, Preferred Address, Spouse, Constituent Attributes, and Notes tabs. Beginning with the first tab, select **Process** for each field to update on the Raiser's Edge record. If you clear **Process** for a field, the data in Raiser's Edge remains the same.

Tip: To process every field on the tab, select **Select All**. When you select this, every row appears with a checkbox in the **Process** column.
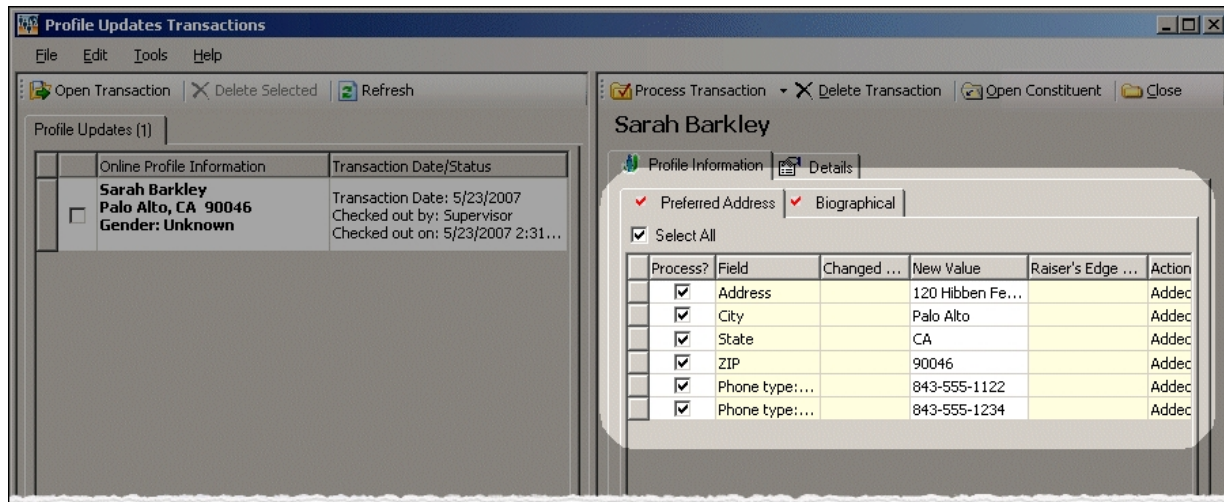
Several tabs include process options for downloading the information to The Raiser's Edge. For more information, see .

4. Information provided by the user appears in the **New Value** column. The existing Raiser's Edge data appears in the **Raiser's Edge** column. To edit any data a user entered, make changes in the appropriate row in the **New Value** column.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

5. Repeat steps 3 and 4 for the remaining tabs.

Warning: If you click **Process Transaction**, **Apply Selected Updates**, every field marked **Process** on the tabs are processed simultaneously. For more information about this button, see the Process Transaction step.

6. To view origin information for the profile update, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
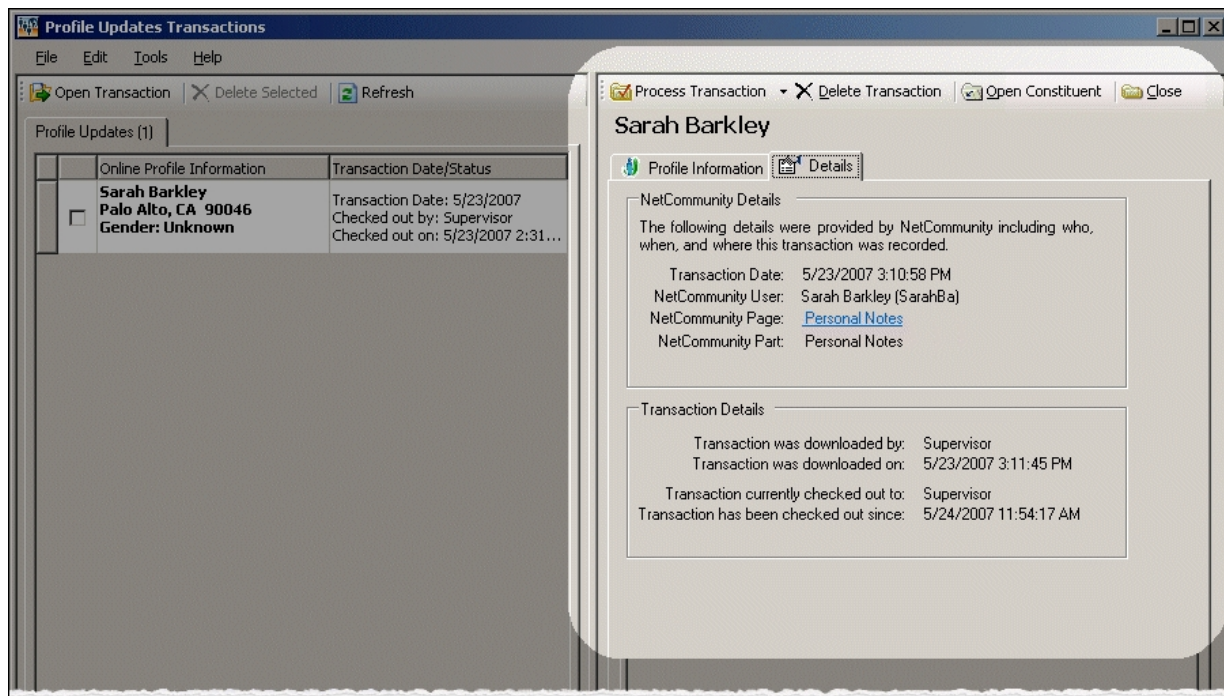
7. To process the information, click **Process Transaction**.
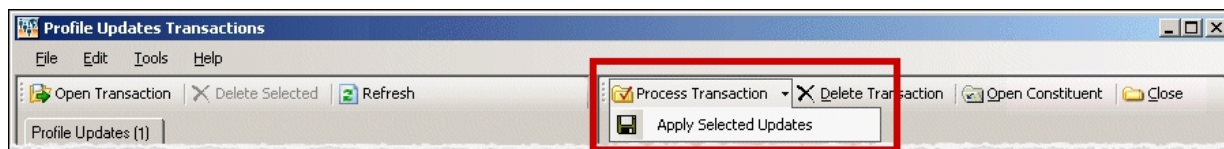
To partially process a transaction, click **Process Transaction**, **Apply Selected Updates**. A partially processed transaction includes the changes that you selected **Process** for. If another profile update for the user downloads to Profile Updates, data can be overwritten by the second profile update.

8. Repeat this procedure to process any profile updates on the Profile Updates Transactions screen that remain.

Tip: To make sure you have the latest information from the website, click **Refresh**.

9. To delete any transaction you do not want to process, select the row and click **Delete Transaction**.
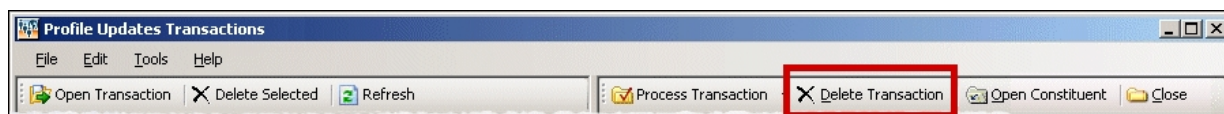
A confirmation message appears. Click **Yes**.

10. When you finish, click **Close**. You return to the NetCommunity page in The Raiser's Edge.

THE RAISER'S EDGE NETCOMMUNITY PAGE 37

Process Tabs for Profile Updates

If the user updated information in the applicable section on the profile form, the Profile Information tab on the right can include the Primary Business, Biographical, Education, Preferred Address, Spouse, Constituent Attributes, and Notes tabs. Several tabs include processing options for downloading the information to The Raiser's Edge. This section includes information about these options for the Primary Business, Education, Preferred Address, and Notes tabs.

Note: Refer to the information in this section for step 3 in Download profile updates and user education profile updates on page 34.

Primary Business Tab

On the Primary Business tab, select whether to **Update the primary business with the downloaded information** or **Add the downloaded information as a new organization relationship for this constituent**. If you update the information, you can select the checkbox to **Update shared organization name**. If you add the information as an organization relationship, you can **Make this new organization the primary business**.

Warning: If the website user is linked to an organization record on the Relationships tab in The Raiser's Edge, other relationship records linked to the organization receive the updated primary business profile information. For example, Mark Adamson works for Charleston Development Corporation at 6401 Rivers Avenue. On Mark's profile form, he incorrectly submits the address as 5401 Rivers Avenue. If you accept Mark's primary business profile data, the incorrect address updates Charleston Development's organization record. In addition, the incorrect address updates other relationships linked to Charleston Development in The Raiser's Edge. To prevent incorrect data from appearing in The Raiser's Edge, reject the primary business profile data.

Education Tab

On the Education tab, select **Make Primary** to designate an education record as the main or most recent education record for the constituent. To save the field values in a new record, select **Create New**.

Preferred Address Tab

On the Preferred Address tab, select whether to **Update the preferred address with the downloaded information** or **Add the downloaded information as a new address for this constituent**. If you add the information as a new address, you can **Make this new address the preferred address**. In the **Previous address type** field, select an address type for the old address in the **Changed From** column. If the **Update Shared Address?** checkbox appears, the user has a shared address in The Raiser's Edge. To update shared address information, select the checkbox.

Notes Tab

On the Notes tab, to edit information a user entered (on the Personal Notes part), click **Edit**. A Notepad Details screen appears for you to edit the personal note.
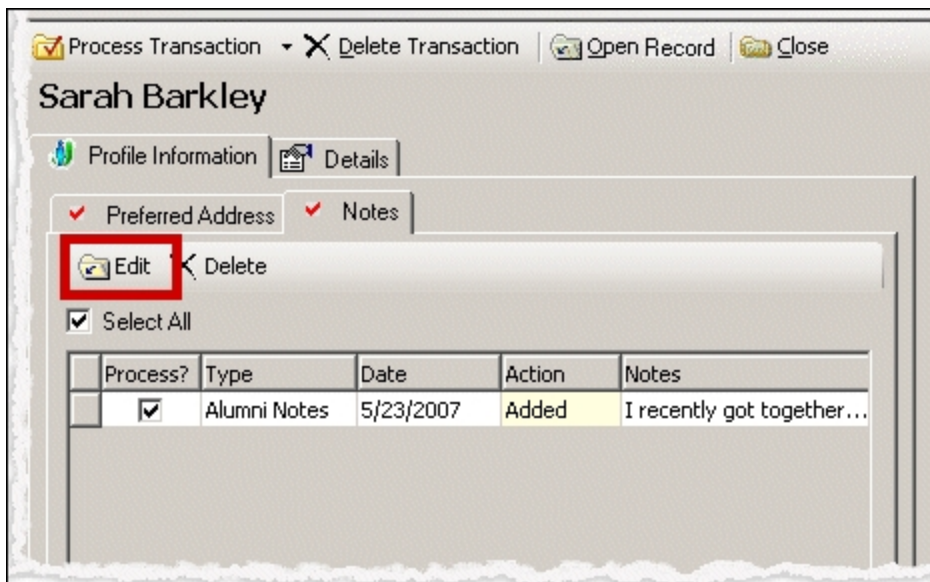
Fundraisers

It is critical to process team fundraising data in the following order.

- First, process all user sign-up requests.
- Second, process all fundraiser updates.
- Last, process all donations or event registrations.

If you have not processed sign-up requests from a fundraiser, do not process Fundraiser transactions. To determine if a sign-up request is from a fundraiser, on the Sign-up Requests Transactions screen, select the Details tab. If the **NetCommunity Page** or **NetCommunity Part** fields indicate the user signed up via the fundraiser, you must process the sign-up transaction before you process fundraiser data. For information about sign-up request transactions, see Sign-Up Requests on page 24.

Warning: If you do not follow the correct process order for Fundraisers, you risk a negative impact to your fundraiser numbers, reports, and user experience. For more information, see Process Order for Transaction Types on page 16.

If you move a solicitor to another team in The Raiser's Edge, the next time the solicitor logs into the Fundraiser on your website, the solicitor sees he or she is on a different team.

> **Download fundraisers**
> 1. From the NetCommunity page in The Raiser's Edge, click **Fundraisers**. The Fundraisers screen appears.
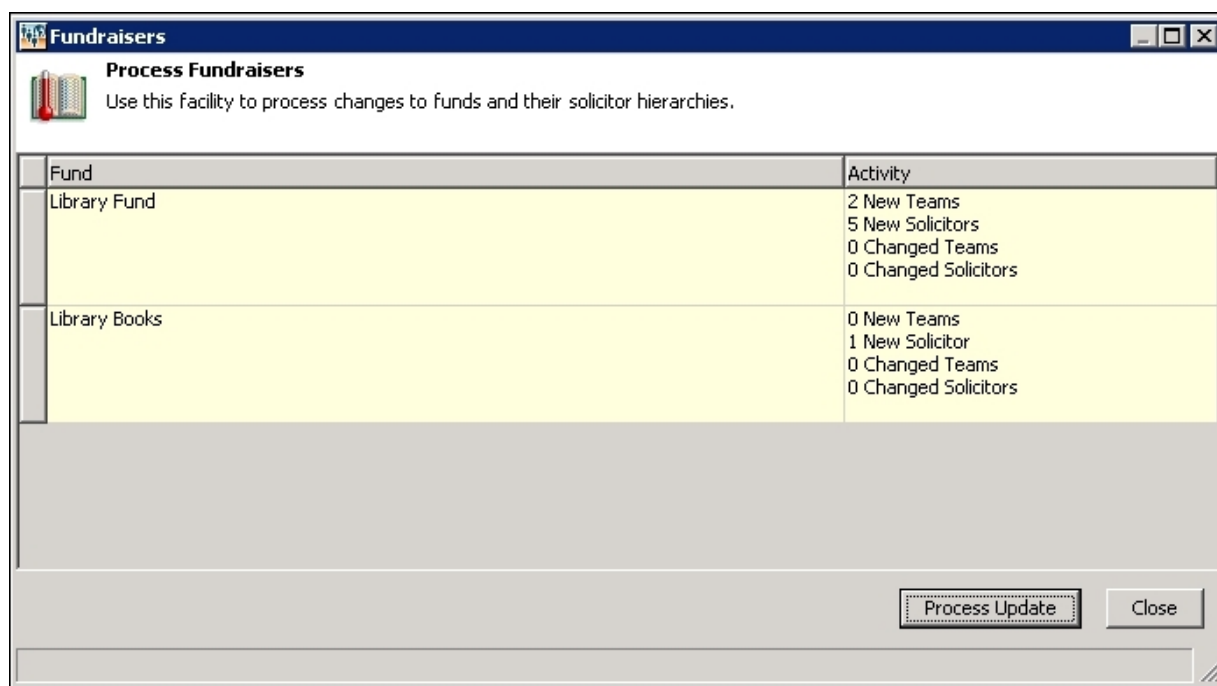
2. In the **Fund** column, the fund name for the Fundraiser part appears. Review the number of new and changed teams and solicitors in the **Activity** column.

3. Double-click the row of information you need. A team and solicitor tree view appears for the fund.
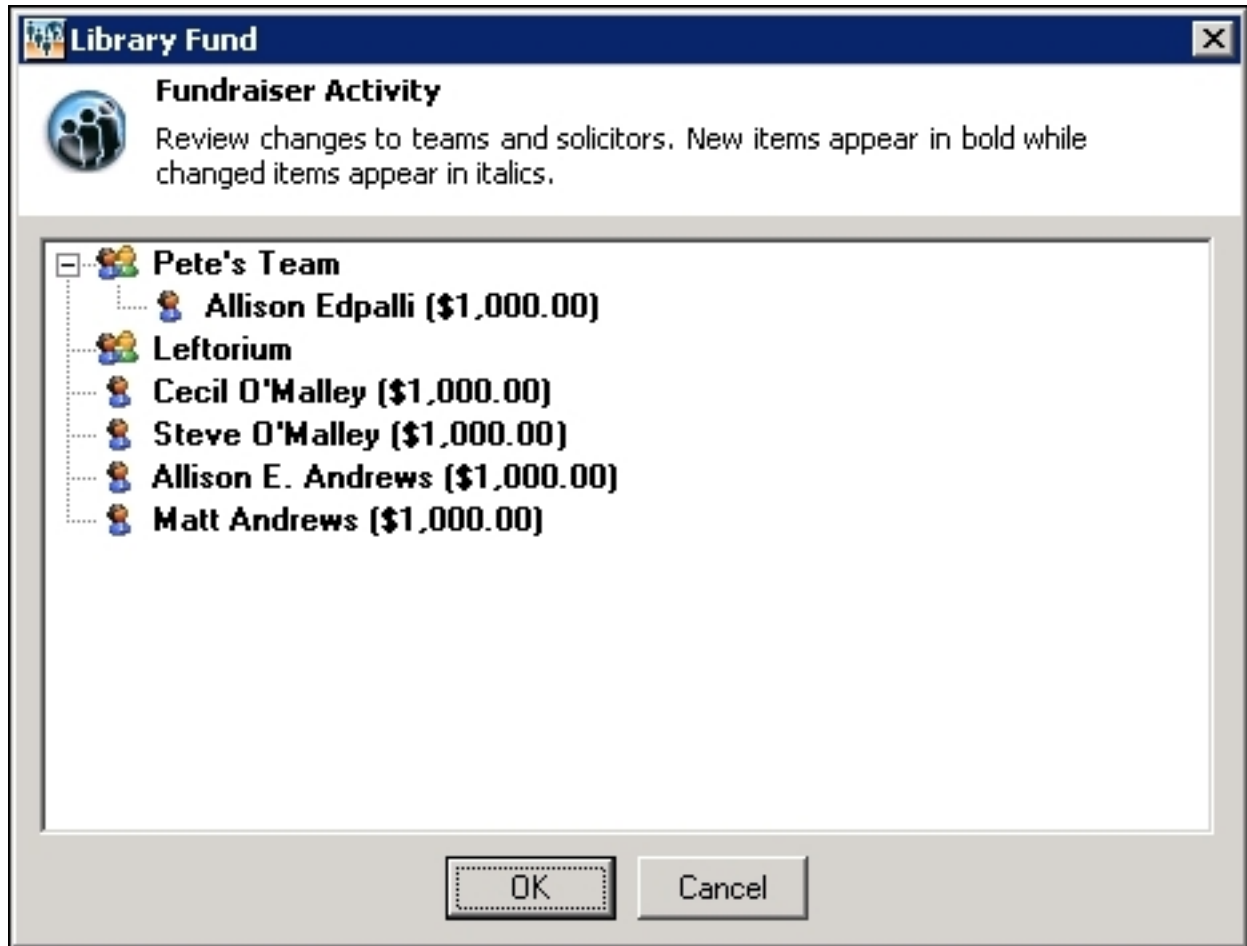
4. View the team and solicitor changes, such as new individual solicitors, new solicitors added to teams, new teams, and edited fundraising goals.

5. To accept these changes, click **OK**. You return to the Fundraisers screen.

6. Click **Process Update**. You return to the NetCommunity page in The Raiser's Edge.

Personal Pages

You can download personal page requests from Blackbaud NetCommunity to The Raiser's Edge. The download process adds a new phone type to the personal page owner's constituent record with a link to the personal page. Use this process as an approval system to manage who is allowed to have a personal page. You can reject a personal page request by deleting the request from the process screen. Rejecting a request deletes the personal page from Blackbaud NetCommunity automatically.

> **Download personal pages**

1. From the NetCommunity page in The Raiser's Edge, click **Personal Pages**. The Personal Page Requests screen appears. The grid lists each request ready to process.

2. Select the checkbox in the **Process Now** column for each personal page request to download.

3. To reject a personal page request, select that request in the grid and click **Delete Row**. A confirmation message appears. Click **Yes**. Rejecting a request also deletes the personal page from Blackbaud NetCommunity.

4. Click **OK**. You return to the NetCommunity page in The Raiser's Edge.

Donations

Before you process donations, you should select options in NetCommunity Options in The Raiser's Edge on page 8. Specifically, you can apply Transaction Assignments on page 13 to donations. Review that section before proceeding with this section.

If you are about to process donations for a Fundraiser part, you should first process Fundraiser transactions. Then download the donations. For more information about Fundraiser transactions, see Fundraisers on page 41.

There are two main ways to process Donations — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the donor with an existing Raiser's Edge record or add the donor as a new record in the database.

- Bulk — You can select all donors and process every donation simultaneously. If you process all donations, you may need to clean up data in The Raiser's Edge after processing completes.

