The Raiser's Edge™

Global Add, Delete, & Change Guide

Contents

What Is In This Guide?

In the *Global Add, Delete, & Change Guide*, you learn about the global functionality available in **The Raiser's Edge**. For further information about *Global Add, Delete, & Change*, see the following.

- "Globally Add Records" on page 1
- "Globally Change Records" on page 31
- "Globally Delete Records" on page 55
- "Fields You Can Globally Add, Delete, & Change" on page 75

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. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site 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 7** 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.

Narrow your search in the help file by enclosing 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.

Globally Add Records

Procedures

Using **Globally Add Records**, *The Raiser's Edge 7* makes it easy to add information to a group of records in your database. For example, instead of using valuable hours adding an appeal to each constituent record, you can add the appeal to all or selected records with just one process and without opening every constituent record. You can even send email messages to all or selected constituents. *The Raiser's Edge* does not, however, check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

Warning: Before performing a global add, we strongly recommend you completely back up your database. To successfully back up your data, you must first shut down the database.

After running the global add, you can view a control report, detailing all the changed records in your database and explaining any exceptions. You can also create a query of the records included in the global add to use in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*, and you can create an exception query, displaying all records the program could not include in the global add.

Please be aware, once you add information to records, the records are permanently changed in your database.

Navigating in Globally Add Records

Warning: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the record.

The Global Add page contains the commands necessary to complete all global add functions. You can use a variety of parameters to define a global add process.

To access the Global Add screen, click **Globally Add Records** on the Administration page.

Warning: Security limitations may prevent some users from accessing **Globally Add Records**. See the Security chapter in the *Configuration & Security Guide* for a information on establishing system security.

The Global Add screen appears.
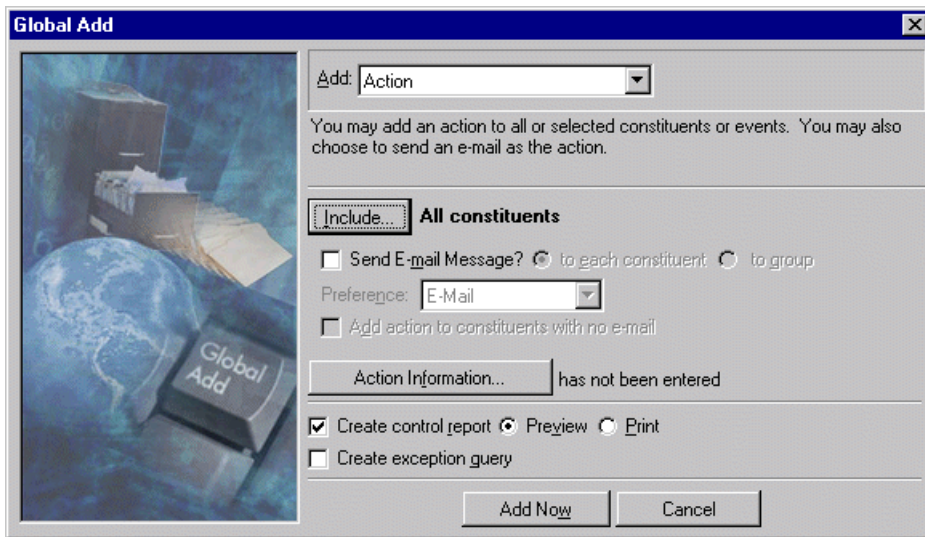
> **Note**: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

The fields, buttons, options, and checkboxes on the Global Add screen change slightly, based on the type of information you are adding. For example, if you select to add Action or Appeal information, the **Send Email Message?** checkbox appears, allowing you to send an email message to all constituents included in the global add process. Also, the title of the **Information** button in the middle of the Global Add screen changes based on the type of information you choose to add. For example, if you add Action information, the button reads **Action Information**; if you add Constituent Attributes, the button reads **Attribute Information**.

▶ **Opening Globally Add Records**

> **Note**: When you establish security for *The Raiser's Edge*, a user can be assigned to more than one group. If a user belongs to multiple groups and one group has system level rights to records that the other does not, the user does not have rights to those records. For more information about security, see the Security chapter in the *Configuration & Security Guide*.

1. On the Raiser's Edge bar click **Admin**. The Administration page appears.

2. Click **Globally Add Records**. The Global Add screen appears.

3. Select the type of information you want to **Add**, identify the records you want to **Include** in the procedure, and enter the specific information you want added to the records. You can also select to run a control report and create a query of records to which the information could not be added.

4. To add the selected information to the database, click **Add Now**. After you run the global add procedure, you return to the Administration page.

Business Rules

Established in *Configuration*, business rules improve data entry speed and help verify the data is correct.

> **Note**: For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

With business rules, you can perform common tasks in two categories: those with predefined rules and those with rules that you define. Predefined rules are for the most part set up by marking a series of checkboxes and options. They govern a wide variety of functions, such as rules for adding gifts and what constitutes duplicate criteria during searches.

User Options

> **Note**: For more information about User Options, see the *Program Basics Guide*.

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options for your workstation.

Parts of the Global Add Screen

The Global Add screen is essentially the same, regardless of the information you choose to add.
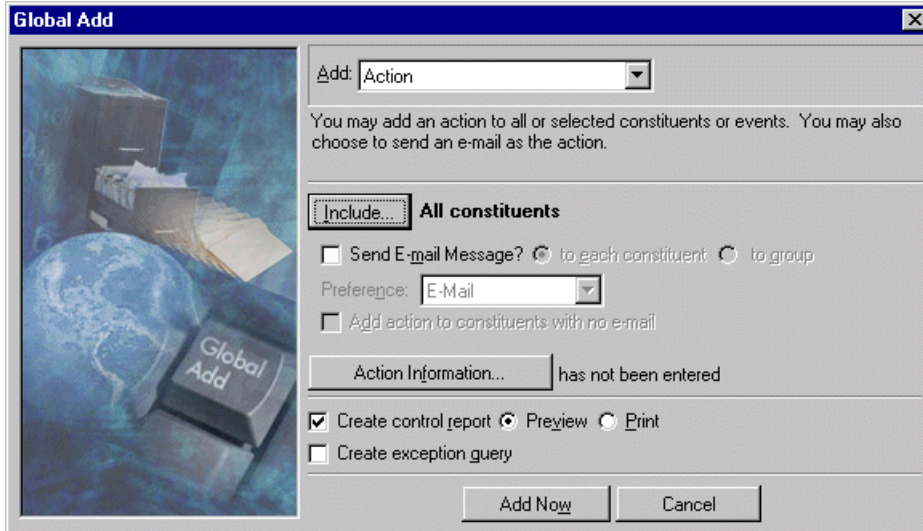
However, when adding actions or appeals to records, you can include an email message, and option names change slightly based on the information type you select. Also, the screen accessed when you click the **Information** button changes based on the information being added. For example, if you are adding Actions and you click the **Action Information** button, the New Action screen appears; if you are adding Memberships and click the **Membership Information** button, the New Membership screen appears.

This section includes a general description of fields, buttons, checkboxes, and options you may find while working on a Global Add screen. For specific instructions on completing the Global Add screen, see "Globally Adding Records Basics" on page 22.

Add. In the **Add** field select the type of information you want to add to your records. For example, if you want to add a phone call action to constituent records, select "Action" in the **Add** field; if you want to add a note to constituent records, select "Notepad" in the **Add** field. The following information types are available in **Globally Add Records**.

- Action
- Business
- Education/School
- Membership
- Constituent Attributes
- Registrants for an event
- Guests for an event
- Assigned Solicitor
- Volunteer Checklist Items

- Appeal
- Email
- Bank/Financial Institution
- Notepad
- Constituent Codes
- Sponsors for an event
- Proposal
- Volunteer Award
- Volunteer Time Sheet

Add action to constituents with no email. If you add Action or Appeal information and you send an email message, the **Add action to constituents with no email** checkbox appears. To add the action to constituents regardless of whether they have an email address, mark this checkbox.

To include constituents who do not have email addresses in an exception query when you run the global add, do not mark this checkbox. You can use this list of exceptions to easily identify constituents who did not get the email message and notify them some other way.

Create control report. If you mark the **Create control report** checkbox, the program generates a report after it runs the global add process. The report includes details about the affected records and a list of any records to which the selected information was not added (exceptions). It also gives reasons for any exceptions. Select the **Preview** option to view the report on your screen. Select the **Print** option to print the control report.

Note: We recommend creating an exception query so you can see which records could not accept the global add.

Create exception query. If you mark the **Create exception query** checkbox, the program generates a query of all records that satisfied the global add criteria but were not changed. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports* or to run the global add process again.

Event. If you are adding registrants, sponsors, or guests for an event, in the **Event** field, you must select the event to which you are adding these participants. Click the binoculars to access the Open screen. From this screen, you can locate the event in your database and click **Open**. You return to the Global Add screen, and the event you selected appears in the **Event** field. You cannot add events from the Global Add screen.

Note: For more information about working with queries, see the Query chapter in the *Query & Export Guide*.

Include. Use the **Include** button to select records to include in the global add. You can add selected information to all records in your database or use queries to select specific records to which to add information. If you choose selected records, the Open Query screen appears. You must select an existing query and click **Open** or click **Add New** to access *Query* and create a new query.

```
In
   All Constituents
   Selected Constituents
```
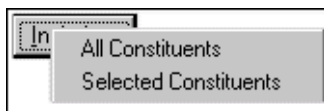
Information. This button changes based on the type of information you select to add to records in your database. For example, if you add an action, the button reads **Action Information**; if you add a membership, the button reads **Membership Information**.

Send Email Message. If you select Action, Appeal, or Email in the **Add** field on the Global Add screen, you can compose and send an email message to selected constituents. Mark the **Send Email Message?** checkbox. To send an individual message to each constituent, select the **to each constituent** option. If a group email is acceptable, with each constituent's name appearing in the **To** field of the email message screen, select **to group**.

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

Update number invited. If you are adding registrants, sponsors, or guests to an event, mark the **Update number invited** checkbox, and the program automatically updates the **No. invited** field on the General tab of the event record.

Note: For more information about appeals, see the???? *Guide*.

Update number solicited. If you are adding Appeal information, mark the **Update number solicited** checkbox, and the program automatically updates the **No. solicited** field on the General tab of the appeal record.

Types of Information You can Add

Globally Add Records helps you maintain your *Raiser's Edge* records. You can update a select group or all records in your database in one simple process, without opening each record. Simply select the type of information you want to add, the records to which you want the information added, and the information you want to add. The Global Add screen takes you through each necessary step.

The exact steps included in the process vary, based on the type of information you want to add. For example, if you want to add action or appeal information to records, in addition to selecting the records and entering the information you want to add, you can also send an email message to the selected constituents. The email message option is not available for the other information types.

> **Note**: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

This section includes a detailed explanation of the types of information you can globally add to records in *The Raiser's Edge*.

Actions

> **Warning**: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

In *The Raiser's Edge*, actions are the communications between you and your constituents as you go about your fundraising activities. In your organization, these actions may include telephone calls, meetings, mailings, email messages, and tasks.

On the Global Add screen for actions, select the constituent or event records you want to include in the global add, if you want an email sent to the selected constituents, the action information you want added to the records, and any reports and queries you want to generate.

> **Note**: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

For example, several corporate donors are late paying the balance on a special pledge they made three years ago, during your organization's annual campaign. Because these are large amounts, your organization intends to contact the donors individually. Using **Globally Add Records**, you can globally set up actions on all of these corporate donors' records in one simple process, without opening each record.

Also, if you want to notify the constituents by email, you can compose and send the message to all or selected constituents from the Global Add screen if you mark the **Send Email Message?** checkbox. To send an individual message to each constituent, select the **to each constituent** option. If a group email is acceptable, with each constituent's name appearing in the **To** field of the email message screen, select **to group**.

Appeals

Appeals are the solicitations that bring in your gifts. These solicitations can include auctions, direct mailings, and phonathons.

> **Note**: For more information about appeals, see the Appeals chapter in the *Campaigns, Funds, & Appeals Guide*.

On the Global Add screen for Appeals, select the constituent records you want to include in the global add, if you want an email sent to the selected constituents, the appeal information you want added to the records, any reports and queries you want to generate, and if you want to automatically update the number solicited.

> **Note**: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, your organization mailed all constituents in your database a notice asking them to give to your 2004 Annual Appeal. However, this appeal is not currently associated with any constituent records. Using **Globally Add Records**, you can add this appeal to the Appeals tab of all or selected constituent records in one simple process, without opening each record. You can also send email messages to all your constituents, reminding them of the appeal notice.

Business Relationships

> **Note**: For more information about organization (business) relationships, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

With **The Raiser's Edge** you can track constituents' organization (business) relationships. The primary organization (business) relationship is usually the constituent's current employer. Employment information helps you solicit matching gifts or corporate contributions from the employer. The program stores information such as the organization name, industry, profession, job title, and income on the **Business** button of the Bio 1 tab, as well as on the Relationships tab of the constituent record.

Warning: *The Raiser's Edge* does not check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

On the Global Add screen for Business, select the constituent records you want to include in the global add, the business information you want added to the records, and any reports and queries you want to generate.
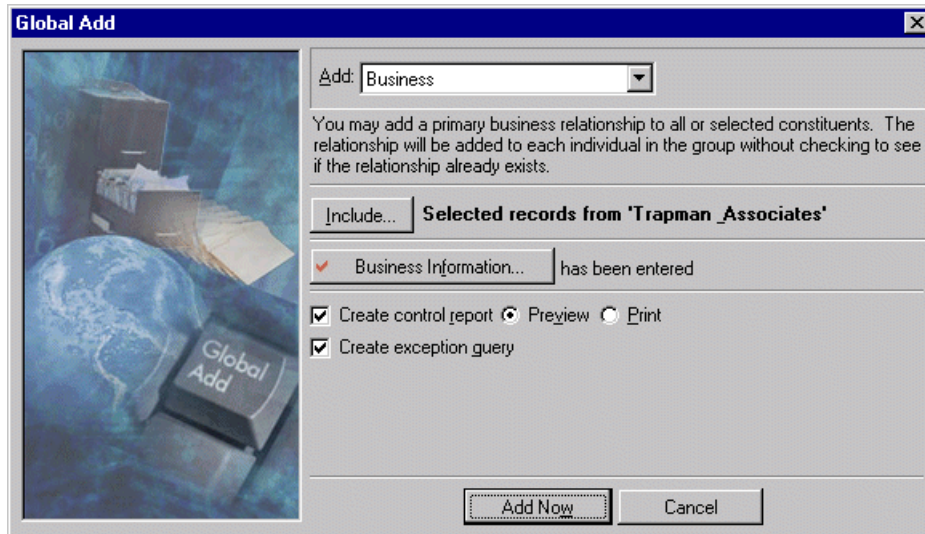
Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, you discover that 37 of your constituents are employed by Trapman & Associates. The company indicates it matches gifts given by its employees to your organization. You have a query of all Trapman & Associates employees. Using **Globally Add Records**, you can globally add the business relationship to this group of constituents in one simple process, without opening each record.

Email

You can use **Globally Add Records** to send an email message to selected or all constituent records in your database. The program uses the email address included with the constituent's preferred address. This information is entered in the **Phones/Email/Links** grid on the Bio 1 or Org 1 tab of the constituent record.
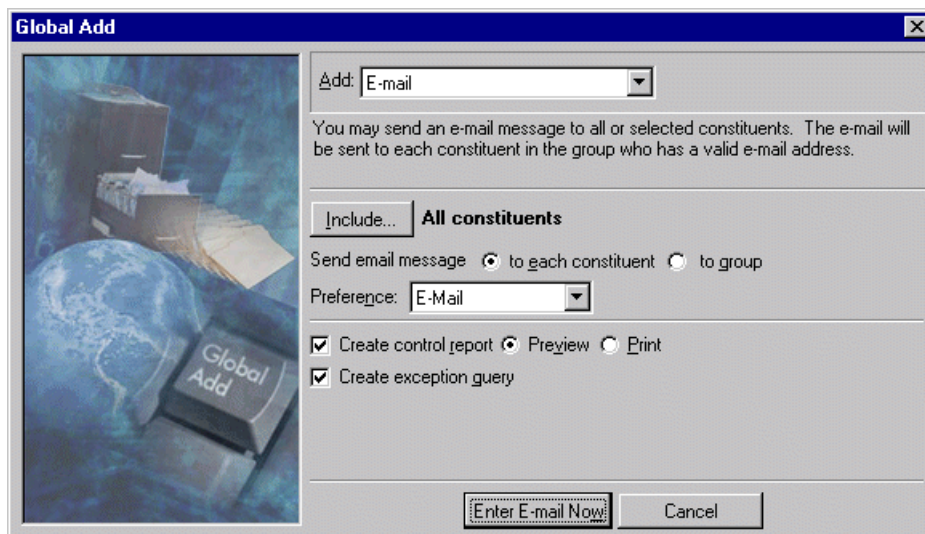
Warning: *The Raiser's Edge* does not check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

To send a global email message, on the Global Add screen for emails, select the constituent records to which you want to send the message, how you want the email sent to the selected constituents — one at a time or as a group — and any reports and queries you want to generate. When globally sending email messages, exceptions are generated if the constituent's preferred address does not contain a valid email address.

Education/School Relationships

Warning: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

An education relationship is an association between a constituent and a school or educational institution. The relationships serve to define the educational history of a constituent. You can track an unlimited number of different schools, from grammar school to graduate school. A school relationship can have its own constituent record or exist solely on the constituent record. If the school is a constituent in your database, the two records are linked together, and they display on each other's respective Relationships tab.

Note: For more information about the Global Add screen, see"Parts of the Global Add Screen" on page 5.

On the Global Add screen for Education/School, select the constituent records you want to include in the global add, the education information you want added to the Relationships tab of the records, and any reports and queries you want to generate.
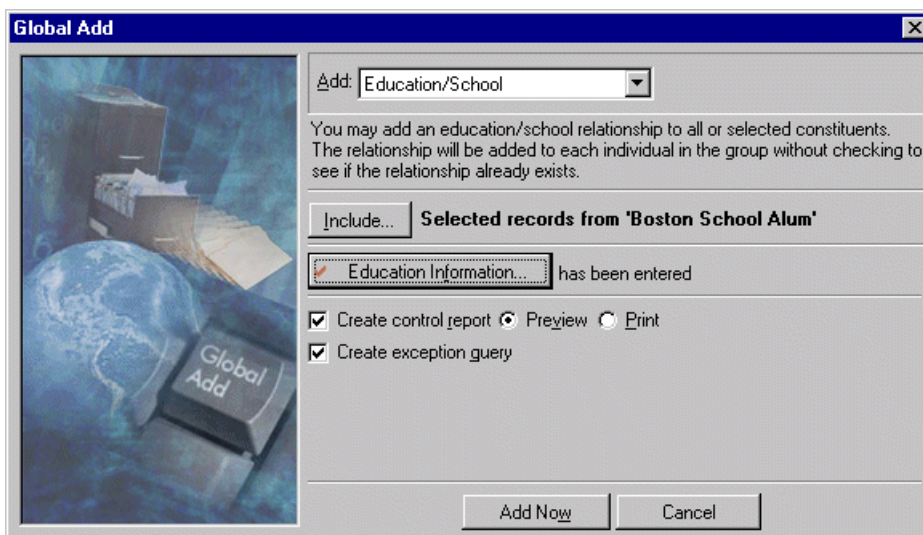
Note: For more information about education/school relationships, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

For example, a Boston School alumni group completed personal information cards for your organization, complete with basic biographical and educational information. However, not until after your volunteer enters the constituent records for each member of this group, does he realize they are all Boston School graduates. Boston School is already an organization constituent record in your database. Also, you created a query of the records just entered. Using **Globally Add Records**, you can establish an education/school relationship between the university and these new constituents in one simple process, without opening each record.

Bank/Financial Institution Relationship

Bank relationships are associations that your constituents have with banks or other financial institutions. Your constituents may have checking or savings accounts at a particular bank, or they may ask you to automatically withdraw funds on a monthly basis to pay a pledge. Tracking a constituent's bank information makes monetary transactions faster and easier for both you and the constituent. A bank must be listed in the **Financial Institutions** section of *Configuration* before it can be added to a constituent record as a relationship. For more information, see the Configuration chapter in the *Configuration & Security Guide.*

On the Global Add screen for Bank/Financial Institution, select the constituent records you want to include in the global add, the bank information you want added to the Relationships tab of the constituent records, and any reports and queries you want to generate.

Membership

Warning: Remember, *The Raiser's Edge* does not check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

If you have Membership Management*,* you can track multiple memberships and programs, produce reports to analyze membership activity, print lists and directories of members, link gift records to membership records, and perform specific mailing tasks, such as preparing membership cards and renewal notices. In addition, you can perform membership transactions, including locating lapsed members, dropping members who have not responded to renewal notices, upgrading or downgrading memberships, and renewing memberships for members who want to remain active.

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

On the Global Add screen for Membership, select the records you want to include in the global add process, the membership information you want added to the Membership tab of the records, and any reports and queries you want to generate.
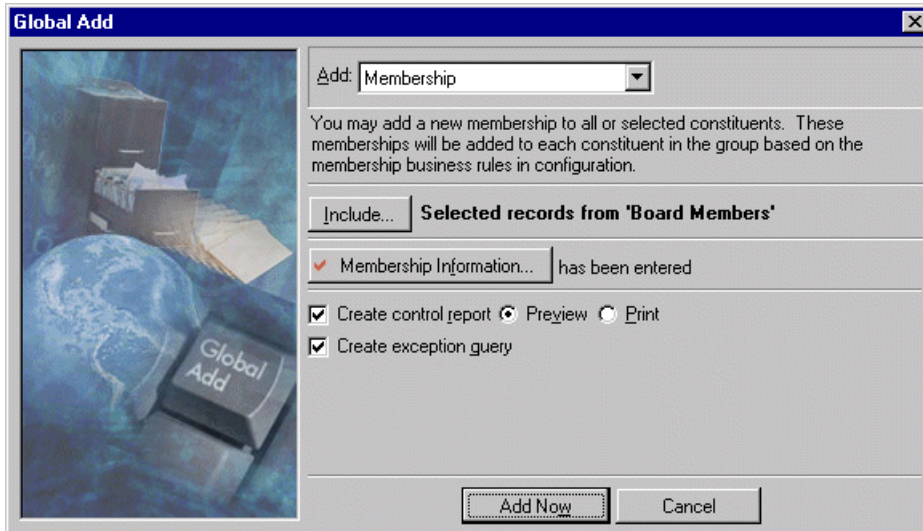
For example, your organization recently held its annual membership drive, and all Board Members agreed to upgrade from Individual to Lifetime memberships. You have a query of all your Board Members. Using **Globally Add Records**, you can add the new membership information to all the board members' records in one simple process, without opening each record.

Notepad

Note: For more information about notepads, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

In *The Raiser's Edge*, notepads make it easy to maintain helpful pieces of information you hear about your constituents and store unique information about your actions, events, gifts, and proposals. Each notepad has a **Date, Type, Title**, **Description**, and **Author**. The notepad itself accepts free-form text and holds an unlimited amount of information.

Warning: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

On the Global Add screen for Notepad, use the **Include** button to select the type of records you want to include in the global add: All Actions, All Constituents, All Events, All Gifts, or All Proposals. If you want to include on selected records, select Selected. You can then select or create a query of records you want to include.
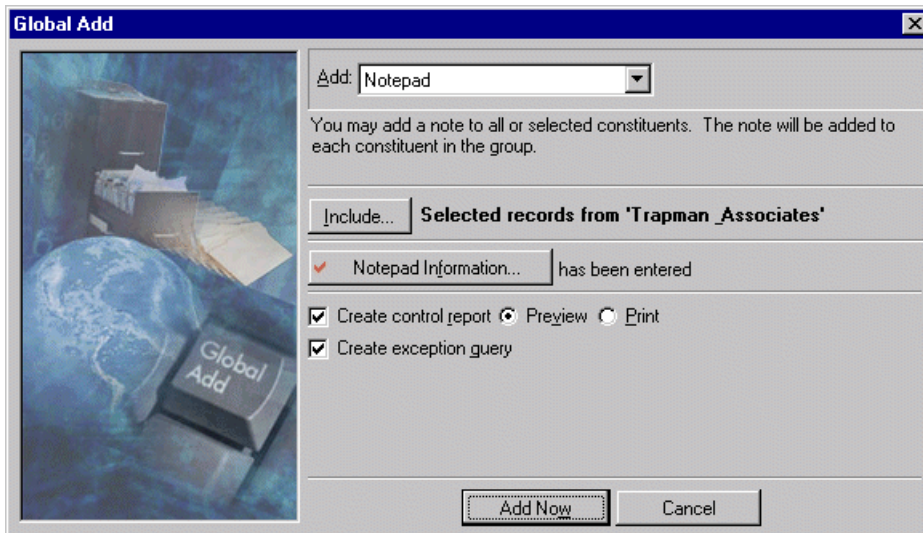
Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, employees with Trapman & Associates, one of your matching gift companies, make it known they prefer donating to specific projects. They do not like their money going for general operating expenses. You have a query of Trapman & Associates employees. Using **Globally Add Records**, you can add this information to the Notes tab of the employees' constituent records in one process, without opening each record.

Constituent Attributes

Note: For more information about constituent attributes, see the Constituent Records chapter in the *Constituent Data Entry Guide*.

In *The Raiser's Edge*, attributes are the qualities, characteristics, and preferences you associate with a record type. For example, constituent record attributes serve as a way for you to identify a constituent's special interests, dietary preferences, or mailing requests. Attributes may include hobbies, interests, activities, committees, and important dates. One of the most useful aspects about attributes is their flexibility. You can customize attributes to meet your organization's specific needs. Attributes are initially created and defined in *Configuration.* You enter constituent attribute information on the Attributes tab of the constituent record.

Note: For more information about setting up attributes *Configuration*, see the Configuration chapter in the *Configuration & Security Guide*.

On the Global Add screen for Constituent Attributes, select the constituent records you want to include in the global add, the attribute information you want to add to the Attributes tab of the records, and any reports and queries you want to generate.
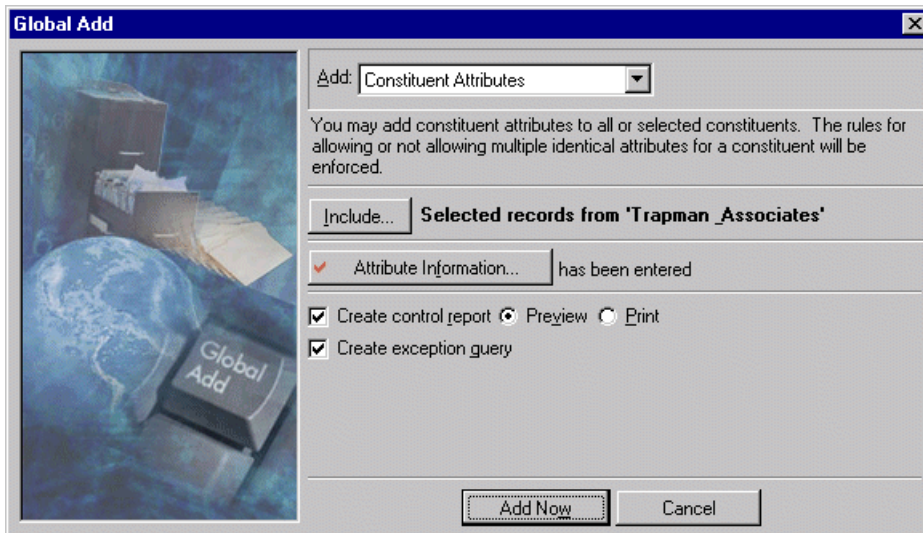
For example, you learn 130 employees with Trapman & Associates, one of your matching gift companies, have standard 9 a.m. to 5 p.m. business hours. Because this is a matching gift company, each employee has his own constituent record, and you have a query of all Trapman & Associates employees. Using **Globally Add Records**, you can add this information to the Attributes tab of the employees' constituent records in one process, without opening each record.

Constituent Codes

Note: For more information about constituent codes, see the Constituent Records chapter in the *Constituent Data Entry Guide*.

Constituent codes define the relationship a constituent has with your organization. In other words, a constituent code tells you why the constituent is in your database. Examples of constituent codes include Current Parent, Friend, Major Donor, Prospective Donor, and Board Member. Each constituent record in your database should have at least one constituent code listed. If you list more than one constituent code, always list the most important active constituent code first. *The Raiser's Edge* recognizes the first code listed as the primary constituent code.

