

The Raiser's Edge™

The Raiser's Edge and Blackbaud NetCommunity
Integration Guide

012412

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RE7-BBNCIntegration-2012

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What Is In This Guide?



In the *Blackbaud NetCommunity Integration Guide*, you learn to view and manage information about your constituents' activity on your organization's website when you integrate *The Raiser's Edge* and *Blackbaud NetCommunity*. You can also learn about the following.

- "NetCommunity Security" on page 2
- "NetCommunity Information" on page 4
- "Online vs. Offline Giving Report" on page 18

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

User Guides. To access PDF versions of the guides, select **Help, User Guides** from the shell menu bar or click **Help** on the Raiser's Edge bar in the program. You can also access the guides on our website at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

To narrow your search in the help file, enclose your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

NetCommunity Integration



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Blackbaud NetCommunity is a complete website management solution that allows your organization to create an interactive online network for your constituents. When you integrate **Blackbaud NetCommunity** with **The Raiser's Edge**, information about your website users and gifts downloaded from **Blackbaud NetCommunity** appear on your records in **The Raiser's Edge**. On your constituent records, you can view information about the constituent's activity on your **Blackbaud NetCommunity** website. You can also view information about the constituent's user profile, email sent to the constituent, and the constituent's team fundraising activity. On your gift records, you can view whether your organization received the gift online. In *Query* and *Export*, you can include fields to allow users to query and export data from **Blackbaud NetCommunity**. You can also generate a report to compare your constituents' online and offline giving.

NetCommunity Security

Your user rights are assigned in *Security*. To access *Security*, click **Admin** on the Raiser's Edge bar. The security settings affect only your ability to access the integration functions. You also need the applicable rights in **The Raiser's Edge** for the functions you perform with information downloaded from **Blackbaud NetCommunity**. For example, to view information about your **Blackbaud NetCommunity** site users on constituent records in **The Raiser's Edge**, you must have security privileges in *Records*.

Note: For more information about security and security groups, see the *Configuration and Security Guide*.

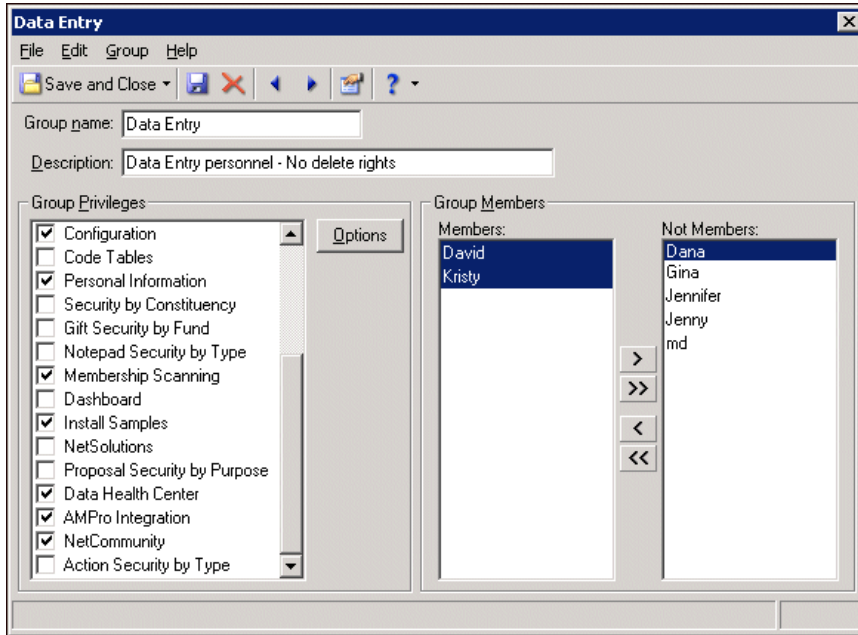
Security access for the **Blackbaud NetCommunity** integration functions can be assigned to specific areas, so you may have access to some areas but not others. For example, a security group may have access to the **NetCommunity** button on the Raiser's Edge bar but not to view user information from **Blackbaud NetCommunity** on constituent records.

If, on the group screen, the **NetCommunity** checkbox is marked in the **Group Privileges** box, the members of the group have access to information downloaded from **Blackbaud NetCommunity**.

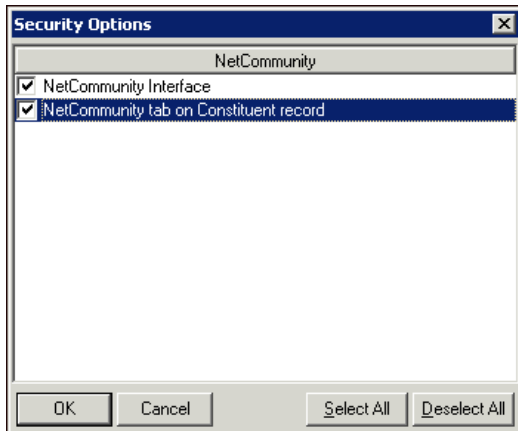
► Assign security privileges for Blackbaud NetCommunity integration

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Security**. The Security page appears.
3. Under groups in the **Security** tree view list on the left, select the security group to assign access to the **Blackbaud NetCommunity** integration functions. For example, to assign the data entry personnel access to the integration functions, select the Data Entry group.

4. On the action bar, click **Open**. The selected group screen appears.



5. In the **Group Privileges** box, mark **NetCommunity**. When you mark this checkbox, the **Options** button is enabled.
6. Click **Options**. The Security Options screen appears.