When you process transactions, you must make more decisions beyond using the single or bulk process. For example, you may want to create a batch in The Raiser's Edge to specifically use for donations from Blackbaud NetCommunity. Or you may want to create the batch in the Donations transaction. Review the following diagram for an example of one way to process donations. Before you begin regularly processing transactions, a best practice decision should be made for your organization.
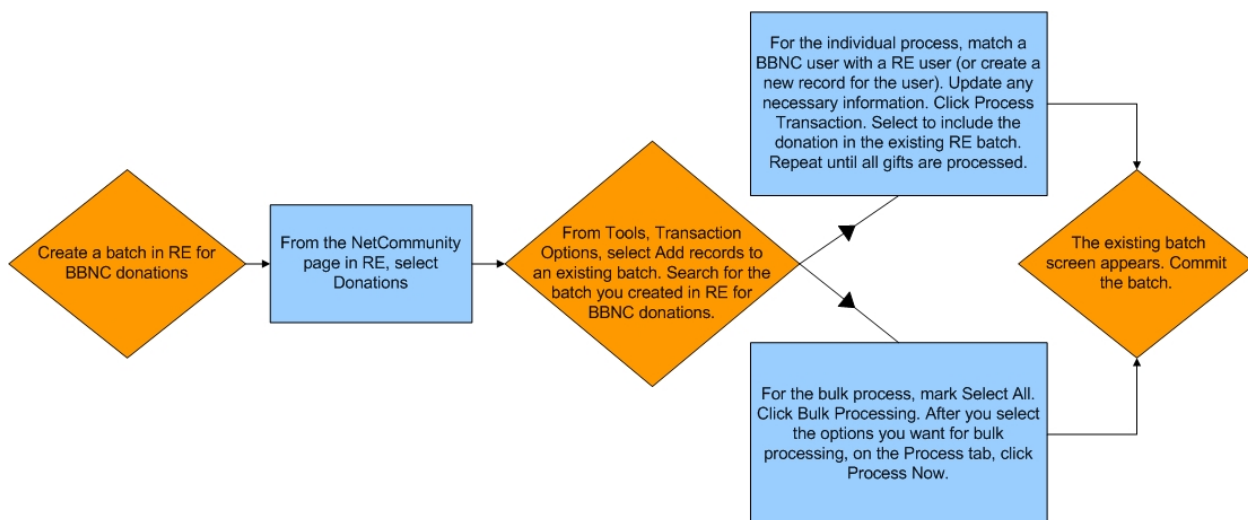
Warning: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), you cannot process a donation that contains recurring gift information if you use The Raiser's Edge 7.85 or earlier. To process recurring gift transactions, update The Raiser's Edge to version 7.86 or later.

Download donations - single transaction process

When you use the single transaction process, you select each row individually to match the donor with an existing Raiser's Edge record or add the donor as a new record in the database.

1. From the NetCommunity page in The Raiser's Edge, click **Donations**. The Donations Transactions screen appears.

Note: Donation transactions create a gift batch in The Raiser's Edge. From **Tools**, **Transaction Options**, you can select batch options before you process a donation. The batch screen does not appear until you process the donation. For more information, see Step 14 in this procedure and Assign a batch for transactions on page 18.

2. On the Donations tab, select the row to process by clicking in the **Donor Information** column. The **Constituent Linking** frame appears on the right and defaults to the Record Linking tab.

Tip: This tab is called Assigned Donations when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.

The **Gift Information** column displays the donation amount, the gift date, fund, and source (or appeal). If you support multiple currency types, review the following.

*   If a gift amount has been converted to your local currency, the converted amount displays in "( )" in the **Gift Information** column.
*   Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see the Blackbaud NetCommunity *Administration Guide*.
*   In Blackbaud NetCommunity *Administration*, add an IATS merchant account for each currency type.

The **Transaction Date/Status** column on the Donations tab defaults the date the user submitted the donation on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out on** information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. In the **Constituent Linking** frame on the right, data from Blackbaud NetCommunity appears in the **Transaction Data** box. If your **Constituent Matching** options match a Raiser's Edge record, Raiser's Edge data appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the Raiser's Edge record for the user, click **Open Constituent**.

Tip: If duplicate records are found {Duplicates Found} appears in the **RE Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

If you are sure the website user is the matched Raiser's Edge constituent and do not need to change the transaction, proceed to the **Transaction Constituent Code** step. If the records in the **Constituent Linking** frame match and you want to review or make changes to the transaction, click **Find Constituent** above the **Transaction Data** box. A screen appears to view additional data the user submitted on your site.

If the **Linked Constituent** box is blank, you must link the website user with an existing Raiser's Edge record or create a record for the user. For more information, see the next step.

4. To search for an existing Raiser's Edge constituent, click **Find Constituent**.

Tip: If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

A NetCommunity Transaction screen appears.

a. If the user entered information in the applicable section on the donation form, the Biographical, Preferred Address, and Primary Business tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

Note: We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b. To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c. To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, if you select the checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e.   To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f.   If a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

Note: If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

If an existing record does not match the donor, click **Link Constituent**, **Create New Constituent**. For information about creating new constituents, see the next step.

5. To create a record in The Raiser's Edge, click **Create New**, **Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box. A record has been created in The Raiser's Edge for the user.

a. To edit data the website user entered, click **Create New**, **Create New and Edit**. A screen appears to compare existing Raiser's Edge data with the donor information. If the user entered information in the applicable section of the donation form, the Biographical, Preferred Address, and Primary Business tabs appear. You can process each tab individually or all at one time.

b. For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge.

c. Information provided by the user during the donation appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

d. Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box.

6. In the **Transaction Constituent Code** frame, the constituent code selected on the part appears in the field. You can change or remove the constituent code in this field. This constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

    If the constituent codes in the **Transaction Constituent Code** frame and the **New Constituents** option are the same, the constituent codes do not duplicate on the Bio 2 tab. If the constituent codes are different, both codes download to the constituent record. For more information about the option, see New Constituents on page 10.

7. In the **Organization Linking** frame, in the **Transaction Data** box, view organization information for a corporate gift.

Note: The **Organization Linking** frame appears only if the donation is a corporate gift.

a. To search for an existing Raiser's Edge organization record, click **Find Organization**.

b. To create an organization record in The Raiser's Edge, click **Create New**. An **Auto-matched** indicator appears above the **Linked Organization** box. A record has been created in The Raiser's Edge for the organization.

c. To link the new record, click **Open Linked**. The organization record appears in The Raiser's Edge. On the Raiser's Edge toolbar, click **Save and Close**. You return to the **Organization Linking** frame. **Linked** appears above the **Linked Organization** box.

8. In the **Tribute Linking** frame, in the **Transaction Data** box, view tribute information if the donation was made in honor or memory of another person.

Note: The **Tribute Linking** frame must meet several conditions to appear. Your organization must use The Raiser's Edge *Honor/Memorial Tracking* and you must select to include tributes on the Donation Form part. Lastly, the website user must submit tribute information on your site for the frame to appear.

a. To search for an existing Raiser's Edge tribute, click **Find Tribute**.
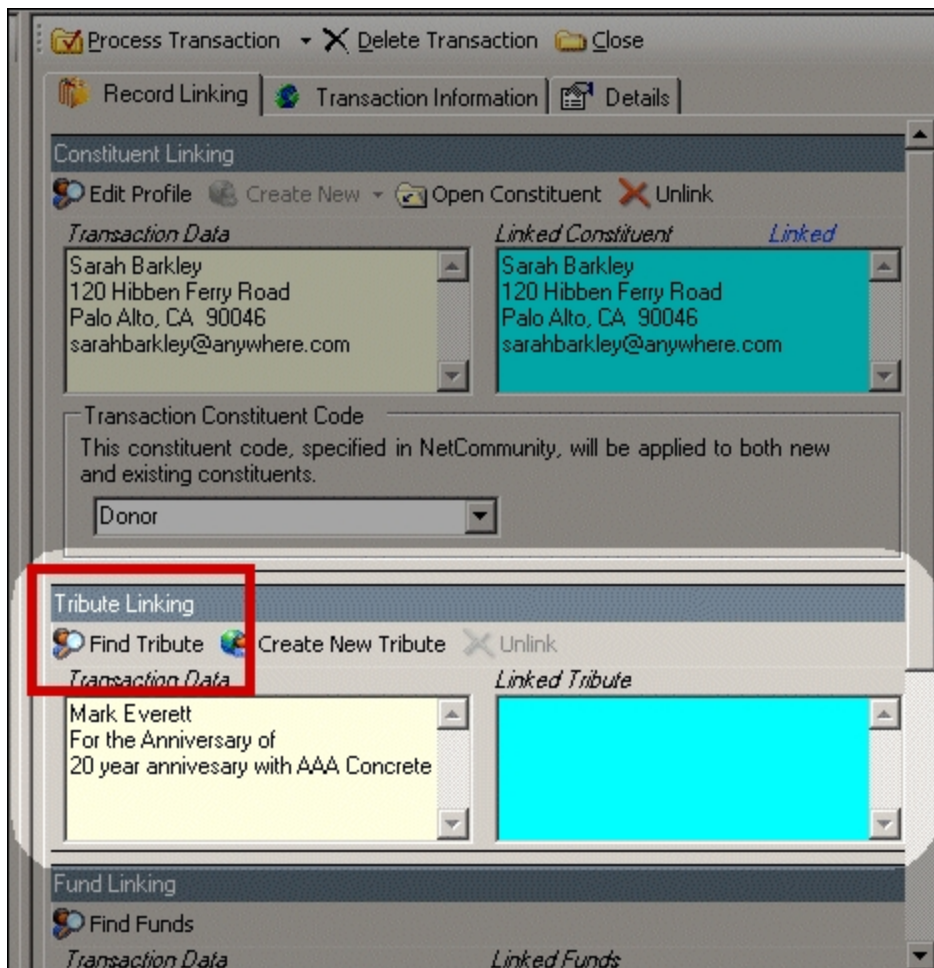
The Link Tribute Information screen appears. The **Tribute Information from Transaction**, **Linked Tribute Information**, and **Acknowledgee** data defaults from the website.

b. In the **Honor/Memorial** field, click the binoculars to search for an existing Raiser's Edge honor/memorial record.

c. In the **Tribute** field, select a tribute type from The Raiser's Edge.

d. In the **Acknowledgee** box, to link the acknowledgee to a Raiser's Edge relationship record, press **F7**. A screen appears for you to link to an existing record in The Raiser's Edge. If the acknowledgee does not have an existing record, return to the Link Tribute Information screen. When you click **OK** on this screen, a new relationship record is created for the acknowledgee.

After you link the acknowledgee to a Raiser's Edge record, acknowledgee information appears in the **Linked Record** box.

e. To return to the **Tribute Linking** frame, click **OK**. Tribute data from The Raiser's Edge appears in the **Linked Tribute** box. **Linked** appears above the box.

f. To create a tribute record in The Raiser's Edge, click **Create New Tribute**. **Linked** appears above the **Linked Tribute** box. A record has been created in The Raiser's Edge for the tribute.

9. In the **Fund Linking** frame, in the **Transaction Data** box, view the fund information for the donation. If there is a match for the fund the user entered on your website, a link is established to the Raiser's Edge fund in the **Linked Funds** box.
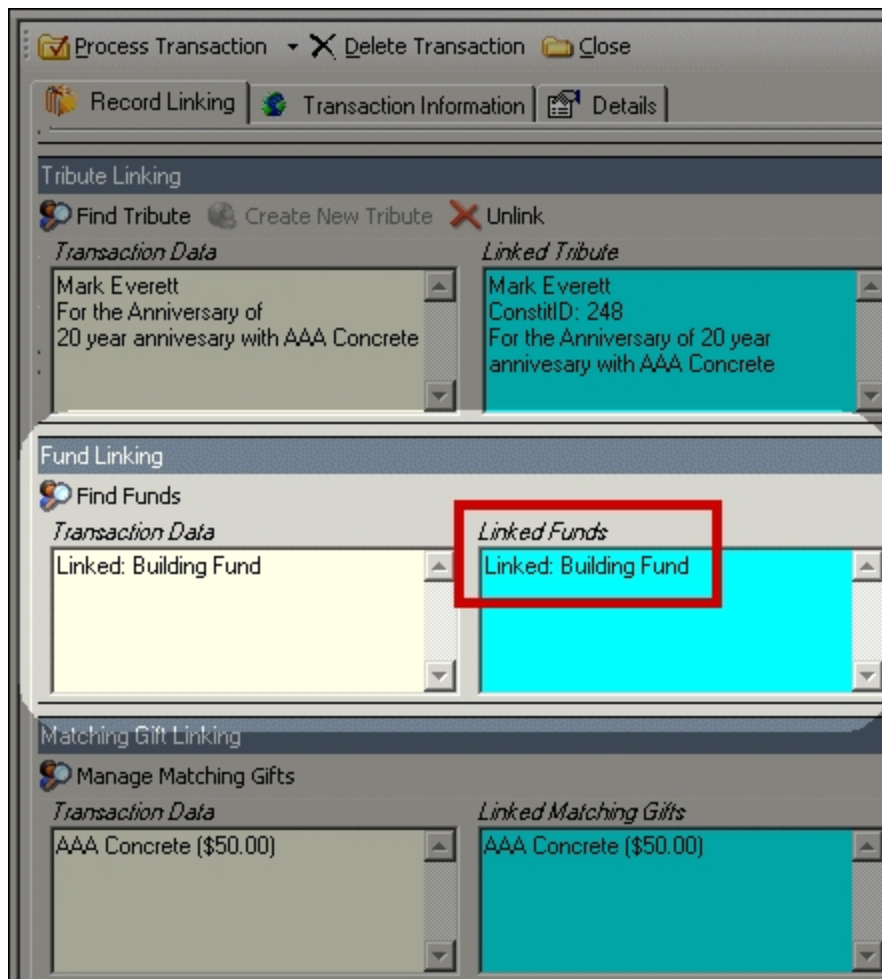
If the **Transaction Data** column lists multiple funds, the donor made a split gift. To view split gift details, click **Find Funds**. A Gift Fund Details screen appears with **Fund**, **Description**, and **Amount** information.

a.   If the fund is not matched, click **Find Funds** to search for an existing Raiser's Edge fund. The Gift Fund Details screen appears.

b.   In the **Fund** column, press **F7** on your keyboard. The Open screen appears.

c.   Search for the fund to link to the transaction. If the fund does not exist, click **Add New** to create a fund record in The Raiser's Edge.

d.   To return to the **Fund Linking** frame, click **OK**. Fund data from The Raiser's Edge appears in the **Linked Funds** box and a **Linked** indicator appears above the box.

10. If the donation is a direct debit transaction, the **Bank Linking** frame appears. In the **Transaction Data** box, view the bank information for the donation.

If there is a match for the bank the donor entered, a link is established to the Raiser's Edge bank in the **Linked Bank** box and a **Linked** indicator appears above the box.

Tip: Bank information downloads to the Relationship tab on the constituent record.

a. If the bank is not matched, click **Find Bank** to search for an existing Raiser's Edge bank. The search screen appears.

b. Search for the bank to link to the direct debit. If the bank does not exist, click **Add New** to create a bank in The Raiser's Edge.

c. To return to the **Bank Linking** frame, click **OK**. Bank data from The Raiser's Edge appears in the **Linked Bank** box. **Linked** appears above the box.

11. In the **Matching Gift Linking** frame, in the **Transaction Data** box, view matching gift information for the donation.

The program attempts to link the matching gift company name with an existing Raiser's Edge organization record. Due to potential data entry inconsistencies, make sure the correct company is in the **Transaction Data** box.

a.   Depending on how you add matching gifts to The Raiser's Edge, do one of the following to process the matching gift data from the website.

If the user did not enter a company, and if you are aware the user works for one, select a matching gift company. Click **Manage Matching Gifts**. On the Matching Gift Pledges screen, click **Add**.

If the company does not have an organization record in your Raiser's Edge database, create one.

If the donor entered a company name but you do not use MatchFinder Online, search to see if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears. To select a Matching Gift Company from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one.

Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, the **Add this company as an organization relationship for** checkbox enables. Select this to add the company as a relationship record for the donor. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

If a donor enters a company and you use MatchFinder Online, check if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears with additional features. To select the **Matching Gift Company** from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one. To access MatchFinder Online and review the company's matching information, click **Lookup**. Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, you can select to **Update this company with details from MatchFinder Online**. To add the company as a relationship record for the donor in The Raiser's Edge, select **Add this company as an organization relationship for**. To view the company's matching details from MatchFinder Online, click **Details**. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

b. To return to the **Matching Gift Linking** frame, click **OK**. **Linked** appears above the **Linked Matching Gifts** box. If you created a new record, an organization record has been created in The Raiser's Edge for the matching gift. For more information about matching gifts in The Raiser's Edge, see the The Raiser's Edge *Gift Records Guide*.

c. If the donor did not enter a company in the **Matching Gifts** section on your donation page, the **Matching Gift Pledges** frame appears. You can select a matching gift company if you are aware the donor works for one. To do this, click **Add**. If the company does not have an organization record in your Raiser's Edge database, you must create one.

d. To return to the **Matching Gift Linking** frame, click **OK**. **Linked** appears above the **Linked Matching Gifts** box. If you created a new record, an organization record has been created in The Raiser's Edge for the matching gift. For more information about matching gifts in The Raiser's Edge, see the The Raiser's Edge *Gift Records Guide*.

12. In the **Pledge Linking** frame, in the **Transaction Data** box, view the original pledge information for the selected pledge payment.
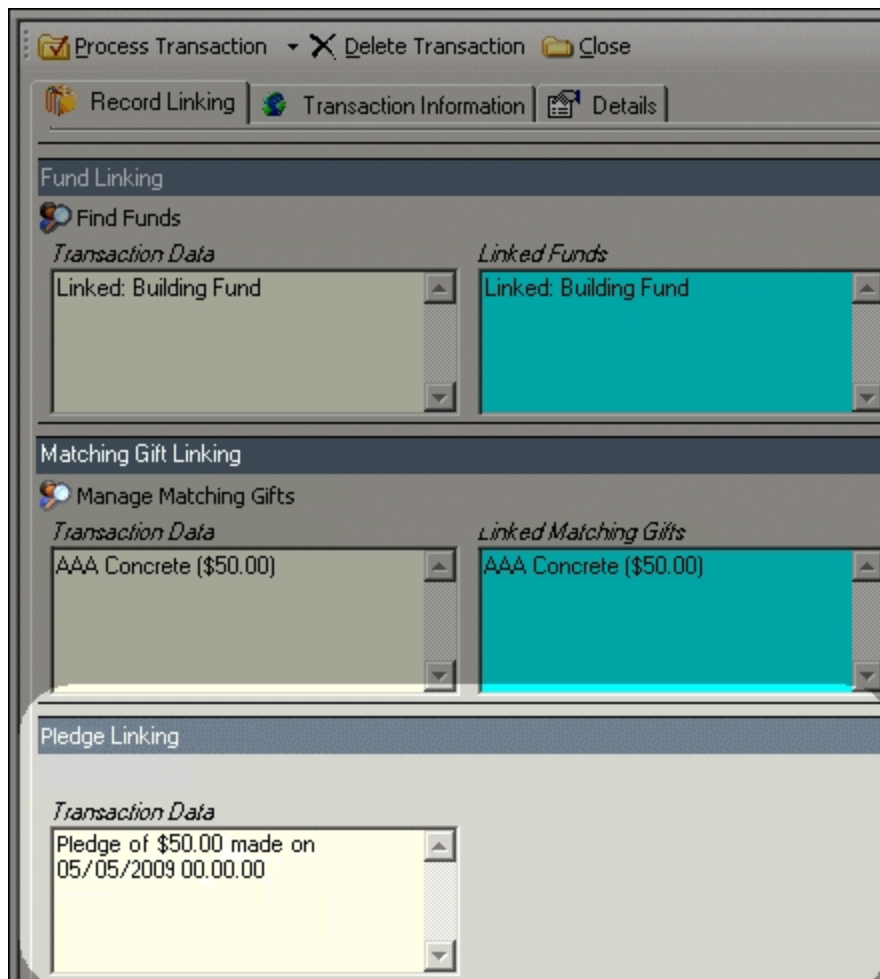
When a website user makes a pledge payment from the Transaction Manager part in Blackbaud NetCommunity, the program automatically links the payment to the selected pledge. For information about the Transaction Manager part, see the *Parts Guide*.

Note: You must access the pledge payment in *Batch* in The Raiser's Edge after you process the transactions to unlink the payment. For information about how to manage payment transactions in *Batch*, see The Raiser's Edge *Batch Guide*.

13. To view gift attribute information, select the Transaction Information tab. In the **Gift Attributes** frame, view attributes. For information about processing attributes, see Process attributes on page 20.
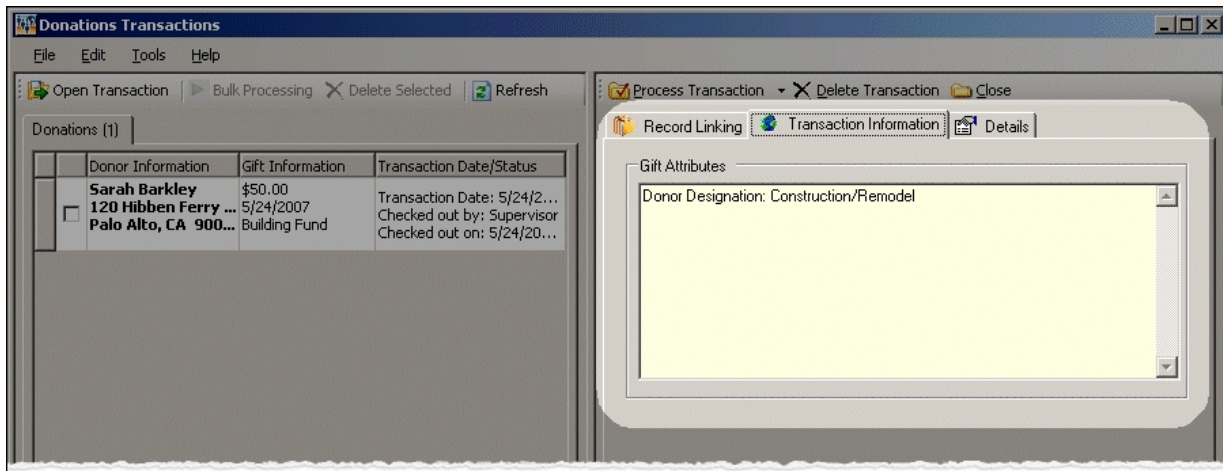
Tip: If this tab does not appear, the user did not select attributes on the donation page.