On the Global Add screen for Constituent Codes, select the constituent records you want to include in the global add, the code information you want added to the Bio 2 or Org 2 tabs of the records, and any reports and queries you want generated.
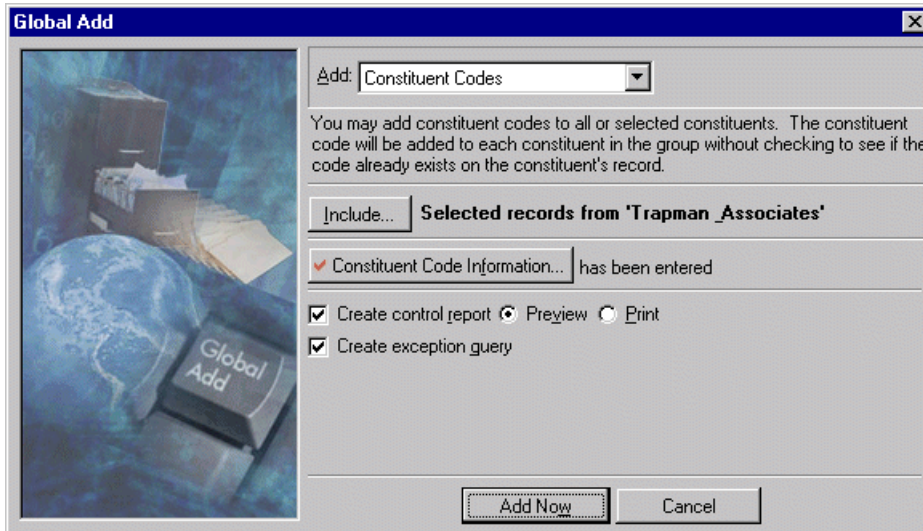
Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, 130 employees with Trapman & Associates, one of your matching gift companies, expressed an interest in volunteering for your organization. Because this is a matching gift company, each employee has his own constituent record, and you have a query of all Trapman & Associates employees. Using **Globally Add Records**, you can add this information to the Bio 2 tab of the employees' constituent records in one process, without opening each record.

Registrants for an Event

Registrants are the event's players, team captains, coordinators, instructors, vendors and other businesses that supply a service or product for the event, or any other person involved with the event.

Note: For more information about events and registrants, see the *Event Management Data Entry Guide*. Globally adding registrations is available only if you have Event Management.

On the Global Add screen for Registrants for an event, select the constituent records you want to include in the global add, the registrant information you want added to the Participants tab of the event record, the event record to which you want this information added, and any reports and queries you want to generate.

Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, your organization is holding its annual golf tournament. All of your Board Members register for the event, and you have a query of their records. Using **Globally Add Records**, you can add the registration information to all of their constituent records in one process, without opening each record.

Sponsors for an Event

A sponsor is an individual or organization sponsoring or representing a registrant or a group of registrants for an event. A sponsor can pay all the registration fees, and the registrants can participate in the event as a group.

Note: For more information about events and sponsors, see the *Event Management Data Entry Guide*. Globally adding sponsors to an event is available only if you have Event Management.

On the Global Add screen for Sponsors for an event, select the constituent records you want to include in the global add, the sponsor information you want added to the Participant tab of event records, the event record to which you want this information added, and any reports and queries you want generated.

> **Warning**: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

For example, your organization is holding its annual golf tournament. A representative from Dynamic Engineering called to let you know the company and its three subsidiaries want to sponsor participants in the tournament. Dynamic Engineering and the subsidiaries are constituents in your database. Using **Globally Add Record**s, you can add the sponsorship information to all four records in one simple process instead of opening each record.

Guests for an Event

A guest is an individual or organization attending an event as an invitee (guest) of a registrant.

> **Note**: For more information about events and guests, see the *Event Management Data Entry Guide*. Globally adding guests is available only if you have Event Management.

On the Global Add screen for Guests for an event, select the constituent records you want to include in the global add, the guest information you want added to the Participant tab of event records, the event record to which you want this information added, and any reports and queries you want generated.

Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, your organization is holding its annual golf tournament. Trapman & Associates, a registrant of the tournament, tells you it is bringing its employees as guests. Because Trapman is a matching gift company, its employees are all constituents in your database, and you have a query of all their records. Using **Globally Add Records**, you can add the guest information to all the employee records in one simple process, without opening each record.

Proposals

A proposal is a formal plan detailing how your organization intends to win funds from a prospective donor, how much financial support you expect, where the money will be used, and much more.

Note: For more information about proposal records, see the *Prospect Data Entry Guide*. Globally adding proposals is available only if you have Prospect Research Management.

On the Global Add screen for Proposals, select the constituent records you want to include in the global add, the proposal information you want added to the Prospect tab of the records, and any reports and queries you want generated.
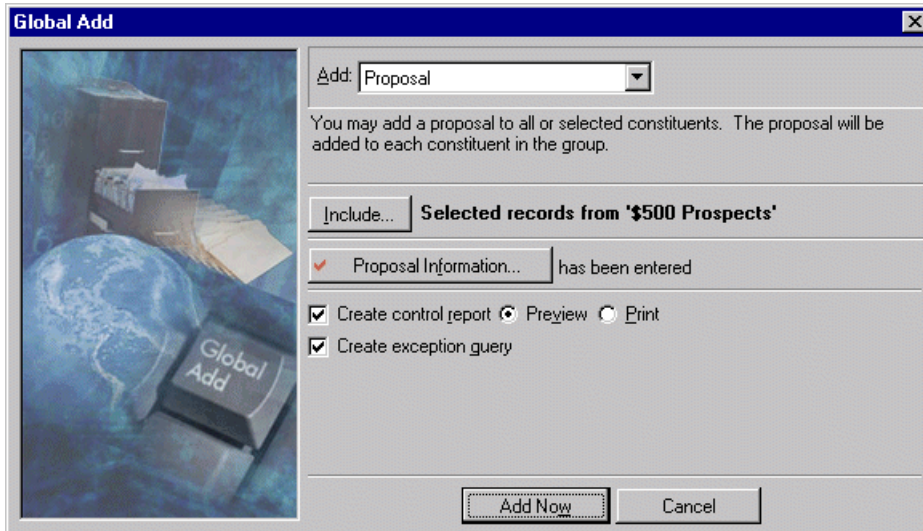
For example, your organization, dedicated to fighting childhood diseases, researched a number of constituents, trying to learn about their giving potential. You found 100 constituents you believe are good prospects to give $500 each to your Annual campaign. You saved the records in a query. Using **Globally Add Records**, you can add a proposal record to each prospect's constituent record in one simple process, without opening each record.

Assigned Solicitors

Warning: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

You can assign a solicitor to a constituent, an individual or organization in your database, to win contributions to your campaigns or funds. When you assign a solicitor to a constituent, you can enter specific information concerning the solicitor's assignment, including the length of the assignment and the solicit amount.

Note: For more information about solicitors, see the Solicitors chapter in the *Constituent Data Entry Guide*.

On the Global Add screen for Assigned Solicitor, select the constituent records you want to include in the global add, the solicitor information you want added to the Relationships tab of the constituent records, and any reports and queries you want to generate.

Note: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, constituent Mohammed Rahman works for Trapman & Associates. Mohammed is also a solicitor for your organization. Because Trapman is a matching gift company, all of its employees have constituent records in your database, and you have a query of the employee records. Using **Globally Add Records**, you can assign Mohammed as the solicitor to all Trapman employees for one year, using one simple process and without opening each record.

Volunteer Awards

Many organizations award volunteers for their loyal commitment and service. On the Volunteer tab of each volunteer's constituent record, you can build a history of service by tracking awards given to the volunteer. Each award you add appears in the **Awards** grid. You can also designate the next award for which the volunteer is tentatively scheduled and enter any comments you have concerning the next award. From **Globally Add Records**, you can add volunteer award information to a number of constituent records all at the same time.

Note: For more information about volunteers, see the *Volunteers & Jobs Data Entry Guide*. Globally adding volunteer awards is available only if you have Volunteer Management.

On the Global Add screen for Volunteer Award, select the constituent records you want to include in the global add, the award information you want added to the Volunteers tab of the records, and any reports and queries you want generated.
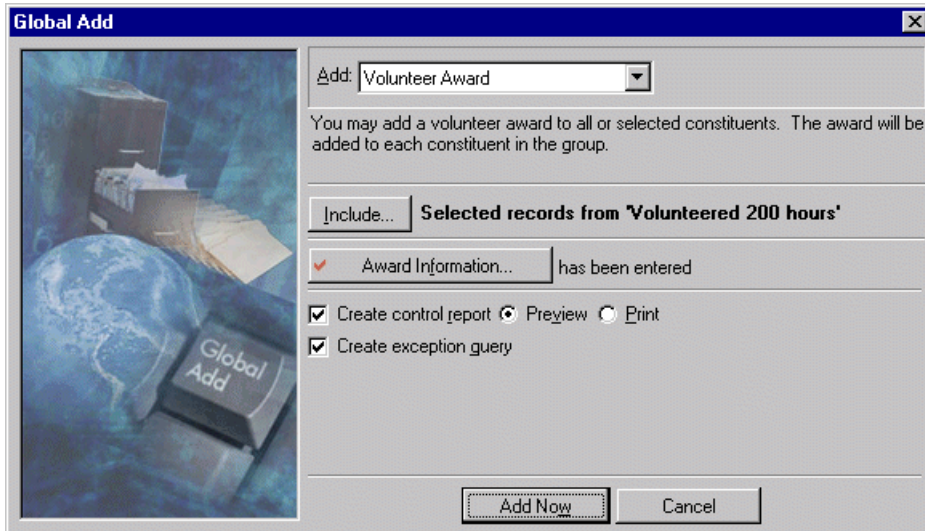
For example, your organization is a hospital. A group of exceptional volunteers each logged 200 hours working at the patient information desk. They received their Volunteer Appreciation awards at the last hospital board meeting. You have a query of their constituent records. Using **Globally Add Records**, you can add the award to these volunteer records in one simple process, without opening each record.

Volunteer Checklist Items

A checklist contains the individual items you require a volunteer to complete before he can start a job. Checklists are important when determining the jobs a volunteer can actually be assigned.

On the Global Add screen for Volunteer Checklist Items, select the constituent records you want to include in the global add, the checklist information you want added to the Volunteers tab of the records, and any reports and queries you want generated.
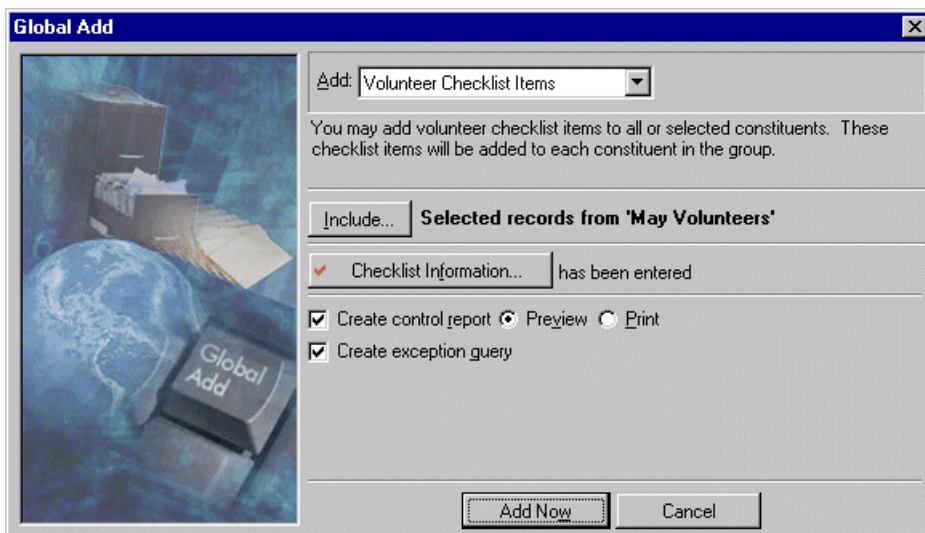
> **Warning**: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

For example, your organization is an aquarium and a new group of volunteers will start in May, volunteering with the Turtle Talks Program. Before a volunteer can start work at the aquarium, he must complete a volunteer orientation, attend the Preserving our Aquatic Environment seminar, and have a TB test. You have a query of the May volunteers' constituent records. Using **Globally Add Records**, you can add this information to all the volunteers' constituent records in one simple process, without opening each record.

Volunteer Time Sheets

> **Note**: For more information about volunteers, see the *Volunteers & Jobs Data Entry Guide*. Globally adding volunteer awards is available only if you have Volunteer Management.

A time sheet summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time. You can globally add a volunteer time sheet to a group of volunteers.

On the Global Add screen for Volunteer Time Sheet, select the constituent records you want to include in the global add, the time sheet information you want added to the Volunteers tab of the records, and any reports and queries you want generated.
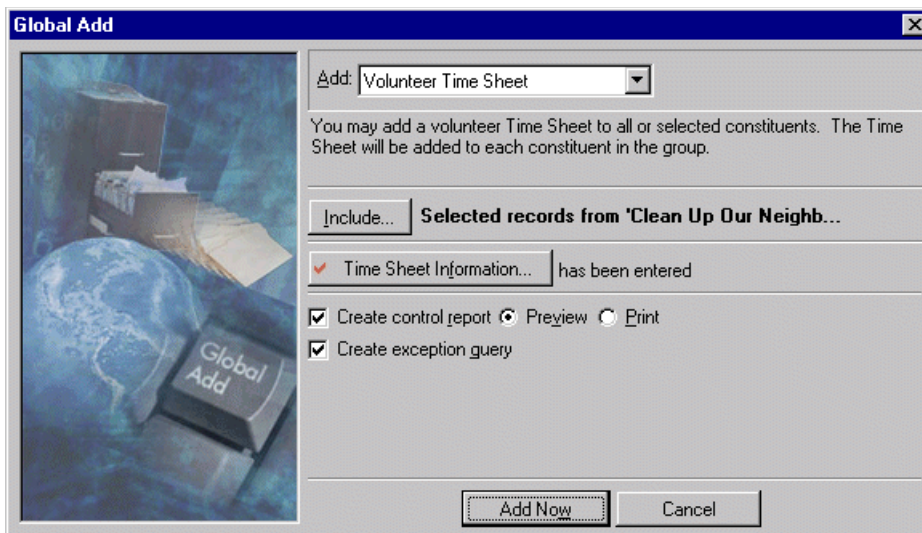
> **Note**: For more information about the Global Add screen, see "Parts of the Global Add Screen" on page 5.

For example, your environmental organization held its annual Clean Up Our Neighborhoods day. Several volunteers with your organization worked all day mowing lawns on a block in their neighborhood. You have all of the volunteers saved in a query. Using **Globally Add Records**, you can add the hours worked to their constituent records in one simple process, without opening each record.

Globally Adding Records Basics

> **Note**: You can globally add new Addressees/Salutations, using **Globally Change Records**. To access **Globally Change Records**, click **Admin** on the Raiser's Edge bar, and click the link. For more information about the global change function, see "Globally Change Records" on page 31.

Accessed through **Admin** on the Raiser's Edge bar, **Globally Add Records** adds information to all or selected records in your database. When you globally add information to records, the records are permanently changed. The only way to retrieve the old record is by restoring you database from a backup.

Also, you can globally add records only if you are assigned the proper security privileges. Security is established in **Security**, accessed through the Administration page. For more information on establishing security rights, see the Security chapter in the *Configuration & Security Guide*.

Query Types

When globally adding information to records, you can select to include all records or selected records. If you choose selected records, you must have a query of the records you to which you want the information added. You create query files in *Query*.

> **Note**: For more information about *Query*, see the *Query & Export Guide*.

Query performs two tasks. First, it segments your database based on criteria you define. Second, it groups records for quick reference and use in other areas of the program, such as **Globally Add Records**.

You must also make sure the query type under which the records are saved is compatible with the record type to which you want to add information. Selecting a specific query type instructs the program to select that particular record type for inclusion in the query. Query types determine the field categories available to include in a query.

The following **Add** options and query types are compatible for use in **Globally Add Records**.

Add Options	Query Type
Action	Constituent, Individual, Organization, Event
Appeal	Constituent, Individual, Organization
Business	Constituent, Individual
Email	Constituent, Individual, Organization
Education/School	Constituent, Individual
Bank/Financial Institution	Constituent, Individual, Organization
Membership	Constituent, Individual, Organization
Notepad	Constituent, Individual, Organization
Constituent Attributes	Constituent, Individual, Organization
Constituent Codes	Constituent, Individual, Organization
Registrants for an Event	Individual, Organization
Sponsors for an Event	Individual, Organization
Guests for an Event	Individual, Organization
Proposal	Constituent, Individual, Organization,
Assigned Solicitor	Constituent, Individual, Organization
Volunteer Award	Constituent, Individual, Organization, Participant
Volunteer Checklist Items	Constituent, Individual, Organization, Participant
Volunteer Time Sheet	Constituent, Individual, Organization, Participant

Globally Adding Information to Records

Warning: If you globally add records while a constituent record is open, an exception is generated and nothing is added to the open record.

On the Global Add screen, depending on the information you select to add, you can select the constituent records you want to include in the global add, send an email message to the selected constituents, enter the information you want added to the records, and select the reports and queries you want generated.

Remember, *The Raiser's Edge* does not check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

▶ **Globally adding information to records**

1. On the Raiser's Edge bar, click **Admin**. The Administration screen appears.

2. Click **Globally Add Records**. The Global Add screen appears.
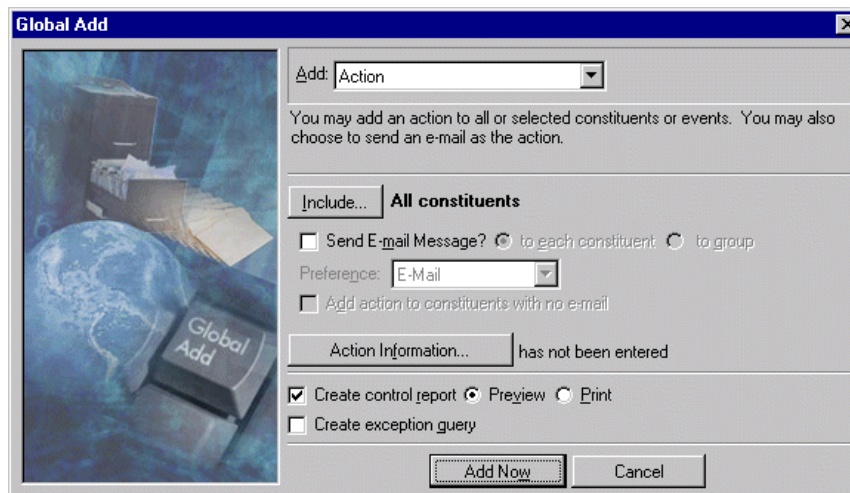
3. In the **Add** field, select the type of information you want to add to your records. For example, if you want to add a phone call action to constituents' action records, select "Action" in the **Add** field; if you want to add a note to constituent records, select "Notepad" in the **Add** field.

4. Use the **Include** button to select records to include in the global add. You can add selected information to all records in your database or use queries to select specific records to which to add information. If you choose selected records, the Open Query screen appears.
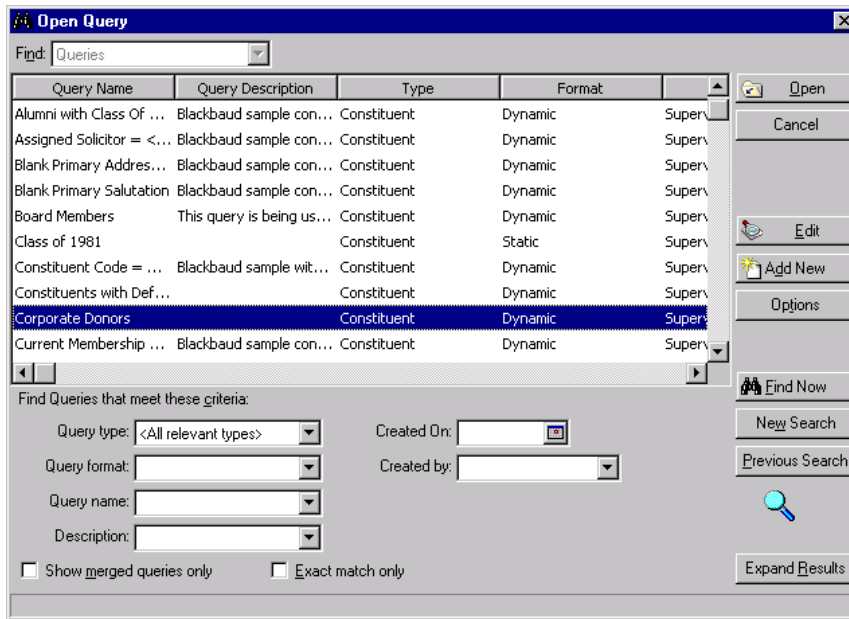
You must select an existing query and click **Open**, or click **Add New** to access *Query* and create a new query.

Note: For more information about queries, see the Query chapter in the *Query & Export Guide*.

Once you select or create a query, you return to the Global Add screen. The query name appears next to the **Include** button.
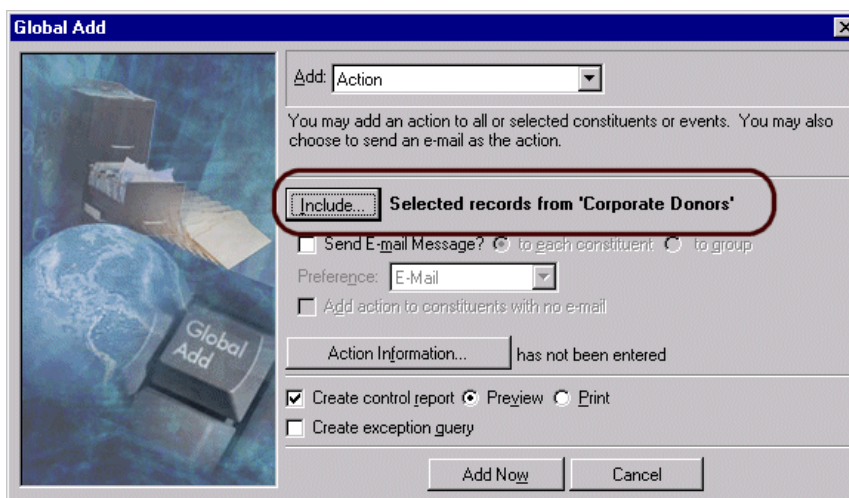
5. If you select Action, Appeal, or Email in the **Add** field, you can compose and send an email message to selected constituents from the Global Add screen. Mark the **Send Email Message?** checkbox. To send an individual message to each constituent, select the **to each constituent** option. If a group email is acceptable, with each constituent's name appearing in the **To** field of the email message screen, select **to group**.

Note: To include constituents who do not have email addresses in an exception query when you run the global add, do not mark **Add action to constituents with no email**. You can use this list of exceptions to easily identify constituents who did not get the email message and notify them some other way.

6. If you send an email message from the Global Add screen, the **Add action to constituents with no email** checkbox appears. To add the action to constituents regardless of whether they have an email address, mark this checkbox.

7. To enter the information you want to add to the selected records, click the **Information** button. The name of the button changes, based on the type of information you are adding to the records. For example, if you add Action information, the button reads **Action Information**; if you add Business information, the button reads **Business Information**.

Also, the screen accessed by clicking the **Information** button changes, based on the type of information you are adding to the records. For example, if you are adding Action information, the New Action screen appears when you click the **Action Information** button.

For information about the screens accessed from the **Information** button, see the following guides.

• New Action screen - see the Actions chapter in the *Constituent Data Entry Guide*

• Appeal screen - see the Appeals chapter of the *Campaigns, Funds, & Appeals Guide*.

• Business screen - see the Constituent Records chapter of the *Constituent Data Entry Guide*

• Education/School screen - see the Education/School Relationships section in the Constituent Records chapter of the *Constituent Data Entry Guide*

• Bank/Financial Institution screen - see the Bank/Financial Relationships section in the Constituent Records chapter of the *Constituent Data Entry Guide*

• Membership screen - see the *Membership Data Entry Guide*

- Notepad screen - see the Notes section in the Constituent Records chapter of the *Constituent Data Entry Guide*
- Constituent Attributes screen - see the Attributes section in the Constituent Records chapter of the *Constituent Data Entry Guide*
- Constituent Codes screen - see the Adding miscellaneous biographical information on the Bio 2 tab procedure in the Constituent Records chapter of the *Constituent Data Entry Guide*
- Registrant screen - see the Adding Participants section in the Event Management chapter of the *Event Management Data Entry Guide*
- Sponsor screen - see the Adding Participants section in the Event Management chapter of the *Event Management Data Entry Guide*
- Guest screen - see the Adding Participants section in the Event Management chapter of the *Event Management Data Entry Guide*
- Proposal screen - see the Proposal section in the Prospect Information chapter of the *Prospect Data Entry Guide*
- Solicitor Assignment screen - see the Solicitors chapter of the *Constituent Data Entry Guide*
- Volunteer Award screen - see the Volunteer Awards section in the Volunteer & Jobs chapter of the *Volunteer & Jobs Data Entry Guide*
- Volunteer Checklist Items screen - see the Checklists on the Volunteer Tab section in the Volunteer & Jobs chapter of the *Volunteer & Jobs Data Entry Guide*
- Volunteer Time Sheet screen - see the Time Sheets on the Volunteer Tab section in the Volunteer & Jobs chapter of the *Volunteer & Jobs Data Entry Guide*

On the Global Add screen, a red check mark appears on the **Information** button, indicating the information has been entered.
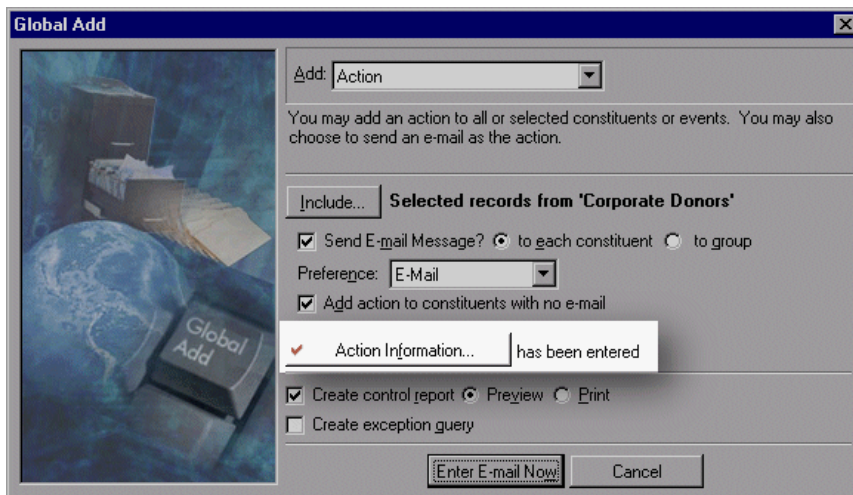
8. If you mark the **Create control report** checkbox, the program generates a report after it runs the global add process. The report includes details about the affected records and a list of any records to which the selected information was not added (exceptions). It also gives reasons for any exceptions. Select the **Preview** option to view the report on your screen. Select the **Print** option to print the control report.

Note: We recommend creating an exception query so you can see which records could not accept the global add.

9. If you mark the **Create exception query** checkbox, the program generates a query of all records that satisfied the global add criteria but were not changed. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports* or to rerun the global add process.

10. If you selected Action, Appeal, or Email in the **Add** field and you are sending an email message, click the **Enter Email Now** button. A message appears, asking if you are sure you want to add the action to the selected records.
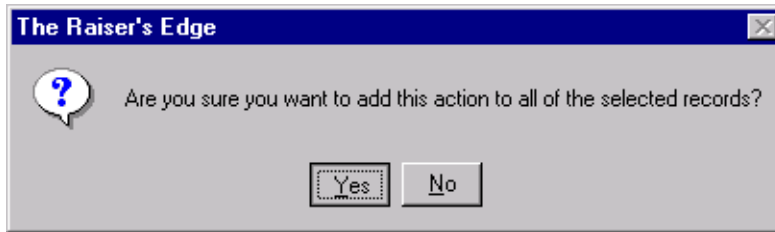
11. Click **Yes** to continue. If you marked **Create exception query**, the Save Static Query screen appears.

12. Enter a **Query name** and **Description**. The Query format defaults to "Static" and cannot be changed.

13. Mark **Other users may execute this query** to allow others to run this query.

14. Mark **Other users may modify this query** to allow others to change the query parameter file.

15. Click **Save**. The Email Message screen appears.

Note: If you are using a 32-bit email program, the screen for sending mail with that program appears. Otherwise, the Email Message screen appears.

16. Enter a **Subject** and compose your message.

17. When you finish entering your message, click **Send Now**. A processing bar appears, tracking the global add procedure. The Global Add Complete! screen appears when the process is complete. This screen displays the Records Processed, information Added, and any Exceptions.

18. Click **Close**. If you marked **Create control report**, the control report appears.
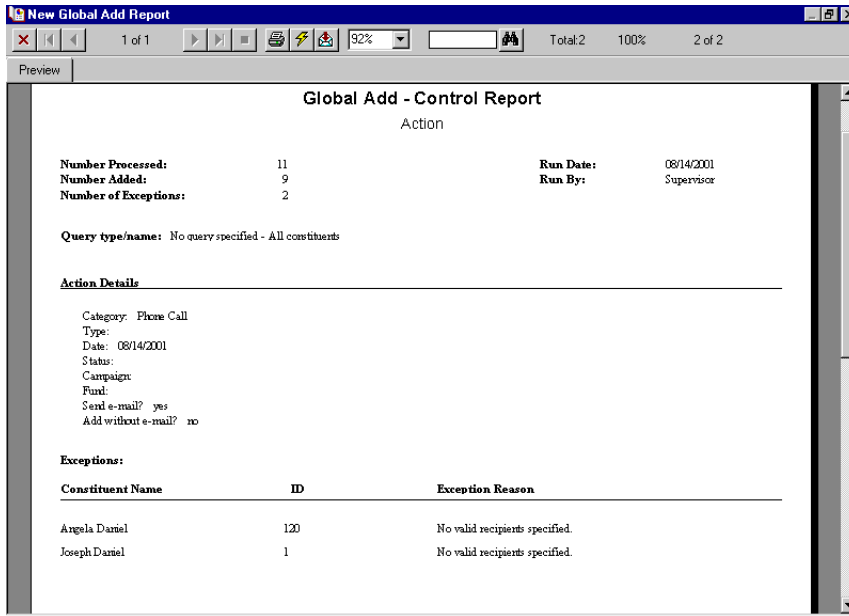
19. From this screen, you can **Print**, **Refresh**, or **Export** the report.
20. To close the report, click the "X" in the upper right corner. You return to the Administration page.