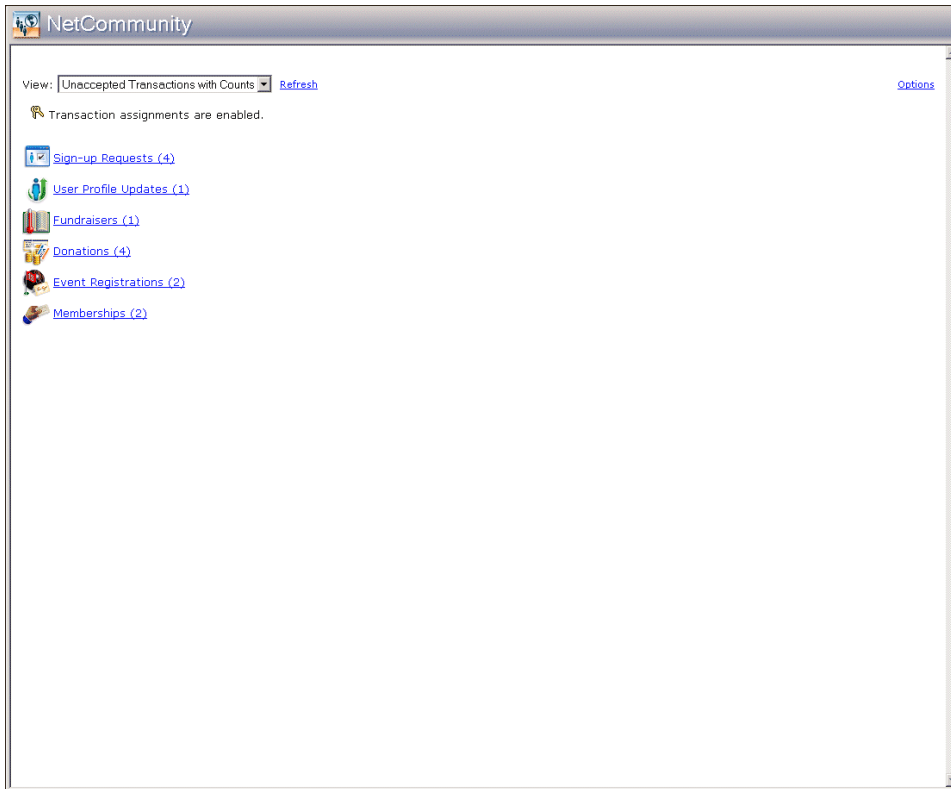
7. For each area of integration you want the members of the security group to have access, mark the corresponding checkbox.
- To allow members of the security group to use the **NetCommunity** button on the Raiser's Edge bar to access the NetCommunity page, mark **NetCommunity Interface**
 - To allow members of the security group to access information about **Blackbaud NetCommunity** website users on the constituent records in **The Raiser's Edge**, mark **NetCommunity tab on Constituent record**.

To mark both checkboxes, click **Select All**. To unmark both checkboxes, click **Deselect All**.

8. Click **OK**. You return to the selected group screen.
9. Click **Save and Close**. You return to the Security page of *Administration*.

NetCommunity Page

The NetCommunity page in *The Raiser's Edge* contains multiple sections for various download types. To access the NetCommunity page in *The Raiser's Edge*, click **NetCommunity** on the Raiser's Edge bar. If the **Blackbaud 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.



The top of the page contains a **View** field. 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, you can view how many new transactions exist. You should periodically check the NetCommunity page for transactions from the website. To make sure you have the latest information from the website, click **Refresh**.

Before you download transactions from **Blackbaud NetCommunity** to *The Raiser's Edge*, you should establish download options for Blackbaud NetCommunity web service, currencies, class note processing, new constituents, matching gift, transaction assignments, and advocacy information. For information about downloading transactions from **Blackbaud NetCommunity** and the required fields in *The Raiser's Edge*, see **The Raiser's Edge Integration** section of the **Blackbaud NetCommunity** help file.

NetCommunity Information

When you integrate *The Raiser's Edge* with **Blackbaud NetCommunity**, you can track and view online interactions with your constituents in *The Raiser's Edge*. You can also view whether a gift, an event registration, a membership transaction, or a volunteer job request in your database was originally downloaded from **Blackbaud NetCommunity**.

When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, the NetCommunity tab appears on your constituent records in *The Raiser's Edge*. With the functions available on the NetCommunity tab, you can view the constituent's user profile information from *Blackbaud NetCommunity* and track the online activity of the constituent on your *Blackbaud NetCommunity* website. You can also view information about email sent to the constituent, such as messages, acknowledgements, and newsletters. If you use Fundraiser part types in *Blackbaud NetCommunity*, you can track the constituent's Team Fundraising activity and progress. For more information about the functions available on the NetCommunity tab, see "NetCommunity Tab Categories" on page 8.

You can also use the information from *Blackbaud NetCommunity* to generate an Online vs. Offline Giving Report in *The Raiser's Edge*. This report provides a detailed or summary comparison of the donations your organization receives from the constituent through your *Blackbaud NetCommunity* site and the gifts the constituent provides through other means. For more information about this report, see "Online vs. Offline Giving Report" on page 18.

NetCommunity Tab

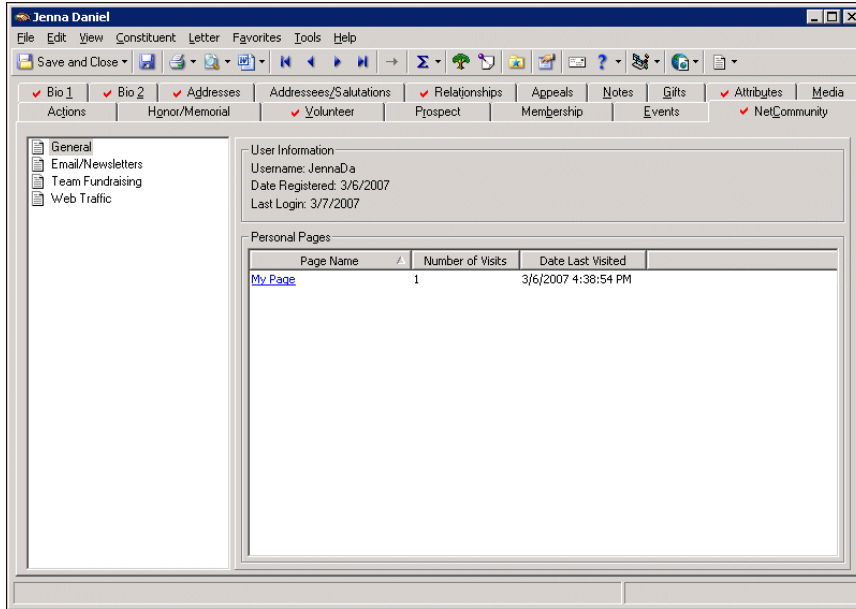
You access the NetCommunity tab from the constituent record. You can open the constituent record from the Constituents page of *Records*. When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, the NetCommunity tab is one of the many tabs available on the record.

With the functions available on the NetCommunity tab, you can view the constituent's user profile information from *Blackbaud NetCommunity* and track the online activity of the constituent on your *Blackbaud NetCommunity* site. You can also view email the constituent receives from *Blackbaud NetCommunity*, including newsletters to which the constituent subscribes. If you use Fundraiser part types in *Blackbaud NetCommunity*, you can track the constituent's Team Fundraising activity and progress. For more information about the functions available on the NetCommunity tab, see "NetCommunity Tab Categories" on page 8.