When you download a gift to The Raiser's Edge from Blackbaud NetCommunity, some gift attributes may add automatically to the gift record. These attributes include NetCommunity Comments, NetCommunity Corporate Donation Contact, NetCommunity Email Source, NetCommunity Email Source ID, NetCommunity Page, and NetCommunity Page ID. You do not view these gift attributes on the Transaction Information tab. After the gift is downloaded to The Raiser's Edge, you can view the information on the gift record.

14. To view origin information for the donation, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.

15. To download the donation, click **Process Transaction**.

To save your information but not process the transaction, click **Process Transaction**, **Save Changes**. You can process the transaction at another time.

The message "Batch # [ ] was created. Do you want to open the batch now?" appears.

Note: The batch number is determined by the selection from the **Tools**, **Transaction Options** menu. In Transaction Options, you can create a batch or use an existing batch for donations. For more information, see Assign a batch for transactions on page 18.

16. To view the gift in batch, click **Yes**. The batch screen appears. After you view the gift, to close the batch, click **Close**.

Note: You must commit a batch to process gifts to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

If you do not want to view the gift in the batch, click **No**.

17. You return to the Donations Transactions screen. To confirm the donation was included in the correct batch, view the **Current Batch Number** indicator in the lower left corner on the Donations Transactions screen.
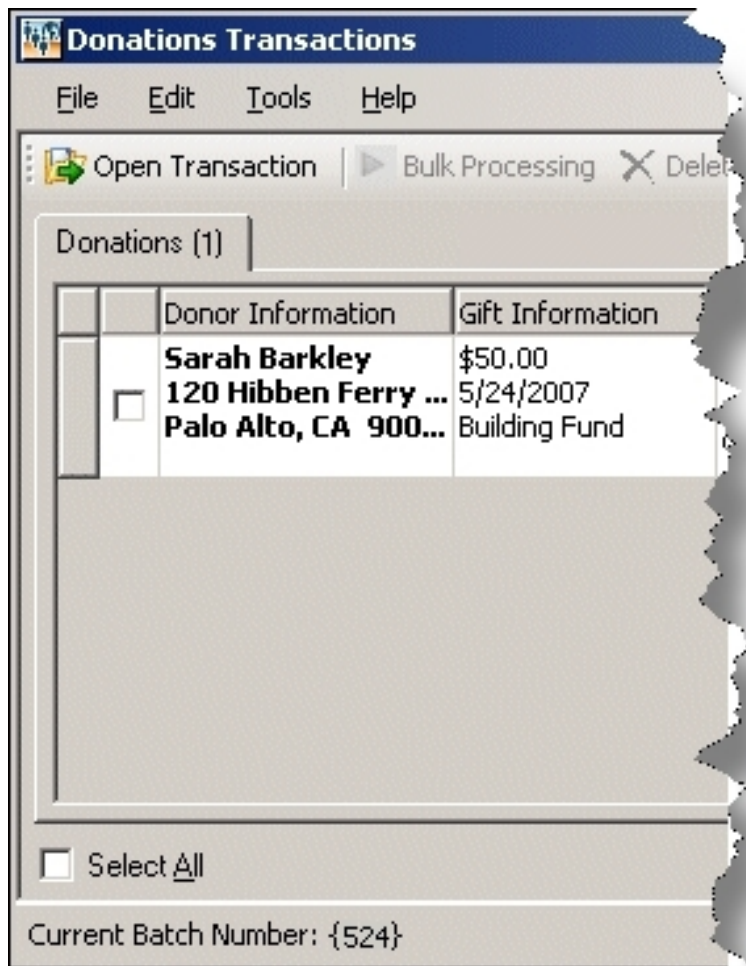
18. Repeat this procedure to process other individual transactions on the Donations Transactions screen.

Tip: To make sure you have the latest information from the website, click **Refresh**.

19. To delete a donation you do not want to process, select the row and click **Delete Transaction**.
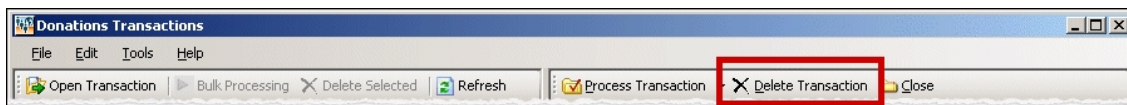
A confirmation message appears. Click **Yes**.

> Download donations - bulk process

When you use bulk process, you select to download all donors as new records in The Raiser's Edge and process every donation simultaneously. If you process everything, you may need to clean up data in The Raiser's Edge after processing completes.

1. From the NetCommunity page in The Raiser's Edge, click **Donations**. The Donations Transactions screen appears.

2. To process every transaction on the screen, select **Select All**. When you select this, a checkbox appears for every row. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

    To delete donations that you do not want to process, select the boxes beside the rows and click **Delete Selected**. A confirmation message appears. Click **Yes**.

3. Click **Bulk Processing**. The Process Online Donations screen appears.

4. On the Processing tab, review bulk properties such as **Transactions Selected** and **Successfully Checked Out**.

5. On the Options tab, select options for **Batch Number**, **Unlinked Records**, and **Transaction Profile Data** in the bulk process.
    a. In the **Batch Number** frame, select how to process the bulk donations to Raiser's Edge *Batch*.

        - To create a batch that uses the next available batch number in The Raiser's Edge, select **Use the next available batch number**.

        - To download the gifts to an existing batch in The Raiser's Edge, select **Add records to an existing batch**. Click the binoculars to select the existing batch. If the batch includes a default set, the values apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.

        - To load a default set of values from an existing batch for a new batch, select **Load fields and default values from an existing batch**. In the field below, click the binoculars to select the batch to load the default set from. Because you are selecting a default set for a new batch, you can select from a previously committed batch.

    b. In the **Unlinked Records** frame, to attempt constituent matching based on the options in **Constituent Matching**, select **Attempt auto-match to an existing record**. For more information, see

    c. To create a Raiser's Edge record for the donor, select **Create new Raiser's Edge record automatically**.

    d. To ignore Raiser's Edge required fields, select **Bypass required fields**. For more information, see

    e. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the donor. If you accept profile information, the data defaults to the constituent record in The Raiser's Edge.

- **Accept Profile Information** is selected by default for each bulk process. To reject information, you must select **Reject Profile Information** for each bulk process.

> *Warning:* Be aware if you reject data on the Donations Transactions screen and select **Accept Profile Information**, *all* data downloads to The Raiser's Edge. This includes partial data from a transaction (for example, an incorrect street address) and rejected transactions. If you reject data on the Donations Transactions screen, select **Reject Profile Information** to reject that data and download the remaining data to The Raiser's Edge.

6. When you finish, on the Process tab, click **Process Now**. Bulk processing begins.

7. When the process completes, the message "Batch # [ ] was created. Do you want to open the batch now?" appears.

8. Click **Yes**. The batch screen appears.

9. On the toolbar, click **Commit**. The Commit Gift Batch screen appears.

10. Click **Commit Now**. A summary screen appears.

> *Note:* You must commit a batch to process gifts to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

11. To close the batch, click **Close**. You return to the NetCommunity page in The Raiser's Edge, and gift information is updated in The Raiser's Edge.

Volunteer Requests

Volunteer Requests downloads information from the Volunteer Opportunity part on your website to The Raiser's Edge. Volunteer transaction data downloads to the Volunteer tab on a constituent record (if you use The Raiser's Edge Volunteer Management).

Before you process volunteer registrations, you should select options in NetCommunity Options in The Raiser's Edge on page 8. Specifically, you can apply Transaction Assignments on page 13 to volunteer registrations. Review that section before proceeding with this section.

There are two main ways to process Volunteer Requests — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the user with an existing Raiser's Edge record or add the user as a new record in the database.

- Bulk — You can select all users and process every transaction simultaneously. If you process all transactions, you may need to clean up data in The Raiser's Edge after processing completes.

▶ Download volunteers — single transaction process

When you use the single transaction process, you select each row individually to process volunteer registrations to The Raiser's Edge.

1. From the NetCommunity page in The Raiser's Edge, click **Volunteer Requests**. The Volunteer Requests Transactions screen appears.

2. On the Volunteer Requests Transactions tab, select the row to process by clicking in the **Volunteer Information** column. Volunteer tabs appear on the right.

> *Tip:* This tab is called Assigned Volunteer Requests Transactions when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.
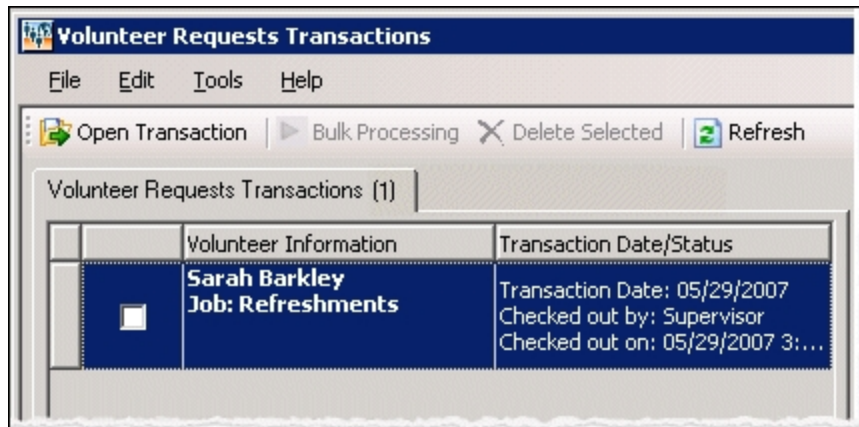
The **Transaction Date/Status** column on the Volunteer Requests Transactions tab defaults the date the user submitted the request on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out on** information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. On the Volunteer Information tab, review, edit (in the **Transaction Value** column), and process the volunteer data on the General tab. If the user submitted applicable information on the volunteer page, the Courses and Training, Special Needs, Job Assignments, and Checklist tabs also appear.
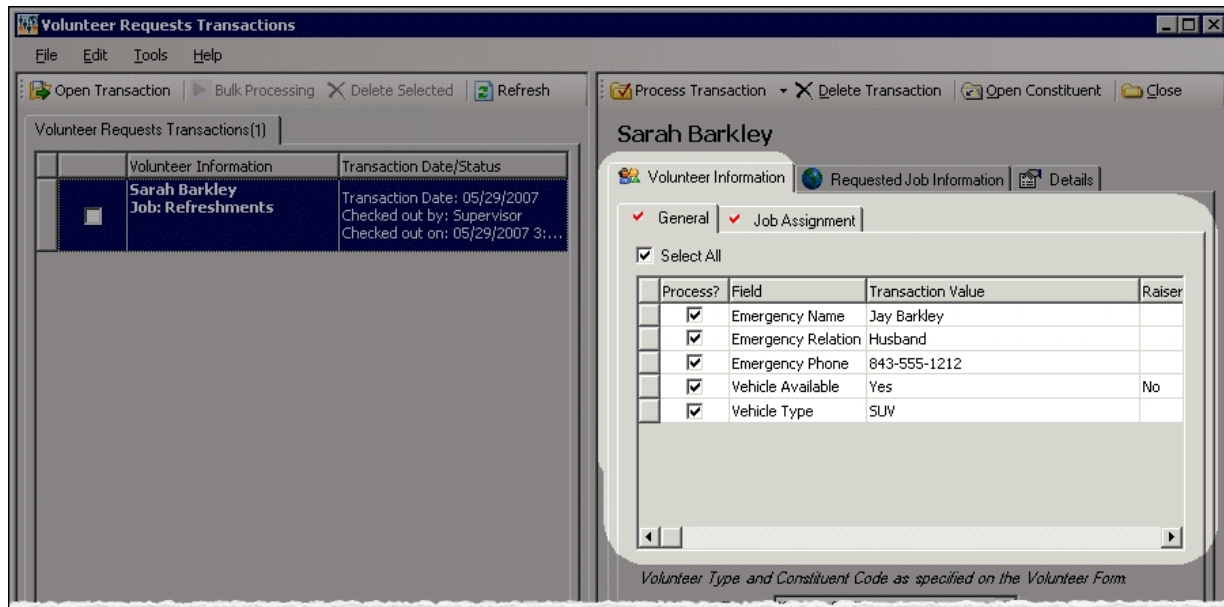
For information about including these tabs on the volunteer form on your website, see the *Parts Guide*. For information about volunteers in The Raiser's Edge, see The Raiser's Edge *Volunteer Management Guide*.

4. In the **Volunteer Type** field, the volunteer type selected on the part defaults in the field. You can change or remove the type for the transaction in this field.

5. In the **Constituent Code** field, the constituent code selected on the part defaults in the field. You can change or remove the constituent code for the transaction in this field.

6. To view a summary of the job request, click the Requested Job Information tab. Information on this tab includes information such as the **Name**, **Category**, and **Description** of the job request.
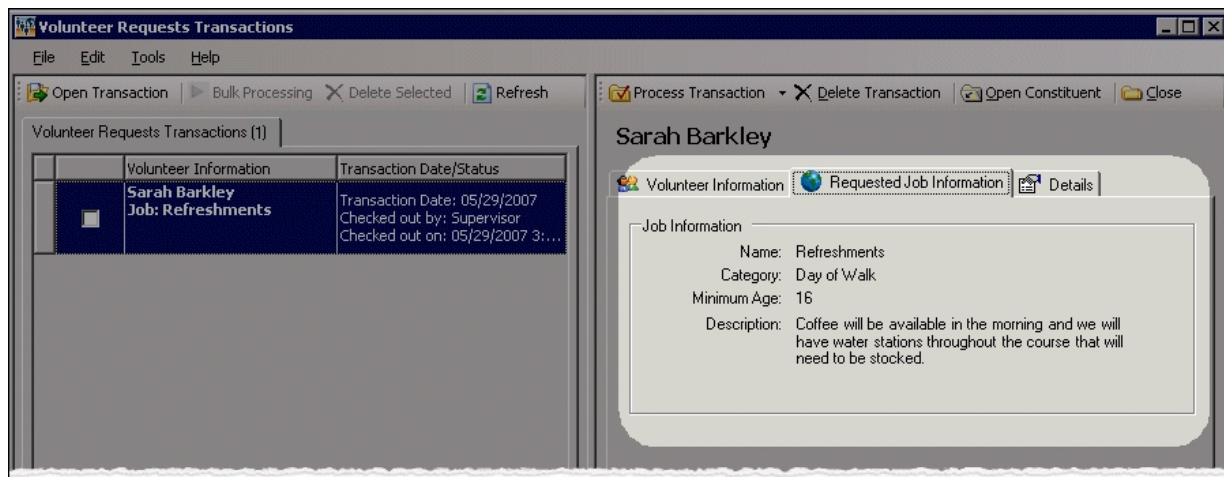
7. To view origin information for the volunteer, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
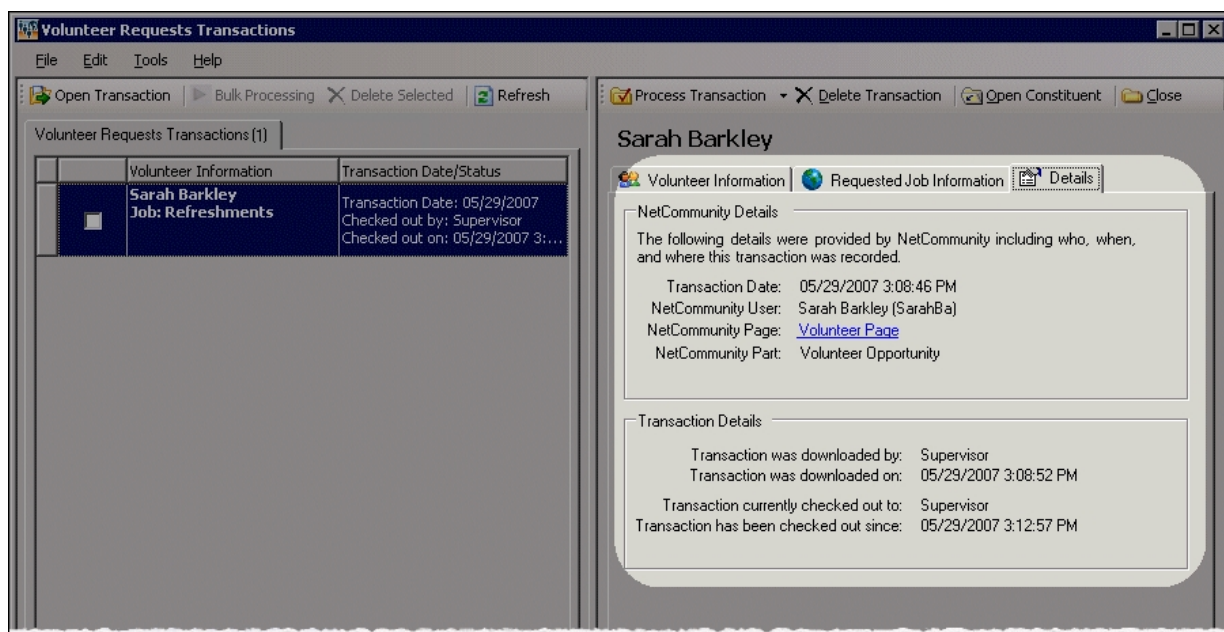
8. To process the selected volunteer registrations, click **Process Transaction**.
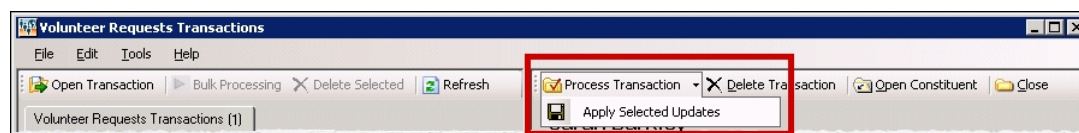
To partially process a transaction, click **Process Transaction**, **Apply Selected Updates**. A partially processed transaction includes the changes that you selected **Process** for. If another

registration for the volunteer downloads to Volunteer Requests, data can be overwritten by the second registration.

9. Repeat this procedure to individually process the remaining volunteer requests on this screen.

Tip: To make sure you have the latest information from the website, click **Refresh**.

10. When you finish, click **Close**. You return to the NetCommunity page in The Raiser's Edge.

> ### Download volunteer requests — bulk process

When you use bulk process, you select to process every volunteer registration simultaneously. If you process everything, you need to clean up data in The Raiser's Edge after processing completes.

1. From the NetCommunity page in The Raiser's Edge, click **Volunteer Requests**. The Volunteer Requests Transactions screen appears.

Tip: To make sure you have the latest information from the website, click **Refresh**.

2. To process every transaction on the screen, select **Select All**. When you select this, every row appears with a checkbox. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

3. Click **Bulk Processing**. The Process Online Volunteer Requests screen appears.

4. On the Processing tab, review bulk properties such as **Transactions Selected** and **Successfully Checked Out**.

5. When you finish, click **Process Now**. Bulk processing begins.

6. When the process is complete, click **Close** on the Process Online Volunteer Requests screen. You return to the Volunteer Requests Transactions screen.

7. Click **Close**. You return to the NetCommunity page in The Raiser's Edge.

Event Registrations

Before you process event registrations, you should select options in NetCommunity Options in The Raiser's Edge on page 8. Specifically, you can apply Transaction Assignments on page 13 to event registrations. Review that section before proceeding with this section.

When a constituent, member, or alumnus(a) registers for an event on the website you download the information from Blackbaud NetCommunity to The Raiser's Edge. A transaction for The Raiser's Edge updates event and participant records.

Event registrations with a gift, such as an event fee, create a batch in The Raiser's Edge. You can create a batch or use an existing batch to process gifts. For more information, see Assign a batch for transactions on page 18.

There are two main ways to process Event Registrations — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the registrant with an existing Raiser's Edge record or add the registrant as a new record in the database.

- Bulk — You can select all registrants and process every transaction simultaneously. If you process all registrants, you may need to clean up data in The Raiser's Edge after processing completes.