Globally Change Records

The Raiser's Edge 7 makes it easy to change information in a group of records in your database. For example, if your telephone area code changes, you can perform a global change to replace the old area code with the new one in all your records. You can save this information in a global change parameter file and run it again or modify it later. You can make a global change in all records in your database or in a group of records you select.

> **Warning**: Before performing a global change, we strongly recommend you completely back up your database. To successfully back up your data, you must first shut down the database.

Because global changes are based on record types, changes must be made one record type at a time. For example, you must change the area codes in constituent records, event records, and action records as three separate global changes.

To record your change process, you can generate a control report. The report includes details about the changed records and a list of any records not changed (exceptions). It also gives reasons for each exception. If you create a query of records included in the global change, you can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*. An exception query contains the records not changed by the global change process.

In **Globally Change Records**, you can perform a number of different operations: add, delete, copy, move, swap, replace, partially replace, increase, or decrease values in a field you select. In addition, you can change an attribute record, an assigned solicitor, a soft credit recipient, primary alumni information, and preferred addresses.

Each global change procedure is based on a record type. You can globally change fields in any of the following record types: constituent, event, membership, fund, campaign, appeal, gift, action, and job. Many of the record types have subcategories. For example, a Constituent record type includes the following subcategories: Organization/Business Relationship, Proposal, Individual, Organization, and Individual/Contact/Employee Relationship. The record type and subcategory you select determine the fields available to change. For example, if you select Constituent records, all fields included on the constituent record, such as fields related to addressees/salutations, biographical, and address information, are available for the global change process. If you select Proposal constituent records, only fields specific to the constituent proposal record, such as **Amount Asked**, **Amount Funded**, and **Deadline**, are available for the global change process.

Navigating in Globally Change Records

The Globally Change Records page contains the commands necessary to complete all global change functions. You can use a variety of parameters to define a global change process. To access the function, click the **Globally Change Records** link on the Administration page.
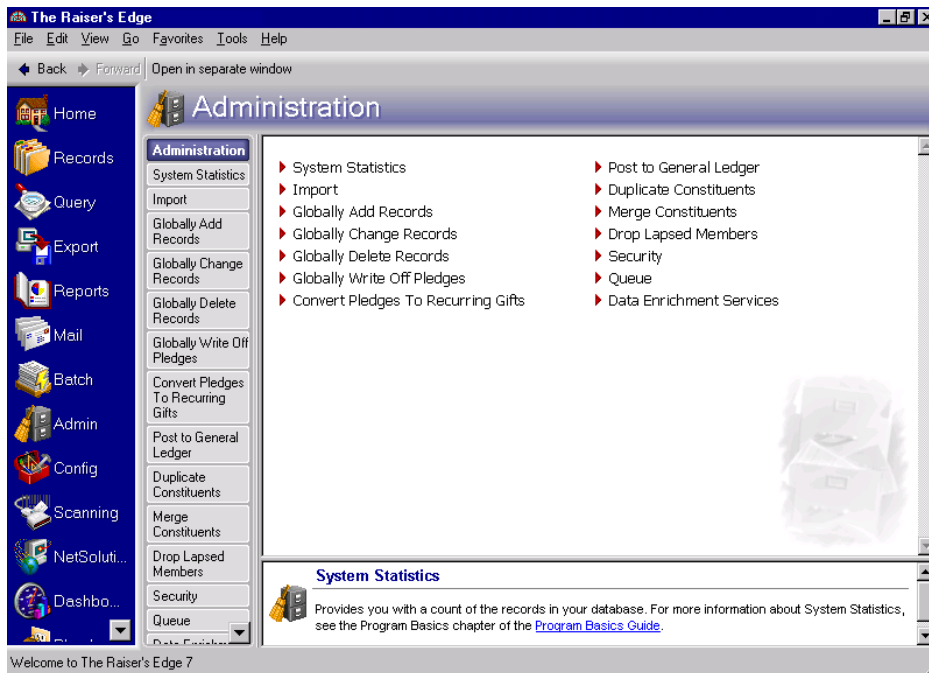
The Globally Change Records page appears.
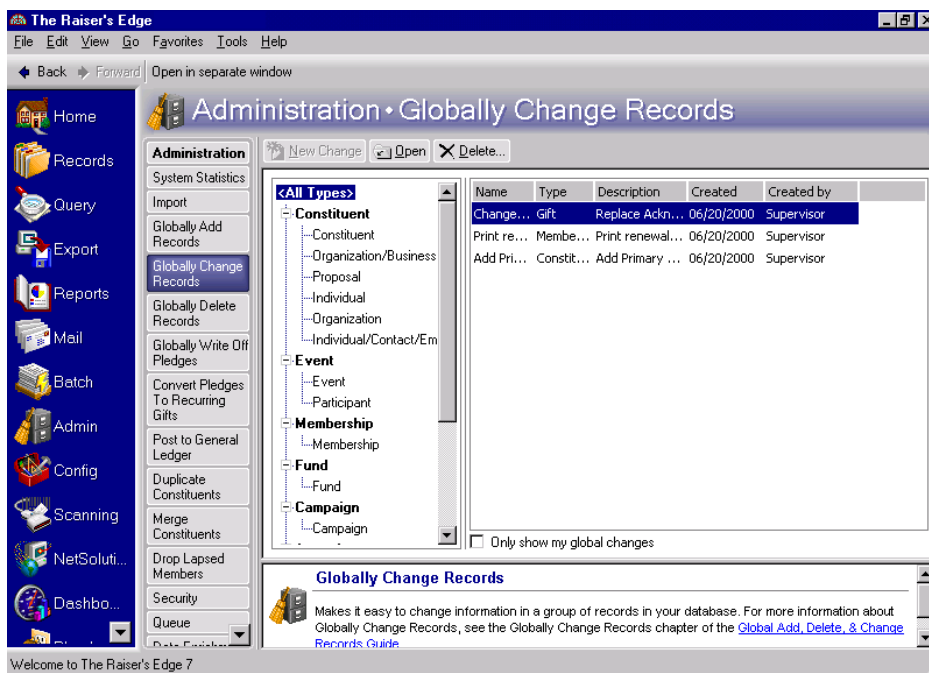
The fields available for a global change procedure vary, depending on the record type in which you want to change information.

Note: Not all fields from all records types are available.

For example, if you want to change campaign attributes, you must select the **Campaign** category in the tree view on the Globally Change Records page. All campaign record fields available for the global change appear in the **Available Fields** box, including campaign attributes. Campaign attributes are not available in any other record type. So, for example, if you select the **Constituent** category in the tree view on the Globally Change Records screen, campaign attributes do not appear in the **Available Fields** box. They are not part of the constituent record.

▶ **Opening Globally Change Records**

1. On the Raiser's Edge bar, click **Admin.** The Administration page appears.

2. On the Administration page, click **Globally Change Records**. The Globally Change Records page appears.
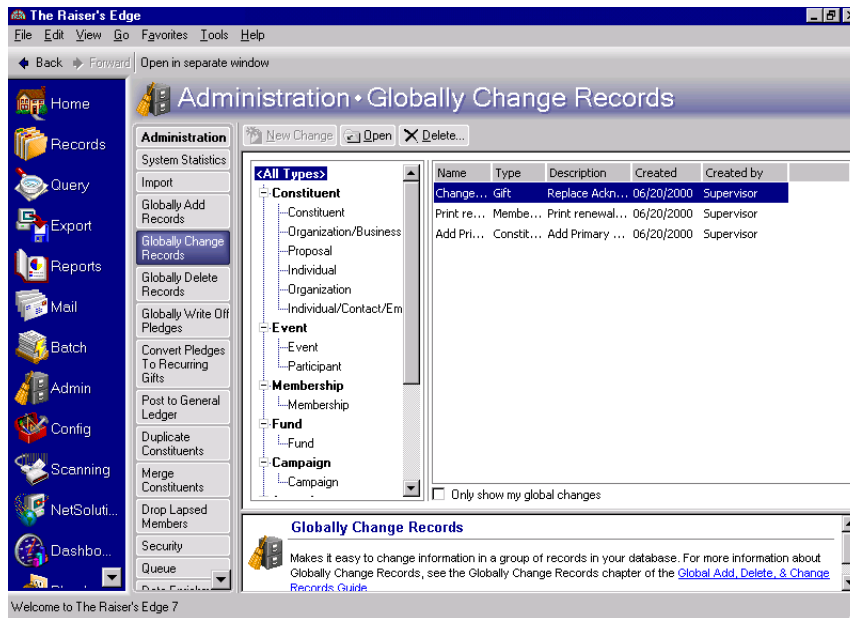
The tree view on the left of the page shows the types of records you can change. You can make global changes to constituent, event, membership, fund, campaign, appeal, gift, action, and job records. For more information about the global change process, see "Globally Changing Records" on page 46.

Note: You can globally change event information only if you have Event Management, membership information only if you have Membership Management, and job information only if you have Volunteer Management.

Saved global change parameter files appear in the grid on the right of the page. The grid provides the name of the file, the file type, a short description, the date on which it was created, and who created the file.

Above the tree view are the **New Change**, **Open**, and **Delete** links for globally changing records. Click these buttons to create a new global change, open a saved global change, or delete a saved global change.

3. Select a record type in the tree view on the left side of the screen and click **New Change**, the Global Change screen for the selected record type appears.
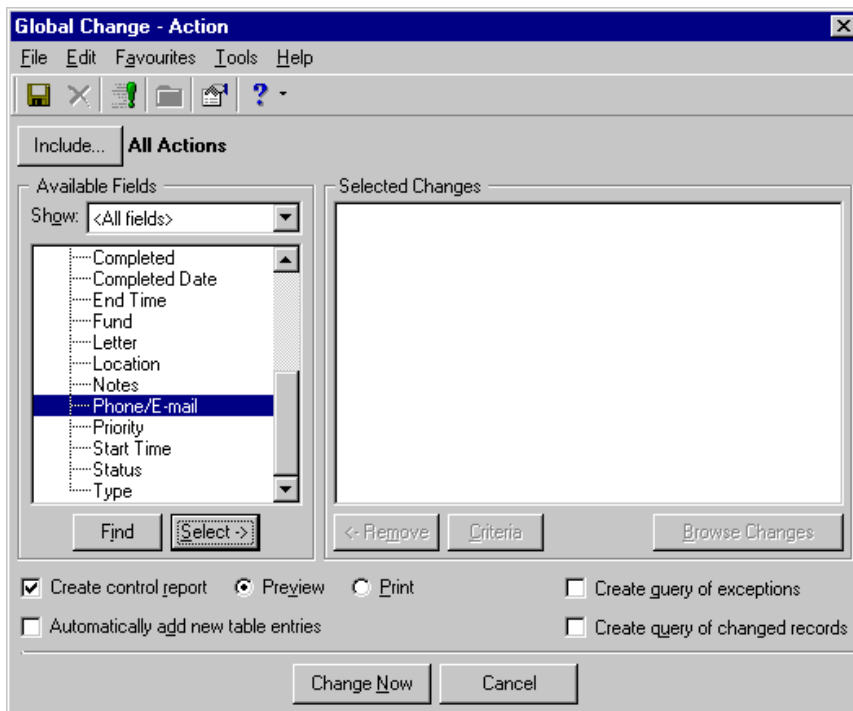
For detailed information about the components of the Global Change screen, see "Parts of the Global Change Screen" on page 37.

4. After you globally change information and save and name the global change parameters, select **File**, **Close** from the menu bar on the Global Change screen. You return to the Globally Change Records page, and the new global change parameter file appears in the grid on the right side of the screen.

Toolbar for Globally Change Records

Note: You can set up a user option enabling you to view tool tips as you hold your cursor (hover) over each item in the toolbar. Tool tips explain the function of each command. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

A toolbar is a row of buttons representing commands or functions in **Globally Change Records**. To save time, you can use these buttons as alternatives to menu commands.

Save the current global change parameter file

Delete the selected global change parameter file

Run the selected global change

Add this global change parameter file to your Favorites list

View properties for a selected global change

Access help topics

Business Rules

Established in *Configuration*, business rules improve data entry speed and help to verify that data is correct.

Note: For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

With business rules, you can perform common tasks in two categories: those with predefined rules and those with rules that you define. Predefined rules are for the most part set up by marking a series of checkboxes and options. They govern a wide variety of functions, such as rules for adding gifts and what constitutes duplicate criteria during searches.

User Options

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

User options are preferences you set that affect how **The Raiser's Edge** looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of **The Raiser's Edge**. The Options screen appears so you can establish certain user options for **Globally Change Records**.

Parts of the Global Change Screen

The Global Change screen is essentially the same, regardless of the record type you select.
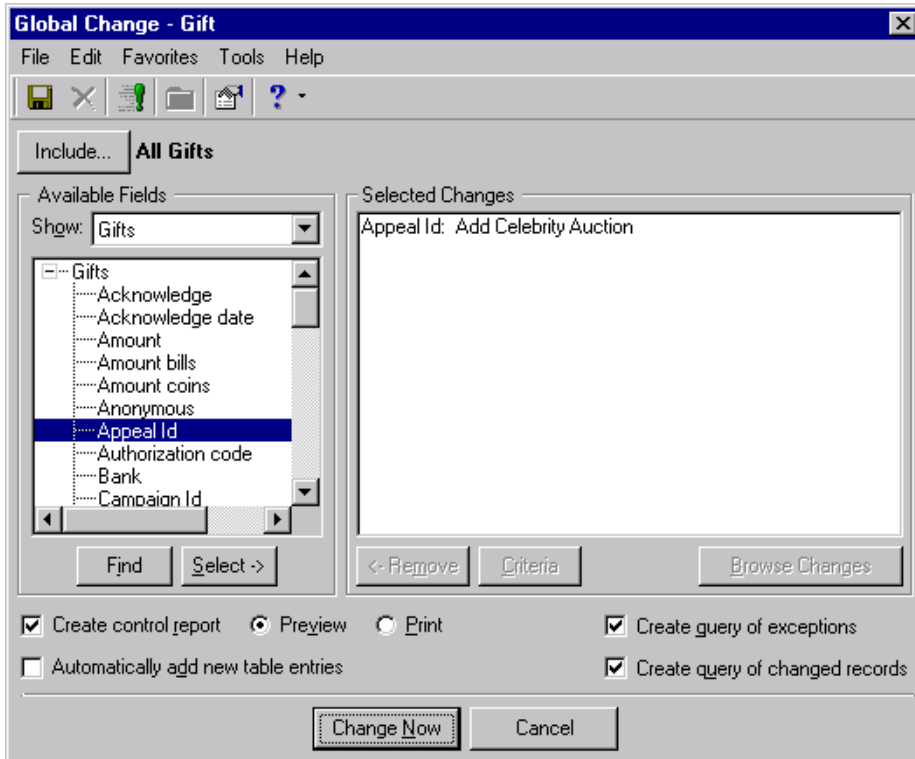
Only the list of **Available Fields** changes, based on the record type and subcategory you select on the Globally Change Records page. All other fields, buttons, options, and checkboxes appear for all record types and subcategories.

In the **Available Fields** box, you select the fields and parts of the record you want to change. For example, if you want to add the **Appeal Id** "Celebrity Auction" to all gift records, select **Appeal Id** in the **Available Fields** box and click **Select**. The Edit Change Parameters screen appears, from which you can search for the appeal. For more information, see "Edit Change Parameters Screen" on page 41.

In the **Show** field, you can narrow the list of available fields by selecting a specific type of field.
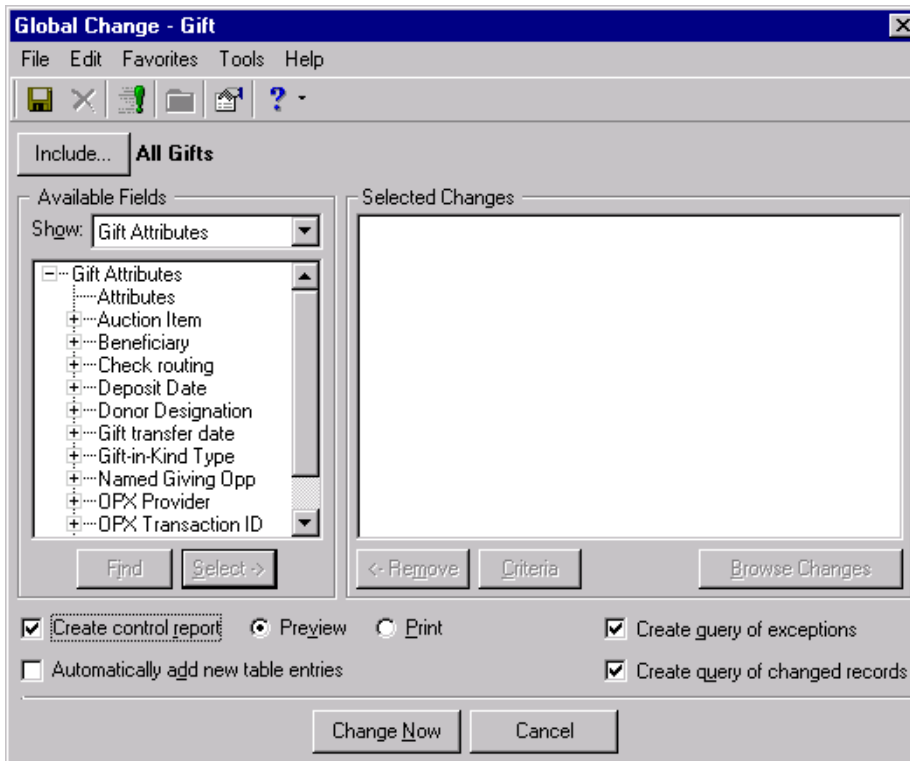
For example, if you are globally changing gift records, in the **Show** field, you can select "Gift Attributes", and only fields related to gift attributes appear. Select "<All fields>" to display all fields related to all gift records.

If you mark **Create control report**, the program generates a report after it runs the global change process. The report includes details about the changed records and a list of any records not changed (exceptions). It also gives reasons for each exception.

If you mark **Automatically add new table entries**, the program automatically creates new table entries for fields changed that do not already have the table entry entered as an option. For example, you run the **Globally Change Records** process, and you want to replace the **Industry** category entry "Arts" with "Arts and Music", but "Arts and Music" does not exist as a table entry for **Industry** in **Tables**. If you have security rights, you can mark the **Automatically add table entries** checkbox, and **Globally Change Records** adds "Arts and Music" as a table entry for **Industry** at the same time the change records process runs. For more information about tables, see the Configuration chapter of the *Configuration & Security Guide*.

If you mark **Create query of exceptions**, the program generates a query of all records that satisfied the global change criteria but could not be changed. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*, or to run the global change process again.

If you mark **Create query of changed records**, the program generates a query of all records changed in the global change process. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*.

Also common to all Global Change screens are the buttons, which help you select the information you need to run the global change process.

Include. Use the **Include** button to select records to include in the global change. You can change all records in your database or use queries to select specific records to change. If you choose to change selected records, the Open Query screen appears. You must select an existing query and click **Open** or click **Add New** to access *Query* and create a new query.

Note: For more information about creating a query, see the *Query & Export Guide*.

Find. Use the **Find** button to search subcategories in the **Available Fields** box. The Find screen appears.
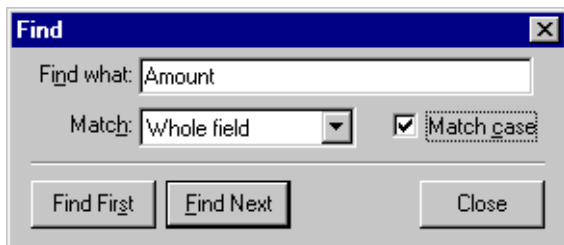
For example, if you want to find the **Amount** field in a Gift record global change, enter "Amount" in the **Find what** field. In the **Match** field you can specify that you want the "Whole field" name to match, "Any part of the field" name to match, or the "Start of field" name to match. Mark **Match case** to make your search case-sensitive.

Select. Use the **Select** button to move a highlighted field from the **Available Fields** box into the **Selected Changes** box. When you click the button, the Edit Change Parameters screen appears, so you can select the operation you want to perform. For example, if you highlight **Appeal ID** in the **Available Fields** box, the Edit Change Parameter screen appears, allowing you to select to "Add", "Replace", or "Delete" the **Appeal ID**. For more information about the Edit Change Parameters screen, see "Edit Change Parameters Screen" on page 41.

Remove. Use the **Remove** button to remove selected fields from the **Selected Changes** box.

Criteria. Use the **Criteria** button to quickly return to the Edit Change Parameters screen after you select the fields you want to change.
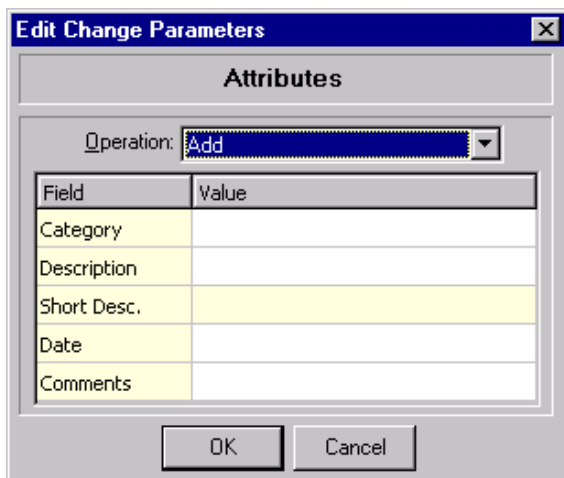
In the **Selected Changes** box, select the entry for which you want to view the change criteria. Click **Criteria** and the Edit Change Parameters screen appears. For more information about this screen, see "Edit Change Parameters Screen" on page 41.

Browse Changes. The **Browse Changes** button is activated only if you are copying, moving, swapping, replacing, or partially replacing a field. With it, you can preview how a specific field change affects the selected records before you actually run the global change. To activate the button, select a field entry in the **Selected Changes** box. Click **Browse Changes**. A screen appears showing the records and how the change parameters affect them.
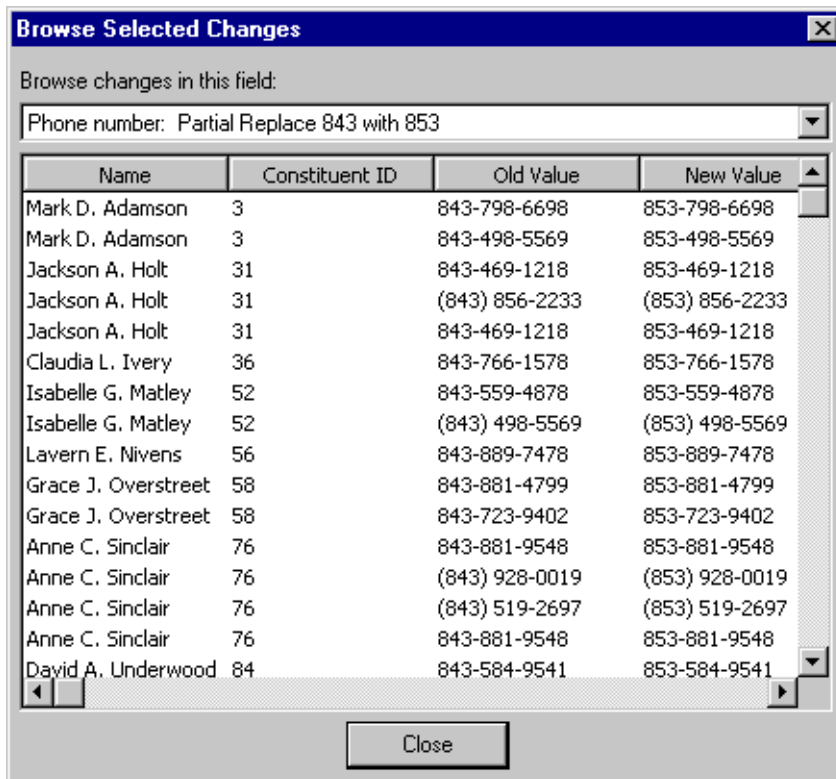
Change Now. Use the **Change Now** button to process the global change. When you click **Change Now**, the Save Global Change As screen appears, and you can name and describe the parameter file.

Cancel. Use the **Cancel** button to stop processing the global change. Be aware that any records already changed cannot be undone. When you click **Cancel**, a warning screen appears, asking if you are sure you want to cancel the global change.
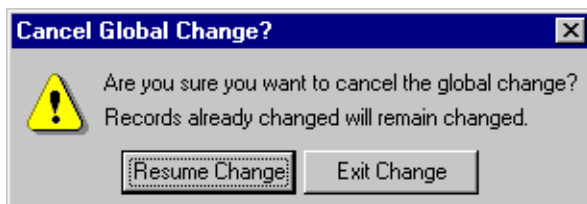
To continue, click **Resume Change**. To stop the global change process, click **Exit Change**. You return to the Global Change screen.

Edit Change Parameters Screen

The Edit Change Parameters screen appears when you select a field in the **Available Fields** box of the Global Change screen. For example, when you select **Fiscal Year Starts** from the **Available Fields** box on the Global Change - Constituents screen, the following screen appears.

The screen contains an **Operation** field, where you select to add, replace, partially replace, delete, increase, decrease, copy, move, or swap information in the field. Not all **Operation** selections are available for every type of change.

Your selection in the **Operation** field determines which additional fields and checkboxes appear on the screen. For example, if you select "Partial Replace" in the **Operation** field, the **Partially replace** field appears, allowing you to enter what you want to partially replace. In the **With** field, enter what you want to replace the information you entered in the **Partially replace** field with.

Common Checkboxes on the Edit Change Parameters Screen

The Edit Change Parameters screen includes three checkboxes common to several global change operations.

• Mark the **Match case** checkbox to make the change process case-sensitive (for example, to search only for "South" and not "south").

• Mark the **Use pattern matching** checkbox to use wildcard characters such as * and ? in strings of information to be changed.

  You can use the question mark symbol to replace a character. By typing a question mark within a word, you are asking the program to search for every possible spelling of the word with the question mark in that specific spot. More than one question mark is allowed within a word. For example, if you want to locate any constituent with a last name such as Smith or Smyth you can use the criteria **Last Name** "like" Sm?th. The program selects all constituents whose last name fits the pattern you described.

  You can use the asterisk to replace a series of characters. For example, to locate all constituents with a last name ending with the letters "son", you can enter the criteria **Last Name** "like" *son. The program selects all constituents whose last name ends in son (for example, Simpson, Henderson, or Michaelson).

• Mark the **Find whole words only** checkbox, and the program searches for whole words only when searching for text to change

Add

Note: You cannot copy, swap, or move fields that represent more than one value. For example, on a group of constituent records, you cannot globally change "Address line 1" under "All addresses" using copy, swap, or move because it represents address line 1 for all non-preferred addresses, not one specific address.

The Add global change function adds value to fields. This value can either replace the current value or make no changes to the current data, depending on whether you check the **Overwrite existing value** checkbox on the Edit Change Parameters screen.

• If you leave the **Overwrite existing value** checkbox unmarked, only empty fields receive the new value. Non-empty fields are not modified.

• If you mark the **Overwrite existing value** checkbox, the program overwrites the values existing in the field. The new value is added to empty fields and replaces the existing values.

For example, you are making a global change to add "Ms." as a title. If you leave the **Overwrite existing value** checkbox unmarked, "Ms." is added only to records with no title defined. Records with "Mrs.", "Dr.", or any other value remain unchanged.

If you mark the **Overwrite existing value** checkbox, the program replaces all titles with "Ms.", regardless of what the title was originally.

Some fields in *The Raiser's Edge*, however, have multiple values. They are generally fields included in a grid, allowing for multiple rows of data. **Volunteer Type** and **Phone number**, for example. For these type of fields, the data-replacement rule is as follows:

• If you leave the **Overwrite existing value** checkbox unchecked, the new value is not written to any of the many-to-one types of fields.

• If you mark the **Overwrite existing value** checkbox, then the specified value overwrites ALL existing values in the designated fields. Blank fields remain blank.

Replace

The Replace global change function is available only for fields that use code tables (have predefined values). For more information about code tables, see the Configuration chapter of the *Configuration & Security Guide*. The Replace function searches for records that exactly match the value (Partial Replace searches for values that contain the value.). You cannot leave the **Replace** field blank for the replace function.

For example, to replace the value in the **State** field from "GA" to "SC", in the **Replace** field, enter "GA". In the **With** field, enter "SC". The program changes the state to SC in these records.

Partial Replace

Note: The Partial Replace function is not available for code table fields. For more information about code tables, see the Configuration chapter of the *Configuration & Security Guide*.

The Partial Replace global change function searches for records containing the selected value. (Replace searches for records exactly matching the value.) You cannot leave the **Replace** field blank for the partial replace function. To make the search case sensitive (for example, to search only for "South" and not "south"), mark the **Match case** checkbox.

