



GiftMaker Pro and EventMaker Pro 8.5 Update Guide

101706

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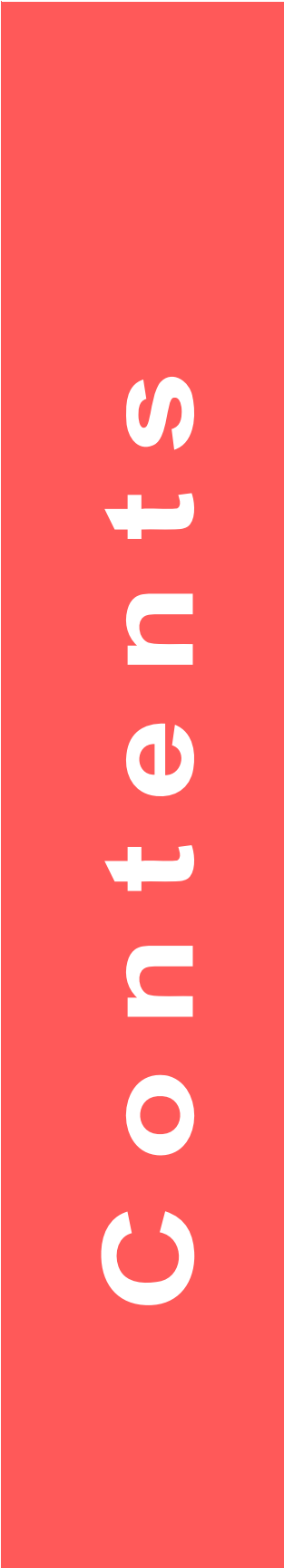
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GMP8.5-Update-101706

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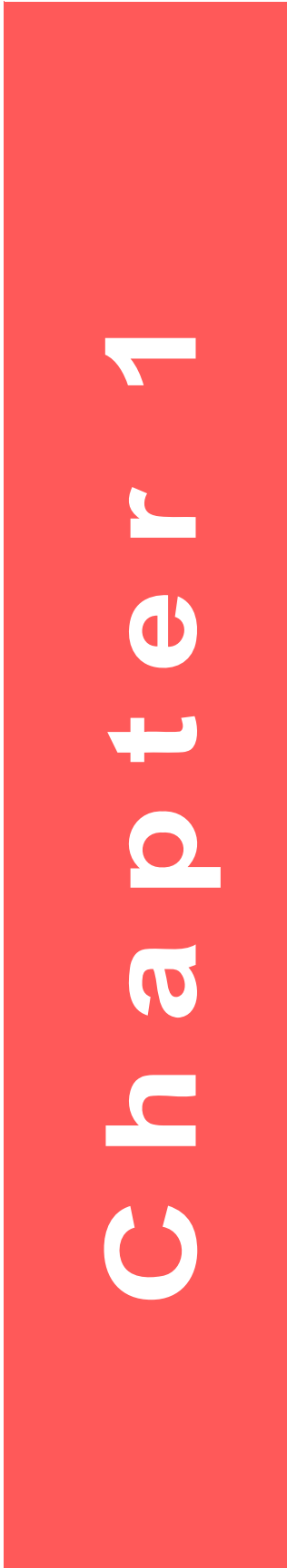
Installation


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 Before you update to *GiftMaker Pro* or *EventMaker Pro* 8.5, make sure you have a current and reliable backup of your data file.

In January 2006, we announced Blackbaud's acquisition of Campagne Associates and affirmed our commitment to continue supporting *GiftMaker Pro* through December 2007. In keeping with this commitment, we are pleased to release version 8.5 of *GiftMaker Pro*. This update includes a new reporting option for Classification Codes and new merge fields for the popular Instant Thank You letter feature. We have also improved some areas for *GiftMaker Pro* and *EventMaker Pro* identified as problematic for our users. For more information about the improvements provided in version 8.5, see "Product Improvements" on page 29.

In June 2006, Blackbaud released the conversion utility and the corresponding *GiftMaker Pro* edition of *The Raiser's Edge*. Hundreds of clients have now used the conversion utility to move their *GiftMaker Pro* data into *The Raiser's Edge*. For more information about *The Raiser's Edge* and your conversion options, contact your account manager at 1-800-582-3489.

For assistance with *GiftMaker Pro*, *EventMaker Pro*, and *WebCampaigns*, contact Customer Support at 1-800-468-8996 and follow the options for *GiftMaker Pro* Support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).

This chapter provides installation instructions for various operating systems and installation scenarios. If you have *GiftMaker Pro* or *EventMaker Pro* installed on multiple workstations, regardless of the operating system, see "Installing or Updating on Multiple Workstations" on page 25 before you install or update the program.

- **Windows installation** – To install *GiftMaker Pro* or *EventMaker Pro* for the first time or update to version 8.5 from version 8.4 or earlier, see "Installing or Updating on a Windows Operating System" on page 2.
- **Macintosh installation** – To install *GiftMaker Pro* or *EventMaker Pro* for the first time or update to version 8.5 from version 8.4 or earlier, see "Installing or Updating on a Macintosh Operating System" on page 15.

Installing or Updating on a Windows Operating System

The following procedures explain how to update or install *GiftMaker Pro* or *EventMaker Pro* 8.5 on a Windows operating system.

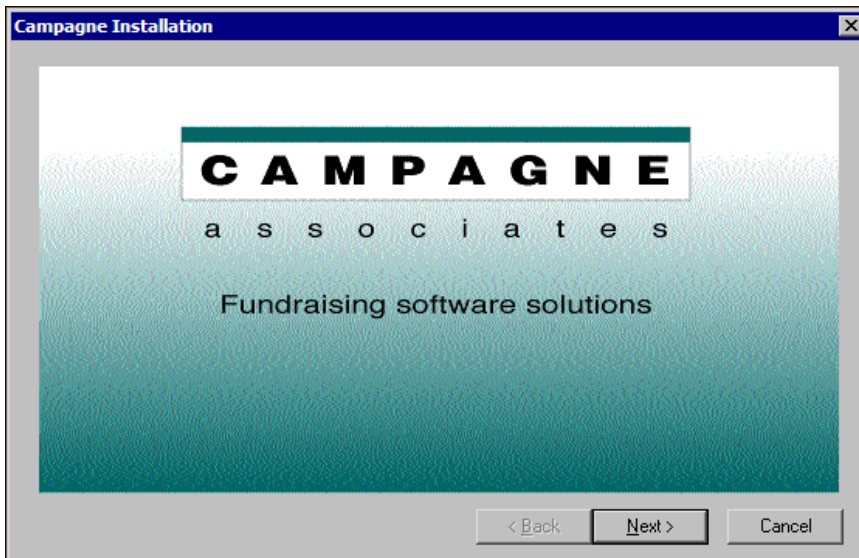
- To update from *GiftMaker Pro* or *EventMaker Pro* 8.4, see "Updating from GiftMaker Pro or EventMaker Pro 8.4 on a Windows operating system" on page 3.
- To update from *GiftMaker Pro* or *EventMaker Pro* 8.3 or earlier or install the program on a new workstation, see "Installing GiftMaker Pro or EventMaker Pro 8.5 on a new workstation or updating from version 8.3 or earlier on a Windows operating system" on page 8.

 If you have *GiftMaker Pro* or *EventMaker Pro* installed on multiple workstations, see "Installing or Updating on Multiple Workstations" on page 25 before you install or update the program.

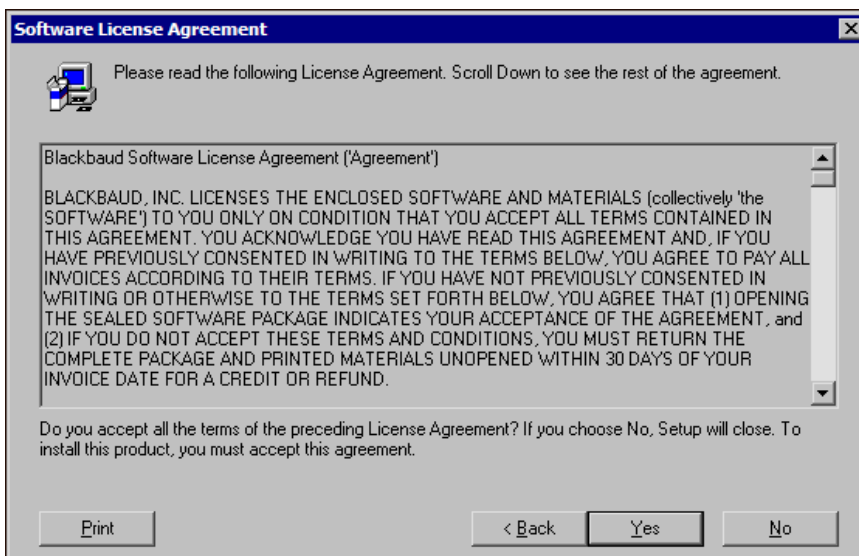
➤ **Updating from GiftMaker Pro or EventMaker Pro 8.4 on a Windows operating system**


If you update from version 8.4, *GiftMaker Pro* and *EventMaker Pro 8.5* do not require a data migration or a new serial number.

1. Before you update the program, make sure you have a current and reliable backup of your data files.
2. From the Blackbaud Web site (www.blackbaud.com), select **Support, Downloads** from the menu bar. The Downloads page appears.
3. Click **GiftMaker Pro** and download and save the setup file to your desktop.
4. To launch the installation, double-click the 85setup.exe file. The Campaigne Installation screen appears.

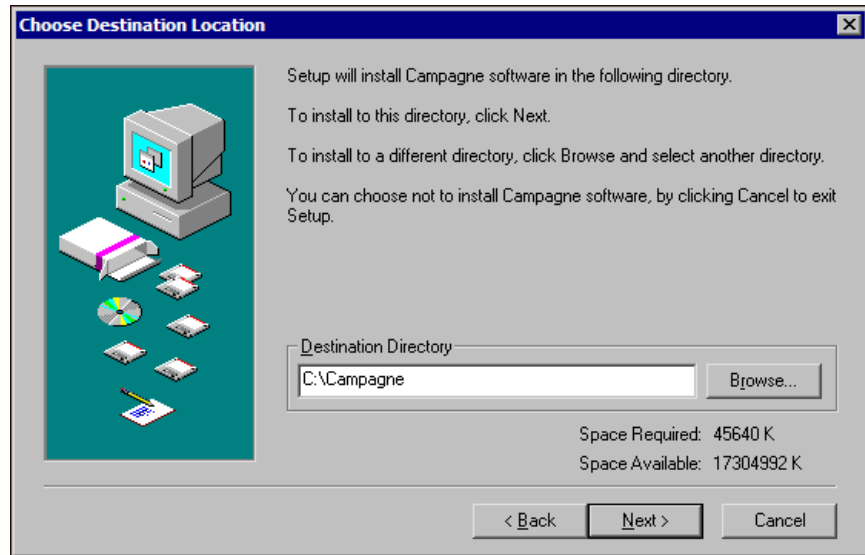


5. Click **Next**. The Software License Agreement screen appears.



 If you experience difficulty downloading the 85setup.exe file from the Web site and request a CD from GiftMaker Pro Customer Support, insert the CD in your CD-ROM drive and double-click the setup.exe file.

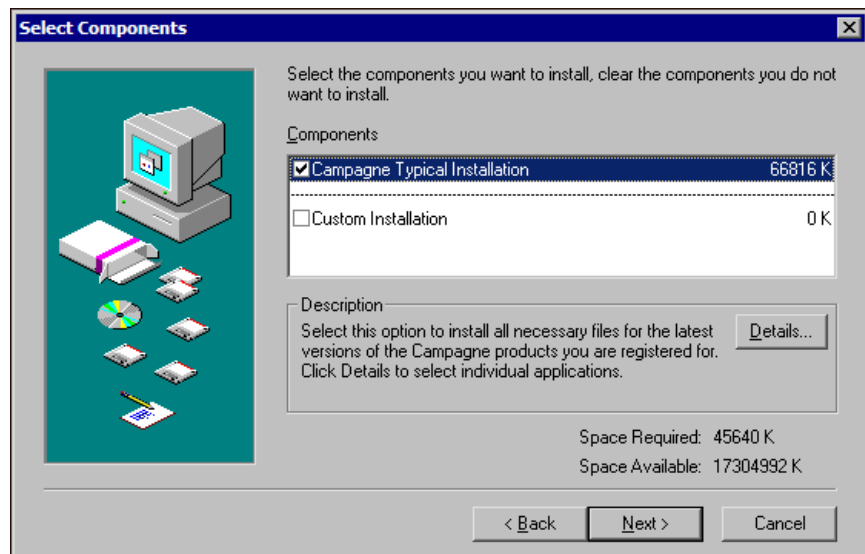
- Review the License Agreement. To accept the terms of the license and proceed with the installation, click **Yes**. The Choose Destination Location screen appears.



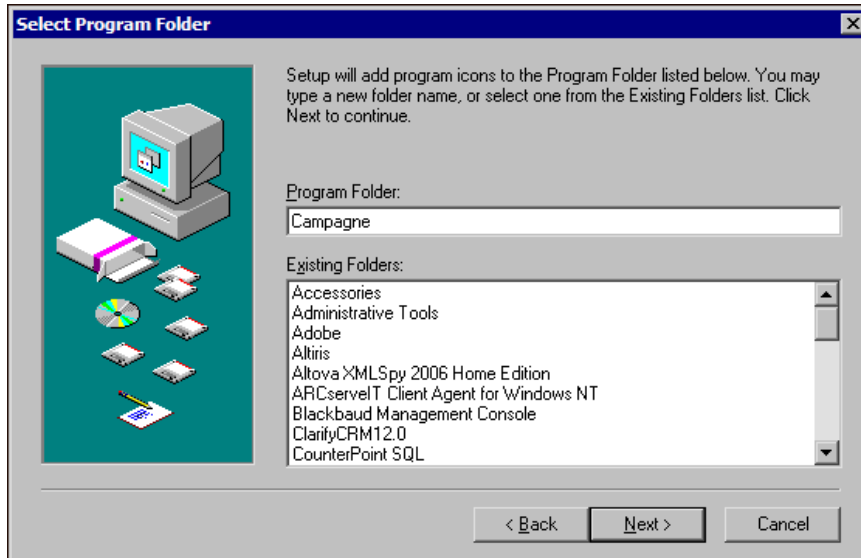
- In the **Destination Directory** field, enter the location to install the Campagne software files. By default, the location is set for “C:\Campagne”.

