The Raiser's Edge 7 for Beginners

The Raiser's Edge Top 10

Follow this list to optimally use *The Raiser's Edge*. It may not be as funny as David Letterman's Top 10 list, but it's definitely more helpful. Look for more about these tips in other chapters by searching the index or looking for the timesaver graphic throughout this book. If you follow these Top 10 Tips, you'll be using *The Raiser's Edge* like a pro in no time.

♦ Save your *parameter files*. You can reuse or edit saved parameter files so you don't have to recreate reports and mailings each time.

♦ Don't forget to use *Favorites* so you can focus on just the parts of *The Raiser's Edge* you need to use everyday.

♦ Customize your "workspace" by using *Home Page*.

♦ Use *Dashboard* to create reports and get a glimpse of how your fundraising efforts are going.

♦ See only the fields and information you want by using *Custom View*.

♦ Speed up your data entry by using *Batch* to enter data in spreadsheet format.

♦ Press **F1** anywhere in *The Raiser's Edge*. The program knows where you are and offers help on the area you're in. So easy!

♦ Set *User Options*, or rules, to make *The Raiser's Edge* behave the way you want on the workstation you are logged into.

♦ Add system-wide *Business Rules* to help you work more efficiently in *The Raiser's Edge.* This is for everyone in the office to work the same.

♦ We can't say this one enough! *Back up* your data!

Resources

When you have questions about our products, we want to answer them right away. Therefore, we offer several resources to help you get the help you need when you need it. To get started, click **Support** on our website at www.blackbaud.com.

To access many of our resources, you must be logged in to the website. Click **Please Log in** on any page, enter your user name and password, and click **Log in**. If you don't know your user name or password, click **Login Help** for assistance.

Knowledgebase

For answers to "How To" questions and steps to resolve issues and error messages, turn to Knowledgebase, which is updated with new solutions each day. Support analysts record every question they are asked and the answers they provide in Knowledgebase. If your question has been asked before, you can find the answer here. To access Knowledgebase, select it from the **Support** menu on our website.

FAQs

The FAQs include the most recently asked questions from the previous month. Each question is linked to a Knowledgebase solution. To access FAQs, select it from the **Support** menu on our website.

User Guides

The user guides contain step-by-step instructions and in-depth explanations for using *The Raiser's Edge*. To access the user guides, which open in Adobe *Acrobat Reader*, select **Help**, **User Guides** from the menu bar in *The Raiser's Edge*, or select **Support**, **User Guides** from the menu bar on our website. For help selecting which user guide best suits your needs, see *Which Guides Should I Read* in the **Getting Started** section.

Help File

While you work in *The Raiser's Edge*, you can press **F1** on your keyboard or select **Help**, **Raiser's Edge Help topics** from the menu bar to open the help file. To find specific information about a process or function, type the keywords in the search field.

The Raiser's Edge 7 For Beginners

Introduction: Fundraising Made Easy

> "Be the change you want to see in the world."
>
> - Gandhi

In This Chapter...

▶ *How to Use this Book*

▶ *Fundraising Made Easy*

▶ *So, What is a Database?*

This book is your introduction to using Blackbaud's software *The Raiser's Edge*. *The Raiser's Edge* is recognized as the leading tool in the nonprofit world for tracking all aspects of fundraising, from donors (called constituents in *The Raiser's Edge*), to gifts, campaigns, funds, appeals, and much more.

The key to starting off on the right foot with *The Raiser's Edge* is to know what you're trying to achieve with the software – what information you're trying to track and where to find what you're looking for. In many cases, the program is self-explanatory. Many of the parts you will use frequently appear as neat little graphics on the left-hand side of the screen. But *The Raiser's Edge* is a large and complex program and some things don't jump right out at you. It can be really frustrating to know what you want to do, but not be able to find what you need. That's where this book comes in, to explain the features that aren't so obvious. We're going to explain the basics in this book. After you understand the basic concepts of *The Raiser's Edge*, if you want more detailed information about a specific function, the program contains an extensive list of user guides for every area of the program.

How to Use This Book

The purpose of *The Raiser's Edge* is to make your work faster and easier so you can devote more time to the business of running a nonprofit organization. Of course, as you know, nothing good comes easy. If you're willing to devote some time to learning how to use this program, you can reap some serious rewards. And we're here to help. This book is all about you. You can read it straight through or just go directly to the sections you need. This book will give you the basic information you need to learn how to use the program or to gain a foothold before you move on to more complicated features.

How This Book is Organized

This book is divided into several sections.

Introduction: Fundraising Made Easy

You are here! This section explains a bit about this book and gives a broad introduction to what *The Raiser's Edge* is and how it works.

Basics: Learning to Walk in The Raiser's Edge

This section shows you how to move around in the program, how to establish personal settings to help you work more efficiently, and how to access information to help you learn about *The Raiser's Edge*.

Records: Constituents + Gifts = Fundraising

This section focuses on how to create records and how to find and open records that already exist. You will learn how to enter information into a record and how different records interact in *The Raiser's Edge*. Focusing on constituent records, this section is a must-read for beginners with *The Raiser's Edge*.

Query: The Search for Answers

Queries are your main tool for extracting information from *The Raiser's Edge*. Whether you are creating a standalone query or trying to group specific records for a mailing or a report, you will use queries again and again. This section offers an overview of the different types of queries and how to create a query.

Getting Your Report Card: Raiser's Edge Reports

Ah, what can we say about reports? Reports are a key part of analyzing all facets of your organization. With dozens of reports available, *The Raiser's Edge* gives you the ability to create professional looking documents that detail all key areas of your fundraising efforts.

Mail, Mail, and More Mail!

Preparing and sending mailings requires a lot of time and effort for most nonprofit organizations. *The Raiser's Edge* contains a multitude of mailing functions to help make these tasks as painless as possible. This section tells you when to use each task and gives you a look at what you need to do to get a specific mailing out the door.

The Raiser's Edge: In and Out (Advanced Functions)

This section introduces you to some of the more sophisticated areas of *The Raiser's Edge*, including batches; campaigns, funds, and appeals; configuration; and custom view.

Time Out: Help Yourself

Take time to understand the self-help resources available to you. Get into the habit of searching the help file, user guides, and knowledgebase for answers. Tech bulletins are also available to keep you up-to-date with the latest information about *The Raiser's Edge*.

The Raiser's Edge...Fully Loaded

Learn about optional modules you can purchase to help customize *The Raiser's Edge* to perform the specific functions your organization needs.

Everything You Need to Know, and Then Some

Find out where you can go to learn more about *The Raiser's Edge* from Blackbaud and from other users of the program.

Conventions Used in This Book

This book follows certain conventions intended to provide a consistent format so you can focus on the information and get up and running with *The Raiser's Edge* as quickly as possible. Certain icons indicate different types of information.

	Designates a note or tip.
	Designates an item to remember as you go about using *The Raiser's Edge*.
	Designates a Caution.
	Designates a "Geek Alert" in case you want to go the extra mile to learn what goes on "under the hood" in *The Raiser's Edge*.

Designates a Top 10 or timesaver tip to remember to help you use *The Raiser's Edge* more efficiently. See The Top 10 list in the "Time Out: Help Yourself" chapter for more details.

Background - Fundraising Made Easy

Before we begin to learn the nuts and bolts of using *The Raiser's Edge*, let's explore a little background. If you're reading this book, you are involved with fundraising in some way, shape, or form. So you know fundraising is far more complicated than asking people for money to support your organization's cause. To really be successful, you have to know your potential donors. What are their interests? How much can you ask them to contribute? Why are they contributing to your organization? What can you do to make sure they continue to contribute? This is a great deal of information to keep up with, especially if your organization has a large number of donors. The best way to store all this information is to enter it in a database — that's where *The Raiser's Edge* comes in.

So, What Is a Database?

You can think of a database as a really nice library. The purpose of the library is to store books so people can easily access the information they want or need. A database does the same thing, except, instead of books, the database stores records. Just like there are different types of books, there are different types of records. You use some records more often than others, the same way the latest Danielle Steel novel is probably more dog-eared than a treatise on opera. I said *probably*; so if you're an opera fan, please don't take offense.

In *The Raiser's Edge* database, records, like books, are organized into different categories. Instead of fiction, nonfiction, and science fiction, you have constituent records, campaign records, gift records, and many more. These are further organized into smaller categories. Just as non-fiction has categories for biographies and essays, constituent records in your database are broken down into individual records and organization records.
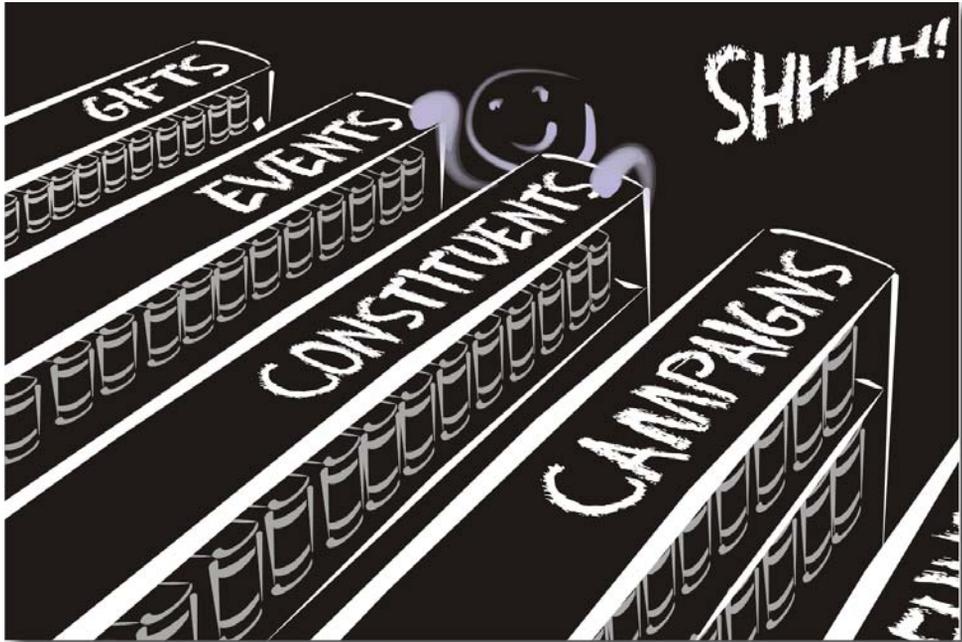
When you go to the library, there are several ways you can find books. You can just wander around until you see something that looks interesting. Or, you can be really efficient and use the call number assigned to each book to find a specific title. A database works the same way. The program assigns a unique number to each record. Although you won't see the number, the program does. This is how it knows what to look for. You can ask, or "query," your database to find specific records that meet certain criteria. We'll talk more about database queries later.

In this book, we're going to show you how to move around in *The Raiser's Edge* and how to find the information you want. We're also going to show you several ways to use the information. This program has many powerful features, but we intend to focus on the processes that you will most likely use on a daily or weekly basis.

Care and Feeding of Your Database

To begin with, we're going to talk about a few things you really need to do to make sure you have a happy and healthy database. The first rule is, don't be afraid! I promise, you won't shut down power on the east coast or bring the Internet to a screeching halt by accidentally pressing a magic function key in *The Raiser's Edge*. This program has many powerful features, and this can be intimidating. But the key to getting comfortable with *The Raiser's Edge* is understanding how the program works.

Back That Thing Up!

Backing up your database is extremely important. Even if you ignore every other suggestion we make in this book, please pay attention to this one. You may thank us one day. It's like this: when do you think about having a copy made of your car key? When you're locked out, right? Same thing with your database, except it's easier to find a locksmith than it is to reenter information you lost. Now, this isn't a contradiction of the "don't be afraid" rule. If you back up your database on a regular basis, there's no need to worry. Things happen, and you need to be prepared. Your database administrator or IT staff should create a regular backup schedule for your *Raiser's Edge* database. Once a day is recommended.

Make a New Plan, Stan

If your organization doesn't already have a system set up for entering information in the database, now is a good time to create one. This seems pretty self-explanatory, but you may be surprised. Something as simple as one person entering "The" in the name field for an organization, and another person omitting "The" can slow you down when you're trying to find the

constituent record for a specific business. Do you search for "The Special Foundation" or "Special Foundation"? Same with addresses; if one person enters Street and another enters St., you'll have a harder time tracking down specific information when you need it. These are very basic examples, but the point is that you'll save yourself headaches down the road if you have standard procedures for entering information in your database. Check out the **Support** section of Blackbaud's website, www.blackbaud.com. To check out the Shared Client Documents forums in *The Raiser's Edge* product forums, select **Support**, **Forums** from the menu bar. All of the documents in the forums were provided by our users. There are several examples of procedure manuals you can use as a starting point.

And We're Off!

So now you know what you can expect to find in this book. More importantly, you have a little background on how *The Raiser's Edge* works. Now it's time to get rolling — to begin using the program. Proceed to the next chapter and let's get started!

Basics: Learning to Walk With The Raiser's Edge

> "We realize that what we are accomplishing is a drop in the ocean. But if this drop were not in the ocean, it would be missed."
>
> - Mother Theresa

In This Chapter...

▶ The Basics - Logging In
▶ The Home Page and User Options
▶ Navigation Time-Savers
▶ Getting Help

Before you can run, you gotta learn to walk. So if entering records, running queries, and creating reports are running in *The Raiser's Edge*, then simply moving around in the program is walking. Later on, we'll introduce you to entering data into *The Raiser's Edge* and show you how to use the data to do all sorts of things that will make your life easier. But right now, we're going to concentrate on getting our footing in the program by figuring out the basics — navigating, customizing a few features to match your personal preferences, and using the help resources and documentation included in the program. In short, we're going to learn to walk. The great news is you'll be walking in no time because *The Raiser's Edge* offers so many features to help you learn and get around in the program.

Frequently in *The Raiser's Edge*, you will find you can accomplish tasks in more than one way. This is especially true of navigating. *The Raiser's Edge* provides a number of different ways for you to move around and access various items. We will go over several in this chapter to give you a starting point. After you use the program for awhile, you will probably discover other navigation features and methods. Use the ones that work best for you. No way of navigating is necessarily right and no way is necessarily wrong; it's a you say "potayto," I say "potahto" kind of thing. Well, actually I usually just say "french fries," but you get the idea.

The Basics – Logging In

Let's get started with the most basic thing of all – logging into *The Raiser's Edge*. Your supervisor will assign you a user name and password. To begin your journey, simply click **Start** on your *Windows* taskbar, then click **Programs** and select **The Raiser's Edge**. The login screen appears. Fill in your **User name** and **Password**, click **Enter**, and you're ready to go!

Don't Forget...

The Raiser's Edge comes with a sample database. We encourage you to log into this sample database and use it to practice the concepts we go over in this book. You can safely add and alter records in the sample database without worrying that you may be causing problems in your "real" database. To use the sample database, select "Raiser's Edge 7 Sample Database" when you log into the program.

You can set all sorts of preferences and favorites that reflect the ways you like to do things in *The Raiser's Edge*. These settings are saved based on your password and user name. Because of this, if you're using the network version of the program, when you enter your user name and password to log into any workstation, *The Raiser's Edge* shows your personal settings.

So, you're logged in and ready to go. If the release notes appeared, look them over for any interesting information. (Depending on whether or not the program has already been accessed, it may have opened to your Home page instead of the Release Notes.)

Look on the left side of the screen. The area containing all those icons is called the Raiser's Edge bar. You probably thought the Raiser's Edge bar was where you went to unwind after a long day of entering records and running reports — no such luck. You can't order a martini there, but the Raiser's Edge bar is a big help with getting around in the program. When you click any of the icons in the Raiser's Edge bar, you go to a major area of *The Raiser's Edge*.

Did You Know?

You can change where the Raiser's Edge bar appears on your screen by right-clicking anywhere in the bar and selecting **Align Left**, **Right**, **Top**, or **Bottom**.

Now, let's make sure we're all on the same page — the Home page. If you are not already there, click **Home** in the Raiser's Edge bar. Your Home page appears.

Later on, if you want the program to open on some page other than your Home page, you can select another opening page in User Options. Your User Option settings are stored in *The Raiser's Edge* along with your password and user name, so your settings are used when you log into any workstation.

Home Sweet Home

Okay, so here you are — your Home page. Before we go any further, let's get familiar with the items on your Home page. Your Home page acts as the gateway to all the great stuff in *The Raiser's Edge.* The settings you establish on your Home page are used when you log into any workstation with your user name and password.

We already went over the Raiser's Edge bar. Another helpful bar, the menu bar at the top of the page, gives you easy access to numerous functions in the program. If you're familiar with using *Windows* software, you probably use menu bars all the time. Among other things, you can use the menu bar to navigate around the program.

So, we can already point out two ways of navigating. Say you want to go to Reports. You can either click **Reports** on the Raiser's Edge bar or click **Go**, **Reports** on the Menu bar. Both take you to the Reports page, and one is no better than the other; so just use the one you like best.

Geek Alert

Main pages, such as your Home page, are called Raiser's Edge "shell" pages. In tech terms, the shell is the outermost layer of programming. Shell pages serve as entryways into major areas of the program. For example, from the Records page, you can select any type of record, then search for an existing one or add a new one. Or from the Reports page, you can select a category of report, then an individual report within that category.

So, there you sit on your Home page, but it's looking kind of barren. You need to decorate the place. Hang up pictures, display that knick-knack your Aunt Gladys brought back from her trip to Hawaii — in short, add the details that make your home personal to you. You do this using the central feature of the Home page, a huge time-saver known as "Favorites."

Playing Favorites

Favorites are a key part of using *The Raiser's Edge* effectively. You can mark records, functions, and even main shell pages as favorites and store links to them on your Home page for easy access. Say you are in the process of creating a campaign. Because the campaign is a work in progress, you frequently find yourself opening the record to make changes and add new information. You can open the record by clicking **Records** in the Raiser's Edge bar, clicking **Campaigns** on the Records page, clicking **Open a Campaign**, and searching for the record (you'll learn more about finding and opening records later). However, you can avoid all that by simply marking the campaign as a favorite, which automatically places a link to the campaign on your Home page. Additionally, you can put shortcuts to functions such as "adding a constituent" or "opening a gift" on your Home page.

To add a record to your list of favorites, from the record itself, select **Favorites**, **Add to Favorites** from the menu bar. A screen pops up asking you for a description of the favorite (this is the text that will actually appear as the link on your Home page).
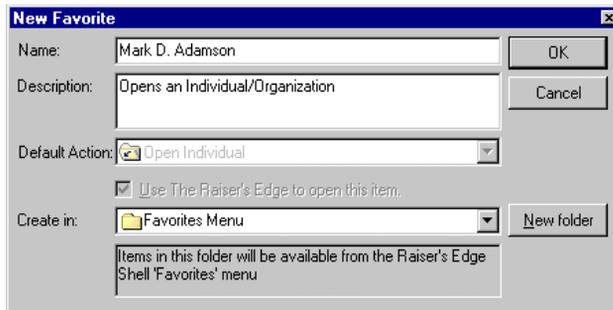
New Favorite		
Name:	Mark D. Adamson	OK
Description:	Opens an Individual/Organization	Cancel
Default Action:	Open Individual	
	☑ Use The Raiser's Edge to open this item.	
Create in:	📁 Favorites Menu	New folder
	Items in this folder will be available from the Raiser's Edge Shell 'Favorites' menu	

The name of the record defaults in as the **Description**. For the most part, you will probably want to stick with the default. Click **OK** and the link appears as a favorite on your Home page. You can also add functions as favorites and create other settings in User Options.

You can make your Home page even more useful by adding "Dashboards" to it. Dashboards provide a quick and efficient overview of specific information in your database. They let you view a real-time snapshot of your organization's progress in a particular area. For example, you can add the Appeal Summary dashboard to your Home page to easily view and track detail information about a particular appeal (or about more than one appeal).
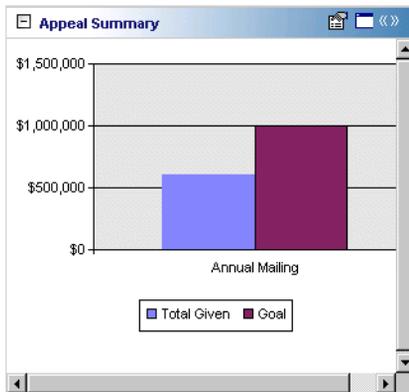
With the Appeal Summary on your Home page, when a major donor calls or your director comes to you asking how, say, the Annual Mailing appeal is doing, you can quickly access just the information he needs.

Dashboards are very easy to use, which makes them an ideal way to get information if you use *The Raiser's Edge* only occasionally or if you do not yet have a complete working knowledge of the program.

▶ *Add a Dashboard to your Home page*

1. From your Home page, click **Customize Home Page**. The Options screen opens to the Home tab.

2. Click **Panels**. The Options screen for panels appears.
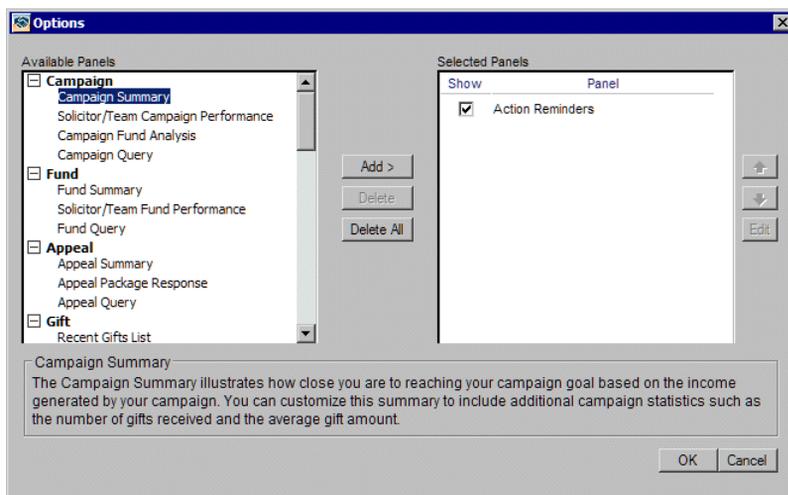
3. From the **Available Panels** box, select the panel to appear on your Home page and click **Add** to move it to the **Selected Panels** box. You can select more than one panel at a time.

    When you select a panel, a brief overview of the information that panel contains appears at the bottom of the screen. If you aren't sure exactly which dashboards you want to place on your Home page, use these overviews to help you decide. If you select a dashboard and later decide you don't want it on your Home page, you can always come back and remove it.

4. After you finish selecting the panels you want to add, make sure the **Show** checkbox is marked by each of them to ensure they appear on your Home page.

5. Click **OK** to return to the Options page Home tab.

6. Click **OK** to return to your Home page.

You Make the Call - User Options

User Options provide you with ways to customize *The Raiser's Edge* to work in the way that best suits your needs. Some of the chapters later in this book explain certain User Options you can set to maximize your efficiency when performing functions specific to those chapters. Right now, we'll focus on a few basic options you can set up to get going in the right direction.

Don't Forget...

Your supervisor may not have given you security rights to change your user options. If you do not have rights, ask your supervisor to make the changes for you.

To access User Options, select **Tools**, **User Options** from the menu bar. The User Options screen appears. Your location in *The Raiser's Edge* when you access User Options determines which tab the options open to. For example, if you access User Options from your Home page, the Options screen opens to the Home tab. But if you access them from say, a constituent record, User Options opens to the Records tab, with the Constituent options highlighted.

For now, select the General tab. On this tab you can select which *Raiser's Edge* page appears when you first open the program. Home is the default and you will most likely want to keep it, but you have the flexibility of opening to any other main shell page if you want to.

You can also set other display options. For example, if you are a no-frills type of person, you may want to unmark the **Show icons in the Raiser's Edge bar** checkbox under the Display folder. Doing so means only text links appear on your Raiser's Edge bar.
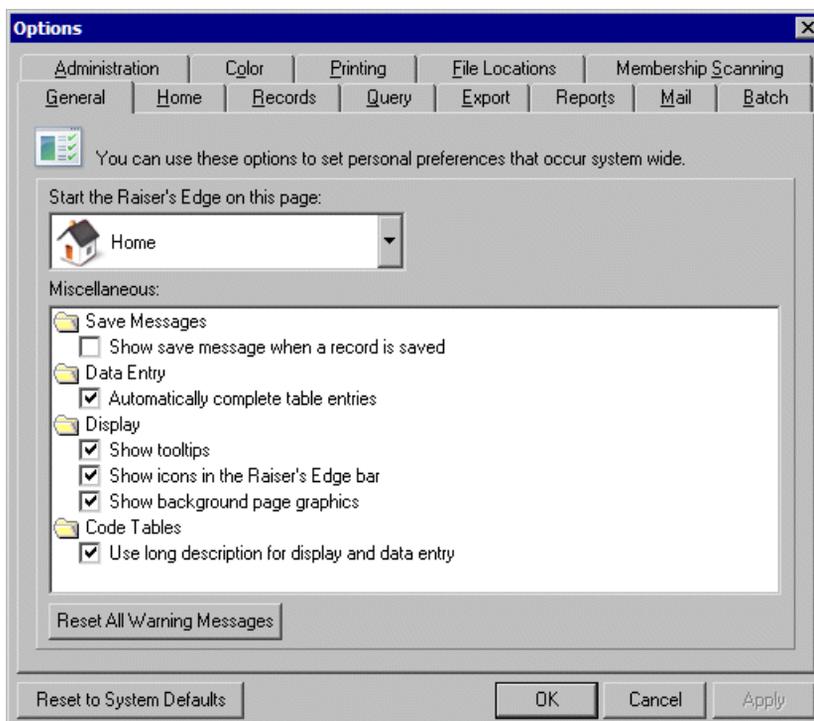
Make sure you leave the **Show tooltips** checkbox marked. Most screens in *The Raiser's Edge* have a row of buttons under the menu bar called the toolbar. These buttons provide quick access to numerous functions on a given screen. When you show tooltips, every time you hover your mouse over a toolbar button, a description of the button's purpose pops up. This is useful until you become such an expert that you have all the functions memorized.

Also on the General tab, be sure to leave the **Automatically complete table entries** checkbox marked. Tables are used all over the place for data entry in *The Raiser's Edge*. A table is a data entry field with a down arrow on the right. When you click the down arrow, a list of entries for the table appears. When you use the auto-complete user option, you can type one or two letters of an entry directly in the field, and the rest of the entry automatically fills in. This can save you time because you don't have to scroll through the list, especially in tables with lots of entries.

Next, select the Home tab. The **Show Favorites** checkbox defaults to marked. You already learned how to make records favorites; on the right side of the Home tab, you can select functions to appear as favorites on your Home page. For example, you may frequently update addresses for your constituents, which means you open lots of constituent records. In that case, you may want to add "Open individual" and "Open organization" to your list of favorites. You can click the **Organize Favorites** button to set the order your favorites appear on your Home page.

Record Screens

One great thing about *The Raiser's Edge* is that most records are set up pretty much the same way. Of course, they contain different fields and information, but once you learn where things are in one type of record (a constituent record for example), you will probably be comfortable working in most other types of records. It's kind of like driving a car. Different cars have different bells and whistles, but once you can drive one car, you can pretty much figure out how to drive most other cars.

Most record screens in *The Raiser's Edge* contain similar elements to help you perform functions throughout the program. Some of these elements are probably familiar to you from other *Windows* programs.
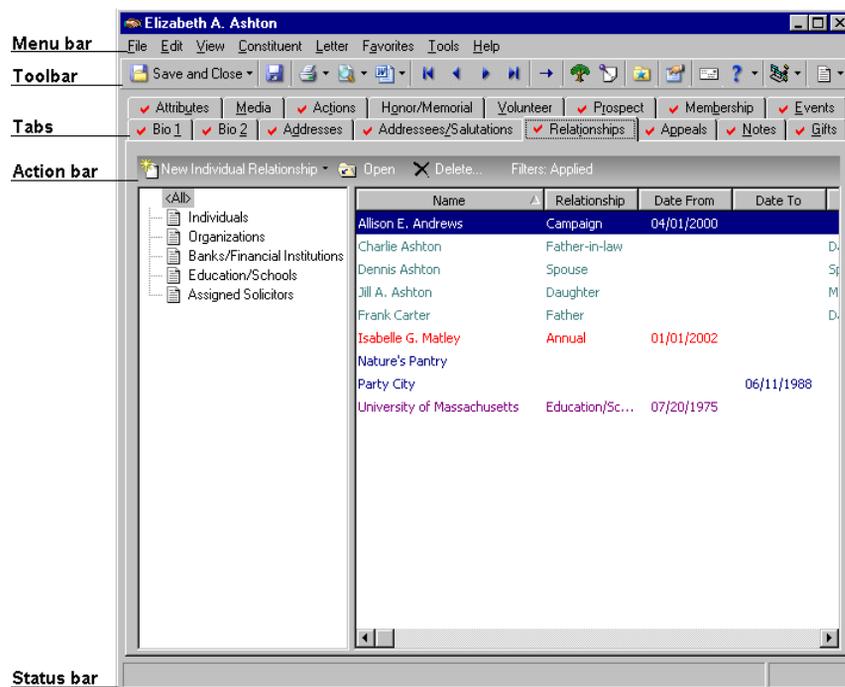
The menu bar, like that found on shell pages, accesses a wide variety of things you can do. The actual things you can do vary based on the particular screen you are on. The toolbar contains buttons to help you quickly carry out functions without using the menu bar.

Many record screens also contain an action bar below the toolbar buttons or tabs. You'll use action bars to do tasks such as adding, editing, or deleting information. The status bar appears at the bottom of many records. As you use the program, important messages appear in the status bar.

Navigation Time-Savers

Whether you are more comfortable using your keyboard, your mouse, or a combination of both, you can choose the navigation method that best suits your needs. In this section, we look at some shortcuts that can save you time as you move around in *The Raiser's Edge*.

Heating Things Up - Hot Keys

"Hot" keys are available throughout the program to help you access records and features using the keyboard instead of your mouse. These keys are also known as "shortcut" keys. When pressed at the same time as the **ALT** key, a shortcut key accesses a menu item.

You can quickly recognize a shortcut key because it is underlined in the menu bar. For example, when you look at the file menu, the **F** is underlined.
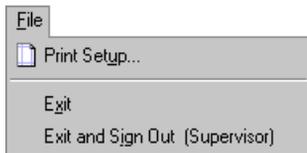
So, when you press **ALT** + **F**, the **File** menu appears just as if you had clicked **File** with your mouse. Most menu items contain a shortcut key. Additionally, some buttons and other features contain shortcut keys. Using these shortcuts can help reduce wrist stress from repeated mouse-clicking and save time moving between the keyboard and mouse.

Most submenu items also contain a shortcut key. To carry out a submenu function using the shortcut key, first open the main menu item. When the submenu appears, keep the **ALT** key depressed, but release the shortcut key. With the **ALT** key still depressed, press the shortcut key letter for the submenu item you want to access.

Did You Know?

To access a menu item with a shortcut key, you usually press **ALT** and hold, then press a letter to access the menu item that uses the letter as a shortcut. To access a submenu, press **ALT** and the letter on the main menu, then without releasing the **ALT** key, press the key for the underlined letter in the submenu command. However, sometimes a button or tab has the same shortcut key letter as a menu item (there are so many features in *The Raiser's Edge*, that on some screens they simply ran out of letters). In these instances the procedure is a little different. To access the menu item, press **ALT**, then release it and press the letter. To access a button or tab, press **ALT** and hold, and, while holding, press the underlined letter. For example, on a gift record **ALT + A** accesses the Matching Gift tab; **ALT**, **A** (**ALT** is released before pressing **A**) accesses the **Favorites** menu. Remember, if this sounds a little "key crazy" to you, just use your mouse. It's completely your call!

Ctrl Key Shortcuts

CTRL key shortcuts use a combination of the **CTRL** key and a letter to access a feature or function. You may be familiar with **CTRL** shortcuts such as **CTRL + C** for copy and **CTRL + V** for paste because they are standard throughout *Windows*. *The Raiser's Edge* features some other shortcut combinations. You can use these combinations instead of clicking the menu commands, so you can keep your hands on the keyboard instead of using your mouse.

- **CTRL + N** (New) Opens a new record in addition to the currently open record.

- **CTRL + O** (Open) Accesses the Open screen for a type of record so you can search for the specific one you want to open. When you open a new record, the current record is closed.

- **CTRL + I** (Open in new window) Accesses the Open screen for a type of record so you can search for the specific one you want to open. When you open a new record, it appears in a new window so that both it and the previous record are open at the same time.

- **CTRL + S** (Save) This command saves any changes to the current record and keeps it open for further editing.

- **CTRL + W** (Save and new) This command is a real time-saver if you want to save and close the current record and create a new one. Using this command saves the text in the current record and creates a new record without closing the current screen, so you save time waiting for a new record screen to open.

- **CTRL + L** (Save and close) This command saves any changes you made and closes the current record.

Did You Know?

To see which **Ctrl** key shortcuts are available on a given screen, you can click the **File** menu for that screen. The shortcut combinations appear beside menu items for which they are available.

Shell Shortcuts

Many shell pages in the program contain links to other specific areas. For example, the Records page contains links to **Constituents**, **Campaigns**, **Funds**, and all your other record pages. A list of links to the other record pages appears beside the Raiser's Edge bar (and like the Raiser's Edge bar, you can right click on it to change its position on your screen).

Function Keys

Function keys have several functions (Surprise!) in *The Raiser's Edge*. You can use these keys to perform helpful tasks such as inserting date and currency amounts and accessing help.

- **F1** - The **F1** key is there to help you. If you are on a screen in *The Raiser's Edge* and don't know what to do on that screen, press **F1**. The help file opens to a topic with information about the particular screen you are currently on. So, if you have a question about the current screen, remember to press **F1** for help.

- **F2** - Pressing the **F2** key inserts a default value in a field (if one exists in a default set). In *The Raiser's Edge*, you can create default sets to automatically place information in certain record fields. For example, if most of your constituents are from the same city and state, you can add them to a default set and automatically place that information in new records.

- **F3** - Pressing the **F3** key inserts the current date in date fields.

- **F5** - Pressing the **F5** key refreshes some grids and puts a time or date stamp on notepads.

- **F7** - Pressing the **F7** key accesses lookups in tables, calendars in date fields, calculators in currency fields, and zooms in on note fields.

Tab Key

Instead of using your mouse, you can use the TAB key to navigate through all fields, buttons, etc. in a specific order on each screen.

Space Bar on Keyboard

You can press the space bar to mark or unmark a selected checkbox without using your mouse.

Right Click - the Right Stuff

Many *Raiser's Edge* screens feature right-click menus that enable you to quickly and easily access tasks without using the menu bar or toolbar. In virtually every grid, you can right-click to bring up a menu. For example, when you right-click anywhere on the constituent record, Addresses tab grid, a menu appears that enables you to export the grid, print addresses, select which columns appear in the grid, and much more. So remember, when in doubt, right-click. You may find just the option you're looking for.

Also, **SHIFT** + **F10** accesses the same menu as right-clicking on many screens.

Getting Help

The Raiser's Edge offers a variety of ways for you to get information about using the program. Help for *The Raiser's Edge* is available in two main ways: the help file and the user guides. Additionally, *The Raiser's Edge* offers numerous tools to help you learn how to use the program and get the most from it.

Help File = Helpful

The help file is designed to give you quick answers. It contains a table of contents, index, and search features that help you find information about all areas of *The Raiser's Edge* from a single location.
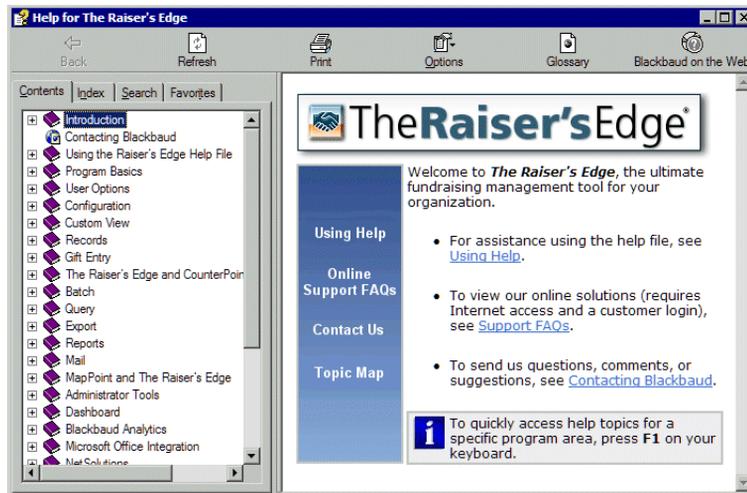
There are many ways to access the help file.

- ✔ Press **F1** on your keyboard to open the help file to a topic with specific information about the screen in the program you are currently on.

- ✔ Click **Help** in the Raiser's Edge bar and select **Help Topics**.

✔ Select **Help**, **The Raiser's Edge Help Topics** from the menu bar.

Using the Help File

- **Contents** - The Contents tab contains books and pages showing categories of information in the help file.

- **Index** - The Index tab shows words and phrases associated with topics in the help file. To open a topic associated with an index item, select the keyword and then click **Display.**

- **Search** - The Search tab gives you the ability to search for specific words in the help file and locate topics containing those words. Full-text searching looks through every word in the help file to find matches.

  Say you are looking for information about address processing. If you type address processing in the search field, every topic that contains those words in any order will show up in the results. It can be pretty tough to weed through all those results to find what you're looking for. Here's a helpful tip – when searching for a phrase, surround it in quotation marks. By searching for "address processing", only topics that contain the phrase appear as results of your search. Because fewer topics show up as "hits" for your search, it is much easier to locate the specific topic you are looking for.

  You can also search previous results, find similar words, and search only topic titles. When the search is completed, a list of topics is displayed so you can select a specific topic to view.

- **Favorites** - You can store a list of your favorite or most frequently used help topics on this tab. It's simple to add topics as favorites: when the topic you want to store appears in the right-hand pane, just select the Favorites tab and click **Add.**

User Guides

This book provides a good foundation of the basics of *The Raiser's Edge*. When you need in-depth information about a specific area of *The Raiser's Edge*, consult the user guides. Each user guide is updated regularly, so check the user guides often for updates and other valuable information. To access the guides, which open in Adobe *Acrobat Reader*, select **Help**, **User Guides** from the menu bar in *The Raiser's Edge*, or select **Support**, **User Guides** from the menu bar on our website.

Congratulations!

You just learned how to walk! You know how to log in and move around in *The Raiser's Edge*, how to customize a few User Options, and how to make your Home page a nice place to live.

You are ready for the heavy lifting: entering data, tracking data, getting data back out in the form of reports and mailings. Now that you know a bit about getting around in *The Raiser's Edge*, it's time to move on to the fun stuff – *using The Raiser's Edge*.

Records:
Constituents + Gifts = Fundraising

"There are two ways of spreading light: to be the candle or the mirror that reflects it."

- Edith Wharton

In This Chapter...

▶ Constituents: The MEAT
▶ Gifts: The POTATOES
▶ User Options for Constituent and Gift Records
▶ Entering Data
▶ Part 1: Constituent Records
▶ Part 2: Gift Records

So what does fundraising *really* mean?

Webster defines fundraising as "the organized activity of raising funds as for an institution or political cause." Okay, I guess we can all go home now! Well, maybe not. Because you're reading this book right now, you know there's a lot more to fundraising than bake sales, car washes, and a quick definition from the dictionary. Fundraising encompasses the researching, planning, and executing of events; endless solicitation mailings and thank-you letters; countless volunteer hours; the tedious everyday tasks that all nonprofits must perform in order to keep bringing in the money. And for many organizations, *The Raiser's Edge* helps complete these tasks.

As we explained earlier, *The Raiser's Edge* is really a large database (a nice library of information, if you will). You can input data, extract data for reporting, and query your database for information. When we say "data", we are referring to the meat and potatoes of why your organization exists in the first place — constituents and gifts.

Constituents: The MEAT

Constituents are the individuals and businesses who support your organization by contributing time, money, and resources. *The Raiser's Edge* uses a format called records to group information together. Constituents can be entered into *The Raiser's Edge* either as individual or organization records.

Individual constituents can range from the volunteers who take tickets at the door, to people who donate money for your annual campaign.

Organization constituents are businesses who may match their employee gifts to your charity, donate office space for your staff to organize an event, or donate computers or company stocks to your organization.
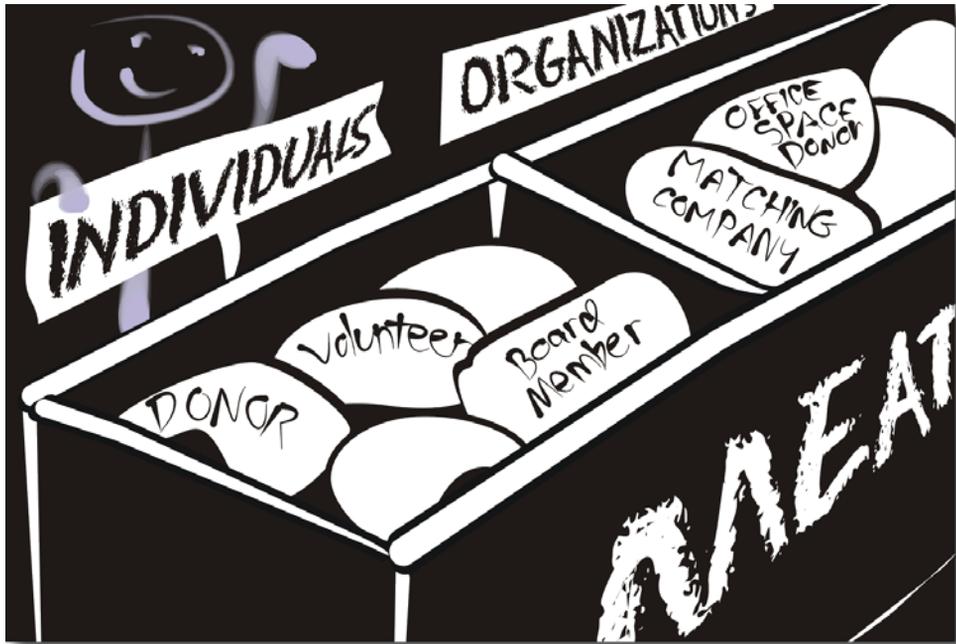
Your database can consist of all types of constituent information, including biographical data, addresses, employment, giving histories, notes, prospective donors, and even alumni. In *The Raiser's Edge*, you can track just about anything related to your organization. However, it's up to you to decide how you want to organize it.