For example, you can use the Partial Replace global change function to change area codes for records in a query. Because the entire phone number, including area code, is part of a field, you can replace part of the phone number (the area code for first three digits) with a new value. You can partially replace 803 with 843. Any records in the query with a phone number starting with 803 have those numbers replaced with 843. The remainder of the phone numbers in the query remain unchanged.

Delete

The Delete global change function deletes any value in the selected fields containing the value you specify in the **Delete** field.

For example, your organization no longer requires a minimum age of 16 for selected jobs in your database. You can delete the age requirement by entering "16" in the **Delete** field.

Increase/Decrease

The Increase or Decrease global change function increases/decreases values in fields containing a numeric value by an exact amount or percentage. When increasing/decreasing values by a percentage, you specify the number of decimal places to which the final value should be rounded. For fields containing a date value, you increase/decrease the date by a specified number of days, weeks, months, or years. Increases and decreases take into account different length months and leap years.

For example, increasing by one day replaces 07/06/2004 with 07/07/2004, or 07/31/2004 with 08/01/2004. Decreasing by one week replaces 07/08/2004 with 07/01/2004, or 06/02/2004 with 05/26/2004. Increasing by one month replaces 07/13/2004 with 08/13/2004, or 01/30/2004 with 02/29/2004 (the last day of the next month).

Copy

The Copy global change function places the entire value of the source field into a compatible target field. In the **Copy to** field, click the binoculars to select the target field.

The value in the target field either makes no changes to the current data or replaces the current value, depending on whether you mark the **Overwrite existing value** checkbox.

- If you leave the **Overwrite existing value** checkbox unmarked, only empty fields receive the new value. Non-empty fields are not modified.

- If you mark the **Overwrite existing value** checkbox, the program overwrites existing values. The new value is moved into empty fields, and it replaces values in fields with existing values.

Swap

The Swap global change function places the entire value from the source field into the target field, and the original value of the target field into the source field. In the **Swap with** field, click the binoculars to select the target field.

Move

The Move global change function places the entire value of the source field into the target field. Move also deletes the value from the source field. In the **Move to** field, click the binoculars to select the target field.

The value in the target field either makes no changes to the current data or replaces the current value, depending on whether you mark the **Overwrite existing value** checkbox.

- If you leave the **Overwrite existing value** checkbox unmarked, only empty fields receive the new value. Non-empty fields remain unchanged.

- If you mark the **Overwrite existing value** checkbox, the program overwrites existing values. The new value is moved into empty fields, and the new value replaces existing values in fields with values.

Record Types You can Globally Change

Globally Change Records helps you maintain your *Raiser's Edge* records. You can update information in constituent, event, membership, fund, campaign, appeal, gift, action, and job records. Each record type appears as a category on the Globally Change Records page. The larger record types, such as Constituent, include subcategories, allowing you to make changes to specific constituent record types: Constituent, Organization/Business Relationship, Proposal, Individual, Organization, or Individual/Contact/Employee Relationship. The categories determine the fields available for the global change procedure. For example, if you want to globally change Address Attributes, you need the Constituent category, if you want to change participant Shirt Size options, you need the Participant subcategory available under Event.

Constituents

Constituents are individuals or businesses who support your organization by contributing time, money, and resources. You can make global changes to constituent records in your database. For example, if a bank changes its name or is acquired by another bank, use **Globally Change Records** to change the bank name in one process instead of making the change to each constituent record individually.

You can create a constituent global change parameter file for the following categories: Constituent, Organization/Business Relationship, Proposal, Individual, Organization, Individual/Contact/Employee Relationship. The list in the **Available Fields** box changes based on the category you select. For example, if you want to change a part of the constituent record — Addressee/Salutations, Aliases, Address Addresses — select the Constituent category; if you want to change part of a Proposal record — proposal attributes or fields such as Amount Asked or Ratings — select the Proposal category.

Events

Events are occasions such as golf tournaments, banquets, or dances you use to raise funds. You can make global changes to event records only if you have Event Management. For example, due to building renovation, you need to book a different auditorium for several events. Use **Globally Change Records** to change the location in the event records in one process instead of making the change to each event record individually.

You can create an event global change parameter file for the following categories: Event and Participant. The list in the **Available Fields** box changes based on the category you select. For example, if you want to change a part of the event record — Event Attributes or fields such as Capacity or Goal — select the Event category; if you want to change part of a participant record — Participant Attributes or fields such as Solicitor or Status — select the Participant category.

Memberships

Membership records help you track multiple memberships and programs; produce reports to analyze membership activity; print lists and directories of members; link gift records to membership records; and perform specific mailing tasks, such as preparing membership cards and renewal notices. You can globally change information on membership records only if you have Membership Management. For example, to extend the expiration date of your student memberships, use **Globally Change Records** to change the expiration date in one process instead of making the change to each membership record individually.

Funds

Funds are the specific financial purpose of gifts given to your organization. For example, your organization can have a Building Fund, Acquisition Fund, or General Operating Fund. Funds identify the financial accounts in which gifts and pledges should be recorded. You can globally change information in fund records in your database. For example, to change the end date for all funds having outstanding expenses, use **Globally Change Records** to change the date in one process instead of making the change to each fund record individually.

Campaigns

Campaigns are your overall objectives for raising money. For example, you can have a New Building Campaign, an Endowment Campaign, or an Annual Giving Campaign. You can set up a campaign to include information, such as goals and start and end dates; and use this information to create summaries and reports to analyze the progress and success of the campaign. You can also identify the funds and appeals which make up the campaign. You can globally change information in campaign records. For example, to change the end date for all campaigns having outstanding expenses, use **Globally Change Records** to change the date in one process instead of making the change to each campaign record individually.

Appeals

Appeals are the solicitations that bring in gifts to your organization.You can set up appeals such as direct mailings, phonathons, exhibits, and newsletters to track the number of constituents you solicit for each appeal. You can also define a default benefit given to those who donate to an appeal (such as a coffee mug, t-shirt, or newsletter subscription) and how much each benefit costs your organization. You can globally change information in appeal records. For example, to change the end date for all appeals having outstanding expenses, use **Globally Change Records** to change the date in one process instead of making the change to each appeal record individually.

Gifts

> **Note**: To remove regular supporters who have missed payments consecutively from future mailings, transaction files, etc., you can create a query using the **Number of Consecutive Missed Payments** field. Then you can use this query to globally change the appropriate recurring gift records' status to Terminated.

A gift record contains detailed information about a donation given to your organization by a specific constituent. This information includes the gift date, amount, and type; the solicitor responsible for obtaining the gift; and the campaign, fund, and appeal. Gift records are designed to store all information relating to a single gift in one place. Each gift donated to your organization has a separate gift record. You can globally change information in gift records. For example, to replace the appeal on a group of gifts, use **Globally Change Records** to change the appeal in one process instead of making the change to each gift record individually.

Actions

Actions are the specific steps you take toward securing a donation from a constituent. They may include meetings, mailings, telephone calls, and email messages. Actions allow you to build a history of the contacts and communications involved in creating a successful relationship with a constituent. In addition to tracking meetings, phone calls, and mailings, *The Raiser's Edge* can automatically remind you days, weeks, or months before an action is scheduled to occur. You can globally change information in a group of action records. For example, to change the location of a meeting with a group of your organization's volunteers, use **Globally Change Records** to change the meeting place in one process instead of making the change to each separate record.

Jobs

Jobs are tasks or miscellaneous pieces of work assigned to volunteers in your organization. From a job record, you can enter a category and position for the job, the start and end dates, whether or not you allow mandated volunteers to be assigned to the job, and you can mark the job as completed when it is finished. You can enter the type of volunteer needed for the job, a complete job description, and the minimum age your volunteers must be before they can be assigned to the job. If the job is for a particular organization or event, you can link the job to that organization or event record. You can globally change information in job records only if you have Volunteer Management. For example, you may want to raise, lower, or eliminate the minimum age for volunteers who perform certain jobs. To change the age in your database, use **Globally Change Records** to change to change the minimum age in one process instead of making the change to each job record individually.

Globally Changing Records

Warning: Before performing a global change, we strongly recommend you completely back up your database. To successfully back up your data, you must first shut down the database.

You can use the global change process in *The Raiser's Edge* to change a wide variety of record types in your database without accessing each record individually. For example, instead of using valuable hours to change the name of a bank in your records one at a time, you can change the bank name with just one process. You simply open **Globally Change Records**, complete the Global Change screen, and click one button to change the bank name on all or selected records.

Understanding the different record types is essential to using **Globally Change Records** properly. Selecting a specific record type instructs the program to use that particular record type for inclusion in the global change. Record types determine the field categories available for a global change.

Warning: The program locates an addressee/salutation to be replaced based on its formula. Therefore any other addressee/salutation with the same formula is also replaced in a global change.

Be careful when globally changing addressees/salutations on your records. Only addressees/salutations that are non-editable can be globally changed. An addressee/salutation to be replaced is located by the program based on its formula. Therefore, if more than one addressee/salutation is based on the same formula, they are all replaced with the new formula. For more information on creating addressees/salutations, see the Configuration chapter of the *Configuration & Security Guide*.

Globally changing event records is available only if you have Event Management; globally changing job records is available only if you have Volunteer Management; globally changing membership records is available only if you have Membership Management; and globally changing proposal records is available only if you have Prospect Research Management.

▶ **Globally changing records**

1. On the Raiser's Edge bar, click **Admin.** The Administration page appears.

2. Click **Globally Change Records**. The Globally Change Records page appears.
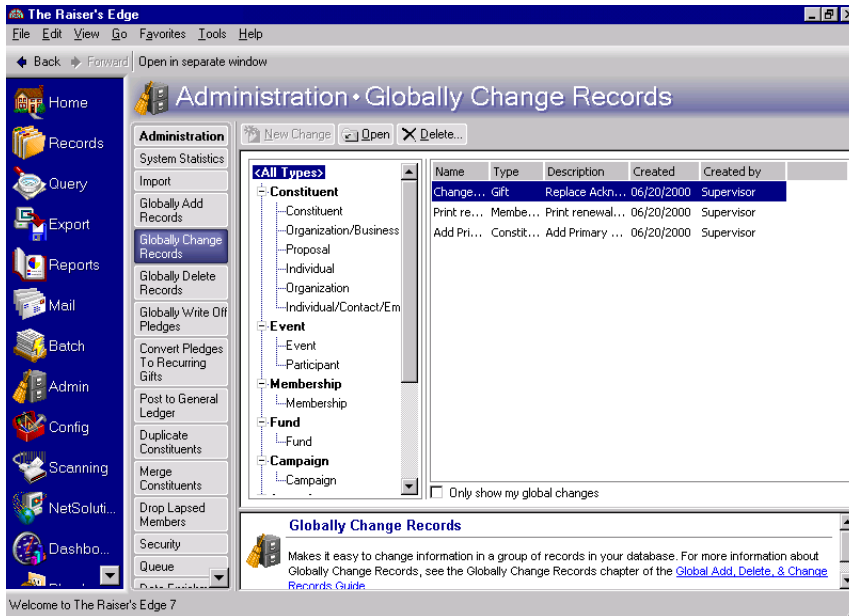
3. From the tree view on the left, click the plus sign beside the record category you want to change, and select a type of record. For example, in the Event category, you can select to globally change "Event" or "Participant" record information. In the Constituent category, you can select to globally change "Constituent", "Organization/Business Relationship", "Proposal", "Individual", "Organization", or "Individual/Contact/Employee Relationship" record information. The fields available for you to change are based on the record type you select.

Note: For more information about the Global Change screen, see"Parts of the Global Change Screen" on page 37.

4. On the action bar, click **New Change**. The Global Change screen appears.
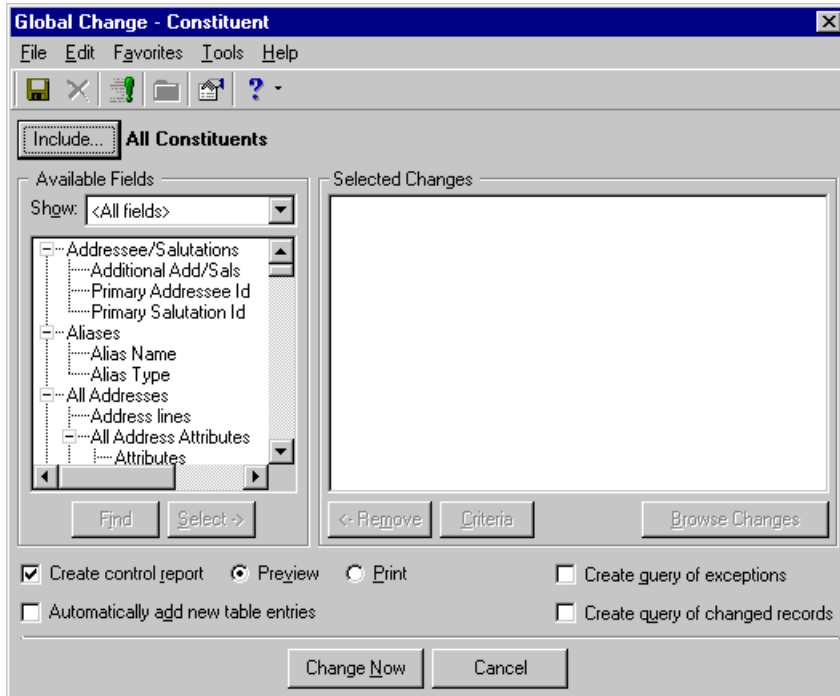
The Global Change screen includes the same checkboxes and options, regardless of the record type you select to change. Only the fields included in the **Available Fields** box change based on the record type you select.

Note: To remove regular supporters who have missed payments consecutively from future mailings, transaction files, etc., you can create a query using the **Number of Consecutive Missed Payments** field. Then you can use this query to globally change the appropriate recurring gift records' status to Terminated.

5. To select the records from your database that you want to include in the global change, click **Include**. You can include "All" or "Selected" records.

If you choose "All", every record in your *Raiser's Edge* database is changed.

If you choose "Selected" records, the Open Query screen appears, displaying a blank grid. In the **Find Queries that meet these criteria** frame, you can enter information limiting your query search. Or, to locate all relevant queries, leave the criteria fields blank.

6. Click **Find Now**. All existing queries satisfying the criteria you entered appear in the grid.
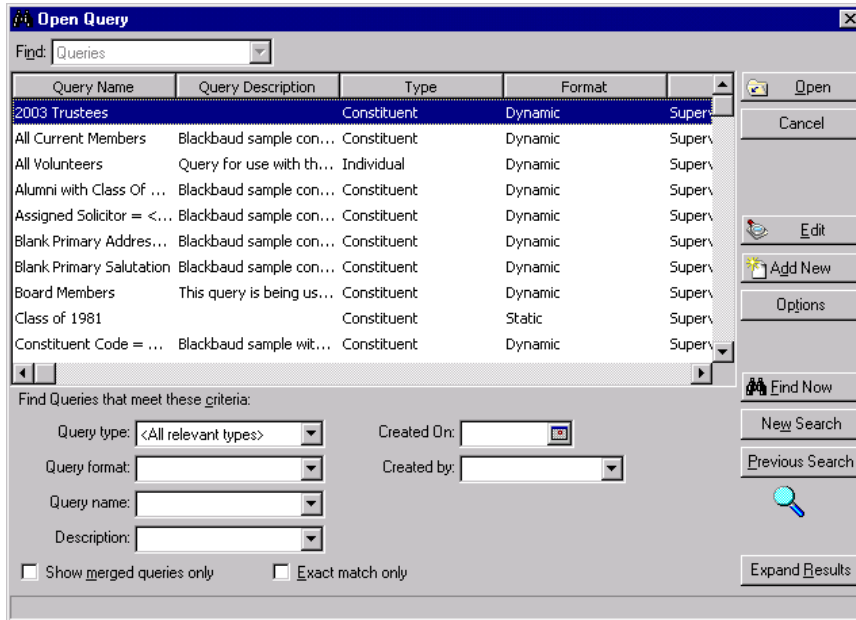
Select the query you want to work with, and click **Open** to return to the Global Change screen. The query name appears next to the **Include** button.

If the query does not exist, click **Add New** to create a query.

Note: For more information about creating a query, see the *Query & Export Guide*.

7. On the Global Change screen, in the **Show** field, you can select the category for the field (or other part of the record) you want to change. For example, if you want to change "Title" information on constituent records, you can select "Biographical" in the **Show** field to narrow the options available in the field list; if you want to change "Tribute Type" information, you can select "Tributes" in the **Show** field to narrow the options available in the field list.

8. From the list in the **Available Fields** box, highlight the field (or other part of the record) you want to globally change, and click **Select**. The Edit Change Parameters screen appears.

Note: For information about the different options available on all Edit Change Parameters screens, see "Edit Change Parameters Screen" on page 41.

The options available on this screen vary, based on the field you select to change and the **Operation** you select to perform.
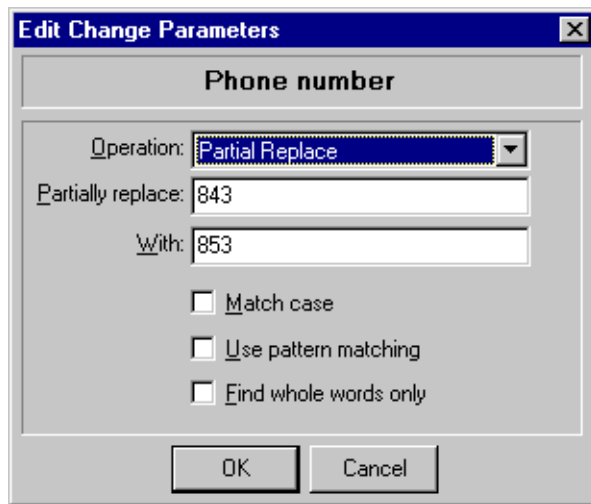
9. In the **Operation** field, select to add, replace, partially replace, delete, increase, decrease, copy, move, or swap information in the field. Not all options are available for every type of change. Your selection in the **Operation** field determines which additional fields and checkboxes appear. For example, when "Partial Replace" is selected, several fields and checkboxes become available.

10. In the **Partially replace** field, enter the information for which you want the program to search and change. It searches for records containing this information. For instance, in the previous example, "843" can be part of a longer number, like a telephone number, but only these three digits are located and replaced. The remainder of the phone numbers are unchanged.

11. In the **With** field, enter the new information you want to replace the information entered in the **Partially replace** field. For instance, in the previous example, "843" is replaced with "853" in all selected records that contain "843" as a phone number entry.

12. To make the change process case-sensitive (for example, to search only for "South" and not "south"), mark the **Match case** checkbox.

13. Mark the **Use pattern matching** checkbox to use wildcard characters such as * and ? in strings of information to be changed.

    You can use the question mark symbol to replace a character. By typing a question mark within a word, you are asking the program to search for every possible spelling of the word with the question mark in that specific spot. More than one question mark is allowed within a word. For example, if you want to locate any constituent with a last name such as Smith or Smyth, you can use the criteria **Last Name** "like" Sm?th. The program selects all constituents whose last name fits the pattern you described.

    You can use the asterisk to replace a series of characters. For example, to locate all constituents with a last name ending with the letters "son", you can enter the criteria **Last Name** "like" *son. The program selects all constituents whose last name ends in son (for example, Simpson, Henderson, or Michaelson).

14. Mark the **Find whole words only** checkbox, and the program searches for whole words only when searching for text to change.

15. Click **OK**. You return to the Global Change screen. Your selected field and operation appear in the **Selected Changes** box.
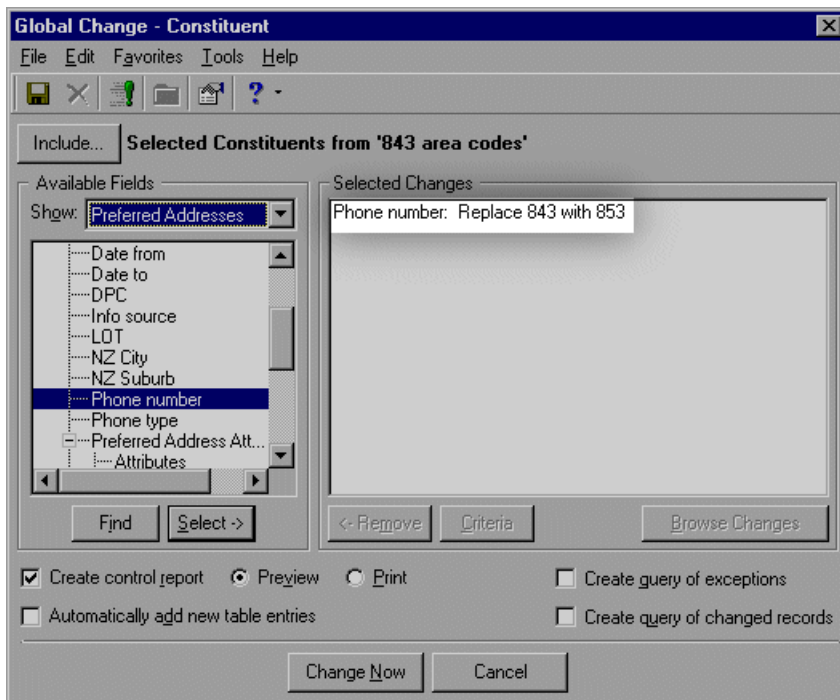
16. Repeat this procedure for each field you want to change.

17. If you want to view the Edit Change Parameters screen for an item in the **Selected Changes** box, highlight the item and click **Criteria**.

18. To delete an item from the **Selected Changes** box, select the item and click **Remove**.

19. The **Browse Changes** button is activated only if you are copying, moving, swapping, replacing, or partially replacing a field. You can preview how a specific field change will affect the selected records before you actually run the global change. To activate the button, select a field entry in the **Selected Changes** box. Click **Browse Changes**. A screen appears showing the records and how the change parameters affect them.
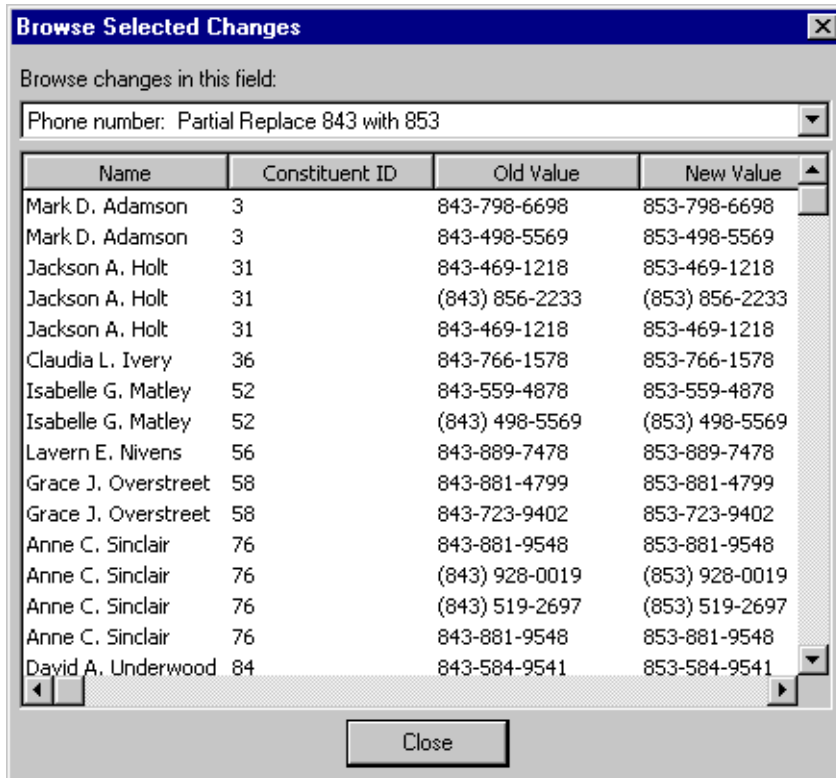
To return to the Global Change screen, click **Close**.

20. On the Global Change screen, if you want to view a list of records that were affected by the change as well as information on records that generated exceptions, mark the **Create control report** checkbox and select the **Preview** option. Or, if you want to print the control report, select the **Print** option. The report appears or prints after the program has processed the change request.

Note: For more information about tables, see the Configuration chapter of the *Configuration & Security Guide*.

21. If you want to automatically add new table entries to tables, mark the **Automatically add table entries** checkbox. If the change specifies a new entry for a code table field, it is automatically added as an entry for that table.

22. If you want to create a query of records that should have been changed but were not changed in this process, mark the **Create query of exceptions** checkbox.

Note: Queries generated in **Globally Change Records** can be accessed in *Query*. For more information, see the *Query & Export Guide*.

23. If you want to create a query of constituent records actually affected by the global change, mark the **Create query of changed records** checkbox.

24. Click **Change Now**. If you indicated that you want to create queries for exceptions and/or changed records, the Save Static Query screen appears once for each query option marked.

25. Enter a **Query Name** and **Description**.

26. The **Query format** field defaults to "Static" and cannot be changed.

27. If you want to allow other users to have access to this query, mark the **Other users may execute this query** checkbox.

28. If you want to allow other users to edit this query, mark the **Other users may modify this query** checkbox.

29. Click **Save**. The Save Global Change As screen appears.
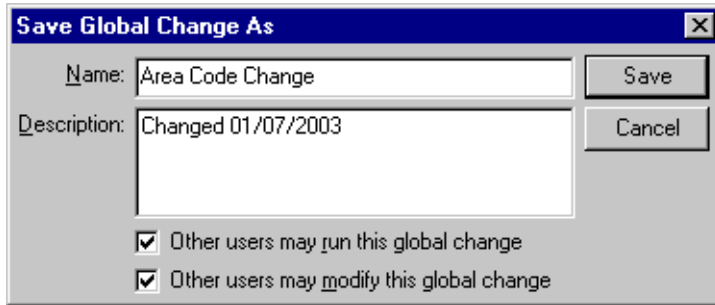
30. In the **Name**, field enter a name for the global change file to appear on the Globally Change Records screen.

31. In the **Description** box, enter information to help you identify the saved file.

32. If you want to allow other users to have access to this global change, mark the **Other users may run this global change** checkbox.

33. If you want to allow other users to edit this global change, mark the **Other users may modify this global change** checkbox.

34. To save the file, click **Save**. The program processes the global change.

    Once the program finishes processing the global change, the Global Change Complete! screen appears. This screen shows the number of records processed, the number of records completely changed, the number of records partially changed, and the number of records unchanged. This screen also provides the total length of time and the rate per record to make the global change.

35. Click **Close**. If you selected to preview a control report, the report appears.
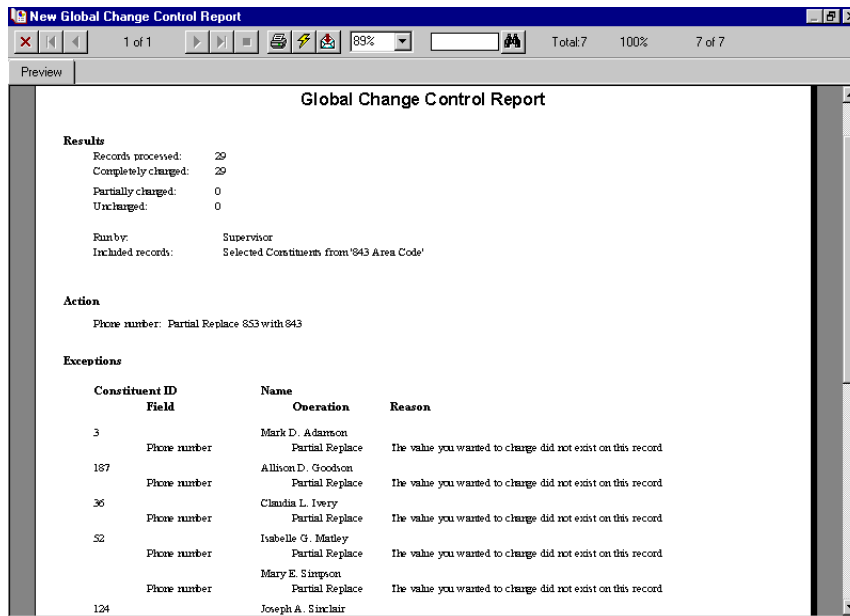
The report details any records that were partially changed or not changed at all and why.

36. To close the report and return to the Global Change screen, click the "X" in the upper right corner.

To print the report, click **Print** on the toolbar.

37. To exit the Global Change screen, select **File**, **Close** from the menu bar. You return to the Globally Change Records page. The new global change parameter file now appears in the grid.

Globally Delete Records

Procedures

The Raiser's Edge 7 makes it easy to delete a group of records from your database. The **Globally Delete Records** function removes a group of records or selected data from a selected group of records in your database. For example, your organization held a golf tournament fundraiser for several years, but now decides to discontinue the event. You want all the golf tournament event record removed from you database. You can use **Globally Delete Records** to remove these events records.

Warning: Before performing a global delete, we strongly recommend you completely back up your database. To successfully back up your data, you must first shut down the database.

The deleting process is based on record types. You can globally delete action, attribute, constituent, event, gift, membership, proposal, relationship, tribute, volunteer job assignment, notepad gift, notepad event, notepad constituent, and constituent appeal record types. Because global deletes are based on record types, you must delete information from one record type at a time.

To record details about your delete process, you can generate a control report. The report includes information about the deleted records and a list of any records not deleted (exceptions). It also gives reasons for each exception. If you create a query of records included in the global delete, you can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*. An exception query contains the records not changed by the global delete process.