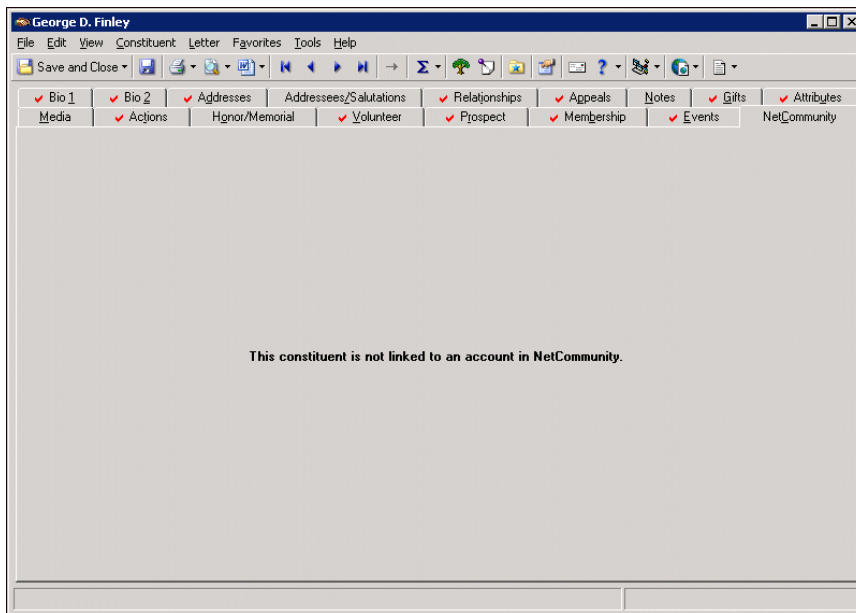
▶ Access the NetCommunity tab of a constituent record

1. On the Raiser's Edge bar, click **Records**. The Constituents page appears.
2. Open the constituent record in which you want to view NetCommunity information.
3. Select the NetCommunity tab.

- If the constituent record is linked to a registered user on your **Blackbaud NetCommunity** website, you can arrange the information on this tab based on four categories: **General**, **Email/Newsletters**, **Team Fundraising**, and **Web Traffic**. For information about these categories, see “NetCommunity Tab Categories” on page 8.



- If the constituent is not a registered user on your **Blackbaud NetCommunity** website but has been sent email from **Blackbaud NetCommunity** as part of a query of constituents, only the **Email/Newsletters** category is enabled on the NetCommunity tab.
- If the constituent is not a registered user on your **Blackbaud NetCommunity** website and has not been sent email from **Blackbaud NetCommunity**, or if the constituent record is not linked to a user record in **Blackbaud NetCommunity**, the message “This constituent is not linked to an account in NetCommunity” appears on the tab.



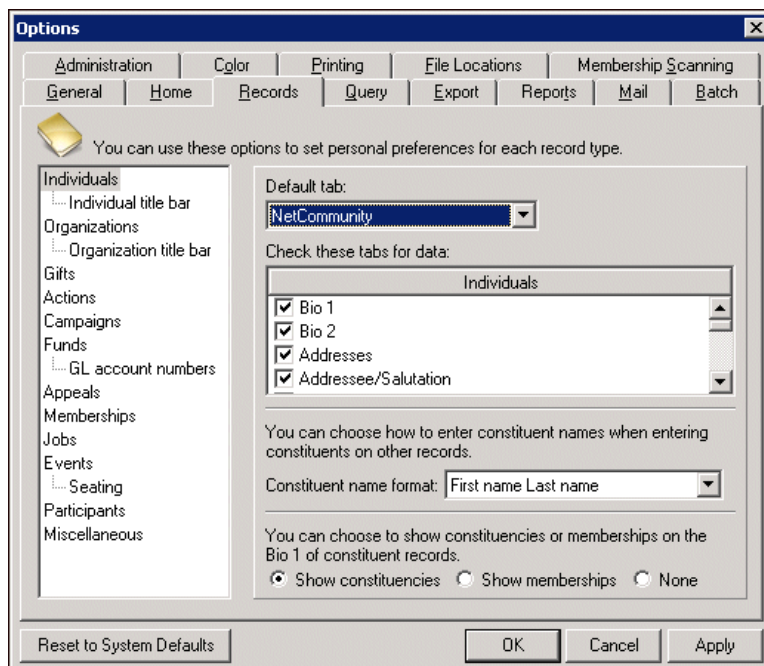
User Options for the NetCommunity Tab

Note: For more information about user options, see the User Options chapter of the *Program Basics Guide*.

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on your workstation. User options are login-specific, which means if you use your password to log into any workstation, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. For example, if you work most often on the NetCommunity tab, you may want constituent records to open on this tab instead of the default Bio 1 tab. You can use User Options to do this.

► Set individual constituent records to open on the NetCommunity tab

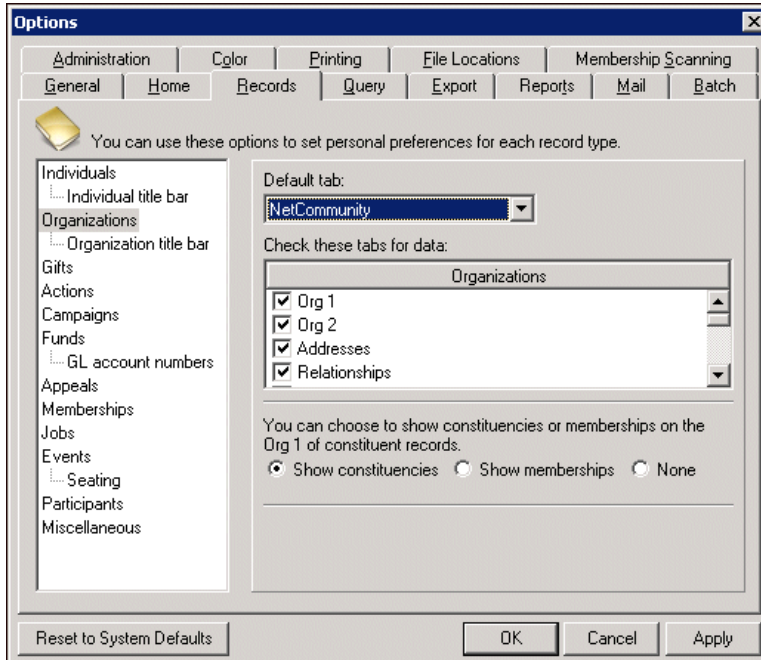
1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Records tab.
3. From the treeview on the left, select **Individuals**. On the right, the Individual Constituent user option selections appear.
4. In the **Default tab** field, select "NetCommunity".
5. To apply your changes, click **Apply**.
6. To save your changes and close the Options screen, click **OK**. You return to the shell of *The Raiser's Edge*.