When you process transactions, you must make decisions beyond using the single or bulk process. For example, you may want to create a batch in The Raiser's Edge to specifically use for event registration donations from Blackbaud NetCommunity. Or you may want to create the batch in the Event Registrations transaction. Review the following diagram for an example of one way to process event registration donations. Before you begin regularly processing transactions, a best practice decision should be made for your organization.
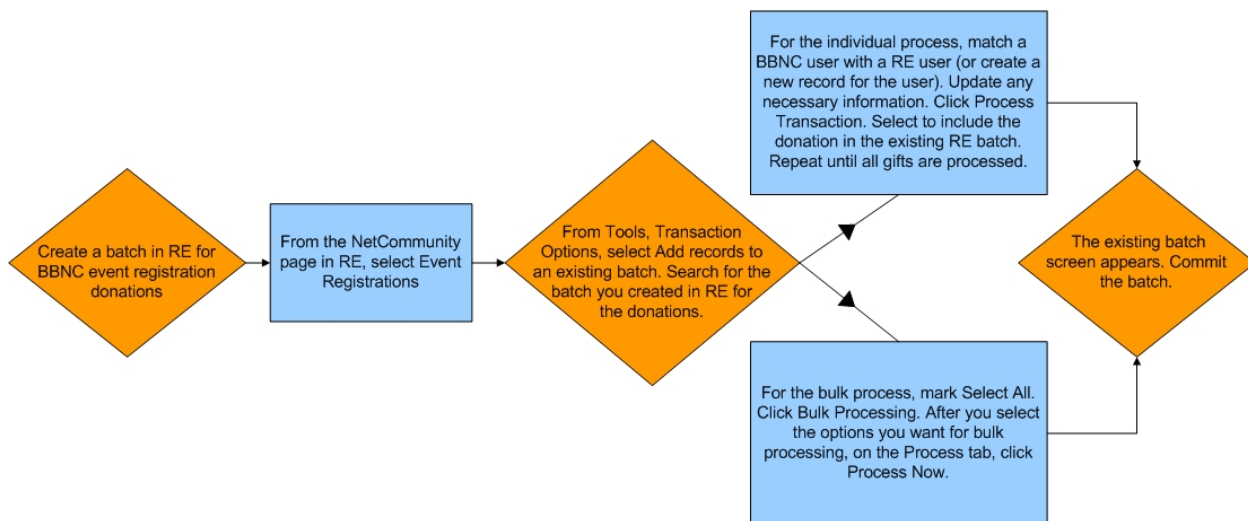
> Download event registrations - single transaction process

When you use the single transaction process, you select each row individually to match the registrant with an existing Raiser's Edge record or add the registrant as a new record in the database. Follow the steps in this procedure to process transactions for the Event Registration Form part. For more information about this part, see the *Parts Guide*.

1. From the NetCommunity page in The Raiser's Edge, click **Event Registrations**. The Event Registrations Transactions screen appears.

Note: Event Registration transactions create a gift batch in The Raiser's Edge. From **Tools**, **Transaction Options**, you can select batch options before you process a registration. The batch screen does not appear until you process the registration. For more information, see Step 10 in this procedure and Assign a batch for transactions on page 18.

2. On the Event Registrations Transactions tab, select the row to process by clicking in the **Donor Information** column. The **Constituent Linking** frame appears on the right and defaults to the Record Linking tab.

Tip: This tab is called Assigned Event Registrations Transactions when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.

The **Gift Information** column displays the donation amount, the gift date, fund, and source (or appeal). If you support multiple currency types, review the following.

- If a gift amount has been converted to your local currency, the converted amount displays in "( )" in the **Gift Information** column.

- Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see .

- Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see the Blackbaud NetCommunity *Administration Guide*.

- In Blackbaud NetCommunity *Administration*, add an IATS merchant account for each currency type.

The **Transaction Date/Status** column on the Event Registrations Transactions tab defaults the date the user submitted the donation on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out on** information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. In the **Constituent Linking** frame on the right, data from Blackbaud NetCommunity appears in the **Transaction Data** box. If your **Constituent Matching** options match a Raiser's Edge record, Raiser's Edge data appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the Raiser's Edge record for the user, click **Open Constituent**.

Tip: If duplicate records are found {Duplicates Found} appears in the **RE Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

If you are sure the website user is the matched Raiser's Edge constituent and do not need to change the transaction, proceed to the **Transaction Constituent Code** step. If the records in the **Constituent Linking** frame match and you want to review or make changes to the transaction, click **Find Constituent** above the **Transaction Data** box. A screen appears to view additional data the user submitted on your site.

If the **Linked Constituent** box is blank, you must link the website user with an existing Raiser's Edge record or create a record for the user.

4. To search for an existing Raiser's Edge constituent, click **Find Constituent**.

Tip: If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

A NetCommunity Transaction screen appears.

a. If the user entered information in the applicable section on the event registration form, the Biographical, Preferred Address, and Primary Business tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b. To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c. To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, if you select this checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f. If a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

Note: If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

> If an existing record does not match the donor, click **Link Constituent**, **Create New Constituent**. For information about creating new constituents, see the next step.

5. To create a record in The Raiser's Edge, click **Create New**, **Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box. A record has been created in The Raiser's Edge for the user.

a. To edit data the website user entered, click **Create New**, **Create New and Edit**. A screen appears to compare existing Raiser's Edge data with the donor information. If the user entered information in the applicable section of the event registration form, the

Biographical, Preferred Address, and Primary Business tabs appear. You can process each tab individually or all at one time.

b. For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge.

c. Information provided by the user during the donation appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

d. Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

6. In the **Transaction Constituent Code** frame, the constituent code selected on the part appears in the field. You can change or remove the constituent code in this field. This

constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

If the constituent codes in the **Transaction Constituent Code** frame and the **New Constituents** option are the same, the constituent codes do not duplicate on the Bio 2 tab. If the constituent codes are different, both codes download to the constituent record. For more information about the option, see New Constituents on page 10.

7. In the **Organization Linking** frame, in the **Transaction Data** box, view organization information for a corporate gift.

Note: The **Organization Linking** frame appears only if the donation is a corporate gift.

a. To search for an existing Raiser's Edge organization record, click **Find Organization**.

b. To create an organization record in The Raiser's Edge, click **Create New**. An **Auto-matched** indicator appears above the **Linked Organization** box. A record has been created in The Raiser's Edge for the organization.

c. To link the new record, click **Open Linked**. The organization record appears in The Raiser's Edge. On the Raiser's Edge toolbar, click **Save and Close**. You return to the **Organization Linking** frame. **Linked** appears above the **Linked Organization** box.

8. To view origin information for the event registration, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
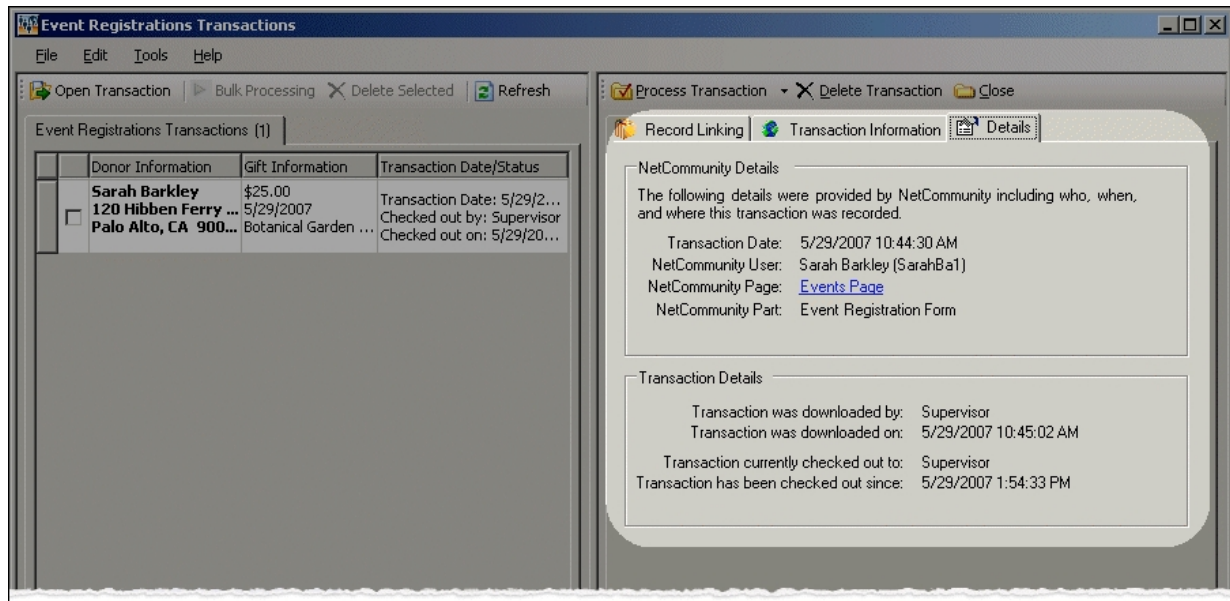
Tip: When you download an event registration to The Raiser's Edge from Blackbaud NetCommunity, the Online registrant? participant attribute adds automatically to the participant record. You do not view this attribute on the Event Registrations Transactions screen. After the event registration downloads to The Raiser's Edge, you can view the information on the participant record. Online registrant? appears in the **Category** column, Yes appears in the **Description** column, and NetCommunity appears in the **Comments** column.

9. To process the registration, click **Process Transaction**.

   To save your information but not process the transaction, click **Process Transaction**, **Save Changes**. You can process the transaction at another time.

   The message "Batch # [ ] was created. Do you want to open the batch now?" appears.

Note: The batch number is determined by the selection from the **Tools**, **Transaction Options** menu. In Transaction Options, you can create a batch or use an existing batch for donations. For more information, see .

10. To view the gift in batch, click **Yes**. The batch screen appears. After you view the gift, to close the batch, click **Close**.

Note: You must commit a batch to process gifts to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

If you do not want to view the gift in the batch, click **No**.

11. You return to the Event Registrations Transactions screen. To confirm the gift was included in the correct batch, view the **Current Batch Number** indicator in the lower left corner on the Event Registrations Transactions screen.
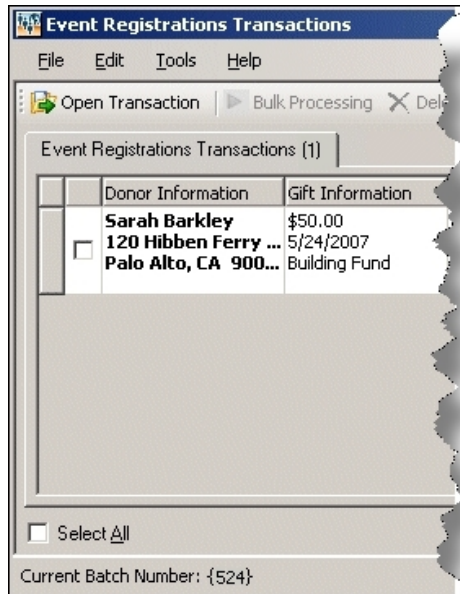
12. Repeat this procedure to process other individual transactions on the Event Registrations Transactions screen.

Tip: To make sure you have the latest information from the website, click **Refresh**.

13. To delete a registration you do not want to process, select the row and click **Delete Transaction**.

A confirmation message appears. Click **Yes**.

❯ Download event registrations (classic)- single transaction process

When you use the single transaction process, you select each row individually to match the registrant with an existing Raiser's Edge record or add the registrant as a new record in the database. Follow the steps in this procedure to process transactions for the Event Registration Form (Classic) part. For more information about this part, see the *Parts Guide*.

1. From the NetCommunity page in The Raiser's Edge, click **Event Registrations**. The Event Registrations Transactions screen appears.

Note: Event Registration transactions create a gift batch in The Raiser's Edge. From **Tools**, **Transaction Options**, you can select batch options before you process a registration. The batch screen does not appear until you process the registration. For more information, see Step 10 in this procedure and Assign a batch for transactions on page 18.

2. On the Event Registrations Transactions tab, select the row to process by clicking in the **Donor Information** column. The **Constituent Linking** frame appears on the right and defaults to the Record Linking tab.

Tip: This tab is called Assigned Event Registrations Transactions when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.

The **Gift Information** column displays the donation amount, the gift date, fund, and source (or appeal). If you support multiple currency types, review the following.

• If a gift amount has been converted to your local currency, the converted amount displays in "( )" in the **Gift Information** column.

• Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see Currency Configuration on page 10.

• Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see the Blackbaud NetCommunity *Administration Guide*.

• In Blackbaud NetCommunity *Administration*, add an IATS merchant account for each currency type.

The **Transaction Date/Status** column on the Event Registrations Transactions tab defaults the date the user submitted the donation on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and

Checked out on information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. In the **Constituent Linking** frame on the right, data from Blackbaud NetCommunity appears in the **Transaction Data** box. If your **Constituent Matching** options match a Raiser's Edge record, Raiser's Edge data appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the Raiser's Edge record for the user, click **Open Constituent**.

Tip: If duplicate records are found {Duplicates Found} appears in the **RE Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

If you are sure the website user is the matched Raiser's Edge constituent and do not need to change the transaction, proceed to the **Transaction Constituent Code** step. If the records in the **Constituent Linking** frame match and you want to review or make changes to the transaction, click **Find Constituent** above the **Transaction Data** box. A screen appears to view additional data the user submitted on your site.

If the **Linked Constituent** box is blank, you must link the website user with an existing Raiser's Edge record or create a record for the user.

4. To search for an existing Raiser's Edge constituent, click **Find Constituent**.

Tip: If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

A NetCommunity Transaction screen appears.

a. If the user entered information in the applicable section on the event registration form, the Biographical, Preferred Address, and Primary Business tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b. To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c. To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, if you select this checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e.   To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f.   If a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

Note: If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

If an existing record does not match the donor, click **Link Constituent**, **Create New Constituent**. For information about creating new constituents, see the next step.

5. To create a record in The Raiser's Edge, click **Create New**, **Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box. A record has been created in The Raiser's Edge for the user.

a. To edit data the website user entered, click **Create New**, **Create New and Edit**. A screen appears to compare existing Raiser's Edge data with the donor information. If the user entered information in the applicable section of the event registration form, the

Biographical, Preferred Address, and Primary Business tabs appear. You can process each tab individually or all at one time.

b. For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge.

c. Information provided by the user during the donation appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

d. Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

6. In the **Transaction Constituent Code** frame, the constituent code selected on the part appears in the field. You can change or remove the constituent code in this field. This

constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

> If the constituent codes in the **Transaction Constituent Code** frame and the **New Constituents** option are the same, the constituent codes do not duplicate on the Bio 2 tab. If the constituent codes are different, both codes download to the constituent record. For more information about the option, see .

7. In the **Matching Gift Linking** frame, in the **Transaction Data** box, view matching gift information for the donation.

> The program attempts to link the matching gift company name with an existing Raiser's Edge organization record. Due to potential data entry inconsistencies, make sure the correct company is in the **Transaction Data** box.

a. Depending on how you add matching gifts to The Raiser's Edge, do one of the following to process the matching gift data from the website.

> If the user did not enter a company, and if you are aware the user works for one, select a matching gift company. Click **Manage Matching Gifts**. On the Matching Gift Pledges screen, click **Add**.

If the company does not have an organization record in your Raiser's Edge database, create one.

If the donor entered a company name but you do not use MatchFinder Online, search to see if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears. To select a Matching Gift Company from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one.

Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, the **Add this company as an organization relationship for** checkbox enables. Select this to add the company as a relationship record for the donor. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

If a donor enters a company and you use MatchFinder Online, check if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears with additional features. To select the **Matching Gift Company** from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one. To access MatchFinder Online and review the company's matching information, click **Lookup**. Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, you can select to **Update this company with details from MatchFinder Online**. To add the company as a relationship record for the donor in The Raiser's Edge, select **Add this company as an organization relationship for**. To view the company's matching details from MatchFinder Online, click **Details**. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

b. To return to the **Matching Gift Linking** frame, click **OK**. **Linked** appears above the **Linked Matching Gifts** box. If you created a new record, an organization record has been created in The Raiser's Edge for the matching gift. For more information about matching gifts in The Raiser's Edge, see the The Raiser's Edge *Gift Records Guide*.

c. If the donor did not enter a company in the **Matching Gifts** section on your donation page, the **Matching Gift Pledges** frame appears. You can select a matching gift company if you are aware the donor works for one. To do this, click **Add**. If the company does not have an organization record in your Raiser's Edge database, you must create one.

d. To return to the **Matching Gift Linking** frame, click **OK**. **Linked** appears above the **Linked Matching Gifts** box. If you created a new record, an organization record has been created in The Raiser's Edge for the matching gift. For more information about matching gifts in The Raiser's Edge, see the The Raiser's Edge *Gift Records Guide*.

8. To view event attribute information, select the Transaction Information tab. In the **Gift Attributes** frame, view attributes. In the **Event Participant Information** frame, view the event that the participant registered for and participant attributes. For information about processing attributes, see Process attributes on page 20.
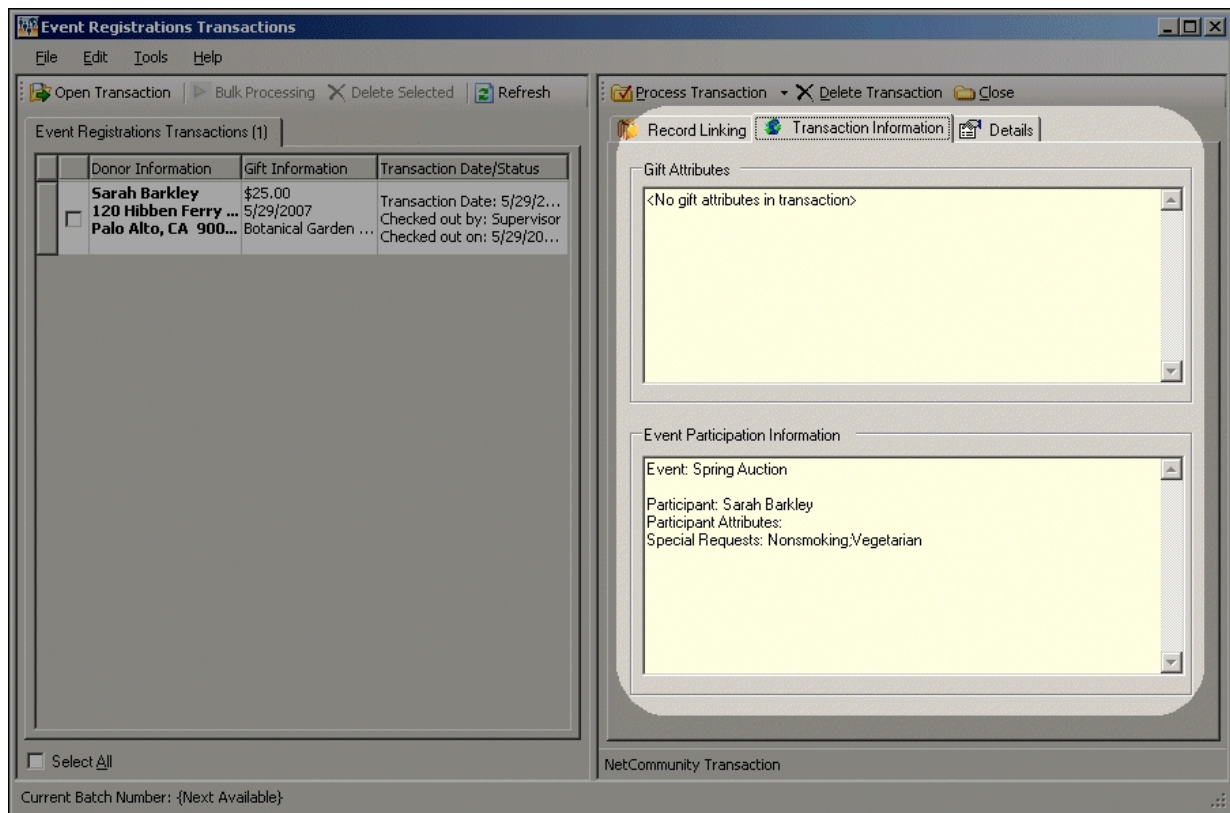
When you download an event registration to The Raiser's Edge from Blackbaud NetCommunity, the Online registrant? participant attribute adds automatically to the participant record. You do not view this attribute on the Transaction Information tab. After the event registration downloads to The Raiser's Edge, you can view the information on the participant record. Online registrant? appears in the **Category** column, Yes appears in the **Description** column, and NetCommunity appears in the **Comments** column.

9. To view origin information for the event registration, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
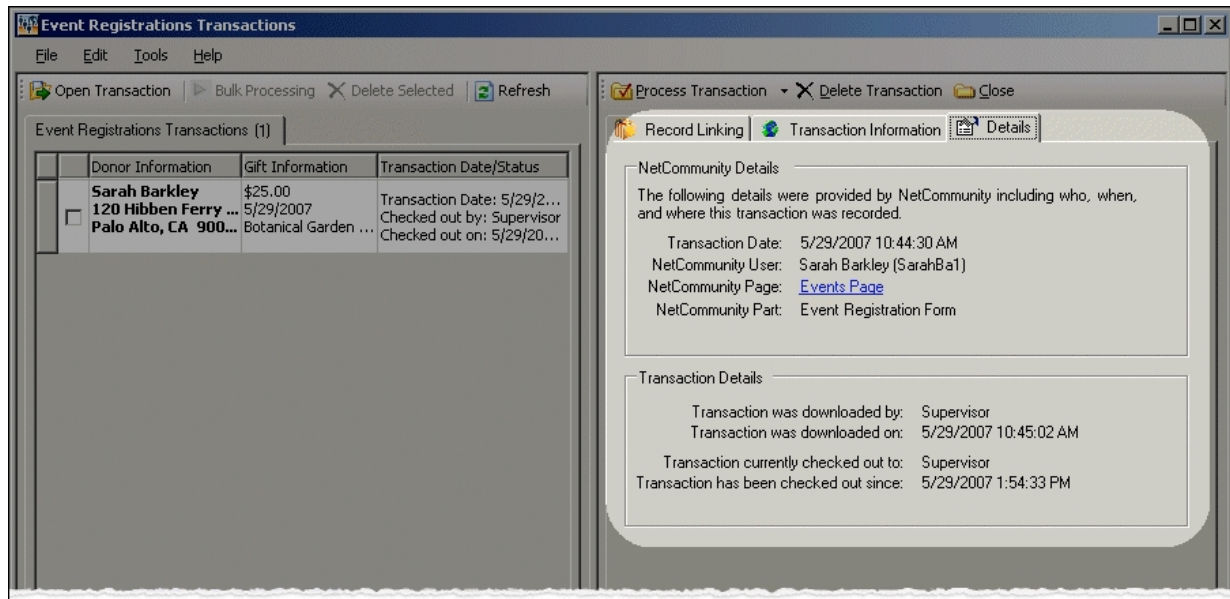
10. To process the registration, click **Process Transaction**.