As we stated earlier, you must be consistent with your data entry. Choose a technique and stay with it. If you don't, you'll be entering data using different methods and expecting a consistent outcome. *The Raiser's Edge* is a smart cookie, but it's only as smart as you *help* it to be. Basically any information you want to eventually pull out of *The Raiser's Edge* (when you are querying or reporting) has *everything* to do with your constituents and the way you enter them into the database.

You'll learn about creating useful records a little later. The same concept applies to campaign, fund, and appeal records, and even event and job records (keep reading…you'll learn about these later too).

Gifts: The POTATOES

Let's face it, gifts and the constituents who give them are what keep most nonprofits up and running. Gifts can be donations of money, pledges, stocks, storage, free rent, and even material objects like computers or office furniture. A gift is anything given to your organization to help in some way. In *The Raiser's Edge*, you can enter these gifts and keep track of them by running reports to find out how many donations your organization receives month to month and querying the database on specific gifts and who gave them.

A gift record contains details about a donation given by a specific constituent. Gift details include the gift date, amount, and type; the person or "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. Just as your Social Security Number can pull up all kinds of vital information about your life, gift records house vital information about gifts. Basically, everything you'd ever want to know about a gift can be stored on the gift record. If these gifts are entered into your database consistently and efficiently, you will have no trouble running reports and querying the database for statistics or other information.

User Options for Constituent and Gift Records

Before adding a constituent or gift record in *The Raiser's Edge*, you can set preferences or "options" in the program. These options are called "user options" and affect how *The Raiser's Edge* looks and runs on your workstation. When you log off that workstation, your preferences are not active for any other user. How does this program remember what you want? It has to do with your user name and password that are used for security purposes. We'll talk more about security later in the Configuration chapter.

In *The Raiser's Edge*, the Options screen houses all user options for the program. To access the Options screen, select **Tools**, **User Options** from the shell menu bar. Select the Records tab. Many options appear for records. For example, let's say you want to define how a constituent name appears in the constituent record title bar. Maybe you want the whole name to appear or just

the first name and last name. Of course, this is a very common option to set because you want to control how the title appears on all records. Simply select **Individual title bar** from the treeview on the left and options for the title bar appear on the right. Go ahead and select how you want the title bar to appear based on the options in the drop-down menu.
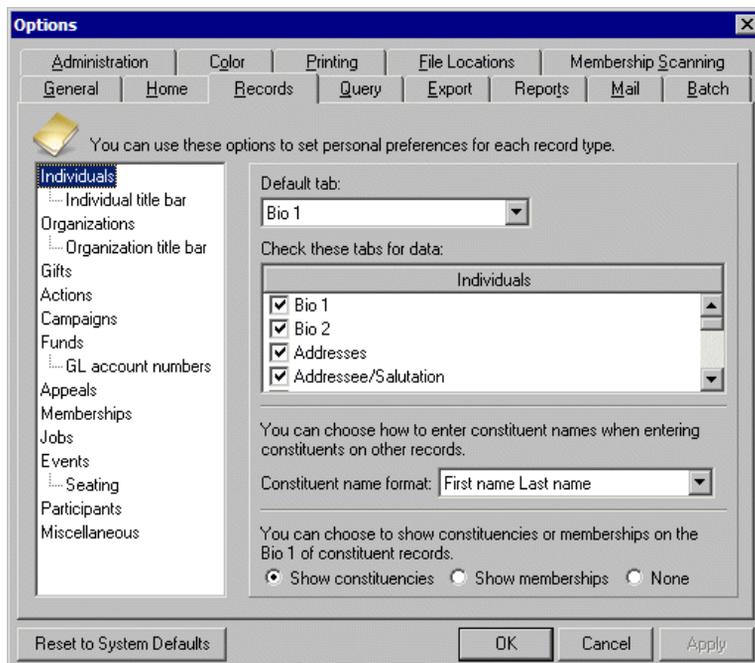
You can also select the tab you want to have focus when you open a record. For example, if you work more with the Gifts tab than any other tab on a constituent record, you can set this tab as the default tab. When you open a record, the Gifts tab appears. In addition, you can select which tabs you want to appear with a checkmark when data exists on that specific tab.

Did You Know?

Required fields appear in aqua (by default). You can change the default color on the Color tab.

Play around with the different tabs to see what options are available. Once you are happy with your settings, click **OK** to apply and save your changes. You can now begin to add records to the database.

Entering Data

The information stored on a constituent or gift record is used extensively throughout *The Raiser's Edge*. Because information contained on a record is used to generate reports, queries, and mailings, you should consistently enter data in as many constituent and gift fields as possible. Notes and attributes are also great ways to add additional information about a constituent or gift.

There really is no "magic" way of entering data in the program. It's all about consistency, accuracy, and taking advantage of the space provided to you in the program. For example, if Sally down the street keeps commenting that she would like to donate to your Annual Fundraiser but always forgets to send in her donation, add this information to her constituent record on the Attributes tab. Then, you can go back and make sure you include her in all mailings or even give her a call to remind her.

Don't Forget...

The Raiser's Edge is very large and can house countless bits of information about your constituents and the gifts they give. Use the space.

Keeping your data entry accurate is vital. We strongly encourage you to set up data entry protocols for your organization to keep records consistent and help reduce errors. Believe me, you'll thank us later.

Part 1: Constituent Records

Now that you understand what a constituent record is, let's go over how to find existing records and how to create new ones.

Where Did I Put that Constituent Record?

You can access constituent records by clicking **Records** on the Raiser's Edge bar. The Records page appears. From the **Constituents** link, you can work with individual and organization constituent records.
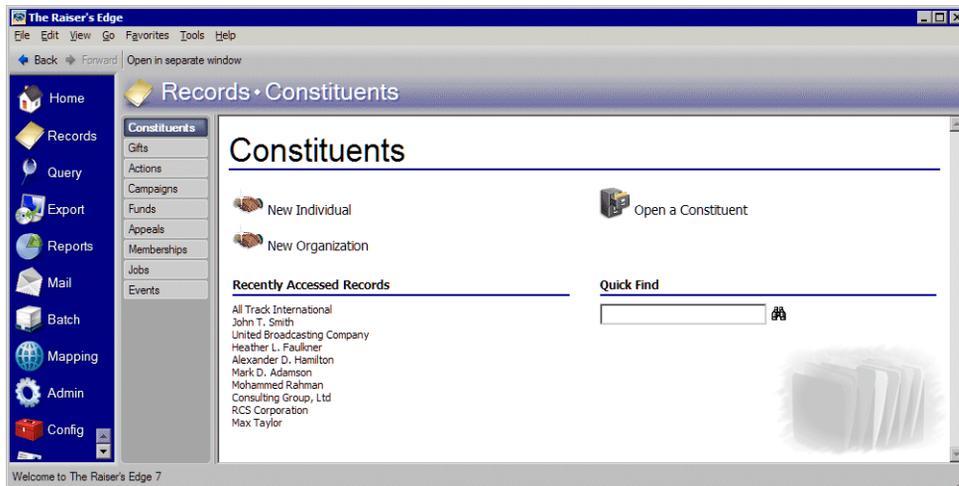
Once a record is in the database, you can use the Open screen to locate and open the record.

By using the Open screen, you are telling *The Raiser's Edge* exactly what you're looking for. In other words, you have the power! You can make the search wide-ranging or specific, depending on the criteria you select. If your database is small, you'll be better off entering limited amounts of information, such as the first name or last name of a constituent. That way, several (but not too many) records will appear, and you will have no problem browsing to find the record you're looking for. Or perhaps, you're looking for a gift record, and your database is large. You are better off entering more specific criteria, such as the gift record name, type, or even the gift date.

Also, the search process is not case-sensitive, so you can enter Smith, smith, or SMITH as a last name and get the same results. You can also use "wildcard" characters if you are not sure how a word is spelled. Wildcards are fun. Check out the Query chapter for more information about these crazy characters.

Did You Know?

You can maximize and resize your constituent records by using the tools in the upper right corner of the record screen or by dragging the screen's edges to make it taller or wider.

You can use the Open screen to search for any type of record whether it is a query, constituent, campaign, or gift. The procedure below specifies opening a constituent record.

▶ *Open a record*

1. On the Raiser's Edge bar, click **Records**.

2. Click **Constituents**. The Constituents page appears.

3. Click **Open a Constituent**. The Open screen for Constituents appears.

Did You Know?

You can use Shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + S** on your keyboard to save a record or **CTRL + O** to open a record.

4. Under **Find Constituents that meet these criteria**, enter the criteria you are using to search for the constituent. The criteria you can use include the constituent's first or last name, identification number, Social Security Number, or state.

5. After you enter your search criteria, click **Find Now**. The program searches your database and displays all constituents who meet your search criteria. Again, depending on how limited or detailed your criteria are, the program may find one record or many records.

6. In the grid, select the constituent you want to open.

7. Click **Open**.

Creating Constituent Records for your Database

Now that you have an understanding of what constituent records are and you know how to look for them, let's practice creating useful, searchable records.

Don't Forget...

You may want to think about creating a procedures manual to specify how you want users at your organization to enter data, maintain records, and perform various functions related to your *Raiser's Edge* database. By documenting your rules and guidelines for data entry, you help maintain the consistency of your data entry. This is important for the accuracy of your reports, summaries, and queries. Your manual can also act as a useful training guide for new employees and volunteers too. Check out the **Support** section of Blackbaud's website, www.blackbaud.com. To check out the Shared Client Documents forums in *The Raiser's Edge* product forums, select **Support**, **Forums** from the menu bar. All of the documents in the forums were provided by our users. There are several examples of procedure manuals you can use as a starting point.

The "Anatomy" of the Constituent Record

As we talked about earlier, constituents are part of the "meat and potatoes" of how your organization exists in the first place. When entered correctly, constituent records can be very useful when querying your database and running reports. Before we add a constituent record, let's take a moment to examine the "body" parts that make up a constituent record.

A constituent record is broken down into tabs such as Bio 1, Bio 2, and Addresses. Each tab contains specific groups of information. These groups help you store the most information about a constituent as possible. So, when it's time for you to query your database for a constituent record, if you've entered as much constituent information as possible, you can query using a variety of criteria.

Many of the same tabs exist on both an individual and organization constituent record. For example, on both types of records, you will find a Prospect tab and a Membership tab. Some different tabs that you'll see on an individual constituent record are Bio 1, Bio 2, and Addressees/Salutations tabs.
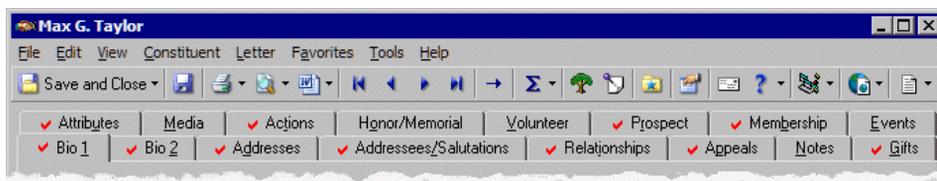
On an organization constituent record, you will also find some of the same tabs as an individual constituent record, such as an Appeals tab and a Media tab. Some different tabs that exist on an organization constituent record are Org 1, Org 2, and Gifts tabs.

Bio 1 Tab

The heart of the individual constituent record is the Bio 1 tab. The Bio 1 tab stores general biographical information, such as name, address, telephone numbers, constituent ID, birth date, and marital status.

Org 1 Tab

The heart of the organization constituent record is the Org 1 tab. The Org 1 tab stores general company information, such as business name, address, telephone numbers, and matching gift data.

Bio 2 Tab

The Bio 2 tab stores additional biographical information for the individual constituent. This miscellaneous biographical information includes constituent codes, income level, ethnicity, birthplace, and credit card data.

Org 2 Tab

The Org 2 tab holds additional biographical information about the organization. This miscellaneous biographical information includes constituent codes, industry, number of employees, number of subsidiary companies, and parent corporation.

Addresses Tab

The Addresses tab displays all stored addresses for a constituent and the constituent's spouse or domestic partner.

Addressees/Salutations Tab

The Addressees/Salutations tab appears only for individual constituent records because this tab tracks how you display a person's name in mailings and reports. The primary addressee and salutation indicate how the constituent's name will appear the majority of the time. An addressee (Mr. and Mrs. Robert Jones) is used for envelopes, labels, and reports. A salutation (Dear Bob) is primarily used as a greeting in letters.

Relationships Tab

The Relationships tab lists a constituent's relationships and affiliations. In day-to-day life, a constituent establishes connections with individuals, organizations, banks and financial institutions, and educational institutions. By tracking these relationships, you can compile a network of people and companies in a constituent's life. Tracking these connections will greatly enhance your database of prospective donors.

Appeals Tab

This tab lists gift totals for appeals to which the constituent responded. Appeals are the means you use to raise money for your organization. The Appeals tab gives you a quick snapshot of which appeal methods have been successful for the constituent.

Notes Tab

For each constituent, you can store multiple notepads that quickly summarize important information you need to remember. The Notes tab stores this information in one location.

Gifts Tab

The Gifts tab lists all gifts contributed to your organization by the constituent. You can quickly see gift dates, gift types, gift amounts, and funds for which the gifts were designated.

Attributes Tab

The Attributes tab helps you identify the qualities, characteristics, and preferences associated with a constituent. These attributes may include hobbies, interests, activities, committees, and important dates. While you set up attributes in the **Attributes** link of *Configuration*, you can add attributes to a constituent record from this tab.

Media Tab

The Media tab stores media objects pertaining to a constituent. These objects can include newspaper clippings, letters, pictures, and graphs. By storing these objects in your database, *The Raiser's Edge* keeps this information at your fingertips.

From the Media tab, if you have rights established from the **Security** link of Administration, you can add, open, edit, and delete media items. When you click **New Media**, the Media for screen appears so you can add a media object. You can track the **Date**, **Type**, **Title**, **Proposal**, **Author**, and **Description** of the object. However, only the **Date** and **Type** are required fields. When you add a media object to a constituent record, you insert an electronic copy of the object. Changes to the original object do not affect the copy, unless you decide to link the two. You can make changes to the electronic copy from the Media tab.

Actions Tab

The Actions tab tracks the various communications between your organization and the constituent. These actions can include meetings, mailings, phone calls, and e-mail.

Honor/Memorial Tab

The Honor/Memorial tab appears only if you have the optional module *Honor/Memorial Tracking*. This tab helps you keep track of tributes in your database. Tributes are set up to honor, celebrate, or memorialize people, organizations, or events. Constituents can contribute gifts to these tributes.

Volunteer Tab

The Volunteer tab appears only if you have the optional module *Volunteer Management*. This tab helps you track all aspects of your volunteer program, such as medical needs, job qualifications and interests, and emergency contact. You can also track how many hours volunteers worked and you can track awards given for loyal service.

Prospect Tab

The Prospect tab appears only if you have the optional module *Prospect Research*. Prospect research is an important element of fundraising. You may use an in-house research process to learn more about your constituents, or you may work with outside research companies to gather data. Either way, the Prospect tab helps you track financial information, financial ratings, gifts to other organizations, and additional important data. With this information, you can easily target constituents who are likely to support a specific campaign or fund.

Membership Tab

The Membership tab appears only if you have the optional module *Membership Management*. This tab lists detailed membership information for a constituent. You can view current and past memberships, as well as detailed membership data. You can also create reports to analyze membership activity and link gifts to memberships.

Events Tab

The Events tab appears only if you have the optional module *Event Management*. This tab lists the events for which a constituent is or was registered. It also tracks information about the number of tickets purchased, the payment method, seating arrangements, and level of participation.

Adding a Constituent Record

And now, the moment you've been waiting for! Yes, get in there and add those records to your database. Remember, constituent records store lots of information. Multiple tabs exist on a record because the goal is to add as much information as possible for a constituent. This will help you when you query your database and run reports. The more information you can add about a constituent, the more likely you'll get accurate results for querying and reporting. The following sections are broken down primarily by tab so you can learn how to add specific information for each one. Let's start with basic biographical and organizational data for a constituent.

The Bio Basics

Before adding new constituent records, make a habit of looking up the name in the database to see if a record already exists for the constituent. This is important because the last thing you want to do is to send out duplicate mailings or other types of appeals. To check for duplicate records, use the **Quick Find** field on the Records page or click **Open a Constituent** on the Records page.

Don't Forget...

An alternative way to check for duplicate constituents is to have your organization's supervisor set up a rule to check for duplicate records each time you save a record. Your supervisor can also choose to run a duplicate constituent report at regular intervals, maybe once or twice per month, to check if duplicate constituents exist in your database. If duplicate records exist, the records can be merged together.

▶ ## Add biographical constituent information

1. On the Raiser's Edge bar, click **Records**.

2. Click **Constituents**. The Constituents page appears.

3. Click **New Individual**. A blank constituent record appears. It's always a good idea to look up the constituent you're adding in case a record already exists for the constituent.

4. On the Bio 1 and Bio 2 tabs, go ahead and add any biographical information you want for your constituent. You must enter the constituent's name and give your constituent an ID number. *The Raiser's Edge* may automatically generate an ID number for each new constituent if you or your supervisor set a business rule for it to do so.

5. The **Aliases** button is useful if the constituent has a stage name or other type of name they are known by. The **Nickname** field is also available if your constituent is known by another name. This helps personalize the interaction between you and the constituent.

6. You can select the marital status for the constituent and even enter the constituent's spouse information by clicking the **Spouse** button. Remember to enter as much information as possible and be consistent when adding information for other constituent records as well.

7. On the toolbar, click **Save and Close**.

▶ *Add organizational constituent information*

1. On the Raiser's Edge bar, click **Records**.

2. Click **Constituents**. The Constituents page appears.

3. Click **New Organization**. A blank constituent record appears. It's always a good idea to look up the constituent you're adding in case a record already exists for the constituent.

4. On the Org 1 and Org 2 tabs, go ahead and add any organizational information you want for your constituent. You must enter the organization name and give your constituent an ID number. *The Raiser's Edge* automatically generates an ID number for each new constituent if you or your supervisor set a business rule for it to do so.

5. The **Aliases** button is useful if the organization is referred to as an acronym. For example, you may enter "Local Broadcasting Company" as the organization name, and as an alias, you would enter "LBC". Remember to enter as much information as possible and be consistent when adding information for other constituent records as well.

6. On the toolbar, click **Save and Close**.

Now that you've added basic information for a constituent, let's move on to adding addresses.

Addresses - Stay in Touch

To stay in touch with your constituents, you want to maintain accurate address and telephone information. The address found on the Bio 1 tab is always the preferred address (the address where the constituent prefers to receive mail). When you add an address from the Bio 1 tab, as the following procedure shows, the address is automatically marked as the preferred address.

▶ Add an address for an individual constituent

1. From an open constituent record, select the Bio 1 tab.

2. Click **More**. The Address screen appears.

3. In the **Country** field, select a country. The country you select determines the fields that appear on the Address screen. For example, if you select "Canada" instead of "United States", **State** and **ZIP** change to **Province** and **Postal Code**.

4. Enter the address information for the constituent.

5. In the **DPC** field, enter a number. DPC is the Delivery Point Code. It is used as part of the address barcode.

6. Enter the phone numbers and phone types for the constituent.

7. Enter the county and region information for the constituent.

8. It is a good idea to enter information in the **CART** and **LOT** fields. CART is the carrier route. It is used as the endorsement line and can be used to sort mailings for further discounts. LOT stands for "line of travel" and is used with the CART in the endorsement line.

9. Select the Attributes tab to add additional information for the constituent's address.

10. On the toolbar, click **Save and Close**.

Did You Know?

When you make changes to a record and save your changes, if that record has an address linked to other records, a message appears letting you know the address is shared with other records. You can click **Yes** to change the address on all shared records, click **No** to break the link and change the address on only this record, or **Cancel**.

▶ *Add an address for an organization constituent*

1. From an open organization record, select the Org 1 tab.

2. Click **More**. The Address screen appears.

3. In the **Country** field, select a country. The country you select determines the fields that appear on the Address screen. For example, if you select "Canada" instead of "United States", **State** and **ZIP** change to **Province** and **Postal Code**.

4. Enter the address information for the constituent.

5. In the **DPC** field, enter a number. DPC is the Delivery Point Code. It is used as part of the address barcode.

6. Enter the phone numbers and phone types for the organization.

7. Enter the county and region information for the organization.

8. It is a good idea to enter information in the **CART** and **LOT** fields. CART is the carrier route. It is used as the endorsement line and can be used to sort mailings for further discounts. LOT stands for "line of travel" and is used with the CART in the endorsement line.

9. Select the Attributes tab to add additional information for the organization's address.

10. On the toolbar, click **Save and Close**.

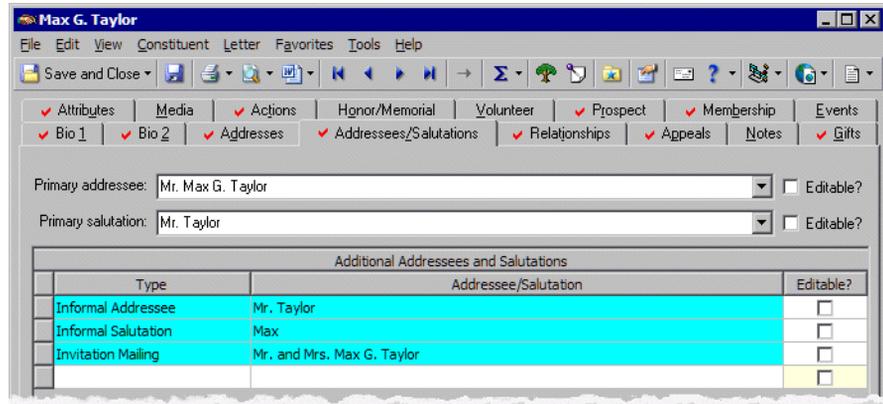## *Addressees - Miss or Ms.?*

The Addressees/Salutations tab stores a constituent's addressees and salutations. By choosing and storing specific addressees for your constituents, you are specifying the title that should appear on mailings, such as letters, invitations, newsletters, and cards. For example, Mr. Daniel H. Smith would be a specific addressee for Daniel Smith. A specific salutation for Daniel would be Dear Mr. Smith.

Format an addressee exactly as you want the constituent's name to appear on envelopes, reports, and labels. An addressee is usually formal, such as Ms. Joan Johnson or Mr. Thomas F. Stewart. A salutation, on the other hand, is how you greet a constituent in correspondence. Depending on your relationship with the constituent and the type of mailing, a salutation can be formal or informal.

Another example: You may greet Mr. Edward F. Stewart as Edward Stewart in an appeal letter and as Ed in an alumni mailing. The more addressees and salutations you track for your constituents, the more flexibility you have in addressing and greeting them. Accurately adding and formatting addressees and salutations is important because they will be one of the first impressions constituents have of your organization. How would you feel if someone asked you for a donation, and they couldn't even spell your name correctly? It's easy to get off on the wrong foot with constituents by misspelling their names.

▶ *Select a primary addressee*

1. From an open constituent record, select the Addressees/Salutations tab.

2. In the **Primary addressee** field, select an addressee for the constituent.
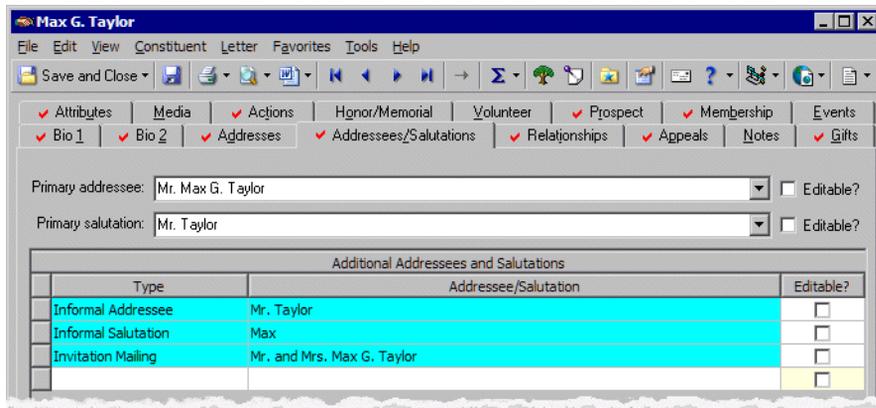
3. On the toolbar, click **Save and Close**.

Did You Know?

If you mark the **Editable?** checkbox, you can make manual changes to the Addressee and Salutation information.

▶ *Select a primary salutation*

1. From an open constituent record, select the Addressees/Salutations tab.

2. In the **Primary salutation** field, select a salutation for the constituent.

3. On the toolbar, click **Save and Close**.

Did You Know?

If you enter data in the **Nickname** or **Maiden name** field on the Bio 1 tab, it generates into an available choice for addressees/salutations.

Relationships 101

Think about how many relationships you have in your life (no need to drag out old flames for this exercise). Now, multiply that by 1,000,000. This is potentially the number of relationships that could exist in your database for all your constituents combined. Okay, that may be somewhat far-fetched, but if you are keeping an accurate list of all the relationships for each constituent in your database, the number could be huge. You can easily keep track of the number of relationships for each constituent by using the Relationships tab.

The Relationships tab allows you to record familial and social associations for your constituents. In *The Raiser's Edge*, you can track five different types of relationships for a constituent. These relationships can be individual (friends, family members, associates), organization (businesses, clubs, employers), bank (financial institutions), education (schools, colleges, and universities), and assigned solicitor (individuals or organizations assigned to secure donations from the constituent).
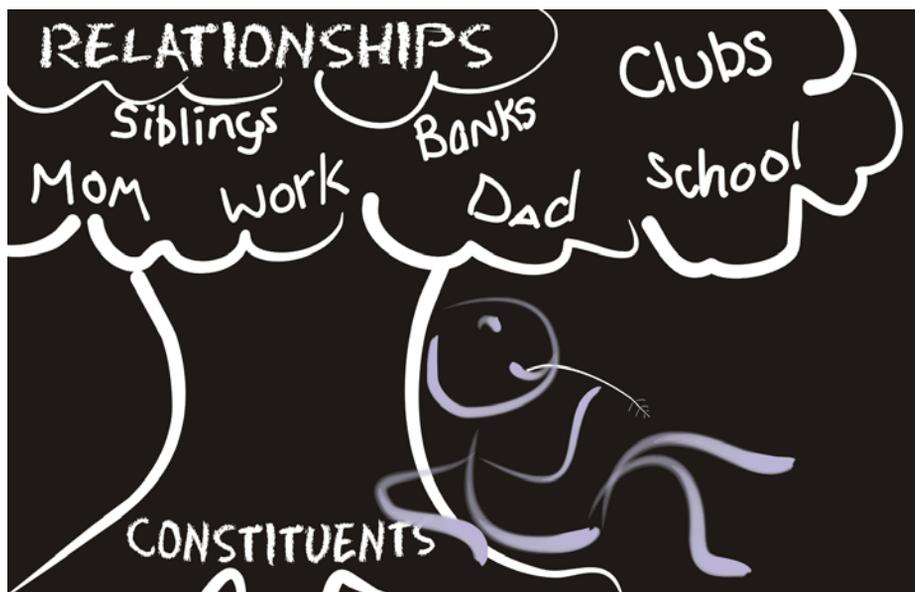
Relationships can have their own constituent records, or they can exist solely on the original constituent's record. Relationship records are similar to constituent records in that you can track valuable information on a person or business, regardless of whether or not they are a constituent.

The value of tracking relationships is for connections. If you know one of your major donors is an avid golfer, you can track his three golfing partners as individual relationships. Then, when you start planning your annual spring golf tournament, you can invite your constituent's three golfing partners and hopefully, secure a donation and three new constituents.

Don't Forget...

The Relationships tab is linked to other tabs on the constituent record. For example, if you add a spouse on the Bio 1 tab of John William's constituent record, that person automatically appears as an individual relationship on Robert's Relationships tab. This also works in reverse.

▶ *Add an individual relationship*

1. From an open constituent record, select the Relationships tab.

2. From the tree view on the left, select **Individuals** (notice you can also select to add organization, bank, school, and solicitor relationship records).
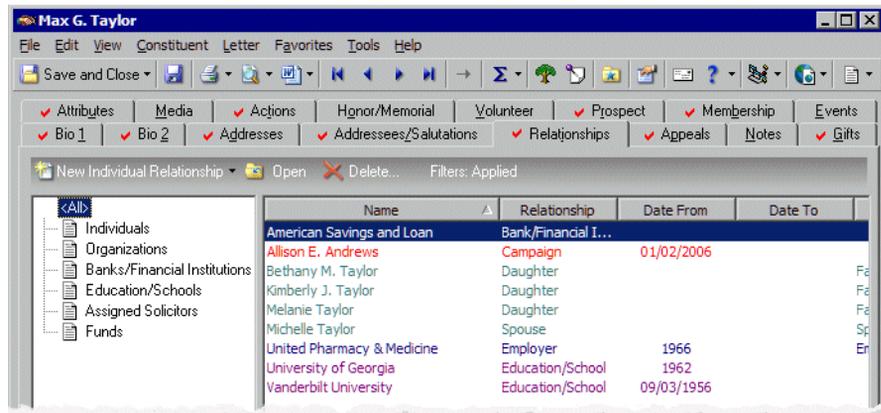
3. On the relationship record, you can add the relationship name, address, phone number, addressees/salutations, and notes. Take advantage of the space and record as much information as you can about the relationship. You never know what type of information you may need in the future.

4. On the toolbar, click **Save and Close**.

Don't Forget...

Remember to always click the binoculars in the **Name** field and search the database to make sure the relation is not already a constituent.

Attributes

What comes to mind when you hear the word attribute?

You probably think of the color of someone's eyes or hair, whether he is tall or short, or if he is athletic. Typically, we associate attributes with a person's physical appearance, like an inherited gene. When keeping track of your constituents in *The Raiser's Edge*, you want to record similar things about people associated with your organization, but you may want to be a little more specific. For example, you may want to associate a person with a specific sport or club. Perhaps one of your volunteers is in college and plays on the soccer team. You may find this a valuable point to know about this particular volunteer.

You can store attributes for your constituents on the Attributes tab. The Attributes tab stores the qualities, characteristics, and preferences you associate with a constituent. 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. The beauty of attributes is their flexibility. You can customize attributes to meet your organization's specific needs. Attributes are initially created and defined in *Configuration.* You set up broad categories, such as Interests, and then create descriptions, such as Dance, Swimming, or Gourmet Cooking, to further define the category.
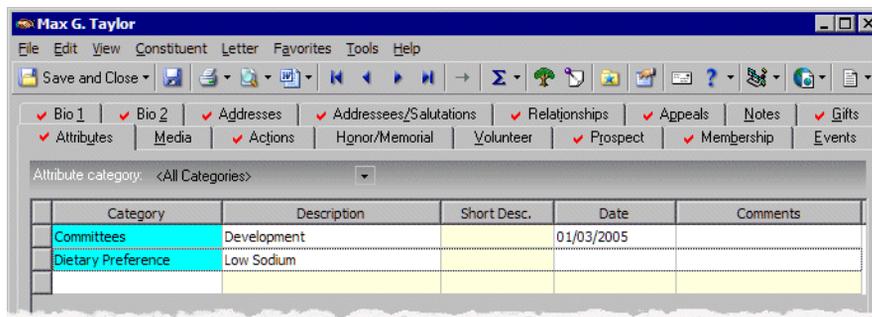
Once you establish your attribute categories and descriptions in *Configuration*, use the Attributes tab of the constituent record to assign attributes to specific constituents. You can assign an unlimited number of attributes to a constituent record and if necessary, assign the same attribute more than once to the same constituent. This flexibility guarantees you have no limitations when building a comprehensive constituent record.

You'll see attributes used all over *The Raiser's Edge* to mean different things. Once you learn how to apply attributes once, you'll see that they are used the same throughout the program. You can query a group of constituents together based on a shared common attribute. You can include or exclude constituents from a mailing or report using attributes. They are not only flexible and versatile, they are also easy to maintain. In addition to constituent attributes, you can also create attributes for your gift records. We'll get into this a little later, so just make a mental note of it for now!

▶ *Add an attribute to a constituent record*

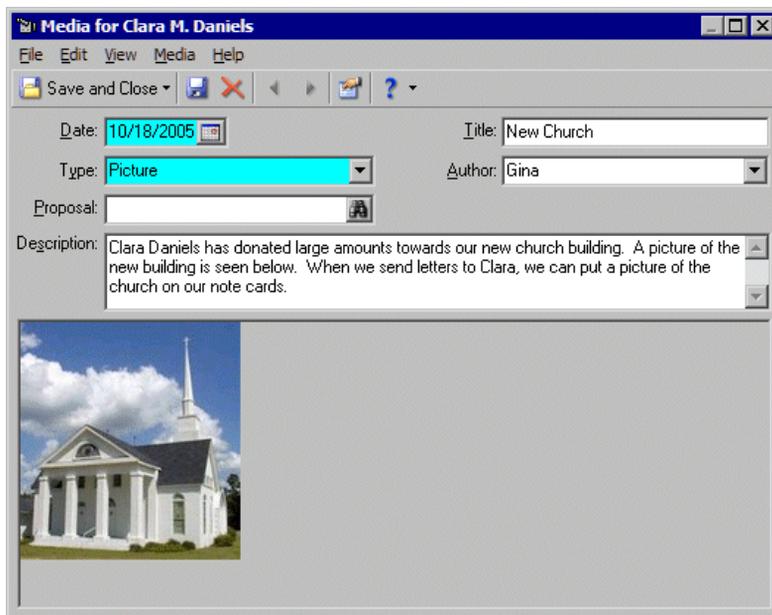1. From an open constituent record, select the Attributes tab.

2. Enter a category, description, and date for each attribute you add to the constituent's record. Also, go ahead and enter any comments that may be beneficial in understanding why you added the attribute.

3. On the toolbar, click **Save and Close**.

Fun with Media

In this day and time, media is one of the top forms of communication between people. So, of course, we have added this tidbit of fun to the program. Don't worry, paparazzi aren't allowed!

Aside from being a neat addition, the Media tab serves an important purpose: it allows you to store media objects relating to a constituent. These objects can include newspaper clippings, letters, pictures, and graphs. The objects may be important buffers when striking up a conversation with the constituent at a dinner party or even when preparing for solicitations. Of course there's no fame or fortune that comes with having your picture in your favorite charity's database, but at least this tool can help you keep track of your constituents with more than just their address and phone number.

If you have security rights established by your supervisor, from the Media tab, you can add, open, edit, and delete media items. When you click **New Media**, the Media for screen appears so you can add a media object. You can track the date, type, title, proposal, author, and description of the object.

When you add a media object to a constituent record, you insert an electronic copy of the object. Changes to the original object do not affect the copy. You can make changes to the electronic copy from the Media tab.

▶ *Add a media object*

1. From an open constituent record, select the Media tab.

2. On the action bar, click **New Media**.

3. You can either create a new media object from scratch or create a new media object from an existing file (such as a file storing a picture).

4. Once you've inserted your new media object, add information on the media object record such as the date you added the object, the type and title of the object, and a description.

5. On the toolbar, click **Save and Close**.

Action, Take One

No, we're not shooting movie scenes here, but we are about to learn how actions in *The Raiser's Edge* play an important role in the daily activities of an organization. In *The Raiser's Edge*, actions are the steps you take toward securing a donation from a constituent. They can include meetings, mailings, phone calls, and e-mails.

With actions, you can build a history of 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. Think of it as an electronic secretary.

You can assign an action to a specific constituent. When you assign an action, you create a new action record. This action record holds a variety of information, including constituent name, action category, action type, date, solicitor, status, and priority.

You can also link action records together into an action track, which is a sequence of related actions. Action tracks help you move your constituents from a proposed donor to a donor. They can be used dependently on each other (set up a phone call, then a letter, then a lunch meeting), or they can be used entirely independent of each other. The information stored in an action record is used extensively throughout the program. Because action information is used in generating reports, queries, and mailings, you should enter data in as many fields on the action record as possible.

When you add a new action record, you have the option of adding the action for a constituent or for an event. When you add an action for a constituent, you apply the action to that specific constituent. When you add an action for an event, you can apply the action to all participants of that specific event. You can also add actions for appeals.

▶ *Add an action from a constituent record*

1. From an open constituent record, select the Actions tab.

2. On the action bar, click **New Action**.

3. Enter a category for the action, the date the action is taking place, and the time.

4. You can add solicitor information, phone numbers, and specify the status of the action.

5. Add the appropriate campaign, fund, and proposal information.

6. On the toolbar, click **Save and Close**.

Honor/Memorials

With the optional module *Honor/Memorial Tracking*, you can set up honor/memorials in *The Raiser's Edge*.

Honor/memorials are people who are being honored, memorialized, or celebrated in some way. You can set up tributes for these people so others can donate to the cause. A tribute explains the reason why you are honoring, memorializing, or celebrating the honor/memorial. For example, Bob and Jane Smith are celebrating their 50th wedding anniversary, and their daughter sets up a tribute in celebration of them. You can specify that Bob and Jane Smith are both honor/memorials on each of their constituent records, and you can set up a tribute in their honor. Or you can specify just one record as an honor/memorial. Others can now donate money to this tribute. For more information about this optional module, see The Raiser's Edge - Fully Loaded chapter.

The Three VOLUNteers

When you have the optional module *Volunteer Management*, the Volunteer tab appears on a constituent record.

From the Volunteer tab, you can track information about your volunteers. With so many types of volunteers out there (summer volunteers, students, long-term volunteers, etc.), it is easy to lose track of important information about them. "Susie called in sick today…if I could just find Johnny's phone number to see if he'll come in. I know I have it here somewhere." Sound familiar?

From the Volunteer tab, you can keep this information updated. For example, you can assign volunteer types and statuses, enter an emergency contact, and track vehicle information for your volunteer.
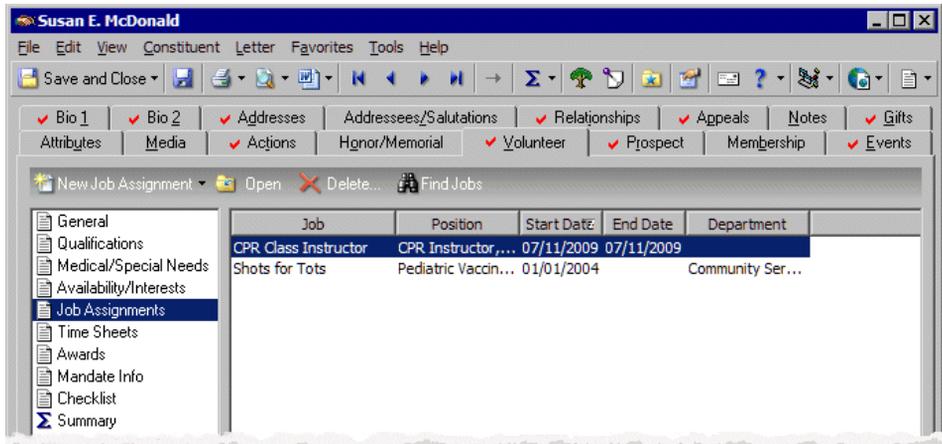
You can define qualifications a volunteer needs for certain jobs, keep track of medical information for a volunteer and other special needs, determine when the volunteer can work, and match the special interests your volunteer may have with particular jobs. For more information about this optional module, see The Raiser's Edge - Fully Loaded chapter.

Prospects, Cha-Ching $$

With the module *Prospect Research*, you can enter information about prospective donors. These are people or businesses that could potentially become donors to your organization. With this optional module, the Prospect tab appears on the constituent record.

Finding new donors is a key task for any organization. Because all nonprofits rely heavily on donations to keep their organizations up and running, finding just the right donor to match their needs is vital. The optional module *Prospect Research* manages all types of prospect information. It tracks gifts made by prospective donors to other organizations and financial information, such as sources of wealth (We like this one!), annual income, and real estate holdings of prospective donors.
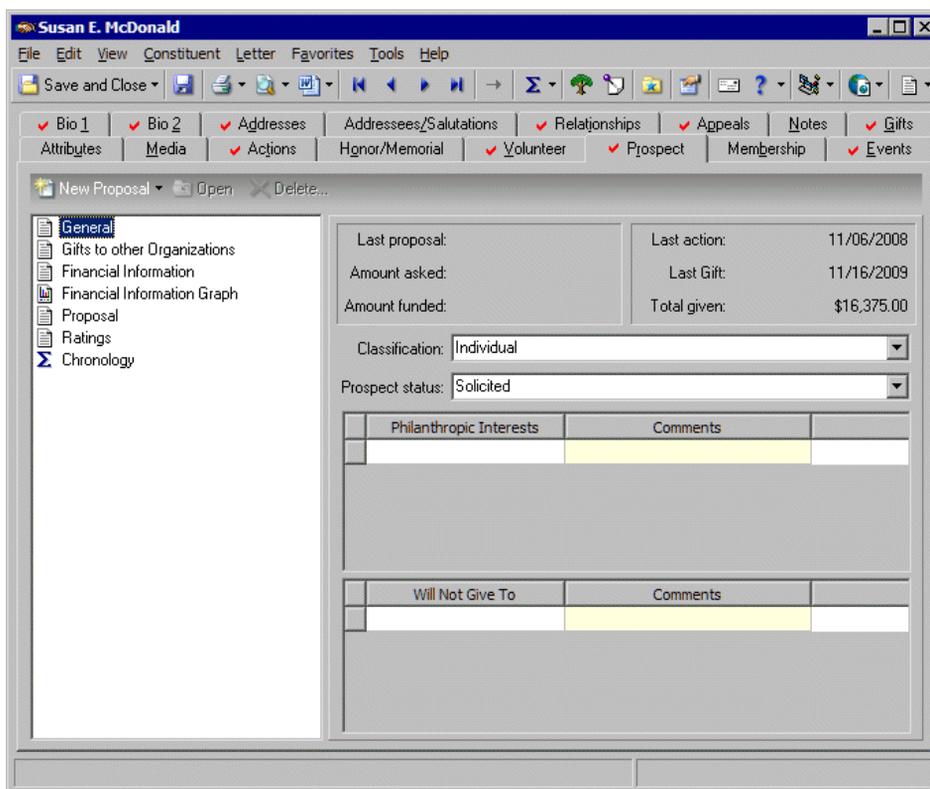
You can also track your organization's proposals, including amounts solicited, amounts funded, ratings data, and even enter extensive notes. Once you enter the prospect information in your database, you can use the data to generate several prospect research reports, such as the Outstanding Proposal report, which provides a list of proposals presented to potential donors. For more information about this module, see The Raiser's Edge - Fully Loaded chapter.