► **Set organization constituent records to open on the NetCommunity tab**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Records tab.
3. From the treeview on the left, select **Organizations**. On the right, the Organization Constituent user option selections appear.
4. In the **Default tab** field, select “NetCommunity”.
5. To apply your changes, click **Apply**.
6. To save your changes and close the Options screen, click **OK**. You return to the shell of *The Raiser's Edge*.

NetCommunity Tab Categories

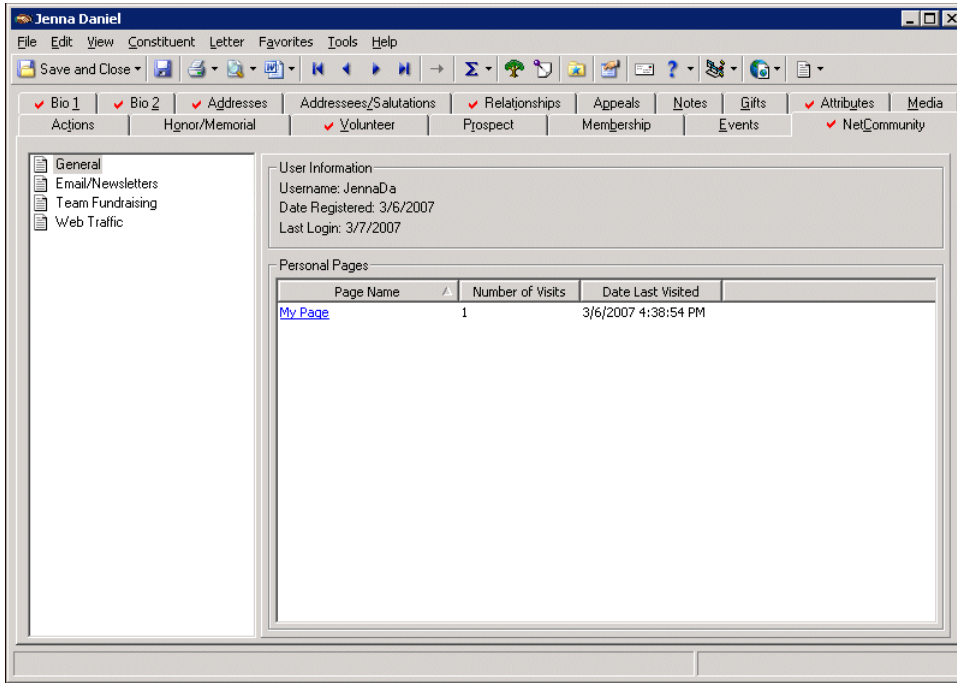
On the NetCommunity tab, *The Raiser's Edge* organizes information from *Blackbaud NetCommunity* using four categories: **General**, **Email/Newsletters**, **Team Fundraising**, and **Web Traffic**.

The categories appear in the list on the left side of the NetCommunity tab. When you select a category, the right side of the screen displays the fields, frame, checkboxes, and options specific to the selected category. For example, when you select the **Email/Newsletters** category, the right side of the screen displays email information about the constituent from *Blackbaud NetCommunity*, including information from the constituent's user profile and about email sent to the constituent.

If the constituent is not a registered user on your *Blackbaud NetCommunity* website and has not been sent email from *Blackbaud NetCommunity*, or if the constituent record is not linked to a user record in *Blackbaud NetCommunity*, the message “This constituent is not linked to an account in NetCommunity” appears on the NetCommunity tab.

General

To view general information about the **Blackbaud NetCommunity** user, including user profile information and activity on the constituent's personal pages, select the **General** category.



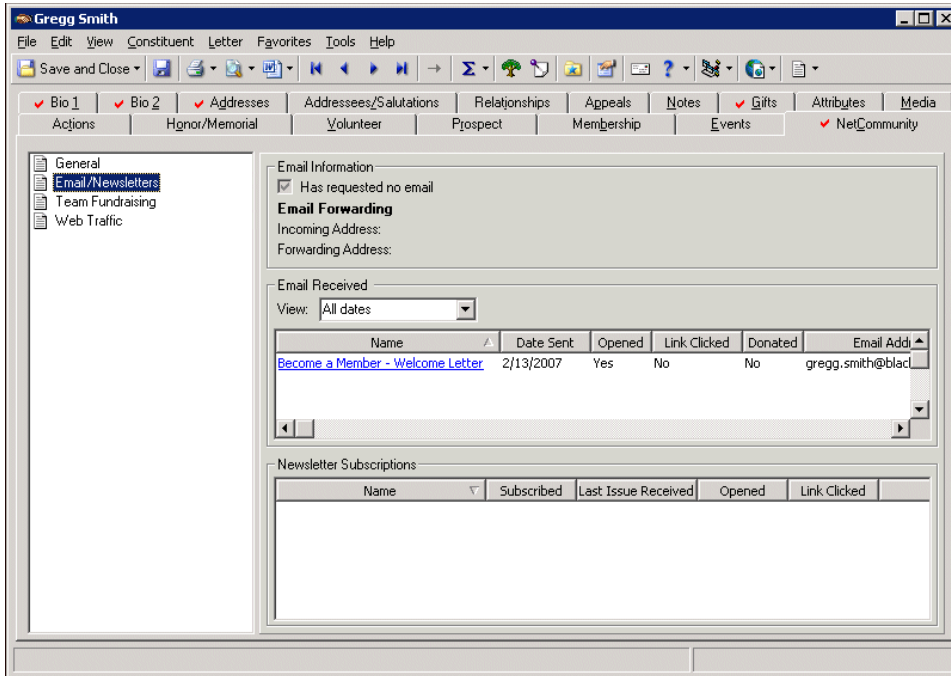
User Information. In the **User Information** frame, the **Username** field displays the constituent's user ID from **Blackbaud NetCommunity**. In the **Date Registered** and **Last Login** fields, information about when the constituent registered on your **Blackbaud NetCommunity** site and when he or she last logged into the site appear.

Personal Pages. In **Blackbaud NetCommunity**, you can allow constituents to set up personalized pages on your website to share information about themselves and help communicate your organization's mission. In the **Personal Pages** grid, you can view information about activity on the constituent's personal pages. The **Page Name** column lists the names of the constituent's personal pages on your **Blackbaud NetCommunity** site. For each personal page, you can track the number of visits it receives and when it was last visited.

The listings in the **Page Name** column link to their respective personal pages on your **Blackbaud NetCommunity** website. To access a constituent's personal page on your website, click its listing in the **Page Name** column.