To install the files in a different directory, click **Browse** and map to the location. If you **Browse** to the location, select the top level of the Campagne directory and not a subsequent program directory.

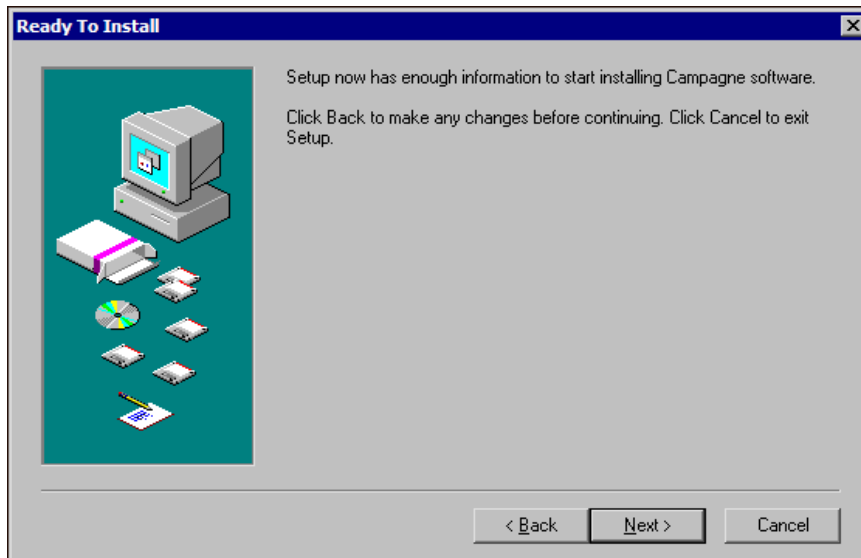
- Click **Next**. The Select Components screen appears.




9. In the **Components** box, **Campagne Typical Installation** is selected by default. The **Campagne Typical Installation** automatically installs or updates the items based on what you have currently installed. Click **Next**. The Select Program Folder screen appears.



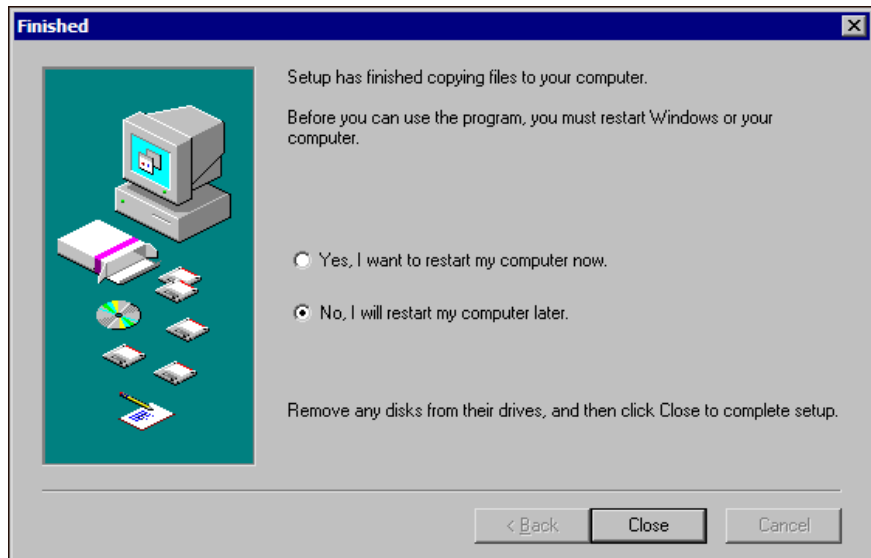
10. The default **Folder Name** is “Campagne”. This is the group name for the shortcut to the run the program that appears under **Programs** on the **Start** menu. To accept the default setting and install shortcuts to the program on the **Start** menu and desktop, click **Next**. The Ready to Install screen appears.



11. To adjust any selections, click **Back** to the applicable screen of the Installation Wizard. To begin the installation, click **Next**. The installation begins.

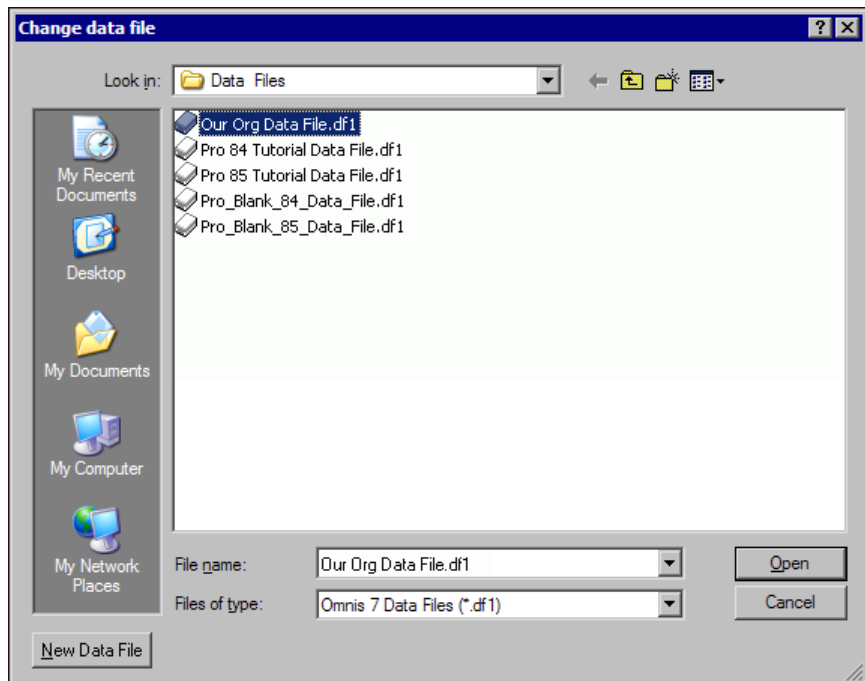
 The **Custom Installation** enables you to install or reinstall individual components of the update.

- When the installation is complete, the Finished screen appears and asks whether you want to restart the computer.



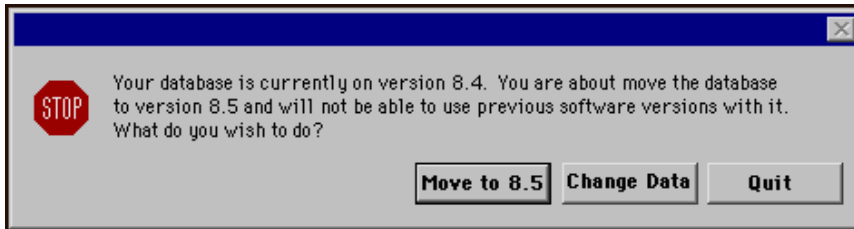
You do not need to restart your computer. Select **No, I will restart my computer later** and click **Close**.

- At the location of the **Destination Directory**, as specified on the Choose Destination Location screen, access the Campagne directory and open *GiftMaker Pro 8.5*. The Change data file screen appears.



- Locate and select your data file and click **Open**.

15. If you are the first user to access *GiftMaker Pro 8.5*, a message appears to ask whether to update the database to version 8.5. Click **Move to 8.5**.



The *GiftMaker Pro* installation is complete and ready for use. The Sign on screen appears.


16. On the Sign on screen, select a user name and click **Sign On**.



If a password is required, the Security password entry screen appears. In the **Please enter your password** field, enter your password.

17. If someone in your organization uses *EventMaker Pro* frequently, you may want to create a desktop shortcut to that program for easy access. You can modify the properties of an older shortcut to *EventMaker Pro* or copy and edit the new shortcut installed for *GiftMaker Pro 8.5*. For more information about creating a shortcut for *EventMaker Pro*, contact GiftMaker Pro Customer Support.
18. To clean up your desktop, you can delete the downloaded setup file. Do not delete the new shortcut installed for *GiftMaker Pro 8.5*.

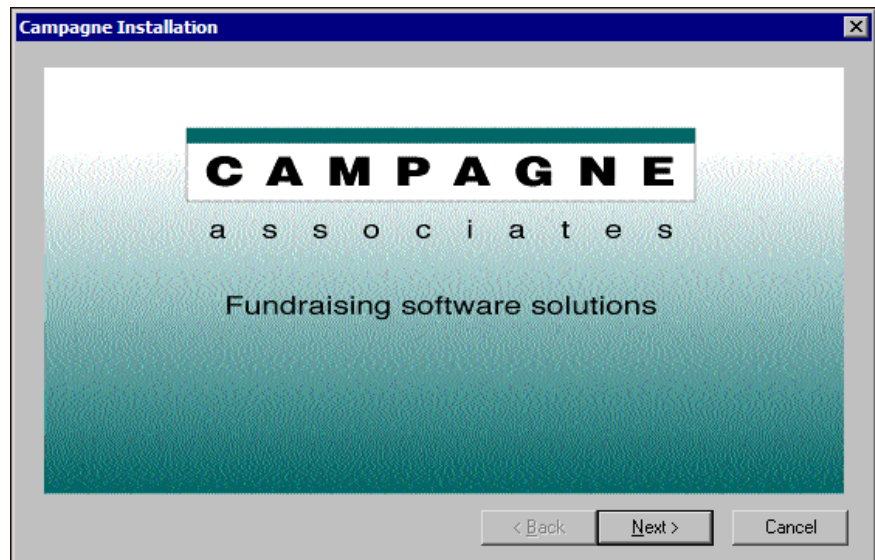
 To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).

 If you experience difficulty downloading the 85setup.exe file from the Web site and request a CD from GiftMaker Pro Customer Support, insert the CD in your CD-ROM drive and double-click the setup.exe file.

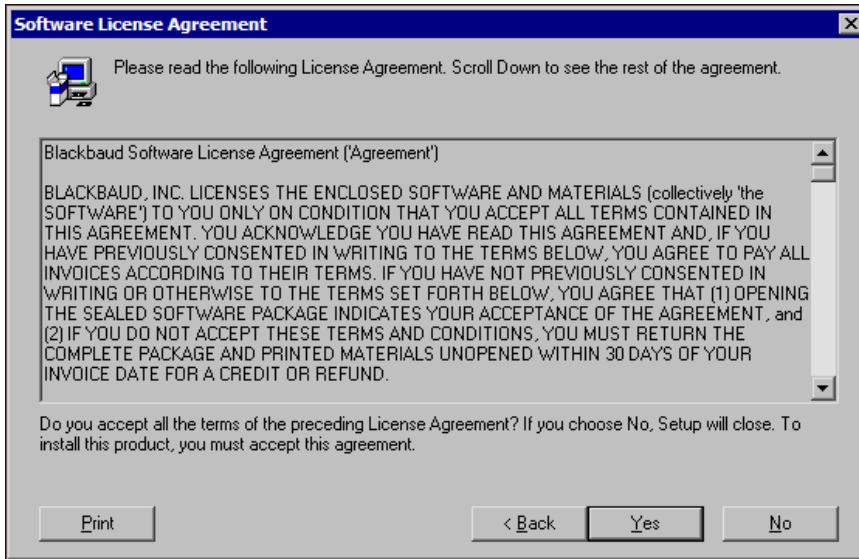
➤ **Installing GiftMaker Pro or EventMaker Pro 8.5 on a new workstation or updating from version 8.3 or earlier on a Windows operating system**

If you are installing *GiftMaker Pro* or *EventMaker Pro 8.5* on a new workstation or updating from version 8.3 or earlier, you must have *Campagne* and *Omnis 7* serial numbers and must allow additional time for the data migration process.

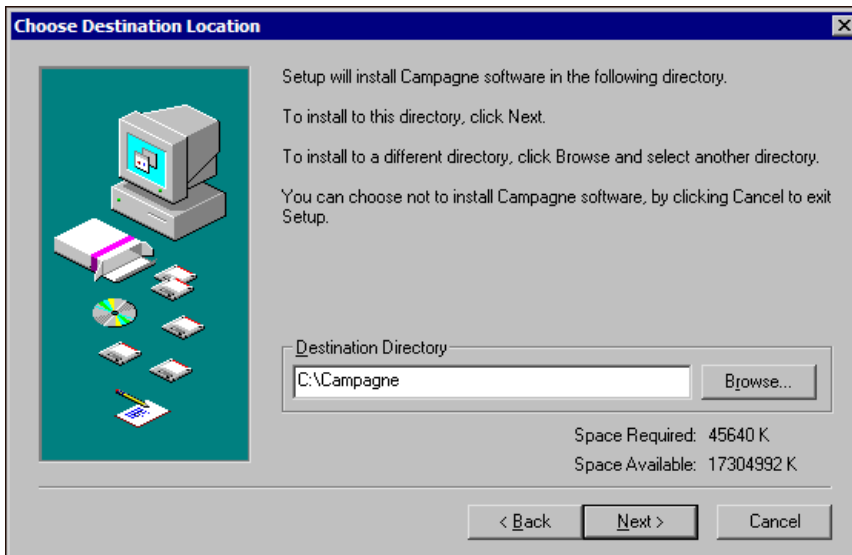
1. Before you update the program, make sure you have a current and reliable backup of your data file.
2. From the Blackbaud Web site (www.blackbaud.com), select **Support, Downloads** from the menu bar. The Downloads page appears.
3. Click **GiftMaker Pro** and download and save the setup file to your desktop.
4. To launch the installation, double-click the 85setup.exe file. The Campaigne Installation screen appears.