Campaigns, Funds, and Appeals OH MY!

Campaigns, funds, and appeals are extremely important to any fundraising organization. Aside from making sure your constituents and gifts are tracked correctly in *The Raiser's Edge*, the campaigns, funds, and appeals that your organization uses to raise and keep track of donations is by far the most important aspect of what you do.

Campaigns serve as an umbrella over funds and appeals. Campaigns are the "overall" picture of a fundraiser. The funds and appeals that fall under a campaign are what bring in the donations. For example, you have a New Building Campaign. Under the New Building Campaign, you create a Building Fund and a Landscaping Fund. These two funds are going to help generate donations to be used for your new building. Under the New Building Campaign, you can also have appeals, such as a monthly newsletter or an autumn phone-a-thon.

Appeals and funds work together to satisfy the needs of the campaign. We'll get into more of this a little later on in the guide. For now, an overall picture of the purpose for campaigns, funds, and appeals is all you need.

Members Only

If you are a nonprofit, you probably have several different types of memberships within your organization. Maybe your organization is a museum with different levels of membership, or maybe your organization offers a variety of clubs that your constituents can join, based on giving level. Whatever your situation, memberships probably play some sort of role in your fundraising efforts.

In *The Raiser's Edge*, the optional module *Membership Management* lets you to track memberships for your organization. For example, 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. For more information about this optional module, see The Raiser's Edge - Fully Loaded chapter.

Get a Job

Maybe you're wondering what role a job can play with *The Raiser's Edge*. Actually, jobs pretty much go hand-in-hand with your volunteers. When you have the optional module *Volunteer Management*, you can track your volunteers and the jobs they perform in your organization. Yes, *The Raiser's Edge* can even track volunteer jobs. Are you dazzled yet? You should be by now!

Jobs are the tasks, or miscellaneous pieces of work, assigned to the volunteers of your organization or to the volunteers of your organization's events. For example, your organization runs a homeless shelter. The homeless shelter runs smoothly, thanks to the endless help of volunteers from the community.

The jobs can be numerous and tough to keep up with. *The Raiser's Edge* provides an easy and efficient way to track your volunteers and the daily jobs they perform. For more information about this optional module, see The Raiser's Edge - Fully Loaded chapter.

And Now for the Main Event!

If your organization puts a great deal of time and effort into events every year, then tracking and planning these events is particularly important to the success of your organization. Events can range from dinner parties and golf tournaments to training classes and banquets.

With the optional module *Event Management,* the Events tab appears on each constituent record in your database and is used for the purpose of keeping up with the various events your organization hosts. For more information about this optional module, see The Raiser's Edge - Fully Loaded chapter.

Part 2: Gift Records

Earlier, we briefly went over the purpose of gifts. Constituents are one part of the "meat and potatoes" of your organization, and gifts are the second part. Gifts and the constituents who give them are equally valuable to the success of your organization. Gifts can be donations of money, pledges, stocks, storage, free rent, and even material objects like computers or office furniture. A gift is anything given to your organization to help in some way and is designated toward a specific campaign, fund, or appeal.

Where Did I Put That Gift Record?

You can access gift records by clicking **Records** on the Raiser's Edge bar. The Records page appears. From the **Gifts** link, you can work with all types of gift records.
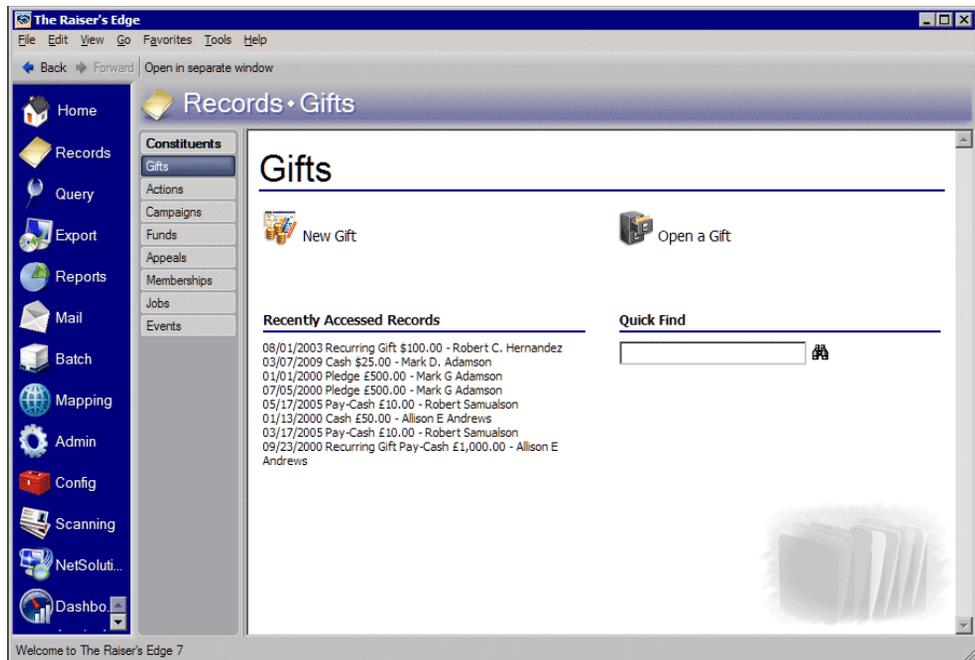
Once you add a gift record to your database, you can access the gift record from the Records page or from the donor's constituent record. You may need to open a gift record to view information entered on the record or add additional notes about the gift.

▶ *Open a gift record from the Records page*

1. On the Raiser's Edge bar, click **Records**.

2. Click **Gifts**. The Gifts page appears.

3. Click **Open a Gift**. The Open screen appears so you can search for the gift record you want to open.

4. Under **Find Gifts that meet these criteria**, enter the criteria you are using to search for the gift. The criteria you can use include the constituent's first or last name, Social Security Number, or gift type.

5. After you enter your search criteria, click **Find Now**. The program searches your database and displays all gifts that meet your search criteria. Again, depending on how limited or detailed your criteria are, the program may find one record or many records.

6. In the grid, select the gift you want to open.

7. Click **Open**.

Creating Gift Records

Each gift is stored as its own separate record and can be accessed on the Gifts tab of a constituent record or by searching for the actual gift record in the database. For example, Joe Smith donates $50 toward your 2003 Annual Fund. Later in the year, Joe decides to donate an additional $50 to the same fund. Each time you receive a gift from Joe, you need to add a new gift record to the database. Later, you can use other parts of *The Raiser's Edge* to create reports describing your fundraising progress. You can also create thank-you letters and receipts for the gifts you received.

We Suggest...

We strongly recommend discussing the different gift types and their use with everyone in your organization who adds gifts to the database. If members of your organization are not consistent with data entry, you will have difficulty producing reliable reports. You'll learn more about gift types in the next couple of sections.

Now that you have an understanding of what gift records are, and you know how to look for them, let's practice creating useful, searchable records.

We Suggest...

You may also want to think about creating a procedures manual to specify how you want users at your organization to enter data, maintain records, and perform various functions related to your *Raiser's Edge* database. By documenting your rules and guidelines for data entry, you help maintain the consistency of your data entry. This is important for the accuracy of your reports, summaries, and queries. Your manual can also act as a useful training guide for new employees and volunteers too. Check out the Support section of Blackbaud's website, www.blackbaud.com. To check out the Shared Client Documents forums in *The Raiser's Edge* product forums, select **Support**, **Forums** from the menu bar. All of the documents in the forums were provided by our users. There are several examples of procedure manuals you can use as a starting point.

The "Anatomy" of the Gift Record

When entered correctly, gift records can be very useful for querying your database and running reports. Before we add a gift record, let's take a moment to examine the "body" parts that make up a gift record.

A gift record is broken down into tabs such as Gift, Miscellaneous, and Soft Credit. Each tab contains specific groups of information.

These groups help you store as much information about a gift as possible. So when it's time for you to query your database for a gift record, you can query using a variety of criteria.

Gift tab

The Gift tab stores vital information about the gift and who is giving it. This is truly the heart of the gift record. On this tab, you can add the name of the constituent who donated the gift, the gift amount, and the fund to which the gift is designated. When adding a gift, you first need to enter the name of the constituent who donated the gift in the **Constituent** field. All other fields on the gift record remain disabled until you enter the name of the constituent who donated the gift.

You will also find basic fields such as **Gift type**, **Gift date**, and **Pay method**. From this tab, you can designate solicitors, a specific type of letter to be sent to the donor, and any special benefits the donor might receive.

Miscellaneous tab

The Miscellaneous tab houses the gift identification and gift code for a gift. Don't be fooled into thinking that miscellaneous means unimportant or unnecessary. On the contrary, the information stored on this tab is equally important as all the other tabs (We just couldn't think of a better name for it!)

On the Miscellaneous tab, you can also track the GL post status and post date for the gift. GL stands for *General Ledger* and is accounting software distributed by Blackbaud to which your organization posts gifts.

Soft Credit tab

The term "soft credit" describes the process of giving another person or organization, other than the main donor, credit for a gift. A soft credit allows more than one constituent to share credit for a single gift without adding duplicate gift records in the database.

On reports and mailings, you determine if the donor, the soft credit recipient, or both should receive credit for the gift. A single constituent cannot be soft credited with an amount greater than the gift amount.

Matching Gifts tab

Matching gifts are a very popular topic among the nonprofit community. Many organizations and companies use matching gifts as a way to encourage employees to donate money to the community by matching the employee's gift. Hey, why not double the fun, right? You can use the Matching Gifts tab to add or view gifts donated by a business matching a constituent's donation.

Let's say Johnson's Furniture Store pledged to match every gift their employees donate to your organization with a matching factor of 1 and a maximum donation of $100. Amy, who works for Johnson's Furniture, donated $50 to your organization. You can create a matching gift for Johnson's Furniture from the Matching Gift tab of Amy's gift record. When you save Amy's gift, the program automatically creates a matching gift on Johnson's Furniture Store's constituent record. You can track all matching gift information on this tab.

Tribute tab

The Tribute tab is available if you have the optional module *Honor/Memorial Tracking*. A tribute explains the reason gifts are being donated to your organization on behalf of an honor/memorial constituent. On this tab, you can track tributes set up for the honor/memorial constituent. Tributes can be given in honor, celebration, or in memory of someone, and are set up within those honor/memorials.

Let's pretend Jane is celebrating her 50th birthday. You can set up a tribute honoring Jane on the Honor/Memorial tab of her constituent record. Gifts can be donated in honor of Jane to your organization. You can track these on the Tribute tab of a gift record. In addition, many tributes can exist for one honor/memorial. For more information about *Honor/Memorial Tracking*, see The Raiser's Edge - Fully Loaded chapter.

Attributes tab

Here we are again! Just like we talked about before with constituent records, attributes on a gift record behave the same way. The beauty of attributes are flexible. They are useful bits of information you attach to a record to help further define the record you are working with. An example of an attribute attached to a gift record may be a beneficiary name, a deposit date, or a gift-in-kind type. Because you create attributes in *Configuration*, you can use them to customize *The Raiser's Edge* to suit your organization's needs.

Split Gift tab

When a donor chooses to split a gift in *The Raiser's Edge*, he is specifying that they want to spread their gift among campaigns, funds, or appeals of their choice. This is really convenient if you have a donor who wants to send in one check, for example, but wants the check to be applied to more than one campaign, fund, or appeal.

Gift Types in The Raiser's Edge

So what pops into your head when you think of the word "donation"? To some, that word may bring up thoughts of telethons or even people standing outside of shopping malls to take donations from shoppers. While these may be conventional ideas of what the donation process is, it is up to you as part of the fundraising community to understand that there are many other types of gift-giving, other than cash or pledge donations.

If a constituent donates something to your organization, then it is considered a gift. Gifts can include cash gifts, stocks and bonds, and even computer equipment or office space. In *The Raiser's Edge*, it's important to understand how to categorize each gift so that you can successfully track them.

Cash

A Cash gift is a gift paid using any form of cash including currency, personal or business check, credit card, and direct debit.

Pledge

A Pledge is a promise to make a future donation and can be paid in single or multiple payments called installments.

Don't Forget...

When you select Pledge in the **Gift Type** field on a gift record, the Installments/Payments tab appears on the gift record. On this tab, you can enter installment information for pledges.

Stock/Property

When a constituent donates stock or property, such as land, estate, or stock certificates, you can classify the gift as Stock/Property.

Gift-in-Kind

A Gift-in-Kind is a donation of goods or services for which you can easily assign a monetary value.

Other

Other gifts are miscellaneous donations that do not fall under one of the previous gift types. You may want to classify legacy or insurance gifts as Other gifts.

Recurring Gift

A Recurring Gift is a template used to create cash gift records at regular intervals. A recurring gift is a way for your donors to set up a donation on a recurring basis whether it's weekly, monthly, yearly, etc. All you have to do is find out how much your donors want to give and how frequently, then you can set up a gift "template" that will automatically allow the gift to "reoccur" over and over, depending on the frequency the donor wants.

Adding a Gift Record

Gift information is stored in the database in two ways. The first way is to work with gift information from a constituent record. From a constituent record, you can view existing gifts donated by the constituent. You can also view the gift date, type, fund, and amount for a gift from this tab, and you have the option of adding a new gift record right from the Gifts tab of the constituent record.

The second way to work with gift information is from the gift record itself, without going through the constituent record. Both ways of bringing up a new gift record are exactly the same and store the same information. Neither is better or faster than the other; *The Raiser's Edge* just offers two different ways to access the same information. For the purposes of this section, we will focus more on adding a gift by going straight to a new gift record, as opposed to adding a gift record from the Gifts tab of a constituent record.

▶ Add a gift record

1. On the Records page, click **Gifts**.

2. Click **New Gift**.

3. In the **Constituent** field, search for the constituent you want to add a gift for by clicking the ellipsis.

Did You Know?

Once a name is in the **Constituent** field, you cannot change it. If you need to change the name, close the gift record without saving and begin a new record.

4. Specify the appropriate information for the gift, such as the gift type, date, amount, campaign, fund, appeal, and payment method.

5. If needed, select solicitors by clicking **Solicitors**. Include the type of letter you want to send in response to this gift along with any benefits you want the donor to receive.

6. On the toolbar, click **Save and Close**.

Soft Crediting a Gift

Soft crediting a gift means to give another person or organization, other than the main donor, credit for the donation of a gift. A soft credit allows more than one constituent to share credit for a single gift without adding duplicate gift records in the database. It's perfect for those times when you and your college buddies want to give back to your dear ole' alma mater. You can each be soft credited for the total amount of the gift if you want.

You can soft credit numerous constituents and even send thank-you letters to each donor if you like. When you soft credit constituents for a gift, you can decide to split the credit evenly among all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution.
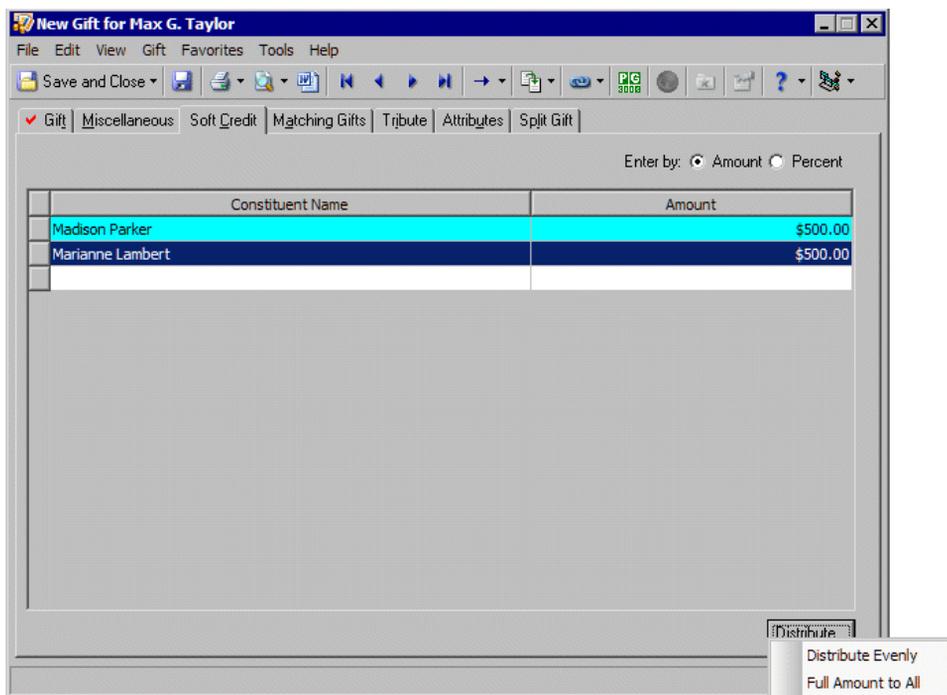
You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in your database. Say that Joe and Mary are married and each has a separate constituent record in your database. They send in a $50 donation every month, and each wants to be credited for the full amount of the donation. Instead of creating duplicate gift records in your database, you can create one gift record for Joe and soft credit Mary for the gift as well.

▶ *Soft credit a gift*

1. From a constituent's gift record, select the Soft Credit tab.

2. Select how you want the gift soft credited in terms of amount or percent.

3. In the **Constituent Name** field, enter the name of the constituent you want to soft credit for the gift. Remember, you can soft credit more than one constituent.

4. In the **Amount** field, enter the amount you want to soft credit for each constituent. If you choose to do so, all constituents can be equally soft credited for the full amount of the gift.

5. On the toolbar, click **Save and Close**.

Splitting a Gift

Splitting a gift is very common in nonprofit organizations. Often, a donor will send you a donation to be split among several different funds. For example, Mike sends a cash gift of $50. He wants half of that gift applied to the Building Fund and the other half applied to the Annual Fund. You can track Mike's split gift on this tab by entering the two funds and the amount to be applied each.

► Split a gift

1. From a constituent's gift record, select the Split Gift tab.

2. Select how you want the gift soft credited in terms of amount or percent.

3. Select the campaign, fund, and appeal to which you want to apply the gift.

4. In the **Amount** column, enter the amount of the donation you want to apply to this particular campaign, fund, and appeal.

5. In the next row, add any additional campaigns, funds, and appeals to which you want to also apply the gift, and enter the amount of the donation that you want to apply.

6. If you want to distribute the donation evenly among all the campaigns, funds, and appeals you selected, click **Distribute Evenly.**

7. On the toolbar, click **Save and Close.**

Adding an Attribute to a Gift Record

Remember earlier when we talked about attributes for constituent records? These constituent attributes are created in *Configuration*, and you apply them to a constituent record through the Attributes tab. Attributes for gift records work exactly the same way. You define gift attributes in *Configuration*. Once you define your gift attributes, you can add these gift attributes to your gift records. You do this using the Attributes tab on a gift record. Select the attribute specific to that gift record to store additional bits of information about a gift.
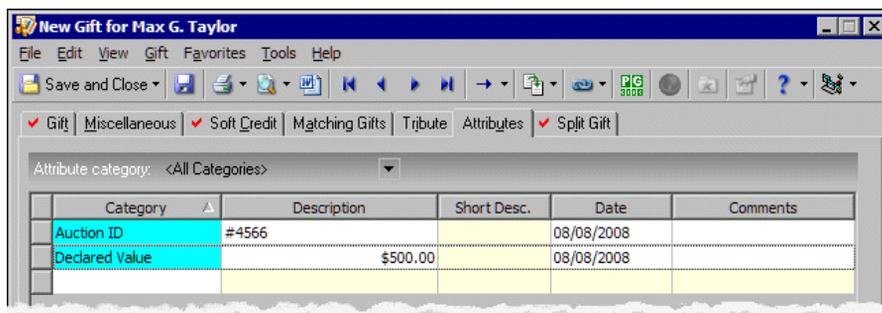
For example, you want to track business hours for your organization constituents. In *Configuration*, you can create an attribute category of "business hours" as well as several descriptions. On the Attributes tab of a gift record, you can track this additional information for your constituent.

▶ *Add an attribute*

1. From a constituent's gift record, select the Attributes tab.

2. Select a category and description for the attribute you want to add.

3. Specify a date and add any additional comments about the attribute. You can add more than one attribute for a gift record.

4. On the toolbar, click **Save and Close**.

Query: The Search for Answers

> "If you haven't any charity in your heart, you have the worst kind of heart trouble."
>
> - Bob Hope

In This Chapter...

▶ *Query User Options*
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The world is full of questions: "To be or not to be?" "Why are we here?" "Was I really going that fast, Officer?" Everyone wants *answers*, but as any detective will tell you, to get the right answers, you've got to ask the right questions. Asking questions is where *Query* comes in – you use it to ask questions of *The Raiser's Edge*. By framing your questions in the correct way, you can get the answers you need to help you include just the right information in mailings, reports, and loads of other functions throughout the program.

Query User Options

Before you get started working with queries, you can set a few user options to make your life easier. Like all user options, these settings affect workstations only when you log in with your password; they won't affect anyone else logged in under another password.

Don't Forget...

If you don't have security rights to change your user options, you can get your supervisor or someone with supervisor security rights to set them for you.

All user options are located on the Options screen. To access the Options screen, select **Tools**, **User Options** from the shell menu. Depending on where you are in *The Raiser's Edge*, the Options screen opens to different tabs. If it isn't already in view, select the Query tab. For now, we are only going to concern ourselves with the General query options. Select **General** in the box on the left and the General options become visible on the right.
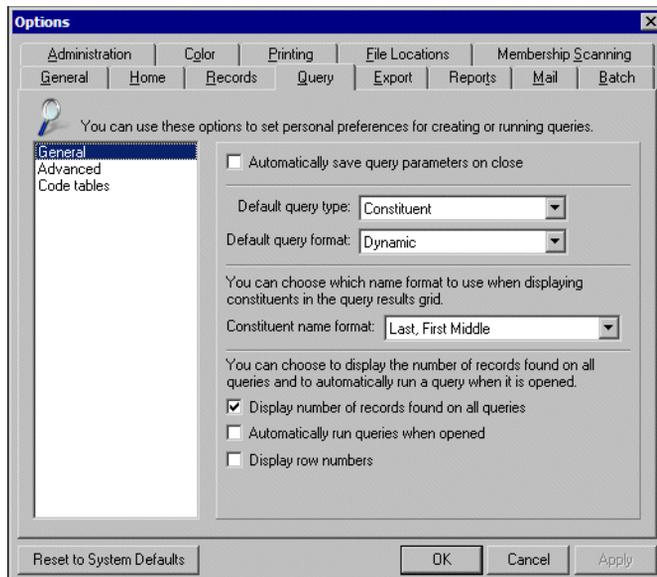
Go ahead and mark **Automatically save query parameters on close**. Parameters are all the stuff you're going to learn to set up in this chapter. By automatically saving parameters, you can reuse your queries instead of re-creating them each time you want to run them (a big time-saver). Also, go ahead and select "Constituent" as your **Default query type** and "Dynamic" as your **Default query format**. We'll discuss query types and formats in detail a little later, but for now suffice it to say that these are the most commonly used queries. Constituent queries let you base a query on any field in your database, and dynamic queries automatically update themselves every time you run them.

If down the road, you find you are running more, say gift queries than constituent queries, you can always come back and change the default. Okay, now you're all set to get rolling with queries!

Getting Information From The Raiser's Edge

Earlier, you learned how to enter data effectively and efficiently in *The Raiser's Edge*. Now you can use queries to get that information back out in useful ways. How? Good question! Say you're getting ready to hold your annual golf tournament. This brings up the logical question – who should you invite? Sure, you could invite everyone in your database, but what if there was a way to target only the constituents who you think would be most likely to attend?

Suddenly you remember setting up an attribute to track your constituents' interests (told you those attributes would come in handy). Finding out who is interested in golf is a good place to start in compiling a list of invitees to your tournament. So you need to ask *The Raiser's Edge* a question. Because you can't just say to the program "Hey, who likes golf?" (maybe that feature will be added down the road), *Query* is your messenger. You just tell *Query* what you want to know, and it runs off to check the database for you.

The Two Step Program

Creating and using queries effectively involves two main steps. Of course, these two main steps each have their own sets of steps, but keeping the big picture in mind helps when you're getting started with queries. First, you need to figure out the type of records you want to group together in the query, and you need to define the "criteria" of the query. In other words, you have to determine exactly what characteristics of the records you want to use to group them together. In the previous example, we wanted to include constituent records (type), but only those records that indicated an interest in golf (criteria).

After you select the record type and criteria, you are ready for the second main step: using the query in *The Raiser's Edge*. Although you can select to display certain output fields from within the query itself, the query is most effective as the basis for other functions such as reports and mailings. For example, you may want to create a Constituent Directory Report listing all your constituents who donated over $1000 in the last six months so you can give them a quick telephone call of appreciation. You can first create a query that groups these records together, then use that query as the basis for a report that includes each constituent with his or her address and phone number.

So your first step is to ask *The Raiser's Edge* to group a certain type of records together based on characteristics the records all share. Your second step is to ask the program to show specific information about these records in reports, mailings, or other functions. Using handy little functions called "operators" and some other nifty tricks, you can use queries to get just the information you need from *The Raiser's Edge*.

Don't Forget...

Query is not a reporting tool! Use queries only to group records. *The Raiser's Edge* offers a ton of reports you can use to get specific information. We'll cover reports in the next chapter.

Query Types

Choosing the right query type is the first step in getting the answers you want from your database. Figuring out what type of query you want to create is a fairly straightforward process. When you choose a query type, you are telling *The Raiser's Edge* to include a certain type of record in the results of the query. Only records of the type you select appear.

You can create queries based on major record types (constituents, gifts, etc.) or on tabs within some records, such as the Relationships tab of the constituent record or the Participants tab of the event record (if you have *Event Management*). The key is determining what type of record you want to narrow down in your query.

Did You Know?

Constituent queries contain both individual and organization records. For example, maybe you want to change the area codes for all donors (both individual and organization constituents) who reside or are based in the Miami area. You can use a constituent query to group these records. You can also create separate individual and organization queries. If you are planning a banquet and want to invite all individuals who have not bought a ticket to an event in two years, you can use the individual query type to group these individuals and export their mailing information to create an invitation letter. Organization queries are based on the organization constituent record. For example, if you are planning a new matching gift campaign and want to see how many of your constituents are matching gift organizations, you can use an organization query to group these records.

For example, say you want to print a list of the volunteers you invited to a meeting. The list actually contains volunteer records, but on what type of record should the query be based? Let's take a closer look at what each volunteer has in common – the meeting of course! Because the meeting is an action, the query should be based on that – so you would create an action query.

As another example, perhaps when you started creating funds, you entered some without an end date. Now, you want to put an end date on all your funds; you need to find all your funds that do not have an end date so you can add one. Obviously, to find these records, what type of query should you create? Of course, a fund query!

Filtering

Now is a good time to introduce a key concept you need to grasp when creating queries: filters. Queries are based on setting up various criteria. These criteria act as filters to screen out records until you are left with only the records you want. Earlier, when you asked *The Raiser's Edge* to group the constituents who donated over $1000 during the last six months, you were telling it to filter out everyone else.

Just like the filter in your coffee machine blocks grounds and the filter in your air conditioner blocks dust, the settings you specify for your query block all the records you don't want included. In the query, you only want certain results; you want all the other stuff left behind. You want to drink the rich delicious coffee, not the grounds. You want to feel the cool breeze, not breathe in the dust and cat hair. Applying filters gives you the ability to get exactly what you want and *only* what you want. Now, excuse me, I feel the sudden need to go make a pot of coffee and do some maintenance on my air conditioner.

Okay, I'm back. Earlier you learned how to select a type of query. What you didn't know is that when you select a type of query, you are actually applying the first filter to your query. For example, an individual constituent query automatically filters out organization constituent records.

Selecting a query type obviously affects the results of a query. For example, say your database contains one constituent record, Robert Hernandez. Wait, let's change that to *a* database instead of *your* database because hopefully your database actually contains hundreds or thousands of constituent records.

Robert has given three gifts so far this year. If you created a constituent query for all gifts given this year, the results would include only one record: Robert Hernandez, the only constituent in your database. However, if you created a gift query for all gifts given so far this year, the results would show three records, the three gifts Robert has given.

After you select the type of query you want to create, you are ready to pick a format and add other filters in the form of criteria fields and operators.

Time-Saver...

Use the fewest possible filters you need to get the results you want. The fewer filters you use, the faster your query runs. You may say, "but I've got a lot of "questions" to ask my database, so I need a lot of filters." No worries, you can just create two queries and merge their results! We'll get to merging soon...

Query Formats - Still Life or Still Kicking

Queries come in two formats: static and dynamic. Static queries are designed to give you a snapshot of how your data looks at a certain point in time. If you run a static query today or next year, the same results show up. Dynamic queries provide a glimpse of your data right now. If you run a dynamic query, any new records you've added (that meet the query criteria) since the last time you ran the query now show up in the results.

Static Queries - The Way We Were

Instead of giving you a shock you when you shuffle your feet across a carpet, a static query functions as a picture of your data. The data it gathers is stationary and does not get updated each time you run the query. For example, you may want to ask *The Raiser's Edge* which constituents gave gifts of $100 or more to your Annual Phonathon appeal. By making this query static, the information is presented as a snapshot of how your data stands at a certain point in time. Just as a photograph looks the same each time you view it, a static query presents the same information each time you run it.

Did You Know?

You can "refresh" or update a static query. More about that later…

Dynamic Queries - What Have You Done for Me Lately?

But say you want to see the changes, the fresh stuff, the latest news hot off the wire. Have we got something for you – the dynamic query! The dynamic query is on the move. Information you get from a dynamic query is updated each time you run the query. Using the earlier example of constituents who donate $100 or more to your Annual Phonathon Appeal, if you run that query on the first of June and again on the first of July, the second time you run it, anyone who donated $100 or more during June appears in the results. You don't even have to actually run the query for it to update. For example, when you use a dynamic query in a report, the next time you run the report, the query updates automatically.

You may think, "I'm always in motion, why would I ever need a static query?" Like a photograph, you may need it for record-keeping purposes. Say you want to send a special thank-you letter with a summer theme to all your constituents who donate during July; you may need to refer to the query on which this mailing is based again, but you don't want additional names added to it each time you run it.

Did You Know?

Dynamic queries search the database and include all records that meet the criteria each time the query is accessed. Because dynamic queries represent an ever-changing group of records, the exact number of records included does not appear as part of the query information.

Quick Tips for Choosing a Query Type and Format

When identifying groups for your query, consider these questions:

- ✔ If you want to group constituents, what do they have in common?
- ✔ What type of query will best group the information?
- ✔ Do you want to use this query regularly (dynamic) or only once (static)?
- ✔ Where will you use this query?

When selecting a query type, avoid these two common mistakes:

- ✔ Selecting an individual query instead of a constituent query when you want to include both individuals and organizations in your results. To group both individuals and organizations, create a constituent query.

✔ Selecting a constituent query instead of a gift query. To include specific gifts, create a gift query. A constituent query may group the correct records, but it groups the entire record and makes all the related gift information available (say in a report). Gift queries group only the specific gifts that meet your criteria.

▶ *Select a query type and format*

1. From your Home page or any other shell page, click **Query** on the Raiser's Edge bar. The Query page appears.
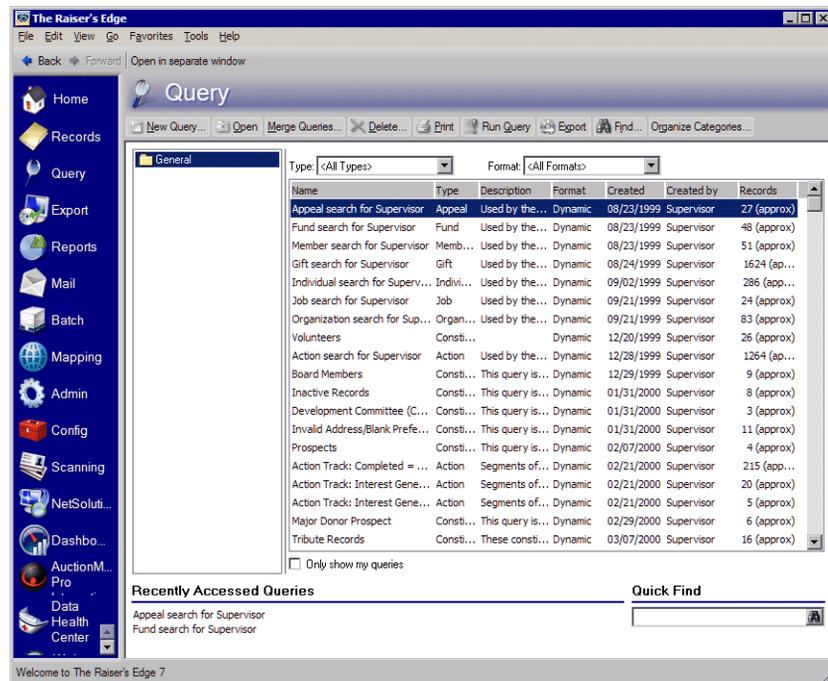
2. On the action bar, click **New Query**. The New Query screen appears.

3. Select an entry in the **Query Type** and **Query format** fields.

4. Click **OK** to continue creating your query.

The Pause that Refreshes - Updating Results in a Static Query

Okay, so you created a static query — a snapshot of your records at a given point in time. But now you want another snapshot of those records right now. Ordinarily, you'd probably use a dynamic query when you want the results to show new records, but you already created a static query, and you want to use all the criteria from it. What do you do? Get refreshed!

Refreshing a static query actually lets you update the information in it, despite the fact that updating information is more often associated with dynamic queries. Refreshing offers a safety net if you create an elaborate static query, then wish you had made it dynamic. Refreshing is a fairly advanced query function, so you may want to read the rest of this chapter and get a solid mastery of query basics before you attempt to refresh.

It's important to understand the difference between running a static query and refreshing it. As you recall, a static query is like a snapshot of your records. When you save a static query, *The Raiser's Edge* generates pointers called "keys." These pointers are attached to the records that met the specified criteria during the original query question.

If you make changes in your database and you want these changes to show up in a static query, you must refresh the query to include the new records and get rid of the old ones. If you just run the query again, you'll get the same snapshot of your data that you got the first time you ran the query. To refresh a query, select **Records**, **Refresh** from the menu bar.

Geek Alert

How do these pointers or keys differ between static and dynamic queries? In a query, the pointers to the fields that are flagged are associated with the unique field code. If you were to look at a *Raiser's Edge* query in Structured Query Language (SQL) — a standard sublanguage for managing databases — you would see a list of numbers, the field codes. After you save a static query, the pointers are saved and always point at the same associated field on the record every time you run the query. When you refresh a static query, any new records (their field codes) are added, and any old ones are removed from the list. The list stays the same until you refresh it again. With a dynamic query, the list is generated each time you run the query, but the list isn't saved. Even though you save the query criteria, the actual list of field codes (the flagged info on the record) is dumped each time. That's where the term "dynamic" comes from.

When you refresh and save a query, the new set of keys is saved. If you simply run the query again, the records included in the refresh are included, but no new records added since the last refresh are included.

Tabs on the Query Screen

After you select a type and format for your new query, the query screen appears. This screen contains four tabs where you can figure out exactly which records to include in your query, which fields show up as column headings in the results, and how to sort the results. These tabs contain the tools you use to actually build the query. Here's a brief rundown on what you'll do on each tab. Don't worry, you're not getting off that easy; we'll discuss them in detail in the following sections.
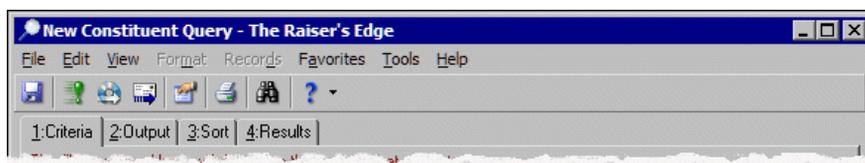
- Criteria tab – On this tab, you select the actual fields that determine which records appear in the results of the query. These fields are called (surprise) "criteria fields." For example, you may need an individual query to find all your constituents with a home phone number to use at a phonathon. In this case, the **Phone Type** field is your criteria field — a certain entry in this field ("Home") determines which records you want in your results. After you choose a field (or fields), you use tools called "criteria operators" to include only records with certain entries in those fields in your query. After you choose **Phone Type** as a criteria field, you use the criteria operator "equals" together with the entry "Home" to group all the records you need for your phonathon query.

- Output tab – Use this tab to select which fields you will see as column headings in your query results. You don't have to choose any output fields, but doing so generally makes your query more useful simply because you can view your results. Although it's tempting, don't go nuts adding lots of output fields; remember, query is not meant to replace reports. Also, keep in mind that the more output fields you choose on this tab, the longer your query will take to run.

- Sort tab – Use this tab to set the order of your fields in the results. For example, you can sort names in ascending order (alphabetical from A-Z).

• Results tab – Tah-dah! Use this tab to view the fruits of your labor. All the records that meet the criteria you set on the Criteria tab appear here, formatted and sorted according to your selections on the Output and Sort tabs. The way names appear is controlled by your selection of Constituent name format on the Query tab in User Options.

Query Criteria

After you figure out the type of record you want to include in your query results and whether the query will be static or dynamic, you need to use criteria to make sure only records with specific characteristics are included in your results. For example, are you asking *The Raiser's Edge* to group a specific set of constituent records such as those with a certain area code; group a set of gifts, maybe those given to a certain fund; or group a set of appeals, maybe all those that are ongoing?

Because, unlike the psychic phone hotline, *The Raiser's Edge* doesn't know what you're thinking unless you tell it, you have to offer it guidance in what criteria to use as it gathers results for your query. You offer this guidance using criteria fields and criteria operators. These two tools work together to help you filter your queries to show only the results you need.

In constituent queries, you can get the criteria ball rolling by unmarking checkboxes if you don't want inactive or deceased constituents or those without a valid address to appear in the results.

Criteria Fields

Criteria fields are the fields in a record you use to group records in your query results. Your results are made up of records that contain the same or similar entries in these fields. For example, say you want to see how many gifts over $100 were donated to your organization last week. You need to base this query on two fields on the gift record: the **Gift date** field and the **Gift amount** field.

You should be familiar with the fields in *The Raiser's Edge* so you can best determine what criteria to use in your queries. Selecting a criteria field is only the first part of setting up your query criteria. After you select the field, you must use criteria operators to weed out the actual entries in those fields.

Smooth Operator

If you can't find the information you need in a phone book, who do you call? The operator of course! Just like when you need a phone number, operators help you get the information you need in *The Raiser's Edge* (only you can't call these operators collect). Queries in *The Raiser's Edge* use several different kinds of operators. The first operators you need to learn about are the criteria operators.

Criteria Operators

Criteria operators are the workhorses of your information gathering efforts. Whenever you create a query or ask *The Raiser's Edge* to group records a certain way, you have to set the conditions a record needs to meet to be part of that group. In other words, say you've picked the criteria field you want to base your query on. Now it's time to make sure only records with certain entries in that field make it into your results. What's the next step? Just dial the operator — the criteria operator — to get the help you need.

Remember, you use criteria operators on the Criteria tab of the Query screen. In many cases, these operators give you the ability to construct mathematical equations to include specific records or ranges of records in your results. Wait! If you're anything like me, as soon as you read the word "mathematical" you broke out in a cold sweat. No need to worry, you don't have to dredge your memory for all that algebra you slept through in high school. This is the simple stuff — the stuff you learned in grade school — not the stuff you said you'd never use in real life.

Let's go back to our example of finding out how many gifts of at least $100 you took in last week. To simplify things further, let's narrow the query down even more, to gifts of at least $100 your organization has received period, with no specific time frame. This stripped-down query is based solely on an entry in the **Gift amount** field. It is the only criteria field you need to worry about to get the results you need from this query.

Now you have to specify an operator to use to get the results. You want to group gifts of at least $100, including those for exactly $100, so you can't use just "greater than $100." I'm sure you're already way ahead of me here — you need to use the operator "greater than or equal to" $100. Your equation says include gift amount >= $100. Or, if you aren't mathematically inclined, in plain English your query says "Hey, *The Raiser's Edge*, group together all the gifts we have ever received that are $100 or higher."

The Raiser's Edge offers a wide variety of other operators to help you get specific information from the criteria fields you choose for your query. Most operators work in tandem with a specific value you select. The above example, for instance, couples the "greater than or equal to" operator with the value "$100."

Many operators function as the opposite of each other. For example, you can base your results on records with last names that all begin with the same letter (or letters) or on all last names that don't begin with that same letter. Ah yes, the subtle yin and yang balance of nature appears at the strangest times.