    To save your information but not process the transaction, click **Process Transaction**, **Save Changes**. You can process the transaction at another time.
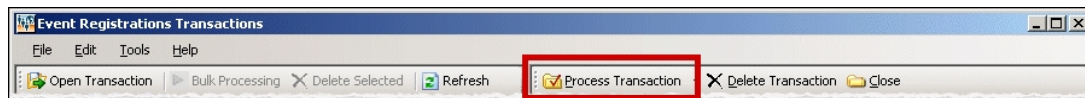
    The message "Batch # [ ] was created. Do you want to open the batch now?" appears.

Note: The batch number is determined by the selection from the **Tools**, **Transaction Options** menu. In Transaction Options, you can create a batch or use an existing batch for donations. For more information, see Assign a batch for transactions on page 18.

11. To view the gift in batch, click **Yes**. The batch screen appears. After you view the gift, to close the batch, click **Close**.

Note: You must commit a batch to process gifts to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

    If you do not want to view the gift in the batch, click **No**.

12. You return to the Event Registrations Transactions screen. To confirm the gift was included in the correct batch, view the **Current Batch Number** indicator in the lower left corner on the Event Registrations Transactions screen.

13. Repeat this procedure to process other individual transactions on the Event Registrations Transactions screen.

Tip: To make sure you have the latest information from the website, click **Refresh**.

14. To delete a registration you do not want to process, select the row and click **Delete Transaction**.
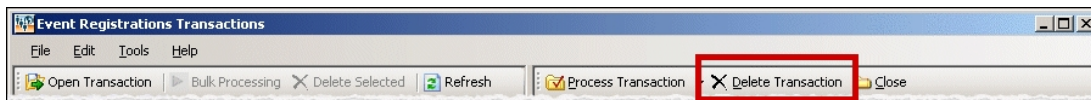
A confirmation message appears. Click **Yes**.

> Download event registrations - bulk process

When you use bulk process, you select to download all registrants as new records in The Raiser's Edge and process every registration simultaneously. If you process everything, you may need to clean up data in The Raiser's Edge after processing completes.

1. From the NetCommunity page in The Raiser's Edge, click **Event Registrations**. The Event Registrations Transactions screen appears.

Tip: To make sure you have the latest information from the website, click **Refresh**.

2. To process every transaction on the screen, select **Select All**. When you select this, a checkbox appears for every row. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

   To delete registrations that you do not want to process, select the boxes beside the rows and click **Delete Selected**. A confirmation message appears. Click **Yes**.

3. Click **Bulk Processing**. The Process Online Event Registrations screen appears.

4. On the Processing tab, review bulk properties such as **Transactions Selected** and **Successfully Checked Out**.

5. On the Options tab, select options for **Batch Number**, **Unlinked Records**, and **Transaction Profile Data** in the bulk process.

   a. In the **Batch Number** frame, select how to process the bulk donations to Raiser's Edge *Batch*.

   • To create a batch that uses the next available batch number in The Raiser's Edge, select **Use the next available batch number**.

Note: These batch options also appear from the **Tools**, **Transaction Options** menu. For more information, see Assign a batch for transactions on page 18.

   • To download the gifts to an existing batch in The Raiser's Edge, select **Add records to an existing batch**. Click the binoculars to select the existing batch. If the batch includes a default set, the values apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.

   • To load a default set of values from an existing batch for a new batch, select **Load fields and default values from an existing batch**. In the field below, click the binoculars to select the batch to load the default set from. Because you are selecting a default set for a new batch, you can select from a previously committed batch.

   a. To create a query of participants in this bulk process, select **Create participant query**. We recommend creating a query of processed transactions for your records. The query appears in The Raiser's Edge Query.

   b. In the **Unlinked Records** frame, to attempt constituent matching based on the options in **Constituent Matching**, select **Attempt auto-match to an existing record**. For more information, see Constituent Matching on page 13.

   c. To create a Raiser's Edge record for the donor, select **Create new Raiser's Edge record automatically**.

   d. To ignore Raiser's Edge required fields, select **Bypass required fields**. For more information, see Required Fields in The Raiser's Edge on page 16.

   e. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the donor. If you accept profile information, the data defaults to the constituent record in The Raiser's Edge.

   Accept Profile Information is selected by default for each bulk process. To reject information, you must select **Reject Profile Information** for each bulk process.

Warning: Be aware if you reject data on the Event Registrations Transactions screen and select **Accept Profile Information**, *all* data downloads to The Raiser's Edge. This includes partial data from a transaction (for example, an incorrect street address) and rejected transactions. If you reject data on the Event Registrations Transactions screen, select **Reject Profile Information** to reject that data and download the remaining data to The Raiser's Edge.

6. When you finish, on the Process tab, click **Process Now**. Bulk processing begins.

7. When the process completes, the message "Batch # [ ] was created. Do you want to open the batch now?" appears.

Note: You can assign a batch number to the bulk process. For more information, see Assign a batch for transactions on page 18.

8. Click **Yes**. The batch screen appears.

9. On the toolbar, click **Commit**. The Commit Gift Batch screen appears.

10. Click **Commit Now**. A summary screen appears.

11. To close the batch, click **Close**. You return to the NetCommunity page in The Raiser's Edge. Information is updated in The Raiser's Edge.

Note: You must commit a batch to process gifts to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

12. Click **Close**. You return to the NetCommunity page in The Raiser's Edge.

Polls

You can store responses to a poll on your website as an attribute on the Attributes tab of a constituent record in The Raiser's Edge.

> **Download poll responses**

1. From the NetCommunity page in The Raiser's Edge, click **Polls**. The Poll Updates screen appears.

2. In the **Poll** field, select the poll to process.

   In the **Poll Summary** frame, poll questions and response percentages appear.

   In the middle of the screen, a **Constituent attribute** field appears. If this is the first time you are downloading this poll's responses, enter a new attribute in the field. This creates a new attribute in The Raiser's Edge. You cannot select an existing attribute.

   After the poll results have been downloaded and an attribute defined, the next time you download poll results, the associated attribute appears in the **This poll is associated with the following attribute** field. You cannot make changes to the attribute.

   After the download process is complete, you can find a constituent's response to a poll by looking for the attribute on the Attributes tab of the constituent record.

3. At the bottom of the screen, check the **Poll Details** frame.

   a. If there are no new responses for the selected poll, it says **No new responses**. You can either proceed to the last step in this procedure or select another poll in the **Poll** field to check results.

b. The **Poll Details** frame indicates whether you have new responses to the selected poll. To process responses, click **Process**. A message appears notifying you of the number of new responses processed.

4. Click **Close**. You return to the NetCommunity page in The Raiser's Edge. The poll response appears on the Attributes tab of the respondent's constituent record.

Class Notes

Note: The Alumni Class Notes part will be replaced with the more powerful Personal Notes part in an upcoming release. Therefore, class note transactions only appear on the NetCommunity page when a new transaction exists to process. If a new transaction does not exist, the Class Notes category does not appear on the page. This is still true when "All Transaction Categories" is selected in the **View** field.

Alumni add notes to their class notes page on your website to keep in touch with one another and update classmates on their lives. When alumni add information to a class notes page and it is approved, you are notified in **Class Notes** on the NetCommunity page in The Raiser's Edge. You can download this information to a notepad in The Raiser's Edge. For example, an alumnus mentions in his class notes he got a new dog. If you store class note updates, you create a note on the Notes tab of his constituent record. Keeping track of constituent class notes is another way to know your donors better.

Before downloading class notes, you should select download options for class notes in Class Note Processing on page 10. Review that section before proceeding with this procedure.

> **Download class note updates**

If you select **Require Approval** when creating the Class Notes part, users with edit rights must approve class notes on the web page before they can be viewed or downloaded.

1. From the NetCommunity page in The Raiser's Edge, click **Class Notes**. The Class Notes screen appears.

2. Review the processing information. For example, if you have a new class note, "1 class note update(s) processed" appears. Because class notes are approved in Blackbaud NetCommunity, class note information downloads to The Raiser's Edge automatically. No further action is required to download the class note. Class notes are stored on the Notes tab of a constituent record.

Advocacy Actions

With Blackbaud NetAdvocacy, you can download advocacy action data to The Raiser's Edge. This data includes alerts, email information, and attributes (if there is a source email). Before you process advocacy transactions, you should select options in Connection Settings on page 9 and Advocacy on page 14. In addition, you can apply Transaction Assignments on page 13 to advocacy transactions. Review that section before proceeding with this section.

There are two main ways to process Advocacy Actions — single and bulk. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the user with an existing Raiser's Edge record or add the user as a new record in the database.

- Bulk — You can select all users and process every transaction simultaneously. If you process all transactions, you may need to clean up data in The Raiser's Edge after processing completes.

The number of actions that process to The Raiser's Edge constituent record equals the number of email recipients. For example, if John Smith sends an advocacy email to Senator James Mahan and Senator Marianne Jones, two action records are added to John Smith's constituent record. These action records in The Raiser's Edge contain the **Message ID** number and **Delivery method** created when a user sends an advocacy alert. Examples of a delivery method includes mail, email, or fax. Both direct action alert email and tell-a-friend email download to The Raiser's Edge.

For information about advocacy data field mapping, see Advocacy Actions Field Mapping on page 102.

> **Download advocacies**

1. From the NetCommunity page in The Raiser's Edge, click **Advocacy Actions**. The Advocacy Transactions screen appears.

2. Names appear in a grid with the checkbox selected in the **Process Now** column. Clear the checkbox next to any names you do not want to process in The Raiser's Edge.

3. The **RE Constituent** column lists Raiser's Edge constituent information. The **Advocate information** column includes information from the website. If the advocate was logged into the website when the advocacy was submitted, his constituent record information appears in the **RE Constituent** column. If information does not appear, you must manually link the data in the **Advocate information** column to the data in the **RE Constituent** column by finding the existing constituent record in The Raiser's Edge or creating a new record for a new constituent.

Tip: If duplicate records are found {Duplicates Found} appears in the **RE Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

4. If there is no constituent information in the **RE Constituent** column, press **F7** on your keyboard in the **RE Constituent** column. A transaction screen appears.

    a. If the user entered the applicable section on the membership form, the Biographical and Preferred Address tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

Note: We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b.   To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c.   To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d.   To search by exact criteria, select **Exact match only**. For example, if you select this checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e.   To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f.   If a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

Note: If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

g.   If an existing record does not match the advocate, click **Link Constituent**, **Create New Constituent**.

h.   For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not process to The Raiser's Edge.

i.   Information provided by the user during the advocacy action appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

j.   Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **RE Constituent** column.

5.   In the **Action taken** column, review the details of the email sent by the website user. The column contains information about the email such as the alert title, date, and subject.

6.   In the **Recipients** column, you can view the name and number of email recipients. For example, you may view your state senator's name or town council member names in this column.

Blackbaud NetAdvocacy email recipient names are stored in the action record **Recipient Name** field.

7. Next, you can assign an issue to the advocate using the **Issue** column on the Advocacy Transactions screen.

   In the **Issue** column, click the drop-down arrow and select the issue associated with the advocate. Options available in the **Issue** column depend on information entered in the **Issue table** in The Raiser's Edge. The options are also tied to the "alert ID" in *Capwiz*, so when an issue is selected, all records with the same "alert ID" are automatically associated with the same issue. However, you can manually change any issue.

   For more information about the **Issue table**, see The Raiser's Edge *Configuration & Security Guide*.

8. To process every transaction on the screen in bulk, select **Select All**. When you select this, every row appears with a checkbox. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

9. To create an action query of the processed action transactions, select **Create a query of action records added**. We recommend creating a query of processed transactions for your records. The query appears in The Raiser's Edge query.

10. To create a constituent record for transactions not linked to an existing record, select **Create a new constituent for unlinked transactions**.

11. In the **Default Issue** field, you can select an issue to apply to all transactions.

12. Under **Profile Data**, select one of the following options.

   • To receive a message that asks whether to process profile transactions, select **Prompt**. When you select this, a screen appears to compare existing Raiser's Edge data with the user advocacy information. If the user entered information in the applicable section, the Biographical and Preferred Address tabs appear. Information provided by the user appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

   For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge. After you are done, click **Save and Close**. The screen closes and you return to the NetCommunity page in The Raiser's Edge. If another profile transaction exists, the profile message appears again.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

   • To download *all* profile data to constituent records, select **Auto-update**. This applies to existing and new constituent records.

   • To prevent profile data from downloading to existing constituent records, select **Reject profile data for existing constituents**.

13. To process actions, click **Process**.

14. Click **Close**. You return to the NetCommunity page in The Raiser's Edge.

Advocacy Actions Field Mapping

Review the following table for information about advocacy data in The Raiser's Edge action records. This table applies to action records created after processing advocacy data from *Capwiz* and Blackbaud

NetCommunity to The Raiser's Edge.

Capwiz data	Action record field
Advocacy date	Action date
Advocacy time	Start time
Alert title	Alert title
Issue	Issue
Action type	Delivery method
Name	Recipient name
Message ID	Message ID
Message title	*Not stored in The Raiser's Edge*
Message	*Not stored in The Raiser's Edge*
Email ID	**NetCommunity Email Source ID** action attribute (if there is a source email)
Email subject	**NetCommunity Email Source action** attribute (if there is a source email and if the email has a subject)

Memberships

Before you process membership transactions, you should select options in NetCommunity Options in The Raiser's Edge on page 8. Specifically, you can apply Transaction Assignments on page 13 to membership transactions. Review that section before proceeding with this section.

If you include the Membership form on your website and allow members to join and renew their memberships online, you must process the online transactions on the NetCommunity page in The Raiser's Edge. When you process membership transactions, a gift batch is created in The Raiser's Edge, and a membership record is created or updated.

Warning: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), you cannot process a membership that contains recurring gift information if you use The Raiser's Edge 7.85 or earlier. To process recurring gift transactions, update The Raiser's Edge to version 7.86 or later.

You can manually override Raiser's Edge transactions and you must manually link any unresolved donors and gift of membership recipients to Raiser's Edge records. If a membership category is deleted before the batch is created, you can select a new category during the download/update database process.

Warning: Membership transactions require more interaction and thought than other transactions. You may need to think about certain transactions and manually make adjustments to the membership record during the download process, according to your organization's policies.

❯ Download memberships

When you use the single transaction process, you select each row individually to match the member with an existing Raiser's Edge record or add the member as a new record in the database.

1. From the NetCommunity page in The Raiser's Edge, click **Memberships**. The Memberships Transactions screen appears.

    Note: Membership transactions create a membership batch in The Raiser's Edge. From **Tools**, **Transaction Options**, you can select batch options before you process a membership. The batch screen does not appear until you process the membership. For more information, see Assign a batch for transactions on page 18.

2. On the Memberships Transactions tab, select the row to process by clicking in the **Donor Information** column. The **Constituent Linking** frame appears on the right and defaults to the Record Linking tab.

    Tip: This tab is called Assigned Memberships when transaction assignments are enabled. If transaction assignments do not apply to a transaction, an Unassigned tab may appear. Follow the same steps in this procedure to process transactions on these tabs. For information about transaction assignments, see Transaction Assignments on page 13.
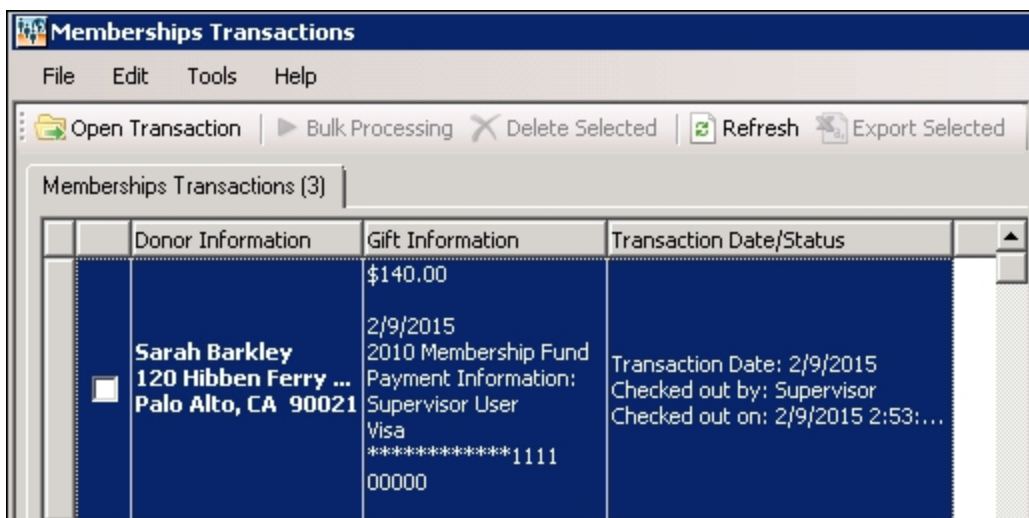
The **Gift Information** column displays the donation amount, the gift date, fund, source (or appeal), and payment details. If you support multiple currency types, review the following.

- If a gift amount has been converted to your local currency, the converted amount displays in "( )" in the **Gift Information** column.

- Exchange rates are established in Raiser's Edge Configuration. For more information, see The Raiser's Edge *Configuration & Security Guide*. To map currency types for Blackbaud NetCommunity, see the Blackbaud NetCommunity *Administration Guide*.

- In Blackbaud NetCommunity *Administration*, add an IATS merchant account for each currency type.

The **Transaction Date/Status** column on the Memberships Transactions tab defaults the date the user submitted the membership on your website. The checked out status also appears in the column. When a Raiser's Edge user is processing the transaction, **Checked out by** and **Checked out on** information displays. If a Raiser's Edge user is not processing the transaction, **Not Checked Out** displays.

3. In the **Constituent Linking** frame on the right, data from Blackbaud NetCommunity appears in the **Transaction Data** box. If your **Constituent Matching** options match a Raiser's Edge record, Raiser's Edge data appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the Raiser's Edge record for the user, click **Open Constituent**.

Tip: If duplicate records are found {Duplicates Found} appears in the **RE Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see Constituent Matching on page 13.

If you are sure the website user is the matched Raiser's Edge constituent and do not need to change the transaction, proceed to the **Transaction Constituent Code** step. If the records in the **Constituent Linking** frame match and you want to review or make changes to the transaction, click **Find Constituent** above the **Transaction Data** box. A screen appears to view additional data the user submitted on your site.

If the **Linked Constituent** box is blank, you must link the website user with an existing Raiser's Edge record or create a record for the user. For more information, see the next step.

4. To search for an existing Raiser's Edge constituent, click **Find Constituent**.

Tip: If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

A NetCommunity Transaction screen appears.

a. If the user entered information in the applicable section on the membership form, the Biographical, Preferred Address, and Primary Business tabs appear. On these tabs, select any fields in the **Search Field** column to use to process a Raiser's Edge search.

   The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

   > *Note:* We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria information may actually prevent you from locating a record. To clear all fields, click **Clear Search Criteria**.

b. To include inactive Raiser's Edge records in your search, select **Display inactive constituents**.

c. To include deceased Raiser's Edge records in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, if you select the checkbox to search for William Adamson's record and enter "Will Adamson," the program does not return his record because the search looks for an exact match for "William Adamson." If you clear the checkbox, the program initiates a "begins with" search that returns the record. We recommend you use this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

    Results in this grid cannot exceed 100 records. Records with **Has no valid address** selected in The Raiser's Edge are included in the search results.

f. If a record matches, select the row and click **Link Constituent**, **Choose Selected Constituent**.

> *Note:* If you edited the user's data in the **New Value** column, a message appears notifying you that the download transaction has changed. To add your changes to The Raiser's Edge, click **Yes**.

If an existing record does not match the donor, click **Link Constituent**, **Create New Constituent**. For information about creating new constituents, see the next step.

5. To create a record in The Raiser's Edge, click **Create New**, **Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box. A record has been created in The Raiser's Edge for the user.

a. To edit data the website user entered, click **Create New**, **Create New and Edit**. A screen appears to compare existing Raiser's Edge data with the donor information. If the user

entered information in the applicable section of the membership form, the Biographical, Preferred Address, and Primary Business tabs appear. You can process each tab individually or all at one time.

b. For each field to update on the Raiser's Edge record, select **Process**. If you clear **Process** for a field, the data does not download to The Raiser's Edge.

c. Information provided by the user during the membership appears in the **New Value** column. To edit data a user entered, make changes in the appropriate row in this column.

Tip: New table entries appear in bold. If you have appropriate rights, you can create a Raiser's Edge table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

d. Select the remaining applicable transaction options for the tab. After you are done, click **Save and Close**. The screen closes and you return to the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box.

6. In the **Transaction Constituent Code** frame, the constituent code selected on the part appears in the field. You can change or remove the constituent code in this field. This constituent code downloads to the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on the tab.

   If the constituent codes in the **Transaction Constituent Code** frame and the **New Constituents** option are the same, the constituent codes do not duplicate on the Bio 2 tab. If the constituent codes are different, both codes download to the constituent record. For more information about the option, see New Constituents on page 10.