5. Click **Next**. The Software License Agreement screen appears.



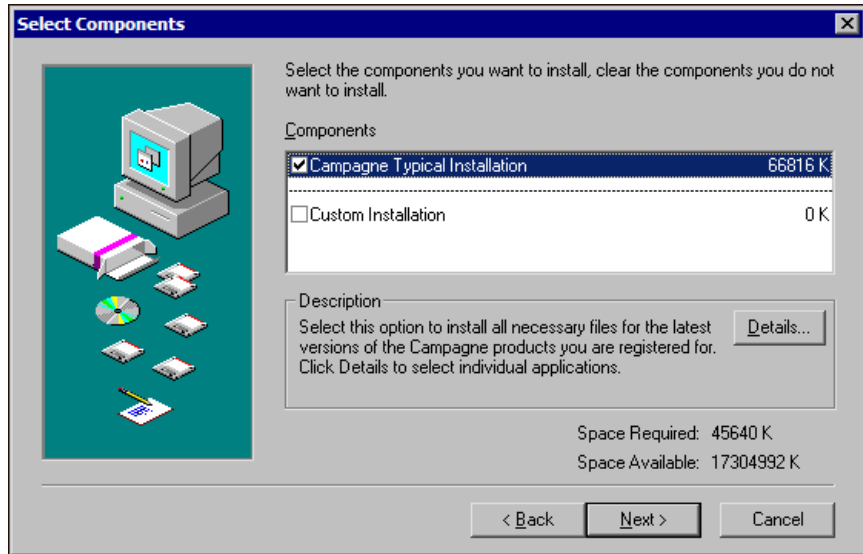
6. Review the license agreement. To accept the terms of the license and proceed with the installation, click **Yes**. The Choose Destination Location screen appears.




7. In the **Destination Directory** field, enter the location to install the Campagne software files. By default, the location is set for "C:\Campagne".

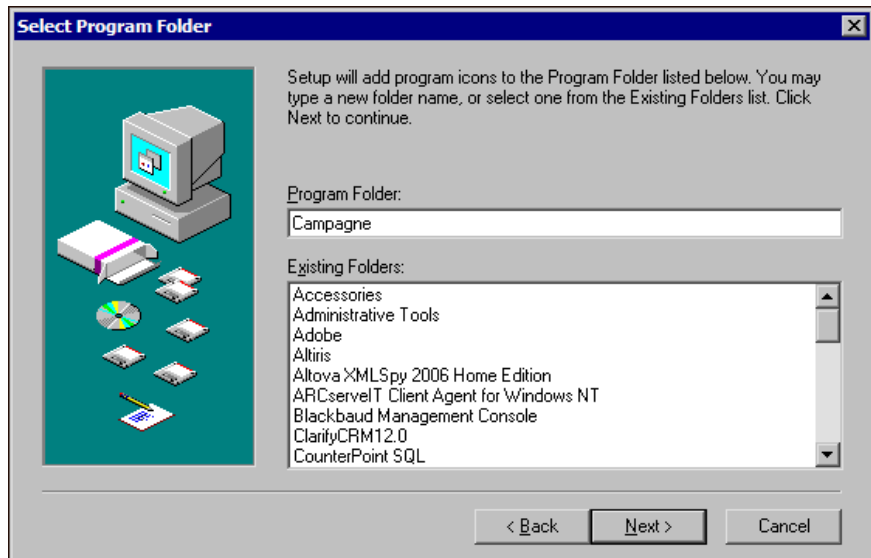
To install the files in a different directory, click **Browse** and map to the location. If you **Browse** to the location, select the top level of the Campagne directory and not a subsequent program directory.

- Click **Next**. The Select Components screen appears.

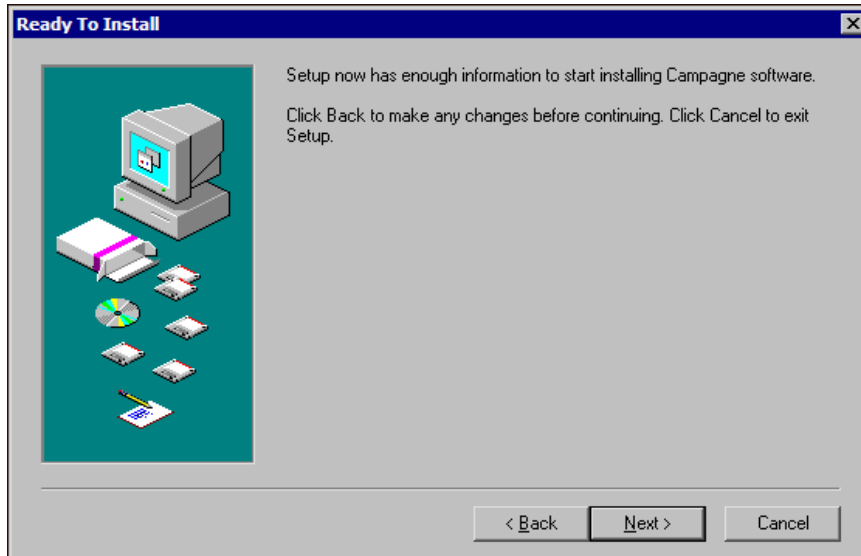


 The **Custom Installation** enables you to install or reinstall individual components of the update.

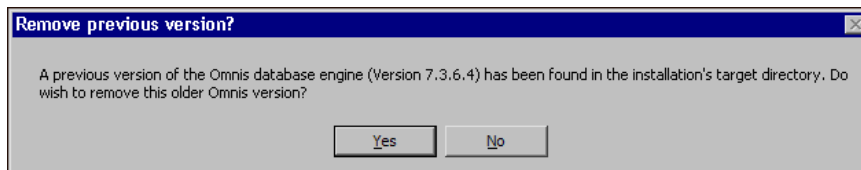
- In the **Components** box, **Campagne Typical Installation** is selected by default. The **Campagne Typical Installation** automatically installs or updates the items based on what you have currently installed. Click **Next**. The Select Program Folder screen appears.



10. The default **Folder Name** is “Campagne”. This is the group name for the shortcut to the program that appears under **Programs** on the **Start** menu. To accept the default setting and install shortcuts to the program on the **Start** menu and desktop, click **Next**. The Ready to Install screen appears.

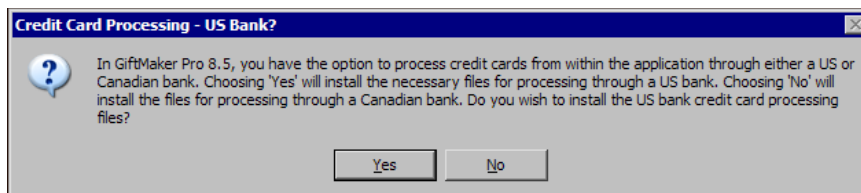


11. To adjust any selections, click **Back** to the applicable screen of the Installation Wizard. Click **Next**.
12. If you are updating from *GiftMaker Pro 7.9* or earlier, a message appears to ask whether to remove the previous version of *Omnis 7*.





You do not need to overwrite your previous version of *Omnis 7*. Click **No**.

13. Some installations require identification of the banking system used for credit card processing. Though you may not use the credit card processing feature at this time, select the proper country to avoid reinstalling the program at a later date.

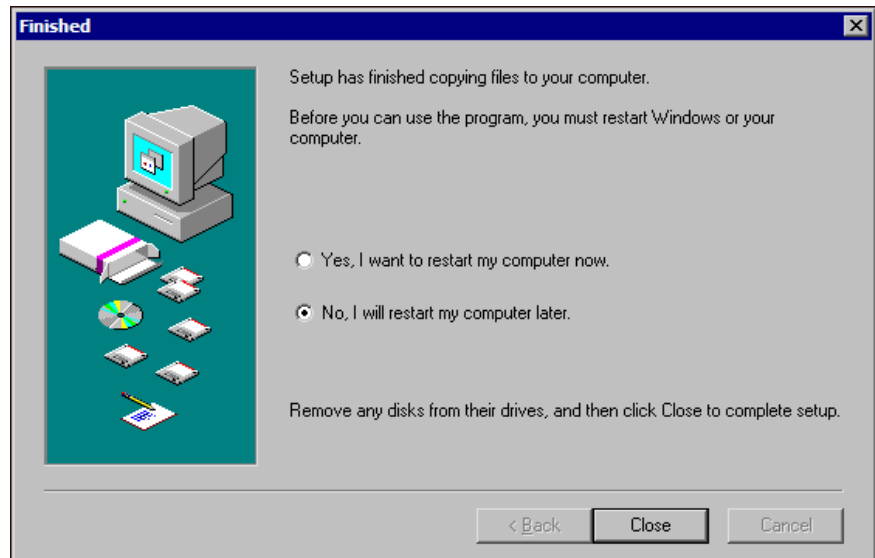


If your banking system is in the United States, click **Yes**. If your banking system is in Canada, click **No**. The installation begins and the Setup screen appears to track the installation progress.


 *Omnis 7* is the database engine used for *GiftMaker Pro*.

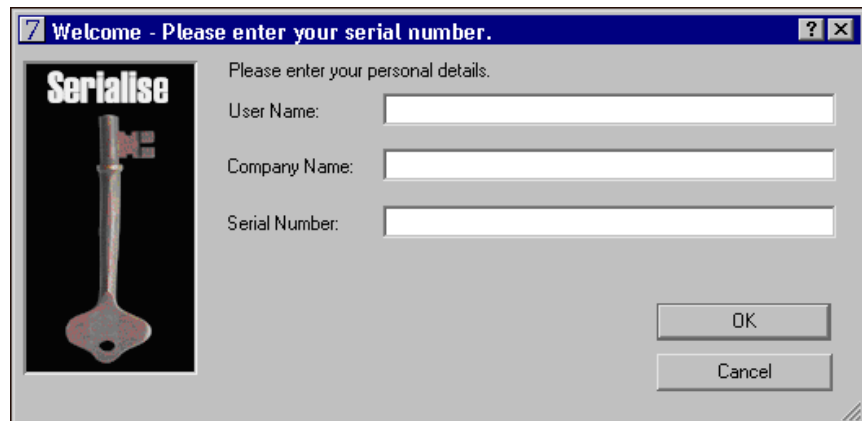
 Credit card processing functions cannot operate until you complete a merchant agreement with IATS/Ticketmaster.

When the installation is complete, the Finished screen appears to ask whether you want to restart the computer.

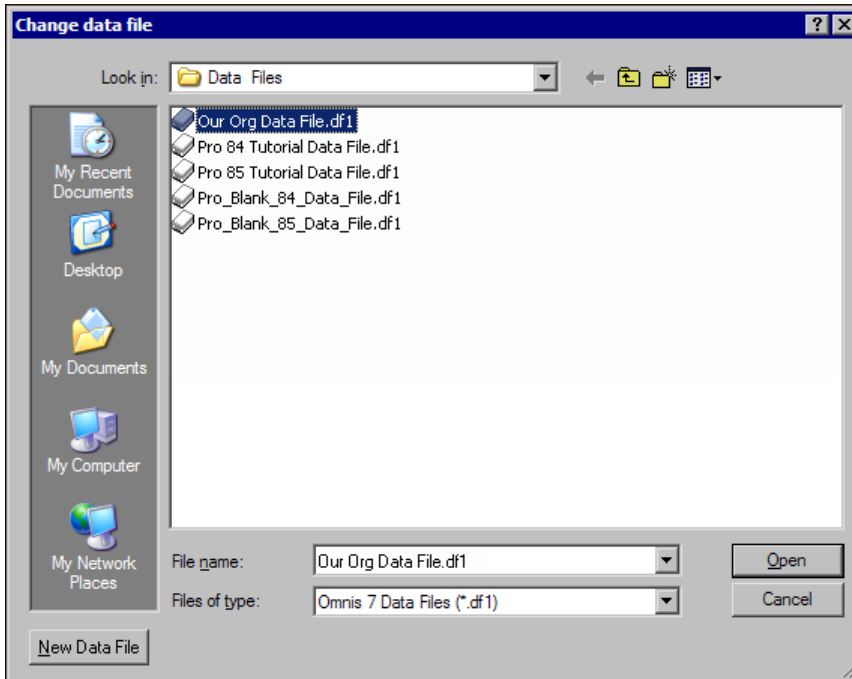


14. You do not need to restart your computer. Select **No, I will restart my computer later** and click **Close**.
15. At the location of the **Destination Directory**, as specified on the Choose Destination Location screen, access the Campagne directory and open *GiftMaker Pro 8.5*.
16. If you are updating from version 7.9 or earlier or are installing *GiftMaker Pro* or *EventManager Pro* on the workstation for the first time, you must serialize *Omnis 7*. The *Omnis 7* Welcome/Serialise screen appears. Enter your personal details and *Omnis 7* **Serial Number** and click **OK**.

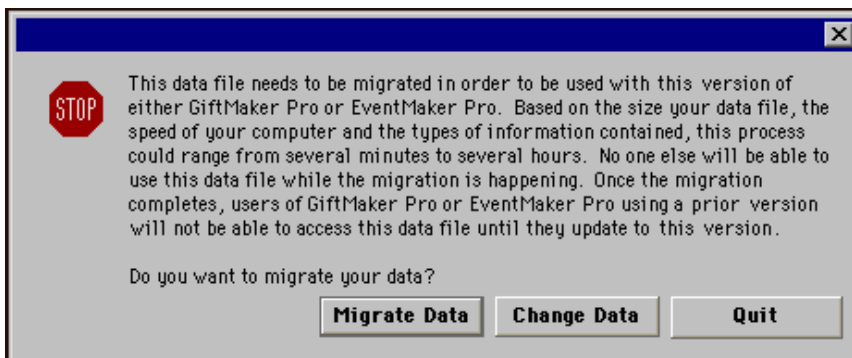
 Do not cancel the installation before you serialize *Omnis 7*. If you cancel the installation before serializing *Omnis 7*, you will have a single-user version of *Omnis 7*. If your license is for multiple users, you will encounter problems when logging on when other users are in the program.



17. The Change data file screen appears. Locate and select your data file.



18. Click **Open**. A message appears to confirm your data file selection.



19. Click **Migrate Data**. The Campagne Serial Number Information screen appears.

 Version 8.5 accepts serial numbers from version 8.4 or 8.5. If you cannot locate your 8.4 serial numbers, contact Customer Support. To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).