Email/Newsletters

To view email information from **Blackbaud NetCommunity** about the constituent, including information from the user profile and about email sent to the constituent, select the **Email/Newsletters** category.



Note: When the **Has requested no email** checkbox is marked, the **Requests no email** checkbox on the Bio 1 tab is automatically marked. Similarly, if, on the Bio 1 tab, you unmark **Requests no email**, the **Has requested no email** checkbox is automatically unmarked.

Email Information. The **Email Information** frame displays information about the constituent's email addresses, as entered on the User Profile Form on your **Blackbaud NetCommunity** website. If, on the User Profile Form, the constituent requests to receive no email, the **Has requested no email** checkbox is marked. When this checkbox is marked, the **Requests no email** checkbox on the constituent's Bio 1 tab is automatically marked as well.

In **Blackbaud NetCommunity**, you can allow forwarding of email to the user's personal email address and enter an incoming and forwarding email address. Under **Email Forwarding** on the NetCommunity tab, you can view the constituent's incoming address and forwarding address from **Blackbaud NetCommunity**. The listings under **Email Forwarding** link to the respective email address. To send an email to the constituent at an address that appears under **Email Forwarding**, click its listing.

Email Received. In the **Email Received** grid, you can view information about the email messages and acknowledgements **Blackbaud NetCommunity** sends to the constituent.

To filter the email that appear in the grid, in the **View** field, select the send dates of the email to view. You can select to view email sent this week, month, quarter, or year. To view all email sent to the constituent, select "All dates".

Note: If the constituent receives a message but does not display its images or click a link in the email, the email is not considered as opened.

In the grid, the **Name** column lists the names of the email sent to the constituent. For each email in the grid, you can view summary information from **Blackbaud NetCommunity**, including the date it was sent; whether its delivery was successful; the email address to which it was sent; and whether the constituent opened the email, clicked a link in it, or made a donation to your organization in response to it.

The listings in the **Name** column link to the respective messages and acknowledgements in **Blackbaud NetCommunity**. To access an email sent to the constituent, click its listing in the **Name** column.

Newsletter Subscriptions. In the **Newsletter Subscriptions** grid, you can view information about the newsletters **Blackbaud NetCommunity** sends to the constituent.

Note: If the constituent receives a newsletter but does not display its images or click a link in the email, the email is not considered as opened.

In the grid, the **Newsletter** column lists the names of the newsletters sent to the constituent. For each newsletter in the grid, you can view summary information from **Blackbaud NetCommunity**, including whether the constituent subscribes to the newsletter; the date of the last issue sent to the constituent; and whether the constituent opened the newsletter or clicked a link in it.

The listings in the **Newsletter** column link to the respective newsletters in **Blackbaud NetCommunity**. To access a newsletter sent to the constituent, click its listing in the **Name** column.

Team Fundraising

If you use Fundraiser part types in **Blackbaud NetCommunity**, you can track the constituent's Team Fundraising activity and progress. To view information about the constituent's Team Fundraising efforts, select the **Team Fundraising** category.

The screenshot displays the Blackbaud NetCommunity interface for a constituent named Matt Daniel. The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation pane with tabs for Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, and NetCommunity. The main content area shows a 'Fundraiser' dropdown menu set to 'Gift Annuity Fund'. Below this is a 'Participant Progress Summary' section. On the left of this section is a thermometer graphic. To the right of the thermometer is a table with the following data:

Goal:		Individual Goal:	\$100.00
Total Raised:	\$0.00		
Over(under):	\$100.00		
Percent of Individual Goal:	0.00%	Fund Goal:	\$0.00

Below the goal table is a 'Breakdown' section with the following data:

Total Donations:		received:	0	\$0.00
Online		received:	0	\$0.00
Offline		received:	0	\$0.00
Average Donation:				\$0.00
Largest Single Donation:				\$0.00
Number of Emails Sent:			0	

At the bottom of the main content area is a 'Sponsors' table with the following columns: Name, Date, Amount, and Comments.

Fundraiser. In the **Fundraiser** field, the drop-down list displays the fundraisers in **Blackbaud NetCommunity** to which the constituent is registered to participate as a team fundraiser. Select the fundraiser for which to view the constituent's activity and progress. The **Participant Progress Summary** frame and **Sponsors** grid display information about the constituent's team fundraising efforts for the selected fundraiser.

Participant Progress Summary. In the **Participant Progress Summary** frame, the thermometer displays the constituent's progress toward his or her individual goal in the selected fundraiser.

Note: To ensure an accurate representation of the total amount raised, the **Total Raised** field excludes recurring gifts and payments toward pledges.

In the **Goal** frame, you can view detailed information from **Blackbaud NetCommunity** about the constituent's progress towards his or her individual goal for the selected fundraiser. This information includes the total raised, the constituent's individual goal, how over or under the individual goal the total raised is, the team goal, the percentage of the individual goal the constituent has raised, and the fund goal.

In the **Breakdown** frame, you can view detailed information from **Blackbaud NetCommunity** about the donations the constituent's fundraising efforts receive. This information includes the quantity and monetary sum of the total donations received, and how much of those totals come from online and offline donations. You can also view the average donation amount, the largest single donation, and the number of email the constituent sent to solicit the donations.

Sponsors. In the **Sponsors** grid, you can view information from **Blackbaud NetCommunity** about the constituent's sponsors for the selected fundraiser.

In the grid, the **Name** column lists the names of the sponsors who donate to the constituent's fundraising efforts. For each sponsor, you can view the date he or she donated and the amount donated. You can also view any comments the sponsor posts on the constituent's team fundraising page on your **Blackbaud NetCommunity** site.

Web Traffic

To view information about the constituent's browsing activity on your **Blackbaud NetCommunity** website, including the pages most frequently and most recently accessed, select the **Web Traffic** category.

The screenshot shows a web browser window titled "Roger B. Langley" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation menu with various categories like Bio 1, Bio 2, Addresses, etc. The "Web Traffic" category is selected in the left-hand navigation pane. The main content area is divided into three sections:

- Top 5 Pages Visited:** A table showing the most frequently visited pages. The "View" dropdown is set to "All dates".

Page	Page Visits
My HHI - Profile - Update	43
Login Page	90
My HHI - My Profile	103
Home Page	139
- Last Pages Visited:** A table showing the most recently visited pages. The "View" dropdown is set to "5".

Page	Date of Visit
Home Page	3/6/2007
Login Page	1/9/2006
Home Page	1/9/2006
MY HHI - Profile Disclav	1/9/2006
- Visit Summary:** A section with a "View Visits Per:" label and a "Year" dropdown menu. A blue triangle graphic is visible below this section.