7. In the **Membership Linking** frame, in the **Transaction Data** box, the membership transaction information appears.
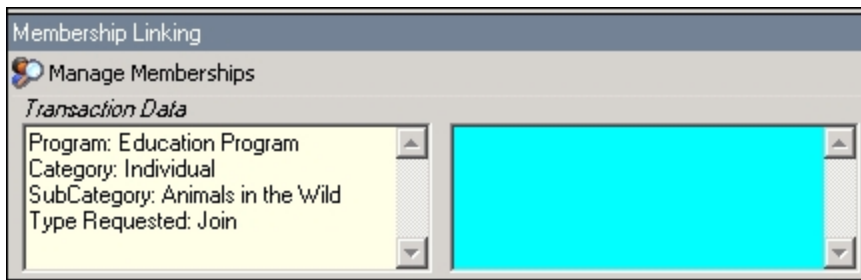
   a. If the box on the right is blank, you must manually link to information on the membership record. Even if information appears in the box, you may still need to manually adjust information on the membership record. For example, Blackbaud NetCommunity has no way of knowing that a switch from one category to another is an upgrade or downgrade. You must manually select the appropriate membership transaction type.

To do so, click **Manage Memberships**. The Link Membership Information screen appears.

b. Make any necessary changes to the membership, according to your organization's policies for membership transactions. For example, select to add the transaction as a new membership and click **Yes**.

Think about the information in the **Information entered by the Donor** box (on the Process Membership Transaction screen) and what it means to your organization. For example, a "join" request may actually be a renewal. Blackbaud NetCommunity does not know that a member who clicks **Join** on the website already has a record in your Raiser's Edge database and would actually be considered a "renewal" by your organization.

To view the membership record, click **View Membership**.

In the bottom frame, expiration or lifetime membership information defaults from The Raiser's Edge, based on the membership category and business rules.

c. Click **OK**. You return to the Membership Transactions screen.

8. In the **Recipient Linking** frame, the gift of membership information appears. You must manually link the individual in the **Transaction Data** box to a new or existing constituent record in The Raiser's Edge. To do so, follow the instructions from steps 4 or 5.

9. If the membership is a direct debit transaction, the **Bank Linking** frame appears. In the **Transaction Data** box, view the bank information for the membership.

If there is a match for the bank the donor entered, a link is established to the Raiser's Edge bank in the **Linked Bank** box and a **Linked** indicator appears above the box.

Tip: Bank information downloads to the Relationship tab on the constituent record.

   a. If the bank is not matched, click **Find Bank** to search for an existing Raiser's Edge bank. The search screen appears.

   b. Search for the bank to link to the direct debit. If the bank does not exist, click **Add New** to create a bank in The Raiser's Edge.

   c. To return to the **Bank Linking** frame, click **OK**. Bank data from The Raiser's Edge appears in

the **Linked Bank** box. **Linked** appears above the box.

10. In the **Matching Gift Linking** frame, in the **Transaction Data** box, view matching gift information for the membership.

The program attempts to link the matching gift company name with an existing Raiser's Edge organization record. Due to potential data entry inconsistencies, make sure the correct company is in the **Transaction Data** box.

a. Depending on how you add matching gifts to The Raiser's Edge, do one of the following to process the matching gift data from the website.

If the user did not enter a company, and if you are aware the user works for one, select a matching gift company. Click **Manage Matching Gifts**. On the Matching Gift Pledges screen, click **Add**.

If the company does not have an organization record in your Raiser's Edge database, create one.

If the donor entered a company name but you do not use MatchFinder Online, search to see if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears. To select a Matching Gift Company from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one.

Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, the **Add this company as an organization relationship for** checkbox enables. Select this to add the company as a relationship record for the member. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

If a member enters a company and you use MatchFinder Online, check if the company has a record in The Raiser's Edge. Click **Manage Matching Gifts**. The Matching Gift Pledges screen appears with additional features. To select the **Matching Gift Company** from your Raiser's Edge database, click the ellipsis. If the company does not have an organization record in your database, create one. To access MatchFinder Online and review the company's matching information, click **Lookup**. Enter the **Pledge amount**. After the organization is associated with a Raiser's Edge record, you can select to **Update this company with details from MatchFinder Online**. To add the company as a relationship record for the member in The Raiser's Edge, select **Add this company as an organization relationship for**. To view the company's matching details from MatchFinder Online, click **Details**. To include additional matching gifts, in the **Additional Matching Gift Pledges** frame, click **Add**.

b. To return to the **Matching Gift Linking** frame, click **OK**. **Linked** appears above the **Linked Matching Gifts** box. If you created a new record, an organization record has been created in The Raiser's Edge for the matching gift. For more information about matching gifts in The Raiser's Edge, see the The Raiser's Edge *Gift Records Guide*.

c. If the member did not enter a company in the **Matching Gifts** section on your membership page, the **Matching Gift Pledges** frame appears. You can select a matching gift company if you are aware the member works for one. To do this, click **Add**. If the company does not have an organization record in your Raiser's Edge database, you must create one.

11. To view origin information for the donation, select the Details tab. In the **NetCommunity Details** frame, information appears such as the **NetCommunity User** and the **NetCommunity Page** where the transaction occurred. In the **Transaction Details** frame, information appears such as The Raiser's Edge user that downloaded the transaction to the NetCommunity page and The Raiser's Edge user currently using the transaction.
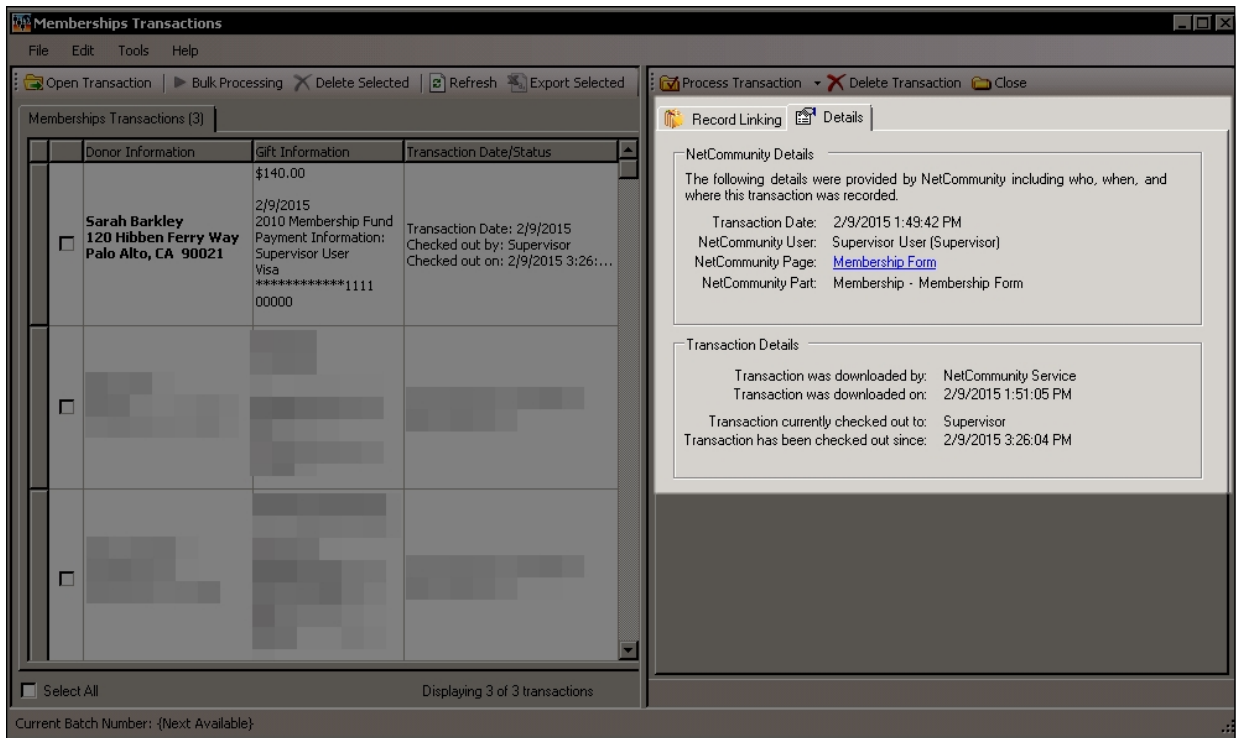
12. To download the donation, click **Process Transaction**.

    To save your information but not process the transaction, click **Process Transaction**, **Save Changes**. You can process the transaction at another time.
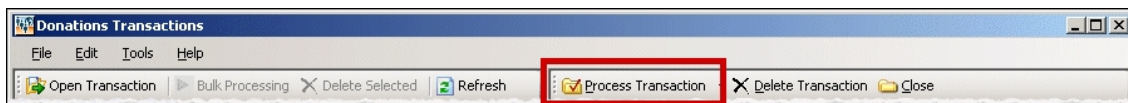
    The message "Batch # [ ] was created. Do you want to open the batch now?" appears.

    Note: The batch number is determined by the selection from the **Tools**, **Transaction Options** menu. In Transaction Options, you can create a batch or use an existing batch for donations. For more information, see Assign a batch for transactions on page 18.

13. To view the membership in batch, click **Yes**. The batch screen appears. After you view the membership, to close the batch, click **Close**.

    Note: You must commit a batch to process memberships to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

    If you do not want to view the membership in the batch, click **No**.

14. You return to the Memberships Transactions screen. To confirm the membership was included in the correct batch, view the **Current Batch Number** indicator in the lower left corner on the

Memberships Transactions screen.

15. Repeat this procedure to process other individual transactions on the Memberships Transactions screen.

   Tip: To make sure you have the latest information from the website, click **Refresh**.

16. To delete a membership you do not want to process, select the row and click **Delete Transaction**.

   A confirmation message appears. Click **Yes**.

> Download memberships - bulk process

When you use bulk process, you select to download all members as new records in The Raiser's Edge and process every membership simultaneously. If you process everything, you may need to clean up data in The Raiser's Edge after processing completes.

1. From the NetCommunity page in The Raiser's Edge, click **Memberships**. The Memberships Transactions screen appears.

Tip: To make sure you have the latest information from the website, click **Refresh**.

2. To process every transaction on the screen, select **Select All**. When you select this, a checkbox appears for every row. Clear the checkbox next to any names you do not want to process to The Raiser's Edge.

   To delete memberships that you do not want to process, select the boxes beside the rows and click **Delete Selected**. A confirmation message appears. Click **Yes**.

3. Click **Bulk Processing**. The Process Online Memberships screen appears.

4. On the Processing tab, review bulk properties such as **Transactions Selected** and **Successfully Checked Out**.

5. On the Options tab, select options for **Batch Number**, **Unlinked Records**, and **Transaction Profile Data** in the bulk process.
   a. In the **Batch Number** frame, select how to process the bulk memberships to Raiser's Edge *Batch*.

      - To create a batch that uses the next available batch number in The Raiser's Edge, select **Use the next available batch number**.

      - To download the gifts to an existing batch in The Raiser's Edge, select **Add records to an existing batch**. Click the binoculars to select the existing batch. If the batch includes a default set, the values apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.

      - To load a default set of values from an existing batch for a new batch, select **Load fields and default values from an existing batch**. In the field below, click the binoculars to select the batch to load the default set from. Because you are selecting a default set for a new batch, you can select from a previously committed batch.

> *Note:* These batch options also appear from the **Tools**, **Transaction Options** menu. For more information, see Assign a batch for transactions on page 18.

b. In the **Unlinked Records** frame, to attempt constituent matching based on the options in **Constituent Matching**, select **Attempt auto-match to an existing record**. For more information, see Constituent Matching on page 13.

c. To create a Raiser's Edge record for the member, select **Create new Raiser's Edge record automatically**.

d. To ignore Raiser's Edge required fields, select **Bypass required fields**. For more information, see Required Fields in The Raiser's Edge on page 16.

e. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the member. If you accept profile information, the data defaults to the constituent record in The Raiser's Edge.

- **Accept Profile Information** is selected by default for each bulk process. To reject information, you must select **Reject Profile Information** for each bulk process.

> *Warning:* Be aware if you reject data on the Memberships Transactions screen and select **Accept Profile Information**, *all* data downloads to The Raiser's Edge. This includes partial data from a transaction (for example, an incorrect street address) and rejected transactions. If you reject data on the Memberships Transactions screen, select **Reject Profile Information** to reject that data and download the remaining data to The Raiser's Edge.

6. When you finish, on the Process tab, click **Process Now**. Bulk processing begins.

7. When the process completes, the message "Batch # [ ] was created. Do you want to open the batch now?" appears.

8. Click **Yes**. The batch screen appears.

9. On the toolbar, click **Commit**. The Commit Gift Batch screen appears.

10. Click **Commit Now**. A summary screen appears.

> *Note:* You must commit a batch to process memberships to The Raiser's Edge records. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to the database. For more information, see The Raiser's Edge *Batch Guide*.

11. To close the batch, click **Close**. You return to the NetCommunity page in The Raiser's Edge, and membership information is updated in The Raiser's Edge.

Automatically Renew Membership Details

When a member selects the **Automatically renew this membership** checkbox, a recurring gift downloads to The Raiser's Edge. The member must pay for the renewal by using a direct debit or credit card. If the member uses a direct debit, the recurring gift downloads to The Raiser's Edge batch and the recurring gift payment processes the day the member enters in the **Starting on** field. If the member uses a credit card, a recurring gift downloads with the first recurring gift payment in the same

Raiser's Edge batch. For information about processing recurring gifts and recurring gift payments in batch, see The Raiser's Edge *Batch Guide*.

Not all membership categories are available for automatic renewal. The renewal schedule for a membership category must match a recurring gift schedule. For example, a membership category renewal schedule that is once per year matches a recurring gift payment schedule that is once per year. Memberships on a weekly or daily renew schedule are not supported for automatic renewal. Lifetime memberships are also not supported.

Note: When you process a membership that has been renewed automatically, you can select a membership category for the transaction that does not allow for automatic renewals. If you do this, a notification for the membership category change is *not* sent to the member. If you change the membership expiration date, the default recurring gift schedule remains the same.

The Raiser's Edge Details

When you process automatic renewal memberships from Blackbaud NetCommunity in The Raiser's Edge, it is important to remember the following.

- On the Commit Gift Batch screen, select **Apply the payment to the same membership**. When you select this checkbox, the recurring gift payment in the batch is applied to the recurring gift and the membership.

- If a user automatically renews a gift of membership and you soft credit gift of membership recipients, you must manually add the soft credit in The Raiser's Edge. You cannot add the soft credit in *Batch*.

For information about committing a batch, see The Raiser's Edge *Batch Guide*. For information about manually adding soft credits, see The Raiser's Edge *Gift Records Guide*.

Surveys

You can download survey responses from Blackbaud NetCommunity to The Raiser's Edge. Only responses from Raiser's Edge constituents who logged into the website download. For more information about creating surveys, see the *Parts Guide*.

The **Surveys** link appears on the NetCommunity page in The Raiser's Edge only if you have survey transactions ready to download. You can create constituent queries in The Raiser's Edge to view or report on survey responses.

> **Download survey responses**

1. From the NetCommunity page in The Raiser's Edge, click **Surveys**. A message screen appears displaying the number of survey responses that downloaded.

   If you clicked **Clear Responses** on a Survey part, an additional transaction appears in the responses count on the NetCommunity page and is included in the total download count after you process the transactions. Survey responses do not clear until you process this transaction. For more information about clearing responses, see the *Parts Guide*.

2. Click **OK**. You return to the NetCommunity page in The Raiser's Edge.

View Survey Responses in Query

You can create queries in The Raiser's Edge to view or report on survey responses. You can also use queries to respond to the survey results. For example, if you survey constituents about the environmental issue that is most important to them, you can create targeted content directed to constituents based on queries of their responses.

If you have NetCommunity installed on your workstation, the **Surveys** node appears in the **Available fields** box when you create a constituent query. Under **Surveys**, you find query output fields including: Answer, Answer Column, Name [of survey], Question, Response, and Response Date.

The Raiser's Edge Field Mapping

You can review the following data map tables for information about field mapping between Blackbaud NetCommunity and The Raiser's Edge. For example, after your organization receives donations on your Blackbaud NetCommunity website through a Donation Form part, you can process the data to The Raiser's Edge, where it appears on constituent and gift records. For data map tables that describe where this data from Blackbaud NetCommunity appears in The Raiser's Edge, see .

Alumni Class Notes

This table shows the default field mappings for the Alumni Class Notes part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Class Note	Constituent Notepad	**Note**
Create/Edit Class Note	Constituent Notepad	New or updated **Notepad**
		Author = Constituent
		Description = "Blackbaud NetCommunity class note"
		Type = Set in Blackbaud NetCommunity plug-in Options
		Date = Date note submitted
		Title = "[class year] class notes"

Attributes

Blackbaud NetCommunity uses five attribute types from The Raiser's Edge.

Raiser's Edge Attribute	Notes
Constituent	If you know an attribute exists in The Raiser's Edge but do not see it online, check the Settings tab in *Sites & settings* to make sure the attribute is available in Blackbaud NetCommunity.
Education	If you know an attribute exists in The Raiser's Edge but do not see it online, check the Settings tab in *Sites & settings* to make sure the attribute is available in Blackbaud NetCommunity.
Gift	n/a
Job (view only)	n/a
Participant	n/a

Blackbaud NetCommunity uses six attribute data types.

Raiser's Edge Attribute Data Type	Notes
Currency	A text box exists for currency attributes. You can edit non-numeric characters in *Batch*.
Date	A calendar icon exists to enter a date. Users can also manually enter a date.
Number	You must remove special characters before processing the number to The Raiser's Edge.
Table	When **Allow Only 1 per Record** is selected in The Raiser's Edge, the user selects the entry from a drop down.
Text	**Text attributes are limited to 255 characters.**
Yes/No	Includes a Yes/No drop down.

Blackbaud NetCommunity two attribute fields in The Raiser's Edge.

Raiser's Edge Attribute Field	Notes
Category	Users cannot edit attribute categories. You can enter an alternate caption on all applicable parts except the User Login part.
Description	Users can have the option to edit attribute descriptions.

Blackbaud NetAdvocacy

With *Blackbaud NetAdvocacy*, you can download advocacy action data to The Raiser's Edge. *Blackbaud NetAdvocacy* is used with the *Capwiz* subscription service to include pages on your site where users can email influential individuals to encourage their influence on particular causes.

This table shows the default field mappings for *Blackbaud NetAdvocacy.*

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Take Action	Advocacy Action	New constituent action. One action created for each recipient.
Advocacy Date	Action	**Action date** (General tab)
Advocacy Time	Action	**Start time** (General tab)
Alert Title	Action	**Alert Title**
Issue	Action	**Issue**
Action Type	Action	**Delivery Method**
Name	Action	**Recipient Name**
Message ID	Action	**Message ID**
Message Title	None	Does not map to The Raiser's Edge
Message	None	Does not map to The Raiser's Edge
Email ID	Action Attribute	NetCommunity Email Source ID (if applicable)
Email Subject	Action Attribute	NetCommunity Email Source (if applicable)

Directory

These sections show the default field mappings for the fields on the Directory part. This section only pulls information from The Raiser's Edge.

Note: The system administrator selects the attributes available under **Constituent Attributes**, **Primary Education Attributes**, and **Education History Attributes** in *Sites & settings* in Blackbaud NetCommunity.