Equals

When you choose this operator, the records included in your query must have the exact entry you set. For example, if you choose Constituency Code "equals" Board Member, only records with the exact entry of Board Member in the Constituency Code grid are selected.

Does Not Equal

When you choose "does not equal" as your operator, every record that does not match the value you set is included in the results of your query. For example, if you choose Constituency Code "does not equal" Board Member, the program selects every record that does not have Board Member entered as the constituent code.

Be Careful!

Use negative operators sparingly. They create twice the processing work of positive operators and therefore increase the time it takes a query to run. If possible, try to find a way to reverse the logic of the query and use positive operators instead. Sometimes this may involve merging queries, which is fairly advanced. It may be awhile before you are comfortable merging queries, but this information provides you with a glimpse of the things you can do once you become a query expert. Instead of using a single query with one negative and one positive operator, you can use two queries. For example, in one query you can use the "one of" operator for values you want to include and in a second query use the same operator to include records you want to negate from the first query. When you merge the two queries, you get the results much more quickly than if you had used a single query with a negative operator.

Greater Than

If you use "greater than" as your operator, the records you want to include in your results must have a value greater than the one you set. For example, if you select Gift Amount "greater than" $50, only records with gift amounts of more than $50 are included.

Greater Than or Equal To

Using "greater than or equal to" as your operator includes only those records with a value greater than or equal to the one you specify. For example, if you select Gift Amount "greater than or equal to" $50, only records with a gift amount of $50 or more are selected. This operator includes a value you select, in this case $50.

Less Than

When you use "less than" as your operator, you limit the records included to those with an entry less than the value you set. For example, if you select Gift Amount "less than" $50, only records with a gift amount of $49.99 or less are selected. Records with a gift amount of $50 are not included.

Less Than or Equal To

Using "less than or equal to" as your operator means all records included in your results must have an entry less than or equal to the value you set. For example, if you select Gift Amount "less than or equal to" $50, only records with a gift amount of $50 or less are selected. This operator includes a value you select, in this case $50.

One Of

Using "one of" as your operator means that, to be included, records must have at least one of the entries you set. If you consider your criteria an equation or sentence, the "one of" operator acts as the word "or" between the entries you select. For example, if you set Campaign Category "one of" Annual, Capital, and Event, records included must contain one of those campaign categories.

Not One Of

Using "not one of" as your operator means that records included must not contain any entries you define. For example, if you set Campaign Category "not one of" Annual, Capital, and Event, records included cannot contain any of the campaigns you defined.

Between

When you use "between" as your operator, the records included have to fall within a range you set. This criteria operator is *inclusive*. For example, if you set Gift Amount "between" $100 and $200, records with gift amounts between $100 and $200 are included. Gifts of exactly $100 and $200 are also included in the results.

Not Between

Using this operator means the records included in your query must not fall within a range you specify. This operator is *exclusive*. For example, if you specify Gift Payment Amount is "not between" $100 and $200, only records with gift payments of less than $100 and more than $200 are included. Gifts for exactly $100 and $200 are not included in your results.

Blank

If you use "blank" as your operator, the records included in your query cannot have an entry in the field you specify. For example, if you choose constituent ID is "blank", the program selects only records with an empty **ID** field. The "blank" operator is useful if you want to see which records have no entry in certain fields.

Is Not Blank

When you use "is not blank" as the operator, the included records must have an entry in the field you specify. For example, if you select constituent ID "is not blank", all records with an entry in the **ID** field are included.

Contains

Using "contains" as your operator includes records containing a defined value anywhere in the field. For example, if you use Last Name "contains" S, any records with the letter S anywhere in the **Last name** field are selected. You can use wildcard characters with this operator. We'll talk more about wildcards right after we finish with this list of criteria operators.

Does Not Contain

Using "does not contain" as the operator includes only records that do not have the defined entry anywhere in the field you specify. For example, if you select Last Name "does not contain" S, only records without an S anywhere in the **Last name** field are included. Like "Contains," you can use wildcard characters with this operator too.

Begins With

Using "begins with" as an operator means that records included must have an entry that begins with a value you define. For example, if you choose Last Name "begins with" Adam, all folks whose last name begin with Adam are selected (for example, Adams or Adamson). You can also use wildcard characters with this operator.

Does Not Begin With

When you use "does not begin with" as the operator, the records selected must not have an entry beginning with the value you define. For example, if you choose **Last Name** "does not begin with" Adam, only constituents whose last name does not have Adam at the beginning are selected. You can use wildcard characters with this operator.

Like

The "like" operator lets you use wildcard characters to replace a character or a set of characters in a field. This operator and the wildcard characters are really helpful if you are not sure of the spelling of a name or if you suspect something may be misspelled. For example, if you select **Last name** "like" B?rd, the program includes all records with a similar spelling (for example, Berd, Bird, or Byrd). We'll talk more about the "?" wildcard character (and all the others) at the end of this list.

Not Like

The "not like" operator includes only records that are not spelled like the entry you define. You can also use wildcard characters with this operator.

Sounds Like

Use the "sounds like" operator when you want to include records based on a certain field entry, but you aren't sure of the exact spelling of that entry. For example, you may want to add a note about a conversation you had over the phone with a constituent who says her name is Smith. However, this name is actually spelled Smyth, but is pronounced the same as Smith. When you query, if you search for "sounds like" Smith, the program finds the record. Again, you can also use wildcard characters with this operator.

Ask

The "ask" operator means Ask at Runtime. This operator lets you hold off on selecting specific values for your criteria fields until you actually run the query. This one is kind of an oddball compared to the other operators. It's also more complicated — enough to get its own heading. If you want to know more about the ask at runtime operator, see the following section.

Beyond the Basics: The Ask at Runtime Operator

The ask operator gives you the ability to postpone picking specific values for your criteria fields until the time you actually run the query. Hence the full name of the ask operator: "ask at runtime." This operator comes in handy for some highly specialized uses. For example, you may have a query you run on different dates. The criteria are the same except for the date. When you create this query, if you choose date fields as criteria fields and choose "<ask>" as the operator for these fields, when you run the query, an ask at runtime wizard appears. On this wizard, you can plug in date values for the fields you earlier selected the "ask" operator for.

At runtime, you can use any of the other criteria operators plus a new one: the "is <any value>" operator. The "is <any value>" operator (which is the default for Ask at Runtime) includes all possible entries (including blank) for the criteria field you selected. It essentially acts as a combination of the "blank" and "not blank" operators. So, say you create a query with **Gift type** as a criteria field using "ask" as an operator. When you run the query, the ask at runtime wizard appears, and the **Gift type** field criteria operator defaults to "is <any value>". Running the query now includes all gifts of every type, as well as gifts with no entry in the **Gift type** field. Now that's one smart wizard!

Wildcards - Not Just for Poker Anymore

In poker you have deuces and one-eyed jacks. In *The Raiser's Edge* it's ?, *, and [ ]. But in both, the idea is the same — substituting one thing for another. As you saw in some of the criteria operator descriptions, you can substitute special "wildcard" characters in place of words or parts of words in your searches. Wildcards are extremely helpful when you are not sure how a name is spelled or when you suspect something is misspelled (in *The Raiser's Edge* anyway; spelling is usually not too important in poker).

Question Mark (?)

You can use the question mark symbol to replace a single character. By typing a question mark within a word, you are asking *The Raiser's Edge* to search for every possible spelling of the word with the question mark in that specific spot. You can even use more than one question mark within a word. For example, if you want to group all constituents with a last name such as Joiner or Joyner, you can use the criteria field **Last name**, with the operator "like", and value Jo?ner. The query then includes all constituents with the last name Joiner or Joyner. For that matter, the results will also contain any constituents named Joaner, Jobner, Jocner, Jod… well, you get the idea.

Asterisk (*)

You can use the asterisk to replace a series or group of characters. For example, to group all constituents with a last name ending with the letters "son," you can use the criteria field **Last name**, the criteria operator "like", and the value "*son". The query includes all constituents whose last name ends in "son," such as Simpson, Henderson, and Johnson.

Brackets ([ ])

Use the brackets to look for a range of characters or to locate several characters. For example, you can use the criteria field **Last name**, the criteria operator "begins with", and the value "[A-C]" to group all constituents with a last name beginning with the letters A through C.

When you use the brackets with a comma between characters, you group records with the specific values listed. For example, if you select the criteria field **Last name**, the criteria operator "begins with", and the value "[A,C,F]", the query includes all constituents with last names beginning with A, C, and F, but not those with last names beginning with B, D, and E.

Don't Forget...

Successfully using wildcards with criteria values depends on the field the values apply to. For example, Constituent ID is an alphanumeric field in *The Raiser's Edge* — meaning its values can consist of letters, numbers, or both. Alphanumeric fields are controlled by certain placeholding rules, so you have to be really precise when you use wildcards for these values. If you want Constituent ID 2345 to show up in your query, using the value 2? in the query does not work. You need to use 2??? to include the ID in your query results. You'll probably have to experiment with each field type — text, alphanumeric, date, etc. — to get exactly the results you want from wildcards.

▶ *Select query criteria fields and criteria operators*

1. On the Query screen, select the Criteria tab. Remember, you can access *Query* by clicking it on the Raiser's Edge bar. To get to the Query screen, you have to specify the type and format of your query first.

2. Under **Available Fields**, you can use the **Show** field to narrow down the available fields that appear in the box. The categories and available fields vary according to the type of query you are creating.

   When you select a category in the **Show** field, only fields in that category appear as choices for your criteria fields. If you are unsure which category the field you want to use appears in, leave the default entry, "<All>", in the **Show** field. This means all fields in the type of record you chose to base the query on are available in the **Show** field.
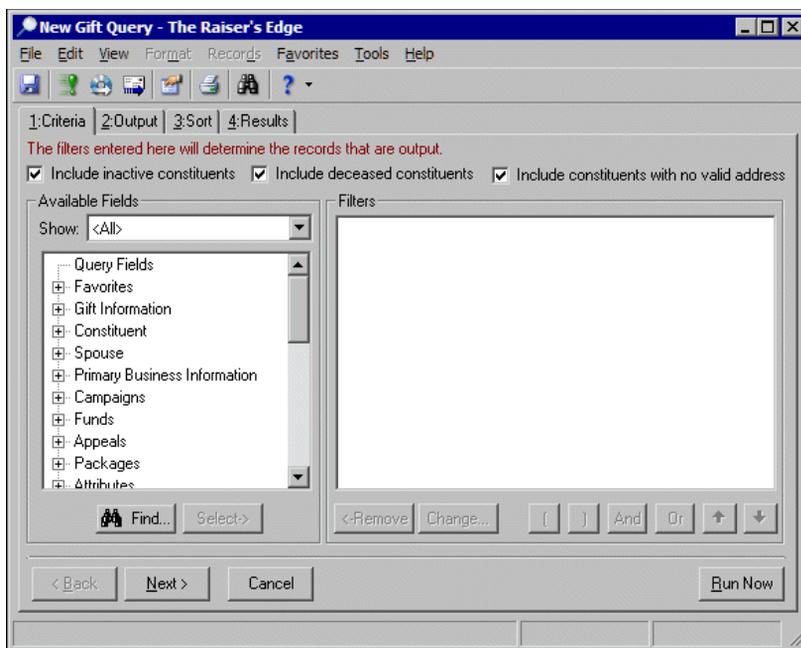
3. When you locate a field you want to use as a criteria field, select it and click **Select**. You can double-click the field name or just click it and drag it into the **Filters** box. The Edit Field Criteria screen appears so you can choose a criteria operator.
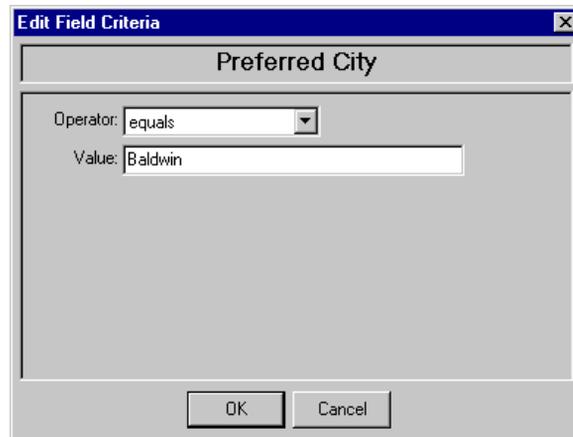
4. The Edit Field Criteria screen varies according to the criteria field you selected, but essentially you have to do two things on this screen.

    First, choose an **Operator**. Your choice of operator determines what else appears on the screen. Second, plug in a value for the operator to work with. For example, if you choose the operator "equals", for a field such as **Gift amount**, a **Value** field becomes available so you can enter an amount. If you pick the "equals" operator with a date, a **Value** field appears with a variety of options such as today, tomorrow, and this week while another **Value** field appears with a calendar you can use to select a specific date, such as April 15, 2008. Other operators provide different fields for you to use.

5. After you select your criteria fields and criteria operators, you can use combining operators to make your query even more useful. For more information about combining operators, see the next section.

Combining Operators

You're probably feeling pretty sure of yourself now. You understand the query types and formats, you know how to choose criteria fields and the operators that work with the values in these fields, you even know how to use wildcard characters. You've got this query thing down! But don't get too big of an ego yet, because now it's time to introduce another element that can make your queries even more powerful: combining operators. By learning to use combining operators, you can make your queries more useful by honing in on exactly the information you need.

Combining operators combine two separate sets of criteria to make one new criterion. The criteria operators are the buttons along the bottom of the **Filters** Frame on the Criteria tab of the Query screen.

These buttons represent characters (such as parentheses) that provide links between your criteria and help further filter the records included in your query. Whenever you choose more than one criteria field, you have to use a combining operator to show the relationship between the criteria. By using combining operators, you help *The Raiser's Edge* answer questions such as "Is it okay if only one of the criteria is met, or do they all have to be met?"

Geek Alert

Some of the combining operators are key to creating not only successful queries, but to creating *The Raiser's Edge* itself. Many of the same operators you use to combine your query criteria are also used by programmers to perform computing functions. Just think, by becoming an expert at using combining operators, probably in no time you'll be programming your own version of *The Raiser's Edge*. Well, maybe not, but you will be using some of the same tools that programmers use to make the code do what they need it to do. But instead of code, you'll be using the combining operators to get your database to group the information you need.

Three combining operators are available.

And

You can use the **And** button between criteria fields to specify that records must meet both criteria to be included in the query results. For example, if you use the criteria field **Last name**, the operator "equals", and the value "Smith" **And** the criteria field **Constituency Code**, the operator "equals", and the value "Board Member," the query results include all constituents whose last name is Smith AND who are board members. The records have to meet *both* criteria to be included in the query. When you use more than one criteria field, the combining operator defaults to **And** unless you specify another operator.

Or

Using the **Or** button between fields indicates records can meet either criteria to be included in the results. For example, if you use the criteria field **Last name**, the operator "equals", and the value "Smith" **Or** the criteria field **Constituency code**, the operator "equals", and the value "Board Member", the query results include all constituents whose last name is Smith OR constituents with a constituency code of board member.

Parentheses ( )

Using the parentheses buttons makes two separate pieces of criteria into a whole. If you use the following criteria: **State** "equals" South Carolina **And** (**Constituency Code** "equals" Board Member **Or** Gift Amount "greater than or equal to" $1,000) to be included in results, a record must first have South Carolina as a value in the **State** field, and it must also have either a constituent code of Board Member or a gift amount of $1000 or more. In this case, records must meet the first criteria and at least one of the criteria inside the parentheses.

▶ *Use combining operators*

1. From the Query screen Criteria tab, select the criteria fields and operators you want to use in your query. The criteria appears in the **Filters** box.
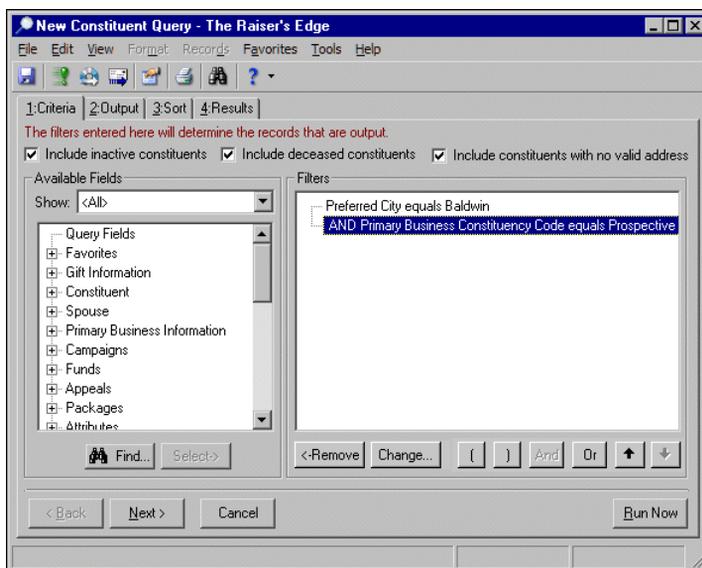
2. At the bottom of the **Filters** box, click the button representing the character you want to use as a combining operator. If you selected multiple criteria and do not choose a combining operator, **And** automatically defaults as combining operator.

3. After you select a combining operator, select where you want to place it in the **Filters** frame. When you place the combining operator between two criteria you already selected, the two criteria are combined to form a new set of criteria.

Output Fields

Query output is a bonus, an add-on, a plus. Setting up query output fields is basically "for your viewing pleasure." Just because you don't select any output fields doesn't mean you won't get results when you run a query. The output fields are just a way for you to do a "quick check." Output fields are necessary only to view query results, not to make the query available in other areas of *The Raiser's Edge* such as *Reports* and *Mail*.
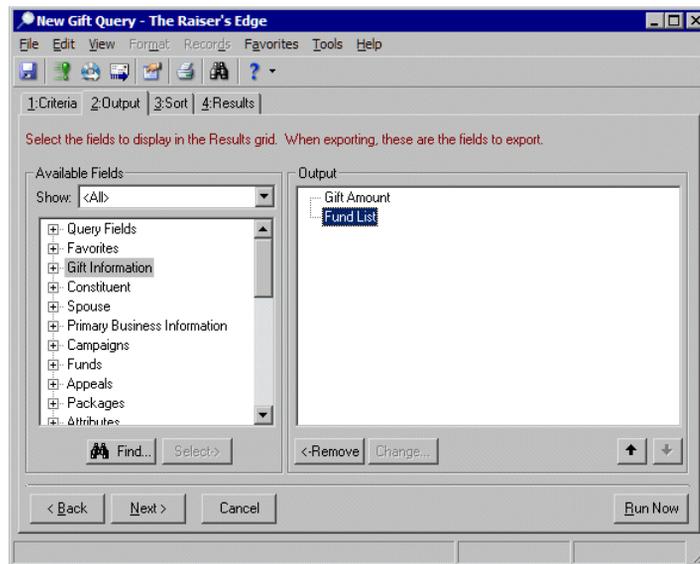
Did You Know?

The fewer output fields you select, the faster your query runs.

▶ Select output fields

1. From the Query screen, select the Output tab.

2. Available output fields appear on the left. Select a field you want to include as output and click **Select**. The field appears in the **Output** box on the right. You can also select a field and use your mouse to drag it to the **Output** box.

3. Repeat step two until you have selected all the fields you want to include as output for the query.

Sorting Query Results

Sorting is purely for your convenience. You do not need to sort your query results, but often doing so makes them much more useful. If you're in a hurry and your query results don't necessarily need to be sorted, don't sort them. This makes the query run faster and maybe your boss will let you go home early.

Did You Know?

Here's something interesting you may want to consider when you enter constituent records if you usually sort your query results. When you enter a backslash (\) in the constituent name on a constituent record, Query sorts beginning with the first character after the backslash. Say you've got an organization called The Wembley Group. If you enter The \Wembley Group in the **Org Name** field on the Org 1 tab, the record is sorted using "W" instead of "T."

▶ *Sort query results*

1. From the Query screen select the Sort tab. Available sort fields appear on the left.
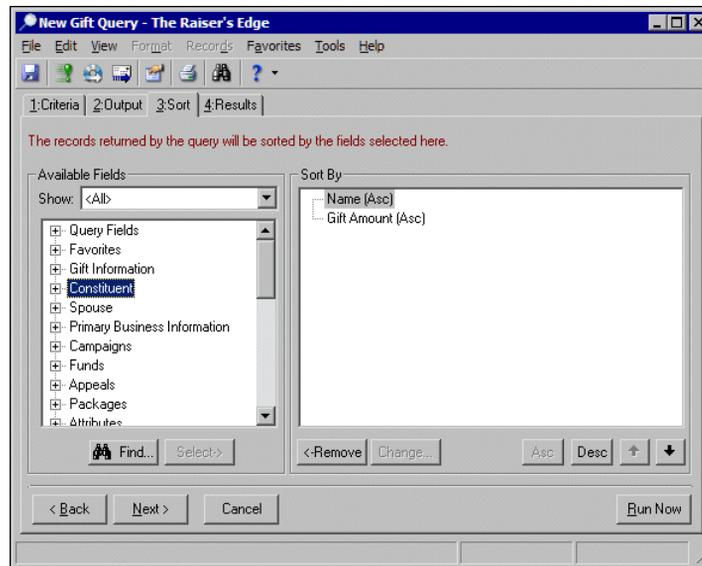
2. Select a field you want to sort and click **Select**. The field appears in the **Sort by** box on the right. You can also select a field and use your mouse to drag it to the **Sort By** box.

3. Repeat step two until all the fields you want sorted appear in the **Sort By** box.

4. Click **Asc** or **Desc**, depending on whether you want the results sorted in ascending or descending order. You can also use the up and down arrows to arrange the sort order.

Running the Query

Now that you've done all the hard work, it's time to view the fruits of your labor — time to actually run the query. On any of the Query screen tabs, click the **Run Now** button or just select the Results tab. Depending on how many filters you used, how many output fields you selected, and whether or not you opted to sort the results, the query can take anywhere from seconds to quite a bit longer to tally the results. After the query runs, select the Results tab (if you didn't already). On this tab, the records that met the criteria you set are displayed in all their glory. Of course, the records appear according to your selections on the Output and Sort tabs. Look at your query results and take a moment to bask in your accomplishment.

Troubleshooting Your Results

So you're looking at your query results and you see a few things are showing up that you weren't expecting. You need a quick way to check out the settings you created for the query. Time to run a control report. Control reports contain detailed information about the query, including type, format, criteria fields, criteria operators, sort fields, output fields and lots of other stuff. The report can be really helpful if a query is not producing quite the results you want. To print a control report, from the menu bar select **File**, **Print**. Then select **Control Report**.

Don't Forget...

Before you ever delete a query, you should print a control report of it for reference purposes. That way, if you change your mind and decide you really need the query after all, you can refer to the report to easily re-create the query.

Now That You've Created a Query, Please, Please Read This...

Don't dive into shallow water; don't run with scissors; don't eat the yellow snow — all good nuggets of advice. Add this one to the list: use easily recognizable names for your queries when you save them. You've just created the perfect query. You came up with just the right combination of criteria fields and operators to make a masterpiece that gives you exactly the information you need. You plan on using this baby repeatedly down the road. First, you need to save it. You already set a User Option that automatically saves the parameters (all your settings) when you close a query, so now you're being asked to give it a name and description. This is easy, but critical. It's crucial that you take a minute or two and give your masterpiece a name that makes sense and a description of exactly what the query is used for. I can't say it enough! Taking a minute now will save you a lot of trouble down the road. You don't need to write an opus, just something simple like "Funds with no ending date" for a name and "These funds do not have an end date specified" for a description will work just fine.

Why bother with this, you ask? When you're in a hurry, it may seem like a good idea to just give your queries a number for a name and maybe no description at all. Hey, you haven't made that many queries yet right? Here's the problem, right now, you may not have many queries — you may even be able to remember which ones the first few numbers belong with. But someday, you're going to have dozens of them, and believe me, you won't remember the difference between query number 1 and query number 62. Giving your queries an easily recognizable name and description is crucial to using them down the road.

When you save your queries, you can organize them by category. On the Query page, categories appear as folder directories. For example, you can organize queries in categories such as by user or the intended use. To create and organize your query categories, select **Organize Categories** from the menu bar of the Query page.

Additionally, when you save your queries, you can mark a checkbox so that no one other than you can run the query or make changes to it. You'll probably usually want to make the query available for everyone else to run, but it's up to you to decide whether or not you want to let other folks make changes to it or not.

Making Query Your Own – Custom Settings

Now that you've named and saved your query, you'll want to use it all the time so you need to make it easy to get to. How about putting it right on your Home page? What could be easier to get to than that! You can also create some settings that make it easier to create new queries.

Playing Favorites

Earlier in the "Basics" chapter, you learned how to add records and other items to your list of "Favorites." If you have a query you use or edit frequently, consider adding it to your list of favorites so you can access it directly from your Home page to save time.

You can also mark the fields you use most often in queries as favorite fields. These aren't like the Favorites that appear on your Home page, but the idea is the same — easy access. You can access a list of your favorite fields from the Criteria, Output, and Sort tabs, so you don't have to search all the field categories to access the particular fields you want to use in your query. You can create your list of favorites from an existing query or from a new one. To add a field as a favorite, select **File**, **Organize Favorite Fields** from the menu bar. The Favorite Fields screen appears, and you can use the arrow button to move the fields you want into the **Fields to Include** box. You can also add a field by right-clicking on it and selecting **Add to Favorite Fields** from the right-click menu. After you add fields to your list of favorites, they appear under the Favorite category in the **Available Fields** box when you open an existing query or create a new one.

Moving into Traffic - Merging Queries

Anyone who drives on busy highways knows all about merging — the process of making two streams of traffic into one. This is the same idea behind merging queries. Simply put, merging queries means combining two separate queries (referred to as the primary and secondary query) to create a new third one. Merging lets you get a combination of records from two existing queries. Merging is especially useful for creating complex queries. Frequently, it's more manageable to create two simple queries and merge them instead of creating one giant query. The two queries you use to create the new merged query remain intact and can still be used independently. You can mix and match formats when you merge (one can be dynamic and the other static), but you can't merge different type queries. For example, merging a constituent and a gift query is a no-no. Merging queries is based on yet another type of operator — the merging operator, of course.

Don't Forget...

If you are creating two queries only for the purpose of creating a merged query, be sure to save them even if you don't plan to use them individually. You can add more output and sort fields to a merged query after you run it. However, the only way to modify the filters in a merged query is to modify the primary and secondary queries and run the merge again. If you get rid of the primary and secondary queries and later want to change criteria, you have to start over.

Query Operators, the Final Chapter: Merging Operators

Like criteria and combining operators, merging operators give you a hand with refining the information that appears in your query results. Specifically, merging operators determine how your queries are merged and what records are included in the final merged query.

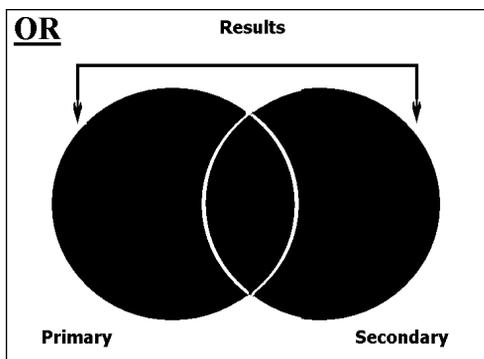You can use the following operators to merge queries.

AND

Using this operator means only records that appear as results for both queries are included in the final merged query.
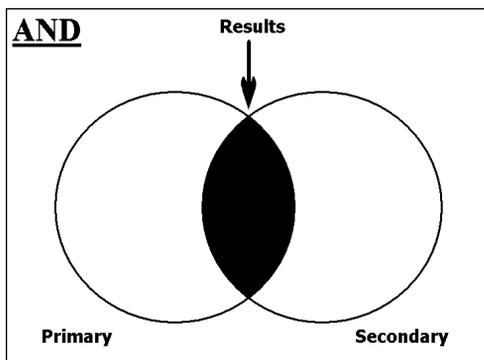
OR

Using this operator means that records included in either query are included in the merged query. If a record is included in both records, it only appears once in the merged query results.

XOR

In addition to being the only operator with a name that sounds fitting for a superhero, XOR is essentially the opposite of AND. When you use XOR, the merged query contains only records appearing in one query or the other, but not records appearing in both. Any records that appear in both the primary and secondary queries are filtered out of the merged query results.
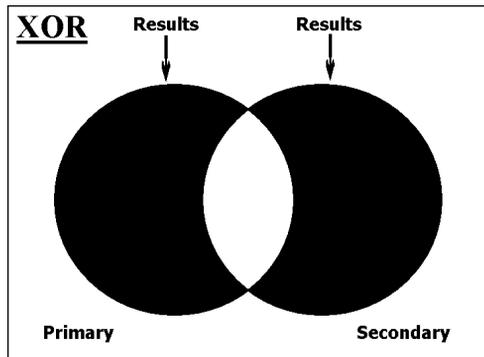

SUB

Using the SUB operator means the merged query contains records contained in the primary query minus those contained in the secondary query. Unlike the other merging operators, the order of the queries is important when you use the SUB operator. All records that appear in the secondary query and records in both queries are eliminated from the final query.
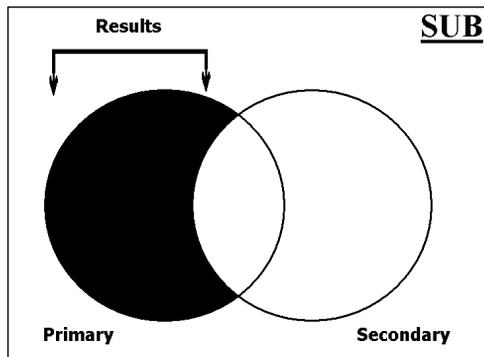
▶ *Merging Queries*

1. From the Query page action bar, select **Merge Queries**. The Merge Queries screen appears.
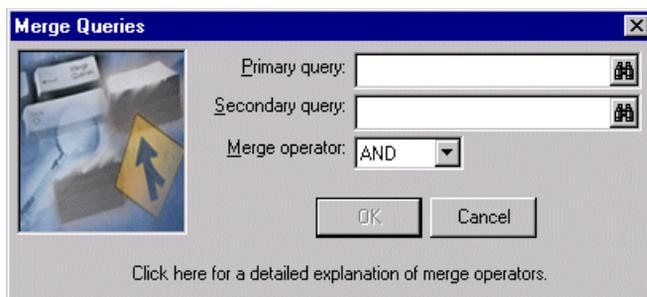
2. Enter the name of the **Primary** and **Secondary** queries you want to merge.

3. Select a **Merge operator** and click **OK**. The Query screen appears with three tabs: Output, Sort, and Results. Use these to create the settings you want to use for the merged query.

4. When you select the Results tab, a message tells you that a merged query must be saved before it runs and asks if it's okay to generate keys for the query. Click **Yes**.

   You are then asked to save and name the query. The **Description** defaults in as the titles of the primary and secondary queries separated by the merge operator you selected. Depending on the type of query you are creating another message may appear telling you how many keys were created (records were included in the results).

5. Click **OK** to close the message or Save Query As screen. The query results appear according to your selections on the Sort and Output tabs.

Miscellaneous Query Tips

- ✔ You can search for constituent birthdays using the fields year born and month born instead of using wild cards with the operator Like.

- ✔ To display constituents' cumulative gift amounts instead of individual gifts, select Gift, Summary Information, Total Amount as a filter.

- ✔ To determine how to credit soft credits or matching gifts related to a gift in your query, select **Edit**, **Properties** from the menu bar and select options for Soft Credit or Matching Gift.

- ✔ Click **Run Now** to rerun a dynamic query and include recent database changes. Select **File**, **Refresh Static Query** from the menu bar to include changes in a static query.

- ✔ To create a query of individual records that have nothing in common, choose Record ID as the filter and One Of as the operator. Press **F7** in the first value field and search for the record you want to include. Repeat these steps for each record you want to include.

- ✔ **Merged Queries -** It is best to save the original queries used to create a merged query. The only way to modify the filters in your merged query is to modify the primary and secondary queries and run the merge again. If you delete the primary and secondary queries, you have to start over.

- ✔ **Output Queries -** To access an output query you created in *Reports*, create a new gift or constituent query and select **Edit**, **Properties** from the menu bar. Mark **Select from Static Query** and click the up arrow to select the query. The only way to modify the original query criteria is to run the report and recreate the output query.

- ✔ Let's say this together: Don't use query as a reporting tool! *The Raiser's Edge* offers a ton of reports you can use to get that information. We'll talk about reports in the next chapter.

Getting Your Report Card: Raiser's Edge Reports

> "He who bestows his goods upon the poor, shall have as much again, and ten times more."
>
> - John Bunyan

In This Chapter...

▶ Where Do I Begin?
▶ Report Categories
▶ Selecting and Creating a Report
▶ Report Tabs
▶ Formatting the Report
▶ Previewing and Running Reports

Report. Just mentioning the word is enough to bring back nerve-wracking school day memories of reading book reports in front of Mrs. Huffelblad's class or going sleepless the night before report cards came out, dreading that inevitable D in algebra. Some people get the same sweaty palms and churning stomachs at the prospect of creating reports in *The Raiser's Edge*. If you happen to be one of those people, don't despair. Reports are your friends! Unlike the book reports that got you teased by your classmates or the report cards that got you grounded by your parents, your *The Raiser's Edge* reports will earn praise from your co-workers and undying gratitude from your boss.

Report User Options

As with most other main areas of *The Raiser's Edge*, reports have some user options you can set to streamline functions and help you work more efficiently. Remember, user options are based on user name and password, so they affect any workstation you log into. But your user option settings don't affect anyone else and they only affect a workstation as long as you are logged into it.

All user options are located on the Options screen. To access the Options screen, select **Tools**, **User Options** from the shell menu bar. Depending on where you are in *The Raiser's Edge*, the Options screen opens to different tabs. If it isn't already selected, select the Reports tab.
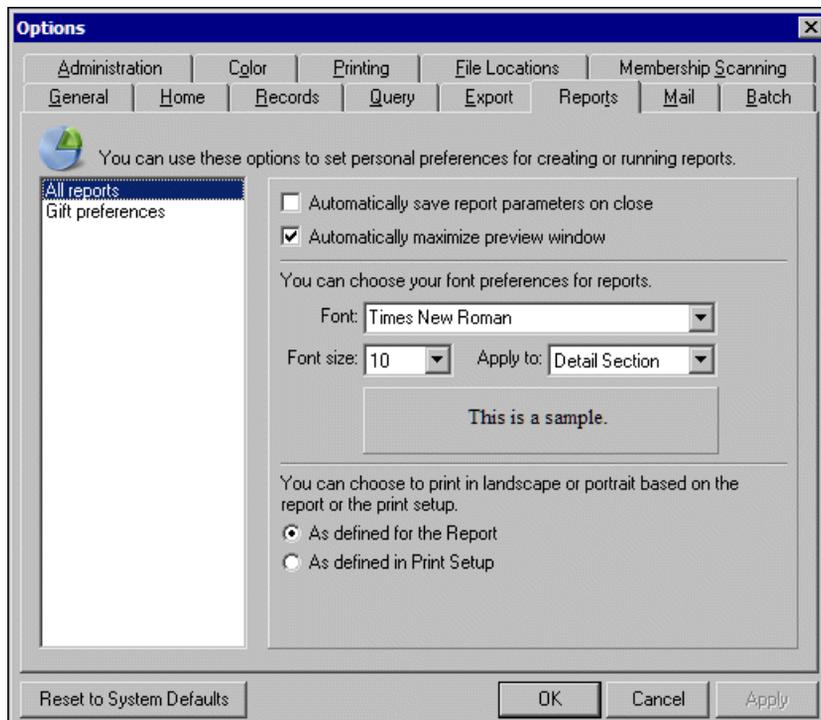
User options for reports have two main areas: all reports and gift preferences. Let's start with **All reports**. If it isn't already highlighted in the tree view, select it now. Go ahead and mark **Automatically save report parameters on close**. You may already be familiar with this checkbox from other sections of this book. Parameters are all the features you put in your report (the stuff you're going to learn about in this chapter). By saving parameters, you can use the report over and over again.

Next, you can set some defaults to define how your reports look. You can select whether to automatically maximize the preview window. Also, if you want to use a default font and size other than 10 pt Times New Roman, you can do so here. You can also specify whether these font settings affect only the "Detail" section of the report (the results), or the entire report — the detail section as well as title, headings, and the like. Keep in mind that you're only setting defaults. Just because you select 12 pt Arial as your font here doesn't mean every report you run for all eternity has to use those settings. You can still change font settings in each individual report you create.

You can also choose to select the page orientation from the report or in the Print Setup screen. Select **As defined for the Report** to set the orientation on the Format tab along with other settings that determine how the report looks. Again, these are only defaults, and besides, many reports don't let you choose between portrait and landscape printing; they only print one way or the other.

Select **Gift preferences** from the treeview on the left.

To increase the accuracy of your reports, you'll probably want to mark **Include anonymous gifts**. Then you can specify whether the word "anonymous" or the constituent names appear with anonymous gifts on reports. Usually, to be on the safe side, you should not include constituent names for anonymous gifts; if donors want to be anonymous, let them stay anonymous.

Finally, you can select a **Currency filter** for your reports. This is kind of complicated. Say you want to display gifts in pounds; if you select "Pounds" here, only gifts donated in pounds show up in your reports. To further complicate matters, the gifts are actually displayed in dollars as established by the conversion rate for pounds your supervisor entered in *Configuration*. Of course, if you're only displaying gifts in one type of currency and you receive gifts in more than one type, your reports aren't going to be very accurate. You're probably way ahead of me here — leave this field blank! It does have some highly specialized uses, but if you're lucky, you'll never need any of them.

Where Do I Begin?

First you need to get to the Reports page. To do so, click **Reports** on the Raiser's Edge bar. Voilá, welcome to the main reports page. Look at all those categories!
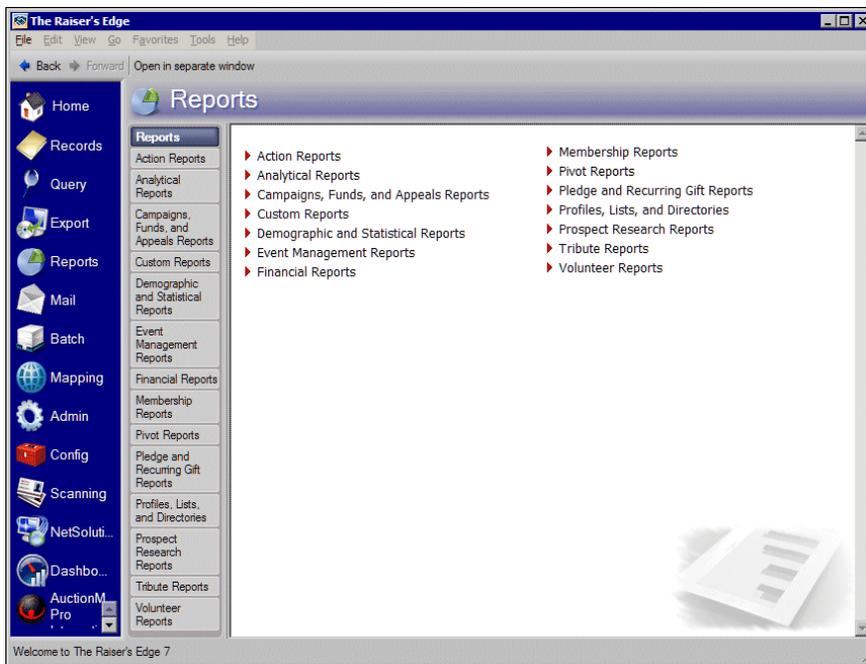
When you're creating a report, you have to make a key decision right off the bat: what category of report do I need? Then you have to immediately make another major decision: what type of report do I want to create? There are lots of report categories and lots of reports in each category so this can be a bit tricky, but fortunately, most of the categories and report names are pretty straightforward. For example, say you want to examine the effectiveness of some of your appeals. Aha, the Campaigns, Funds, and Appeals Reports category seems a likely choice. When you access it, what do you see? The Appeal Performance Analysis of course! Boom, you're ready to go. Now all you have to do is create the report.

After you select a category and type, creating a report is not too much different from creating a query, which you learned all about back in the Query chapter. In fact, you can use a query to limit the potential records that appear in a report. Just like with queries, in a report you filter out all the dirt, sticks, and rocks leaving only the "gold" — the records you want to include in the report. Unlike queries, reports have an additional step: you must format the way the report looks.

The Raiser's Edge gives you all sorts of awesome formatting options you can use to create a report of such beauty that your director is sure to give you a raise. Or if not a raise, at least treat you to lunch. Well, maybe the report will just get you a pat on the back, but that's good too!

Report Categories

The Raiser's Edge includes tons of standard reports to help you produce and view the information you need quickly and easily. To make creating a specific report easier, similar reports are grouped into categories. In *The Raiser's Edge*, reports are divided into a total of 14 categories (although some categories are available only if you have certain optional modules). We'll go over every category in detail now.

Action Reports

Actions are communications you have with your constituents. An action can be past, current, or future. By entering all contacts made, you establish a history of communication between your organization and the constituent. Examples of actions include telephone calls, meetings, lunch dates, e-mail, and letters.

Action reports track action assignments for each *Raiser's Edge* user. You can produce a list of actions assigned to users or solicitors, produce summaries of constituents assigned a particular action type, or print a detailed constituent action history.

Analytical Reports

Analytical reports, as the name may lead you to believe, help you analyze things. You can analyze information such as the giving habits of your constituents and the performance of your solicitors. Each analytical report provides very specific information on each subject. For example, the Non-Contributors Report finds constituents who are not donating to your organization. The Solicitor Performance Analysis helps you monitor the results of your solicitors' efforts.