20. In the **Enter your Campagne Serial Number** field, enter the Campagne serial number for your copy of *GiftMaker Pro* or *EventMaker Pro*.
21. Click **Start Migration**. A message appears to confirm you have a backup of your current data file.

22. Verify you have a backup of your current data file and click **Proceed**.
If you are unsure whether a current backup of your current data file exists, click **Quit** and back up the data file. For information about how to back up the data file, see the *GiftMaker Pro Reference Manual*.

23. The data file begins to migrate to version 8.5. When the migration is complete, the Sign on screen appears. Select a user name and click **Sign On**.




If a password is required, the Security password entry screen appears. In the **Please enter your password** field, enter your password.


24. If someone in your organization uses *EventMaker Pro* frequently, you may want to create a desktop shortcut to that program for easy access. You can modify the properties of an older shortcut to *EventMaker Pro* or copy and edit the new shortcut installed for *GiftMaker Pro 8.5*. For more information about creating a shortcut for *EventMaker Pro*, contact GiftMaker Pro Customer Support.
25. To clean up your desktop, you can delete the downloaded setup file. Do not delete the new shortcut installed for *GiftMaker Pro 8.5*.

Installing or Updating on a Macintosh Operating System

The following procedures explain how to update or install *GiftMaker Pro* or *EventMaker Pro 8.5* on a Macintosh operating system.

- To update from *GiftMaker Pro* or *EventMaker Pro 8.4*, see “Updating from GiftMaker Pro or EventMaker Pro 8.4 on a Macintosh operating system” on page 16.
- To update from *GiftMaker Pro* or *EventMaker Pro 8.3* or earlier or install the program on a new workstation, see “Installing GiftMaker Pro or EventMaker Pro 8.5 on a new workstation or updating from version 8.3 or earlier on a Macintosh operating system” on page 19.

 The migration processing time varies depending on the size of the data file, location of the data file, and other computer configurations. Most data file migrations should complete within an hour.


 To contact Customer Support, call 1-800-468-8996 and select the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).

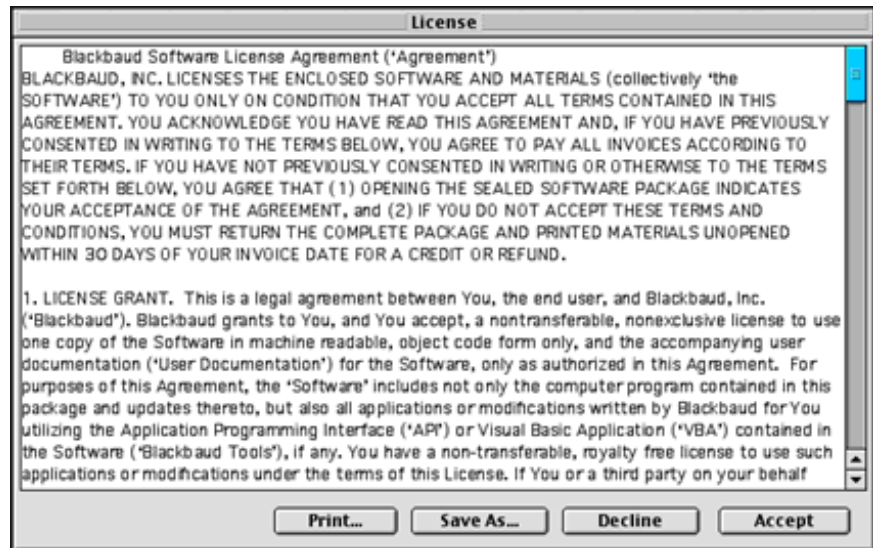
 If you have *GiftMaker Pro* or *EventMaker Pro* installed on multiple workstations, see “Installing or Updating on Multiple Workstations” on page 25 before you install or update the program.

➤ **Updating from GiftMaker Pro or EventMaker Pro 8.4 on a Macintosh operating system**

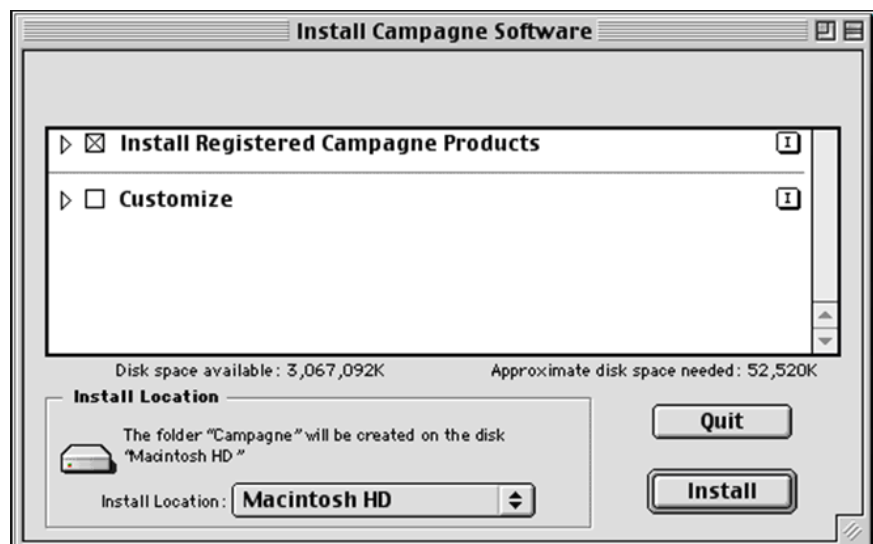
If you update from version 8.4, *GiftMaker Pro* and *EventMaker Pro* 8.5 does not require a data migration or a new serial number.

1. Before you update the program, make sure you have a current and reliable backup of your data files.
2. From the Blackbaud Web site (www.blackbaud.com), select **Support, Downloads** from the menu bar. The Downloads page appears.
3. Click **GiftMaker Pro** and download and save the install file to your desktop.
4. To launch the installation, double-click **Install Campagne Software**. The License screen appears.

 If you experience difficulty downloading the setup file from the Web site and request a CD from GiftMaker Pro Customer Support, insert the CD in your CD-ROM drive and double-click **Install Campagne Software**.



5. Review the license agreement. To accept the terms of the license agreement, click **Accept**. The Install Campagne Software screen appears.

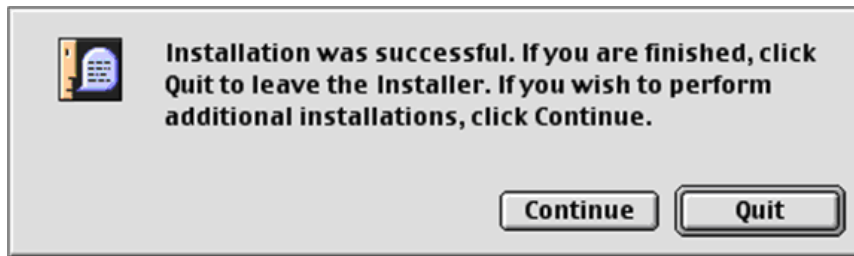


- In the box, **Install Registered Campagne Products** is selected by default. This selection automatically installs or updates the items based on what you have currently installed.


In the **Install Location** field, select the drive where to install the “Campagne” folder. By default, the **Install Location** is the local hard drive.

- Click **Install**. The installation begins.

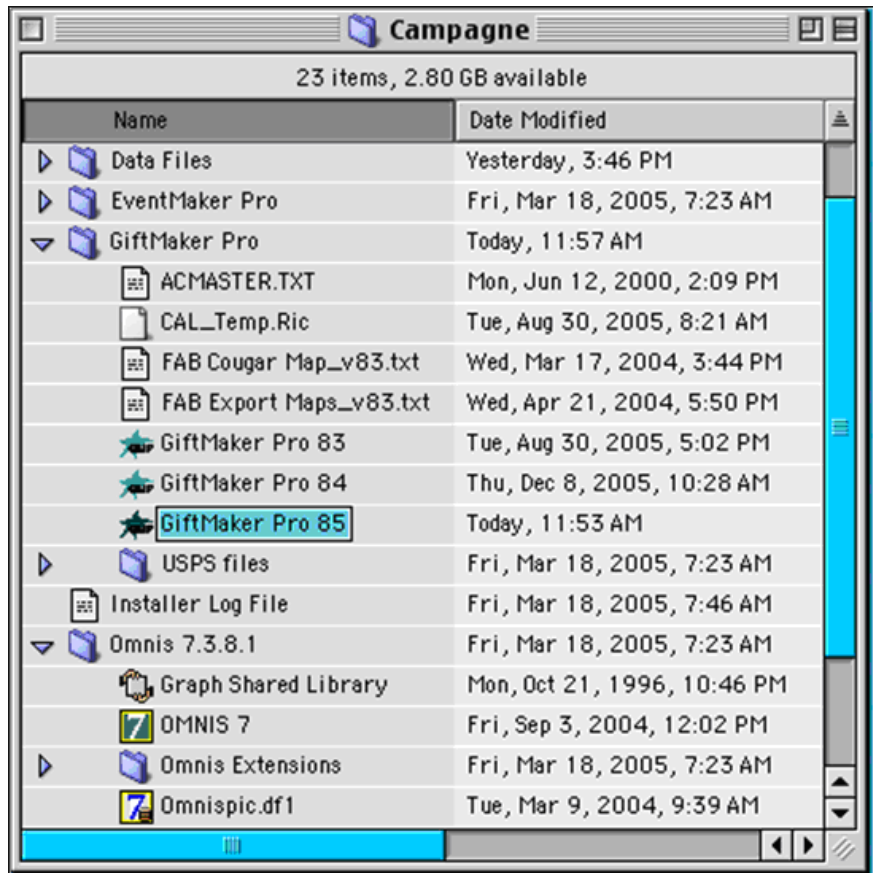
When the installation is complete, a message appears to inform you that the installation was successful.



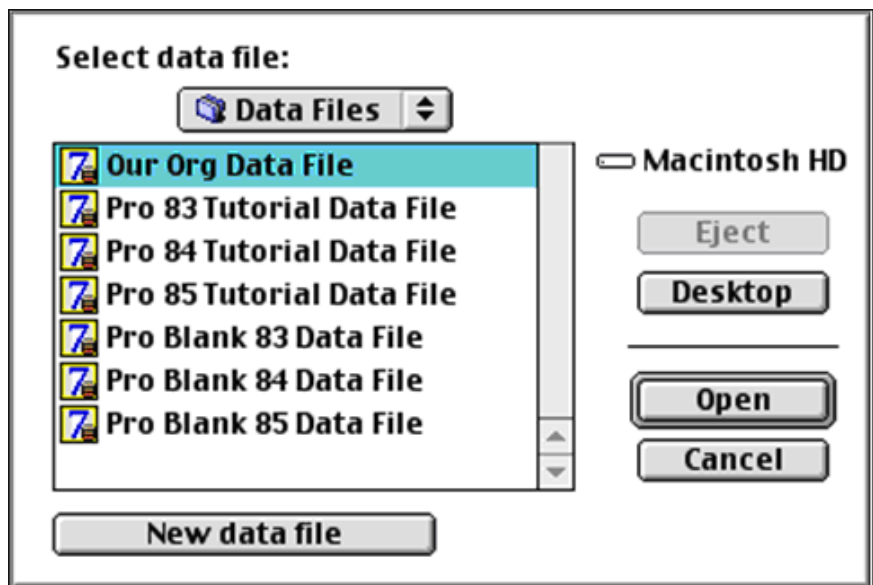
- Click **Quit**.
- Access the Campagne folder at the **Install Location** specified on the Install Campagne Software screen.

 If you select **Customize**, you can install or reinstall individual components of the update.

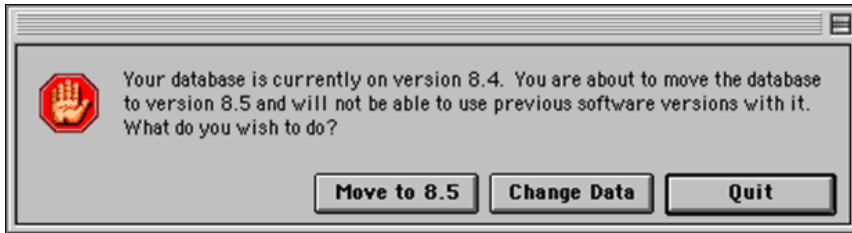
10. In the Campagne folder, open the Omnis 7.3.8.1 folder and GiftMaker Pro folder.



11. Click and drag the **GiftMaker Pro 85** icon in the "GiftMaker Pro" folder over the **OMNIS 7** icon in the "Omnis 7.3.8.1" folder. *GiftMaker Pro 8.5* opens and the Select data file screen appears.



12. Locate and select your data file and click **Open**.
13. If you are the first user to access *GiftMaker Pro 8.5*, a message appears to ask whether to update the database to version 8.5. Click **Move to 8.5**. The *GiftMaker Pro* installation is complete and ready for use.



The Sign on screen appears.

14. On the Sign on screen, select a user name and click **Sign On**.




If a password is required, the Security password entry screen appears. In the **Please enter your password** field, enter your password.

15. To clean up your desktop, you can delete the downloaded setup file. Do not delete the new shortcut installed for *GiftMaker Pro 8.5*.