Bio

This table shows the default field mappings for the **Bio** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Name	Individual Constituent	**Name** (Bio 1)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title 1	Individual Constituent	**Titles** (Bio 1)
Title 2	Individual Constituent	**Titles** (Bio 1)
First Name	Individual Constituent	**First Name** (Bio 1)
Middle Name	Individual Constituent	**Middle Name** (Bio 1)
Last name	Individual Constituent	**Last name** (Bio 1)
Suffix 1	Individual Constituent	**Suffixes** (Bio 1)
Suffix 2	Individual Constituent	**Suffixes** (Bio 1)
Nickname	Individual Constituent	**Nickname** (Bio 1)
Maiden name	Individual Constituent	**Maiden name** (Bio 1)
Gender	Individual Constituent	**Gender** (Bio 1)
Birth date	Individual Constituent	**Birth date** (Bio 1)
Marital status	Individual Constituent	**Marital status** (Bio 1)
Requests no email	Individual Constituent	**Requests no email** (Bio 1)

Organization

This table shows the default field mappings for the **Organization** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Org Name	Organization Constituent	**Org Name** (Bio 1)
Target	Organization Constituent	**Target** (Bio 2)
Income	Organization Constituent	**Income** (Bio 2)
Industry	Organization Constituent	**Industry** (Bio 2)
No. employees	Organization Constituent	**No. employees** (Bio 2)
No. subsidiaries	Organization Constituent	**No. subsidiaries** (Bio 2)

Preferred Address

This table shows the default field mappings for the **Preferred Address** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Country	Individual Constituent	**Country** (Addresses tab — Preferred Address)
Address Line 1	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 2	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 3	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 4	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 5	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
City	Individual Constituent	**City** (Addresses tab — Preferred Address)
NZ Suburb	Individual Constituent	For the New Zealand version: **SuburbCity (Addresses tab — Preferred Address)** For the Australia version: **Suburb/State**
NZ City	Individual Constituent	For the New Zealand version: **SuburbCity** (Addresses tab — Preferred Address) For the Australia version: **Suburb/State**
County	Individual Constituent	**County** (Addresses tab — Preferred Address)
State	Individual Constituent	**State** (Addresses tab — Preferred Address)
Zip code	Individual Constituent	**Zip code** (Addresses tab — Preferred Address)

Phones and Email

This table shows the default field mappings for the **Phone and Email** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Home Phone	Individual Constituent	"Home" phone type (Addresses tab — Preferred Address)
Business Phone	Organization Relationship	"Business" phone type (Relationships tab — Preferred Business)
Preferred Email	Individual Constituent	"Email" phone type (Addresses tab — Preferred Address)
Website/URL	Individual Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity (Addresses tab — Preferred Address)
Additional Phone 1	Individual Constituent	Phone type set in *System Options*, in **Blackbaud NetCommunity** (Addresses tab — Preferred Address)
Additional Phone 2	Individual Constituent	Phone type set in *System Options*, in **Blackbaud NetCommunity** (Addresses tab — Preferred Address)
Additional Phone 3	Individual Constituent	Phone type set in *System Options*, in **Blackbaud NetCommunity** (Addresses tab — Preferred Address)
Additional Phone 4	Individual Constituent	Phone typeset in *System Options*, in **Blackbaud NetCommunity** (Addresses tab — Preferred Address)
Additional Phone 5	Individual Constituent	Phone type set in *System Options*, in **Blackbaud NetCommunity** (Addresses tab — Preferred Address)

Record

This table shows the default field mappings for the **Record** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Home Phone	Individual Constituent	**"Home" phone type** Addresses tab — Preferred Address)
Business Phone	Organization Relationship	"Business" phone type (Relationships tab — primary business)
Preferred Email	Individual Constituent	**"Email" phone type** (Addresses tab — Preferred Address)

Spouse

This table shows the default field mappings for the **Spouse** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title 1	Spouse Relationship	**Title 1** (General 1 tab for spouse)
Title 2	Spouse Relationship	**Title 2** (General 1 tab for spouse)
First Name	Spouse Relationship	**First name** (General 1 tab for spouse)
Middle Name	Spouse Relationship	**Middle name** (General 1 tab for spouse)
Last name	Spouse Relationship	**Last name** (General 1 tab for spouse)
Suffix 1	Spouse Relationship	**Suffixes** (General 1 tab for spouse)
Suffix 2	Spouse Relationship	**Suffixes** (General 1 tab for spouse)
Maiden Name	Spouse Relationship	**Maiden name** (General 1 tab for spouse)

Business

This table shows the default field mappings for the **Business** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Organization Name	Organization Relationship	**Org name** (General tab — Primary Business)
Position	Organization Relationship	Position (General tab — Primary Business)
Profession	Organization Relationship	**Profession** (General tab — Primary Business)
Country	Organization Relationship	Country (General tab — Primary Business)
Address Line 1	Organization Relationship	**Address Lines** (General tab — Primary Business)
Address Line 2	Organization Relationship	**Address Lines** (General tab — Primary Business)
Address Line 3	Organization Relationship	Address Lines (General tab — Primary Business)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Address Line 4	Organization Relationship	**Address Lines** (General tab — Primary Business)
Address Line 5	Organization Relationship	Address Lines (General tab — Primary Business)
City	Organization Relationship	**City** (General tab — Primary Business)
NZ Suburb	Organization Relationship	For the New Zealand version: **SuburbCity** (General tab — Primary Business) For the Australia version: **Suburb/State**
NZ City	Organization Relationship	For the New Zealand version: **SuburbCity** (General tab — Primary Business) For the Australia version: **Suburb/State**
County	Organization Relationship	**County** (General tab — Primary Business)
State	Organization Relationship	**State** (General tab — Primary Business)
Zip code	Organization Relationship	**Zip code** (General tab — Primary Business)
Industry	Organization Relationship	**Industry** (General tab — Primary Business)

Primary Alumni

This table shows the default field mappings for the **Primary Alumni** part.

Note: The **Primary Alumni** fields only appear if you use *Alumni Tracking* in The Raiser's Edge.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Class of	Education/School Relationship	**Class of** (School tab — Primary alumni information)
School name	Education/School Relationship	**School name** (School tab — Primary alumni information)
Campus	Education/School Relationship	**Campus** (School tab — Primary alumni information)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
School type	Education/School Relationship	**School type** (School tab — Primary alumni information)
Known name	Education/School Relationship	**Known name** (School tab — Primary alumni information)
Frat/Sorority	Education/School Relationship	Frat/Sorority (School tab — Primary alumni information)
Degree	Education/School Relationship	Degree (School tab — Primary alumni information)
GPA	Education/School Relationship	**GPA** (School tab — Primary alumni information)
Date entered	Education/School Relationship	**Date entered** (School tab — Primary alumni information)
Date graduated	Education/School Relationship	**Date graduated** (School tab — Primary alumni information)
Date left	Education/School Relationship	Date left (School tab — Primary alumni information)
Major	Education/School Relationship	**Major** (School tab — Primary alumni information)
Minor	Education/School Relationship	**Minor** (School tab — Primary alumni information)
Status	Education/School Relationship	**Status** (School tab — Primary alumni information)

Education History

The table shows the default field mappings for the **Education History** fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
School name	Education/School Relationship	**School name** (School tab — Primary alumni information)
School type	Education/School Relationship	**School type** (School tab — Primary alumni information)
Primary Alumni	Education/School Relationship	**Primary alumni information** (School tab — Primary alumni information

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Campus	Education/School Relationship	**Campus** (School tab — Primary alumni information)
School type	Education/School Relationship	**School type** (School tab — Primary alumni information)
Known name	Education/School Relationship	**Known name** (School tab — Primary alumni information)
Frat/Sorority	Education/School Relationship	Frat/Sorority (School tab — Primary alumni information)
Degree	Education/School Relationship	Degree (School tab — Primary alumni information)
GPA	Education/School Relationship	**GPA** (School tab — Primary alumni information)
Class of	Education/School Relationship	**Class of** (School tab — Primary alumni information)
Date entered	Education/School Relationship	**Date entered** (School tab — Primary alumni information)
Date left	Education/School Relationship	Date left (School tab — Primary alumni information)
Date graduated	Education/School Relationship	**Date graduated** (School tab — Primary alumni information)
Major	Education/School Relationship	**Major** (School tab — Primary alumni information)
Minor	Education/School Relationship	**Minor** (School tab — Primary alumni information)
Status	Education/School Relationship	**Status** (School tab — Primary alumni information)

Donation Form

These sections show the default field mappings for the fields on the Donation Form part.

Individual Gift

This table shows the default field mappings for an individual gift on the Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Make individual gift	(1) Individual Constituent (2) Gift	(1) **New Constituent** or link to existing (2) **New Gift**
Giving level designation	Gift	Gift value maps to **Amount** Gift Description does not map to The Raiser's Edge.
Amount	Gift	**Amount (Gift tab)**
Designation	Gift	**Fund (Gift tab)**
"Other" designation	Gift	Does not map to specific field. It must be linked to a Fund in the Blackbaud NetCommunity plug-in before you can create the batch can be created.
Frequency	None	Updates the donation form to include recurring gift schedule fields
Corporate	None	Inserts the **Company** field into the Billing Information section of the donation form
Anonymous	Gift	**This gift is anonymous** (Miscellaneous tab)
Comments	Gift Attribute	**Category** = "NetCommunity Comments" **Description** = Comment
Gift Attributes	Gift Attribute	**Category** = User defined **Description** = Donor selection
How did you hear about our site (**Source** field)	Gift	**Appeal** (Gift tab)
Bill name fields	Individual Constituent	Name fields (Bio 1 tab)
Billing address block	Individual Constituent	Address fields (Addresses tab — Preferred Address)
Billing phone	Individual Constituent	"Home" phone type (Addresses tab — preferred address)
Billing email	Individual Constituent	"Email" phone type (Addresses tab — preferred address)
Payment Method	Gift	**Pay method** (Gift tab)

Credit Card Gift

This table shows the default field mappings for credit cards on the Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Cardholder's Name	Gift	**Cardholder** (Gift tab)
Credit Card Number	(1) None (2) Gift	Last four digits of the credit card number appear
Card Type	Gift	**Card type** (Gift tab)
Card Expiration	(1) None (2) Gift	(1) Only used to process the transaction if an outright gift (2) **Card exp**. if transaction is a recurring gift
Card Security Code	None	Only used to process the transaction

Direct Debit Gift

This table shows the default field mappings for direct debits.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Financial Institution	(1) Bank/Financial Institutions Relationship (2) Financial Institutions in Configuration (3) Gift	(1) New relationship record or link to existing Bank/Financial Institution relationship (2) **New financial institution** or link to existing (3) **Bank** (Gift tab)
Branch Name	Bank/Financial Institutions Relationship	**Branch name (General tab)**
Routing Number	Bank/Financial Institutions Relationship	**Transit/Routing no.** (General tab)
Account Number	Bank/Financial Institutions Relationship	**Account number** (General tab)
Account Type	Bank/Financial Institutions Relationship	**Account type (General tab)**
Account Holder's Name	None	Only used to process the transaction

Bill Me Later

This table shows the default field mappings for a pledge on the Donation Form when a user selects **Bill Me Later**.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Bill me later	Revenue	New pledge gift

Recurring Gift

This table shows the default field mappings for a recurring gift on a Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Frequency	Gift	**Gift Type** = "Recurring Gift" (Gift tab)
On	Gift Transaction Schedule	**Day of week**
Starting	Gift Transaction Schedule	**Starting on**
Ending	Gift Transaction Schedule	**Ending on**

Matching Gift

This table shows the default field mappings for a matching gift on the Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Make matching gift	(1) Individual Constituent (2) Organization Constituent (3) Organization Relationship (4) Gift	(1) New individual record or link to existing record (2) New organization record or link to existing record (3) New relationship record (4) New gift record
My company will match my gift	Gift	Creates Matching Gift Pledge
Company	Organization Constituent	New organization record or link to existing record

Corporate Gift

This table shows the default field mappings for a corporate gift on the Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Make Corporate Gift	(1) Individual Constituent (2) Organization Constituent (3) Organization Relationship (4) Individual Relationship (5) Gift	(1) New individual record or link to existing record (2) New organization record or link to existing record (3) New primary business relationship on individual record or link to existing record (4) New employee individual relationship record on Organization record or link to existing record (5) New gift on Organization record
Donor Name	Gift Attribute	**Category** = "NetCommunity Corporate Donation Contact" **Description** = Donor Name
Company	Organization Constituent	**Org Name** (Org tab)

Tribute Gift

This table shows the default field mappings for a tribute gift on the Donation Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Make tribute gift	Gift	New tribute (Tribute tab)
Tribute is made by	(1) Individual Constituent (2) Gift Tribute	(1) New honor/memorial individual or link to existing honor/memorial individual (2) **Honor/Memorial Name** (Tribute tab)
Tribute Type	Gift Tribute	**Tribute Type** (Tribute tab)
Description	Gift Tribute	**Description** (Tribute tab)
Mail a letter on my behalf	None	Updates donation form to include acknowledgee fields

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Full Name	(1) Gift Tribute	(1) **Acknowledgee**
	(2) Individual Relationship of the tribute recipient	(2) Name fields (General tab)
Acknowledgee Name	Gift Tribute	**Name**
Address block	Individual Relationship	Address fields (Addresses tab)
Phone	Individual Relationship	Home phone type (Addresses tab)
Email	Individual Relationship	Email phone type (Addresses tab)

eCards

This table shows the default field mappings for the eCards part. This data only posts to The Raiser's Edge if a donation is associated with the eCard.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Recipient First Name	Gift	**Recipient First name**
Recipient Last name	Gift	Recipient Last name
Send date	Gift	**Send date**

If the eCard has multiple recipients, only the first recipient name information in the recipient list downloads to The Raiser's Edge.

Event Registration Form

This table shows the individual record default field mappings for the Event Registration Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Register for event	(1) Individual Constituent (2) Event Participant (3) Gift	(1) New Individual or link to existing (2) New Registrant (3) New Gift
Registrant name fields	(1) Individual Constituent (2) Event Participant	(1) **Name** fields for new individual or can update name fields for existing constituent (2) **Registrant Name** field
Registrant address block	Individual Constituent	**Preferred Address** for new individual or update existing address for existing constituent
Participant Attribute(s)	Event participant	**Registrant or Guest Participant Attribute(s)**
Registrant phone	Individual Constituent	**Phones/Email/Links** grid, "Phone" type on new individual or update phone for existing constituent
Registrant email	Individual Constituent	**Phones/Email/Links** grid, "Email" type on new individual or update email for existing constituent
Additional registrants	Event Participant	New Guest. **Registrant** field defaults to "Registered" (General tab) *Note*: When the person who pays selects **Register later** for an additional registrant, "Guest of [Last name]" appears for the registrant name. The last name is the same as the cardholder's.
Additional registrant address block	Event Participant	**Preferred Address** (Participant Biograhical Information screen)
Additional registrant phone	Event Participant	**Phones/Email/Links** grid, "Phone" type (Participant Biographical Information screen)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Additional registrant email	Event Participant	**Phones/Email/Links** grid, "Email" type (Participant Biographical Information screen)
Registration fee	(1) Gift (2) Event Participant	Fees only credit to the person who pays; additional registrants do not receive credit. (1) Gifts tab, **Amount** field (2) Registration Fees tab, **Amount paid** field *Note:* Free events do not download data to the gift or event participant records.
Receipt amount *Note:* Appears in the merge field list for the part's acknowledgement email.	Gift	**Receipt amt** *Note*: This field includes the registration fee plus the additional donation, if applicable
Event name	Event	**Name**
Description	Event	**Description**
Number of registrants	Event	**No. Participants**

This table shows the organization record default field mappings for the Event Registration Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Register for event	(1) Organization Constituent (2) Event Participant (3) Gift	(1) New Organization or link to existing (2) New Registrant. **Registrant** field defaults to "Do not register" (General tab) (3) New Gift

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Registrant who pays	(1) Individual Constituent (2) Event Participant (3) Relationship	(1) New Individual or link to existing (2) New Guest. If attending, **Registrant** field defaults to "Registered." If not attending, **Registrant** field defaults to "Do not register" (General tab). The registrant name appears as "Cardholder last name". (3) Individual links to organization and the **Contact** checkbox selects (General 1 tab)
Additional registrants	Event Participant	(1) New Guest. **Registrant** field defaults to "Registered" (General tab) *Note*: When the person who pays selects **Register later** for an additional registrant, "Guest of [Last name]" appears for the registrant name. The last name is the same as the cardholder's.
Registrant address block	(1) Organization Constituent (2) Individual Constituent	(1) **Preferred Address** on new organization or can update address for existing constituent (2) **Preferred Address** on new individual or can update address for existing constituent for the registrant who pays. No updates for additional registrants
Participant Attribute(s)	Event participant	**Registrant or Guest Participant Attribute(s)**
Registrant phone	(1) Organization Constituent (2) Individual Constituent	(1) **Phones/Email/Links** grid, "Home" type on new organization or can update address for existing constituent (2) **Phones/Email/Links** grid, "Home" type on new individual or can update address for existing constituent for the registrant who pays. No updates for additional registrants
Registrant email	(1) Organization Constituent (2) Individual Constituent	(1) **Phones/Email/Links** grid, "Email" type on new organization or can update address for existing constituent (2) **Phones/Email/Links** grid, "Email" type on new individual or can update address for existing constituent for the registrant who pays. No updates for additional registrants
Additional registrant name	Event Participant	**First name and Last name** fields (Participant Biograhical Information screen)
Additional registrant email	Event Participant	**Phones/Emails/Links** grid, "Email" type (Participant Biograhical Information screen)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Additional registrant phone	Event Participant	**Phones/Email/Links** grid, "Phone" type (Participant Biograhical Information screen)
Additional registrant address block	Event Participant	**Preferred Address** (Participant Biograhical Information screen)
Registration fee	(1) Gift (2) Event Participant	Fees credit to the orgization; the person who pays and additional registrants do not receive credit. (1) Gifts tab, **Amount** field (2) Registration Fees tab, **Amount paid** field *Note:* Free events do not download data to the gift or event participant records.
Receipt amount *Note:* Appears in the merge field list for the part's acknowledgement email.	Gift	**Receipt amt** *Note*: This field includes the registration fee + the additional donation, if applicable.
Event name	Event	**Name**
Description	Event	**Description**
Number of registrants	Event	**No. Participants**

Event Registration Form (Classic)

This table shows the default field mappings for the Event Registration Form (Classic) part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Register for event	(1) Individual Constituent (2) Organization Constituent* (3) Event Participant (4) Gift	(1) New Individual or link to existing (2) New Organization or link to existing (3) New Registrant & New Guest(s) (4) New Gift
Registrant name fields	(1) Individual Constituent (2) Event Participant	(1) **New Individual Name Fields** or can update existing name if registrant not logged-in at time of registration (2) **Registrant Name Fields** unless registrant is logged-in to site. Then nothing happens to this data and the registrant name is taken from the constituent record
Registrant address block	(1) Individual Constituent (2) Event Participant	(1) **Preferred Address** on new individual or can update existing address if registrant is not logged-in at time of registration (2) **Registrant Address Block** unless registrant is logged-in to site. Then nothing happens to this data and the registrant address is taken from the constituent record
Registrant phone	(1) Individual Constituent (2) Event Participant	(1) **"Home" Phone Type** on new preferred address or can update existing. "Home" phone if registrant is not logged in at time of registration (2) **Registrant Phone Number** unless registrant is logged-in to site. Then nothing happens to this data and the registrant "Home" phone is taken from the constituent record
Registrant email	(1) Individual Constituent (2) Event Participant	(1) **"Email" Phone Type** on new preferred address or can update existing "Email" phone if registrant is not logged in at time of registration (2) **Registrant Email Address** unless registrant is logged-in to site. Then nothing happens to this data and the registrant "Email" phone is taken from constituent record
Additional Registrant Name	Event Participant	**Guest First and Last name**
Additional Registrant Email	Event Participant	**Guest Email Address**

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Additional Registrant Address Block	Event Participant	**Guest Address Block**
Participant Attribute(s)	Event participant	**Registrant or Guest Participant Attribute(s)**
Matching Gift Company Name*	Constituent	**Organization Constituent Name**
Registration Fee	Gift	**(1) Gift Amount**
		(2) **Matching Gift Pledge Amount** on the individual and the organization constituent
Event Item Name	Event	**Name**
Pricing Description	Event	**Comments**
Pricing Number of Participants	Event	**No. Participants**
Attendee Name	Event Participant	**Last name**
		First name
Attendee Email	Event Participant	**"Email" Phone Type**
Receipt Amount *Note:* Appears in the merge field list for the part's acknowledgement email.	Gift	**Receipt amt**

* If registrant indicates that company will match event registration fee.

Fundraiser

This table shows the default field mappings for the Fundraiser part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Join Fundraiser	(1) Individual Constituent (2) Fund	(1) **New Individual** or link to existing (2) **New Solicitor Team**, **Individual Solicitor**, or **Solicitor Team Member**

My Home

This table shows the default field mappings for the My Home page.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Update Goal	(1)Fund	(1) Update **Solicitor Goal**
	(2) Individual Constituent	(2) Update **Solicitor Information Goal**

Offline Donations

This table shows the default field mappings for the Offline Donations page.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Enter New Donation	(1) Constituent	(1) **New Individual** or link to existing
	(2) Gift	(2) New Pledge, with the fundraiser as solicitor
Amount	Gift	**Pledge Amount**
This donation is on behalf of a company	Gift	Updates the form fields to include Company. See Donation form.
The donor would prefer to make this gift anonymous	Gift	**Gift is anonymous** (Miscellaneous Tab)
Donor Name Fields	Individual Constituent	**Name Fields** (Bio 1)
Donor Address Block	Individual Constituent	**Address Block** (Preferred Address)
Donor Phone	Individual Constituent	"Home" Phone Type in Blackbaud NetCommunity *System Options* (Preferred Address)
Donor Email	Individual Constituent	"Email" Phone Type in Blackbaud NetCommunity *System Options* (Preferred Address)
Payment Option	Gift	**Pay Method**
Check Number*	Gift	**Gift number**
Check Date*	Gift	**Check date**

* If Payment Option is set to Check.

Fundraiser Report

This table shows the default field mappings for the Fundraiser Report part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Fund Goal Amount	Fund	Overall Goal

Fundraiser Welcome Email

These sections show the default field mappings for the merge fields in the Fundraiser part's welcome email.

Fundraiser

This table shows the default field mappings for the fundraiser merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Name	Fund	Fund ID
Description	Fund	Description
Overall Goal	Fund	Overall goal
Start Date	Fund	Start date
End Date	Fund	End date

Solicitor

This table shows the default field mappings for the solicitor.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Goal	Fund	Solicitor goal
Reports To	Fund	Assigned Solicitors for this Fund

Profile Fields

The default field mappings for merge fields under **Profile Fields** on the Fundraiser part's welcome email are the same the fields in the Directory part. For more information, see .

User Fields

This table shows the default field mappings for Fundraiser on the Fundraiser Welcome Email part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
First Name	Individual Constituent	First name
Last name	Individual Constituent	Last name
User Name	User Information	Username

Giving Search

This table shows the default field mappings for the Giving Search part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Fund ID	Fund	Fund ID
Description	Fund	Description
Category	Fund	Fund category
Type	Fund	Type
Start Date	Fund	Start date
End Date	Fund	End date

Membership Form

These sections show the default field mappings for the Membership Form part.