Campaigns, Funds, & Appeals Reports

Campaigns, Funds, & Appeals reports track the progress of your organization's (Surprise!) campaigns, funds, and appeals. These reports help you analyze the success of your fundraising efforts. By selecting specific information, you can compare costs versus income; compare actual income to the goal; or produce a list of campaigns, funds, and appeals recorded in your database.

As you may recall from the records section, campaigns are your overall objectives for raising money; funds identify where gifts and pledges should be recorded for financial purposes; and appeals are the solicitations that bring in your gifts.

Custom Reports

Chances are, you won't work with Custom reports until you are very familiar with *The Raiser's Edge*. Custom reports are different from other reports in *The Raiser's Edge* because they are based on reports created in another program, Crystal Decision's *Crystal Reports* (which comes with *The Raiser's Edge*). If you need to gather information not included in existing *Raiser's Edge* reports, you can use *Crystal Reports*.

After you create a report in *Crystal Reports*, you can use Custom reports to link the *Crystal Reports* file with its *Raiser's Edge* export file. You can then save the linked report in your database, where all users have access to it.

Demographic & Statistical Reports

These reports can be a bit tough to get a handle on. Demographic & Statistical reports are all about numbers. Because these reports contain only numerical information, constituent names do not appear in them.

You can use Demographic & Statistical reports to summarize information useful in determining how, when, and where gifts are raised. The reports provide summary totals, percentages, and averages of gifts or donors based on the fields you select to include in the report. For example, using Demographic & Statistical reports, you can find out the day or month that produced the greatest income, the ZIP Code with the highest average of giving per constituent, or a geographic breakdown of where your constituents live.

Event Management Reports

Available if you have the optional module *Event Management*, Event Management reports help you track every aspect of your special events from seating arrangements to dinner preferences, from sporting event rosters to specific lodging information. You can compare event costs to the income generated, track seating and lodging, and determine the performance of your solicitors for a particular event.

Financial Reports

Once again, the name of these reports pretty much tips you off to what you'll find in them. Financial reports help you evaluate the financial position of your organization. Detail and summary reports give you a clear picture of the fiscal standing of your organization. Specialized reports track specific gift types. Your business office can use Financial reports to document such things as cash received. You'll probably be in this category a lot!

Membership Reports

Available if you have the optional module *Membership Management*, Membership reports help you better manage your membership groups by tracking memberships, analyzing membership activity, and creating lists and directories of members. In addition, you can locate lapsed members, drop members not responding to renewal notices, and examine trends in memberships.

Pivot Reports

PivotTables (a Microsoft component "bundled" within *The Raiser's Edge*) are tools you can use to create custom summaries of your information by dragging and dropping information previously gathered using a query. With these interactive tools, you can analyze data and create summaries and reports.

Did You Know?

If you like working with Microsoft *Excel*, you will probably be comfortable working in Pivot reports. The PivotTables that make up these reports are based on *Excel*.

Pledge and Recurring Gift Reports

Pledge and recurring gift reports, another popular category, help you track all aspects of recurring gift and pledge or donation promises, including payments, write-offs, and cash flow. You can narrow the scope of a report to include a specific group of constituents, such as inactive constituents or those with a specific constituent code.

Profiles, Lists, & Directories

Profiles, Lists, & Directories is one of the few categories where the name doesn't tell you exactly what's going on. Essentially, Profiles, Lists, & Directories are summaries of selected information from records in your database. These reports can be really helpful in presenting information about your constituents to your board members or solicitors, or in compiling lists or directories containing address and phone number information for your constituents.

Using Profiles, Lists, & Directories is an excellent way to maintain a hard copy of this information from your database. When you create a profile, list, or directory, you select the type of information to include in the report and assign headings for each block of information.

Prospect Research Reports

Available if you have the optional module *Prospect Research*, Prospect Research reports help you analyze the giving potential of donors. These reports track proposals made to potential donors and actions taken after a proposal has been made. A proposal is a formal plan detailing how your organization intends to gain funds from a prospective donor, how much financial support you expect, and where the money will be used.

With these reports, you can calculate the total worth of a prospect. You can summarize information about a proposal, including when you expect an answer and the amount you anticipate to receive from the prospect. These reports are especially helpful for tracking donations with special requirements that must be met before the donor will give your organization money. For example, a scholarship donor may require applicants to be interviewed, write an essay, or attend a seminar before awarding the scholarship.

Tribute Reports

Available if you have the optional module *Honor/Memorial Tracking*, Tribute reports help you track donations made in honor, memory, or celebration of a constituent. You can print lists of contributors, produce a directory of honor/memorials, provide a gift report detailing all donations made toward a tribute, or summarize the overall picture of your tributes. An honor/memorial is a constituent who is being honored, memorialized, or celebrated by gifts donated to your organization.

Volunteer Reports

Available if you have the optional module *Volunteer Management*, Volunteer reports help you track all aspects of your volunteer program. You can define the hours a volunteer is available to work, establish assignments, identify awards, keep online time sheets, and log a volunteer's qualifications. These reports can help you maximize the efficiency of your program by matching assignment needs with volunteers having the right skills, availability, and experience. In addition, you can track past and current volunteer hours and set award levels.
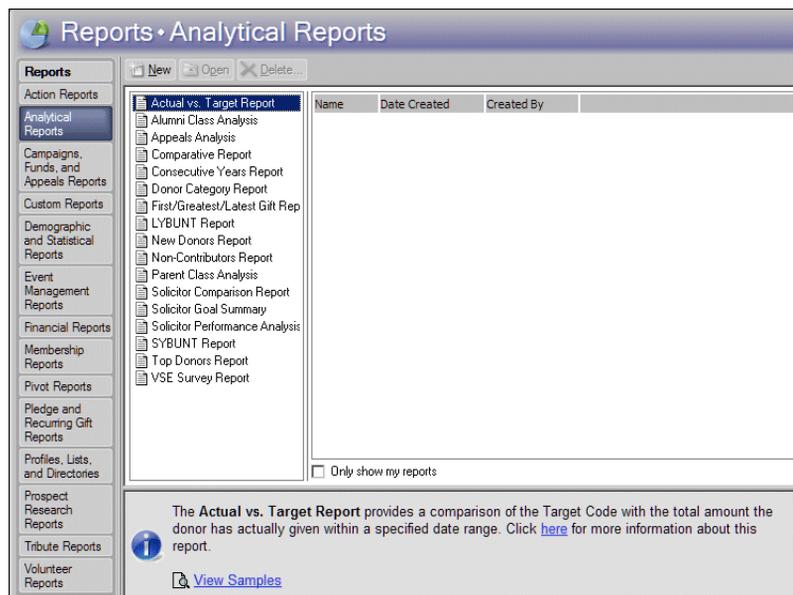
Selecting a Report

Okay, you narrowed down your selection to the correct category, now you need to choose the actual type of report you want to create. In most cases, the name is probably enough to go on, but occasionally (especially with categories such as Financial or Analytical reports) you need a little more information to help you select the report you want to create. Fortunately, the friendly folks who created *The Raiser's Edge* saw this situation coming and decided to add a blurb about each report right there on the report category page.

Say you're on the Analytical Reports page and you don't know your LYBUNT from your SYBUNT. Just select a report name and a brief description of that report appears at the bottom of the page. By using this feature, you find out that the LYBUNT (Last Year But Unfortunately Not This) Report "locates individuals who donated last year, but not during the specified date range"; and the SYBUNT (Some Year But Unfortunately Not This) Report "locates individuals who donated at some time, but not during the specified date range."

▶ Select a category and type for a new report

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

2. Select a category of report. The page for that report category appears listing all reports in that category on the left.

3. Select a report. A brief description appears at the bottom of the screen.

4. With a report selected, click **New** on the action bar. The report tabs appear so you can set general, filter, format, and other options for the new report.

Creating a Report

You've selected a category of reports and even a type of report within the category that you want to create. Two big steps without a doubt, but now it's time to really get to work. You need to define general settings for the report, as well as the filtering criteria that will result in only the records you want appearing on your report and the formatting that will determine how the report looks. You establish these and other settings on the report tabs.

Keeping Tabs on Your Information - Report Tabs

The report tabs contain all the features you use to create a report. For most reports, you can select which records to include in the report, the addresses that appear with the records, whether only records containing or not containing certain attributes should be included, and how the report will look. I say for "most" reports because tabs vary according to the specific report you create. Some reports have more tabs than others and some include information that others do not. For example, while many reports contain individual or organization constituent names, Demographic & Statistical reports contain only numerical information, so constituent names do not appear in them.

Here are some basic tabs that appear on almost every report. Keep in mind that this is just an overview to familiarize you with some of the basics of reporting. In these descriptions, we discuss some of the main features on a tab, but if you want to see detailed information about all the checkboxes, fields, buttons and other doohickeys on these tabs, as well as information about other tabs that appear only on certain reports, check out the *Reports Guide* or the help file in *The Raiser's Edge*.

General Tab

The General tab is where you decide things like which records to include on the report. Remember, as with all the tabs in *Reports*, the options on the General tab can vary depending on the report you are running. For example, on most reports, the General tab contains an **Include** button. The **Include** button is an important first step in defining the information you want to show in a report. When you click **Include**, you can select **All Records**, **Selected Records**, or **One Record**.

All Records is a little misleading. Judging by its name, you may think that if you select this option for say, a Constituent Giving History (a Financial Report), the report will automatically include all the constituents in your database. While it's true that when you select **All Records**, every record in the database can *potentially* be included in the report, you'll probably select options on the other tabs that will filter out some of these records (we'll get to filtering a little later). For example, if you have 1000 records in the database and select **All Records**, *The Raiser's Edge* looks at all 1000 records to see if any match the filtering selections on other tabs and with other options you select for the report.

When you choose **Selected Records**, the Open Query screen appears so you can include records from a query you already created, or you can create a new query.
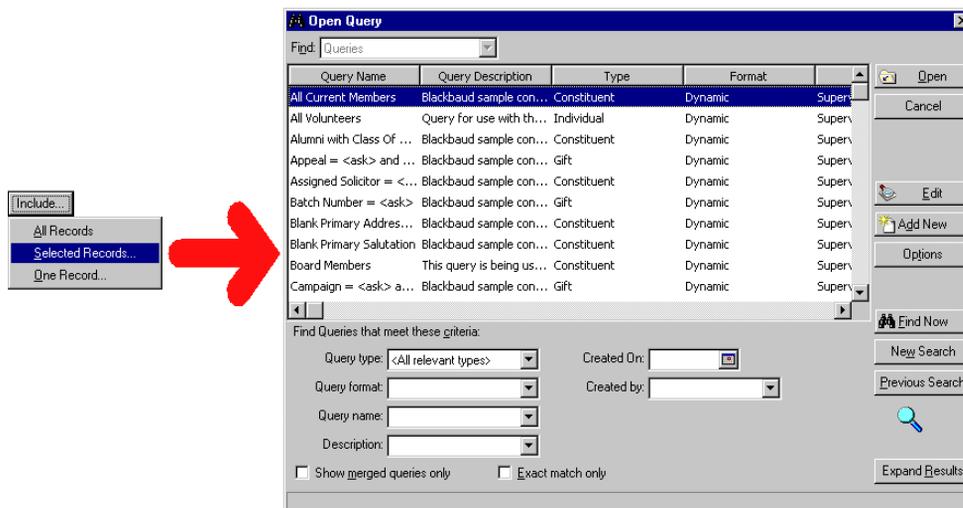

In this case, *The Raiser's Edge* looks only at records included in the query when it searches for records that meet the filtering requirements you'll set later. For example, in the Query chapter of this book, we created a query based on constituents who gave $100 or more last month. For a report, you may want a subset of only those constituents to appear, maybe the ones that live in a certain ZIP Code. Click **Selected Records** to make this happen.

On the Open Query screen, select the name of the query you created to show those constituents who gave $100 or more last month. Now *The Raiser's Edge* looks only at the records in this query when filtering records for the report. (You'd set the ZIP Code part on the Filters tab.) Using a query to narrow the records searched for possible inclusion in your report not only makes your report more precise, it saves time when you generate the report because *The Raiser's Edge* doesn't have to look at all records to filter out the ones you don't want to include. It starts with a subset of records you defined in your query and only has to look at those to determine which ones make the filtering cut. It's all about filtering out what you've got to get what you want!

Filters Tab

The Filters tab is a biggie. Use this tab to include records in a report based on criteria you select. Filters, along with a query if you selected one on the General tab, determine which records appear in your report and which are filtered out. For example, say you want to run a Constituent Giving History (a Financial Report) and include constituents with a constituent code of Alumnus. You need to filter the constituent codes included in the report by Alumnus. By doing so, only constituent records with a constituent code of Alumnus appear on the report. Constituents with other constituent codes, such as Board Member or Major Donor, do not appear on the report.
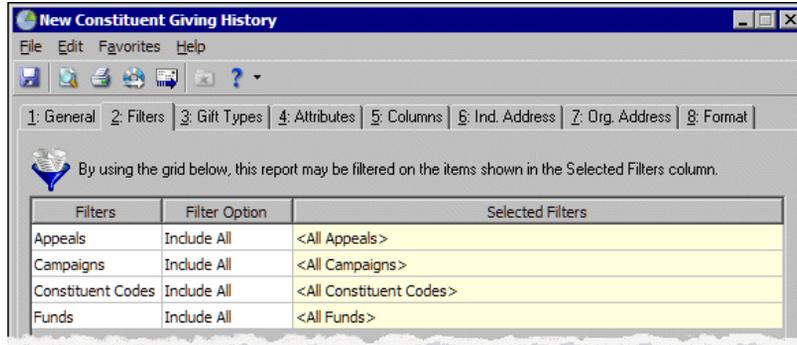
For each filter listed in the **Filters** column, you must specify whether to include all or selected records. If you don't want to filter records from the report using criteria listed in the **Filters** column, select All in the **Include** column. For example, for a report to list all gifts a donor gave, regardless of the campaign they gave them to, select All in the **Include** column for Campaigns. When you select All, <All Campaigns> appears in the **Selected Filters** column. To filter records using specific criteria, choose Selected in the **Include** column and enter filter criteria in the **Selected Filters** column.

Be Careful!

Don't "over filter" or you may end up with a blank report. For example, if you use a query that contains all your Board Members, you don't need to filter on the Board Member constituent code on the Filters tab too. That's what we call "double filtering" - an easy mistake to make.

Gift Types Tab

On the Gift Types tab, select the types of gifts you want to include in the report. Highlight a gift type in the **Gift Types** box and click the right arrow to move it to the **Include these Gift Types** box.
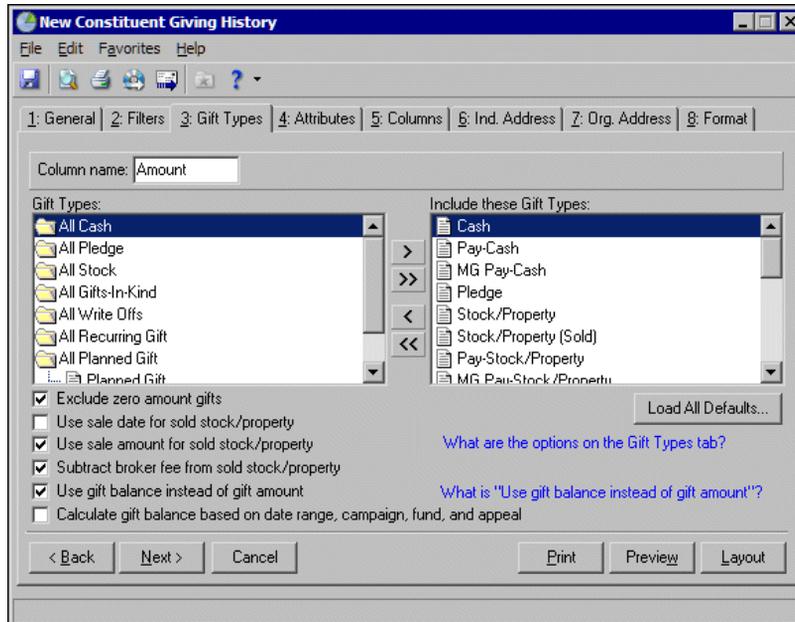
Click **Load All Defaults** to move the default gift types to the **Include these Gift Types** box. Like most everything else, gift types vary depending on the report you are running.

For more information about getting exactly the gifts you need to appear on reports, see "Troubleshooting Gifts in Reports" on page 162.

Graph Tab

Some reports can be printed as a graph. These reports have the Graph tab. On this tab, you can select to view the report results as either a bar graph or a pie graph. You can print only the report, only the graph, or both the report and the graph.
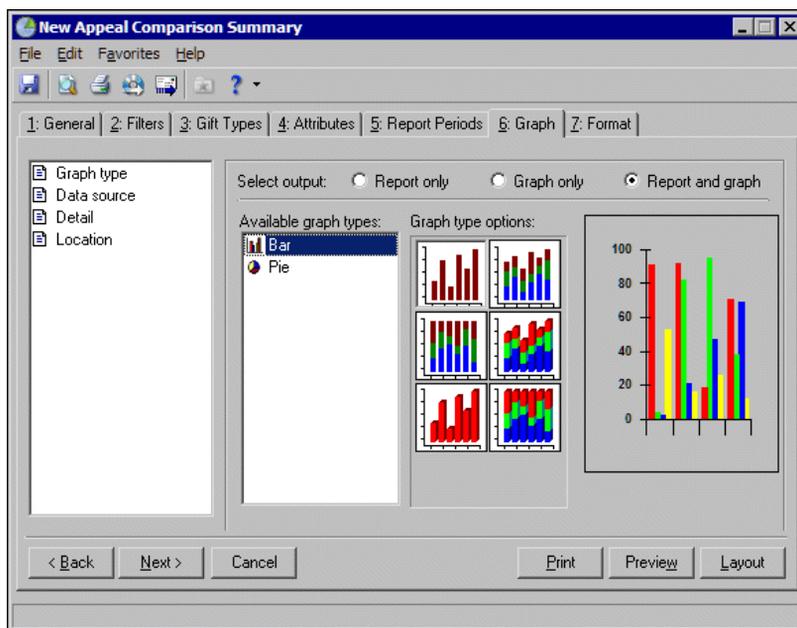
Graph selections become available only when you mark **Graph only** or **Report and Graph** under **Select output**. A sample of how the graph will appear on the report, based on your selections on this tab, appears on the right side of the screen.

Attributes Tab

As you may remember from the Records chapter of this book, you can add bits of specialized information called attributes to your records. Based on these bits of information entered on the Attributes tab of a record, you can include records in a report or exclude records from a report. For example, you may need a report showing gifts for which you have sent reminders. Under **Include Records with these Attributes**, you can filter the report to show only those gifts with an attribute category of Reminder Sent and a description of Yes entered on the Attributes tab of the gift record.

When you add this filter under **Include Records with these Attributes**, only gifts with this attribute entered on the Attributes tab of the gift record are included in the report. Similarly, under **Exclude Records with these Attributes**, you can filter the report to show only those gifts that do not have a specific attribute category and description.

By using attributes, you can accurately target the gifts that have had reminders sent. The Attributes tab is the same for all reports.

Ind. Address Tab

Chances are you'll want to include an address with each constituent in many of your reports. Use the Ind. Address tab to do just that for your individual constituents. The next section shows how the Org. Address tab includes addresses for organization constituents. *The Raiser's Edge* selects an address for each individual constituent using four steps. It is important that you be careful about what you select in each of the four steps so *The Raiser's Edge* can choose the best address for each constituent.

The Ind. Address tab is similar for all reports. The addresses of each individual constituent included in the report are processed using the four steps on this tab. When *The Raiser's Edge* chooses an address for a constituent, it begins with the first constituent in the list. To find an address for the constituent, the program compares addresses entered on the Addresses tab of the constituent record with the information you enter in the four steps on the Ind. Address tab

of the report. If *The Raiser's Edge* can't find a valid address based on your selections in step 1, it moves to step 2. If it can't find an address meeting the requirements you set on step 2, it moves to step 3 and down the line. After *The Raiser's Edge* finds a valid address for the first constituent in the report, it uses steps 1 through 4 to find a valid address for the next constituent.

Step 1 determines whether you want to consider seasonal addresses (Maybe a constituent spends summers at a vacation home and likes to receive mail there from June – August.). Step 2 determines which address types *The Raiser's Edge* considers if it can't find a valid seasonal address, or you decided not to consider seasonal addresses in Step 1. Use Step 3 to specify any attributes you want to consider for addresses. You can select an attribute category and description that must be present on an address for it to be considered for the report. For example, if you want to include addresses with the attribute category of NCOA Confirmed? and a description of Yes, you can do that in Step 3.

Step 4 is your last chance — your safety net. Use it to select the address type *The Raiser's Edge* should use if it can't find an address type meeting any of the criteria you set in Steps 1 through 3. On this tab, you can tell *The Raiser's Edge* to print the individual's name with no address, remove the record from printing on the report entirely, or select a specific address type to print when no other valid address is found for a constituent.

Org. Address Tab

Just as you use the Ind. Address tab to select addresses that print with individual constituents on your reports, use the Org. Address tab to select the address types for each organization. *The Raiser's Edge* selects an address for each constituent using four steps and considers contact types, address attributes, and specific address types. When *The Raiser's Edge* is unable to find a valid address for a constituent, it uses an alternate address. As with individuals, it is important that you be careful about what you select in each of the four steps so *The Raiser's Edge* can choose the best address for each constituent.

The Org. Address tab is similar for all reports that have the tab. The addresses of each organization constituent in the report are processed using these four steps. When *The Raiser's Edge* chooses an address for an organization, it begins with the first organization in the list. To find an address for the organization, the program compares its addresses with the information you enter in steps 1 through 4. After the program finds a valid address for the first organization, it uses Steps 1 through 4 to find a valid address for the next organization.

Unlike with individuals, in Step 1 for organization addresses you have to first decide whether you want to print the address of the actual organization or the address of your contacts for that organization. The options available in Steps 2 through 4 depend on your selection here.

Artist at Work - Formatting the Report

So you've carefully selected all the criteria for the records to appear on your report. Now that you've determined what information will be *in* the report, you need to determine how that information will *look* in the report. This is where the Format tab comes in. *The Raiser's Edge* provides a wide array of formatting options that give you the ability to create a sharp, professional looking report.

Your settings on the Format tab determine the appearance of the report. You can create headings, page footers, and report footers. If the report includes names, you can select the formats for individuals and organizations included in the report. If the report displays monetary amounts, you can select ways for displaying those amounts. For some reports you can choose to double-space and print in landscape or portrait orientation. And if you want the report to look really snazzy, all reports give you the opportunity to select colors.
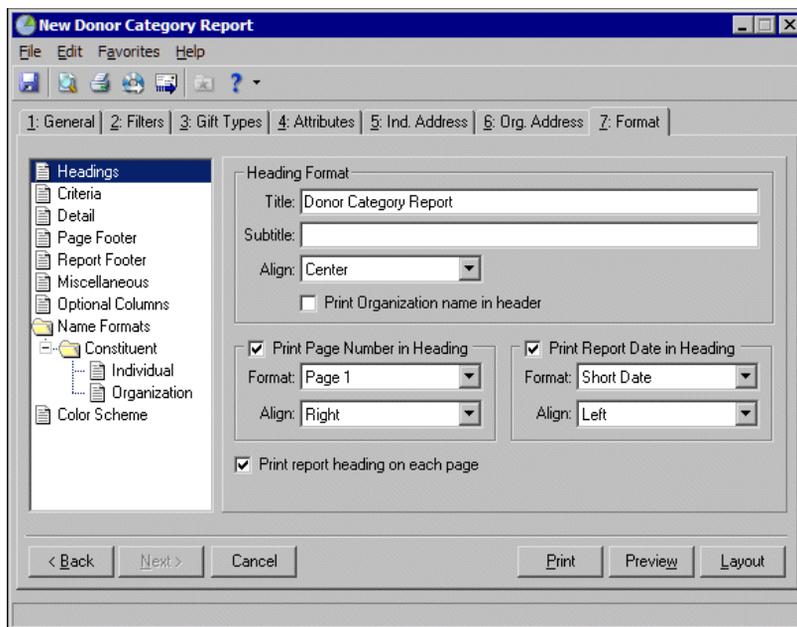
By using the formatting options, you can control many aspects of how your report looks.

Previewing and Running Reports

So you have set all the parameters for your new report; now you have one thing left to do — run it! Before you run the report, you may want to preview it so you can see what the finished product looks like before printing it.

Did You Know?

The Report tabs contain a **Preview** button and a **Layout** button. At first glance, these may seem to do the same thing. However, if you are in a hurry, don't use **Preview** to check your formatting. The **Layout** button simply brings up a preview of the report that does not contain the full data. You can use it to check your formatting selections. The **Preview** button, on the other hand, actually *runs* the report before displaying it in the preview pane. That way you can see exactly what the finished product looks like. If the report includes a lot of data, the preview can take some time to load, while the layout displays much more quickly.

▶ Preview and run a report

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

2. From the Reports page, select the category that includes the report you want to run.

3. Select the type of report you want to run, and click **New** on the action bar.

4. Set the parameters on the report tabs.

5. To preview the report, click **Preview**. To check how the report looks without actually processing the data included in the report, click **Layout**. The Report preview appears.

6. Once you are happy with how your report looks in the preview, click **Print** to print it.

Troubleshooting Gifts in Reports

Sometimes, establishing exactly the gifts you want to appear on reports can be tough. When running reports in *The Raiser's Edge*, you may find that some gifts are not being included, or you may compare one report to another and find that the amounts differ. Here are some steps you can take if you encounter these problems.

First and foremost, verify that the gift exists on the correct constituent record. Then, review each gift that should be included on the report (or a sampling if there are too many to review individually) to verify that the gifts were entered correctly. All the information entered on each individual gift must correspond with the parameters you chose when you set up the report.

Don't Forget...

Parameters are all the settings and features you establish that make up a report. By saving parameters, you can use the report over and over again.

Things to Check on Gift Records

- ✔ What are the start and end dates for your report? Do they correspond with the gift's date?

- ✔ How are you calculating soft credits and matching gifts? Is the gift entered as a hard credit, soft credit, or as a matching gift?

- ✔ Are you including only selected constituent codes? What constituent code is listed on the gift?

- ✔ Which campaigns did you include on the report? Do they correspond with the campaigns on the gift?

- ✔ Which funds did you include on the report? Do they correspond with the fund on the gift?

- ✔ Which appeals did you include on the report? Do they correspond with the appeals on the gift?

- ✔ Which gift types did you include on the report? Do they correspond with the gift type of the gift?

- ✔ Were the pledge payments made toward the respective campaigns, funds, and appeals of the original pledge?

Things to Check on the Report

✔ Are you using a query in the report?

✔ If so, is it a gift query or a constituent query? If you selected a constituent query, all gifts for the queried constituents that meet the criteria are included in the report. If you selected a gift query, only the gifts filtered in the query are included on the report.

✔ Did you mark any of the following checkboxes on the Gift Types tab?

   Exclude zero amount gifts

   Use sale amount for sold stock/property

   Subtract broker fee from sold stock/property

   Use gift balance instead of gift amount

   Calculate gift balance based on date range, campaign, fund, or appeal

✔ Did you select to **Include Anonymous Gifts** in User Options?

✔ Did you select a **Currency Filter** in User Options?

✔ Did you select Master or Installment in the **Pledge type** field on the General tab?

✔ What type of report are you processing? If you are looking for all gifts that a constituent gave and totals for each constituent, run the Constituent Giving History Report or the Annual Statement Report. If you are looking for a detailed listing of gifts received and those that are still outstanding, run the Gift Detail & Summary report.

As you troubleshoot, remember that, because each report has a specific purpose, different types of reports may possibly yield different results.

Wrapping Up

Reports are one of the more complicated areas of *The Raiser's Edge*, mainly because you have so many options to choose from. Even though reports may seem difficult to get a handle on, once you understand a few basic concepts for creating one report, you can apply those concepts to creating most reports. The process will get easier and easier.

Of course, we have provided only a broad overview of reports here. For much more detailed information about every item on every tab available for any report, see the *Reports Guide* and *Sample Reports Guide* for *The Raiser's Edge*.

CHAPTER 6

Mail, Mail, and More Mail!

> "Hope sees the invisible, feels the intangible, and achieves the impossible."
>
> - Charles Caleb Colton

In This Chapter...

▶   *Where do I begin?*
▶   *What's a parameter file?*
▶   *Which mail task to use?*
▶   *What is on each tab in Mail?*
▶   *Basic Mail procedures*
▶   *Mail merging*

If you've turned to this section, chances are you've got a mailing to do, or will sometime in the near future. After all, what else gets your point across to a large number of constituents and prospects in a pretty package quicker, easier, and cheaper than mailings? Appeals, receipts, pledge reminders, letters, labels – they're constant and never-ending! Then, you stand there, placing all the pieces in ZIP Code order in the appropriate mail trays until you're dizzy; or you rely on a mailing house to get it right. If you are grumbling under your breath that mailings are not only difficult but can be an incredibly time-consuming headache, read on.

You may think you never want to do another mailing again. If you take a deep breath (I'll wait.) and spend a few moments of your time reading this section, you'll find out just how much *Mail* in *The Raiser's Edge* automates what you need to do to prepare a mailing.

Mail in *The Raiser's Edge* provides a quick and easy way to process every type of mailing your organization needs to do. And when used in conjunction with the optional modules *Address Validation* and *PostalSaver*, you can keep track of constituents who move and don't let you know (How rude!), standardize addresses, print barcodes, and save more money than you can imagine on your mailings. (See the chapter The Raiser's Edge - Fully Loaded for more information about *PostalSaver*, *Address Validation*, and the *NCOA On-Demand* service.)

Mail in The Raiser's Edge

Let's face it, mail is to your organization as, say, what football is to many sports fans. You thrive on it. Like weekend games, it's what gets you through the week, week after week and season after season. *Mail* in *The Raiser's Edge* does not refer to the actual envelope you pull out of your mailbox; nor is it the guy in the living room yelling at the game on TV Sunday afternoons. *Mail* in *The Raiser's Edge* is where you select the information in your database to appear in mailings and where you format how the mailing pieces will look. It's your playbook where you design and execute interactions with your donors — from announcing campaign kick-offs to receipting gifts, ensuring you get a good return.

Mail tasks such as Appeal Cards, Receipts, Reminders, or Phonathon Forms are designed to print on paper with a matching layout you purchase from Blackbaud or elsewhere. For example, you can order receipts with your organization's logo from Blackbaud. When you print standard Receipts in *Mail*, the printout matches the preprinted areas on the form. If you do not want to use preprinted forms, you can design a custom form in your word processor or other application that supports mail merges. Then, you can use *Mail* to compile the constituent information you need from *The Raiser's Edge* and export this information to the application where you created the custom form.

For mail tasks such as Labels, Cards, or Envelopes, you choose a standard size, type, or brand, then load your printer and print away. You don't have to leave your database to work with these types of mail tasks. If you have the optional module *Event Management*, you can also print name tags and place cards for events such as a formal dinner meeting.

Did You Know?

You can print labels, cards, or envelopes for honor/memorial constituents and event participants if you have the optional modules *Honor/Memorial Tracking* and *Event Management*, respectively.

You can order specialized business forms from Blackbaud that line up with the way information prints from *The Raiser's Edge*. Easy! Contact the Forms Department at forms@blackbaud.com for more information about ordering Blackbaud standard forms with your organization's logo and special message.

Where Do I Begin?

The Mail page is the central location for mailings in *The Raiser's Edge*. To access the Mail page, click **Mail** on the Raiser's Edge bar.
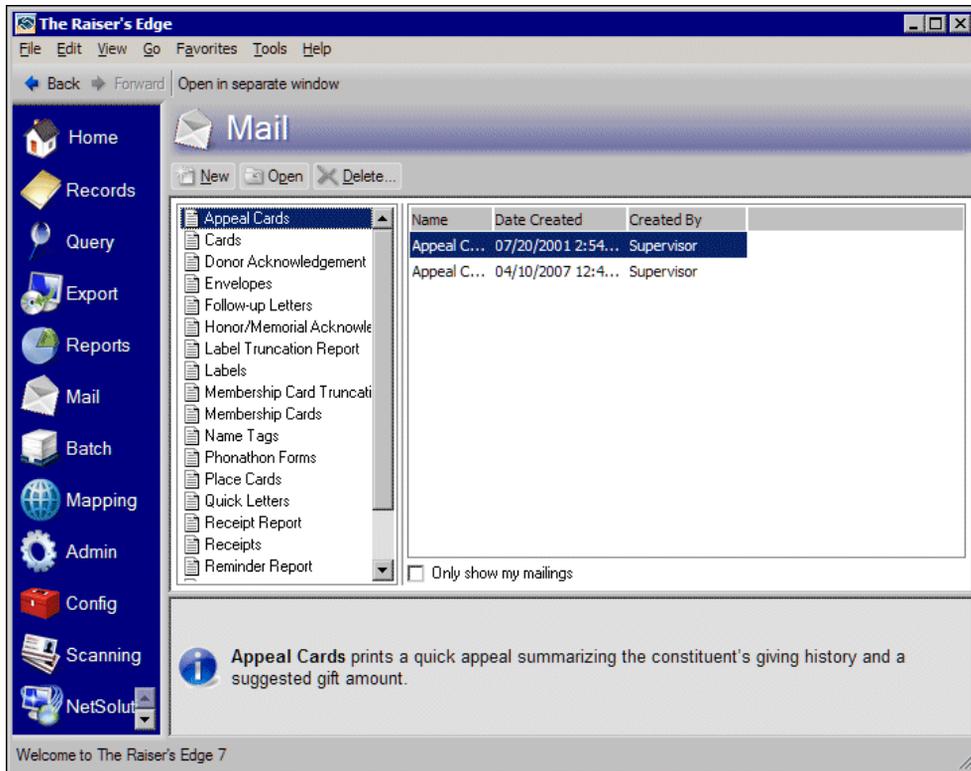
All available mail tasks are listed on the left side of the screen in alphabetical order.

What is a Parameter File?

Parameters are the guidelines you set for each mailing by each selection you make on the tabs of a mail task. You tell the program which records to include or exclude, based on these parameters. A parameter file is what you create when you establish settings for an individual mail task. You can save the settings you establish for a mail task, such as labels, to reuse some or all of them for a similar mailing in the future. This saves you time and prevents you from reproducing your work. For example, you send general thank-you letters to donors each week for the gifts you receive in that time frame. You can create a Donor Acknowledgement Letters mail task and save it as Weekly Thank-Yous. The next time you want to run these same letters for a new group of donors, open this parameter file from the list on the right of the Mail page. Change any settings you'd like and rerun this mail task. You can either save the newly modified settings over the old ones or save it as a new parameter file with a different name. Quick and easy!

The More Conspicuous, The Better

Now, this is very important. Just like in *Query*, save your parameter files with names you'll remember and that make sense. Now is not the time to be clever. When naming parameter files, make what's in there as obvious as possible. For example, you wouldn't want to name a receipts mailing for gifts donated between January and February of 2003 "Joan". What are the chances you'll remember that or anyone else will be able to find it under such an inconspicuous name? It may be better to save the parameter file as something like "Receipts Jan-Feb 2008". Ah, sometimes "to the point" sounds so much better. And though you are vitally important to the organization, don't assume you'll be there forever (that lotto ticket in your desk drawer just could be the "big one" and you may be off to Tahiti next week.) You may know that "QED27*%" is a parameter file for annual fund pledge reminders, but no one else in the office will.

Which Mail Task To Use?

We're going to explain a little about all the available mail tasks. However, don't forget the friendly folks at Blackbaud put descriptions right on the bottom of the screen. So when you click on a mail task on the left of the Mail page, just look to the bottom pane on the screen for more details about what that particular mail task does.

Don't Forget...

You can press **F1** on your keyboard from any screen in *The Raiser's Edge* and the help file topic for that screen will appear. Pretty neat, huh? Try it. You may like it.

Appeal Cards

Appeal cards just may be your saving grace. They are a quick and easy solicitation and get right to the point, asking constituents for a specific donation amount. You can calculate this amount for each person included in the mailing by increasing a previous gift by a certain amount you specify. So, say Donna Donor gave $150 last year. You can bump that number up by $20 or 10% or whatever you want and ask for that amount. Oh, so subtle! But sometimes donors need a little nudge.

You can even specify a different requested donation amount for previous donors and new donors, separately. You can also print on the appeal card information about past gifts donated by the constituent.

You can print standard or custom appeal cards.

Did You Know?

You can also choose to automatically update the **No. solicited** field on the General tab of an appeal record to include the constituents included in an appeal cards mailing in *Mail*.

If you select the **Gift barcode** field on the Fields to Include tab for an appeal card mailing, when you receive a gift from the donor as a result of the appeal, you can simply scan the barcode while entering gift information in *Batch*. Constituent, gift type, campaign, fund, and appeal information automatically fills in. This way, you ensure accuracy and cut down on data reentry. For more information about entering a gift from an appeal card through *Batch*, see the *Batch Guide*.

Cards

A game of cards, anyone? Think of all the different possible types of card games. That's how many possibilities you have to use the Cards mail task to help you raise more money. Print information about constituents, honor/memorials, relationships, or participants on index or Rolodex cards.

You may want to print a Rolodex card for all major donors in your database with their preferred phone number and address, birth date, a contact name for organizations, and attributes of Business Hours and Interests. *The Raiser's Edge* is compatible with many card types. However, if you want to design your own card instead, you can still use the Cards mail task to gather *The Raiser's Edge* information and export it to create custom cards.

Donor Acknowledgement Letters

Your mother taught you to send a thank-you note after you receive a gift, right? That's what the Donor Acknowledgement Letters mail task is for. Let a donor know you received their gift, thank them for it, and they'll be more likely to give again.

Select and export specific gift amount, fund, and address information to create personalized thank-you letters for your donors. In a word processing program that supports mail merges, write a letter thanking donors for their interest and gifts. In this letter, insert merge fields, such as gift amount, gift date, and fund to personalize the letter for each constituent. Let them know you appreciate them. For example, you can write, "Thank you for your gift of [merge field], donated to the [merge field] fund on [merge field]". Using the Donor Acknowledgement Letters mail task, you can export the corresponding fields in *The Raiser's Edge* to create a personalized thank-you letter for each donor.

If you are using Microsoft *Word* to perform a mail merge, see *The Raiser's Edge & Microsoft Office Integration Guide* for a procedure using the Word Merge Wizard, which makes it even easier for you to create letters from *The Raiser's Edge*.

Envelopes

Envelopes can be printed for constituent, honor/memorial, relationship, and participant records. You can include optional information, such as the constituent ID and an address barcode (if you have the optional module *PostalSaver*). *The Raiser's Edge* is compatible with many standard envelope sizes. However, if the envelope size you want to use is not available, you can export the information gathered by the Envelopes mail task to create custom envelopes.

Follow-Up Letters

You said you'd do it, you set an action, now it's time to follow up! The Follow-Up Letters mail task can be used to select and export information about actions entered on the Actions tab of a constituent record. For example, you may want to create follow-up letters for every constituent you dined with in the past week, thanking them for meeting with you and for their generous pledges. These are great for your solicitors to use!

Honor/Memorial Acknowledgement Letters

Honor/Memorial Acknowledgement Letters are like Donor Acknowledgement letters, but specifically for honor/memorial gifts. This mail task is available when you have the optional module *Honor/Memorial Tracking*. You can use this mail task to select and export honor/memorial information to create letters that let acknowledgees know of a tribute.

Did You Know?

A tribute acknowledgee is the family member, friend, associate, or honoree to notify when a gift is donated on behalf of an honor/memorial constituent

Label Truncation Report

"Don't cut off the --"! Mislabeled mail looks sloppy and unprofessional. You want your constituents to read the mail you send them, so don't cut off their names or addresses from the mailing labels. Truncation happens when the text on your mailing pieces is cut off either vertically or horizontally. The Label Truncation Report is meant to save you time and money. Basically, you use the report as a checklist to make sure everything is correct, legible, fits on the label, and is good to go, before you print and send out hundreds and thousands of labels.

This report lists the constituent's name, along with the information that does not fit on the label as you currently have it designed. This way, you can see where changes need to be made and make the changes before you print the label in the Labels mail task. Won't you look good to the boss when your mailings always go out labeled perfectly? No one else needs to know this little secret of yours that helps you do that.

Labels

It's not very PC to pin a label on people. But don't be afraid to pin a label on things that come from your office's PC. The Labels mail task can be used to print information about constituents, honor/memorials, relationships, or participants on a label type you select. For example, if you are printing receipts, you may also want to print a label for every constituent who receives a receipt for when you mail them out.

Membership Card Truncation Report

The Membership Card Truncation Report is just like the Label Truncation Report. It is available if you have the optional module *Membership Management*. You can use this report to test the vertical and horizontal formatting of your membership cards before you print them.

The membership card truncation report lists the member's name with the information that does not fit on the membership card as you currently have it designed, so you can make changes before printing in Membership Cards.

Membership Cards

Everyone wants in. Like the secret knock to get into the clubhouse, everyone wants to know it. Donors will pay for the privilege of a membership card if it gets them into your museum or event. Membership cards are available when you have the optional module *Membership Management*. You can send membership cards as a tangible token of the membership. To track member attendance at membership activities, you can add a barcode to the membership card.