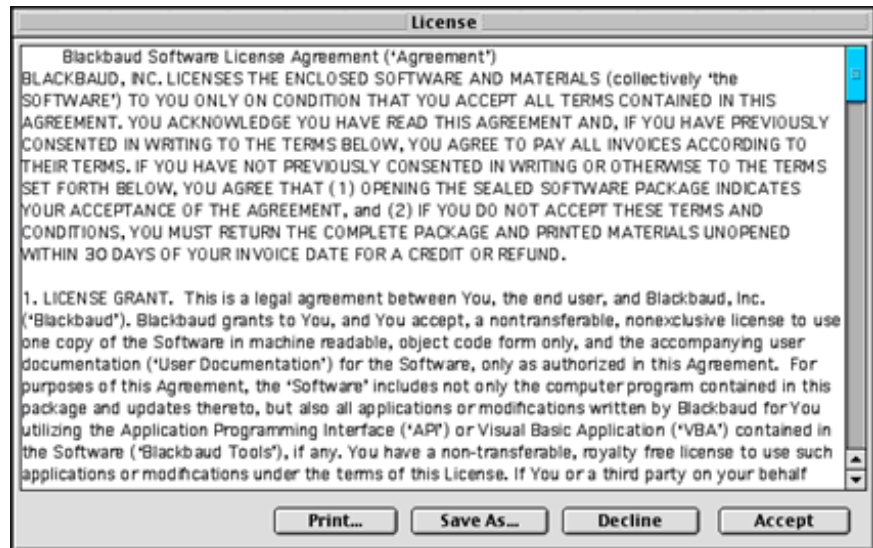
➤ **Installing GiftMaker Pro or EventMaker Pro 8.5 on a new workstation or updating from version 8.3 or earlier on a Macintosh operating system**

If you are installing *GiftMaker Pro* or *EventMaker Pro 8.5* on a new workstation or are updating from version 8.3 or earlier, you must have Campaign and *Omnis 7* serial numbers and must allow additional time for the data migration process.

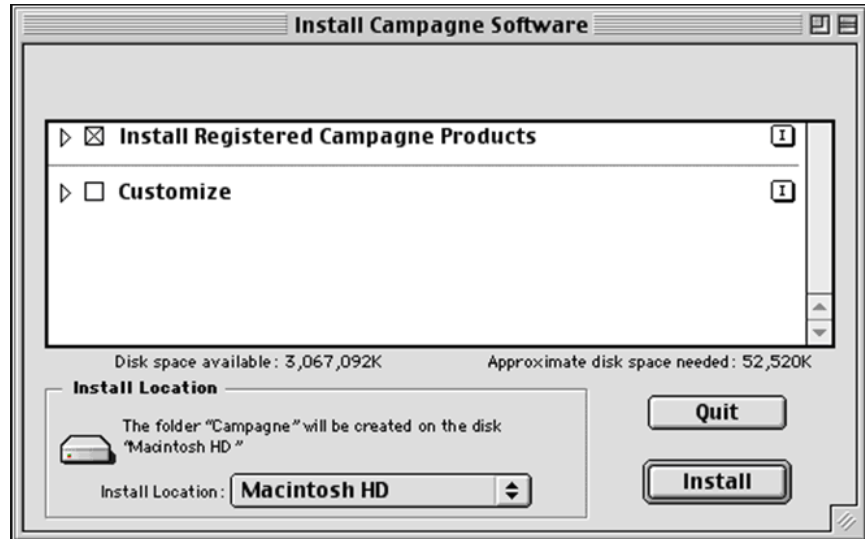
1. Before you update the program, make sure you have a current and reliable backup of your data file.
2. From the Blackbaud Web site (www.blackbaud.com), select **Support, Downloads** from the menu bar. The Downloads page appears.


 If you experience difficulty downloading the install file from the Web site and request a CD from GiftMaker Pro Customer Support, insert the CD in your CD-ROM drive and double-click **Install Campagne Software**.

3. Click **GiftMaker Pro** and download and save the install file to your desktop.
4. To launch the installation, double-click **Install Campagne Software**. The License screen appears.



5. Review the license agreement. To accept the terms of the license agreement, click **Accept**. The Install Campagne Software screen appears.



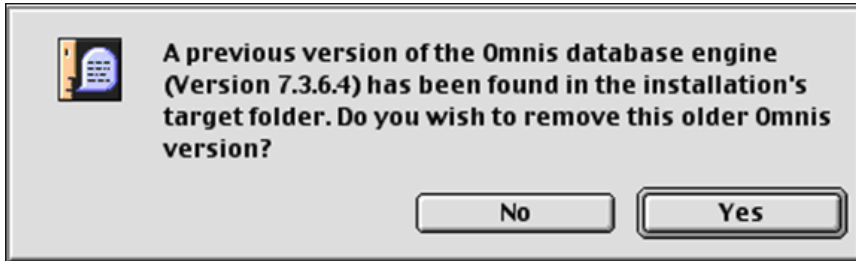
 If you select **Customize**, you can install or reinstall individual components of the update.

6. In the box, **Install Registered Campagne Products** is selected by default. This selection automatically installs or updates the items based on what you have currently installed.

In the **Install Location** field, select the drive where to install the “Campagne” folder. By default, the **Install Location** is the local hard drive.

7. Click **Install**. The installation begins.


- If you are updating from version 7.9 or earlier, a message appears to ask whether to remove the previous version of *Omnis 7*. You do not need to overwrite your previous version of *Omnis 7*. Click **No**.



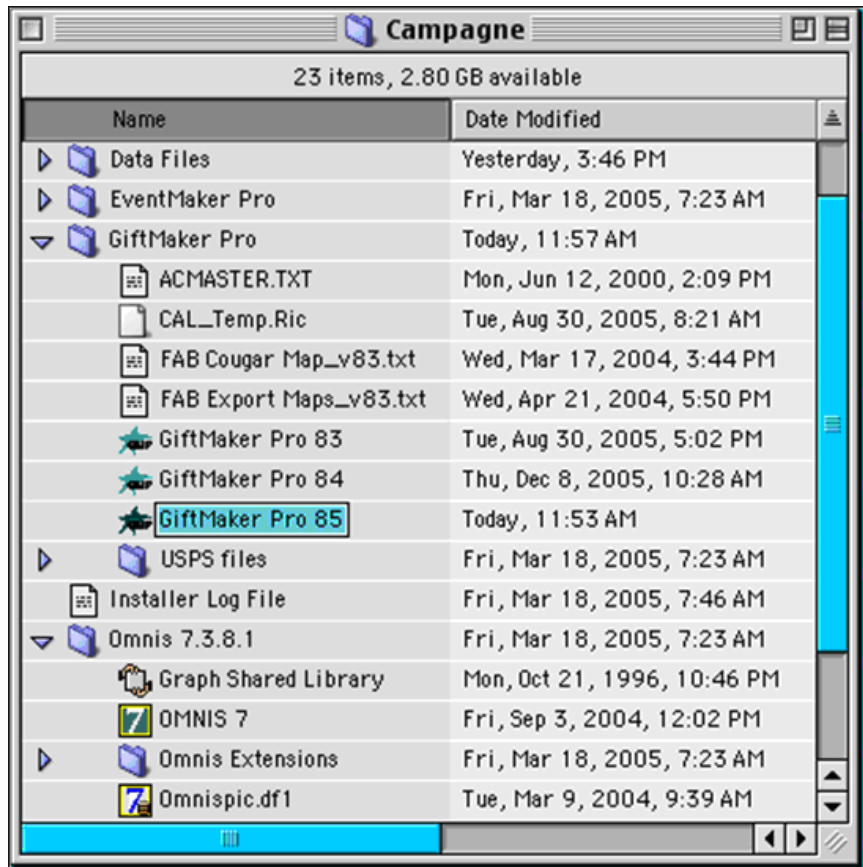
- When the installation is complete, a message appears to inform you that the installation was successful. Click **Quit**. The installer closes.




- Access the Campagne folder at the **Install Location** specified on the Install Campagne Software screen.

 *Omnis 7* is the database engine used for *GiftMaker Pro* and *EventMaker Pro*.

11. In the Campagne folder, open the Omnis 7.3.8.1 folder and GiftMaker Pro folder.



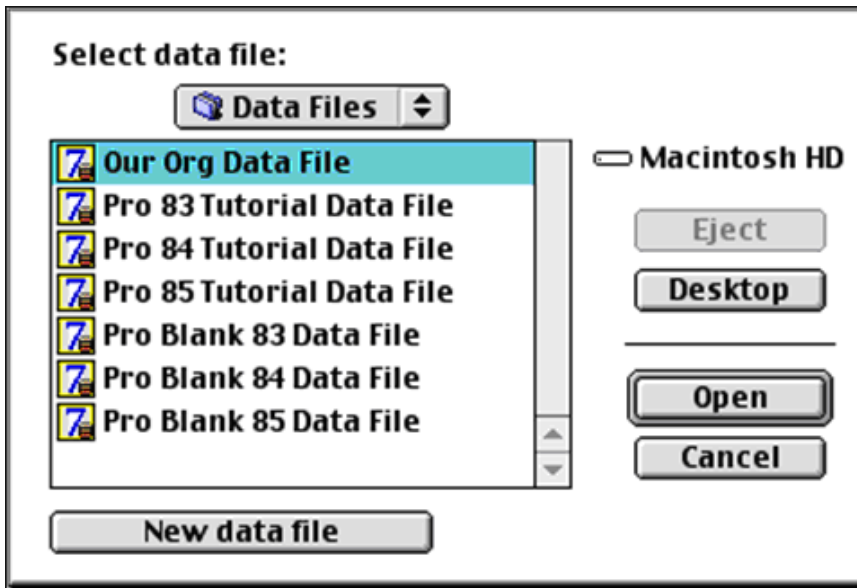
12. Click and drag the **GiftMaker Pro 85** icon in the “GiftMaker Pro” folder over the **OMNIS 7** icon in the “Omnis 7.3.8.1” folder.
13. If you are updating from version 7.9 or earlier or are installing *GiftMaker Pro* or *EventMaker Pro* on the workstation for the first time, you must serialize *Omnis 7*. The *Omnis 7* Welcome/Serialise screen appears.

 Do not cancel the installation before you serialize *Omnis 7*. If you cancel the installation before serializing *Omnis 7*, you will have a single-user version of *Omnis 7*. If your license is for multiple users, you will encounter problems when logging on when other users are in the program.

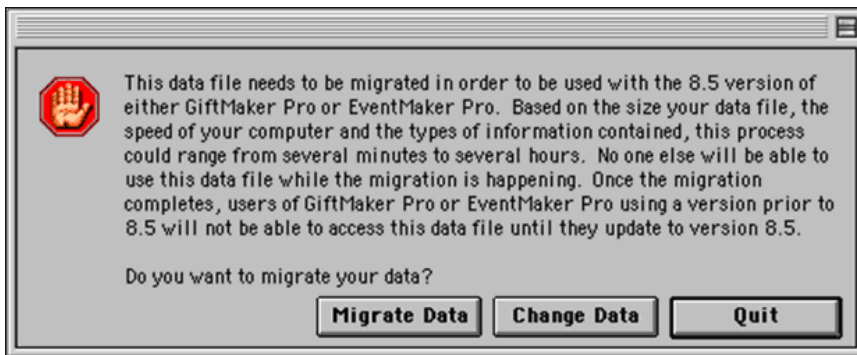


Enter your personal details and *Omnis 7* **Serial Number** and click **OK**. The Select data file screen appears.

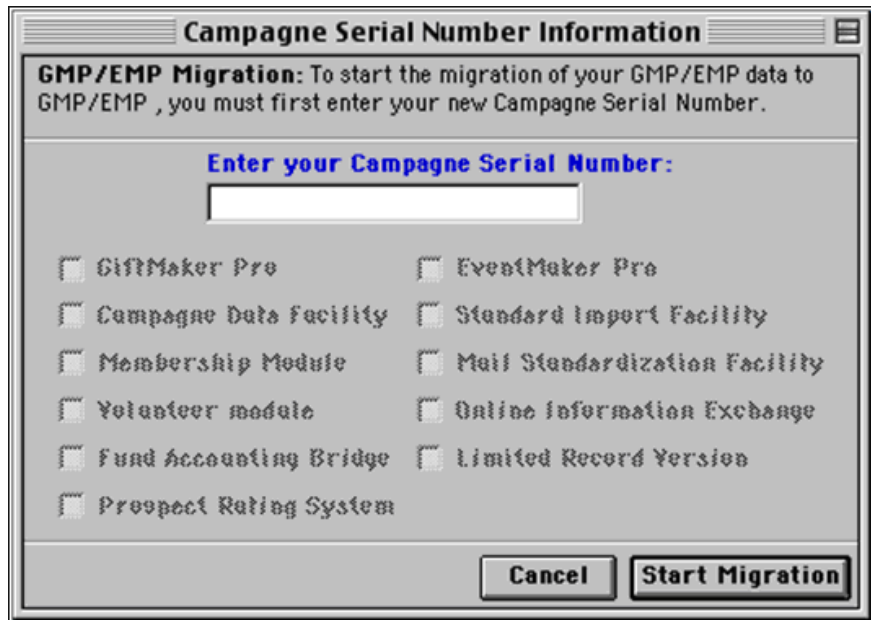
14. On the Select data file screen, locate and select your data file.



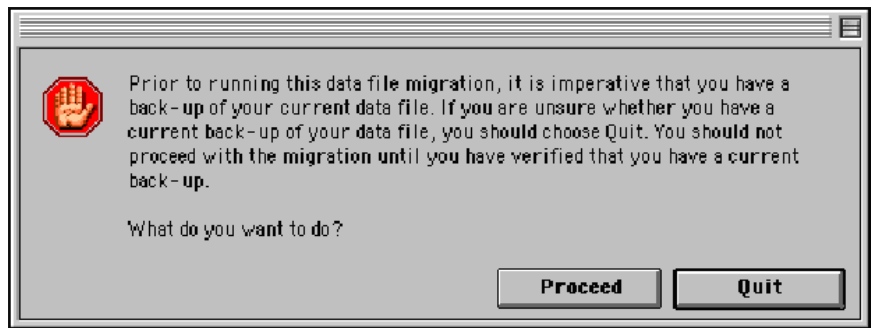
15. Click **Open**. A message appears to confirm your data file selection.



16. Click **Migrate Data**. The Campagne Serial Number Information screen appears.




17. In the **Enter your Campagne Serial Number** field, enter the Campagne serial number for your copy of *GiftMaker Pro* or *EventMaker Pro*.
18. Click **Start Migration**. A message appears to confirm you have a backup of your current data file.



19. Verify you have a backup of your current data file and click **Proceed**.

If you are unsure whether a current backup of your current data file exists, click **Quit** and back up the data file. For information about how to back up the data file, see the *GiftMaker Pro Reference Manual*.

 Version 8.5 accepts serial numbers from version 8.4 or 8.5. If you cannot locate your 8.4 serial numbers, contact Customer Support. To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).