Registration

This table describes the default field mapping for a registration on the Membership Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Program	Membership	**Program**
Category	Membership	**Category**
Subcategory	Membership	**Subcategory**
Dues	(1) Gift (2) Membership	(1)**Amount** (2) **Dues**
I wish to waive all benefits	Membership	**Benefits Waived**
Reason for joining	Membership	**Reason for Join**
Reason for renewing	Membership	**Reason for Renew**
I wish to give a gift of membership	Membership	The checkbox updates the form to capture gift recipient information and places the membership record on the recipient's constituent record. It also populates the field "**Membership gift from**" (Gift of Membership)
I wish to give an additional contribution	Gift	Increases **Gift Amount** by value of additional contribution
Name on card	Membership	**Name on card** (Primary Member's Card Information)
Number of cards requested	Membership	**Number to print** (Primary Member's Card Information)
Additional Member Name	Membership	**Name on card** (Card/Guest pass Recipient)
Additional Member drop-down field	Membership	**Relationship** (Card/Guest Pass Recipient)
Is child	Membership	**Number of children on this membership** (Other Members and Card Information)
Requests card	Membership	**Number to print (Card/Guest pass Recipient)**

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Billing Name Fields	(1) Individual Constituent OR (2) None	**(1) New Individual's Name** or link to existing individual's name Only used to process the transaction if logged-in site member renews/joins
Billing Address Block	(1) Individual Constituent OR (2) None	(1) **Preferred Address** on new individual or can be used to update existing preferred address if not logged-in at time of transaction (2) Only used to process the transaction if logged-in site member renews/joins
Billing Phone	(1) Individual Constituent OR (2) None	(1) **New "Home" Phone Type on Preferred Address, or can be used to update preferred address if not logged-in at time of transaction** (2) Only used to process the transaction if logged-in site member renews/joins
Billing Email	(1) Individual Constituent OR (2) None	(1) **New "Email" Phone Type on Preferred Address, or can be used to update preferred address if not logged-in at time of transaction** (2) Only used to process the transaction if logged-in site member renews/joins
Payment Option	Gift	Pay method

Credit Card Gift

This table shows the default field mappings when a membership is paid for with a credit card.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Cardholder's Name	Gift	**Cardholder**
Credit Card Number	None	Only used to process the transaction
Card Type	Gift	**Card Type**

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Card Expiration	None	Only used to process the transaction
Card Security Code	None	Only used to process the transaction

Bill Me Later

This table shows the default field mappings when a user selects **Bill Me Later** on the Membership Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Bill me later	Gift	New Pledge

Gift Membership

This table shows the default field mappings for a gift membership part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Gift Recipient Name Fields	Individual Constituent	**New Name Fields** or link to existing individual
Gift Recipient Address Block	Individual Constituent	**Preferred Address** on new individual or update preferred address on existing individual
Gift Recipient Phone	Individual Constituent	"**Home**" **Phone Type** on preferred address, or can be used to link to existing individual
Gift Recipient Fax	Individual Constituent	"**Fax**" **Phone Type** on new preferred address, or can be used to link to existing individual
Gift Recipient Email	Individual Constituent	"**Email**" **Phone Type** on new preferred address, or can be used to link to existing individual
Send Renewal notices to	Constituent Membership	**Send renewal notices to**
Send benefits to	Constituent Membership	**Send benefits to** (Membership History tab)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Special Message	Constituent Membership	(1) **Reference** (Membership History tab) (2) **Special Message** (Gift or Membership)

Matching Gift

This table shows the default field mappings for the Matching Gift part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
My company will match my gift	Gift	Creates **Matching Gift Pledge** and updates form to capture company name
Company	Individual Constituent	**New Organization** or link to existing

Membership Form Acknowledgement Email

These sections show the default field mappings for the merge fields in the Membership Form part's acknowledgement email.

Donor

This table shows the default field mappings for the donor merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title	Individual Constituent	**Title 1** (Bio 1)
First Name	Individual Constituent	**First Name** (Bio 1)
Last name	Individual Constituent	**Last name** (Bio 1)
Address Lines	Individual Constituent	Address lines (Bio 1)
City	Individual Constituent	**City** (Bio 1)
State	Individual Constituent	**State** (Bio 1)
Zip code	Individual Constituent	**Zip code** (Bio 1)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Country	Individual Constituent	**Country** (Bio 1)
County	Individual Constituent	**County** (Bio 1)
NZ Suburb	Individual Constituent	For the New Zealand version: **SuburbCity** For the Australia version: **Suburb/State**
NZ City	Individual Constituent	For the New Zealand version: **SuburbCity** For the Australia version: **Suburb/State**
Phone	Individual Constituent	**"Home" Phone Type** on the Preferred Address
Email Address	Individual Constituent	**"Email" Phone Type** on the Preferred Address

Transaction

This table shows the default field mappings for transaction merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Gift Amount	Gift	**Amount**
Gift Type	Gift	**Gift type**
Gift Date	Gift	**Gift date**
Payment Method	Gift	**Pay method**
Number of Installments	Gift	No. Installments
Frequency	Gift	**Frequency**
Starting Date	Gift	Starting on
Ending Date	Gift	Installments due on
First Installment Amount	Gift	**Amount**

Transaction: Additional Donation

This table shows the default field mappings for the additional donation merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Amount	Gift	Amount

Transaction: Credit Card

This table shows the default field mappings for the credit card transaction merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Cardholder Name	Constituent	Constituent
Card Type	Gift	Card type
Card Number	Gift	Card no./exp.
Reference Number	Gift	ID

Transaction: Direct Debit

This table shows the default field mappings for the direct debit transaction merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Financial Institution	(1) Bank/Financial Institutions Relationship	(1) New Relationship or link to existing Bank/Financial Institution
	(2) Financial Institutions in The Raiser's Edge Configuration	(2) New Financial Institution or link to existing
	(3) Gift	(3) Bank
Branch Name	Bank/Financial Institutions Relationship	Branch name
Account Type	Bank/Financial Institutions Relationship	Account type

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Account Number	Bank/Financial Institutions Relationship	**Account number**
Routing Number	Bank/Financial Institutions Relationship	**Transit/Routing number**
Account Holder	None	Only used to process the transaction

Membership

This table shows the default field mappings for the membership merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Category	Membership	**Category**
Type	Membership	**Membership type**
Benefits	Membership	**Benefits**

Membership: Cards

This table shows the default field mappings for the cards merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Additional Name	Membership	**Members**
Relationship	Membership	**Relationship**
Is Child	Membership	**Number of children on this membership**
Card Requested	Membership	**Card**
Primary Name	Membership	**Members**
Number of Cards Requested	Membership	**No.**

Membership: Gift of Membership

This table shows the default field mappings for the gift of membership merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title	Membership	**Title 1** (Bio 1)
First Name	Membership	**First name**
Email Address	Membership	**Amount**
Send Benefits To	Gift	**Send benefits to**
Send Renewals To	Gift	**Send renewal notices to**
Special Message	Membership	**Special message**

Membership: Dues: Paid Membership

This table shows the default field mappings for the paid membership merge fields

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Amount	Membership	**Amount**

Payment Summary

This table shows the default field mappings for the Payment Summary part's merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Total cost	Gift	**Amount**

Personal Notes

This table shows the default field mappings for the Personal Notes part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Add/edit note	Note	**New or Updated Constituent Notepad**
		Author = Raiser's Edge user who processed it
		Type = Determined by user
		Date = Date note submitted
		Note = Personal note text

Personal Page Element

This table shows the default field mappings for the Personal Page Element part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Add/edit note	Note	See Personal Notes on page 157.

Personal Page Manager

This table shows the default field mappings for the Personal Page Manager part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Create personal page	Individual Constituent	(1) **New Individual** or link to existing
		(2) **New "Personal Page" Phone Type** on preferred address

Poll

This table shows the default field mappings for the Poll part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Respond to Poll	Constituent Attribute	New Attribute, Category is Raiser's Edge user defined

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Poll Response	Constituent Attribute	**Description**
Poll Question	Constituent Attribute	**Comments**
Poll Date Taken	Constituent Attribute	**Date**

Profile Form

These sections show the default field mappings for the Profile Form part.

Note: Constituent merge fields in emails you send from *Messages* use the same field mapping as the Profile Form part. Spouse merge fields use details from the Spouse Relationship record when the spouse check mark is selected on the constituent record, and Primary Business merge fields use details from the Primary Business Relationship record.

Bio Section

This table shows the default field mappings for the Bio section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title 1	Individual Constituent	**Title 1** (General tab — Bio 1)
Title 2	Individual Constituent	**Title 2** (General tab — Bio 1)
First Name	Individual Constituent	**First Name** (General tab — Bio 1)
Middle Name	Individual Constituent	**Middle Name** (General tab — Bio 1)
Last name	Individual Constituent	**Last name** (General tab — Bio 1)
Suffix 1	Individual Constituent	**Suffix 1** (General tab — Bio 1)
Suffix 2	Individual Constituent	**Suffix 2** (General tab — Bio 1)
Nickname	Individual Constituent	**Nickname** (General tab — Bio 1)
Maiden Name	Individual Constituent	**Maiden Name** (General tab — Bio 1)
Gender	Individual Constituent	**Gender** (General tab — Bio 1)
Birth Date	Individual Constituent	**Birth Date** (General tab — Bio 1)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Marital Status	Individual Constituent	**Marital Status** (General tab — Bio 1)
Requests no email	Individual Constituent	**Requests no email** (General tab — Bio 1)

Preferred Address Section

This table shows the default field mappings for the Preferred Address part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Country	Individual Constituent	**Country** (Addresses tab — Preferred Address)
Address Line 1	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 2	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 3	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 4	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
Address Line 5	Individual Constituent	**Address Lines** (Addresses tab — Preferred Address)
City	Individual Constituent	**City** (Addresses tab — Preferred Address)
NZ Suburb	Individual Constituent	For the New Zealand version: **SuburbCity** (General tab — Preferred Address) For the Australia version: **Suburb/State**
NZ City	Individual Constituent	For the New Zealand version: **SuburbCity** (General tab — Preferred Address) For the Australia version: **Suburb/State**
County	Individual Constituent	**County** (Addresses tab — Preferred Address)
State	Individual Constituent	**State** (Addresses tab — Preferred Address)
Zip code	Individual Constituent	**Zip code** (Addresses tab — Preferred Address)

Business Section

This table shows the default field mappings for the Business section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Organization Name	Organization Relationship	**Organization Name** (General tab — Primary Business)
Position	Organization Relationship	Position (General tab — Primary Business)
Profession	Organization Relationship	**Profession** (General tab — Primary Business)
Country	Organization Relationship	Country (General tab — Primary Business)
Address Line 1	Organization Relationship	
Address Line 2	Organization Relationship	**Address Lines** (General tab — Primary Business)
Address Line 3	Organization Relationship	Address Lines (General tab — Primary Business)
Address Line 4	Organization Relationship	**Address Lines** (General tab — Primary Business)
Address Line 5	Organization Relationship	Address Lines (General tab — Primary Business)
City	Organization Relationship	**City** (General tab — Primary Business)
NZ Suburb	Organization Relationship	For the New Zealand version: **SuburbCity** (General tab — Primary Business) For the Australia version: **Suburb/State**
NZ City	Organization Relationship	For the New Zealand version: **SuburbCity** (General tab — Primary Business) For the Australia version: **Suburb/State**
County	Organization Relationship	**County** (General tab — Primary Business)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
State	Organization Relationship	**State** (General tab — Primary Business)
Zip code	Organization Relationship	**Zip code** (General tab — Primary Business)
Industry	Organization Relationship	**Industry** (General tab — Primary Business)

Phones and Email Section

This table shows the default field mappings for the Phones and Email section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Home Phone	Constituent	"Home" phone type (Addresses tab — Preferred Address)
Business Phone (Individual only)	Organization Relationship	"Business" phone type (Primary business relationship)
Organization Phone	Constituent	"Business" phone type (Org 1 tab for organization record; Bio 1 tab for individual record)
Preferred Email	Constituent	"Email" phone type (Addresses tab — Preferred Address)
Website/URL	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity (Addresses tab — Preferred Address)
Additional Phone 1	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity (Addresses tab — Preferred Address)
Additional Phone 2	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity Addresses tab — Preferred Address)
Additional Phone 3	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity (Addresses tab — Preferred Address)
Additional Phone 4	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity(Addresses tab — Preferred Address)
Additional Phone 5	Constituent	Phone type set in *System Options*, in Blackbaud NetCommunity(Addresses tab — Preferred Address)

Spouse Section

This table shows the default field mappings for the Spouse section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Please remove this spouse from my record	Individual Relationship	Unchecks the "**This individual is the Spouse**" box. It does not delete the relationship record
Title 1	Individual Relationship	"Business" phone type (Primary business relationship)
Title 2	Individual Relationship	"Email" phone type (Addresses tab — Preferred Address)
First Name	Individual Relationship	**First name** (General tab 1 for spouse)
Middle Name	Individual Relationship	**Middle name** (General tab 1 for spouse)
Last name	Individual Relationship	**Last name** (General tab 1 for spouse)
Suffix 1	Individual Relationship	**Suffixes** (Bio 1)
Suffix 2	Individual Relationship	**Suffixes** (Bio 1)
Maiden Name	Individual Relationship	**Maiden name** (General tab 1 for spouse)
Class of	Individual Relationship	**Class of** (Individual is Spouse)

Constituent Attributes Section

This table shows the default field mappings for the Constituent Attributes section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Add or edit data	Constituent	New constituent or updated attribute

Primary Alumni Section

This table shows the default field mappings for the Primary Alumni section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Class of	Education/School Relationship	**Class of** (School tab — Primary alumni information)
School name	Education/School Relationship	**School name** (School tab — Primary alumni information)
Campus	Education/School Relationship	**Campus** (School tab — Primary alumni information)
School type	Education/School Relationship	**School type** (School tab — Primary alumni information)
Known name	Education/School Relationship	**Known name** (School tab — Primary alumni information)
Frat/Sorority	Education/School Relationship	Frat/Sorority (School tab — Primary alumni information)
Degree	Education/School Relationship	Degree (School tab — Primary alumni information)
GPA	Education/School Relationship	**GPA** (School tab — Primary alumni information)
Date entered	Education/School Relationship	**Date entered** (School tab — Primary alumni information)
Date graduated	Education/School Relationship	**Date graduated** (School tab — Primary alumni information)
Date left	Education/School Relationship	Date left (School tab — Primary alumni information)
Major	Education/School Relationship	**Major** (School tab — Primary alumni information)
Minor	Education/School Relationship	**Minor** (School tab — Primary alumni information)
Status	Education/School Relationship	**Status** (School tab — Primary alumni information)

Education Attributes Section

This table shows the default field mappings for the Education Attributes section.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Add or edit data	Education/School Relationship	New or Updated **Education Attribute** (School tab — Primary alumni information)

Survey

Survey data does not populate a specific Raiser's Edge field. Rather, survey data passes into the database and is accessible through *Query*. The data maps as indicated below.
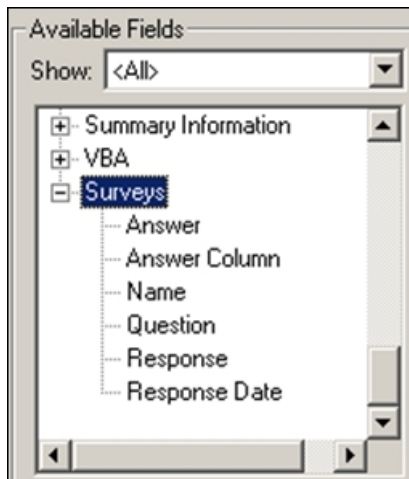
Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Survey Name	Query	**Survey -- Name**
Question	Query	**Survey -- Question**
Answer	Query	**Survey -- Answer**
Answer Column	Query	**Survey -- Answer Column**
Response Date	Query	**Survey -- Response Date**
Response	Query	**Survey -- Response**

Transaction Manager

The Transaction Manager does not populate a specific Raiser's Edge field. Rather, it displays a constituent's gift history from The Raiser's Edge. The table below explains each column of information you can include in the giving history.

Blackbaud NetCommunity Column	Raiser's Edge Record Type	Raiser's Edge Field
Amount	Individual Constituent	Gift amount
Anonymous	Individual Constituent	Gift is anonymous (Yes/No)
Balance	Individual Constituent	Pledge balance
Campaign Description	Individual Constituent	Campaign description
Campaign ID	Individual Constituent	Campaign ID
Date	Individual Constituent	Gift date
Fund ID	Individual Constituent	Fund ID
Fund Type	Individual Constituent	Fund description
Gift ID	Individual Constituent	Gift ID
Gift Subtype	Individual Constituent	Gift subtype
Gift Type	Individual Constituent	Gift type
Installment Frequency	Individual Constituent	Pledge installment frequency
Installment Schedule	Individual Constituent	Varies according to selected installment frequency
Number of Installments	Individual Constituent	Number of installments
Pay method	Individual Constituent	Pay method
Receipt number	Individual Constituent	Receipt no.
Receipt date	Individual Constituent	Receipt

User Education Profile Form

This table shows the default field mappings for the User Education Profile Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Update Form	Education/School Relationship	New or Updated **Education Relationship**
School Name	Education/School Relationship	**School name**
School Type	Education/School Relationship	**School type**
Alumni Information	Education/School Relationship	**Primary alumni information**
Campus	Education/School Relationship	**Campus**
Known name	Education/School Relationship	**Known name**
Frat/Sorority	Education/School Relationship	**Frat/Sorority**
Degree	Education/School Relationship	**Degree**
GPA	Education/School Relationship	**GPA**
Class of	Education/School Relationship	**Class of**
Date Entered	Education/School Relationship	**Date entered**
Date Left	Education/School Relationship	**Date left**
Date Graduated	Education/School Relationship	**Date graduated**
Major	Education/School Relationship	**Major**
Minor	Education/School Relationship	**Minor**
Status	Education/School Relationship	**Status**
Education Attribute(s)	Education/School Relationship	New or Updated **Education Attribute**

User Email Preferences Form

This table shows the default field mappings for the User Email Preferences Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Opt Out/Opt In	Constituent	Updates "**Requests no email**" (General tab — Bio 1)

User Interests Form

This table shows the default field mappings for the User Interests Form part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Update Interest(s)	Constituent Attribute	Add or Remove **Interest Attribute(s)**

User Login

This table shows the default field mappings for New User Registration for the User Login part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Title 1	Individual Constituent	**Titles** (General tab — Bio 1)
First Name	Individual Constituent	**First name** (General tab — Bio 1)
Last name	Individual Constituent	**Last name** (General tab — Bio 1)
Preferred Email	Individual Constituent	"Email" Phone Type in Blackbaud NetCommunity *System Options* (Preferred Address)
Address block	Individual Constituent	**Country**, Address lines, **City**, **State**, and **Zip code** (Addresses tab — Preferred Address)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Gender	Individual Constituent	**Gender** (General tab — Bio 1)
Maiden name	Individual Constituent	**Maiden name** (General tab — Bio 1)
Class of	Individual Constituent	Does not populate a Raiser's Edge field, but can be used for constituent matching
Birth date	Individual Constituent	**Birth date** (General tab — Bio 1)
ID	Individual Constituent	Does not populate a Raiser's Edge field, but can be used for constituent matching
Attributes	Constituent Attribute	Add or update attributes

Volunteer Acknowledgement Email

These sections show the default field mappings for the merge fields on the Volunteer Opportunity part's acknowledgement email.

Volunteer

This table shows the default field mappings for the volunteer merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
First Name	Constituent	**Volunteer name**
Last name	Constituent	**Volunteer name**
Email Address	Constituent	**Email**

Job

This table shows the default field mappings for the job merge fields.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Category	Job Assignment	Volunteer name
Description	Job Assignment	Description
End Date	Job Assignment	End date
Event Name	Job Assignment	Event
Minimum Age	Job Assignment	Minimum age
Name	Job Assignment	Job
Organization Name	Job Assignment	Organization
Position	Job Assignment	Position
Start Date	Job Assignment	Start date
Volunteer Type	Job Assignment	Volunteer type

Volunteer Opportunity

This table shows the default field mappings for the Volunteer Opportunity part.

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Sign-up for Job	(1) Constituent (2) Job Assignment	(1) **New Individual** or link to existing (2) **New Volunteer Job Assignment**
Birth Date	None	Used to qualify users during the job volunteer registration process
Emergency Contact Name	Constituent	**Volunteer Emergency Contact Name**
Emergency Contact Phone	Constituent	**Volunteer Emergency Contact Phone**
Emergency Contact Relationship	Constituent	**Volunteer Emergency Contact Relationship**
Vehicle Type	Constituent	**Volunteer Vehicle Information**
Skills and Experience	Constituent	**Volunteer Skills and Experience: Description** and **Skill Level** (if applicable)

Blackbaud NetCommunity Field/Action	Raiser's Edge Record Type	Raiser's Edge Field/Outcome
Courses and Training	Constituent	**Volunteer Courses and Training: Course Name** and **Certification** (if applicable)
Medical Information	Constituent	**Volunteer Medical Information: Description**
Special Needs	Constituent	**Volunteer Special Needs: Description**
Interests	Constituent	**Volunteer Interests**
Checklist Items	Constituent	**Volunteer Checklist: Checklist Item**
Additional Information	Job Assignment	Can be added to Assignment Notes in the NetCommunity Interface
Volunteer Type (set in the part)	Constituent	**Volunteer Type**

Sign-up can only be completed by registered users. The form will direct persons to log-in or register. If the user registers, he or she will be redirected back to the form upon completion. In The Raiser's Edge, the Sign-Up Request must be processed first. After it has been, a User Profile Update and Volunteer Request transaction will appear.