You can create a standardized 12-field membership card:
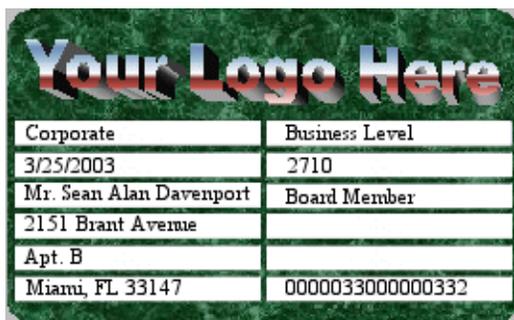
Or you can print a preprinted membership card:
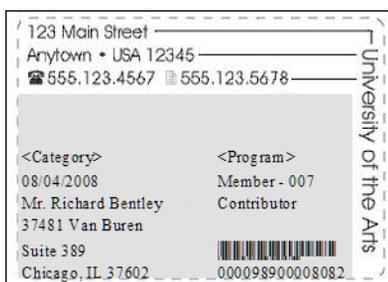
Name Tags

"Hello, my name is ___". Make your constituents feel welcome, special, and make it easier on yourself to remember their names. A friendly constituent is a happy donor. A happy donor likes to donate to your cause. However, if you call her by the wrong name, she may not be so inclined to give. You can print Name Tags when you have the optional module *Event Management*. This way, you can greet constituents appropriately at your next event before you hit them up for a donation. So, if you are hosting a class reunion, for example, you can print name tags for all attendees.

Blackbaud Standard Business Forms

You can order forms from Blackbaud that align with information printed from *The Raiser's Edge* mail tasks. They can be customized with your colors, logo, personal messages, and any special inks or print styles.

You can order the following forms from Blackbaud specialized for your needs:

❑ Receipts for gifts

❑ Envelopes

❑ Reminders for pledges & recurring gifts

❑ Renewal Notices for memberships

❑ Appeal Cards

❑ Phonathon Forms

❑ Membership Cards (with or without lamination)

For more information or to order:

✔ See samples on the website at http://forms.blackbaud.com.

✔ Send an e-mail message to forms@blackbaud.com

✔ Call 1-866-4-BB-Forms (1-866-422-3676)

Phonathon Forms

Would you like to phone a friend? When asking for help or donations, especially over the phone, it helps to have facts in front of you. With the Phonathon Forms mail task, you can print out a detailed personal and gift history for each constituent you will call during a phonathon. These forms are also a great time-saver. Standard phonathon forms contain a perforated section you can send to constituents as a pledge reminder. You can also print a barcode on this section. Then, when you receive it back in the mail from the donor along with his gift, you can simply scan the barcode in *Batch* and constituent and appeal information automatically fills in. This saves you data entry time and reduces errors.

Place Cards

The Place Cards mail task is available when you have the optional module *Event Management*. With this mail task, you can print place cards for every person attending your event. If you are hosting a formal dinner, you can print place cards to assign the seating arrangements for your guests.

Quick Letters

A Quick Letter is an easy way for you to quickly create a basic letter to send to your constituents. The fields in this mail task, which unlike other mail tasks are preselected and not editable, include basic mailing information only, such as name and address lines. For example, you may want to create a quick letter simply informing all constituents of your office's new address.

Receipt Report

The receipt report lists all gifts that have receipt numbers within a range you specify. This report can display the name of each constituent receiving a receipt, the receipt number, the gift type, the gift date and amount, the fund to which the gift was attributed, and any information entered in the **Reference** field on the gift record.

This is great to use around tax season so you have a report of the receipts you sent all year. You can use the Receipt Report mail task to determine the constituents who received a receipt for their gifts. It may also be helpful for your accounting department. You can also use the receipt report as a checklist to verify you sent out all the receipts you printed. You can customize the report by adding formatting, such as subtitles, footers, and your favorite color.

Receipts

You can print receipts for every gift entered in *The Raiser's Edge*. You may want to print receipts to confirm your organization received the gift or to help constituents track their donations for tax purposes. When designing the receipt, you can choose whether to print the total gift amount or the tax-deductible portion of the gift.

Don't Forget...

For a gift to receive a receipt, you must select Not Receipted in the **Receipt** field on the Gift tab of a gift record.

For a gift to appear in the receipt report, a receipt number must be entered in the **Receipt no.** field on the Gift tab of a gift record and must be marked as Receipted.

Reminders

Reminders can be sent to constituents who have an overdue or outstanding balance on a pledge or to remind them of their recurring gift. You can send a reminder for each pledge installment (or recurring gift payment) or a single reminder for an entire pledge.

Don't Forget...

For a constituent to receive a reminder, you must mark the **Send reminders** checkbox on the Gift tab of a gift record.

Reminder Report

The reminder report lists all constituents who received pledge or recurring gift reminders, based on your selections in the Reminders mail task. Think of the Reminder Report as a snapshot of all reminders given out during a certain time period. You can print this report only after printing reminders using the Reminders mail task. This report can display the name of each constituent receiving a reminder, the pledge date, the fund to which the pledge was attributed, the pledge amount, and any information entered in the **Reference** field on the pledge or recurring gift record.

Renewal Notices

Renewal Notices take the guesswork out of when memberships lapse. And sending them certainly beats chasing your members down on the street and tackling them for a renewal donation. If you have the optional module *Membership Management*, you get this handy mail task.

You can print renewal notices for memberships that have lapsed or will soon lapse. Renewal notices can be printed in several sizes and include the current membership category and the date the membership expires. You can set up the time frame for each membership category in *Configuration*.

Volunteer Follow-Up Letters

The Volunteer Follow-up Letters mail task is available when you have the optional module *Volunteer Management*. This is an easy and efficient way to let your volunteers know what they need to know about a job assignment like location, date, and start time. Select and export information from job records in your database and mail to assigned or interested volunteers. It's a great way to get and keep volunteers by remaining organized, and ensure your events and programs go off without a hitch.

▶ *Define user options*

Before you start working in *Mail*, you can set a few user options to make your life easier. Like all user options, these settings will affect workstations only when you are logged in with your password. The personal settings you establish won't affect what another user sees when they are logged in with another password.

This procedure explains how to set up user options specific to *Mail*. For more information about user options, see the Basics chapter.

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

2. Select the Mail tab.

3. From the list on the left, select **All mailings**.

4. To automatically save a parameter file containing the settings you select when setting up a mail task, mark **Automatically save mail parameters on close**. If you mark this checkbox, the program asks if you want to save a parameter file each time you create or make changes to and then close a mail task.

> ### Time-Saver
>
> The **Automatically save mail parameters on close** checkbox is a huge time-saver. Half the battle with *Mail* is going through all the tabs and setting up your mailing how you want it. You probably run the same or similar mailings over and over. Unless you've got nothing else to do with your time, you don't have to re-create settings each time you run a mailing. Save your settings and reuse or adjust saved parameters to create new mailings in less than half the time, with hardly any effort. You only have to think hard once. The rest is filling in. Doesn't that sound nice?

5. To automatically maximize the window that appears when you preview a report, mark **Automatically maximize preview window**.

6. In the **Font** and **Font size** fields, select the font and size you want to use for your mailings. In the **Font** field, you can select any font installed on your workstation.

> ### Be Careful!
>
> Use caution when selecting the font size. Not all font sizes may work well with the mail task you are using. For example, a selected font may be too large to fit on a specific label size.

7. From the list on the left of the Mail User Options screen, select **Gift preferences**.

8. To include anonymous gifts during mail processing, mark **Include anonymous gifts**.

9. When printing a mailing containing gifts donated in a particular currency, you can filter the gifts that appear in the mailing by entering a currency in the **Currency filter** field. For example, if you want gifts donated only using Japanese yen to appear in the mailing, select "Yen-Japan" in the **Currency filter** field. If you do not want to filter the mailing by currency, leave this field blank.

> ### Don't Forget...
>
> For a currency type to be available in the **Currency filter** field, you must set up the currency using the **International** link in *Configuration*.

10. To print gift amounts using the currency in which the gift was donated, mark **Print amounts using donor's currency**.

11. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

12. If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

▶ *Open a Mail Task*

1. On the Raiser's Edge bar, click **Mail**. The Mail page appears. A list appears on the left of all available mail tasks.

2. To create a new mailing, highlight the mail task you want to use, such as Receipts, and click **New** on the action bar above the list of mail tasks. A new parameter file opens to the General tab.

Tip

To create a new parameter file, you can also double-click the mail task name is the list on the left of the Mail page, such as Receipts.

3. To open an existing mailing, see Opening a Saved Parameter File below.

▶ *Open a Saved Parameter File*

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

2. To open an existing mailing, highlight the saved parameter file you want to use in the list on the right and click **Open** on the action bar.

Don't Forget...

You can also double-click the existing parameter file.

Sifting Through the Tabs in Mail

Mail can seem overwhelming, but once you know how to use it, it can be a very helpful tool for fundraising. You can target the appropriate constituents with the appropriate mailings to help increase donations. It may be helpful to think of *Mail* as a colander, like the one in your kitchen you use to drain spaghetti.

You keep only the records you want to target and get more out of your mailings. Although there is a Filters tab in *Mail*, all tabs in *Mail* actually work as a kind of filter to strain your database of records you don't want to mail to.

When you begin thinking about doing a mailing, all records in your database are possible mailing recipients. The selections you make on each tab in *Mail* are like pouring the records in your database into a colander. *Mail* sifts out the records you want to keep for the mailing.

On each tab, the selections you make narrow down your target group to mail to. This process helps you determine which records you catch in the colander that is your mailing. The other records that don't meet the requirements you define on each tab in the mail task filter through the holes and drain back into the pot, or your database. You just need to plan ahead and think about who you want to receive this mailing and for what reasons.

You Can Always Get What You Want

Each mail task is different, but the same tabs appear throughout *Mail*. Not all tabs defined below are available for all mail tasks. See the *Mail Guide* that accompanies *The Raiser's Edge* for more detailed information about making selections in a particular mail task. The tabs available throughout *Mail* are as follows:

General Tab

The major purpose of the General tab is to help you select a base group of records to be processed by the mail task. The fields and options available vary between mail tasks, but you should get the general idea about the General tab here.

To define the records to include in the mailing, click **Include**. You can select **All Records**, **Selected Records**, or **One Record**. Even if you select to include all records here, a mail piece does not necessarily print for each constituent record. You can later use other tabs, such as the Attributes tab, to further limit the records included in the mailing. Use the options behind the **Include** button to define the base group of records to which you want to mail.

In the **Type** field, for certain mail tasks, you need to select whether to use a Preprinted form already laid out by the program or create a Custom data file of your own design. If you choose Custom data file, you need to create a custom form in a program that supports mail merges and then export information from *The Raiser's Edge*.

In the **Create for** field of some mail tasks, select the record type for which you want to print mail pieces. You can select **Constituents**, **Relationships**, **Honor/Memorials** (if you have the optional module *Honor/Memorial Tracking*), or **Participants** (if you have the optional module *Event Management*).

Under **Include Gifts with these Dates** on certain mail tasks, specify a date range to select gifts to include in the mailing. In the **Date to use** field, select whether you want to use the Gift date or the General Ledger (GL) post date to determine whether a gift should be included in the specified date range. In the **Date** field, select a date to use, such as Today, Yesterday, or <Specific Range>. When you select <Specific Range> in the **Date** field, the **Start** and **End** fields appear so you can enter a date range to use.

Soft Credit Gifts To

When you add a new gift, you can use soft credits to credit multiple constituents for the same gift without duplicating a gift in your database. When creating certain mailings, you need to specify under **Soft Credit Gifts To** how the program should credit the donor and the soft credit recipients in the giving summary. You can credit **Donor**, **Soft credit recipients**, or **Both**.

Include Gifts with these Amounts

Under **Include Gifts with these Amounts** in certain mail tasks, specify a monetary range to select the gifts that should be included. For example, you may want to print special receipts for major donors. In the **Start amount** field, enter the smallest gift amount for which you want to print a receipt. In the **End amount** field, enter the largest gift amount for which you want to print a receipt.

Include these Constituents

The **Include these Constituents** frame has three checkboxes you can use to include or exclude constituents based on their status. Mark **Inactive constituents** to include constituents with **Constituent is inactive** on the Bio 1 or Org 1 tab of their constituent records marked. Mark **Deceased constituents** to include individuals with **Deceased?** on the Bio 1 tab of their constituent records marked. When you mark **Constituents with no valid address**, constituents with **Constituent has no valid addresses** marked on the Bio 1 or Org 1 tab of their constituent records are included in the mailing. To exclude these constituents form the mailing, unmark these checkboxes on the General tab of the mail task you're using.

Credit Matching Gifts To

When a constituent donates a gift, a matching gift company can also donate a matching gift. When creating a mailing, you need to specify under **Credit Matching Gifts To** how the program should credit the donor and the matching gift company in the giving summary. You can credit:

Donor - The donor, or employee of the matching gift company, receives credit for the matching gift.

MG Company - The matching gift company receives credit for the matching gift.

Both - Both the donor and the matching gift company receive full credit for the matching gift.

Create output query

An output query is a query of all records included in a mailing. For example, when printing letters for a group of constituents, you can create an output query containing the names of all constituents included in the mailing. Later, you can use this query to print address labels or envelopes for the same group of records. When you mark **Create output query**, select what type of output query to create, such as constituent or gift.

Good To Know...

If you sort the mailing using the Postal tab or **Sort** on the Format tab, records appear in the output query using that same order.

Head of Household Processing

In your database, you may have separate constituent records for two constituents who are married or life partners. Under **Head of Household Processing** on some mail tasks, you can decide whether to print a mail piece for one spouse or both. You can select **Mail only to constituents marked 'Head of Household'**, **Mail to first constituent found**, or **Mail to both constituents separately**.

When you select **Mail only to constituents marked 'Head of Household'**, a mail piece prints for the constituent with **This individual is the "Head of Household"** marked on the **Spouse** button of the constituent record. If you select **Mail to the first constituent found**, a mail piece prints for the first constituent found. For example, you are creating cards for a query of constituents. Cards are processed for these constituents using the order the records appear in the query. If Jan Smith appears in the query before her husband John, a card prints for Jan and a card does not print for John. When you select **Mail to both spouses separately**, a card prints for both constituents.

Good To Know...

If you choose to print a mail piece for only one spouse, you can use addressees or salutations to include the other spouse. For more information about addressees and salutations, see the chapter Records: Constituents + Gifts = Fundraising.

Fields To Include Tab

The Fields to Include tab is appropriately named because it's where you select the fields from *The Raiser's Edge* to include in your mailing. In other words, what information are you trying to get out of your database and put into your mailing? The **Available Fields** box contains all fields you can include for that particular mail task. The available fields change, depending on whether you select Preprinted or Create custom data file in the **Type** field on the General tab.
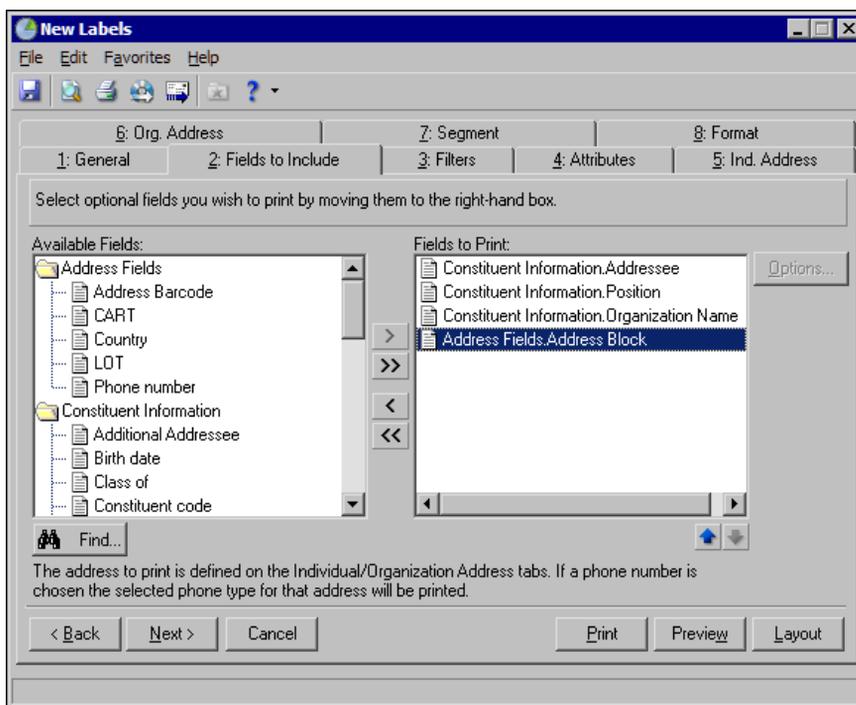
To move a field from the **Available Fields** box to the **Fields to Export** or **Fields to Print** box, select the field in the **Available Fields** box and click the single right arrow. Certain fields have options associated with them. When you move these fields to the **Fields to Expor**t box, the Field Options screen appears. After selecting the options for a field, you can change the options by selecting the field in the **Fields to Export** box and clicking **Options**.

Did You Know?

Some mail tasks have a **Fields to Print** box and some have a **Fields to Export** box. Use the up and down arrows to order the fields in the **Fields to Export** or **Fields to Print** box.

Filters Tab

Use the Filters tab to narrow down, or filter, the records selected for your mailing, based on specific criteria. The **Filters** column lists all filters available to further define the records processed. For example, when using the Cards mail task, you can filter the records by Date Last Changed or Solicit Codes. You set parameters based on this information, which comes from the constituent record, and either include or exclude these records from the mail run.

In the **Include** column, indicate whether you want to use specific criteria for a particular filter by choosing All or Selected. For example, to include gifts given only to a particular fund, choose Selected in the **Include** column for the Fund filter. In the **Selected Filters** column, choose which funds. For example, if you select All in the **Include** column for the Campaign filter, <All Campaigns> appears in the **Selected Filters** column. If you choose **Selected in the Include** column for the Constituent Codes filter, the binoculars appear in the **Selected Filters** column, so you can access the Selected Constituent Codes screen.

Selected [Filters] screen

This screen appears for any filter for which you choose Selected in the **Include** field.

From the Selected Constituent Codes screen, you can choose specific constituent codes for a gift to receive a mail piece by highlighting the description in the box on the left and clicking the single right arrow.

▶ Use the Filters tab to limit the records receiving a mailing

1. From a mail task, select the Filters tab. For more information about opening a mail task, see "Opening a Mail Task".

2. To include constituents who donated gifts to a certain fund, for example, choose Selected in the **Include** column for the Funds filter.

3. Click the binoculars in the **Selected Filters** column for the Funds filter.

4. From the Selected Funds screen, select a fund in the list on the left and click the single right arrow to move it to the **Include these Funds** box. For example, you can select "2008 Annual Fund".

5. Click **OK** to return to the Filters tab. The fund you selected appears in the **Selected Filters** column for the Funds filter. Now only gift records with that fund entered in the **Fund** field are included in the mailing.

6. Do the same for all filters you want to use for your mailing.

Attributes Tab

Do you keep adding attributes to the Attributes tab of records, tracking personal details about your donors. So now what? You can use them here! On the Attributes tab, narrow down the records to receive a mailing, according to attributes you've entered on the Attributes tab of a constituent, relationship, honor/memorial, participant, gift, or action record. By using attributes, you can accurately target constituents most interested in the mail you're sending or even update attributes on records included in a mailing.

Did You Know?

The **Honor/Memorial** and **Participants** options are available only if you have the optional module *Honor/Memorial Tracking* or *Event Management*, respectively.

The Attributes tab is made up of two frames: the **Include or Exclude Records With these Attributes** frame at the top and the **Add, Update, or Delete these Attributes for each Record** frame at the bottom. To use either frame, check the checkbox first to enable it.

In the top grid, select whether to include or exclude records with matching attributes. In the bottom grid, select whether to add, update, or delete attributes on records included in the mailing. Then, you need to specify the record type you want checked for the attribute or updated and enter the category and description of the attribute used to filter the records. If you enable the grid by marking the checkbox, you must enter at least one attribute in the grid.

Include or Exclude Records With these Attributes

If a constituent has an attribute with a category of Responded? and a description of Yes on the Attributes tab of an action entered on the constituent record, she has already responded, so you can exclude the constituent from receiving a letter.

▶ ## Include or exclude records from a mailing using attributes

1. From a mail task, select the Attributes tab.

2. Mark **Include or Exclude Records With these Attributes**.

3. In the **Filter** column, select whether to include or exclude records from the mailing based on the attribute you enter in the row.

4. In the **Record Type** column, select the record type you want the program to search for the attribute. For example, if you want the program to look for the attribute on a constituent record, select "Constituent" in the **Record Type** column.

5. In the **Category** and **Description** columns, select the attribute by which you want to include or exclude records. For example, you can select the attribute Category "Special Mailing Types" and the Description "Do Not Mail". In other words, in this example the program searches constituent records for the attribute Category of Special Mailing Type and Description of Do Not Mail entered on the Attributes tab. The records it finds, if they meet all other specifications made on other tabs in the mail task, are included or excluded, depending on what you select in the **Filter** column.

6. Repeat steps 3 through 5 to add additional attributes to the grid. A record must meet all the criteria you specify to be included in the mailing.

Don't Forget...

Be careful not to use too many filters or you could exclude too many records from your mailing. Each filter you select narrows down your list of records to include in this mailing. If you get too specific, you may not have enough records to mail to.

Add, Update, or Delete these Attributes for each Record

When you send a mailing, you can add, update, or delete attributes on constituent, address, or action records included in the mailing. For example, under **Add, Update, or Delete these Attributes for each Record**, you can add an attribute to each record receiving a letter to note each participant's dietary preference for a dinner you are planning. You can even update Address attributes.

▶ Add, update, or delete attributes on a record included in the mailing

The program adds, updates, or deletes attributes when you print, export, or send the mailing as e-mail.

1. From a mail task, select the Attributes tab.

2. Mark **Add, Update or Delete these Attributes for each Record**.

3. In the **Action** column, select whether you want to add, update, or delete this attribute from the records included in the mailing.

4. In the **Type** column, select the record type for which you want the program to add, update, or delete the attribute. For example, if you want the program to add an attribute to a constituent record, select "Constituent" in the **Type** column.

5. In the **Category** and **Description** columns, enter the attribute you want to add, update, or delete from the records. For example, you may want to add an attribute with a Category of "Interests" and a Description of "Women's Issues".

6. In the **Date** column, enter the date you want to associate with this attribute.

7. In the **Comment** column, enter any comments you want to associate with the attribute. For example, you may want to enter "Interested in donating to causes related to women's health or business".

8. Repeat steps 3 through 7 to add additional attributes to the grid.

9. After selecting all the attributes, you must export or send the mailing as e-mail to add, update, or delete the attributes from the constituent records. For more information, see procedures for Exporting a Mailing or Sending a Mailing as E-mail.

Don't Forget...

Although there is a Filters tab in *Mail*, the selections you make on each tab in *Mail* work to filter out records you do not want to include in the mailing in order to get the best possible select group to mail to.

Gift Types Tab

On the Gift Types tab in some mail tasks, you need to select the gift types that should be included in the mailing. For example, you may want to print receipts for only stock/property gifts. The **Gift Types** box contains all available gift types. Move the selections you want for the mailing from the **Gift Types** box to the **Include these Gift Types** box. Select a gift type in the **Gift Types** box and click the single right arrow to move it to the Include these **Gift Types** box. If you do not move any gift types to the **Include these Gift Types** box, a message appears, stating you must include at least one gift type to print the mailing.
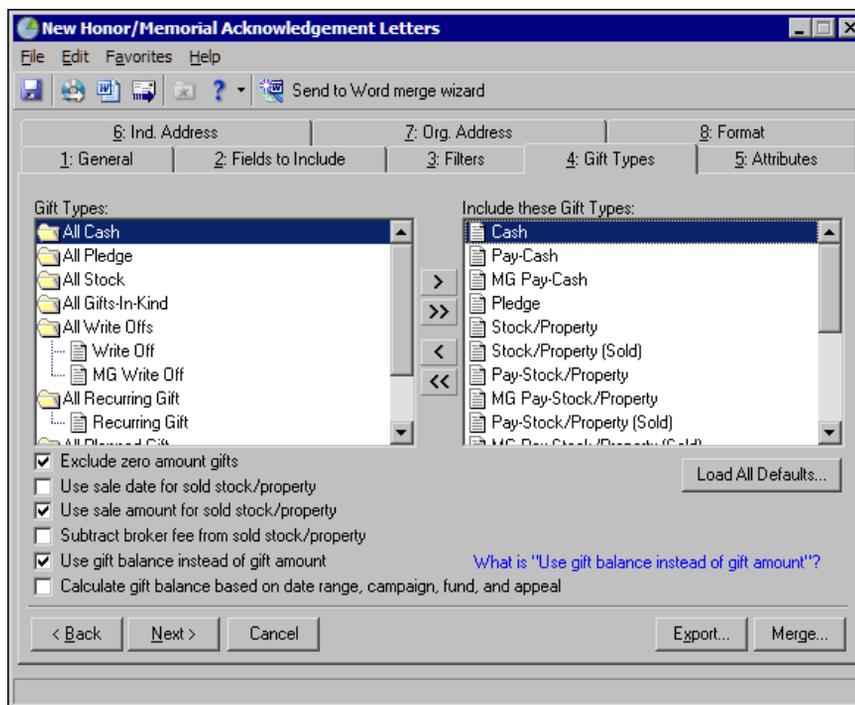
You can click **Load All Defaults** to select the default gift types in the **Include these Gift Types** box. You can mark **Exclude zero amount gifts** to exclude gifts from receiving a receipt when the gift amount is entered as or adjusted to zero.

Good To Know...

There are more checkboxes available on the Phonathon Forms, Appeal Cards, and most Letters mail tasks. See the *Mail Guide* for more specifics.

Ind. Address Tab

The Ind. Address tab in *Mail* is much like the tab of the same name in *Reports*. Use the Ind. Address Tab to select an address to use on mailings for individual constituents. The program selects an address for each constituent using four steps and considers seasonal addresses, address attributes, and specific address types.

Addresses go through each step and if a valid one is not found using the parameters of the first step, the address goes on to the next step for consideration, and so on. When the program cannot find a valid address for a constituent, you can select an alternate address to use as the last step. It is important to indicate your preferences in each of the four steps so the program can choose the best address to use for each constituent.

Because the address used for each constituent is selected individually, different address types can be selected for constituents in the mailing list. For example, according to the information you entered on the Ind. Address tab, the Preferred Address can be selected for Larry Smith, the Business Address can be selected for Melvin Thomas, and the Summer Home address can be selected for Cindy Harris.

Step 1

In Step 1, mark **Consider addresses with seasonal dates as of** if seasonal addresses should be considered as eligible addresses for the mailing. When you mark this checkbox, you need to select a date, such as Today, Yesterday, or <Specific date>, in the corresponding field.

The program uses the date you enter to determine whether a seasonal address is valid. For example, if you mark **Consider addresses with seasonal dates as of**, select <Specific date> in the corresponding field, and enter 12/01/2003 in the **Date** field, an address with **Seasonal from** date of 04/03 and a **Seasonal to** date of 07/03 is not selected for this mailing. If the program considers seasonal addresses, it selects the first valid seasonal address found. If a valid seasonal address is not found, the program uses your selections in Step 2.

Step 2

In Step 2, specify the addresses to consider when a valid seasonal address is not found in Step 1 or if you did not consider seasonal addresses for the mailing. To select an address, select the address in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box. If you list multiple addresses in the **Addresses to use** box, you need to sort the addresses in order of their importance. To move an address within the **Addresses to use** box, highlight the address and click the up or down arrow.

For example, you can include the Preferred address and the Primary business address by selecting them in the **Addresses** box and clicking the right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to use the Preferred address. Because the program selects the address based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the beginning of the list.

Don't Forget...

The program checks only the address types listed in the **Addresses to use** box. If you want the program to check all address types during address processing, move all available address types from the **Addresses** box to the **Addresses to use** box.

Step 3

In Step 3, you can use attributes to choose the address type to print by clicking **Address Attributes**. When you click **Address Attributes**, the Address Attributes to Consider screen appears.

You can select an attribute category and description that must be present on an address for it to be considered for the mailing. For example, if you want to include addresses with the attribute **Category** of Special Mailing Info and a **Description** of Newsletter, enter the information on this screen. For more information about entering address attributes, see the Records chapter. After entering the necessary address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Did You Know?

An ellipsis appears at the end of the display if the attributes you selected do not fit in the area provided. You can hold your cursor over the attribute to view a tool tip displaying the entire attribute.

Step 4

In Step 4, select the address type the program should use if it cannot find an address type meeting your selections in Steps 1 through 3. You can print the individual's name with no address, remove the record from printing in the mailing, or select a specific address to print. If you select a specific address to print, the **Address to print** field appears so you can select the address type to print on the mailing when no other valid address is found for the constituent.

Org. Address Tab

The Org. Address tab is for – yep, you guessed it – organization constituents. On the Org. Address tab, you need to select the address type for each organization constituent in the mailing. You can choose to print addresses entered on the constituent records of the organization's contacts or on the organization's constituent record. The program selects an address for each

constituent using four steps and considers address attributes and specific address types. When the program is unable to find a valid address for a constituent, you can select an alternate address. It is important to indicate your preferences in each of the four steps so the program can choose the best address for each constituent.

Because the address used for each constituent is selected individually, different address types can be selected for constituents in the mailing list. For example, according to the information you entered on the Org. Address tab, the Preferred Address can be used for Baldwin Entertainment, the Business Address can be used for City Insurance Company, and the Mailing Address can be used for Outside Investments.

Mailing to an Organization's Contacts

When choosing addresses for organizations, the selections available in Steps 2 through 3 depend on whether you want to print an address entered on a contact's constituent record or an address entered on the organization's constituent record. If you want to print a contact's address, the Org. Address tab appears as shown.

Step 1

In Step 1, select **Mail to contacts** to print a contact's address. You know how people sometimes say the first step is the most important step? That applies here. The selection you make in Step 1 affects the rest of the steps on this tab.

Step 2 – Contact Information

In Step 2, select the contact types you want to include by clicking **Contact Information**. When you click this button, the Contacts to Receive Mail screen appears.

You can include all contact types or choose specific contact types. To select specific contact types, mark **Include Selected Contact Types Only**. If you do not mark this checkbox, all contact types are considered for the mailing. To select a specific contact type to use, select the contact type in the **Contact types** box and click the right arrow to move it to the **Contact types to include** box.

If you list multiple contact types in the **Contact types to include** box, you need to sort the contact types in the order of their importance. To move a contact type within the **Contact types to include** box, select the contact type and click the up or down arrows. For example, some of the organizations may not have a matching gift coordinator. You can include the contact types Matching Gift and Corporate Donations in the mailing by selecting them in the **Contact types** box and clicking the right arrow to move them to the **Contact types to include** box. If an organization has both contact types on its record, you want to use the address for the matching gift. Because the program selects the contact type based on its position in the **Contact types to include** box, use the arrows to move Matching Gift to the beginning of the list.

When more than one contact should receive a mailing, mark **Print one for each contact found.** If you do not mark this checkbox, the first contact that meets the address criteria is selected for the mailing.

Did You Know?

To ensure proper receipting and membership card usage, the **Print one for each contact found** checkbox is not available for the Receipts or Membership Cards mail task.

In the **If a contact also receives this mailing as an individual** field, you can select to mail only to the individual address, mail only to the contact address, or mail to both addresses separately. This field appears only in the following mail tasks: Labels, Envelopes, Label Truncation Reports, Quick Letters, and Appeal Cards, and Phonathon Forms.

After you select all the contact types you want to use, click **OK.** A display appears to the right of the **Contact Types to Include** button on the Org. Address tab, listing the contact types you selected.

Step 2 – Contact Address Attributes

In Step 2, you can also include or exclude contact addresses based on address attributes entered on the contact's address attributes screen by clicking **Contact Address Attributes.** When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.

The address attribute category and description you select must be present on the Address Attributes tab of a contact's relationship record to be considered for the mailing. For example, if you want to include addresses with the address attribute Category of Preferred Contact and a Description of Yes, enter the information on this screen. For more information about entering attributes, see the Records section.

Did You Know?

- Contact Address Attributes entered on the Attributes tab of the Address screen of the contact's relationship record are considered for filters, instead of regular attributes entered on the Attributes/Notes tab of the relationship record. Access the Address Attributes tab by clicking the **More** button on the General 1 tab of the contact's relationship record.

- An ellipsis appears at the end of the display if the attributes you selected do not fit in the area provided. You can hold your cursor over the attribute to view a tool tip displaying the entire attribute.

- If a contact's address does not qualify for the mailing because of the address attribute filters, the contact is removed from the mailing.

When you finish entering contact address attributes, click **OK**. A display appears to the right of the **Contact Address Attributes** button on the Org. Address tab and lists the address attributes you selected. When you do not specify any address attributes, the label displays <No contact address attributes specified>

Step 3

In Step 3, you need to select what the program should do if it cannot find a contact address meeting your selections in Steps 1 and 2. You can print the organization's name with no address, remove the record from printing in the mailing, or select a specific address to print. If you select a specific address to print, the **Address to print** field appears so you can select the address type to print from the mailing.

Please note that when mailing to contacts, the alphabetical sort order you select on the Format tab of the mail task is based on the Organization name, even though the contact name is used as the addressee. For more information about sorting, see the Format Tab: Sort section.

Mailing Only to the Organization's Address

When selecting addresses for organizations, the selections available in steps 2 through 4 depend on whether you select to print an address entered on a contact's constituent record or an address entered on the organization's constituent record. If you want to print the organization's address, the Org. Address tab appears as shown.

Step 1

In Step 1, select **Mail only to the organization**. Your selection in Step 1 affects the rest of the steps on this tab (so choose wisely). If you select **Mail to contacts**, see the Ind. Address Tab section for more information.

Steps 2 – 4

Steps 2 - 4, when mailing only to the organization and not its contacts, are the same as for selecting addresses for individuals on the Ind. Address tab. See the Ind. Address tab section for specifics.

Segment Tab

The Segment tab is the easiest way for you to divide mailings into separate segments and make sure there is no overlap. The Segment tab appears in the Cards, Envelopes, Labels, and Quick Letters mail tasks. Use the Segment tab to include multiple queries in one mailing without having to worry about printing more than one piece of mail for a constituent. The Segment tab is also useful when you prepare a mailing that will be sent out in several packages.

Did You Know?

Package. You can use packages to track historic and statistical information for different facets of a single appeal. For example, your Winter Mailing Appeal may consist of a newsletter sent to minor donors, a glossy brochure sent to mid-level donors, and a full color booklet sent to major donors. By tracking separate packages, you can analyze the effectiveness of each individual solicitation of an appeal.

Funneling Records on the Segment Tab

The Segment tab can seem overwhelming, but once you know how to use it, it can be a very helpful tool. The Segment tab contains a grid you use to list all the queries you want to include. Think of it as a funnel. Each level, going down on the grid, filters out the overlap of records contained in each query. You just need to plan ahead and think about which groups, or queries, may overlap with other queries. This helps you decide the order to place the queries on the Segment tab. The order in which you place the queries is very important. The program removes duplicate constituents from the mailing based on the order you list the queries in the grid.
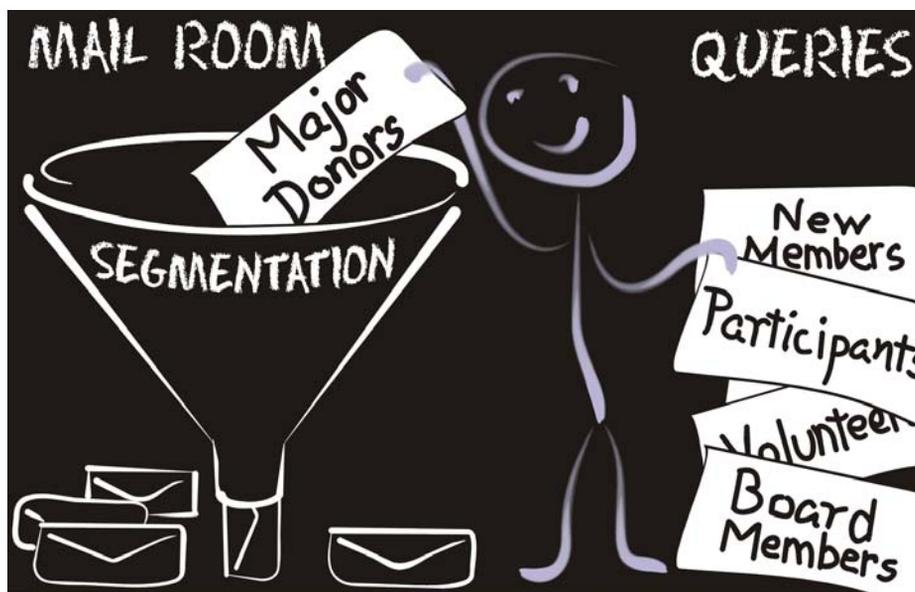
For example, when preparing to print letters concerning parking for a party, you created three queries—Board Members, Major Donors, and Volunteers. You want them all to park in different areas; the board members getting the closest spots, then the Major Donors, then Volunteers. All constituents in the Board Members query are also included in the Major Donors query, but you do not want your board members to receive two pieces of mail. Because you want to separate the letters for board members from major donors, list the

Board Members query in the first row of the grid. This is the most important group. If a record appears in both queries, you want them to receive the Board Member letter. In the second row of the grid, list the Major Donors query. Some Major Donors may also be Volunteers, but you want them to receive the Major Donor letter. In the third row, list the Volunteers query. Any record in this query that was not already funneled into one of the previous groups gets the Volunteer letter.
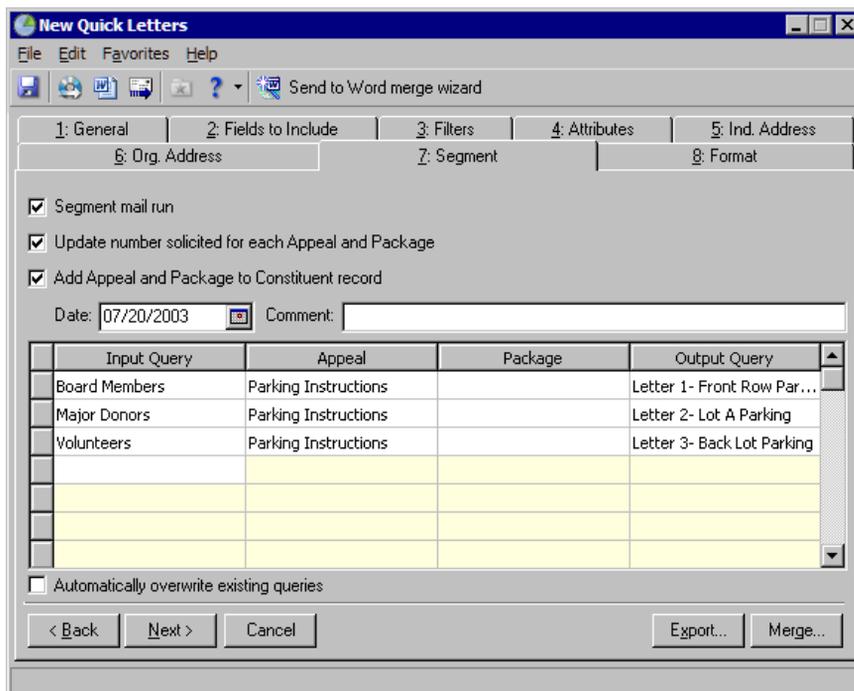
Funneling Results = Output Queries

You may be wondering, "How do I know in which group a constituent appears?" The answer is Output Queries. Think of each row as a group. Once the records from each query are funneled, the end result of each group is different from the initial queries you used. The first row contains the Board Members group, the second row contains the Major Donors group (minus the

Board Members that were funneled out), and the third row contains the Volunteers group (minus the Major Donors and Board Members that were funneled out). You can create an output query for the end result of each particular group, so you know which records received what letter. Enter a name for the output query in the final column in the grid on the Segment tab.

Additional Items on the Segment Tab

Marking **Segment mail run** enables the rest of the Segment tab. Marking **Update number solicited for each appeal** adds the number of constituents in the mailing to the number solicited on the Appeal record. Marking **Add Appeal to Constituent record** adds the appeal to the constituent's record, using the date and comment entered. The appeal is added to the record only once, no matter how many times it appears in the grid. Mark **Automatically overwrite existing queries** if you want the output queries you create to automatically overwrite existing queries with the same name.

▶ Segment a Mailing

1. When you segment a mail run, you must include all records in the mailing. To include all records, click **Include** on the General tab of the mail task. When the submenu appears, select **All Records**.

> ### Did You Know?
>
> If you choose **Selected Records** and include a query on the General tab of the mail task, a record must be present in both the query entered on the General tab and the query entered on the Segment tab to receive mail.

2. Select the Segment tab.

3. Mark **Update number solicited for each Appeal** if you want to update the number of constituents solicited for an appeal to include the constituents from this mailing. When you mark this checkbox, only those who have a constituent record are included in this number. For example, if you create cards for participants of an event and mark this checkbox, only participants who are also constituents are included in the number solicited.

4. To add a particular appeal to the Appeals tab of constituent records included in this mailing, mark **Add appeal to Constituent record**.

5. In the **Date** field, enter the date you sent or prepared the mailing. You can also add any appeal notes in the **Comment** field. Comments appear in the **Comments** column on the Appeals tab of the constituent record.

6. In the first row of the **Input Query** column, click the binoculars to search for the first query you want to use, such as the Board Members query. This is a dynamic query of all board members for your organization.

Don't Forget...

Input queries must be constituent queries.

---

7. In the first row of the **Appeal** column, enter the name of the appeal.

8. In the first row of the **Output Query** column, enter a name for the output query of the constituents included in this segment of the mailing. For example, you can name it "Parking Section 1". This is a new static query.

9. In the second row of the **Input Query** column, click the binoculars to search for the second query you want to use, such as the Major Donors query. This is a dynamic query of all major donors for your organization. Some records in this query may overlap with the Board Members query. However, if a record is included in the first segment of the mailing, it does not receive the second segment of the mailing.

10. In the second row of the **Appeal** column, enter the appeal.

11. In the second row of the **Output Query** column, enter a name for the group receiving the second segment of the mailing. For example, you can enter "Parking Section 2". This is a new static query.