 The migration processing time varies depending on the size of the data file, location of the data file, and other computer configurations. Most data file migrations should complete within an hour.

The data file begins to migrate to version 8.5. When the migration is complete, the Sign on screen appears.



20. Select a user name and click **Sign On**.

If a password is required, the Security password entry screen appears. In the **Please enter your password** field, enter your password.

21. To clean up your desktop, you can delete the downloaded setup file. Do not delete the new shortcut installed for *GiftMaker Pro 8.5*.


Installing or Updating on Multiple Workstations


If you have *GiftMaker Pro* or *EventMaker Pro* installed on multiple workstations, there are several considerations when updating the program. A typical network installation installs the program on each workstation and stores the data file within a shared location on the server.

Pre-Update or Installation Checklist

Before you update or install *GiftMaker Pro* or *EventMaker Pro* on multiple workstations, follow these checklist items.

- Plan to install the update on all workstations when all users are out of *GiftMaker Pro* and *EventMaker Pro*.

 After the data file migrates to version 8.5, it is no longer compatible with an older version of the software.

 During the installation on the first workstation, you migrate your database to version 8.5. Regardless of the number of workstations on which the new version is installed or the number of add-on modules your organization uses, this data migration is necessary only once. However, you must install the program files on each workstation to run *GiftMaker Pro* or *EventMaker Pro*.

- ❑ When you update to *GiftMaker Pro 8.5* from version 8.3 or earlier, locate your Campaigne and Omnis serial numbers for version 8.4. The version 8.4 serial numbers are also compatible with version 8.5. The serial numbers are required during the data file migration process. If you cannot locate your 8.4 serial numbers, contact Customer Support. To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at www.blackbaud.com (on the **Support** menu, select **Case Central**).
- ❑ Before the installation, print the Data File Status report from the **File** menu in *GiftMaker Pro* or *EventMaker Pro*. This report details the data file path and file name for your organization's current data file. You need this information during the data file migration and when you first launch the new version from each workstation.
- ❑ Before the installation, create a current, reliable backup of the database. There is no undo function for the migration utility. To return your database to its preupdate condition, you must restore to a backed up database. To ensure the correct file is included in the data backup, refer to the **Data File Path** printed on the Data File Status report for the location of your current, live database.


Installing the Update on Multiple Workstations

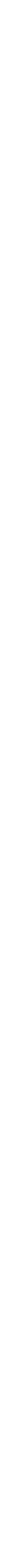
With all multiple-user installations, each user must use the same version to access the data file. Once a database updates to version 8.5, all users must use that version and cannot return to earlier versions without first restoring the backup database from before version 8.5 was used.

➤ Installing the update on multiple workstations

1. Install the new update release on one of the workstations in your organization. When you update to *GiftMaker Pro 8.5* from version 8.3 or earlier, you must have the current serial numbers assigned to your organization.
 - For information about installing the new version on a Windows operating system, see “Installing or Updating on a Windows Operating System” on page 2.
 - For information about installing the new version on a Macintosh operating system, see “Installing or Updating on a Macintosh Operating System” on page 15.
2. After you migrate the data file to version 8.5, repeat the installation procedure on each workstation to run *GiftMaker Pro* or *EventMaker Pro*.
3. From each workstation, do as follows:
 - a. Launch the application, connect to the data file, and sign on.
 - b. Verify all shortcuts and aliases point to only the latest, current version of the software and are functional.
 - c. Because earlier versions of the program cannot now access the database, remove any old shortcuts.

4. Verify only one copy of the database is available to be accessed by users. Keep all backup copies on separate media, properly labeled for storage. As a reference to the correct path of the live database, retain a printed copy of the Data File Status report.

 You may want to retain the backed up database from before the update. To return your database to its pre-update condition, you must restore a backed up database.



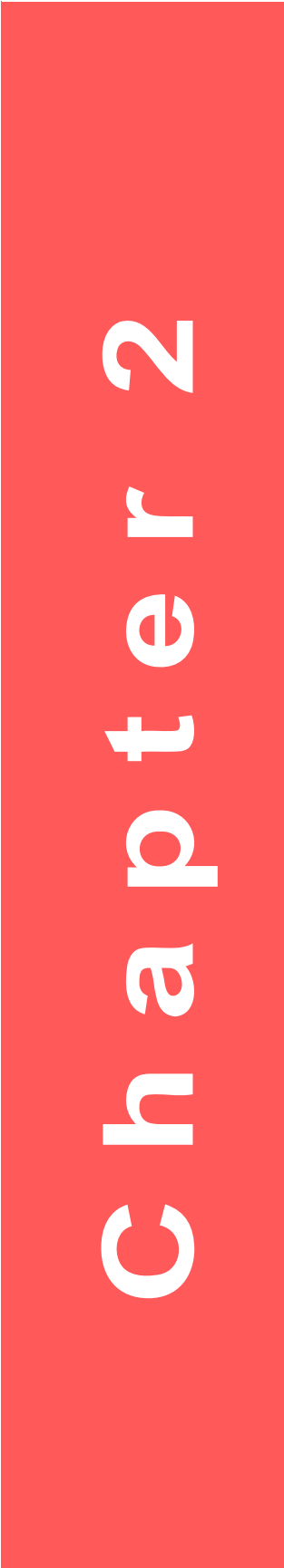
Product Improvements


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 If you are updating from *GiftMaker Pro 8.4* to *GiftMaker Pro 8.5*, no data migration is necessary. If you are updating from *GiftMaker Pro 8.3* or prior, you must complete a data file migration after the installation. The migration requires current serial numbers and additional time.

GiftMaker Pro and *EventMaker Pro 8.5* include a number of product improvements. We improved functionality on the gift entry record and the popular Instant Thank You Letter table feature. To improve the printing and exporting of reports, we enhanced several reports and analyses and improved the User Defined Retrieval functionality. To enable you to block some users from processing records entered by other users, we improved the **Security Options** of the Staff table screen. We have also included enhancements for when you transfer gifts from *WebCampaigns*. This chapter discusses the product improvements added to version 8.5 of *GiftMaker Pro* and *EventMaker Pro*.

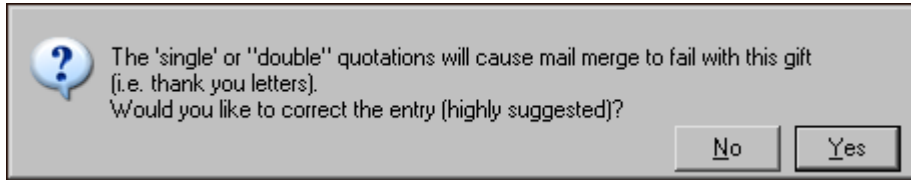
Gift Entry

In *GiftMaker Pro 8.5*, we improved several items to enhance gift entry functionality.

Gift Processing

Batch Gift Processing. For databases set to use Batch Gift Processing, the details in the **Thank You Letter** frame on the Gift Entry screen are correctly saved when you post and clear gifts from the Batch Gift Processing screen. In *GiftMaker Pro 8.5*, the status does not change from **Letter Sent** to no letter option selected, and the **Date Sent** field is not cleared as the gift is posted.

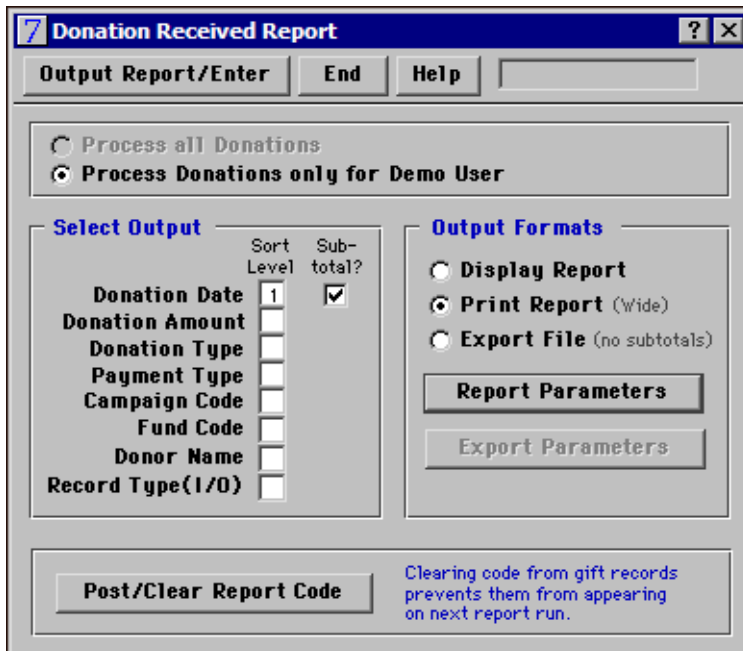
Gift Comment Field. Although we recommend you remove all single and double quotation marks from the gift **Comment** field, in *GiftMaker Pro 8.5*, you can override the warning message and save a gift entry without first removing quotation marks. If you leave single or double quotation marks in a **Comment** field, the fields may still misalign in export data and cause potential problems with mail merge documents or spreadsheet reports.



If you receive the warning message and can reword the **Comment** to avoid using quotation marks, click **Yes**. For example, reword 24" TV to 24-inch TV. If you cannot remove the quotation marks and are sure the gift record will not be used in an export file for mail merge letters, click **No** and save the gift record without removing quotation marks from the **Comment**.

Thank You Letter Document Field. When you update a donation, *GiftMaker Pro 8.5* enables you to use two methods to edit the **Document** field in the **Thank You Letter** frame on the gift record. You can enter the **Document** with exact spelling or select the **Document** from the lookup list. In *GiftMaker Pro 8.4* and earlier, when you manually enter a name in the **Document** field, the field entry is not saved.

Clear Gift Codes. If password security is enabled for your system, two gift processing options in the Security options screen of *GiftMaker Pro 8.5* enable you to block users from clearing codes on gifts entered by other users. For example, on the Donation Received Report screen, you can disable the **Process all Donations** option for some users to enable them to post and clear only gifts they enter.



You can disable the option to clear codes on gifts by other users in four areas: Donations Received, Pledges Received, Donation Thank Yous, and Pledge Thank Yous. For more information about the Staff table screen **Security Options** frame, see “Security Options” on page 41.

Memorial/Honor Gifts. In *GiftMaker Pro 8.5*, memorial/honor gifts do not cause “incorrect link” errors, as occasionally seen on the Memorial Report in previous versions. However, this improvement does not repair damaged pointers that already exist in a database before you install *GiftMaker Pro 8.5*. For more information about the Memorial Gift Reconnection utility, see “Pro Utilities” on page 42.

Instant Thank You Letters

In *GiftMaker Pro 8.5*, new merge fields are available on the Instant Thank You Letter templates. Also, a message now appears to remind you to use the Instant Thank You Letter option instead of the **Merge (Print Later)** option for an anonymous gift.

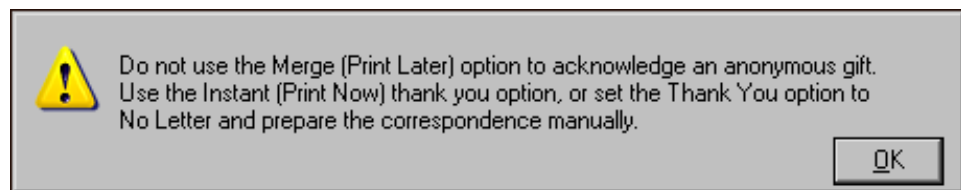
Merge Fields

In *GiftMaker Pro 8.5*, new merge fields are available on the Instant Thank You Letter templates. When you add or edit any letter from the Instant Thank You Letter Template table, you can select **Organization name** or **Publication name** from the **Select Merge Field** drop-down menu.

On an Instant Thank You Letter template for a Pledge Payment, four additional fields are available. When you add or edit a **Pledge Payment** letter from the Instant Thank You Letter Template table, you can now select **Pledge Amount**, **Amount outstanding**, **Scheduled pay amount**, or **Scheduled pay date** from the **Select Merge Field** drop-down menu.

Anonymous Gifts

When you select the **Merge (Print Later)** option for an anonymous gift, a message now appears to remind you to use the Instant Thank You Letter option instead.



Reports and Analyses

GiftMaker Pro 8.5 and *EventMaker Pro 8.5* improve the printing and exporting of several reports and analyses.

Profile Report. On the Profile Report in *GiftMaker Pro 8.5* and *EventMaker Pro 8.5*, the Change Date for a secondary address is no longer omitted, even if the address has no additional information or Phone 3 data to report.


Donor Contribution Statement. In *GiftMaker Pro 8.5*, when you print a Donor Contribution Statement for only one donor at a time, the search reports the correct donor count and the envelope or label prints successfully.

Prospect Rating Top Percentile Report. In *GiftMaker Pro 8.5*, you can select **Analysis, Top percentile report** from the menu bar. If you select **Top percentile report**, you can build a list based on the Prospect Rating System (PRS) ranking and output the data to an export file. If, on the Export File Parameters screen, you select **Use List Definition as Export Format**, the correct data is exported in proper alignment with its column headings.

Memorial/Honor Report. If, when you export a Memorial/Honor report in *GiftMaker Pro 8.5*, you select an **Export Type** of **Donor Based** and, on the Export File Parameters screen, select to include gift history information, the data exports in proper alignment with its column headings.


Volunteer Work History Report. If you have the optional *Volunteer* module in *GiftMaker Pro 8.5*, when you select **Retrieval, Volunteer, Work history** from the menu bar, you can build a list of volunteer histories and output the data to an export file. If, on the Export File Parameters screen, you select **Use List Definition as Export Format**, the data exports in proper alignment with its column headings.

The export format changes in *GiftMaker Pro 8.5* may affect the export file you use with a mail merge document, spreadsheet application, or custom report generator. If you use a report export file in one of these formats with an external application, you may need to adjust the external application the first time it links to the file exported from *GiftMaker Pro 8.5*.

 If you are updating a database to version 8.5 from version 8.3 or earlier and use export files with an external application, you may need to make additional adjustments to the settings of the external application. For more information about the export file format adjustments, see the *GiftMaker Pro and EventMaker Pro 8.4 Update Description*.