Top 5 Pages Visited. In the **Top 5 Pages Visited** grid, you can view the pages on your **Blackbaud NetCommunity** website the constituent most frequently logs into over a selected period of time. In the **View** field, select the date range of the activity to view. You can select to view the five pages most frequently logged into during this week, last week, this month, or last month. To view the five pages the constituent has logged into most frequently since he or she registered at your website, select "All dates".

In the grid, the **Page** column lists the name of the five pages the constituent most frequently logged into during the selected date range. For each page, you can view how many times the constituent logged in during the selected date range.

The listings in the **Page** column link to the respective page on your **Blackbaud NetCommunity** website. To access a page visited by the constituent, click its listing in the **Page** column.

Last Page Visited. In the **Last Page Visited** grid, you can view the pages on your **Blackbaud NetCommunity** website the constituent most recently logged into.

In the **View** field, select how many pages to view in the grid. You can select to view 5, 10, or 25 pages.

In the grid, the **Page** column lists the name of the pages the constituent most recently logged into. For each page, you can view the date the constituent last logged in.

The listings in the **Page** column link to the respective page on your **Blackbaud NetCommunity** website. To access a page visited by the constituent, click its listing in the **Page** column.

Visit Summary. The **Visit Summary** frame displays how frequently the constituent logs into your **Blackbaud NetCommunity** website over a selected interval. In the **View Visits per** field, select the time interval to view.

- To view how often the constituent logs into your site per day over the past 15 days, select “Day”.
- To view how often the constituent logs into your site per week over the past three months, select “Week”.
- To view how often the constituent logs into your site per month over the past year, select “Month”.
- To view how often the constituent logs into your site per quarter over the past three years, select “Quarter”.
- To view how often the constituent logs into your site per year over the past decade, select “Year”.

NetCommunity Gift Record

Note: For more information about gift records, see the *Gift Records Guide*.

When you integrate **The Raiser’s Edge** with **Blackbaud NetCommunity**, you can view on a gift record in **The Raiser’s Edge** whether the gift is a donation from **Blackbaud NetCommunity**. You can open the gift record from the Gifts page of **Records**. On the Miscellaneous tab, the **NetCommunity gift** checkbox indicates whether the gift was downloaded from **Blackbaud NetCommunity**.

The screenshot shows a web application window titled "Gift for Robert C. Hernandez". The window has a menu bar (File, Edit, View, Gift, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with tabs for Gift, Miscellaneous, Soft Credit, Matching Gifts, Tribute, Attributes, Transactions, Amendments, and Split Gift. The "Gift" tab is active, showing a form with the following fields:

- Gift ID: 896
- GL post status: Do Not Post
- Gift code: (empty dropdown)
- GL post date: 9/9/2007
- Constituency: Board Member
- Marketing source code: (empty text box)
- NetCommunity Gift
- Mailing ID: (empty text box)
- Gift is anonymous
- Finder Number: (empty text box)

At the bottom of the window, a Notepad application is open with a single tab titled "New Notepad". The Notepad window has a menu bar (File, Edit, View, Format, Help) and a toolbar with icons for New, Open, Save, Print, and Delete. The Notepad window is currently empty.

Note: When you update to *The Raiser's Edge 7.82* and have downloaded donations in your database, the **NetCommunity gift** checkbox is automatically marked on the existing records.

When a donation is downloaded through the NetCommunity plug-in, the **NetCommunity gift** checkbox is automatically marked on the gift record. You can also manually mark this checkbox as necessary. For example, the constituent tries to donate online but cannot successfully do so, such as due to temporary server issues, and instead calls into your organization to donate. To record the gift as an online donation, you can mark **NetCommunity gift**.

NetCommunity Event Participant Record

Note: For more information about participant records, see the *Event Management Data Entry Guide*.

When you use the optional module *Event Management*, you can view on a registrant, guest, or sponsor record whether the participant registered for the event at your **Blackbaud NetCommunity** website. You can access the participant record from the Participants tab of the event record, which you can open from the Events page of *Records*. On the General tab of the participant record, the **NetCommunity registration** checkbox indicates whether the participant's registration was downloaded from **Blackbaud NetCommunity**.

The screenshot shows a software window titled "Mark D. Adamson (Registrant)". The window has a menu bar (File, Edit, View, Participant, Tools, Help) and a toolbar with icons for Save and Close, Print, and navigation. The "Registrant" field contains "Mark D. Adamson". On the left, there is a "Registered Events" list with "Yearly Gala Balls" and "Spring Ball". The main area has several tabs: General, Travel, Registration Fees (selected), Participation, Donations, and Attributes/Notes. Under the "Registration Fees" tab, there are fields for Solicitor, Invite? (Invited), Participation (Attendee), Response (Accepted), Status (Paid), and Registration (Registered). There is also a "Seating" section with a "Seating" tab, "Seat: Not yet assigned", and a "Do not seat this Participant" checkbox. At the bottom, there are checkboxes for "Participant has attended", "Participant is a coordinator", and "NetCommunity registration" (which is checked). There are also buttons for "Awards", "Tags/Cards", "Guests", and "Other".

Note: When you update to *The Raiser's Edge 7.82* and have downloaded event registrations in your database, the **NetCommunity registration** checkbox is automatically marked on the existing records.

When an event registration transaction is downloaded from **Blackbaud NetCommunity**, the **NetCommunity registration** checkbox is automatically marked on the participant record. You can also manually mark this checkbox as necessary. For example, the constituent tries to register online but cannot successfully do so due to temporary server issues, and instead calls into your organization to register. To record the registration as an online transaction, you can mark **NetCommunity registration**.

NetCommunity Membership Record

Note: For more information about membership records, see the *Membership Data Entry Guide*.

If you use the optional module *Membership Management*, you can view on a membership record in *The Raiser's Edge* whether the member registered at your **Blackbaud NetCommunity** website. You can open the membership record from the Memberships page of *Records*. On the Membership tab, the **NetCommunity transaction** checkbox indicates whether the member's registration was downloaded from **Blackbaud NetCommunity**.

Membership for Lucy G. Avdeenko

File Edit View Membership Favorites Tools Help

Save and Close

Membership Membership History Attributes/Notes

Constituent: Lucy Avdeenko ID: 48 **Active**

Current Transaction Type: Join

Membership ID: 2 NetCommunity transaction

Dues: \$5,000.00 Autg Pick Solicitors

Program: Individual Members & Cards Members: 1 Children: 0

Category: Lifetime Gift of Membership No gift of membership

Subcategory: Benefits Send to primary member

Date joined: 7/1/2005 Lifetime Link to Gifts...