Please be aware, you cannot recover deleted records. They are permanently removed from your database.

Navigating in Global Delete

Note: If you globally delete records while a constituent record is open, an exception is generated and the record is not deleted.

The Global Delete screen contains the commands necessary to complete all global delete functions. You can use a variety of parameters to define a global delete process. To access the Global Delete screen, click **Globally Delete Records** on the Administration page.

Warning: Security limitations may prevent some users from accessing **Globally Delete Records**. See the Security chapter in the *Configuration & Security Guide* for a information on establishing system security.

The Global Delete screen appears, displaying the General tab.

Note: For more information about the Global Delete screen, see "Parts of the Global Delete Screen" on page 59.

All fields, buttons, options, and checkboxes on the General tab remain the same, regardless of the **Record type** you select for the deleting process. However, options available on the Delete Options tab change based on the **Record type** selected.

▶ **Opening Globally Delete Records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.

2. Click **Globally Delete Records**. The Global Delete screen appears, displaying the General tab.
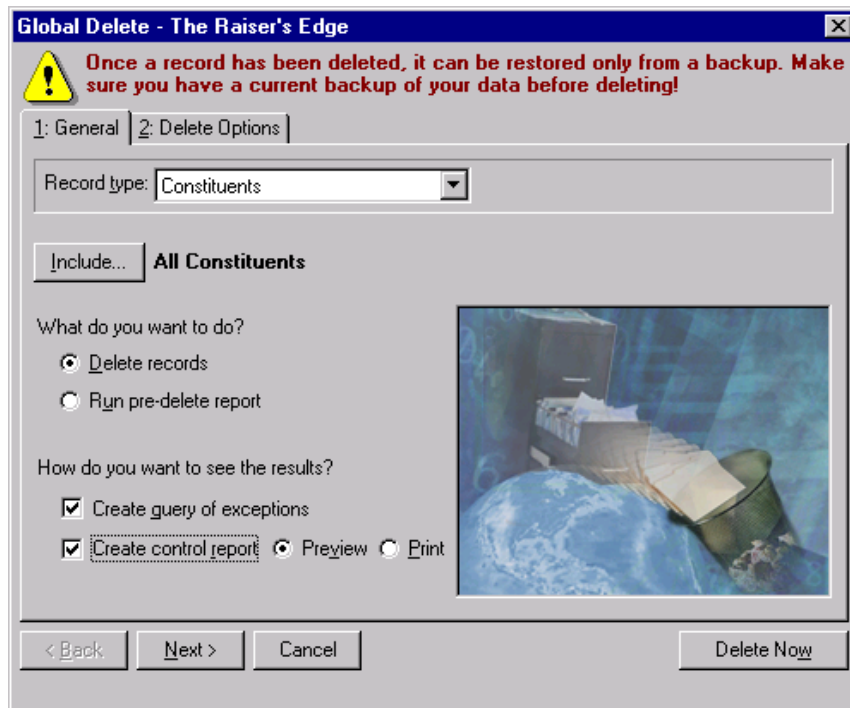
3. Select the record type you want to delete and identify the records you want to include in the procedure. You can also select to run the delete procedure or run a report on all the records the delete procedure will affect.

4. Select the Delete Options tab.
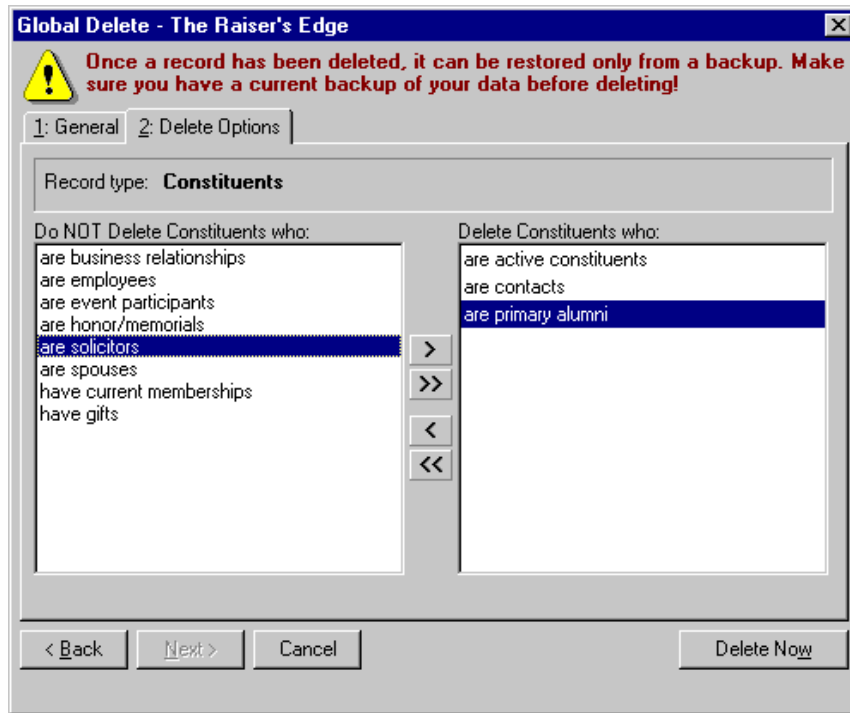
5. On the Delete Options tab, you can refine your delete criteria. For example, if you are deleting Constituent record types, you can select to delete the active constituents and/or contacts only.

6. To globally delete the selected information, click **Delete Now**. You return to the Administration page.

Business Rules

Established in *Configuration*, business rules improve data entry speed and help verify that data is correct.

> **Note**: For more information about business rules, see the Configuration chapter of the *Configuration & Security Guide*.

With business rules, you can perform common tasks in two categories: those with predefined rules and those with rules that you define. Predefined rules are for the most part set up by marking a series of checkboxes and options. They govern a wide variety of functions, such as rules for adding gifts and what constitutes duplicate criteria during searches.

User Options

> **Note**: For more information about User Options, see the *Program Basics Guide*.

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options for **Globally Delete Records**.

Parts of the Global Delete Screen

The Global Delete screen is essentially the same for all record types, but options offered on the Delete Options tab change slightly based on the **Record type** you select on the General tab.

General Tab

On the General tab, identify record types, select records from your database to include, and tell the program what you want to do.
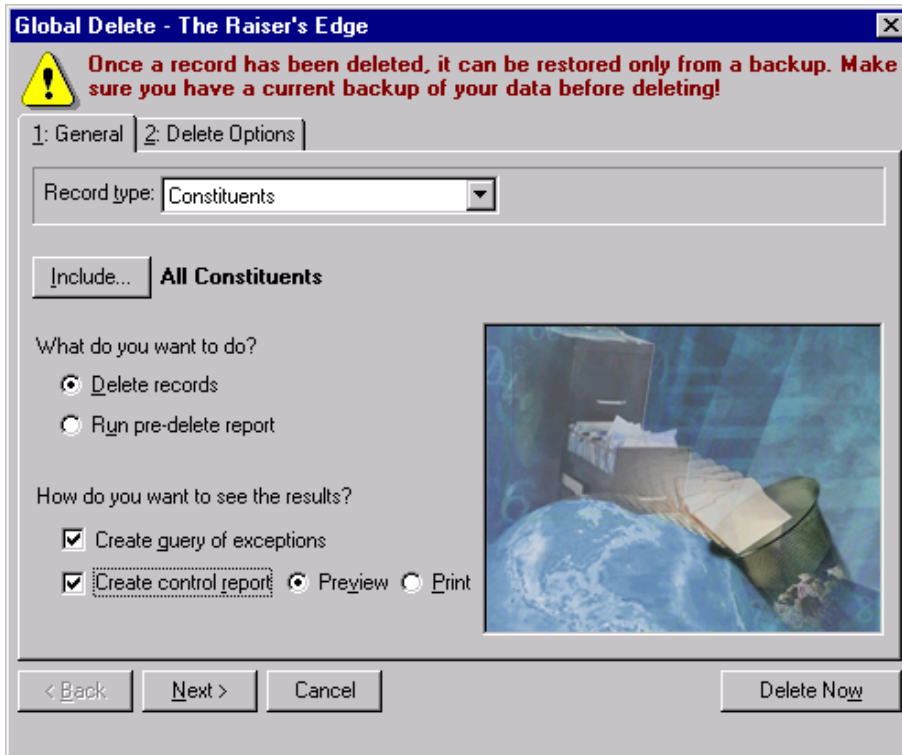
In the **Record type** field, select the record type you want to delete. For example, if you want to delete a golf outing event from all event records, select "Events". The following record types are available:

Actions	Attributes
Constituents	Events
Gifts	Memberships
Proposals	Relationships
Tributes	Volunteer Job Assignments
Notepads - Gifts	Notepads - Events
Notepads - Constituents	Notepads - Actions
Notepads - Proposals	Constituent Appeals

Prospect Ratings

In the **What do you want to do?** frame, select one of the two procedure options.

Delete records. Select this option if you want the program to delete all selected record types without generating a pre-delete report. If selected, the button in the bottom right corner reads **Delete Now**, and the delete procedure starts when you click this button.

Run pre-delete report. Select this option if you want the program to generate a report listing all records affected by the delete procedure before the selected information is removed. If selected, the button in the bottom right corner reads **Run Report Now**. The program generates the report when you click this button. Nothing is deleted and you can return to the Global Delete screen to make changes or cancel the delete procedure if you are not satisfied with the report results.

In the **How do you want to see the results?** frame, mark any of the following checkboxes.

Create control report. This checkbox appears only if you select **Delete records** in the **What do you want to do?** frame. If you mark **Create control report**, the program generates a report after it runs the global delete process. The report includes details about the affected records and a list of any records from which the selected information was not deleted (exceptions). It also gives reasons for each exception. Select the **Preview** option to view the report on your screen. Select the **Print** option to print the control report.

Note: We recommend creating an exception report so you can see which records could not accept the global delete.

Create query of exceptions. If you mark **Create query of exceptions**, the program generates a query of all records that satisfied the global delete criteria but were not changed. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*, or run rerun the delete procedure again.

Create query of records to be deleted. This checkbox appears only if you select **Run pre-delete report** in the **What do you want to do?** frame. If you mark **Create query of records to be deleted,** the program generates a query of all records included in the pre-delete report. You can use the query in other functions of *The Raiser's Edge*, such as *Mail* or *Reports*.

Also common to all Global Delete screens are the buttons, which help you select the information you need to run the global change process.

Include. Use the **Include** button to select records to include in the global delete. You can delete selected information from all records in your database or use queries to select specific records to delete. If you choose selected records, the Open Query screen appears. You must select an existing query and click **Open** or click **Add New** to access *Query* and create a new query.
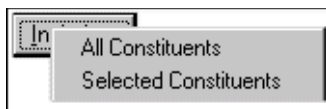
Run Report Now. Use the **Run Report Now** button to generate a report listing all records affected by the delete procedure before the selected information is removed.

Cancel. Use the **Cancel** button to exit **Globally Delete Record**s without running the delete procedure or generating the pre-delete report. You return to the Administration page.

Next. Use the **Next** button to move from the General tab to the Delete Options tab.

Back. Use the **Back** button to move from the Delete Options tab to the General tab.

Delete Options Tab

The Delete Options tab changes slightly, based on the **Record type** you select on the General tab. On the Delete Options tab, you refine your delete criteria. For example, if you are deleting Events record types, on the Delete Options tab, you can choose to include event records that "are active", "have actions", "have jobs", and/or "have participants".
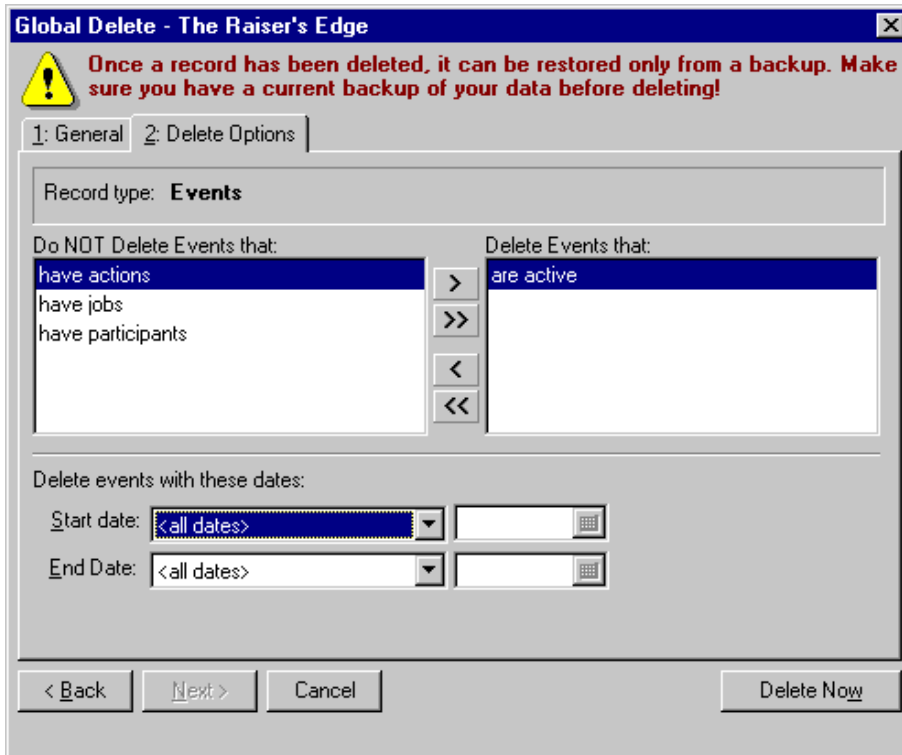
To include an option listed in the **Do NOT Delete Events that** box in your global delete, highlight the option and click the single-right arrow to move the option into the **Delete Events that** box. To include all options, click the double-right arrow. Use the left arrows to remove options from the **Delete Events that** box.

Also, many Delete options tabs include date fields. For example, when deleting an event record type, you can enter a **Start date** and **End Date** and only event records with **Start date** and **End Date** information satisfying the date criteria you enter are included in the global delete. If you do not want date information considered when deleting records, select <all dates> in the date fields.

Some Delete Option tabs use fields instead of boxes to define the records you want to include in the delete process. For example, if you are deleting Membership record types, on the Delete Options tab, you can choose to include membership records satisfying **Current membership lapsed** dates, **Membership expires** dates, a specific **Membership category**, a specific **Membership sub-category**, or a specific **Membership program**.

Select the delete criteria you want satisfied in each field and enter any necessary date information. When deleting Membership record types, you can also mark the **Do not delete lifetime memberships** and **Do not delete memberships linked to gifts** checkboxes, if you do not want these types of memberships deleted from your database.

If you are deleting gifts and on the Delete Options tab you choose to delete gifts posted to the general ledger (are posted), the **Create adjustments to your general ledger for posted gifts** checkbox is activated.
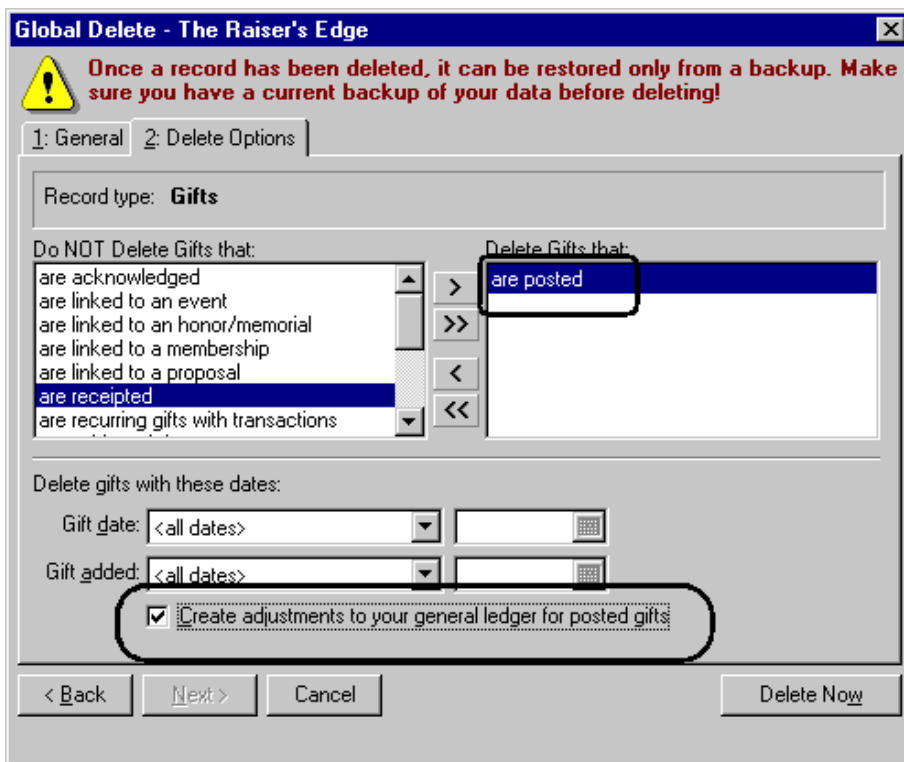
If you mark this checkbox, the program automatically creates adjustments for posted gifts not adjusted to $0. If you do not mark this checkbox, gifts are deleted from the database and the program does not create adjustments for the general ledger.

Global Delete Record Types

Globally Delete Records helps you maintain your *Raiser's Edge* records. You can remove unnecessary records by identifying the record type and selecting the delete options available for the record type. Each record type appears as an option in the **Record type** field on the General tab. All delete options are on the Delete Options tab.

Actions

Actions are the specific steps you take toward securing a donation from a constituent. They may include meetings, mailings, telephone calls, and email messages. Actions allow you to build a history of the contacts and communications involved in creating a successful relationship with a constituent. In addition to tracking meetings, phone calls, and mailings, *The Raiser's Edge* can automatically remind you days, weeks, or months before an action is scheduled to occur.

> **Note**: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

Should you no longer need an action, you can globally delete it from your database. For example, your organization needs to clean out its database and decides to delete all completed actions with an action date on or before 01/01/2000. Using **Globally Delete Records**, you can delete all action **Record types** with the **Action status** of "Completed". You can also specify you want only action records with an **Action date** "on or before" a specific date.

Attributes

Attributes are the qualities, characteristics, and preferences you associate with a record type. For example, in a constituent record they serve as a way for you to identify a constituent's special interests, dietary preferences, or mailing requests. Attributes may include hobbies, interests, activities, committees, and important dates. One of the most useful aspects about attributes is their flexibility. You can customize attributes to meet your organization's specific needs. Attributes are initially created and defined in *Configuration.*

Note: For more information about attributes and setting them up in *Configuration*, see the Configuration chapter in the *Configuration & Security Guide*.

Should you no longer need an attribute, you can globally delete it from your database. For example, your organization no longer wants insurer information included in event records. Using **Globally Delete Records**, you can delete the event attribute "Insurer" from all event records and **Attributes** in *Configuration*.

Constituents

Constituents are individuals or organizations who support your organization by contributing time, money, and resources. You can globally delete constituent records in your database. For example, while entering constituents through *Batch*, a volunteer for your organization makes repeated data entry mistakes. You decide it is easier to reenter the batch than to try and correct all the records individually. Using **Globally Delete Records**, you can delete all records included in the batch query.

Events

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

Events are occasions such as golf tournaments, banquets, or dances you use to raise funds. If you have Event Management, you can globally delete event records. For example, during your annual database clean up, you want to remove all inactive event records five-years old or older that have no participants. Using **Globally Delete Records** and the Delete Options tab, you can remove these records from your database in a few simple steps.

Gifts

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

A gift record contains detailed information about a donation given to your organization by a specific constituent. This information includes the gift date, amount, and type; the solicitor responsible for obtaining the gift; and the campaign, fund, appeal, and package to which the gift is designated. Gift records are designed to store all information relating to a single gift in one place. Each gift donated to your organization has a separate gift record. You can globally delete gift records from your database. For example, while entering gifts through *Batch*, a volunteer for your organization makes repeated data entry mistakes. You decide it is easier to reenter the batch than to try and correct all the records individually. Using **Globally Delete Records,** you can delete all records included in the batch query.

Memberships

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

Membership records help you track multiple memberships and programs, produce reports to analyze membership activity, print lists and directories of members, link gift records to membership records, and perform specific mailing tasks, such as preparing membership cards and renewal notices. If you have Membership Management, you can globally delete membership records from your database. For example, during your annual database clean up, you want to remove all memberships lapsed for five years or more. Using **Globally Delete Records** and the Delete Options tab, you can remove these records from your database in a few simple steps.

Proposals

Note: For more information about proposal records, see the *Prospect Data Entry Guide*.

A proposal is a formal plan, detailing how your organization intends to win funds from a prospective donor, how much financial support you expect, and where the money will be used. For example, you read an article about one of your organization constituents and learned the company recently made a large profit on the sale of one of its subsidiary companies. You can record this information in the various categories on the Prospect tab, and use the **Proposal** category to determine how and how much you intend to solicit from this constituent. If you have Prospect Research Management, you can globally delete proposal records from your database. For example, during your annual database clean up, you want to remove all proposal records on hold for five years or more. Using **Globally Delete Records** and the Delete Options tab, you can remove these records from your database in a few simple steps.

Relationships

Note: For more information about relationship records, see the Constituent Records chapter in the *Constituent Data Entry Guide*.

A relationship is a familial or social association with a constituent. In **The Raiser's Edge**, you can track five different types of relationships for a constituent. These relationships are individuals (friends, family members, associates), organizations (businesses, clubs, employers), bank/financial institutions (credit, financial, and lending institutions), education/schools (schools, colleges, and universities), and assigned solicitor (individuals or organizations assigned to secure donations from the constituent). You can globally delete relationships from your database. For example, while entering constituent records through *Batch*, a volunteer for your organization fails to follow your data entry protocol when entering relationships. You decide it is easier to reenter the batch than to try and correct all the records individually. Using **Globally Delete Records**, you can delete all records included in the batch query.

Tributes

Note: For more information about tribute records, see the *Tribute Data Entry Guide*.

A tribute explains the reason you are honoring, memorializing, or celebrating a constituent. For example, Jane McBeth is participating in a walk-a-thon to help fund your Relief Campaign. Many of her friends are donating gifts to your organization to support Jane's participation in the walk-a-thon. On Jane's constituent record, you can create a tribute "in support of" Jane's efforts so you can record the gifts received on her behalf. If you have Honor/Memorial Tracking, you can globally delete tributes from your database. For example, while entering tribute gifts through *Batch*, a volunteer for your organization fails to follow your data entry protocol. You decide it is easier to reenter the gift information than to try and correct all the records individually. Using **Globally Delete Records** you can delete all gifts included in the batch query.

Volunteer Job Assignments

> **Note**: For more information about volunteer job assignments, see the *Volunteers & Jobs Data Entry Guide*.

A job assignment is a record you create when you assign a volunteer to a job. You can manually find a job and assign it to a volunteer by using the **New Job Assignment** button on the Volunteer tab of his constituent record, or you can automatically find jobs and assign them to a volunteer by using the **Find Jobs** button on the same tab. For added convenience, you can also automatically find volunteers and assign them to a job by using **Tools**, **Find Volunteers** from the menu bar of the job record itself. If you have Volunteer Management, you can globally delete volunteer job assignments from your database. For example, during your annual database clean up, you want to remove all volunteer job assignments 10-years old or older. Using **Globally Delete Records** and the Delete Options tab, you can remove these records from your database in a few simple steps.

Notepads - Gifts

> **Note**: For more information about notes in gift records, see the *Gift Entry Guide*.

In a gift record, on the lower half of the Miscellaneous tab, you can add notes about your gifts. For example, if a constituent donates a large gift, you can add a note concerning how you were able to convince the constituent to donate the gift. You can globally delete note information from gift records. For example, while entering a group of gifts through *Batch*, a volunteer for your organization fails to follow your data entry protocol when entering gift notes. You decide it is easier to reenter the note information than to try and correct all the records individually. Using **Globally Delete Records**, you can delete all notes from the gift records included in the batch query.

Notepads - Events

> **Note**: For more information about the Notes tab of event records, see the *Event Management Data Entry Guide*.

In an event record, on the Notes tab, you can add notes about your events. For example, you can store notes about your tennis or golf tournament. You can add location notes, prospect notes, or any other notes related to your tournament. If you have Event Management, you can globally delete note information from event records. For example, while entering event records yesterday, a volunteer for your organization entered alternate location information for a number of events for which you do not have alternate information. You have a query of the records this volunteer worked with and decide to delete this inaccurate note information. Using **Globally Delete Records** and the Delete Options tab, you can delete all the alternate location notes from the event records included in the query.

Notepads - Constituents

> **Note**: For more information about the Notes tab of constituent records, see the Constituent Records chapter in the *Constituent Data Entry Guide*.

In a constituent record, on the Notes tab, you can enter notes to record family history, prospect information, or special donation instructions. Each note has a **Date**, **Type**, **Title**, **Description**, and **Author**. The note itself accepts free-form text and holds an unlimited amount of information. You can globally delete note information from constituent records. For example, while entering constituent records yesterday, a volunteer for your organization mistakenly entered event notes in the constituent records. You have a query of the records this volunteered worked with, and you know she entered "Event Notes" in the **Type** field whenever she entered the notes. Using **Globally Delete Records** and the Delete Options tab you can delete all the event notes from the constituent records included in the query.

Notepads - Actions

Note: For more information about the Notes tab of action records, see the Action Records chapter in the *Constituent Data Entry Guide*.

In an action record, on the Notes tab, you can record information about the action. Notes are records you keep to remind yourself of something you heard, read, need to reference, or need to remember about the action.

Each note has a **Date**, **Type**, **Title**, **Description**, and **Author**. The note itself accepts free-form text and holds an unlimited amount of information. You can globally delete note information from action records. For example, while entering constituent records yesterday, a volunteer for your organization mistakenly entered gift notes in the action records. You have a query of the records this volunteered worked with. Using **Globally Delete Records** you can delete all the gift notes from the action records included in the query.

Notepads - Proposal

Note: For more information about the Notes tab of proposal records, see the *Prospect Data Entry Guide*.

In a proposal record, on the Notes tab, you can record information about the proposal. Notes are records you keep to remind yourself of something you heard, read, need to reference, or need to remember about the proposal.

Each note has a **Date**, **Type**, **Title**, **Description**, and **Author**. The note itself accepts free-form text and holds an unlimited amount of information. You can globally delete note information from proposal records. For example, while entering constituent records yesterday, a volunteer for your organization mistakenly entered constituent notes in the proposal records. You have a query of the records this volunteered worked with. Using **Globally Delete Records** you can delete all the constituent notes from the proposal records included in the query.

Constituent Appeals

Note: For more information about constituent appeals, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

Appeals are the means you use to raise money for your organization. They can be anything from a letter, to a phonathon, to a dinner party. You enter constituent appeals on the Appeals tab on the constituent record. This tab shows you at a glance how responsive a constituent has been to your solicitations. It tracks every attempt you made to secure a donation and shows you which ones were successful. The Appeals tab also lists gift totals for appeals to which the constituent responded.

You can globally delete appeals from the constituent record. For example, while entering constituent records through *Batch*, a volunteer for your organization accidently entered Direct Mail as the assigned appeal for each new constituent. There should be no appeal assigned to these records. Using **Globally Delete Records** and the query of the affected records, you can delete the assigned appeal information from all the new constituent records.

Prospect Ratings

Ratings are statistics on your constituents' giving potential compiled by your organization or an outside prospect research agency. These ratings can be based on articles published on your constituents, Income Tax returns, data received from the SEC, etc. You can enter ratings information manually or electronically transfer ratings data provided by an outside agency.

Note: For information about prospect ratings, see the *Prospect Data Entry Guide*.

You can globally delete ratings from the constituent record. For example, your organization likes to keep rating three years. Any rating information older than three years, you want to delete from your database. Using **Globally Delete Records**, you can delete ratings stultifying your specific date requirements.

Globally Deleting Records Basics

Accessed through **Admin** on the Raiser's Edge bar, **Globally Delete Records** deletes selected records from your database. When you globally delete a record from your database, it is permanently removed. The only way to retrieve the record is by restoring your database from a backup.

Also, you can globally delete records only if you are assigned the proper security privileges. Security is established in **Security**, accessed through the Administration page. For more information on establishing security rights, see the Security chapter in the *Configuration & Security Guide*.

Query Types

When globally deleting records, you can select to delete all records or selected records. If you choose selected records, you must have a query of the records you want to include in the deleting process. You create query files in *Query*.

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

Query performs two tasks. First, it segments your database based on criteria you define. Second, it groups records for quick reference and use in other areas of the program, such as **Globally Delete Records**. For example, you can create a query of all inactive constituents as of a specific date. You can then use that query to delete the constituents from your database.

You must also make sure the query type under which the records are saved is compatible with the record type you select to delete. Selecting a specific query type instructs the program to select that particular record type for inclusion in the query. Query types determine the field categories available to include in a query.

The following record and query types are compatible for use in **Globally Delete Records**.