12. In the third row of the **Input Query** column, click the binoculars to search for the third query you want to use, such as the Volunteer query. This is a dynamic query of all volunteers for your organization. If a record in this query also appears in the first or second query, it is included in that segment of the mailing. If not, the person receives this segment of the mailing.

13. In the third row of the **Appeal** column, enter the appeal.

14. In the third row of the **Output Query** column, enter a name for the query of constituents included in this segment of the mailing. For example, you can enter "Parking Section 3". This is a new static query.

15. To print this mailing, see the section Printing a Mailing. To save the settings entered in this mail task, you need to create a parameter file. For more information, see the procedure for Saving a Parameter File.

PostalSaver Tab

If you have the optional module *PostalSaver* and you include the **Address barcode** and **Endorsement line** fields on the Fields to Include tab for your mailing, you can use the PostalSaver tab to sort your mailing and qualify for discounts offered by the US Postal Service. For more information, see the chapter The Raiser's Edge - Fully Loaded of this guide or see the *Mail Guide*.
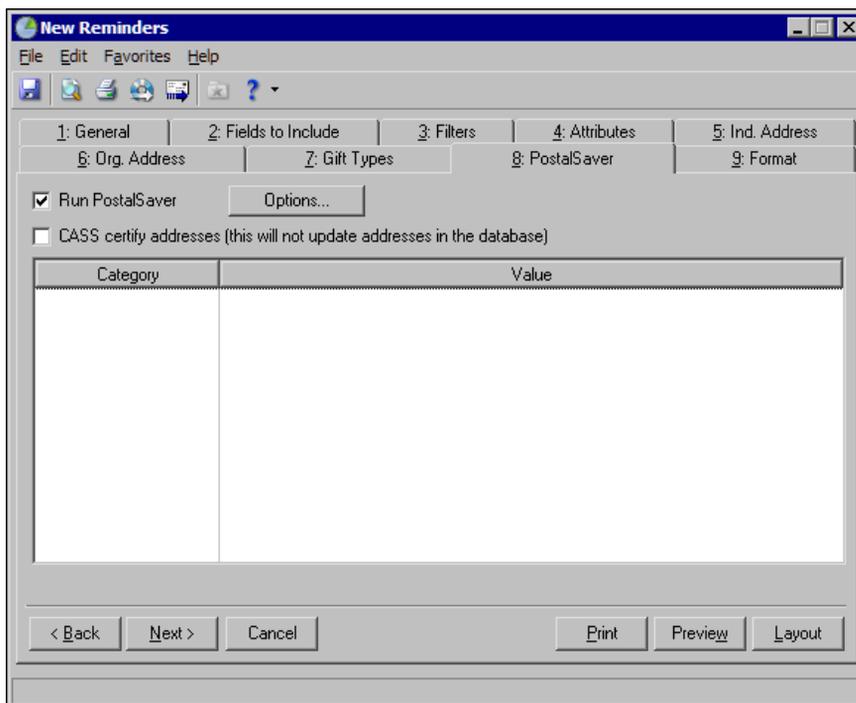
Format Tab: Miscellaneous

The **Miscellaneous** checkboxes and field determine the appearance of monetary amounts in the mailing. For example, you can indicate whether to display decimals and a currency character. When you select **Miscellaneous**, a Sample Display appears so you can view a sample of the formats you choose.

To print a monetary symbol such as a $ sign before monetary values, mark **Show currency character**. To include commas in monetary values, mark **Show 1000's separator**. To display all monetary values with two decimal places, mark **Show decimals**. To display the percent symbol with percentages, mark **Show percent sign**.

When a monetary amount equals zero, you can choose to omit the number instead of printing a zero by marking **Show blanks instead of zero amounts**. In the **Negative amount format** field, select whether negative amounts are displayed with the negative symbol, such as -100.00, or in parentheses, such as (100.00). As you select the format for monetary values, you can view the Sample Display to determine whether the amounts are formatted correctly.

Format Tab: Output Options

Your settings on the Format tab for **Output options** determine how the information from *The Raiser's Edge* prints on the mail pieces. For example, you can decide whether addresses should appear without punctuation or in all capital letters. Select **Output options** from the list on the left side of the Format tab to access these options.

You can mark **Omit punctuation from mailing** to remove all commas, periods, and semicolons from the address. This includes any punctuation in the constituent's name and address block. You can mark **Print address in ALL CAPS** to print the entire address block, including the constituent's name, in capital letters. To be eligible for certain postal discounts, the post office requires addresses to appear in capital letters without punctuation. Mailings with standardized addresses, which include no punctuation and capitalization throughout the address, are eligible for discounts offered by the US Postal Service.

You can specify the vertical position of the text on the label by marking **Skip [ ] lines before printing the first line**. For example, your organization may have seasonal labels with a preprinted holiday message at the top of the label. By marking this checkbox, you can adjust the position of the text on the label so it does not print over the preprinted message. When you mark this checkbox, you also need to enter the number of lines to skip. You can skip between one and four lines. This checkbox is disabled if you include the **Address barcode** or **Endorsement line** fields for the mailing on the Fields to Include tab.

You can specify the horizontal position of the text on a label by marking **Include [ ] spaces before each line**. For example, your organization may have seasonal labels with a snowflake graphic on the left side of the label. You can adjust the position of the text on the label so it does not print over the graphic by marking this checkbox. When you mark this checkbox, you need to enter the number of spaces you want to skip. You can skip between 1 and 99 spaces.

When you mark **Include total number of labels**, the total number of labels processed prints on the label immediately following the last label printed by the mail task.

When you print labels for participants or relationships, the program prints the address present on the participant record or the Relationships tab of the constituent record. When an address is not present on a participant record or Relationships tab of a constituent record, you must specify in the **For records who do not have an address** field whether to print the participant's or relationship's name with no address or to omit the participant or relationship without an address from the mailing.

Did You Know?

To print labels for participants or relationships, select either Participants or Relationships in the **Create for** field on the General tab. Participants is available only if you have the optional module *Event Management*.

Format Tab: Sort

You can use **Sort** on the Format tab to specify in what order you want to print the mail pieces. For example, you can choose to sort the mailing alphabetically by constituent name.

Did You Know?

Sort is available in the list on the Format tab only if you do not sort the mailing by running postal discount on the PostalSaver tab. The PostalSaver tab is available only if you have the optional module *Postal Discounts*.

Select **Do not sort mailing** if you want the mailing to print in the order processed by the program. For example, if you clicked **Include** on the General tab to print labels for a specific query, you can select **Do not sort mailing** to print the labels in the order the records are processed by the program.

To specify the order in which the mailing prints, select **Sort by the following fields**. When you select this option, the **Available Fields** and **Sort Fields** boxes are enabled so you can select the fields by which you want to sort the labels.

Did You Know?

The **Available Fields** box contains all fields available to sort the mailing. The fields that appear in the **Available Fields** box depend on selections you make on previous tabs.

The **Sort Fields** box contains all fields by which you want to sort labels. To sort a mailing, click the single right arrow to move the fields you want to sort from the **Available Fields** box to the **Sort Fields** box.

For example, to sort the mailing alphabetically by constituent name, highlight **Alphabetical** in the **Available Fields** box and click the single right arrow to move **Alphabetical** to the **Sort Fields** box.

You can select whether the program should sort in ascending order (A to Z) or descending order (Z to A). To change the sort order to ascending, select the field name in the **Sort Fields** box and click **Asc** or **Desc**. The sort order displays to the right of the field name.

> ### Did You Know?
>
> You can sort a mailing using more than one field. For example, you can move **ZIP Code** and **Alphabetical** to the **Sort Fields** box. The order the fields are listed in the **Sort Fields** box affects the way the program sorts the labels. If **ZIP Code** is listed first, all the items sort by ZIP Code, then sort alphabetically by constituent name within each ZIP Code. To change the order of the fields in the **Sort Fields** box, highlight the field you want to move and click the up or down arrow as necessary to move the field to the appropriate location.

Format Tab: Report Options

On Receipt Report and Reminder Report mail tasks, additional options appear on the Format tab. You can decide how you want the report **Headings**, **Criteria**, **Detail**, **Page Footer**, **Report Footer** and other **Miscellaneous** information to look. You can also select **Name Formats**. For more detailed information about designing a report, see the *Mail Guide*, accessible from the **Help** menu in *The Raiser's Edge*.

Selecting Addressee/Salutations

When you send mailings to constituents, you may want to address them different ways, depending on how well you know them, what type of donor they are, what type of mailing it is, or even where the name appears on the mail piece. For example, in a letter you can choose to address John Smith as Mr. John Smith, III at the top of the letter where his name appears with the address and say Dear John, for the salutation.

You select any variation of **Addressee**, **Salutation**, **Additional Addressee**, or **Additional Salutation** fields to include in a mailing on the Fields to Include tab. When you do, the Customization Options screen for that particular field option appears so you can select the format of the addressee or salutation for each constituent's name included in the mailing.

When you select **Individual** or **Contact** in the **Constituent** folder under **Name Formats** in the treeview on the left, the **Addressee To Use** frame appears on the right side of the screen and contains three options: **From individual**, **From Configuration**, and **Use individual name**.

▶ *Print a mailing*

For mail tasks that are not letters, you can print the mailing directly from *Mail*. Once you have established all parameters on each tab of the mail task, simply click the **Print** button (printer icon) on the toolbar. The mailing prints to your default printer.

▶ *Export a mailing*

For certain mail tasks, you may want to export *Raiser's Edge* information to a spreadsheet or perform a mail merge if you've created custom forms in a word processing program.

1. Once you establish all parameters on all tabs of the mail task, click **Export** on the toolbar, or select **File**, **Export** from the menu bar. The Export screen appears.
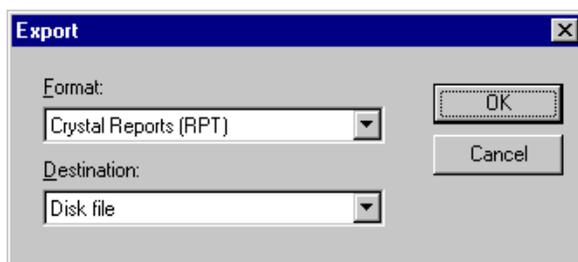
2. In the **Format** field, select how you want the program to arrange the data in the export file. For descriptions of the available export formats, see the procedure for Exporting a Letter.

3. In the **Destination** field, select where you want the program to put the export file.

4. Click **OK**. The Choose Export File screen appears.

5. In the **Save in** field, select the directory where you want to save the export file.

6. In the **File name** field, enter a name for the export file.

7. Click **Save**. The export is complete. You can open the export file in an application compatible with the export file type you selected.

▶ *Export a letter*

For letters mail tasks, you must export *Raiser's Edge* information into the letter you typed in a word processing program. If you use Microsoft *Word* as your word processing program, you can click **Send to Word merge wizard**. For all other word processing programs, follow these steps.

1. To export a Letters mail task, simply click **Export** on the bottom right corner of the screen, once you've established all your parameters on all tabs of the mail task.

2. If you marked **Create output query** on the General tab, the Save Static Query screen appears. Fill in the **Query name** and **Description** fields. The **Query format** field defaults to "Static" and disables the field because output queries must be static. For more information about static queries, see the Query chapter. To allow other users to use or change this query, mark **Other users may execute this query** and **Other users may modify this query**.

3. Click **Save**. The Export screen appears.

4. In the **Export file type** field, select the format for the export file. For more information about Export file types, see The Raiser's Edge: In & Out chapter in this book.

5. In the **Export file name** field, enter a file name and location where you want the export file to be stored. You can click the ellipsis to browse to a location.

6. If you want the first row of the export file to contain the *Raiser's Edge* field names, mark **Include header.**

7. To print a control report containing information about the export file, mark **Create control report.** When you mark this checkbox, select whether you want to print or preview the control report. We recommend you print a control report so you can maintain a record of the information in the export file.

8. To begin creating the export file, click **Export Now.** When the export is complete, you can open the export file in another application to merge the information with your mailing.

9. Save and close the mail task. For more information, see the procedure Saving a Mailing.

▶ *Save a mailing*

1. On the toolbar of a mail task, click **Save.** The Save Mailing As screen appears.

2. In the **Mailing name** field, enter a title for the parameter file.

3. In the **Description** field, enter information describing the use of the mailing.

▶ ## *Restart a mail run*

When you print a mailing, you may encounter problems, such as your printer jamming. And, no matter how many times you kick it, it just won't work right. These problems can cause your mail task to stop printing. Instead of rerunning the entire mailing, you can start printing at the point when the paper jammed.

1. From a mail task, select all tabs and fill in the parameters you need for the mailing.

2. Click **Print**. The program processes the mailing.

3. After the program processes the mailing, a message appears, asking if the mailing printed correctly.

4. To rerun the mailing, click **No**. The Restart Run screen appears

   You can click **Find** to search for a specific record in the mailing.

5. In the **Records Included in Run** grid, select the record where the printing should begin.

6. Click **OK** to restart printing the mailing.

Did You Know?

To delete a record from the mail run, select the row and press **DELETE** on your keyboard.

The Two-Lane Highway: Mail Merge

When you write a letter or create custom forms, you need to perform a mail merge to get *Raiser's Edge* information into the document you created in a word processing program.

Mail tasks help you select information from your database to print in your letter or custom form. After setting up the mail task, you export the information to the application where you wrote the letter with merge fields, so you can create personalized letters for each constituent. Afterall, everyone likes to see their names in print and that personal touch may mean the difference between a nice donation and a very generous one.

The Word Merge Wizard in *The Raiser's Edge* walks you through the steps of creating letters in Microsoft *Word*. Think carefully about the letter you want to write before you start extracting data from *The Raiser's Edge*. Here is a list of steps to follow:

❑ **Write your letter or create your custom form**. Use a word processing program, such as Microsoft *Word*, that supports mail merges. Insert merge fields in this document where *Raiser's Edge* information will go to personalize each letter or form.

❑ **Think about who should be included in the mailing**. Using *Query* and the tabs in *Mail*, determine the records you want to include in your data file. For more information about *Query*, see the chapter Query: The Search for Answers in this book.

❑ **What *Raiser's Edge* information do you want in each letter or custom form?** Pick the *Raiser's Edge* fields you want to include in your data file.

❑ **Merge it.** Click **Send to Word Merge Wizard** on the toolbar of the mail task you are using and follow the steps of the wizard to perform your mail merge.

For more information about performing a mail merge, see *The Raiser's Edge & Microsoft Office Integration Guide*, accessible from the **Help** menu in *The Raiser's Edge*.

The Raiser's Edge: In and Out

> "SCATTER PLENTY O'ER A SMILING LAND."
>
> - THOMAS GREY

In This Chapter...

▶ Configure This!
▶ Open for Business
▶ Whip Up a Batch
▶ Campaigns, Funds, and Appeals
▶ Importing, Not Smuggling
▶ The Art of Exporting
▶ Custom View

Now that you've learned the basics of *The Raiser's Edge*, it's time to address the more sophisticated features this program has to offer. Don't worry, "sophisticated" doesn't mean you should be afraid! It just means *The Raiser's Edge* works behind the scenes in complex ways to give you bigger and better ways of using information in your database.

You use *The Raiser's Edge* by adding information to your database, querying that database for specific information, and bringing that information out of the database in a fashionable format using exporting, mailing, and reporting functionality. In the following sections, we'll talk about configuring your defaults and settings in *Configuration*. We'll also talk about faster ways to add data using *Batch*, and the significance of campaigns, funds, and appeals. Importing and extracting files in and out of your database is also very important. You will probably find that you will do more of this than you think. We'll talk about how you can import and export information and why it's helpful.

Lastly, we'll discuss the customization options you have with *Custom View*. With *Custom View*, you can view constituent records in a way that's most beneficial to you. You may not want to see the age, religion, and marital status of every constituent in your database. So you can use the *Custom View* tool to create "views" of your records — records that fit *your* style!

Configure This!

Configuration. Say this word to yourself a hundred times and maybe then you'll get used to it. You'll also need to get used to the fact that you'll see this word referred to as Config (as it appears on the Raiser's Edge bar). While this may seem to be a clunky and very technical word, *Configuration* is a term that you'll see quite often in *The Raiser's Edge*. *Configuration* is a section of *The Raiser's Edge* where you can work with functions, defaults, and settings. Okay, kind of like user options right? They are similar, but different. While both user options and *Configuration* allow you to set options and defaults for the program, with *Configuration*, you are doing more than just specifying how you want *The Raiser's Edge* to look and feel.

One thing to keep in mind about this part of the program is that depending on your security settings, you may not have access to *Configuration*, meaning you won't even see Config on the Raiser's Edge bar. No need to worry though. It's still there and working as hard as ever! For this section, we mainly just want to make you aware of what *Configuration* is and its role in **The Raiser's Edge**.

To access *Configuration*, from the Raiser's Edge bar, select **Config**. The Configuration page appears.
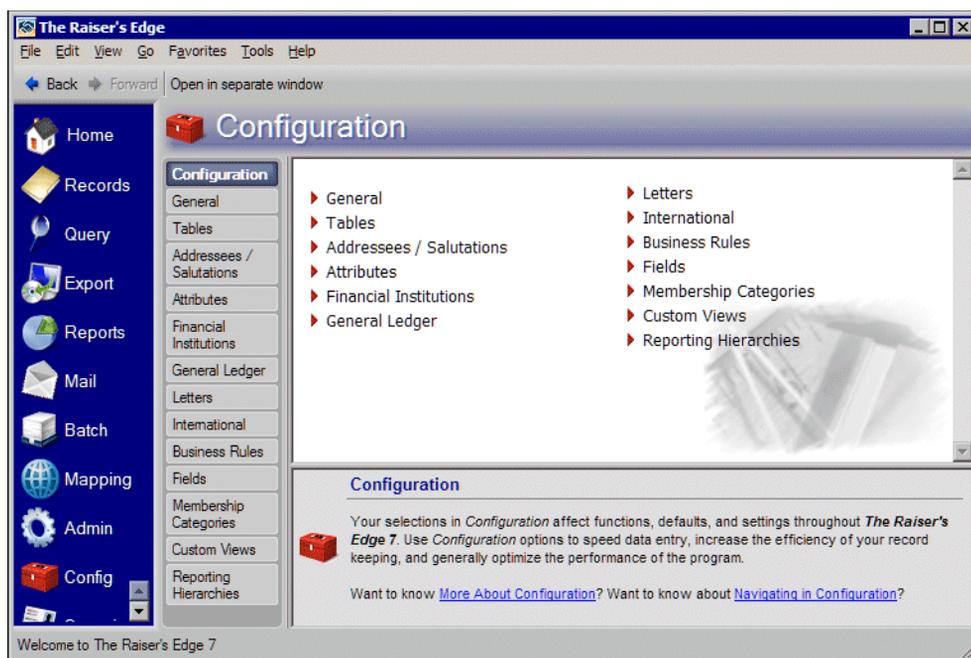
In *Configuration*, you can define addressees and salutations (Remember these? Dr. Bob and Sincerely Yours). You can also rename fields the way you want them to be named. You may not like the field names that come with the program. They may not fit your organization's style and flow. While changing the names of fields, you can go ahead and change their characteristics by making them hidden, required, or lookups.

When we say hidden, we mean you can actually choose to hide a field from a particular screen. It's still there, but it's hidden. Let's say all constituents you're adding to your database today are from the same city. You can choose to set a default for that city and then hide the field so you don't have to look at it every single time you're adding a constituent. You can make fields required too. This means you absolutely, positively have to fill in that field because it's required. If you want to make a field a "lookup," you can. When a field is a lookup, you can select your choice for that field from a table of choices.

In *Configuration*, you can enter financial institution information (such as banks), specify currency and address block formatting information for other countries, and work with custom views. You can also work with attributes, membership categories, and Blackbaud's *General Ledger*. Whew! As if that's not enough! You can also create business rules to control a wide variety of functions such as defaults for adding gifts and messages to appear when you open or add certain records. What are business rules? Business rules are a part of *Configuration* that allow you to add a lot of flexibility when working with fields and records. We'll talk about business rules in the next section.

Remember...

Config only appears on the Raiser's Edge bar if your security settings allow it.

The key to *Configuration*, is number one, knowing it's there. It's your behind-the-scenes helper and can either help you or harm you in terms of using the program.

Open For Business

Now that you've learned about *Configuration* and how important this section is in the program, we can talk a little bit about business rules. Even though business rules are part of *Configuration*, they deserve their own section because they're just that important!

At this point, you may be thinking that anything using the words "business" and "rules" together is just not for you. Well fear not! It sounds intimidating, and to an extent, it should be. But really business rules, much like other parts of *Configuration*, serve as your behind-the-scenes helper. Setting up business rules can actually make your life easier. Business rules are part of the *Configuration*. They help you organize layers of the program to behave the way you want. Business rules are very specific rules that you want the program to follow in certain instances. A popular example of a business rule is the Class of format for alumni information. When working with your alumni, you can choose to view class years in a 2-digit or 4-digit format, such as '03 or 2003. Once this is set, every class year you see for an alumnus will be set in one of these two formats.

The purpose of business rules is to make your life easier. Think about the options you want to set, whether they be for batches, gifts, or events. What will help your organization be most consistent? When you've figured that out, you're halfway there.

One more thing about business rules. Even though user options, configuration settings, and business rules are in theory all about the settings you want, you must remember that user options are log-in specific, while business rules affect all workstations using *The Raiser's Edge*. You can set business rules only if you have appropriate security rights established in *Administration*.

Whip Up a Batch

Now it's time to put on your Betty Crocker hat and get to work. We're about to whip up a batch of gifts. A batch of gifts? No, we're not crazy, we've actually dedicated an entire module to creating batches of information. Why would the word "batch" be included in a software program? Well, what types of things do you associate with batches? A batch of cookies? A batch of reports or receipts? A batch is a group of items. In *The Raiser's Edge*, *Batch* is a module that you use to add information to your database in groups, which allows your data entry to move a lot faster. More specifically, you can add new constituents, and their gift and time sheet information, to your database using batches. There are three types: Constituent, Gift, and Time Sheet (and yes, you can add sprinkles on top if you'd like!).

You can use constituent batches to add new constituents to your database. Not only can you add a new individual or organization, you can add everything from the constituent's address, phone number, age, spouse information, and even information about where they went to school and what their job entails. Adding new constituents through a batch is the same as adding constituent records through *Records*. You have the same capabilities of adding constituents through *Batch* as you do in *Records*, except you can add a ton at the same time! How does this help you? By saving you lots and lots of time!

For example, let's say you've gathered all the prospective donor cards handed in at your Annual Open House. You may have 20, 50, or even 100 people to add as prospective donors to your database. Think how efficient it would be to add all of your constituents at the same time, using one constituent batch! You can select the fields you want to include on the new constituent record, and then when you decide to apply the contents of your batch or "commit" the batch to the database, new records are created just as if they were created one at a time through *Records*.
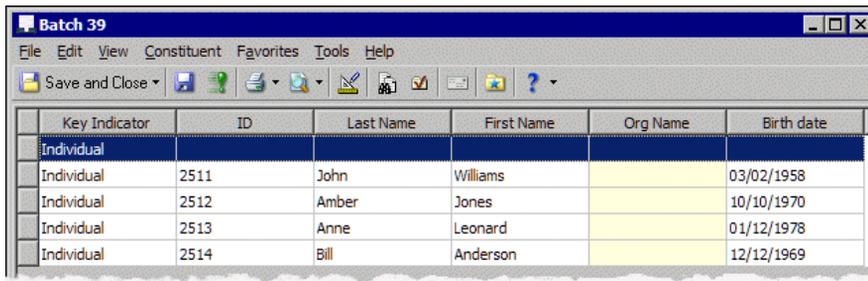
With gift batches, you can search for constituents that already exist in your database and add gifts for those constituents. Once you commit the gift batch to the database, the gift and all of its details are stored on the constituent record, as well as the gift record. This is what's so neat about *The Raiser's Edge*. Everything intertwines together. Of course, you may have times when you receive pledges or cash donations from constituents who are also first-time donors not yet in your database. Don't worry! You have the capability to add new constituents and their gifts to the database at the same time.

Time sheet batches allow you to work with a constituent's time sheet information for a job. A time sheet summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time. Once you create a new time sheet batch, you can search for the volunteer's name and for the job you assigned the volunteer. You can then add information to the batch, such as hours worked and position worked.

You can also track job information, such as the department under which the job falls, the location where the job took place, and the particular task performed. Once you commit the time sheet batch, the time sheet information is added to the Volunteer tab of a constituent's record. To use time sheet batches, you must have the optional module *Volunteer Management*. To learn more about *Volunteer Management*, see The Raisers Edge - Fully Loaded chapter.

User Options: Ingredients for Batch

So far, we've discussed user options in regards to a few places in the program, including constituent records and queries. With *Batch*, you'll work with user options in much the same way and from the same place...the Options screen. It's important to remember that with each part of the program you use, you can set options that affect how *The Raiser's Edge* looks and runs on the workstation you are using. Remember that these options are login-specific, which means 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.

Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals (say every five or 10 minutes), select the format for constituent names in batch reports and specify how you want to add default entries to a batch.

To begin setting some of your user options, select **Tools**, **User Options** from the shell menu. Select the Batch tab.
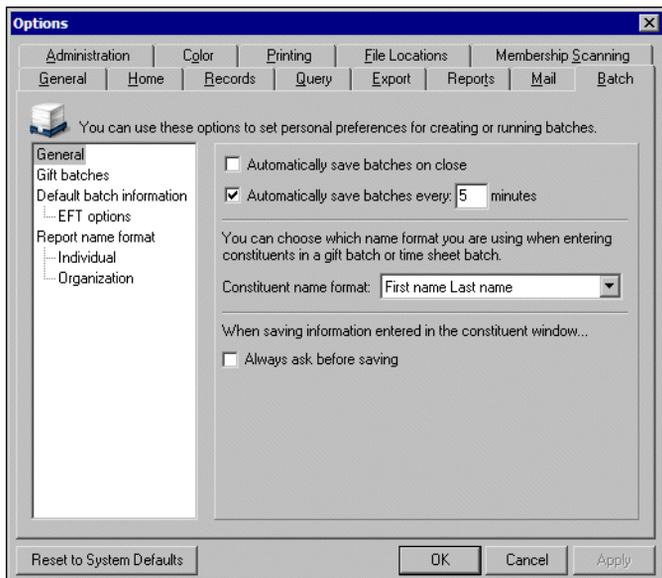
Go ahead and decide whether you want to automatically save a batch upon closing and decide in what time interval you want to save batches. You also have options to format the constituent name when entering constituent names in the batch data entry grid. From the list on the left of the Options screen, you can select specific gift batch, EFT, and reporting options. EFT is an electronic funds transfer system you use to collect direct debit donations from your constituents. EFT is a great tool but requires a bit of knowledge before using. If you'd like to find out more about the optional module *Electronic Funds Transfer*, see The Raiser's Edge - Fully Loaded chapter.

Did You Know?

Required fields appear in aqua (by default). You can change the default color on the Color tab.

Getting into Batch

Okay, don't be afraid to get your hands dirty! Get in there and start working in a batch. You can access the *Batch* module by clicking **Batch** on the Raiser's Edge bar. The Batch page appears so you can work with constituent, gift, and time sheet batches.
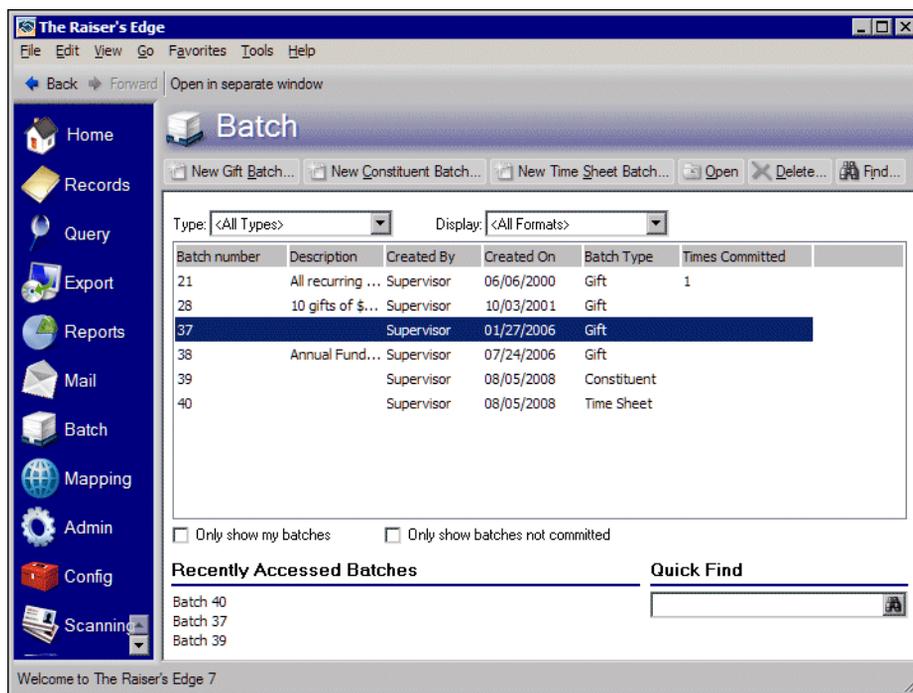
On the Batch page, you can commit batches, find batches, and open or delete them. The Batch page has the same look and feel of most of the other module pages. For example, the Records page shows a list of recently accessed records as well as a quick find option. So does the Batch page. Use these options to make finding and accessing your batch records easier.

▶ Open a batch

1. From the Raiser's Edge bar, select **Batch**. The Batch page appears.

2. Click **New Constituent Batch**, **New Gift Batch**, or **New Time Sheet Batch**. The Batch Setup screen for the batch of your choice appears, so you can begin to design your batch data entry grid.

Did You Know?

You can use Shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, from the Batch page, press **Alt+ B** on your keyboard to open a new gift batch.

How Do I Use a Batch? Just Read the Directions

To begin using a batch, you need to select fields and defaults that you want to appear on the batch grid. When you are setting up a batch, you are in "batch setup" or "batch design" mode. You can easily toggle back and forth between design mode and the actual batch grid. This sounds complicated, but it's really quite easy once you get the hang of it. Once you decide on the settings for the batch grid, you can move on to the actual batch data entry grid. So what's a data entry grid? Keep reading.

The batch data entry grid has the look and feel of an *Excel* spreadsheet. It contains lines in a grid with columns and rows. You can use your Tab key to move from column to column in the same way you would an *Excel* document.

All of the options you need to work with a batch are found in the batch data entry grid toolbar or menu bar. By using these options, you can easily add new constituents and gifts, validate the batch, view the properties for the batch, and commit the batch.

Working With Batches: High Speed Setting Please

Now that you understand the basic concepts of a batch and how it works, you can begin setting up, or designing, your batch. Constituent, gift, and time sheet batches are very similar. While you are presented with different options specific to either a constituent, gift, or time sheet batch, the process of creating and using all of them is relatively the same. And it doesn't matter what type of batch you are creating because you always save time and energy by adding your information through a batch. You are now ready to begin creating batches, so set it on high speed and let's go!
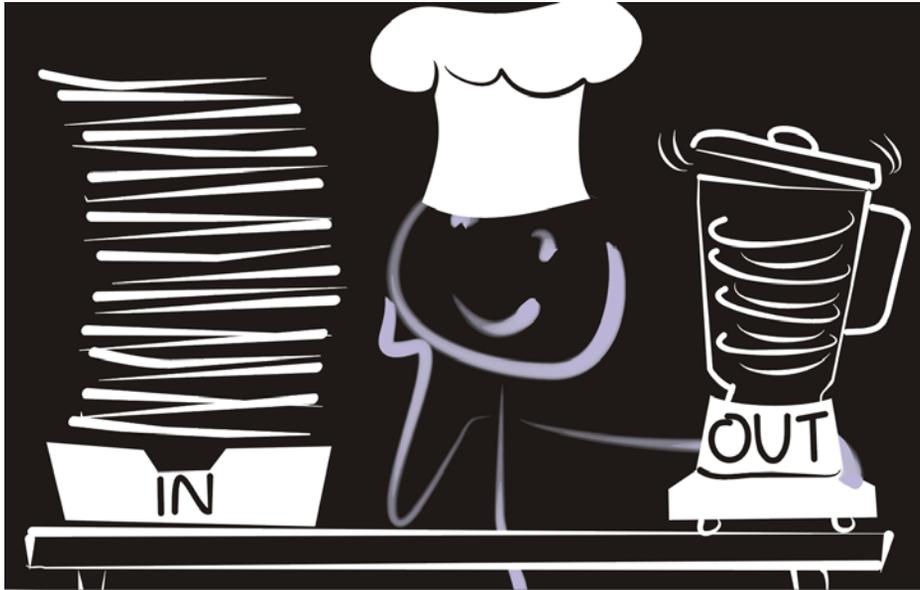
Constituent Batch: Vanilla

You can use the Constituent Batch Setup screen to design your data entry grid. This is where you select the fields that will make up your data entry grid. Ultimately, these fields will be part of the constituent records you are creating. In other words, what you select here is the information you will see on your records.
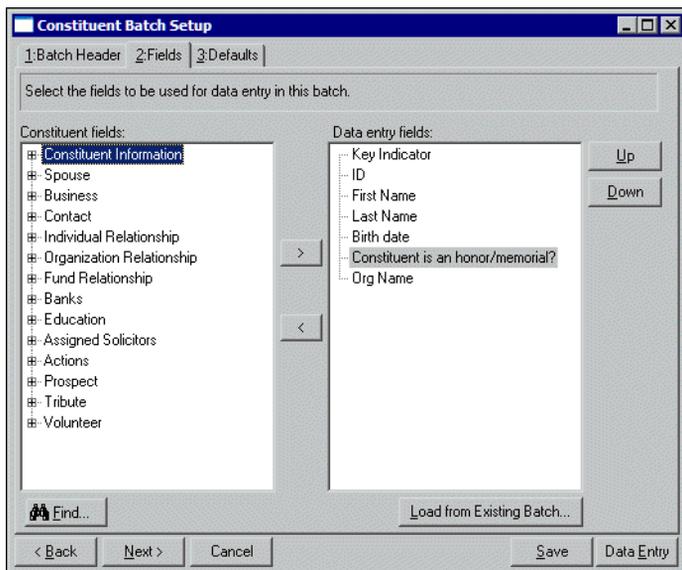
For example, you can select to include a constituent's address, phone number, occupation, and birth date in the batch. Once you commit the batch, records will be created for each constituent you added, and all the fields you chose to include for the constituent will exist on the record as well.

▶ Set up a constituent batch

1. From the Constituent Batch Setup screen, select the Batch Header tab.

2. On the Batch Header tab, enter a batch number to identify the batch you are creating. Include a description and specify if other users can access the batch.

3. Select the Fields tab.

4. The Fields tab lists all available fields you can include in your constituent batch. These fields will appear in your data entry screen for the batch. Go ahead and select all the fields you want to appear in the batch.

5. Select the Defaults tab.

6. From the Defaults tab, set defaults for fields you selected on the Fields tab. Defaults are useful if you are entering the same types of information multiple times. Say all of the constituents you are working with are alumni. Because of that, for the **Constituent Code** field, you can set a default of "AL". You can also select whether you want to hide or show the default fields.

7. Click **Save** to save the batch or click **Data Entry** to move onto the constituent batch data entry grid.

▶ *Use the constituent batch data entry grid*

1. From the constituent batch data entry grid, fill in the fields on the data entry grid with the information you want to appear on the constituent records.

2. Once you finish adding the information, click **Save** on the toolbar. You are now ready to validate and commit your batch. For more information, see the related sections in this guide.

Gift Batch: Chocolate

As with constituent batches, you can use the Gift Batch Setup screen to design your data entry grid. This is where you select the fields that will make up your data entry grid. The fields you select on this screen will be part of the gift records you are creating.
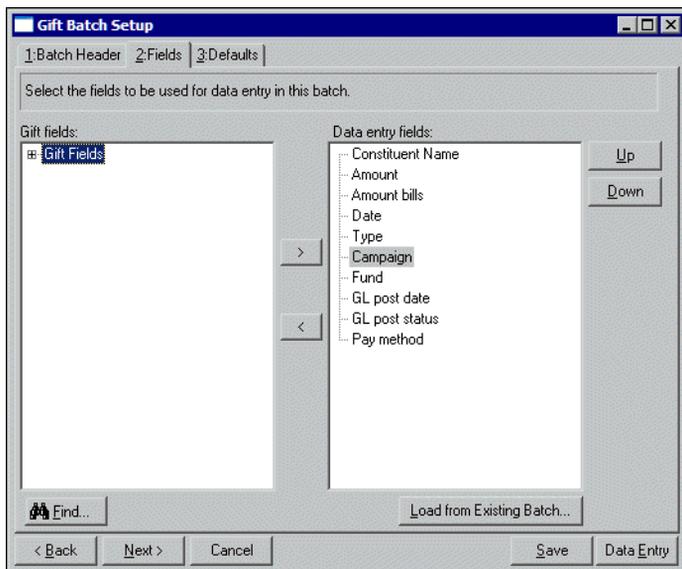
For example, you can select to include a gift's payment method, ID, or fund associated with the gift in the batch. Once you commit the batch, records will be created for each gift you added, and all the fields you chose to include for the gift will exist on the gift record as well.

In addition to creating new gift records for constituents, you can also apply gift payments to gifts that already exist in your database. When a constituent has a pledge or recurring gift set up, you can add payments to those existing gifts through a gift batch. When you commit the batch to the database, a payment is applied to the pledge or recurring gift.

▶ *Set up a gift batch*

1. From the Gift Batch Setup screen, select the Batch Header tab.

2. On the Batch Header tab, choose a batch number to identify the batch you are creating. Include a description and specify if other users can access the batch.

3. Select the Fields tab.

4. The Fields tab lists all available fields you can include in your constituent batch. These fields will appear in your data entry screen for the batch. Go ahead and select all the fields you want to appear in the batch.

5. Select the Defaults tab.

6. From the Defaults tab, set defaults for fields you selected on the Fields tab. Defaults are useful if you are entering the same types of information multiple times. Say all of the gifts you are working with are going to be applied to your Annual Fund. Because of that, for the **Fund** field, you can set a default of "Annual Fund". You can also select whether you want to hide or show the default fields.

7. Click **Save** to save the batch or click **Data Entry** to move onto the gift batch data entry grid.

▶ *Use the gift batch data entry grid*

1. From the gift batch data entry grid, fill in the fields on the data entry grid with the information you want to appear on the gift records or search for existing constituents with gifts so you can apply payments toward the gifts.

2. Once you finish adding the information, click **Save** on the toolbar. You are now ready to validate and commit your batch. For more information, see the related sections in this guide.

Time Sheet Batch: Anybody for Strawberry?

As with constituent and gift batches, you can use the Time Sheet Batch Setup screen to design your data entry grid. This is where you select the fields that will make up your data entry grid. The fields you select on this screen will be part of the time sheet records you are creating.
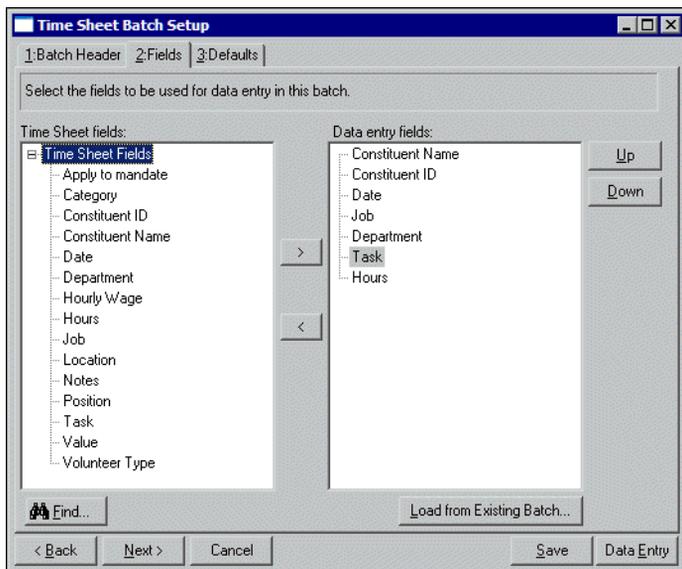
For example, you can select to include department and task information for a constituent's job. Once you commit the batch, the time sheet information is applied to that constituent's record.

▶ Set up a time sheet batch

1. From the Time Sheet Batch Setup screen, select the Batch Header tab.

2. On the Batch Header tab, choose a batch number to identify the batch you are creating. Include a description and specify whether other users can access the batch.

3. Select the Fields tab.

4. The Fields tab lists all available fields you can include in your time sheet batch. These fields will appear in your data entry screen for the batch. Go ahead and select all the fields you want to appear in the batch.

5. Select the Defaults tab.

6. From the Defaults tab, set defaults for fields you selected on the Fields tab. Defaults are useful if you are entering the same types of information multiple times. You can also select whether you want to hide or show the default fields.

7. Click **Save** to save the batch or click **Data Entry** to move onto the gift batch data entry grid.

▶ *Use the time sheet batch data entry grid*

1. From the time sheet batch data entry grid, fill in the fields on the data entry grid with the information you want to appear on the constituents' job records.

2. Once you finish adding the information, click **Save** on the toolbar. You are now ready to validate and commit your batch. For more information, see the related sections in this guide.

Validate Your Data (And Mix It Well)

Validating data simply means checking to make sure your data follows a certain set of rules. You want to know if you've crossed all your *T*s and dotted your *I*s don't you? *The Raiser's Edge* checks to see if there are data entry errors in your batch, such as constituents entered twice. When you validate a batch, *The Raiser's Edge* examines all constituents entered in the batch to determine whether any data entry errors exist.

In addition, it is important to validate a batch before or while you are committing it to the database so you can locate all the data entry errors. That's not saying you'll have any, but why not check anyway?

Did You Know?