User Defined Retrievals

Print/Display All Classifications Option

 The **Print/Display All Classifications** report parameter option is a new feature and is only available in a *GiftMaker Pro 8.5* User Defined Retrieval.

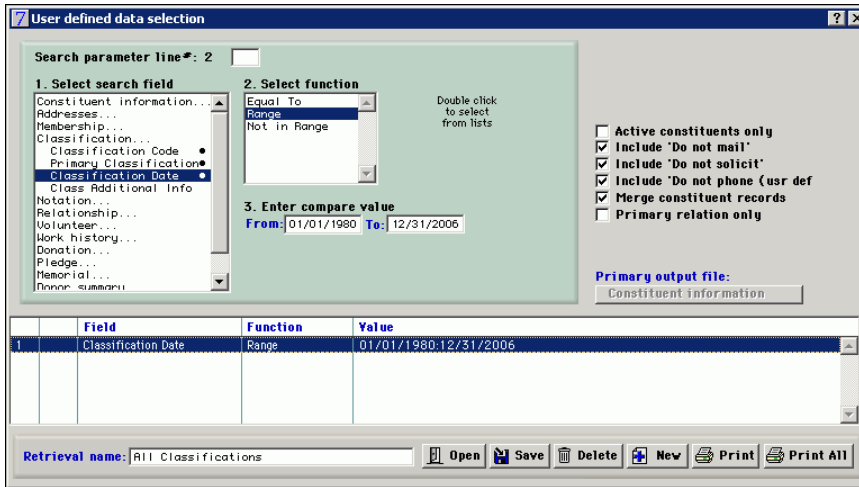
To ease the reporting of all classification codes assigned to each constituent record found by a user defined retrieval, a new option is available in *GiftMaker Pro 8.5*. When you create a constituent report, you can now select to print or display all classifications. The new **Print/Display All Classifications** report parameter option reports each constituent name once, followed by a listing of all classification codes assigned to that constituent record, including the classification date and other details.

08/16/2006, 2:22PM		Retrieval Report				Page: 1
Requested by: NU		Pro Series Demo				
Name & Address	Pri.	Class	Main Phone	Solicitor	I/O	
Mr. Luke Taylor		ALUM	518/256-4412	JA		I
Classifications		Date	Primary?	Additional Information		
ALUM Alumni/Alumnae		08/10/2005	YES	B.S. degree		
MEDIA Press and Media Contacts		08/10/2005	NO			
Mr. Bruce Urban		FRIEND	570/456-1123			I
Classifications		Date	Primary?	Additional Information		
FRIEND Friend		08/10/2005	YES			
Mr. Wilbur White		BDC	800/582-3489	DH		O
Big Guys Unlimited						
Classifications		Date	Primary?	Additional Information		
BDC Board of Directors - Current		05/05/1991	YES	Chairman		
NEWS Newsletter List		03/07/1990	NO			
VOL Volunteer		04/01/1991	NO			
ALUM Alumni/Alumnae		06/12/1981	NO	BSEE degree		
CORP Corporation		06/02/2004	NO			


➤ **Reporting all classification codes assigned to each constituent record**

In *GiftMaker Pro 8.5*, you use the new **Print/Display All Classifications** report parameter option to report all classification codes assigned to each constituent record.

1. On the User defined data selection screen, set up the **Search parameter lines** to select the constituents on which to report. To avoid duplicates, mark **Merge constituent records**.



2. Set the **Primary output file** to Constituent Information, Donor Summary, or Donor/Campaign Summary.
3. On the action bar, click **Output Options/2**. The User Defined retrieval/output options screen appears.

 To use the new **Print/Display All Classifications** report parameter, the retrieval must use a **Primary output file** of Constituent Information, Donor Summary, or Donor/Campaign Summary.



4. In the **Sort method** frame, add fields or **Change sort levels** as necessary.

5. In the **Output formats** frame, mark **Print report** or **Display report** and click **Report parameters/R**. The Report Parameters screen appears.

Report Parameters

OK/Enter Help/H Page Setup

Print/Display Report Using List Format?

Use Master Report Format
 Use Detail Gift Report Format

Print/Display Class Year with Name?

Print/Display Address information?

Print/Display Contact information?

Print/Display User-Defined information?

Print/Display Membership information?

Print/Display Gift Summary information?

Print/Display PRS information?

Print/Display Space between records?

Print/Display Retrieval Parameters First?

Print/Display All Classifications?

Report Title:
Retrieval Report

6. Mark the **Print/Display Space between records** checkbox and the new **Print/Display All Classifications** checkbox.
7. Click **OK/Enter**. You return to the User Defined retrieval/output options screen.
8. On the action bar, click **Process Output/P** to generate the report.

Print All Retrieval Parameters


In *GiftMaker Pro* and *EventMaker Pro 8.5*, a new report is available to view the details of all saved user defined retrievals. For each saved retrieval, the report includes the retrieval name, search criteria, selected primary output file, and selected filters such as Active Constituents Only or Include 'Do Not Mail'.

Line#	Field	Function	Comparison Value
08/16/2006, 2:40PM Page: 1 Requested by: NU User Defined Retrieval Parameters All Retrievals			
<hr/>			
2006 meeting notes			Primary Output File: NOTES NO Active Constituents Only YES Incl'Do Not Mail' NO Merge Constituent Records YES Incl'Do Not Solicit' NO Primary Relation Only YES Incl'Do Not Contact'
1	Notation Keyword	Equal To	Meeting
2	AND Notation Action Date	Range	01/01/2006:12/31/2006
<hr/>			
All const's (except inactive/deceased)			Primary Output File: Constituent YES Active Constituents Only YES Incl'Do Not Mail' NO Merge Constituent Records YES Incl'Do Not Solicit' NO Primary Relation Only YES Incl'Do Not Contact'
1	All constituents	Range	1:9999999
<hr/>			
All donors (including unpaid pledges)			Primary Output File: Donor Summary NO Active Constituents Only YES Incl'Do Not Mail' NO Merge Constituent Records YES Incl'Do Not Solicit' NO Primary Relation Only YES Incl'Do Not Contact'
1	Donation, Total Amount	Greater/Equal to	0.01
2	OR Pledge, Total Amount	Greater/Equal to	0.01
<hr/>			
Dinner invitations			Primary Output File: Constituent YES Active Constituents Only NO Incl'Do Not Mail' YES Merge Constituent Records YES Incl'Do Not Solicit' YES Primary Relation Only NO Incl'Do Not Contact'
1	Classification Code	Equal To	BDC/DEV/VOL
2	OR Gift Summary Campaign	Equal To	CAPITL
3	AND Donation, Total Amount	Greater/Equal to	5000.00
<hr/>			
4 Retrievals			

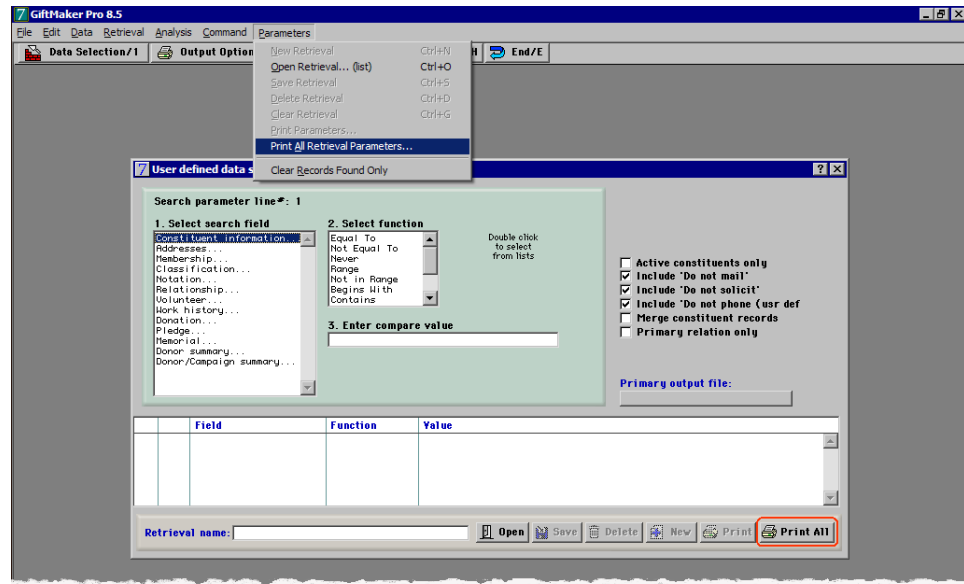
For users preparing to convert their data to *The Raiser's Edge*, this report is especially helpful. Before you begin to recreate your retrievals as queries in *The Raiser's Edge*, you can print all saved retrievals from *GiftMaker Pro* and *EventMaker Pro* to use as reference for searches you plan to continue using after the conversion.

On the User defined data selection screen in *GiftMaker Pro 8.5* or *EventMaker Pro 8.5*, you can generate the report of all saved retrieval parameters by two different ways:

- Click the new **Print All** button at the bottom right corner.


 When you click **Print All**, the report includes all saved retrievals. When you click **Print**, the report includes the current retrieval only. If no saved retrievals exist when you click **Print All**, no report output occurs.

- From the menu bar, select **Parameters, Print All Retrieval Parameters.**



In *EventMaker Pro 8.5*, when you click **Print All**, the report includes all saved retrievals from each event as well as those based on all-event search criteria.

Display List Output Format

 If you update to *GiftMaker Pro 8.5* from *GiftMaker Pro 8.3* or earlier, be aware that *GiftMaker Pro 8.4* provided additional improvements to the **Display List** output format. Also, no saved **Display List** definitions from version 8.3 or earlier migrate to version 8.5. For more information about the **Display List** output format improvements in *GiftMaker Pro 8.4*, see the *GiftMaker Pro and EventMaker Pro 8.4 Update Description*.

In *GiftMaker Pro 8.5*, the **Display list** output format is improved in user defined retrievals.

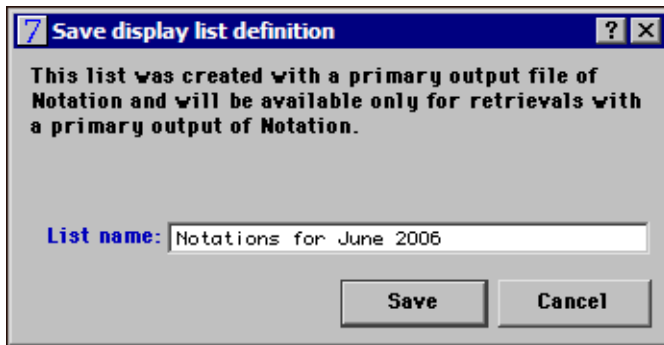
- In *GiftMaker Pro 8.4*, when you use **Donation** search fields for a retrieval and include a second search line that begins with “or” instead of “and”, it is difficult to output the retrieval to a **Display list** format with **Donation** search fields in the **List definition**. On the **Display list** definition screen in *GiftMaker Pro 8.5*, the **Fields available for list** is corrected for retrievals that involve **Donation** or **Donor/Campaign summary** search fields.
- In *GiftMaker Pro 8.4*, the **Notation Solicitor** and **Work History Activity Code** search fields sometimes output no data to a **Display list** output format. In *GiftMaker Pro 8.5*, this is corrected.
- In *GiftMaker Pro 8.4*, a retrieval that uses **Volunteer** search fields and starts with “Classification Code never” or “Notation Keyword never” outputs blank fields to the **Display list** output format. In *GiftMaker Pro 8.5*, this is corrected.

In *GiftMaker Pro 8.5* and *EventMaker Pro 8.5*, a default setting in the **Display list** output format has changed. When you output a retrieval in the **Display list** format and output the display list to the **Display Report** or **Print Report** format, the **Print/Display Report Using List Format** option is selected by default. To override this default, access the Report Parameters screen and unmark the **Print/Display Report Using List Format** checkbox.

In *EventMaker Pro 8.5*, a retrieval with **Attendee** search fields set to a **Display list** output format enables the option to output the list to the standard **Display report** or **Print report** format. You are not limited to the **Print using list format** report parameter.

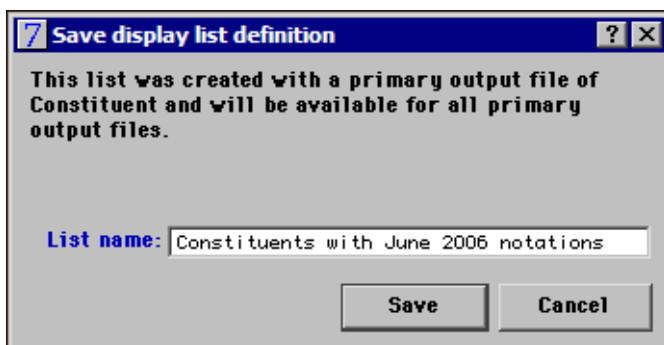
Primary Output File

In *GiftMaker Pro* and *EventMaker Pro 8.5*, the connection between the list definition of the **Display list** output format and the selected **Primary output file** is clarified to make it easier to find and reuse saved list definitions in the **Display list** output format. When you save a **Display list** output, a message appears to remind you of the current **Primary output file** and how it will affect future access to the list definition.