Record Type	Query Type
Actions	Constituent, Individual, Organization, Action, Event
Attributes	Not applicable
Constituents	Constituent, Individual, Organization
Events	Event
Gifts	Constituent, Individual, Organization, Gift
Memberships	Constituent, Individual, Organization, Membership
Proposals	Individual, Organization, Constituent
Relationships	Relationship

Record Type	Query Type
Tributes	Individual, Organization, Constituent
Volunteer Job Assignments	Individual, Organization, Constituent, Job
Notepads - Gifts	Gift
Notepads - Events	Event
Notepads - Constituent	Constituents
Constituent Appeals	Constituent, Individual, Organization, Appeal

Globally Deleting Records

You must complete two tabs when globally deleting records. The General tab requires you to select the record types you want to delete and then select the specific records you want included in the process. You can include all records satisfying the type you selected or only records included in a query. Next, you must tell the program what you want to do. You can generate a pre-delete report and review the records the process will remove from your database or run the deletion process. Finally on the General tab, you can choose to create a variety of queries and/or a control report.

On the Delete Options tab, you select specific delete options. These options change based on the record type you selected to globally delete.

▶ **Globally deleting records**

1. On the Raiser's Edge bar, click **Admin**. The Administration screen appears.

2. Click **Globally Delete Records**. The Global Delete screen appears, displaying the General tab. The General tab includes the same fields, buttons, checkboxes, and options, regardless of the record type you select.
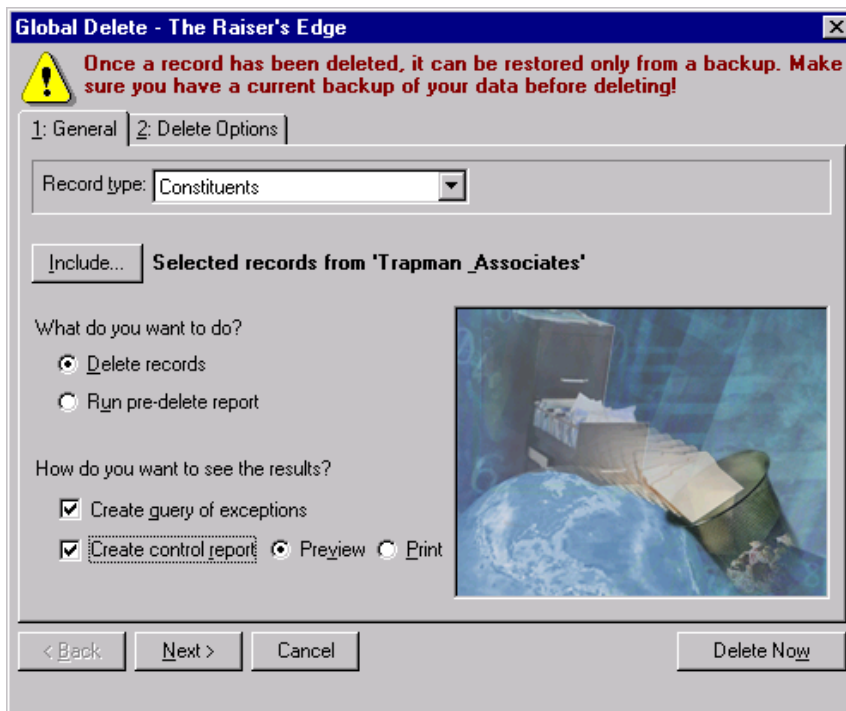
3. In the **Record type** field, click the drop-down arrow and select the record type you want to globally delete**. For example, if you want to delete constituent records from your database, select "Constituents".**

Note: For information about each Record type option, see "Global Delete Record Types" on page 64.

4. To select the specific records from your database you want to include in the global delete process, click **Include**. You can include All or Selected records.

If you choose All, the program deletes all selected record types in your *Raiser's Edge* database that satisfy any criteria you select on the Delete Options tab. For example, if you select All and are deleting Constituent record types, you can restrict the deleting process to only inactive constituent records, if on the Delete Options tab you select to not delete active records.

If you choose Selected records, the Open Query screen appears, displaying a blank grid. In the **Find Queries that meet these criteria** frame, you can enter information limiting your query search. Or, to locate all relevant queries, leave the criteria fields blank.

Click **Find Now**. All existing queries, satisfying the criteria you entered appear in the grid.
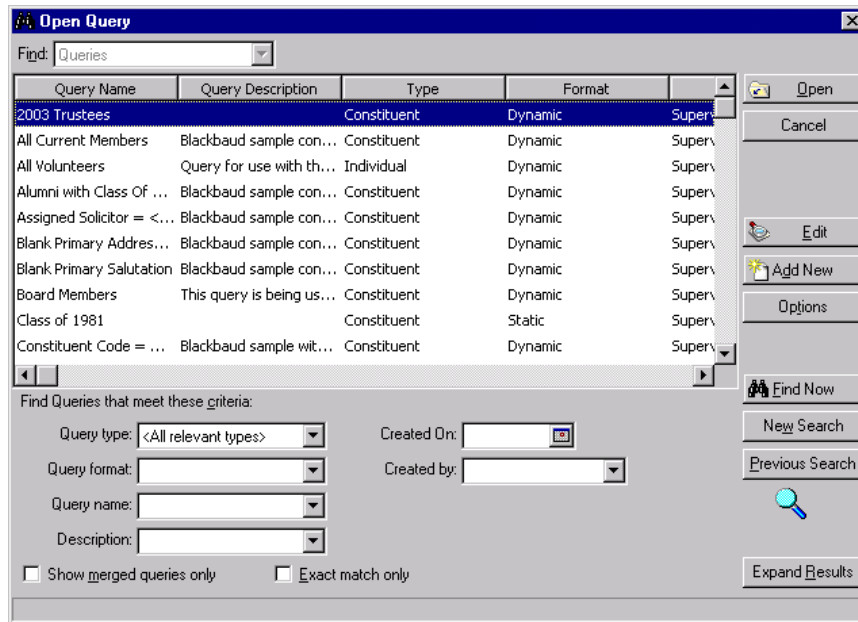
Select the query that includes the records you want to delete, and click **Open** to return to the Global Delete screen.

Note: For more information about creating a query, see the *Query & Export Guide*.

If the query does not exist, click **Add New** to access *Query* and create a query.

5. On the Global Delete screen, in the **What do you want to do?** frame, select one of the following options.

   • Select **Delete records** if you are ready to run the global delete process. If you select this option and click **Delete Now**, the program starts deleting information from your *Raiser's Edge* database based on the criteria you entered on the General and Delete Options tabs.

   • Select **Run pre-delete report** if you want to review the global delete parameters selected for the procedure, the number of records that will be affected by the procedure, and any exceptions the program will not delete and why. If you select this option, nothing is deleted.

6. In the **How do you want to see the results?** frame, mark any or none of the following checkboxes.

   • **Create query of exceptions** creates a query of all records satisfying the delete criteria that the program cannot delete. If you mark this checkbox, when you click **Delete Now** or **Run Report Now**, a screen appears asking you to name the query. The new query type is the same as the record type you selected to delete.

   • **Create control report** appears if you choose to **Delete records** in the **What do you want to do?** frame. The report details the parameter settings used for the global delete procedure.

   • **Create query of records to be deleted** appears if you choose **Run pre-delete report** in the **What do you want to do?** frame. Mark this checkbox if you want a query of records that will be deleted if you run the deletion process. If you mark this checkbox, when you click **Run Report Now**, a screen appears asking you to name the query. The new query type is the same as the record type you select to delete. You can use the query in other *Raiser's Edge* functions, such a *Mail* or *Reports*.

7. Select the Delete Options tab.
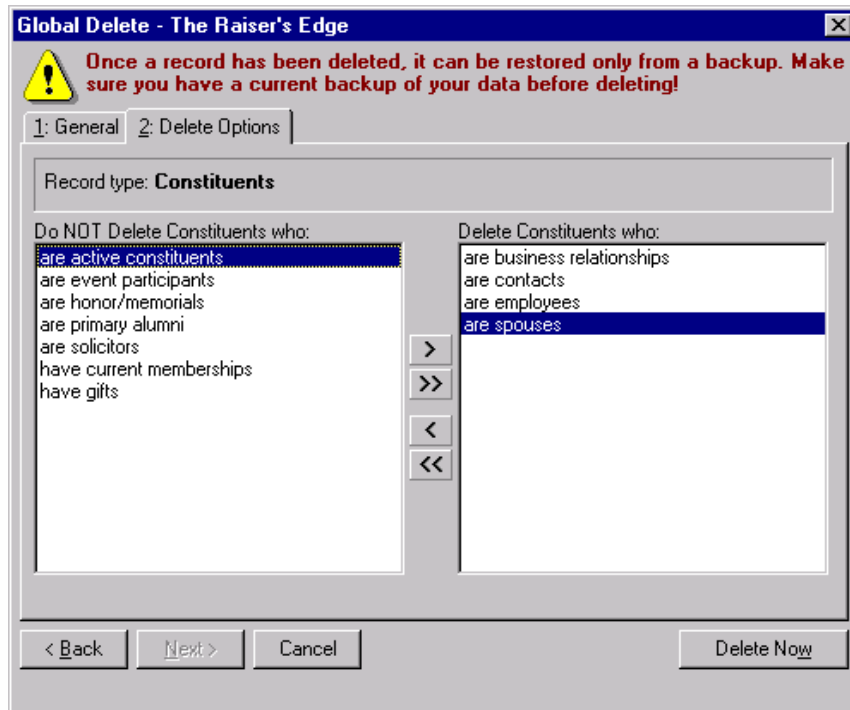
8. On this tab, refine your delete criteria. For example, if you are deleting constituent record types, you may not want to include active constituents in the delete process. To not delete active constituent, make sure "are active constituents" is in the **Do NOT Delete Constituents who** box. If you want the active constituents included in the delete process, use the right arrow and move "are active constituents" into the **Delete Constituents who** box. The information included on this screen varies, based on the **Record type** you selected on the General tab.

The appearance of the Delete Options screen also changes based on the **Record type** you select. If you select Actions, Memberships, Proposals, Tributes, Volunteer Job Assignments, or Constituent Appeals, you refine your delete criteria using a number of fields on the Delete Options screen.

For example, if you are deleting tribute record types, on the Delete Options tab, you restrict the tribute records deleted based on **Date from**, **Date to**, or **Tribute type**. This information is entered on the tribute record. You can also choose to not delete active tributes or tributes with gifts given by marking the **Do not delete tributes that are active** and/or the **Do not delete tributes with gifts given** checkboxes.

Similar fields and checkboxes appear for the other record types listed. The fields and checkboxes relate to specific information entered on the related record type.

9. To run the global delete, click **Delete Now** or **Run Report Now**.

10. If on the General tab you selected to create any queries, a screen appears, asking you to name and describe the query. The screen appears once for each query you chose to create.

11. Click **OK**. A progress bar appears.

12. If you clicked **Delete Now**, the Finish screen appears after the program processes all the records, displaying the number of Records Processed, Records Deleted, and Exceptions.

13. Click **OK**. You return to the Administration page.

14. If you clicked **Run Report Now**, the pre-delete report appears. From this screen you can print, refresh, or export the report.

15. To close the report and return to the Global Delete screen, click the red "X" in the upper left corner. You can then click **Delete records** or click **Cancel** to exit Global Delete without deleting records.

Fields You Can Globally Add, Delete, & Change

The global features available in **The Raiser's Edge** make it easy to add, delete, and change information contained in selected or all records in your database. Although the global features offer a wide range of add, delete, or change options, not all **Raiser's Edge** data is available. For example, in **Globally Add Records**, you can use the "Email" **Add** option to send a message to constituents in your database; you cannot, however, add email information, such as an email address, to a constituent record using **Globally Add Records**.

The purpose of this document is to help you understand what you can accomplish using the global features. For instructions about working in **Globally Add Records**, see "Globally Add Records" on page 1. For instructions about working in **Globally Change Records**, see "Globally Change Records" on page 31. For instructions about working in **Globally Delete Records**, see "Globally Delete Records" on page 55.

What You Can Add, Change, and Delete Using the Global Features

Using **Globally Add Records, Globally Change Records**, or **Globally Delete Records** in **The Raiser's Edge** makes it easy to maintain information in a group of records in your database. For example, instead of using valuable hours adding an appeal to each constituent record, you can add the appeal to all or selected records with just one process and without opening every constituent record. You can even send email messages to all or selected constituents.

> **Warning**: **The Raiser's Edge** does not check to see if the information you add already exists in a record. The program adds the selected information to all records in the specified group.

In **Globally Add Records,** you tell the program what you want to add using the **Add** field on the Global Add screen. For example, if you want to add a phone call action to constituent records, select "Action" in the **Add** field. You can then access the Global Add - Action Screen and define the action information you want added to the records. If you want to add a note to constituent records, select "Notepad" in the **Add** field. You can then access the Notepad for Global Add screen and define the note information you want to add. For a detailed procedure about working in **Globally Add Records**, see the Globally Adding Records Basics section in "Globally Add Records" on page 1.

In **Globally Change Records,** you select the category in which you want to change information. You then select the specific information you want to change and the change operation; you can add, remove, partially remove, delete, increase/decrease, copy, swap, or move information. The operations available vary based on the field you select to change. For example, in *Event Management*, you have event location information entered, and you learn the location has changed. Using the **Event** category in **Globally Change Records**, you can replace the old location with the new on all or selected records in your database. For a detailed procedure about working in **Globally Change Records**, see "Globally Change Records" on page 31.

In **Globally Delete Records**, you can remove a group of records or selected data from a selected group of records in your database. For example, your organization held a golf tournament fundraiser for several years but now decides to discontinue the event. You want all the golf tournament event record removed from you database. You can use **Globally Delete Records** to remove these events records. For a detailed procedure about working in **Globally Delete Records**, see "Globally Delete Records" on page 55.

Actions

You can globally add, globally change, and globally delete action information.

Globally Add

The following table displays the type of action information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Action	You can access the Global Add - Action screen by clicking the **Action Information** button on the Global Add screen. From the Global Add - Action screen, you can add a phone call, meeting, mailing, email, task, or other action type to the selected constituent or event records. You can also add action attributes and notes to the Attributes and Notes tab of the action record.

Globally Change

The following tables display the type of action information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Action** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Action Attributes

Action Attributes

Available Fields	Valid Operations
Attributes	A, D

Valid Operations Key

Interest Generated

(Action Attributes;Interest Generated?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Left Message?

(Action Attributes;Left Message?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Responded

(Action Attributes;Responded?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Valid Operations Key

Action Notepads

Action notepads

Available Fields	Valid Operations
Author	A, R, PR, D
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Actions

Actions

Available Fields	Valid Operations
Action Date	A, R, I/D, C S
Alert Title	A, R, D, C, S, M
Appeal	A, R, D
Campaign	A, R, D
Category	A, R
Completed	A, R
Completed Date	A, R, D, I/D, C, S, M
Delivery Method	A, R, D, C, S, M
End Time	A, R, PR, D, C, S, M
Fund	A, R, D
Issue	A, R, D, C, S, M
Letter	A, R, D, C, S, M
Location	A, R, D, C, S, M
Message ID	A, R, D, C, P/R, S, M
Priority	A, R
Recipient Name	A, R, D, C, P/R, S, M

Available Fields	Valid Operations
Start Time	A, R, PR, D, C, S, M
Status	A, R, D, C, S, M
Type	A, R, D, C, S, M

Globally Delete

Note: For information about creating a query of action records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Actions on the General tab of **Globally Delete Records**, you can globally delete actions. You can base the process on a number of filtering options, or you can create a query of all actions you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for action records.

Filtering Options
Action date
Action added (date)
Action category
Action type
Action status

Appeals

You can globally add, globally change, and globally delete appeal information.

Globally Add

The following table displays the type of appeal information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Appeal	You can access the Global Add - Appeal screen by clicking the **Appeal Information** button on the Global Add screen. From the Global Add - Appeal screen, you can add any appeal available in your database to all selected constituent records. You can also add package, date, response, and comments information.

Globally Change

The following table displays the type of appeal information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Appeal** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Valid Operations Key

Appeals

Appeal Attributes

Available Fields	Valid Operations
Attributes	A, D

Donor list used?

(Appeal Attributes;Donor list used?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Appeal Benefits

Appeal Benefits

Available Fields	Valid Operations
Comments	A, R, PR, D
Count	A, R, D, I/D
Include benefit notes on receipt	A, R
Notes	A, R, PR, D, C, S, M
Sent	A, R, D
Unit Cost	A, R, I/D

Appeal Expenses

Appeal Expenses

Available Fields	Valid Operations
Amount	A, R, I/D
Budgeted	A, R, D, I/D
Comments	A, R, PR, D
Date	A, R, D, I/D

Appeal Packages

Appeal Packages

Available Fields	Valid Operations
Default gift amount	A, R, D, I/D
End date	A, R, D, I/D
Inactive	A, R
Notes	A
Start date	A, R, D, I/D

Package Attributes

(Appeal Package;Package Attributes)

Available Fields	Valid Operations
Attributes	A, D

Segment

(Appeal Package;Package Attributes;Segment)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Appeals

Appeals

Available Fields	Valid Operations
Appeal category	A, D, R, C, S, M
Appeal is inactive	A, R
Campaign ID	A, D
Default gift amount	A, R, D I/D, C, S, M
End date	A, R, D, I/D, C, S, M
Fund ID	A, D
Limit Campaigns	A, R
Limit Funds	A, R
Notes	A
Overall goal	A, R, D, I/D, C, S, M
Start date	A, R, D, I/D, C, S, M

Globally Delete

> **Note**: For information about creating a query of action records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Constituent Appeals on the General tab of **Globally Delete Records**, you can globally delete appeals from constituent records. You can base the process on a number of filtering options, or you can create a query of all constituent records you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for appeals.

Filtering Options
Appeal ID
Package
Date (date)
Response
Category

Assigned Solicitor

You can globally add assigned solicitors.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Assigned Solicitor	You can access the Global Add - Solicitor Assignment screen by clicking the **Assignment Information** button on the Global Add screen. From the Global Add - Solicitor Assignment screen, you can add a new assignment.

Attributes

You can globally add, globally change, and globally delete attributes.

Globally Add

The following table displays the type of attribute information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Constituent Attributes	You can access the Global Add - Constituent Attribute screen by clicking the **Attribute Information** button on the Global Add screen. From the Global Add - Constituent Attribute screen, you can select the attribute category and enter description, date, and comment information you want added to all selected constituent records. The information is added to the Attributes tab of the constituent record.

Globally Change

You can globally change attributes in a number of areas in *The Raiser's Edge*. The following tables display the type of attribute information you can change.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

You access this feature in various locations in **Globally Change Records**, depending on the area of the program in which you want to change attribute information. For example, if you want to change attributes in your action records, you must open the **Action** category on the Globally Change Records page. The Action Attributes field category appears in the **Available Fields** box on the Global Change - Action screen.

Action Records

To globally change action attributes, from the Globally Change Records page, click Action under the **Action** category. The Global Change - Action screen appears. The Action Attributes field category appears in the **Available Fields** box.

Action Attributes

Action Attributes

Available Fields	Valid Operations
Attributes	A, D

Attended

(Action Attributes;Attended?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Dietary Preference

(Action Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interest Generated?

(Action Attributes;Interest Generated?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Left Message?

(Action Attributes;Left Message?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Responded?

(Action Attributes;Responded?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Appeal Records

To globally change appeal attributes, from the Globally Change Records page, click Appeal under the **Appeal** category. The Global Change - Appeal screen appears. The Appeal Attributes field category appears in the **Available Fields** box.

Appeal Attributes
Appeal Attributes

Available Fields	Valid Operations
Attributes	A, D

Donor list used

(Appeal Attributes;Donor list used?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Package Attributes

For appeals, to globally change package attributes, use the Package Attributes field category, which appears in the **Available Fields** box, under **Appeal Packages**.

Package Attributes

Available Fields	Valid Operations
Attributes	A, D

Segment

(Package Attributes;Segment)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Campaigns

To globally change campaign attributes, from the Globally Change Records page, click Campaign under the **Campaign** category. The Global Change - Campaign screen appears. The Campaign Attributes field category appears in the **Available Fields** box.

Campaign Attributes

Campaign Attributes

Available Fields	Valid Operations
Attributes	A, D

Campaign Manager

(Campaign Attributes;Campaign Manager)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Major Donors Only?

(Campaign Attributes;Major Donors Only?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Constituents

To globally change constituent attributes, from the Globally Change Records page, click Constituent under the **Constituent** category. The Global Change - Constituent screen appears. The Constituent Attributes field category appears in the **Available Fields** box.

Address Attributes
All Address Attributes

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Constituent Attributes
Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Address Attributes

All Addresses;All Address Attributes

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Education Attributes
Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Preferred Address Attributes
Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Primary Alumni Attributes
Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Events

To globally change event attributes, from the Globally Change Records page, click Event under the **Event** category. The Global Change - Event screen appears. The Event Attributes field category appears in the **Available Fields** box.

Event Attributes
Event Attributes

Available Fields	Valid Operations
Attributes	A, D

Chairperson

(Event Attributes;Chairperson)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Event Locale

(Event Attributes;Event Locale)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Event Success Rate

(Event Attributes;Event Success Rate)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Handicap Accessible?

(Event Attributes;Handicap Accessible?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Insurer

(Event Attributes;Insurer)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Prizes Donated

(Event Attributes;Prizes Donated)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Rain Location

(Event Attributes;Rain Location)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Funds

To globally change fund attributes, from the Globally Change Records page, click Fund under the **Fund** category. The Global Change - Fund screen appears. The Fund Attributes field category appears in the **Available Fields** box.

Fund Attributes

Fund Attributes

Available Fields	Valid Operations
Attributes	A, D

Restrictions

(Fund Attributes;Restrictions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Gifts

To globally change gift attributes, from the Globally Change Records page, click Gift under the **Gift** category. The Global Change - Gift screen appears. The Gift Attributes field category appears in the **Available Fields** box.

Gift Attributes
Gift Attributes

Available Fields	Valid Operations
Attributes	A, D

Adopt An Animal

(Gift Attributes;Adopt An Animal)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Auction ID

(Gift Attributes;Auction ID)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Auction Item

(Gift Attributes;Auction Item)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Beneficiary

(Gift Attributes;Beneficiary)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Check Routing

(Gift Attributes;Check routing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Declared Value

(Gift Attributes;Declared Value)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Deposit Date

(Gift Attributes;Deposit Date)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Donated By

(Gift Attributes;Donated By)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Donor Designation

(Gift Attributes;Donor Designation)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Gift Transfer Date

(Gift Attributes;Gift transfer date)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Gift-in-Kind Type

(Gift Attributes;Gift-in-Kind Type)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Item Number

(Gift Attributes;Item Number)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Named Giving Opp

(Gift Attributes;Named Giving Opp)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Purchased By

(Gift Attributes;Purchased By)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Remainderman Fund

(Gift Attributes;Remainderman Fund)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reminder Sent

(Gift Attributes;Reminder Sent)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Sold On

(Gift Attributes;Sold On)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Source

(Gift Attributes;Source)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Individuals

To globally change individual constituent attributes, from the Globally Change Records page, click Individual under the **Constituent** category. The Global Change - Individual screen appears. You can select the type of individual constituent attributes (address, education, etc) you want to change in the **Available Fields** box.

Address Attributes
All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attribute;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attribute;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Constituent Attributes
Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D I/D

Special Mailing Type

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Education Attributes
Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Position

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Preferred Address Attributes
Preferred Address Attributes

(Preferred Address;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Preferred Address;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Address;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Primary Alumni Attributes
Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R. D

Leadership Position

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reasons Left?

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Reasons Left?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Jobs

To globally change job attributes, from the Globally Change Records page, click Job under the **Job** category. The Global Change - Job screen appears. The Job Attributes field category appears in the **Available Fields** box.

Job Attributes
Job Attributes

Available Fields	Valid Operations
Attributes	A, D

Education Level

(Job Attributes;Education Level)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Location Type

(Job Attributes;Location Type)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Memberships

To globally change membership attributes, from the Globally Change Records page, click Membership under the **Membership** category. The Global Change - Membership screen appears. The Membership Attributes field category appears in the **Available Fields** box.

Membership Attributes
Membership Attributes

Available Fields	Valid Operations
Attributes	A, D

Day Passes

(Membership Attributes;# Day Passes)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Exhibit Interests

(Membership Attributes;Exhibit Interests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Holiday Gift?

(Membership Attributes;Holiday Gift?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R,

Membership Sponsor

(Membership Attributes;Membership Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Purchase Location

(Membership Attributes;Purchase Location)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organizations

To globally change organization constituent attributes, from the Globally Change Records page, click Organization under the **Constituent** category. The Global Change - Organization screen appears. You can select the type of organization constituent attributes (address, constituent, etc.) you want to change in the **Available Fields** box.

Address Attributes

All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Constituent Attributes
Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interest

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Preferred Address Attributes

Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Participant

To globally change Participant attributes, from the Globally Change Records page, click Participant under the **Event** category. The Global Change - Participant screen appears. The Participant Attributes field category appears in the **Available Fields** box.

Participant Attributes

Participant Attributes

Available Fields	Valid Operations
Attributes	A, D

Dietary Preference

(Participant Attributes;Dietary Preference)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Handicap

(Participant Attributes;Handicap)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Partner Request

(Participant Attributes;Partner Request)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Seating Request

(Participant Attributes;Seating Requests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Shirt Size

(Participant Attributes;Shirt Size)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Shoe Size

(Participant Attributes;Shoe Size)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Source

(Participant Attributes;Source)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Special Requests

(Participant Attributes;Special Requests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Proposals

To globally change proposal record attributes, from the Globally Change Records page, click Proposal under the **Constituent** category. The Global Change - Proposal screen appears. The Proposal Attributes field category appears in the **Available Fields** box.

Proposal Attributes
Proposal Attributes

Available Fields	Valid Operations
Attributes	A, D

Relationships, Individual/Contact/Employee

To globally change individual, contact, and/or employee attributes, from the Globally Change Records page, click Individual/Contact/Employee Relationship under the **Constituent** category. The Global Change - Individual/Contact/Employee Relationship screen appears. You can select the type of relationship attribute (individual relationship or individual relationship address) in the **Available Fields** box.

Individual Relationship Address Attributes
Individual Relationship Address Attributes

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Individual Relationship Addresses;Individual Relationship Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Individual Relationship Addresses;Individual Relationship Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Individual Relationship Attributes
Individual Relationship Attributes

Available Fields	Valid Operations
Attributes	A, D

Contact As Of

(Individual Relationship Attributes;Contact As Of)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Interests

(Individual Relationship Attributes;Interests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Office Hours

(Individual Relationship Attributes;Office Hours)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Relationship Interests

(Individual Relationship Attributes;Relationship Interests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Relationships, Organization/Business

To globally change organization and/or business relationship attributes, from the Globally Change Records page, click Organization/Business Relationship under the **Constituent** category. The Global Change - Organization/Business Relationship screen appears. You can select the type of relationship attribute (organization relationship or organization relationship address) in the **Available Fields** box.

Organization Relationship Address Attributes
Organization Relationship Address Attributes

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed

(Organization Relationship Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Organization Relationship Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Relationship Attributes
Organization Relationship Attributes

Available Fields	Valid Operations
Attributes	A, D

Contact As Of

(Organization Relationship Attributes;Contact As Of)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Office Hours

(Organization Relationship Attributes;Office Hours)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Organization Type

(Organization Relationship Attributes;Organization Type)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Globally Delete

By selecting Attributes on the General tab of **Globally Delete Records**, you can globally delete attribute information. You can base the process on a number of filtering options.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for attributes.

Filtering Options
Attribute Type

Bank and Financial Information

You can globally add bank and financial information to constituent records.

Globally Add

The following table displays the type of bank/financial information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Bank/Financial Institution	You can access the Global Add - Bank/Financial Institution screen by clicking the **Bank Information** button on the Global Add screen. From the Global Add - Bank/Financial Institution screen, you can add a bank/financial institution relationship to selected constituent records. If on the Global Add - Bank/Financial Institution screen, you mark **Primary bank information**, the information is added as the constituent's primary bank/financial institution relationship (accessed by clicking the **Bank** button on the Bio 1 tab of the constituent record). If you do not mark **Primary bank information**, the bank is added as a relationship (accessed by selecting the Relationships tab on the constituent record).

Business/Organization Information

You can globally add and globally change business information contained in constituent records.

Globally Add

The following table displays the type of business information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Business	You can access the Global Add - Business screen by clicking the **Business Information** button on the Global Add screen. From the Global Add - Business screen, you can add a primary business relationship to all selected constituent records. The program will not override any existing primary business relationship. If a relationship already exists on the constituent record, an exception is generated.

Globally Change

The following tables display the type of business information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Organization under the **Constituent** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Valid Operations Key

Aliases

Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Addresses

All Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R

Available Fields	Valid Operations
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Valid Operations Key

All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Assigned Solicitor Relationships

Assigned Solicitor Relationship

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Valid Operations Key

Biographical

Biographical

Available Fields	Valid Operations
Constituent gives anonymously	A, R
Constituent has no valid addresses	A, R
Constituent ID	D, C, M
Constituent is honor/memorial	A, R
Constituent is inactive	A, R
Constituent is solicitor	A, R
Fiscal Year Starts	A, R, PR, D, C, S, M
Income	A, R, D, C, S, M
Industry	A, R, D, C, S, M
Match Notes	A, R, PR, D, C, S, M
Matching Factor	A, R, PR, D, C, S, M
Max Match Annual	A, R, D, I/D, C, S, M
Max Match Per Gift	A, R, D, I/D, C, S, M
Max Match Total	A, R, D, I/D, C, S, M
Min Match Annual	A, R, D, I/D, C, S, M
Min Match Per Gift	A, R, D, I/D, C, S, M
Min Match Total	A, R, D, I/D, C, S, M
Number of employees	A, R, D, I/D, C, S, M
Number of subsidiaries	A, R, D, I/D, C, S, M
Org matches Gifts	A, R
Org Name	A, R, PR, C, S
Receipt type	A, R, D
Requests no email	A, R
Solicit Code	A, D
Target	A, R, D, C, S, M

Constituent Appeals

Constituent Appeals

Available Fields	Valid Operations
Appeal	A, R, PR
Comments	A, R, PR, D
Date	A, R, D, I/D,
Response	A, R, D

Constituent Attributes

Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Valid Operations Key

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Valid Operations Key

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Constituent Codes

Constituent Codes

Available Fields	Valid Operations
Code	R

Available Fields	Valid Operations
Constituent Code	A, D
Date From	A, R, D
Date To	A, R, D

Valid Operations Key

Notepads

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Preferred Addresses

Preferred Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R

Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Valid Operations Key

NCOA Confirmed?