Expires on: Print renewal notices Past Renewals

Summary Membership Information

Date joined: 7/1/2005	Last renewed: N/A	Last dropped: N/A
Total years: 1	Times renewed: 0	Consecutive years: 1

Note: When you update to *The Raiser's Edge 7.82* and have downloaded membership registrations in your database, the **NetCommunity transaction** checkbox is *not* automatically marked on the existing records.

When a membership registration transaction is downloaded from **Blackbaud NetCommunity**, the **NetCommunity transaction** checkbox is automatically marked on the membership record. You can also manually mark this checkbox as necessary. For example, the constituent tries to register online but cannot successfully do so due to temporary server issues, and instead calls into your organization to register. To record the registration as an online transaction, you can mark **NetCommunity transaction**.

NetCommunity Job Assignment Record

Note: For more information about job assignment records, see the *Volunteers and Jobs Data Entry Guide*.

If you use the optional module *Volunteer Management* and integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, you can view on a job assignment record whether the volunteer requested the job at your *Blackbaud NetCommunity* website. You can access the job assignment record from the Volunteers tab of the constituent record or the job record, which you can open from the Jobs page of *Records*. On the job assignment record, the **NetCommunity Job request** checkbox indicates whether the volunteer's job request was downloaded from *Blackbaud NetCommunity*.

The screenshot shows a window titled "Job Assignment for Daniel R. Snyder". The menu bar includes File, Edit, View, Job Assignment, and Help. The toolbar contains icons for Save and Close, a printer, a red X, navigation arrows, a question mark, and a help icon. The form fields are as follows:

- Job: Decorations (with a lock icon) Walk-A-Thon
- Status: Assigned Requested on: [calendar icon]
- NetCommunity Job request
- Department: Sporting Events (dropdown) Position: Design decorator (text)
- Location: [dropdown] Task: Putting up signs and balloons (dropdown)
- Category: Day of Walk (dropdown) Volunteer type: [dropdown]
- Start date: 7/29/2006 (calendar) Start time: 7:00 AM (text) Supervisor: Meredith Bailey (text)
- End date: 7/29/2006 (calendar) End time: 8:30 AM (text) Day of week: Saturday (dropdown)
- Letter sent on: [calendar]
- Notes: [text area]

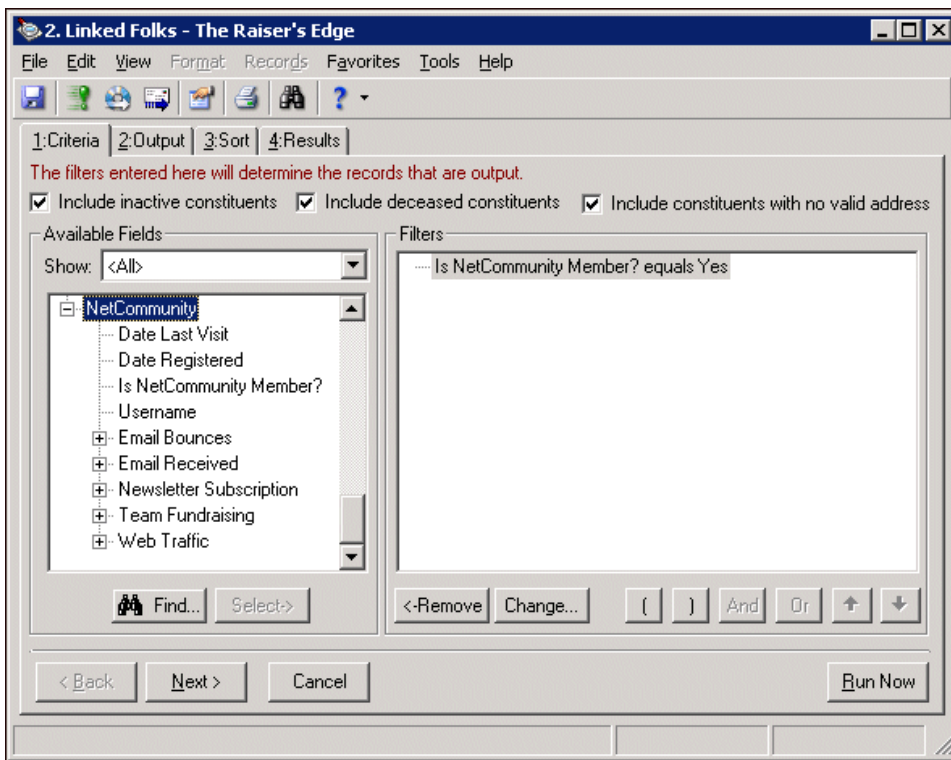
Note: When you update to *The Raiser's Edge 7.82* and have downloaded job requests in your database, the **NetCommunity Job request** checkbox is *not* automatically marked on the existing records.

When a volunteer job request transaction is downloaded from *Blackbaud NetCommunity*, the **NetCommunity Job request** checkbox is automatically marked on the job assignment record. You can also manually mark this checkbox as necessary. For example, the constituent tries to enter the job request online but cannot successfully do so due to temporary server issues, and instead calls into your organization to volunteer. To record the job request as an online transaction, you can mark **NetCommunity Job request**.

NetCommunity Query Criteria and Output

Note: For more information about queries, see the *Query and Export Guide*.

When you integrate with **Blackbaud NetCommunity**, you can include information from **Blackbaud NetCommunity** in the criteria and output fields you use to create queries in **The Raiser's Edge**.