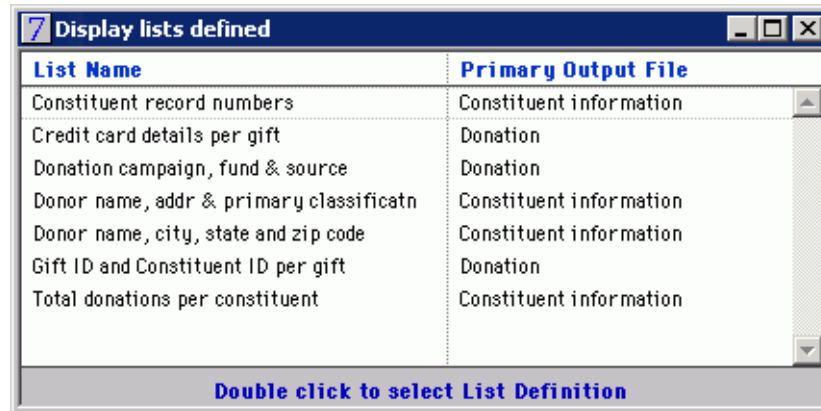
For example, you use a user defined retrieval with **Notations** search fields to find records where the **Notation Action Date** is in the Range **From 06/01/2006 to 06/30/2006**. When you set the **Primary output file** to **Notation**, you can output the retrieval to a **Display list** format that includes fields such as **Notation Action Date**, **Notation Completed Date**, and **Keyword**. If you save the list definition for reuse at a later time, a message appears to remind you that you can only use the list definition with other retrievals with a **Primary output file** of **Notation**. Later, if you view all saved list definitions and the **Primary output file** is not set to **Notation**, this list definition does not appear.

If you change the **Primary output file** of the same retrieval to **Constituent information**, the retrieval can again output to a **Display list** format, but its list definition is limited to fields associated with general constituent information, such as **Name** and **Address**, with no **Notation** details. If you save this list definition for reuse at a later time, a message appears to inform you that you can use the list definition with any user defined retrieval, regardless of the set **Primary output file**.



Display Lists Defined Screen

In *GiftMaker Pro* and *EventMaker Pro 8.5*, when you open the display list definition of a saved **Display list** output format, the Display lists defined screen includes the **Primary Output File** column. This column clarifies the relationship between each list definition and the primary output file in use when it was saved. Only the list definitions applicable to the current **Primary output file** appear.



List Name	Primary Output File
Constituent record numbers	Constituent information
Credit card details per gift	Donation
Donation campaign, fund & source	Donation
Donor name, addr & primary classificatn	Constituent information
Donor name, city, state and zip code	Constituent information
Gift ID and Constituent ID per gift	Donation
Total donations per constituent	Constituent information

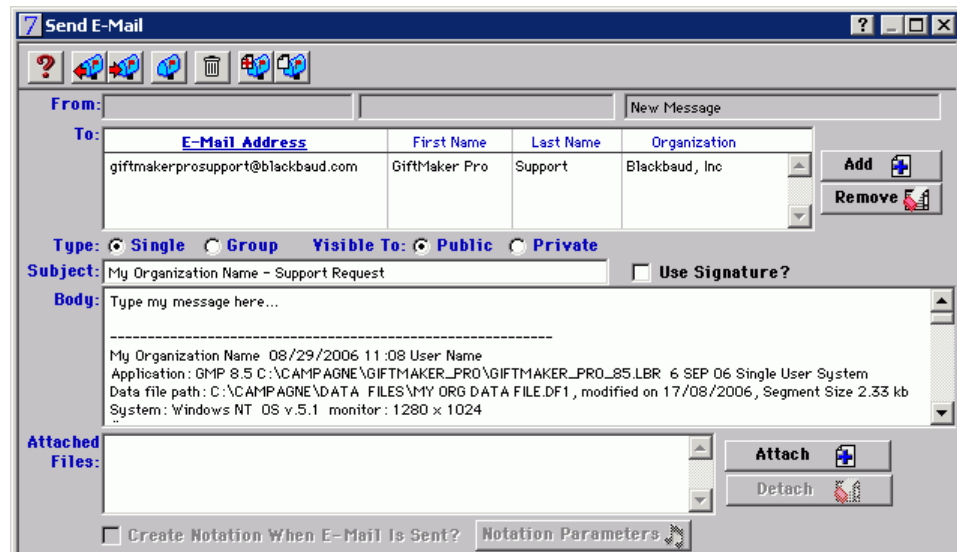
Double click to select List Definition

You can reuse list definitions based on a **Primary Output File** of Constituent information with retrievals from any **Primary Output File**. For example, if the **Primary Output File** is set to Donation, the list of saved **Display list** definitions available for the retrieval can include both Donation and Constituent information **Primary Output File** types.

Send Email to Support

 To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at <http://www.blackbaud.com> (on the Support menu, select Case Central).

On the Send E-Mail screen, the recipient in the **To** field is updated with the current *GiftMaker Pro* Customer Support email address at giftmakerprosupport@blackbaud.com. To access the Send E-Mail screen, click **Send email to support** on the dashboard in *GiftMaker Pro 8.5* or *EventMaker Pro 8.5*.



Send E-Mail

From: [New Message]

To:

E-Mail Address	First Name	Last Name	Organization
giftmakerprosupport@blackbaud.com	GiftMaker Pro	Support	Blackbaud, Inc

Type: Single Group **Visible To:** Public Private Use Signature?

Subject: My Organization Name - Support Request

Body: Type my message here...

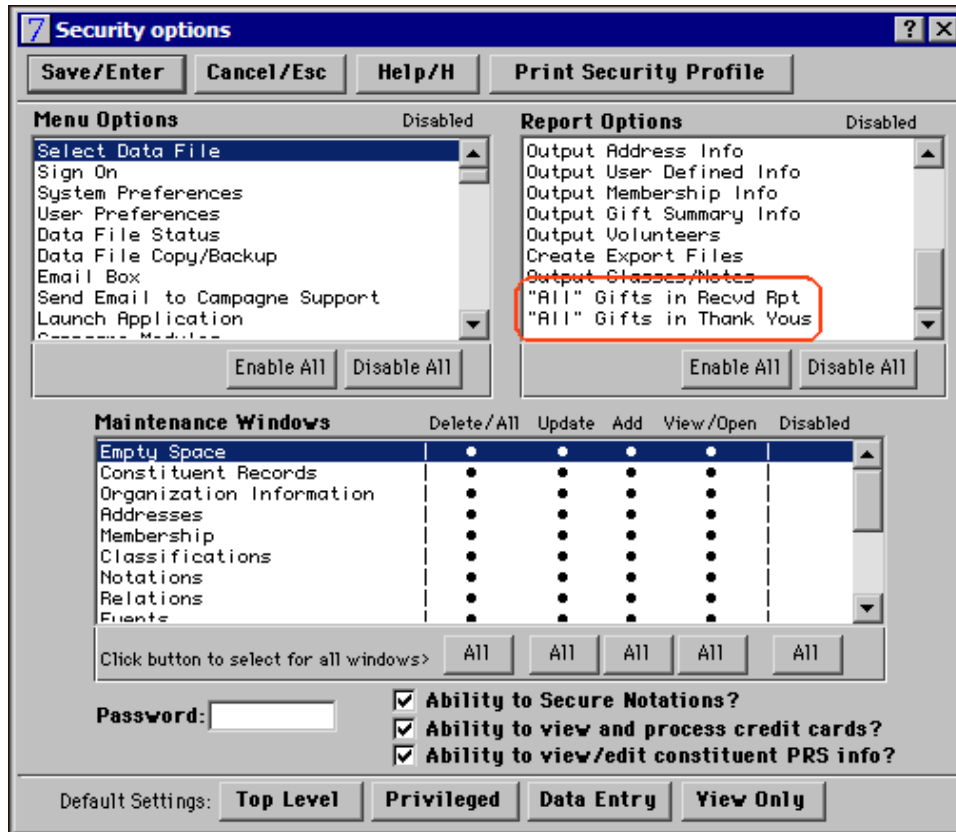
My Organization Name 08/29/2006 11:08 User Name
 Application: GMP 8.5 C:\CAMPAGNE\GIFTMAKER_PRO\GIFTMAKER_PRO_85.LBR 6 SEP 06 Single User System
 Data file path: C:\CAMPAGNE\DATA FILES\MY ORG DATA FILE.DF1, modified on 17/08/2006, Segment Size 2.33 kb
 System: Windows NT OS v.5.1 monitor: 1280 x 1024

Attached Files:

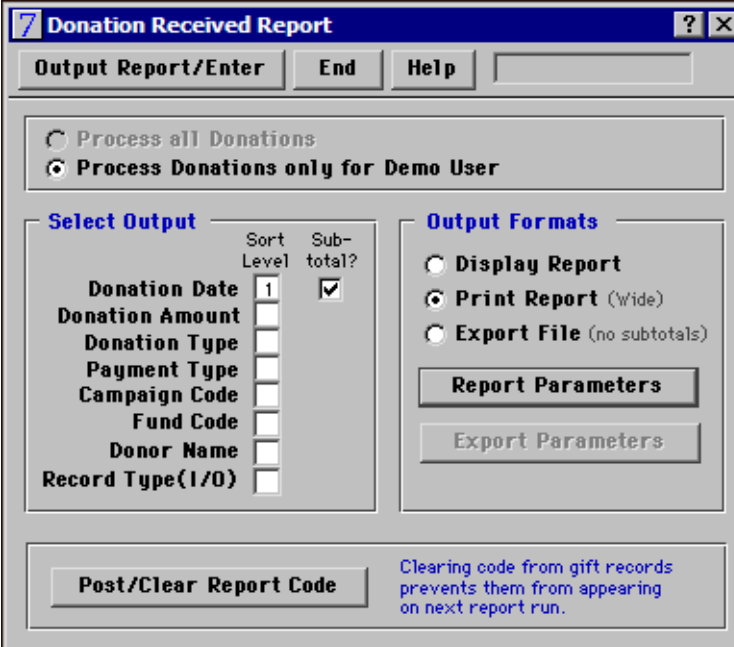
Create Notation When E-Mail Is Sent? **Notation Parameters**

Security Options

In the **Security Options** of the Staff table screen in *GiftMaker Pro 8.5*, the “All” Gifts in Recvd Rpt and “All” Gifts in Thanks You **Report Options** are improved. If password security is enabled for your system, you can use these option to block users from processing donations entered by other users in databases set to use password security.



For example, when the **All Gifts in Recvd Rpt** security option is disabled, the **Process all Donations** option is disabled on the Donation Received Report screen. The user can post or clear only his or her own gifts, not those entered by other users.



You can disable the option to clear codes on gifts entered by other users in four areas of *GiftMaker Pro*: Donations Received, Pledges Received, Donation Thank Yous, and Pledge Thank Yous.

Pro Utilities

 To contact Customer Support, call 1-800-468-8996 and follow the options for *GiftMaker Pro* support. You can also email Customer Support at giftmakerprosupport@blackbaud.com or visit the online case management tool, Case Central, at <http://www.blackbaud.com> (on the Support menu, select Case Central).


GiftMaker Pro 8.5 provides two new utilities in the *Pro Utilities* module, for use under the guidance of *GiftMaker Pro* Customer Support.

Swap Gift Codes. To swap two gift codes on every donation and pledge in your database, use the Swap Gift Codes utility. You can apply this utility to any two of the Campaign, Fund, or Gift Source gift code fields. For example, if you review all the campaign and fund codes for your database and determine they are set up incorrectly and should be reversed, contact *GiftMaker Pro* Customer Support to discuss how, with the Swap Gift Codes utility, you can easily swap the codes in those two fields on every gift record. When you use the Swap Gift Codes utility, it swaps the selected codes in the Table Maintenance area of *GiftMaker Pro* and recalculates the donor summaries and campaign and fund totals. If you use *EventMaker Pro*, the Swap Gift Codes utility swaps the gift codes in the ticket level setup for each event. To use the Swap Gift Codes utility, all other users must exit *GiftMaker Pro* and *EventMaker Pro*.

When you use the Swap Gift Codes utility to swap Gift Source Codes with another code field, it leaves a MATCHG system code in the Gift Source Table to ensure proper operation of matching gift data entry. Before you use the Swap Gift Codes utility, prepare a current, reliable backup of your data file.

Memorial Gift Reconnection. If you notice an incorrect link error on a memorial report or receive an error message informing you of a memorial link error, contact *GiftMaker Pro* Customer Support to discuss using the Memorial Gift Reconnection utility to repair the damaged pointer.

07/01/06, 10:55 AM		Memorial/Honor Report			
Donor Name	Amount	Date	Campaign	Fund	
Gifts to Memorial/Honor Name					
<input type="checkbox"/> Error	<input type="checkbox"/> Incorrect Link Memorial	0.00		/00	
Type: M-Memory					
1 Gifts to Memorial/Honor Name					



An error has occurred when finding Memorial/Honor records. One or more of the records found may have a damaged pointer. Please call Campagne Associates for more information.

The Memorial Gift Reconnection utility may be unable to reconnect some notification details. Before you use the utility, prepare and mail all memorial/honor notifications.

WebCampaigns

When you transfer gifts from *WebCampaigns* to *GiftMaker Pro 8.5*, the Create Records process follows the constituent's selected email preference. In *GiftMaker Pro 8.3* and *8.4*, the **Do not add email address constituent** checkbox applies to all constituents in the import queue. In *GiftMaker Pro 8.5*, this checkbox applies only to constituents who specify an email preference of **No** in *WebCampaigns*.

No Email preferences for all constituents

On an imported record, if the constituent (new or linked) has specified an email preference of 'No', make the following changes to their GMP Constituent record. Note that a class code assigned here would not be considered primary.

Do not add email address to constituent

Check "Do not..."

Mail **Solicit** **Email (UserDef'd)**

Add the class code...

Overwrite GMP email with imported addresses?

For constituents with existing email addresses in GMP, overwrite the GMP data with the imported email addresses. Move the former GMP email addresses to notations, with the keyword 'Old email Adrs'.



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Review the Customer Support Guide for information about our online resources and support procedures.

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about Blackbaud

Blackbaud is the leading global provider of software and related services designed specifically for nonprofit organizations. More than 15,000 organizations use Blackbaud products and consulting services for fundraising, financial management, business intelligence, Web site management, school administration, and ticketing. Blackbaud's solutions include **The Raiser's Edge®**, **The Financial Edge™**, **The Education Edge™**, **The Patron Edge®**, **Blackbaud® NetCommunity™**, **The Information Edge™**, **The Researcher's Edge™**, **ProspectPoint™**, **WealthPoint™**, and **WealthPoint Online™** as well as a wide range of consulting and educational services. Founded in 1981, Blackbaud is headquartered in Charleston, South Carolina, and has operations in Toronto, Ontario; London, England; Glasgow, Scotland; and Sydney, Australia.

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