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Prospects

Prospects

Available Fields	Valid Operations
Classification	A, R, D
Status	A, R, D

Tributes

Tributes

Available Fields	Valid Operations
Date from	A, R, D
Date to	A, R, D
Default Fund	A, R, D
Description	A, R, PR, D
Gifts may be given to this tribute	A, R
Letter	A, R, D
Notes	A
Tribute Type	A, R

Volunteer Job Assignments

Volunteer Job Assignments

Available Fields	Valid Operations
Category	A, R, D
Day	A, R, D
Department	A, R, D
End Date	A, R, D, I/D
End Time	A, R, PR, D
Letter Sent	A, R
Letter Sent On	A, R, D, I/D
Location	A, R, D
Notes	A
Position	A, R, PR, D
Requested On	A, R, D I/D
Start Date	A, R, D, I/D
Start Time	A, R, PR, D
Status	A, R
Supervisor	A, R, PR, D
Task	A, R, D
Volunteer Type	A, R, D

Volunteers

Volunteers

Available Fields	Valid Operations
End Date	A, R, D
Reason Finished	A, R, PR, D
Start Date	A, R, D
Status	A, R
Volunteer Type	A, R, D

Campaigns

You can globally change campaign information.

Globally Change

The following tables display the type of campaign information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Campaign** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Campaign Attributes

Campaign Attributes

Available Fields	Valid Operations
Attributes	A, D

Campaign Manger

(Campaign Attributes;Campaign Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Major Donors Only?

(Campaign Attributes;Major Donors Only?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Campaigns

Campaigns

Available Fields	Valid Operations
Appeal ID	A, D
Campaign category	A, D, R, C, S, M
Campaign is inactive	A, R
End date	A, R, D, I/D, C, S, M
Fund ID	A, D
Limit Appeals	A, R
Limit Funds	A, R
Notes	A
Overall goal	A, R, D, I/D, C, S, M
Start date	A, R, D, I/D, C, S, M

Constituent Codes

You can globally add constituent codes to existing records in your database.

Globally Add

The following table displays the type of constituent code information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Constituent Code	You can access the Global Add - Constituent Code screen by clicking the **Constituent Code Information** button on the Global Add screen. From the Global Add - Constituent Code screen, you can add new code information. This information is added to the Constituent Code grid on the Bio 2 tab of the constituent record.

Constituent Records

You can globally change most information contained on a constituent record and you can globally delete constituent records, removing them from your database.

Globally Change

The following tables display the type of constituent record information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Constituent under the **Constituent** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Addressee/Salutations

Addressee/Salutations

Available Fields	Valid Operations
Additional Add/Sals	A, D
Primary Addressee ID	A, R, D
Primary Salutation ID	A, R, D

Aliases

Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Addresses

All Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R

Available Fields	Valid Operations
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Assigned Solicitor Relationships

Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Biographical

Biographical

Available Fields	Valid Operations
Birth date	A, R, D, C, S, M
Birthplace	A, R, PR, D, C, S, M
Constituent gives anonymously	A, R
Constituent has no valid addresses	A, R
Constituent ID	D, C, M
Constituent is honor/memorial	A, R
Constituent is inactive	A, R
Constituent is solicitor	A, R
Deceased	A, R
Deceased Date	A, R, D, C, S, M
Ethnicity	A, R, D, C, S, M
First Name	A, R, PR, D, C, S, M
Fiscal Year Status	A, R, PR, D, C, S, M
Gender	A, R, D
Income	A, R, D, C, S, M
Industry	A, R, D, C, S, M
Last Name	A, R, PR, C, S
Maiden name	A, R, PR, D, C, S, M
Marital status	A, R, D, C, S, M
Match Notes	A, R, PR, D, C, S, M
Matching Factor	A, R, PR, D, C, S, M
Max Match Annual	A, R, D, I/D, C, S, M
Max Match Per Gift	A, R, D, I/D, C, S, M
Max Match Total	A, R, D, I/D, C, S, M
Middle Name	A, R, PR, D, C, S, M
Min Match Annual	A, R, D, I/D, C, S, M
Min Match Per Gift	A, R, D, I/D, C, S, M
Min Match Total	A, R, D, I/D, C, S, M
Name	C
Nickname	A, R, PR, D, C, S, M
Number of employees	A, R, D, I/D, C, S, M
Number of subsidiaries	A, R, D, I/D, C, S, M
Org matches gifts	A, R
Receipt type	A, R, D

Available Fields	Valid Operations
Religion	A, R, D, C, S, M
Requests no email	A, R
Solicit Code	A, D
SSN(US) (* see note below)	D, C, M
Suffix 1	A, R, D, C, S, M
Suffix 2	A, R, D, C, S, M
Target	A, R, D, C, S, M
Title 1	A, R, D, C, S, M
Title 2	A, R, D, C, S, M

* **Security** settings determine ability to import this information. For more information, see the Security chapter in the *Configuration & Security Guide*.

Constituent Appeals

Constituent Appeals

Available Fields	Valid Operations
Appeal	R
Comments	A, R, PR, D
Date	A, R, D, I/D,
Response	A, R, D

Constituent Attributes

Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Constituent Codes

Constituent Codes

Available Fields	Valid Operations
Code	R
Constituent Code	A, D
Date From	A, R, D
Date To	A, R, D

Education Relationships

All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A

Available Fields	Valid Operations
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships

Primary Alumni Education Relationships

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Primary Alumni Attributes

(Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Primary Alumni Education Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Primary Alumni Education Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Primary Alumni Education Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Primary Alumni Education Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Primary Alumni Education Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Leadership Positions

(Primary Alumni Education Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reason Left?

(Primary Alumni Education Relationships;Primary Alumni Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Notepads

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Preferred Addresses

Preferred Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D

Available Fields	Valid Operations
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Prospects

Prospects

Available Fields	Valid Operations
Classification	A, R, D
Status	A, R, D

Tributes

Tributes

Available Fields	Valid Operations
Date from	A, R, D
Date to	A, R, D
Default Fund	A, R, D
Description	A, R, PR, D
Gifts may be given to this tribute	A, R
Letter	A, R, D
Notes	A
Tribute Type	A, R

Volunteer Job Assignment

Volunteer Job Assignments

Available Fields	Valid Operations
Category	A, R, D
Day	A, R, D
Department	A, R, D
End Date	A, R, D, I/D
End Time	A, R, PR, D
Letter Sent	A, R
Letter Sent On	A, R, D, I/D
Location	A, R, D
Notes	A, R, PR
Position	A, R, PR, D
Requested On	A, R, D I/D
Start Date	A, R, D, I/D
Start Time	A, R, PR, D
Status	A, R
Supervisor	A, R, PR, D
Task	A, R, D
Volunteer Type	A, R, D

Volunteers

Volunteers

Available Fields	Valid Operations
End Date	A, R, D
Reason Finished	A, R, PR, D
Start Date	A, R, D
Status	A, R
Volunteer Type	A, R, D

Globally Delete

Note: For information about creating a query of constituent records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Constituents on the General tab of **Globally Delete Records**, you can globally delete constituent records. You can base the process on a number of filtering options, or you can create a query of all constituent records you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table list the options available for constituent records.

Filtering Options
are active constituents
are business relationships
are contacts
are employees
are event participants
are honor/memorials
are primary alumni
are solicitors
are spouses
have current memberships
have gifts

Education/School Information

You can globally add and globally change education/school information.

Globally Add

The following table displays the type of education/school information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Education/School	You can access the Global Add - Education/School screen by clicking the **Education Information** button on the Global Add screen. From the Global Add - Education/School screen, you can add an education/school relationship to selected constituent records. If on the Global Add - Education/School screen, you mark **Primary alumni information**, the information is added as the constituent's primary education/school relationship (accessed by clicking the **Education** button on the Bio 1 tab of the constituent record). If you do not mark **Primary alumni information**, the school is added as a relationship (accessed by selecting the Relationships tab on the constituent record).

Globally Change

The following tables display the type of education/school information you can change in *The Raiser's Edge* using **Globally Change Records**. You can globally change education/school information in constituent or individual records.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

You can globally change education and school information in constituent and/or individual records.

Constituent Records

To globally change education information in your constituent records, from the Globally Change Records page, click Constituent under the **Constituent** category. The Global Change - Constituent screen appears. The Education/School Relationships field category appears in the **Available Fields** box.

Education/School Relationships
All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D

Available Fields	Valid Operations
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Valid Operations Key

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships
Primary Alumni Education Relationships

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D

Available Fields	Valid Operations
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comment	A, R, PR, D
Minor	A, R
Minor Comment	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Leadership Positions

(Education/School Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;Primary Alumni Attributes;Reason Left?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Individual Records

To globally change education information in your individual records, from the Globally Change Records page, click Individual under the **Constituent** category. The Global Change - Individual screen appears. The Education/School Relationships field category appears in the **Available Fields** box.

Education/School Relationships

All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comment	A, R, PR, D
Minor	A, R
Minor Comment	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reasons Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reasons Left?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships

Primary Alumni Education Relationships

(Education/School Relationships;Primary Alumni Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R. D

Leadership Positions

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reasons Left?

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Reasons Left?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Email

Using **Globally Add Records**, you can send email messages to a group of constituents.

Globally Add

In the following table the **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Email	You can send an email message to all or selected constituents. You compose your email message on the Email Message screen, which appears when you click the **Enter Email Now** button on the Global Add screen. The message is sent to selected constituents who have a valid email address entered in the **Phones/Email/Links** grid of their constituent record.

Events

You can globally change and delete event information.

The event fields available for global change are arranged in the following categories: Event and Participant. The specific fields available for global change are listed under each category.

Globally Change

The following tables display the type of event information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Event** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Event Records

To globally change event information, from the Globally Change Records page, click Event under the **Event** category. The Global Change - Event screen appears.

Attributes
Event Attributes

Available Fields	Valid Operations
Attributes	A, D

Chairperson

(Event Attributes;Chairperson)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Event Locale

(Event Attributes;Event Locale)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Event Success Rate

(Event Attributes;Event Success Rate)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Handicap Accessible?

(Event Attributes;Handicap Accessible?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Insurer

(Event Attributes;Insurer)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Prizes Donated

(Event Attributes;Prizes Donated)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Rain Location

(Event Attributes;Rain Location)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Notepads
Event Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Events
Events

Available Fields	Valid Operations
Capacity	A, R, I/D, C, S
Category	A, R
Description	A, R, PR, D, C, S, M
End Date	A, R, D, I/D, C, S, M
End Time	A, R, PR, D, C, S, M
Event ID	C
Goal	A, R, D, I/D, C, S, M
Group	A, R, D, C, S, M
Inactive	A, R
Itinerary description	A, R, PR, D, C, S, M
Location Address	A, R, PR, D, C, S, M
Location City	A, R, PR, D, C, S, M
Location Name	A, R, PR, D, C, S, M
Location Phone	A, R, PR, D, C, S, M
Location State	A, R, D, C, S, M
Location ZIP	A, R, PR, D, C, S, M
Name	A, R, PR, C, S
Number invited	A, R, I/D, C, S
Start Date	A, R, D, I/D, C, S, M
Start Time	A, R, PR, D, C, S, M
Type	A, R, D, C, S, M

Participant Records

To globally change event participant information, from the Globally Change Records page, click Participant under the **Event** category. The Global Change - Participant screen appears.

Attributes

Participant Attributes

Available Fields	Valid Operations
Attributes	A, D

Dietary Preference

(Participant Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Handicap

(Participant Attributes;Dietary Preference;Handicap)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Partner Request

(Participant Attributes;Dietary Preference;Partner Request)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Seating Requests

(Participant Attributes;Dietary Preference;Seating Requests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Shirt Size

(Participant Attributes;Dietary Preference;Shirt Size)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Shoe Size

(Participant Attributes;Dietary Preference;Shoe Size)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Source

(Participant Attributes;Dietary Preference;Source)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Special Requests

(Participant Attributes;Dietary Preference;Special Requests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Participants
Participants

Available Fields	Valid Operations
Attended	A, R
Do not seat	A, R
Invitation	A, R
Invite Date	A, R, D
Notes	A, R, PR, D
Participation	A, R, D
Registration	A, R
Registration Date	A, R, D
Response	A, R, D
Response Date	A, R, D
Solicitor	A, R, D
Status	A, R, D

Globally Delete

Note: For information about creating a query of event records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Events on the General tab of **Globally Delete Records**, you can globally delete events. You can base the process on a number of filtering options, or you can create a query of all events you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for event records.

Filtering Options
are active
have actions
have jobs
have participants
Delete events with these dates (enter **Start date** and **End date**)

Funds

You can globally change fund information.

Globally Change

The following tables display the type of fund information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Fund** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Attributes

Fund Attributes

Available Fields	Valid Operations
Attributes	A, D

Restrictions

(Fund Attributes;Restrictions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Funds

Funds

Available Fields	Valid Operations
Appeal ID	A, D
Campaign ID	A, D
End date	A, R, D, I/D, C, S, M
Fund category	A, R, D, C, S, M

Available Fields	Valid Operations
Fund is inactive	A, R
Fund Type	A, R, D, C, S, M
Limit Appeals	A, R
Limit Campaigns	A, R
Notes	A
Overall goal	A, R, D, I/D, C, S, M
Restricted	A, R
Start date	A, R, D, I/D, C, S, M

Gifts

You can globally change and delete gift information.

Globally Change

The following tables display the type of gift information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature using the **Gift** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Attributes

Gift Attributes

Available Fields	Valid Operations
Attributes	A, D

Adopt An Animal

(Gift Attributes;Adopt An Animal)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Auction ID

(Gift Attributes;Auction ID)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Auction Item

(Gift Attributes;Auction Item)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Beneficiary

(Gift Attributes;Beneficiary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Check routing

(Gift Attributes;Check routing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Declared Value

(Gift Attributes;Declared Value)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Deposit Date

(Gift Attributes;Deposit Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Donated By

(Gift Attributes;Donated By)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Donor Designation

(Gift Attributes;Donor Designation)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Gift transfer date

(Gift Attributes;Gift transfer date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Gift-in-Kind Type

(Gift Attributes;Gift-in-Kind Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Item Number

(Gift Attributes;Item Number)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Named Giving Opp

(Gift Attributes;Named Giving Opp)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Purchased By

(Gift Attributes;Purchased By)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Remainderman Fund

(Gift Attributes;Remainderman Fund)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reminder Sent

(Gift Attributes;Reminder Sent)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Sold On

(Gift Attributes;Sold On)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Source

(Gift Attributes;Source)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Gift Benefits

Gift Benefits

Available Fields	Valid Operations
Comments	A, R, PR, D
Count	A, R, D, I/D
Description	A, R, PR, D, C, S, M
Include benefit notes on receipt	A, R
Sent	A, R, D
Unit Cost	A, R, I/D

Gifts

Gifts

Available Fields	Valid Operations
Acknowledge	A, R
Acknowledge date	A, R, D, C, S, M
Amount	A, R, I/D, C, S
Amount bills	A, R, I/D, C, S
Amount coins	A, R, I/D, C, S
Anonymous	A, R
Appeal ID	A, R, D
Authorization code	A, R, PR, D, C, S, M
Bank	D
Campaign ID	A, R, D
Cardholder name	A, R, PR, D, C, S, M
Check date	A, R, D, C, S, M
Check number	A, R, PR, D, C, S, M
Constituency	A, R, D, C, S, M
Credit card expires	A, R, D, C, S, M
Credit card number *(see note below)	A, R, PR, D, C, S, M
Credit card type	D
Date	A, R, I/D, C, S
Direct debit received	A, R
EFT	A, R
Fund ID	A, R
Gift code	A, R, D, C, S, M
Gift status date	A, R, D, C, S, M
Letter code	A, R,D, C, S, M
Membership amount to apply	A, R, I/D
Pay method	A, R
Post date	A, R, I/D,C, S
Post status	A, R
Prenotification units	A, R, D I/D, C, S, M
Receipt	A, R
Receipt amount	A, R, I/D, C, S
Receipt date	A, R, D, C, S, M
Receipt number	A, R, D, I/D, C, S, M
Reference	A, R, PR, D, C, S, M

Available Fields	Valid Operations
Reference date	A, R, D, C, S, M
Reference number	A, R, PR, D, C, S, M
Registration fees amount to apply	A, R, I/D
Sale of stock date	A, R, D, I/D, C, S, M
Send prenotification	A, R
Send reminders	A, R
Solicitor	A, D
Status	A, R
Stock issuer	A, R, PR, D, C, S, M
Stock sale broker fee	A, R, I/D, C, S
Stock sale notes	A, R, PR, D, C, S, M
Stock sale post date	A, R, D I/D, C, S, M
Stock sale post status	A, R
Subtype	A, R, D, C, S, M

*Security settings determine ability to import this information. For more information, see the Security chapter in the *Configuration & Security Guide*.

Honor/Memorials

Honor/Memorials

Available Fields	Valid Operations
Acknowledge	A, R
Tribute Type	A, R, D

Notes

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Globally Delete

Note: For information about creating a query of gift records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Gifts on the General tab of **Globally Delete Records**, you can globally delete gift records. You can base the process on a number of filtering options, or you can create a query of all gifts you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for gift records.

Filtering Options
are acknowledged
are linked to an event
are linked to an honor/memorial
are linked to a membership
are linked to a proposal
are posted
are receipted
are recurring gifts with transactions
are sold stock/property
are split between funds
have adjustments applied
have a matching gift pledge
have pledge payments applied
have soft credits
have write-offs applied
Delete gifts with these dates (**Gift date**, **Gift added**)

Individual Constituent Record

You can globally change most information contained on an individual constituent record.

Globally Change

The following tables display the type of individual constituent record information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Individual under the **Constituent** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Addressee/Salutations

Addressee/Salutations

Available Fields	Valid Operations
Add/Sal ID	A, R
Add/Sal Type	A, R

Aliases

Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Addresses

All Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Assigned Solicitor Relationships

Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Biographical

Biographical

Available Fields	Valid Operations
Birth date	A, R, D, C, S, M
Birthplace	A, R, PR, D, C, S, M
Constituent gives anonymously	A, R
Constituent has no valid addresses	A, R
Constituent ID	D, C, M
Constituent is honor/memorial	A, R
Constituent is inactive	A, R
Constituent is solicitor	A, R
Deceased	A, R
Deceased Date	A, R, D, C, S, M

Available Fields	Valid Operations
Ethnicity	A, R, D, C, S, M
First Name	A, R, PR, D, C, S, M
Gender	A, R, D
Income	A, R, D, C, S, M
Last Name	A, R, PR, C, S
Maiden name	A, R, PR, D, C, S, M
Marital status	A, R, D, C, S, M
Middle Name	A, R, PR, D, C, S, M
Name	C
Nickname	A, R, PR, D, C, S, M
Primary Addressee ID	A, R, D
Primary Salutation ID	A, R, D
Receipt type	A, R, D
Religion	A, R, D, C, S, M
Requests no email	A, R
SSN(US) * (see note below)	D, C, M
Solicit code	A, D
Suffix 1	A, R, D, C, S, M
Suffix 2	A, R, D, C, S, M
Target	A, R, D, C, S, M
Title 1	A, R, D, C, S, M
Title 2	A, R, D, C, S, M

***Security** settings determine ability to import this information. For more information, see the Security chapter in the *Configuration & Security Guide*.

Constituent Appeals

Constituent Appeals

Available Fields	Valid Operations
Appeal	A, R
Comments	A, R, PR, D
Date	A, R, D, I/D,
Response	A, R, D

Constituent Attributes

Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Constituent Codes

Constituent Codes

Available Fields	Valid Operations
Code	R
Constituent Code	A, D
Date From	A, R, D
Date To	A, R, D

Education/School Relationships

All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships

(Education/School Relationships;Primary Alumni Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R

Available Fields	Valid Operations
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R

Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D
School name	A, R
Status	A, R, D
Type	A, R, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Leadership Positions

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes;Reason Left)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Notes

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Preferred Addresses

Preferred Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Prospects

Prospects

Available Fields	Valid Operations
Classification	A, R, D
Status	A, R, D

Tributes

Tributes

Available Fields	Valid Operations
Date from	A, R, D
Date to	A, R, D
Default Fund	A, R, D
Description	A, R, PR, D
Gifts may be given to this tribute	A, R
Letter	A, R, D
Notes	A
Tribute Type	A, R

Volunteer Job Assignments

Volunteer Job Assignments

Available Fields	Valid Operations
Category	A, R, D
Day	A, R, D
Department	A, R, D
End Date	A, R, D, I/D
End Time	A, R, PR, D
Letter Sent	A, R
Letter Sent On	A, R, D, I/D
Location	A, R, D
Notes	A, R, PR
Position	A, R, PR, D

Available Fields	Valid Operations
Requested On	A, R, D I/D
Start Date	A, R, D, I/D
Start Time	A, R, PR, D
Status	A, R
Supervisor	A, R, PR, D
Task	A, R, D
Volunteer Type	A, R, D

Volunteers

Volunteers

Available Fields	Valid Operations
End Date	A, R, D
Reason Finished	A, R, PR, D
Start Date	A, R, D
Status	A, R
Volunteer Type	A, R, D

Jobs

You can globally change and delete volunteer job assignments.

Globally Change

The following tables display the type of volunteer job information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Job under the **Job** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Attributes

Job Attributes

Available Fields	Valid Operations
Attributes	A, D

Education Level

(Job Attributes;Education Level)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Location Type

(Job Attributes;Location Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Jobs

Jobs

Available Fields	Valid Operations
Allow Mandate	A, R
Assignment interest	A, R, D
Category	A, R, D, C, S, M
Checklist item	A, R, D
Completed	A, R
Description	A, R, PR, D, C, S, M
End Date	A, R, D, I/D, C, S, M
Job	A, R, PR,C, S
Minimum Age	A, R, D, I/D, C, S, M
Position	A, R, PR, D, C, S, M
Start Date	A, R, D, I/D, C, S, M
Volunteer Type	A, R, D, C, S, M

Globally Delete

Note: For information about creating a query of jobs you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Volunteer Job Assignments on the General tab of **Globally Delete Records**, you can globally delete volunteer job assignments. You can base the process on a number of filtering options, or you can create a query of all jobs you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for jobs.

Filtering Options
Start date (date)
End date (date)
Date added (date)
Status

Memberships

You can globally add, globally change, and globally delete membership information.

Globally Add

The following table displays the type of membership information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Membership	You can access the Global Add - Membership screen by clicking the **Membership Information** button on the Global Add screen. From the Global Add - Membership screen, you can add membership information, including category, dues amount, expiration information, membership cards needed, and more to all selected constituent records. The information is added to the Membership tab of the constituent record.

Globally Change

The following tables display the type of membership information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Membership under the **Membership** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Attributes

Membership Attributes

Available Fields	Valid Operations
Attributes	A, D

Valid Operations Key

 # Day Passes

(Membership Attributes;# Day Passes)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Exhibit Interests

(Membership Attributes;Exhibit Interests)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Holiday Gift?

(Membership Attributes;Holiday Gift)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R,

Membership Sponsor

(Membership Attributes;Membership Sponsor)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Purchase Location

(Membership Attributes;Purchase Location)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Membership Benefits

Membership Benefits

Available Fields	Valid Operations
Benefits Notes	A
Comments	A, R, PR, D
Count	A, R, D, I/D
Send Benefits To	A, R
Sent	A, R, D
Unit Cost	A, R, I/D
Waive Benefits	A, R

Valid Operations Key

Memberships

Memberships

Available Fields	Valid Operations
Category	A, R
Dues	A, R, D, I/D
Expires on	A, R, D, I/D
Lifetime membership	A, R
Notes	A
Print Renewals	A, R
Program	A, R, D
Subcategory	A, R, D
Transaction date	A, R, I/D

Globally Delete

Note: For information about creating a query of membership records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Memberships on the General tab of **Globally Delete Records**, you can globally delete memberships. You can base the process on a number of filtering options, or you can create a query of all memberships you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for membership records.

Filtering Options
Current membership lapsed (date)
Membership expires (date)
Membership category
Membership sub-category
Membership program
Do not delete lifetime memberships (yes;no)
Do not delete memberships linked to gifts (yes;no)

Notes

You can globally add, globally change, and globally delete notes.

Globally Add

The following table displays the type of note information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **Record Type** column displays the type of record to which you can add a note; the **Data**

Available column displays what exactly you can add.

Record Type	Data Available
Actions	To globally add notes to existing action records, from the Global Add screen, select "Notepad" in the **Add** field. Click the **Include** button and select "All Actions" to add this note to all action records in your database. To add the note to selected records, select "Selected" and select the action query you want to use. To create the note, click the **Notepad Information** button on the Global Add screen. The Notepad screen appears, and you can add date, type, description, title, and author information along with the new note. The information is added to the Notes tab of the action record.
Constituents	To globally add notes to existing constituent records, from the Global Add screen, select "Notepad" in the **Add** field. Click the **Include** button and select "All Constituents" to add this note to all constituent records in your database. To add the note to selected records, select "Selected" and select the constituent query you want to use. To create the note, click the **Notepad Information** button on the Global Add screen. The Notepad screen appears, and you can add date, type, description, title, and author information along with the new note. The information is added to the Notes tab of the constituent record.

Record Type	Data Available
Events	To globally add notes to existing event records, from the Global Add screen, select "Notepad" in the **Add** field. Click the **Include** button and select "All Events" to add this note to all event records in your database. To add the note to selected records, select "Selected" and select the event query you want to use. To create the note, click the **Notepad Information** button on the Global Add screen. The Notepad screen appears, and you can add date, type, description, title, and author information along with the new note. The information is added to the Notes tab of the event record.
Gifts	To globally add notes to existing gift records, from the Global Add screen, select "Notepad" in the **Add** field. Click the **Include** button and select "All Gifts" to add this note to all gift records in your database. To add the note to selected records, select "Selected" and select the gift query you want to use. To create the note, click the **Notepad Information** button on the Global Add screen. The Notepad screen appears, and you can add date, type, description, title, and author information along with the new note. The information is added to the Notes tab of the gift record.
Proposal	To globally add notes to existing proposal records, from the Global Add screen, select "Notepad" in the **Add** field. Click the **Include** button and select "All Proposals" to add this note to all proposal records in your database. To add the note to selected records, select "Selected" and select the proposal query you want to use. To create the note, click the **Notepad Information** button on the Global Add screen. The Notepad screen appears, and you can add date, type, description, title, and author information along with the new note. The information is added to the Notes tab of the proposal record.

Globally Change

You can globally change notes in a number of areas in *The Raiser's Edge*. The following tables display the type of note information you can change.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

You access this feature in various locations in **Globally Change Records**, depending on the area of the program in which you want to change note information. For example, if you want to change notes in your action records, you must open the **Action** category on the Globally Change Records page. The Action Notepad field category appears in the **Available Fields** box on the Global Change - Action screen.

Action Records

To globally change action notes, from the Globally Change Records page, click Action under the **Action** category. The Global Change - Action screen appears. The Action notepads field category appears in the **Available Fields** box.

Notes
Action Notepads

Available Fields	Valid Operations
Author	A, R, PR, D
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Constituent Records

To globally change constituent notes, from the Globally Change Records page, click Constituent under the **Constituent** category. The Global Change - Constituent screen appears. The Notepads field category appears in the **Available Fields** box.

Notes
Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Event Records

To globally change event notes, from the Globally Change Records page, click Event under the **Event** category. The Global Change - Event screen appears. The Event Notepads field category appears in the **Available Fields** box.

Notes
Event Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Valid Operations Key

Gift Records

To globally change gift notes, from the Globally Change Records page, click Gift under the **Gift** category. The Global Change - Gift screen appears. The Notepads field category appears in the **Available Fields** box.

Notes

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Individual Records

To globally change individual constituent notes, from the Globally Change Records page, click Individual under the **Constituent** category. The Global Change - Individual screen appears. The Notepads field category appears in the **Available Fields** box.

Notes

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Valid Operations Key

Organization Records

To globally change organization constituent notes, from the Globally Change Records page, click Organization under the **Constituent** category. The Global Change - Organization screen appears. The Notepads field category appears in the **Available Fields** box.

Notes
Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Proposal Records

To globally change notes entered on a proposal record. From the Globally Change Records page, click Proposal under the **Constituent** category. The Global Change - Proposal screen appears. The Proposal notepads field category appears in the **Available Fields** box.

Notes
Proposal Notepads

Available Fields	Valid Operations
Author	A, R, PR, D
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Globally Delete

You can globally delete notes in action, constituent, event, gift, and proposal records.

Action Records

By selecting Notepads - Actions on the General tab of **Globally Delete Records**, you can globally delete notes from action records. You can base the process on a number of filtering options, or you can create a query of all action records you want to include.