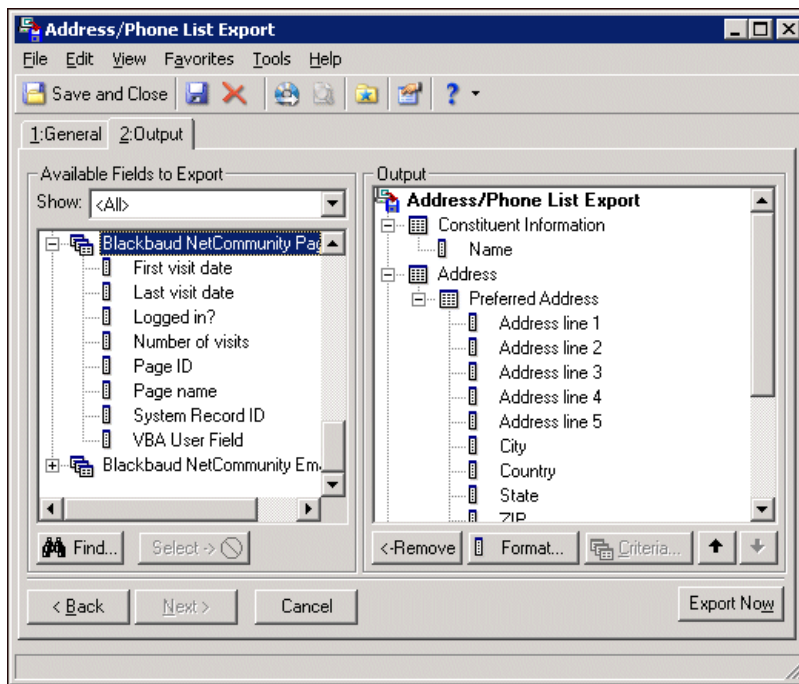


- For constituent queries or queries that use constituent criteria and output fields, you can select **NetCommunity** fields.
- For gift queries or queries that use gift criteria and output fields, you can select a **NetCommunity gift** field.
- For participant queries or queries that use event participant criteria and output fields, you can select a **NetCommunity registration** field.
- For membership queries or queries that use membership criteria and output fields, you can select a **NetCommunity transaction** field.
- For job queries or queries that use job assignment criteria and output fields, you can select a **NetCommunity Job request** field.

NetCommunity Export Output

Note: For more information about exports, see the *Query and Export Guide*.

When you integrate with **Blackbaud NetCommunity**, you can include information from **Blackbaud NetCommunity** in the output fields you export from **The Raiser's Edge**.



- For constituent exports or export that use constituent output fields, you can select **NetCommunity** fields.
- For gift exports or exports that use gift output fields, you can select a **NetCommunity gift** field.
- For participant exports or exports that use event participant output fields, you can select a **NetCommunity registration** field.
- For membership exports or exports that use membership output fields, you can select a **NetCommunity transaction** field.
- For job exports or exports that use job assignment output fields, you can select a **NetCommunity Job request** field.

Online vs. Offline Giving Report

Note: For a detailed explanation of each report and instructions on how to generate a report, see the *Reports Guide*. For a sample of each report, see the *Sample Reports Guide*.

When you integrate with **Blackbaud NetCommunity**, the Online vs. Offline Giving Report is available. Accessed through *Reports* on the Raiser's Edge bar, this financial report allows you to compare gifts received through your **Blackbaud NetCommunity** website with constituent giving through other means during a time period you define. The exact data included depends on your parameter tab settings.

- The summary report compares totals of gifts received within the date range for each campaign, fund, appeal, or constituent code. You can graph the results of the summary report.

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Online vs. Offline Giving Report

Start Date:		End Date:		Online		Offline		Variance	
Fund ID	Description	No. Gifts	Amount	No. Gifts	Amount	Amount	%		
2002MEMBER	2002 Membership Fu	0	\$0.00	1	\$1,000.00	(\$1,000.00)	0.00 %		
2004ANNUAL	2004 Annual Fund	0	\$0.00	1	\$125.00	(\$125.00)	0.00 %		
2004MEMBER	2004 Membership Fu	0	\$0.00	1	\$2,000.00	(\$2,000.00)	0.00 %		
2005ANNUAL	2005 Annual Fund	0	\$0.00	1	\$200.00	(\$200.00)	0.00 %		
2007ANNUAL	2007 Annual Fund	0	\$0.00	1	\$75.00	(\$75.00)	0.00 %		
GARDEN	Botanical Garden Fun	0	\$0.00	2	\$6,000.00	(\$6,000.00)	0.00 %		
BUILDING	Building Fund	11	\$9,125.00	0	\$0.00	\$9,125.00	0.00 %		
PLAYGROUND SI	Playground Site	6	\$625.00	1	\$75.00	\$550.00	8.33 %		
7 donors	Totals:	17	\$9,750.00	8	\$9,475.00	\$275.00	1.03 %		

- The detail report presents the same information as the summary report and adds constituent information.

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Online vs. Offline Giving Report

Start Date:		End Date:		Online		Offline		Variance	
Constituent Name	Date	Fund							
Keleey Daniel	07/13/2007	Building Fund		\$250.00		\$0.00			
	07/13/2007	Playground Site		\$25.00		\$0.00			
	07/13/2007	Building Fund		\$100.00		\$0.00			
				Online Giving: \$375.00		Offline Giving: \$0.00		Variance \$: \$375.00	
				Online Gifts: 3		Offline Gifts: 0		Variance %: 0.00 %	
Matt Daniel	05/07/2007	Playground Site		\$25.00		\$0.00			
	07/18/2007	Building Fund		\$750.00		\$0.00			
				Online Giving: \$775.00		Offline Giving: \$0.00		Variance \$: \$775.00	
				Online Gifts: 2		Offline Gifts: 0		Variance %: 0.00 %	
Aqua Fina	07/18/2007	Building Fund		\$2,500.00		\$0.00			
	07/18/2007	Building Fund		\$100.00		\$0.00			
	07/18/2007	Playground Site		\$500.00		\$0.00			
				Online Giving: \$3,100.00		Offline Giving: \$0.00		Variance \$: \$3,100.00	
				Online Gifts: 3		Offline Gifts: 0		Variance %: 0.00 %	
George D. Finley	09/25/2002	2002 Membership Fund		\$0.00		\$1,000.00			
	01/15/2004	2004 Membership Fund		\$0.00		\$2,000.00			
	06/25/2004	2004 Annual Fund		\$0.00		\$125.00			
	07/01/2005	2005 Annual Fund		\$0.00		\$200.00			
	03/07/2006	Botanical Garden Fund		\$0.00		\$5,000.00			
	03/07/2007	2007 Annual Fund		\$0.00		\$75.00			
	05/08/2007	Building Fund		\$100.00		\$0.00			
	07/18/2007	Playground Site		\$25.00		\$0.00			
	07/18/2007	Building Fund		\$2,400.00		\$0.00			
	03/20/2008	Botanical Garden Fund		\$0.00		\$1,000.00			
	05/25/2008	Playground Site		\$0.00		\$75.00			
					Online Giving: \$2,525.00		Offline Giving: \$9,475.00		Variance \$: (\$6,950.00)
				Online Gifts: 3		Offline Gifts: 8		Variance %: 0.27 %	
Kevin Mulvaney	08/08/2007	Building Fund		\$100.00		\$0.00			
	08/08/2007	Playground Site		\$25.00		\$0.00			
	08/08/2007	Building Fund		\$2,500.00		\$0.00			