Note: For information about creating a query, see the Query chapter of the *Query & Export Guide*.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for action record notes.

Filtering Options
Email
Appeal Action Notes
Constituent Contact Notes
Event Action Notes
Finance Notes
Location Notes
Lunch Meeting Notes
Mailing Notes
Media Notes
Meeting Notes
Proposal Notes
Prospect Notes
RE 7 Conversion
Solicitor Notes
Visit Notes
Volunteer Notes
Note date (date)
Note added (date)

Constituent Records

By selecting Notepads - Constituents on the General tab of **Globally Delete Records**, you can globally delete notes from constituent records. You can base the process on a number of filtering options, or you can create a query of all constituent records you want to include.

> **Note**: For information about creating a query, see the Query chapter of the *Query & Export Guide*.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for constituent record notes.

Filtering Options
Address Changes
Alumni Notes
Biographical
Capital Campaign
Career
Confidential
Director's Notes
Financial

Filtering Options
Personal
Planned Giving
Possible Solicitations
Prospect
Source
Note date (date)
Note added (date)

Event Records

By selecting Notepads - Events on the General tab of **Globally Delete Records**, you can globally delete notes from event records. You can base the process on a number of filtering options, or you can create a query of all event records you want to include.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for event record notes.

Filtering Options
Agenda
Alternate Location Information
Location Notes
Participant Notes
Prospect Notes
Volunteer Notes
Note date (date)
Note added (date)

Gift Records

By selecting Notepads - Gifts on the General tab of **Globally Delete Records**, you can globally delete notes from gift records. You can base the process on a number of filtering options, or you can create a query of all gift records you want to include.

> **Note**: For information about creating a query, see the Query chapter of the *Query & Export Guide*.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for gift record notes.

Filtering Options
Catalog Description
Event Information
Large Donation
Payroll Giving
Planned Giving

Filtering Options
Property
RE 7.0 Gift Conversion
Solicitation Information

Proposal Records

By selecting Notepads - Proposals on the General tab of **Globally Delete Records**, you can globally delete notes from proposal records. You can base the process on a number of filtering options, or you can create a query of all proposal records you want to include.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for proposal record notes.

Filtering Options
RE 7 Conversion

Organization

You can globally change organization information.

Globally Change

The following tables display the type of organization information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Organization under the **Constituent** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Aliases

Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Addresses

All Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,

Available Fields	Valid Operations
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

All Address Attributes

(All Addresses;All Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(All Addresses;All Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(All Addresses;All Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Assigned Solicitor Relationships

Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Biographical

Biographical

Available Fields	Valid Operations
Constituent gives anonymously	A, R
Constituent has no valid addresses	A, R
Constituent ID	D, C, M
Constituent is honor/memorial	A, R
Constituent is inactive	A, R
Constituent is solicitor	A, R
Fiscal Year Starts	A, R, PR, D, C, S, M
Income	A, R, D, C, S, M
Industry	A, R, D, C, S, M
Match Notes	A, R, PR, D, C, S, M
Matching Factor	A, R, PR, D, C, S, M
Max Match Annual	A, R, D, I/D, C, S, M
Max Match Per gift	A, R, D, I/D, C, S, M
Max Match Total	A, R, D, I/D, C, S, M
Min Match Annual	A, R, D, I/D, C, S, M
Min Match Per Gift	A, R, D, I/D, C, S, M
Min Match Total	A, R, D, I/D, C, S, M
Number of employees	A, R, D, I/D, C, S, M
Number of subsidiaries	A, R, D, I/D, C, S, M
Org matches Gifts	A, R
Org Name	A, R, PR, C, S
Receipt type	A, R, D

Available Fields	Valid Operations
Requests no email	A, R
Solicit Code	A, D
Target	A, R, D, C, S, M

Constituent Appeals

Constituent Appeals

Available Fields	Valid Operations
Appeal	A, R, PR
Comments	A, R, PR, D
Date	A, R, D, I/D,
Response	A, R, D

Constituent Attributes

Constituent Attributes

Available Fields	Valid Operations
Attributes	A, D

of Family Members

(Constituent Attributes;# of Family Members)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Anniversary

(Constituent Attributes;Anniversary)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Availability

(Constituent Attributes;Availability)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Business Hours

(Constituent Attributes;Business Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Closing Codes

(Constituent Attributes;Closing Codes)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Committees

(Constituent Attributes;Committees)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dietary Preference

(Constituent Attributes;Dietary Preference)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Donor Category

(Constituent Attributes;Donor Category)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Inactive

(Constituent Attributes;Inactive)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Interests

(Constituent Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization Type

(Constituent Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Origin

(Constituent Attributes;Origin)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Retirement Date

(Constituent Attributes;Retirement Date)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Special Mailing Types

(Constituent Attributes;Special Mailing Types)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Staff Manager

(Constituent Attributes;Staff Manager)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Constituent Codes

Constituent Codes

Available Fields	Valid Operations
Code	R
Constituent Code	A, D
Date From	A, R, D
Date To	A, R, D

Notes

Notepads

Available Fields	Valid Operations
Author	A, R, PR
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Preferred Addresses

Preferred Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Region	A, R, D
Seasonal Address	A, R
Seasonal From	A, R, PR, D

Available Fields	Valid Operations
Seasonal To	A, R, PR, D
Send Mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Preferred Address Attributes

(Preferred Addresses;Preferred Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Preferred Addresses;Preferred Address Attributes;NCOA Confirmed)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Preferred Addresses;Preferred Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Prospects

Prospects

Available Fields	Valid Operations
Classification	A, R, D
Status	A, R, D

Tributes

Tributes

Available Fields	Valid Operations
Date from	A, R, D
Date to	A, R, D
Default Fund	A, R, D
Description	A, R, PR, D

Available Fields	Valid Operations
Gifts may be given to this tribute	A, R
Letter	A, R, D
Notes	A
Tribute Type	A, R

Volunteer Job Assignments

Volunteer Job Assignments

Available Fields	Valid Operations
Category	A, R, D
Day	A, R, D
Department	A, R, D
End Date	A, R, D, I/D
End Time	A, R, PR, D
Letter Sent	A, R
Letter Sent On	A, R, D, I/D
Location	A, R, D
Notes	A
Position	A, R, PR, D
Requested On	A, R, D I/D
Start Date	A, R, D, I/D
Start Time	A, R, PR, D
Status	A, R
Supervisor	A, R, PR, D
Task	A, R, D
Volunteer Type	A, R, D

Volunteers

Volunteers

Available Fields	Valid Operations
End Date	A, R, D
Reason Finished	A, R, PR, D
Start Date	A, R, D
Status	A, R
Volunteer Type	A, R, D

Proposals

You can globally add, globally change, and globally delete proposal information.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Proposal	You can access the Global Add - Proposal screen by clicking the **Proposal Information** button on the Global Add screen. From the Global Add - Proposal screen, you can add a new proposal record.

Globally Change

The following tables display the type of proposal information you can change in *The Raiser's Edge* using **Globally Change Records**. You access this feature by clicking Proposal under the **Constituent** category on the Globally Change Records page.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

Attributes

Proposal Attributes

Available Fields	Valid Operations
Attributes	A, D

Notes

Proposal Notepads

Available Fields	Valid Operations
Author	A, R, PR, D
Date	A, R
Description	A, R, PR, D
Title	A, R, PR, D
Type	A, R

Proposals

Proposals

Available Fields	Valid Operations
Amount Asked	A, R, D, I/D
Amount Expected	A, R, D, I/D
Amount Funded	A, R, D, I/D
Campaign	A, R, D
Date Asked	A, R, D, I/D
Date Expected	A, R, D, I/D
Date Funded	A, R, D, I/D
Date Rated	A, R, D, I/D
Deadline	A, R, D, I/D
Fund	A, R, D
Inactive	A, R
Instrument	A, R, D
Notes	A, R, PR, D
Proposal Name	A, R, PR
Purpose	A, R, D
Rating	A, R, D
Reason	A, R, D
Status	A, R, D
Type of gift	A, R, D

Globally Delete

Note: For information about creating a query of proposal records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Proposals on the General tab of **Globally Delete Records**, you can globally delete proposal information. You can base the process on a number of filtering options, or you can create a query of all proposal records you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for proposal records.

Filtering Options
Proposal deadline (date)
Date asked (date)
Proposal purpose
Proposal fund

Filtering Options
Proposal status
Do not delete active proposals (yes;no)
Do not delete proposals linked to gifts (yes;no)

Prospect Ratings

You can globally delete prospect ratings from constituent records.

Globally Delete

> **Note**: For information about creating a query of records you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Prospect Ratings on the General tab of **Globally Delete Records**, you can globally delete ratings information. You can base the process on a number of filtering options, or you can create a query of all records you want to include.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for prospect ratings.

Filtering Options
Source
Category
Date (date)

Guests for an Event

You can globally add quests to existing event records in your database.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Guests for an Event	You can access the Global Add - Guest screen by clicking the **Guest Information** button on the Global Add screen. From the Global Add - Guest screen, you can add new guest or information

Registrants for an Event

You can globally add registrants for an event to existing event records in your database.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Registrants for an Event	You can access the Global Add - Registrant screen by clicking the **Registrant Information** button on the Global Add screen. From the Global Add - Registrant screen, you can add new registrant information

Relationships

You can globally change and globally delete relationship information.

Globally Change

The following tables display the type of relationship information you can change in *The Raiser's Edge* using **Globally Change Records**.

In the tables below, the **Available Fields** column displays the *Raiser's Edge* field you can change. The **Valid Operations** column lists all the change operations you can perform on that field.

You access this feature in various locations in **Globally Change Records**, depending on the area of the program in which you want to change relationship information. For example, if you want to change the assigned solicitor releationship in your organization constituent records, you must click organization under the **Constituent** category on the Globally Change Records page. The Assigned Solicitor Relationships field category appears in the **Available Fields** box on the Global Change - Organization screen.

Constituent Records

To globally change relationship information, from the Globally Change Records page, click Constituent under the **Constituent** category. The Global Change - Constituent screen appears. From this screen, using the **Available Fields** box, you can change Assigned Solicitor Relationships, Primary Alumni Relationships, and All Education Relationships.

Education/School Relationships
All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D

Available Fields	Valid Operations
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships

(Education/School Relationships;Primary Alumni Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R

Available Fields	Valid Operations
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R
School name	A, R
Status	A, R, D
Type	A, R, D

Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R. D

Leadership Positions

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reasons Left?

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Attributes;Reasons Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Assigned Solicitor Relationship
Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Individual Records

To globally change relationship information on individual constituent records, from the Globally Change Records page, click Individual under the **Constituent** category. The Global Change - Individual screen appears. From this screen, using the **Available Fields** box, you can change Assigned Solicitor Relationships, Education/School Relationships, and Primary Alumni School Relationships.

Assigned Solicitor Relationships
Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Education/School Relationships
All Education Relationships

(Education/School Relationships;All Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R

Available Fields	Valid Operations
School name	A, R
Status	A, R, D
Type	A, R, D

Education Attributes

(Education/School Relationships;All Education Relationships;Education Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;All Education Relationships;Education Attributes;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R

Athletics

(Education/School Relationships;All Education Relationships;Education Attributes;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Awards

(Education/School Relationships;All Education Relationships;Education Attributes;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Clubs

(Education/School Relationships;All Education Relationships;Education Attributes;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;All Education Relationships;Education Attributes;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Leadership Positions

(Education/School Relationships;All Education Relationships;Education Attributes;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, PR, D

Reason Left?

(Education/School Relationships;All Education Relationships;Education Attributes;Reason Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, I/D, D
Description	A, R, D

Primary Alumni Education Relationships

(Education/School Relationships;Primary Alumni Education Relationships)

Available Fields	Valid Operations
Campus	A, R, PR, D
Class of	A, R, PR, D
Date entered	A, R, D
Date graduated	A, R, D
Date left	A, R, D
Degree	A, R, D
Frat/Sorority	A, R, PR, D
GPA	A, R, PR, D
Known name	A, R, PR, D
Major	A, R
Major Comments	A, R, PR, D
Minor	A, R
Minor Comments	A, R, PR, D
Notes	A
Primary alum info	A, R

Available Fields	Valid Operations
School name	A, R
Status	A, R, D
Type	A, R, D

Primary Alumni Attributes

(Education/School Relationships;Primary Alumni Education Relationships;Primary Alumni Attributes)

Available Fields	Valid Operations
Attributes	A, D

Alumni Sponsor

(Education/School Relationships;Primary Alumni Education Relationships;Alumni Sponsor)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Athletics

(Education/School Relationships;Primary Alumni Education Relationships;Athletics)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Awards

(Education/School Relationships;Primary Alumni Education Relationships;Awards)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Clubs

(Education/School Relationships;Primary Alumni Education Relationships;Clubs)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Dorms/Housing

(Education/School Relationships;Primary Alumni Education Relationships;Dorms/Housing)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R. D

Leadership Positions

(Education/School Relationships;Primary Alumni Education Relationships;Leadership Positions)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Reasons Left?

(Education/School Relationships;Primary Alumni Education Relationships;Reasons Left?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Organization/Business Relationship Records

To globally change relationship information on your organization/business releationship constituent records, from the Globally Change Records page, click Organization/Business Relationship under the **Constituent** category. The Global Change - Organization/Business Relationship screen appears. From this screen, using the **Available Fields** box, you can change Organization/Business Relationship Addresses, Organization/Business Relationship Aliases, Organization/Business Relationship Attributes, and Organization/Business Relationship.

Valid Operations Key

Addresses

Organization Relationship Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D

Available Fields	Valid Operations
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Preferred address	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Organization Relationship Address Attributes

(Organization Relationship Addresses;Organization Relationship Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

NCOA Confirmed?

(Organization Relationship Addresses;Organization Relationship Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

(Organization Relationship Addresses;Organization Relationship Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Aliases

Organization Relationship Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Attributes

Organization Relationship Attributes

Available Fields	Valid Operations
Attributes	A, D

Contact As Of

(Organization Relationship Attributes;Contact As Of)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Office Hours

(Organization Relationship Attributes;Office Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Organization Type

(Organization Relationship Attributes;Organization Type)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Valid Operations Key

Organization/Business Relationships

Organization/Business Relationships

Available Fields	Valid Operations
Contact Type	A, R, D
Date From	A, R, D
Date To	A, R, D
Do Not Mail	A, R
Fiscal year starts	A, R, PR, D
Hon Mem Acknowledge	A, R
Income	A, R, D
Industry	A, R, D
Is Contact	A, R

Available Fields	Valid Operations
Is Employee	A, R
Is Primary	A, R
Match Notes	A, R, PR, D
Matching Factor	A, R, PR, D
Max Match Annual	A, R, D, I/D
Max Match Per Gift	A, R, D, I/D
Max Match Total	A, R, D, I/D
Min Match Annual	A, R, D, I/D
Min Match Per Gift	A, R, D, I/D
Min Match Total	A, R, D, I/D
Notes	A
Org matches gifts	A, R
Org Name	A, R, PR, D
Position	A, R, PR, D
Print Org	A, R
Print Position	A, R
Profession	A, R, D
Reciprocal	A, R, D
Relationship	A, R, D
Soft credit gifts	A, R

Organization Relationship Records

To globally change relationship information on your organization constituent records, from the Globally Change Records page, click Organization under the **Constituent** category. The Global Change - Organization screen appears. From this screen, using the **Available Fields** box, you can change Assigned Solicitor Relationship.

Assigned Solicitor Relationships
Assigned Solicitor Relationships

Available Fields	Valid Operations
Amount	A, R, D, I/D
Assigned Solicitors	A, D
Campaign ID	A, R, D
Date From	A, R, D
Date To	A, R, D
Fund ID	A, R, D
Notes	A
Solicitor Type	A, R, D

Individual/Contact/Employee Relationship

To globally change individual/contact/employee releationship information, from the Globally Change Records page, click Individual/Contact/Employee Relation under the **Constituent** category. The Global Change - Individual/Contact/Employee Relationship screen appears. From this screen, using the **Available Fields** box, you can change Individual/Contact/Employee Relation, Individual Relationship Addressees/Salutations, Individual Relationship Addresses, Individual Relationship Address Attributes, Individual Relationship Aliases, and Individual Relationship Attributes.

Individual Relationship Addressee/Salutations
Individual Relationship Addr/Sals

Available Fields	Valid Operations
Add/Sal ID	A, R
Add/Sal Type	A, R

Addresses
Individual Relationship Addresses

Available Fields	Valid Operations
Address lines	A, R, PR, D
CART	A, R, PR, D
City	A, R, PR, D
Country	A, R, D
County	A, R, D
Date from	A, R, D, I/D,
Date to	A, R, D, I/D
DPC	A, R, PR, D
Info source	A, R, D
LOT	A, R, PR, D
NZ City	A, R, D
NZ Suburb	A, R, D
Phone number	A, R, PR, D
Phone type	A, R
Preferred address	A, R
Region	A, R, D
Seasonal address	A, R
Seasonal from	A, R, PR, D
Seasonal to	A, R, PR, D
Send mail	A, R
State	A, R, D
Type	A, R
ZIP	A, R, PR, D

Individual Relationship Address Attributes

Individual Relationship Addresses;Individual Relationship Address Attributes)

Available Fields	Valid Operations
Attributes	A, D

Valid Operations Key

NCOA Confirmed?

Individual Relationship Addresses;Individual Relationship Address Attributes;NCOA Confirmed?)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R

Special Mailing Info

Individual Relationship Addresses;Individual Relationship Address Attributes;Special Mailing Info)

Available Fields	Valid Operations
Comment	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Aliases
Individual Relationship Aliases

Available Fields	Valid Operations
Alias Name	A, R, PR
Alias Type	A, R, D

Attributes
Individual Relationship Attributes

Available Fields	Valid Operations
Attributes	A, D

Contact As Of

(Individual Relationship Attributes;Contact As Of)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D, I/D

Interests

(Individual Relationship Attributes;Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Office Hours

(Individual Relationship Attributes;Office Hours)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, PR, D

Valid Operations Key

Relationship Interests

(Individual Relationship Attributes;Relationship Interests)

Available Fields	Valid Operations
Comments	A, R, PR, D
Date	A, R, D, I/D
Description	A, R, D

Individual/Contact/Employee/Relationship
Individual/Contact/Employee Relationship

Available Fields	Valid Operations
Automatically soft credit gifts	A, R
Birth date	A, R, D
Contact Type	A, R, D
Date From	A, R, D
Date To	A, R, D
Deceased	A, R
Deceased Date	A, R, D
Do not mail to contact	A, R
First Name	A, R, PR, D
Gender	A, R, D
Hon Mem Acknowledge	A, R
Is Contact	A, R
Is Employee	A, R
Is head of household	A, R

Available Fields	Valid Operations
Is Primary	A, R
Is Spouse	A, R
Last Name	A, R, PR
Maiden name	A, R, PR, D
Middle Name	A, R, PR, D
Nickname	A, R, PR, D
Notes	A
Position	A, R, PR, D
Primary Addressee ID	A, R, D
Primary Salutation ID	A, R, D
Print Org	A, R
Print Position	A, R
Profession	A, R, D
Reciprocal	A, R, D
Relationship	A, R, D
SSN * (see note below)	A, R, PR, D
Suffix 1	A, R, D
Suffix 2	A, R, D
Title 1	A, R, D
Title 2	A, R, D

***Security** settings determine ability to import this information. For more information, see the Security chapter in the *Configuration & Security Guide*.

Globally Delete

Note: For information about creating a query of relationships you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Relationships on the General tab of **Globally Delete Records**, you can globally delete relationship information. You can base the process on a number of filtering options, or you can create a query of all relationships you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for relationships.

Filtering Options
are linked constituents
are honor/memorial acknowledgees
are business relationships
are contacts

Filtering Options
are employees
are matching gift organizations
are spouses

Sponsors for an Event

You can globally add sponsors for an event to existing event records in your database.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Sponsors for an Event	You can access the Global Add - Sponsor screen by clicking the **Sponsor Information** button on the Global Add screen. From the Global Add - Sponsor screen, you can add new sponsor information

Tributes

You can globally delete tribute information.

Globally Delete

> **Note:** For information about creating a query of tributes you want to delete from your database, see the Query chapter of the *Query & Export Guide*.

By selecting Tributes on the General tab of **Globally Delete Records**, you can globally delete tributes. You can base the process on a number of filtering options, or you can create a query of all tributes you want to delete.

All filtering options appear on the Delete Options tab in **Globally Delete Records**. The following table lists the options available for tributes.

Filtering Options
Date from (date)
Date to (date)
Tribute type
Do not delete tributes that are active (yes;no)
Do not delete tributes with gifts given (yes;no)

Volunteer Award

You can globally add volunteer award information.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Volunteer Award	You can access the Global Add - Volunteer Award screen by clicking the **Award Information** button on the Global Add screen. From the Global Add - Volunteer Award screen, you can add a new award information.

Volunteer Checklist Items

You can globally add volunteer checklist information.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Volunteer Checklist Items	You can access the Global Add - Volunteer Checklist Items screen by clicking the **Checklist Information** button on the Global Add screen. From the Global Add - Volunteer Checklist Items screen, you can add a new checklist information.

Volunteer Time Sheet

You can globally add volunteer time sheet information.

Globally Add

The following table displays the type of information you can add to records in *The Raiser's Edge* using **Globally Add Records**. The **"Add" field options** column displays what is selected in the **Add** field of the Global Add screen; the **Data Available** column displays what you can add if you select the corresponding **Add** field option.

"Add" field options	Data Available
Volunteer Time Sheet	You can access the Global Add - Volunteer Time Sheet screen by clicking the **Time Sheet Information** button on the Global Add screen. From the Global Add - Volunteer Time Sheet screen, you can add a new time sheet information.

Glossary

This section defines words and phrases you need to know. If you come across an unfamiliar term when reading this or any other guide in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Action bar. An action bar is a screen element that contains buttons, such as **New**, **Open**, and **Delete**, you can use to perform quick actions.

Administration. *Administration* is a shared area, common to all *The Raiser's Edge* programs, containing options to manipulate your data. With *Administration*, you can monitor system statistics, import and update data, validate your database, and grant or restrict a user's security access to all areas of the program. You can also globally change and delete information to make editing the database quicker.

Adobe® Acrobat® Reader. *Adobe® Acrobat® Reader* is a third-party software application that enables electronic distribution of formatted documents. *Adobe® Acrobat® Reader* can be downloaded free from the Adobe Web site.

API (Application Programming Interface). API for Advanced Application Development allows experienced programmers can use with Blackbaud's programming object models to create applications that interface with *The Raiser's Edge* applications.

Attribute. An attribute is a reporting tool you use to group information based on a common theme. With attributes defined, you can filter information to your specifications. Examples of *The Raiser's Edge* attributes include account attributes, project attributes, transaction attributes, action attributes, vendor attributes, purchase order attributes, and invoice/credit memo attributes.

Business rule. A business rule is a system-wide preference you set in *Configuration* to customize standard procedures and requirements. With business rules, you can control functions and displays affecting all users in the program.

Configuration. *Configuration* is a shared area of *The Raiser's Edge* you use to set up your system and define settings to customize the program for individual users.

Contact. A contact is the name of the primary person with whom you conduct business. For example, you can enter contact information about a vendor on the Vendor tab of a vendor record, or you can enter contact information on the Banks tab of an open bank record.

Control report. A control report lists the records affected by the global add. It includes the number of records processed, added, and not added but registered as exceptions; query information; the run date; and reasons for any exceptions. You can mark the **Preview** option to preview the report on your screen or the **Print** option to print it on your printer.

Database. A database is a collection of information organized so that a computer program can quickly select desired pieces of data. It works much like an electronic filing system. Traditional databases are organized by fields, records, and files. A field is a single piece of information; a record is a set of fields; and a file is a collection of records.

Default. A default is a field entry you select on the Options screen to help increase the ease and speed of data entry by providing a preset value.

Default Set. A default set is a record of default transaction information you can create and load in a batch. Once loaded, the defaults appear on the record.

Dynamic query. A dynamic query is a query that refreshes and updates results automatically each time the query is run, providing the most current results.

Exception. An exception is a record that cannot accept the global add. For example, when you try to globally add a primary business relationship to a record that already has a primary business relationship, the program does not preform the add function. This record is an exception.

Field. A field is a data entry box in which you add and store information on records in your database.

Home page. The Home page is a feature common to all *The Raiser's Edge* programs that provides a central location for quick and easy access to all areas of the program. Using links and tabs, you can customize your Home page to display records and functions you use most frequently.

Operation. The Edit Change Parameter screen contains an **Operation** field, where you select to add, replace, partially replace, delete, increase, decrease, copy, move, or swap information in the field. Not all **Operation** selections are available for every type of change. Your selection in the **Operation** field determines which additional fields and checkboxes appear on the screen.

Option. An option is a preference you select that specifies defaults in *The Raiser's Edge*. Options are password-specific and follow the user, regardless of the workstation he logs into.

Parameter. A parameter is any field, button, option, or checkbox that narrows the information included in a global add. By specifying parameters, you define the global add. For example, the **Include** button available on all Global Add screens is a parameter, identifying the records in your database you want to include in the global add process.

Parameter File. You can save a completed global change process as a parameter file. A parameter file contains the parameters (fields, options, and checkboxes) you select for the global change. You can save parameter files for each global change, so any user can access the file and apply the same parameters to a different global change process.

PDF (Portable Document Format). A PDF is a type of document viewed with *Adobe® Acrobat® Reader* that maintains its formatting and displays correctly on any output device. For example, *The Raiser's Edge* user guides are saved as PDFs and can be printed or accessed from the Help file, Online Manual page of the program, or the installation CD. PDF files contain hyperlinks so you can jump from topic to topic.

Preferences. See "Option" on page 224.

Query. Query is the means by which you flag, group, and list selected records from your database. You can create dynamic and static queries specific to key areas of *The Raiser's Edge* based on a set of criteria you define. Although queries group entire records, you can limit and sort the output information included in query results. You can use saved queries to limit the information processed in *Records*, *Mail*, and other areas of *The Raiser's Edge*. Using queries in this manner reduces data processing time.

Query format. Queries can be created in one of two formats: Dynamic and Static. Static queries search the database and generate a list of records that match the specified criteria at a specific point in time. Dynamic queries search the database and return records that match the criteria using the current database of information.

Query type. Query types correspond to specific application records. These vary according to the program you are using. Your selection identifies the record type you want to query and makes a list of that record's fields available for filtering, output, and sorting.

Record. A record is a page in *The Raiser's Edge* from which you add, edit, and delete information such as names, addresses, relationships, gifts, memberships, events. *Records* is also an area in *The Raiser's Edge* where you can manage records.

Security. *Security* is a shared area in **The Raiser's Edge** in which you establish access rights for users. With *Security* you can control what specific groups of users are allowed to view, add, edit, or delete information.

Security group. A Security group is a group of users you define in *Administration*. You control security in **The Raiser's Edge** by creating groups with specific rights and assigning users to groups based on how much system access you want them to have. You can edit the rights of existing groups.

Shell. The shell is a central area from which you can access all areas of **The Raiser's Edge**. When you click a link to access an area, it appears as a page in the shell.

Shortcut menu. A shortcut menu is a list of commonly used commands you can select to quickly perform actions or to display properties. **Open**, **Delete**, **Print**, and **Properties** are common shortcut menu items. To access shortcut menus, place your cursor in a field or grid and click the right mouse button.

Static query. A static query is a query that provides a record of query output that existed at the time you established the query. If you run a report two months later using the same query, the system restricts the new output to only the records from the original query. Data entered after the original query is disregarded.

Status bar. The status bar is a horizontal strip at the bottom of a screen that displays important messages to assist you in the program. For example, when the cursor is in a field with a table lookup available, "Press F7 for Table Lookup" appears in the status bar.

Tab. A tab is a design element that appears at the top of some screens in **The Raiser's Edge**. Tabs work to separate options into themed groups. For instance, you will find formatting options on various system Format tabs.

Tables. A table (sometimes referred to as a code table) is a field that contains predefined entries. Tables are established in *Configuration*, and allow users to select from a list of entries for a field, making data entry quick and consistent. In some cases, such as the **State** table, the entries are defined by the program. However, for most tables, if you have security rights, you can define entries. In **Globally Change Records**, you can opt to have the program automatically add table entries as needed. For example, you run the **Globally Change Records** process and you want to replace the **Industry** category entry "Arts" with "Arts and Music", but "Arts and Music" does not exist as a table entry for **Industry** in **Tables**. If you have security rights, you can mark the **Automatically add table entries** checkbox and **Globally Change Records** adds "Arts and Music" as a table entry for **Industry** at the same time the change records process runs.

Title bar. A title bar is a horizontal strip at the top of a screen that identifies a program or file.

Toolbar. A toolbar is a horizontal strip with buttons that, when clicked, perform specific tasks. It is located under the title bar at the top of a screen. Common toolbar buttons include **New**, **Open**, **Save**, and **Print**.

Tree view. A tree view is a hierarchical list used throughout **The Raiser's Edge**. Tree views differ from standard lists in that items in a tree view contain branches represented by dotted lines. Some tree views automatically display all branches; for others you must click a plus sign to view the branches.

Query. A query is a group or set of records from your database satisfying specified criteria. For example, think of your database as a filing cabinet. Querying is very much like asking someone to look at all records found in your filing cabinet and create stacks of records based on specific characteristics, such as all married constituents.

User option. See "Option" on page 224.

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