You can validate a batch when the batch is open on more than one workstation. If you do this, the program checks only the gifts entered in the batch open on your workstation.

Constituent, gift, and time sheet batches are basically validated the same way. The program checks for certain things in each type of batch, but in general, you validate each type of batch the same way. This is really a way of double-checking to make sure your data is the way it should be. It doesn't, however, check to see that Bob's house is really on 1243 Abbey Road, or that the gift amount you entered for Bob's gift is the correct amount. But, it does allow *The Raiser's Edge* to do some basic validating.

Did You Know?

You can use Shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, to validate a constituent batch, press **ALT** + **T**, **V** on your keyboard.

When the program finishes validating a batch, the Validate Batch screen appears and displays the results of the validation process. Exceptions are created for any problem found in the batch and appear either on the Validate Batch screen or when you are committing the batch to the database. Other examples of exceptions include duplicate Social Security Numbers and spouses who are linked to existing constituents. For gift batches, you may have an inactive letter associated with a pledge.

If any exceptions are created, you can correct the problem and try committing the batch to the database again.

▶ # *Validate a batch*

1. From the Data Entry screen for a constituent, gift, or time sheet batch, select **Tools**, **Validate** from the menu bar. The Validate Batch screen appears.

2. Tell the program what you want it to validate by marking the appropriate checkboxes.

   For example, for a gift batch, to automatically apply a gift to a constituent's existing outstanding pledge or recurring gift, mark **Automatically apply gifts to pledges and recurring gifts**. When you mark this checkbox, the program determines whether each constituent who gave an eligible gift has any outstanding pledges or recurring gifts.

   ### Don't Forget...

   In a time sheet batch, when you select **Tools**, **Validate** from the menu bar, the batch is validated automatically. No screen appears asking you to mark specific validation options.

3. Click **Validate Now** to begin the validation process. The program displays a status bar showing the progress for the validation.

4. When the program finishes validating the batch, the Validate screen appears displaying the results.

5. Click **Print Exception Report** to print a report containing information about the exceptions in this batch.

Set On 350 Degrees and Commit!

When you are ready to "commit" your data to the database, this means you have finished working with new information in either a constituent, gift, or time sheet batch, and now you are ready to finally put that information to the database. The committing process cannot be undone. That is why we recommend validating your data before committing. Just like a cake you can't "unbake" it once it's cooked. Even if you burned it, well, there's just no going back. The same thing applies to the committing. Once you commit your batch, it's a done deal. That is why validating your data is so important.

When you finish working with your constituent, gift, or time sheet batch, you can apply the new information in the batch by committing it to the database. "Committing" is a term that simply means taking the information you added to your batch data entry grid and committing it so that all that information is applied (either added or updated) to specific records in your database. Once you commit the batch, the related records in your database are updated, or new constituent records are formed.

Just like validating a batch, committing a constituent, gift, or time sheet batch works in much the same way.

▶ Commit a batch

1. From the Data Entry screen of a constituent, gift, or time sheet batch, select **File**, **Commit Completed Batch** from the menu bar. The Commit Batch screen appears so you can specify options the program uses when it commits the batch.

2. Tell the program what rules you want it to follow during the commit process by marking the appropriate checkboxes.

   Just like you did when validating, you have a chance to tell the program the criteria you want it to follow. For example, to validate the batch before committing it to the database, mark **Validate batch before committing**. If you have not validated the batch, we strongly recommend marking this checkbox because validating a batch can locate problems you may encounter when you commit the batch.

3. Click **Commit Now**. When the program finishes committing the batch, the Commit screen appears.

4. If there are exceptions, you can click **Exception Report** to view an exception report, which gives you more details about the information the program was not able to commit to the database.

Campaigns, Funds, and Appeals

Here we are again. Earlier, in the Records chapter, we briefly mentioned the importance of campaigns, funds, and appeals when we discussed records in your database. If you predict heavy use of *The Raiser's Edge* to keep track of your fundraising efforts, then you must understand the importance of campaign, fund, and appeal records in your database.

Campaign, fund, and appeal records are stored as separate records in your database. You can access the campaign, fund, and appeal records through the Records page on the Raiser's Edge bar. The Records page appears, so you can work with new and existing records.
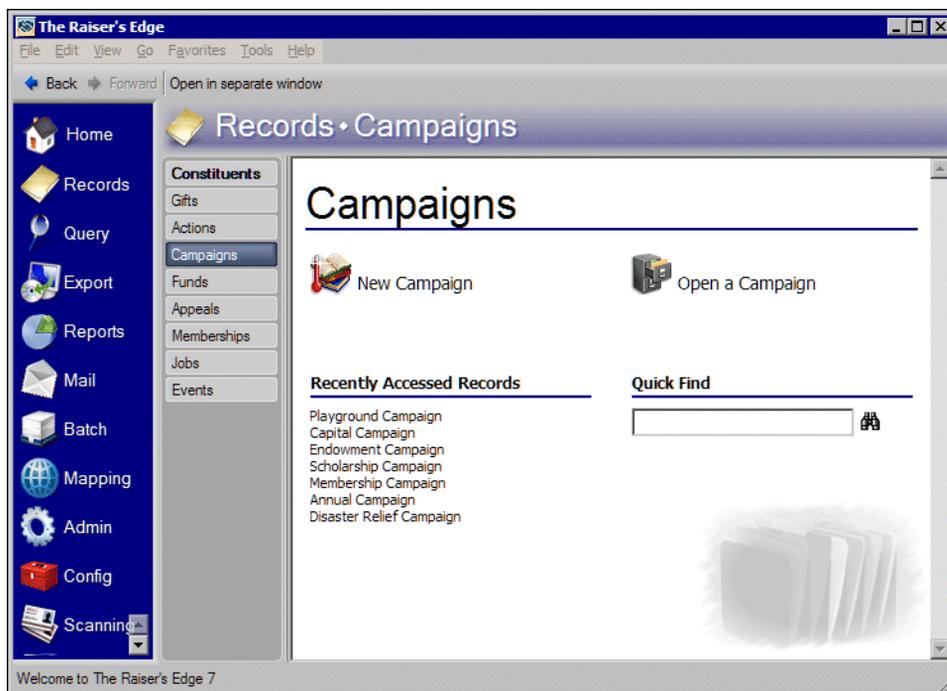
Each campaign, fund, and appeal record tracks separate but closely related information. In *The Raiser's Edge*, you can create new campaign, fund, and appeal records, and you can cross-reference records that already exist in your database.

Before you begin adding gifts and other fundraising information to your database, go ahead and set up a structure for your fundraising project, setting your goals and needs. To create this structure, you need a campaign that is the overall goal of your fundraising project; a fund or funds within that campaign, to which money can be donated; and finally appeals associated with the campaign and fund(s) that help you obtain the donations you hope to get for the overall campaign. So let's get started with campaigns and go from there.

Campaigns, Not a Pain Anymore

What can we say about campaigns? Two things. First, campaigns are probably the most important tool in any nonprofit organization. Second, they are notorious for being difficult to manage because campaigns are often huge. Many organizations have typical annual campaigns. These campaigns serve as sort of an ongoing solicitation for donations. They are often the biggest money-makers for any organization. Why? Because you can have numerous funds and appeals for every campaign.

Campaigns serve as an umbrella over funds and appeals. Campaigns are the "overall" picture of a fundraiser. The funds and appeals that fall under a campaign are what bring in the donations. For example, you have a New Building Campaign. Under the New Building Campaign, you create a Building Fund and a Landscaping Fund. These two funds are going to help generate donations to be used for your "new building". Under the New Building Campaign, you can also have appeals, such as a monthly newsletter or a fall phonathon. Appeals and funds work together to satisfy the needs of the campaign.

▶ ## Add a new campaign

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

2. On the Records page, click **Campaigns**. The Campaigns page appears.

3. Click **New Campaign**.

4. On the General tab, enter a campaign ID, description, start and end date, overall goal, and category.

5. Add any necessary notes in the **Notes** box.

6. To add solicitors for the campaign, select the Solicitors tab.

7. On the toolbar, click **Save and Close**.

We Suggest...

It's a good idea not to delete campaign records or any other records in your database if you think you might need them again at some point. Instead, you can simply make records inactive.

Funds, Funds, Funds!

Funds can be really fun. When creating funds for your organization, think about all the various things your organization can use. What do you need? What are your financial goals for the next five years? What are the types of programs you really want to implement while you are there? Be creative with your funds. Think of ways to use them as a tool in securing donations.

The same concept works for appeals. The more creative you are, the more people will respond.

Now, just to be sure we are on the same page here, a fund is a specific financial purpose for a gift. It's a little confusing at first, so it's not a bad idea to keep refreshing your memory! Funds, along with appeals, fall under the umbrella of the campaign.

For example, your organization has a General Operating Fund. The General Operating Fund falls under the umbrella of the Annual Campaign. In *The Raiser's Edge*, funds identify the financial accounts in which gifts and pledges should be recorded. Because all gifts must have a purpose, when you enter gifts, **Fund** is a required field on the gift record. Funds can be associated with campaigns and appeals so when you add a fund to a gift, associated campaigns or appeals automatically appear on the gift record. If your organization has many specific designated purposes for gifts, you may have many different funds and only a few campaigns.

▶ *Add a new fund*

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

2. On the Records page, click **Funds**. The Funds page appears.

3. Click **New Fund**.

4. On the General tab, enter a fund ID, description, start and end date, overall goal, and category.

5. Add any necessary notes in the **Notes** box.

6. To add solicitors for the fund, select the Solicitors tab. Keeping track of solicitors is important because they are the ones that are bringing in the money!

7. On the toolbar, click **Save and Close**.

Don't Forget...

When you mark **Fund is restricted**, donations made to the fund are for a restricted purpose.

Does It Appeal to You?

The second important part under the campaign umbrella is the appeals. Appeals track the sources your organization uses to generate gifts and the expenses associated with these sources.

Appeals are the means you use to raise money for your organization. They can be anything from a direct mailing to a phonathon to a dinner party. For example, your Annual Campaign contains a Building Fund and a Membership Fund. To raise money for your Building Fund, you have three appeals: Spring Phonathon, Monthly Newsletter, and Building Supplies Drive. These appeals work to sustain the Building Fund, which itself works to sustain part of the Annual Campaign.

From the Appeals tab of a constituent record, you can see how well a constituent has responded to your solicitations. But then again, we know they *always* respond to solicitations, right? The truth is, many constituents don't respond well to solicitations. Sometimes, they would rather give time and money to your organization at their own pace and time. That is why the Appeals tab is so helpful. This tab helps you understand the patterns of your donors, tracks every attempt you make to secure a donation, and shows you which ones are successful.

If you maintain a current list of appeals on your constituents' records, you can run reports to analyze the success of specific appeals. You can generate queries that group constituents together who have received 10 appeals, for example, but have never donated a gift. These constituents can then be focused on for heavier soliciting or perhaps for exclusion from future mailings. Tracking appeals is a great way to monitor your fundraising success and is easy to maintain.

▶ *Add a new appeal*

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

2. On the Records page, click **Appeals**. The Appeals page appears.

3. Click **New Appeal**.

4. On the General tab, enter an appeal ID, description, start and end date, overall goal, the number of constituents you are targeting for the appeal, and category.

Don't Forget...

If you mark **Appeal is inactive**, the appeal is flagged as inactive for appeal searches.

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5. You can also add default benefits for the appeal. Default benefits are benefits you can assign when you associate gifts with this appeal. Benefits can be anything from T-shirts to free tickets. Basically, they are incentives to keep giving and serve as gestures of thanks.

6. Add any necessary notes in the **Notes** box.

7. To add solicitors for the appeal, select the Solicitors tab.

8. On the toolbar, click **Save and Close**.

Importing, Not Smuggling

Have you ever been on an incredible vacation outside of the country and felt great pride in the treasures you found to bring back home?

Everything's great until you get to the point where you have to disclose your precious treasures before reentering the country. Then, you have to worry about bringing too much back with you or having to pay taxes on your precious findings. It's a bit frustrating isn't it? Well, essentially you are *importing* those items into your own country. You are bringing in treasures that you spent time accumulating, and for that, you are concerned about them. You want them to arrive in one piece don't you?

The same concept applies to the importing functionality in *The Raiser's Edge*. Importing information into *The Raiser's Edge* is invaluable. You've just spent a great deal of time making sure that the information existing in your database is accurate, well organized, and efficient. This data is important to you and your organization. When you decide to bring in or "import" new information into your database, you want that information to be necessary and correct.

With *Import*, you can bring new information into your database. You can also create import files containing information to export out of your database. Let's take an example. Say you periodically want to send your constituent addresses to another company to be checked and updated. You can create an import file of your constituent addresses and export them out of your database. Then, you can send them off to be updated and later import them back into your database, therefore updating your records. Because the information you bring in and out of your database is crucial, you must be very careful about how you

do this! Knowing as much as possible about *Import* is important before you begin changing your data. It is also important that you remember to back up your database before importing any information. At this point, we won't talk much more about *Import*. Just know that it plays an important role in getting information in and out of your database.
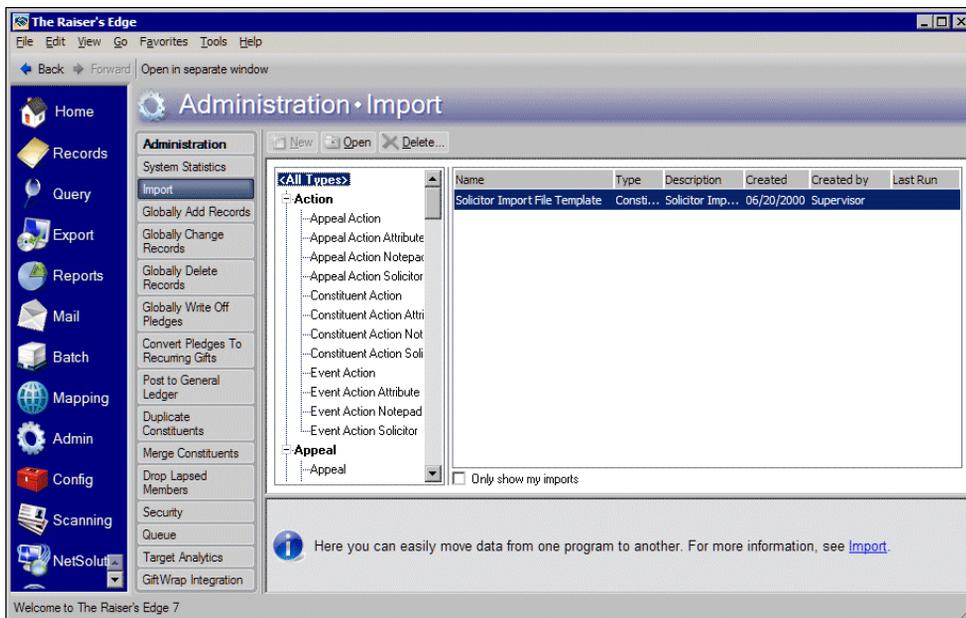
You can access *Import* by clicking **Admin** on the Raiser's Edge bar. Click **Import**. The Import page appears. From this page, you can create a new import, open an existing import, or delete an import.

Whether you are importing new information or creating import files filled with information that will later be brought back into the program, you are pretty protective of it. That's understandable. And *The Raiser's Edge* will do everything in its power to keep the information just the way you want it…but you have to know what types of importing you want to do, before you do it. Like we've said all throughout this guide, *The Raiser's Edge* is smart, but you are the one who's doing most of the controlling. You are making the decisions as to what information goes in and out.

The Art of Exporting

Exporting is extracting information from your database and sending it to some other place, mainly, another software application. You have the power to select the type of information you want to include in an export file, and you are ultimately responsible for telling *The Raiser's Edge* what to extract out of the database. Think of an export file as an open palette, if you will. The palette is blank until you decide what fields of information should be added to the palette. You control the type of information you want *The Raiser's Edge* to extract. Therefore, export files really are, shall we say, a work of art?

There may be times when you want to take data from *The Raiser's Edge* and send it to another program, perhaps to a word processing program for a mailing or to a spreadsheet program for further analysis. You can also use *Export* in conjunction with other program functions, like *Mail* and *Reports* or with outside programs like Microsoft *Word* and Microsoft *Excel*.

Using *Export* you can select the fields you want, extract the information you want to use, and create reports the way you want them to look. You can update the data in your export by saving the export record and using it as a template for similar exports. You can also document and print information from an export by using a control report.

The Raiser's Edge can create several types of exports. These export types provide access to all fields found in your database. You can use the export type as a way of filtering the fields available for your export. This is especially helpful if you already have an idea of the fields you want to use to design your export or the information you need to extract from your database.

Accessing Export

You can access export records by clicking **Export** on the Raiser's Edge bar.
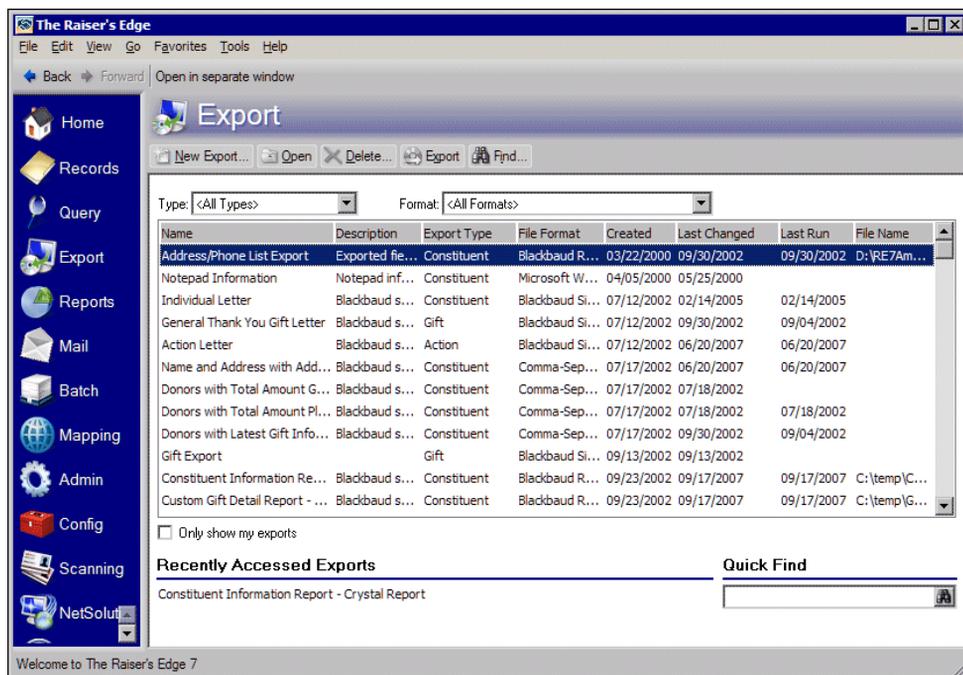
Once you create an export record, you can use it again and also modify the criteria or add and delete output fields. You can open an export record directly from the Export page.

Did You Know?

You can use Shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **Alt + N** on your keyboard to create a new export.

▶ *Access an export*

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

2. In the **Quick Find** field, enter the name of the export and click the binoculars. If no exports matching the description you provided exist, the Open screen appears.

3. Under **Find Exports that meet these criteria**, decide which criteria you want to use to search for the query and enter the information in the appropriate fields.

4. If you want to display only export records that meet the exact criteria you define, mark **Exact match only**.

5. Once you enter all your search criteria, click **Find Now**. The program searches the database and locates all export records matching the criteria you entered. These records appear in the grid.

6. Once you locate the export record you want, select it and click **Open**.

7. On the toolbar, click **Save**.

User Options for Export

Here we are again. User options. We've talked about user options with records, queries, and batches. These are options that you set to make the program look and feel the way you want. I think you probably have the hang of user options by now!

As we discussed earlier, 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 export 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 that apply to export records.
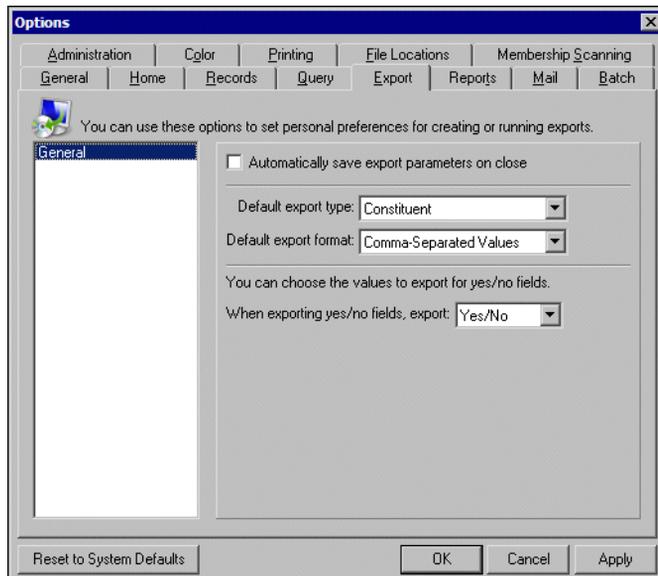
You can set options such as selecting a default export format. Export formats are formats you specify that determine the output of the export. Examples can be HTML or Microsoft *Excel* formats. Go ahead and select the options you want to apply for *Export*.

Did You Know?

If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**.

Export Types

To use *Export* properly, you need to understand the different export types. When you choose a specific export type, the program looks only at fields related to the type you choose. Export types determine the criteria groups available to include in an export. What we mean is, if you want to create a Gift export, only fields related to the gifts record are available. When searching for an export on the Export page, you can narrow your search by using an export type. You can select from the following export types.

Did You Know?

You can use an export type as a filter when searching for an export on the Export page.

Action. An Action export is based on the action record found on the Actions tab of an event or constituent record. Let's say you schedule a meeting with a group of constituents and want to send a letter to inform them of a meeting location change. You can easily create an Action export and pull out the fields you want to include in that letter.

Appeal. An Appeal export is based on the appeal record. You may want to look over the status of all your inactive appeals. You want to investigate why these appeals are inactive. Perhaps you want to make changes to the appeals and reuse them, or you simply want to keep track of expired appeals from previous years. To do this, you can use the Appeal export to extract the information you want to review and pull the information out into a Microsoft *Excel* spreadsheet.

Campaign. A Campaign export is based on the campaign record. Let's say you're preparing a campaign status report spreadsheet for your Board Members. You can use a Campaign export to pull out information about your campaigns you want to include in the report.

Constituent. A Constituent export is based on the constituent record. As we talked about in the Records chapter, constituents are individuals or organizations in your database who have donated time, funds, or resources to your organization. Constituent exports give you access to all fields you find in other export types. The Constituent export type gives you a complete picture of the entire constituent record, including information about gifts, relationships, memberships, and actions. Periodically, you may find yourself wanting to create a report detailing the amount each donor contributed to a specific campaign. You can use the Constituent export to pull out this information.

Event. An Event export is based on the event record and is available only if you have the optional module *Event Management*. Maybe you're planning your organization's annual conference. You need to create a spreadsheet with the name of all the events associated with the conference, all the participants assigned to each event, the names of the coordinators for each event, and the instructor or speaker for each event. This is a lot of information to track, but it's definitely needed. To track everything, you can use an Event export to retrieve all this information.

Fund. A Fund export is based on the fund record. An example may be that you are preparing for your annual board meeting and are asked to prepare a presentation regarding the status of all your active funds currently receiving donations (Don't worry, we won't make you wear a suit and tie for this presentation!). You can use the Fund export to retrieve the information from your database, therefore impressing your Board by showing them all the money you're raising.

Gift. A Gift export is based on the gift record. If you're meeting with a representative from a prospective donor company, for example, and she wants to know how many other companies are matching employees' donations, you can easily have this information available. All you have to do is use the Gift export to extract this information.

Individual Relationships. An Individual Relationships export is based on the relationship information found on the relationship record on the Relationships tab of the constituent record (That's a mouth full!). For example, you are planning your organization's Mother's Day event and want to create labels to send Mother's Day invitation cards to all mothers listed as relationships to the constituents in your database. You can use the Individual Relationships export to extract this information to create your labels.

Job. A Job export is based on the job record and is available only if you have the optional module *Volunteer Management*. Perhaps you're planning your organization's annual walk-a-thon, and your director asks for a breakdown of all volunteer positions that need to be filled for the event, the minimum qualifications needed for each, and the name of the person who filled that position last year. You can use a Job export to retrieve this information.

Membership. A Membership export is based on the membership record. The Membership export type is available only if you have the optional module *Membership Management*. If you find yourself needing to send a letter to all your members reminding them of the Members Day that your organization is planning for them, you can use a Membership export to retrieve all the information you need for your letters.

Participant. A Participant export is based on the participant information found on the Participants tab of the event record. This export type is available only if you have the optional module *Event Management*. Let's say you're preparing to create the seating assignment chart for your organization's annual banquet. You want to make sure you seat all the same type of donors in the same area and all participants are seated with their guests. How important is this? Very! You certainly don't want to sit Beth next to Jim who clearly is a guest of Jack (ouch). To make sure you don't screw up your seating order, use the Participant export to create a spreadsheet with all this information.

Export Formats

Export formats determine the way the data exported from your database appears in the data file. Export formats also determine which application will be used for the data output. Basically all this means is that if you choose to export your information in a Microsoft *Excel* format, then Microsoft *Excel* is the program that will be used to store your exported information. There are many export formats to choose from, such as HTML and Microsoft *Excel*. These may be familiar to you. However, other formats exist that you may not be so familiar with, such as Blackbaud Conditional Word Merge or FoxPro Database. No worries though. There are plenty of straightforward formats you can learn to use with no problem. Just know that the format types may be a bit foreign to you and that's okay. Most of time, you will find yourself using only a few export formats anyway.

Remember that export formats are especially important for address verification and other activities in which you are exporting information you plan to update and import back into *The Raiser's Edge* database.

How Do I Export?

To begin the exporting journey, you must decide what you want to export and how you want the information to look once it has been exported. To help with this, *The Raiser's Edge* offers two tabs where you can make these choices: The General tab and the Output tab.

General Tab - The Who

On the General tab, you can choose which records you want to include for exporting.
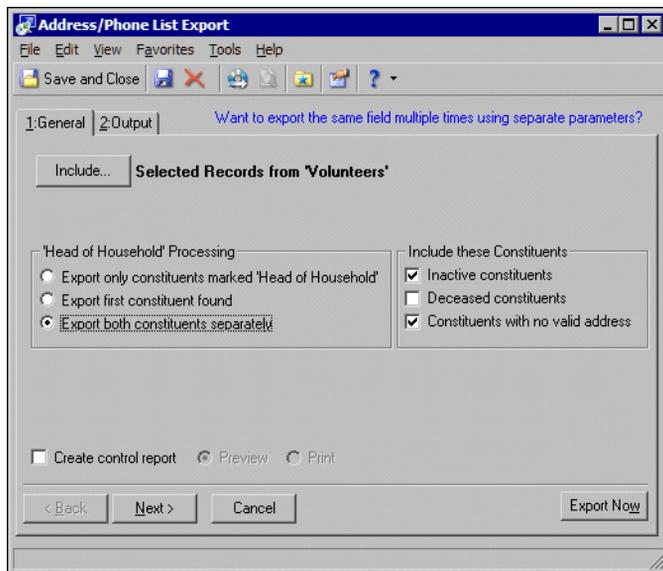
You can choose to use all records from your database, selected records from your database using a query, or one record from your database. You can also decide how to process individuals marked as **Head of Household** for example. If inactive, deceased, or constituents with no valid address should be included in the export, you can choose to include those types of constituent records as well. The General tab for each export type is different and displays information related to the type of export you are creating.

Output Tab - The What

On the Output tab, you can select the fields corresponding to the data you want to see in your export.
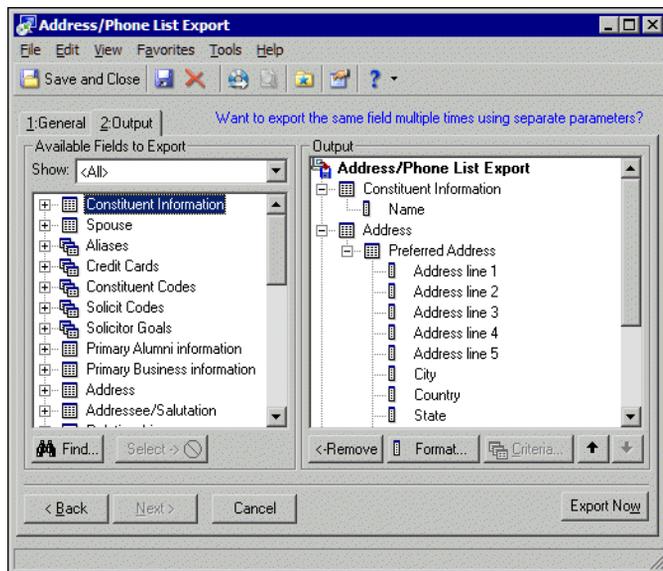
The Output tab is made up of two areas: the **Available Fields to Export** box and the **Output** box. The **Available Fields to Export** box displays a list of all fields available for your export. This is basically a list of every field you can choose to be included in your export. The fields available for selection depend on the export type you select. The **Output** box displays the fields you select for your export. You can also select formatting for certain output fields. For example, if you want to use a date field in your export, you can select to use the long or short format for the date.

Playing Favorites

Just like we discussed in the Navigating and Query chapters, you can add any export you use often to your list of favorites. This way, you can access the export directly from your Home page to save time. Take a look back at the Query chapter again if you're considering making favorites out of any of your exports.

Creating a Masterpiece

Now you're ready to create your exporting masterpiece! Remember, first decide the type of export you need and then choose the fields you want to display in the export file. You have the power of creation here. It's all up to you, and you can include as little or as much information as you need.

Once you create an export record, you can edit and reuse it as you update your database. The appearance of the export data files may differ depending on the export format you choose. For the example below, we are going to create a constituent export. Remember, several different export types are available. Refer to the Export Types section for a complete listing.

▶ Create a constituent export

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

2. On the Export page, click **New Export**. The Create a New Export screen appears.

> ### Don't Forget...
>
> If you do not have rights to certain records in *The Raiser's Edge*, you do not see that export type on the Create a New Export screen. For example, if you do not have rights to gift records, you do not see the export type of Gift.

3. Under **What type of export do you want to create**, select "Constituent" because you are creating a constituent export.

4. In the **Export format** field, select "Comma-Separated Values".

5. Mark **Include Header.** You want the first row of your export to contain the header names for the fields selected.

6. Click **Create Now.** The New Constituent Export record screen appears.

7. On the General tab, select the records you want to include in the export, and mark the options you want to apply to the constituent records you are choosing.

8. Select the Ouput tab.

9. Decide which fields you want to include in the export and move each field you choose into the **Output** box.

10. Click **Export Now**. You are asked to select a name and location to save the export file you have created.

11. On the toolbar, click **Save and Close**. Once you save the export record, you can locate the export file you just created by looking in the folder to which you saved the export file.

Custom View

Do you ever wish you could look at the data in your database the way that *you* want to? Perhaps your boss needs to view only specific information for a constituent without drudging through all the biographical data that exists on a record. Or maybe your director really loathes staring at a computer to find the information she needs. Well, guess what? (As if you didn't already know the answer). We've created a way for you to see only the information you want to see. It's called *Custom View* and it's just another snazzy part of *The Raiser's Edge*.

With *Custom View* for ***The Raiser's Edge***, you can create a customized view of individual and organization constituent records in your database. This makes it possible to view records containing only the information you want to see. You choose to view what is important and functional for you and your organization. Imagine that! A view *you* create with the information *you* need to see.

Let's say you want to create a biographical view that includes basic biographical information for a constituent. We'll name it "John's View" because you are the one who accesses biographical views all the time. "John's View" lists biographical data such as the name, address, and phone number for a constituent. When you want to view only such information for a constituent, you can apply "John's View" to a constituent record in your database. Or say you create a view containing all volunteer-related fields. You can name it "Volunteer view" and access this particular custom view when you need to see only volunteer information for a constituent.

Accessing Custom View

You can access custom views by clicking **Config** on the *Raiser's Edge* bar. On the Configuration page, click **Custom Views**.

From the Custom Views page, you can create new custom views and edit existing custom views.

▶ Open a custom view

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Custom Views**. The Custom Views page appears.

3. Click the link of the custom view you want to open. The custom view appears.

4. Make any necessary changes to the custom view and click **Save and Close** on the toolbar. You return to the Custom Views page.

The View Is up to You

So what is it about your constituents that you really need to see on a day-to-day basis? What can you do without? For example, if your role is strictly data entry, you probably want to view fields for a constituent's address, phone number, and perhaps educational background. If you don't work with constituent gifts, why do you need to see donations made by that constituent in the last year, for example? You don't! Create a custom view that you can quickly pull up a constituent record and apply a basic bio custom view.

You can even add pictures and format the screen the way you want it. Why not use a notebook graphic to denote alumni information? Or format all your field labels to be red and bold? Be creative and take advantage of the tools available.

Let's take a look at a custom view while it's being created. In the following screen, you can see the Fields screen and the Custom View Designer screen. These are the two screens that you use to build your custom view. You can drag and drop the fields from the Fields screen onto the Designer screen. You then add color, change the font, and specify other properties for your view.
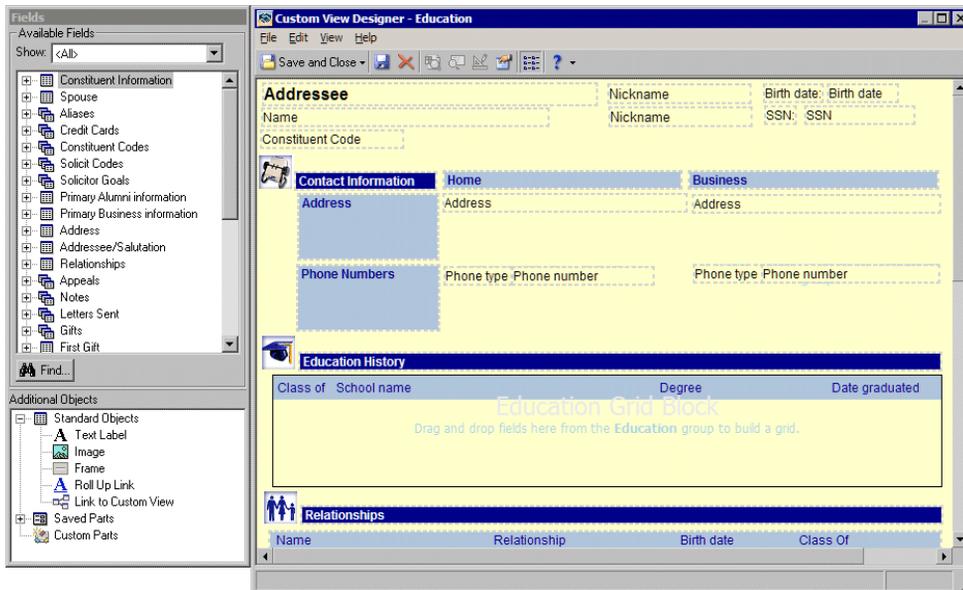
Check out the next sections to see what your view looks like when applied to a constituent record.

▶ Create a custom view

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

2. Click **Custom Views**. The Custom Views page appears.

3. Click **Create a new Custom View**. The Custom View Designer and Fields screens appear.

4. Drag and drop the fields you want to view onto the Custom View Designer screen.

5. Once you decide which fields you want, you can apply properties and formats to the fields using the Properties screen.

6. Make any other changes to the custom view and click **Save and Close** on the toolbar. You return to the Custom Views page.

Ready to View?

Your "customized" view has been created, and it contains all the important stuff you care about seeing. You can apply the view at any time

Views are applied to a constituent record. What this means is that you basically can't mess up any of your record data. You are manipulating the view, not changing, hiding, or deleting any data.

To apply a view, simply open a constituent record and choose which custom view you want to apply from the record toolbar. All the custom views you created appear in a submenu (or drop-down) from the toolbar. Once you apply the view, you can easily switch back to what you had before. In other words, you can switch back to the normal view of the constituent record as it was before. We call the normal view "edit" mode (Try throwing that around at your next party).

The following screen shows you how a constituent record looks with an applied custom view.

Want to know exactly how to work with these views? Check out the next procedure.

Don't Forget...

To apply a custom view to both an individual or organization record, you must select "Both" in the **View format** field on the Save as screen. This is the only way you can apply a single custom view to both an individual and an organization record.

▶ *Apply a custom view*

1. From a constituent record, click **Run Custom View** on the toolbar. A list of custom views appears.

2. Select the custom view you want to apply by clicking once on the name of the custom view. The custom view is immediately applied to the constituent record. You are now in Custom view mode.

> ### Remember...
>
> Custom views you create and apply to a constituent record appear in a Microsoft *Internet Explorer* window.

3. After you finish viewing the record, click **Save and Close** on the toolbar.

> ### Did You Know?
>
> You do not have to close the Custom View Designer screen to apply a custom view to a constituent record. You can apply custom views to a constituent record while working in *Custom View*.

Change It, Rearrange It

To use advanced custom parts with *Custom View*, you must have the optional module *VBA for Advanced Customization*. With the optional module *VBA for Advanced Customization*, you can tweak *The Raiser's Edge* to design customized screens that fit the purposes of your organization. For more information about using custom parts, contact Customer Support or see the *RE:VBA/API* help file. To view the help file, select **Help**, **RE:VBA/API** from the menu bar of *The Raiser's Edge*.

For more information about custom parts, see the RE:VBA/API help file and the *VBA Essentials Guide*. To view the help file, select **Help**, **RE:VBA/API** from the menu bar in *The Raiser's Edge*. To access the user guide, select **Support**, **User Guides** from the menu bar on our website at ww.blackbaud.com.

CHAPTER 8

Time Out: Help Yourself

> "We make a living by what we get, we make a life by what we give."
>
> - Sir Winston Churchill

In This Chapter...

▶   The Raiser's Edge Top 10
▶   Self-Help First!

Now that you've gotten a glimpse into the depths of *The Raiser's Edge* (your head may be spinning by now!), let's take a step back. You've just seen how *The Raiser's Edge* can take care of any possible fundraising need you have. And as with any new product you learn, you will have questions! The last two chapters in this book take you through more options you can use with the program, contact information, and other valuable resources you can use as you begin working in *The Raiser's Edge*.

But for now, let's take a time out and go over a few quick resources you can use as you begin working in *The Raiser's Edge*. First, take a look at the Raiser's Edge Top 10 which will give you an idea of the most popular areas of the program...areas that can act as a real timesaver. Second, click Support on our website at www.blackbaud.com to learn about the resources we've developed to provide the help you need. Features include our Knowledgebase, which provides answers to "How To" questions and steps to resolve issues and error messages; the forums, where you can discuss best practices with other users; and the user guides, which provide in-depth explanations for using *The Raiser's Edge*.

The Raiser's Edge Top 10

Follow this list to optimally use *The Raiser's Edge*. It may not be as funny as David Letterman's Top 10 list, but it's definitely more helpful. To look for more about these tips in other chapters, search the index or looking for the timesaver graphic throughout this book. If you follow these Top 10 Tips, you'll use *The Raiser's Edge* like a pro in no time.

♦ Save your *parameter files*. You can reuse or edit saved parameter files so you don't have to recreate reports and mailings each time.

♦ Don't forget to use *Favorites* so you can focus on just the parts of *The Raiser's Edge* you need to use everyday.

♦ Customize your "workspace" by using *Home Page*.

♦ Use *Dashboard* to create reports and get a glimpse of how your fundraising efforts are going.

♦ See only the fields and information you want with *Custom View*.

♦ Speed up your data entry by using *Batch* to enter data in spreadsheet format.

♦ Press **F1** anywhere in *The Raiser's Edge*. The program knows where you are and offers help on the area you're in. So easy!

♦ Set *User Options*, or rules, to make *The Raiser's Edge* behave the way you want on the workstation you are logged into.

♦ Add system-wide *Business Rules* to help work more efficiently in *The Raiser's Edge*. This is so everyone in the office can work the same.

♦ We can't say this one enough! *Back up* your data!

Resources

When you have questions about our products, we want to answer them right away. Therefore, we offer several resources to help you get the help you need when you need it. To get started, click **Support** on our website at www.blackbaud.com.

To access many of our resources, you must be logged in to the website. Click **Please Log in** on any page, enter your user name and password, and click **Log in**. If you don't know your user name or password, click **Login Help** for assistance.

✔ **Customer Support Guide**

The *Customer Support Guide* explains the benefits of maintenance, introduces you to the many Support resources, and empowers you to use these resources effectively. To access the *Customer Support Guide*, click **Support** on our website.

✔ **Knowledgebase**

For answers to "How To" questions and steps to resolve issues and error messages, turn to Knowledgebase, which is updated with new solutions each day. Support analysts record every question they are asked and the answers they provide in Knowledgebase. If your question has been asked before, you can find the answer here. To access Knowledgebase, select it from the **Support** menu on our website.

✔ **FAQs**

The FAQs include the most recently asked questions from the previous month. Each question is linked to a Knowledgebase solution. To access FAQs, select it from the **Support** menu on our website.

✔ **Forums**

The forums are a gathering place for everyone in the nonprofit community to exchange ideas. If you have a question about best practices or have discovered a creative use for *The Raiser's Edge*, take advantage of this opportunity to share your knowledge and brainstorm with others. The forums also contain documents shared by other users, including policies and procedures manuals, database request forms, and sample letters. To access the forums, select it from the **Support** menu on our website.

✔ **The User's Edge Newsletter and Blog**

The User's Edge is the title of both the newsletter and blog about *The Raiser's Edge*. The newsletter arrives in your inbox monthly; the blog is updated several times a month. To access the blog, select **Company**, **Blogs** from the menu bar on our website. Both the newsletter and blog include the latest information and tips about using *The Raiser's Edge* effectively. We encourage every user to subscribe!

✔ **User Guides**

The user guides contain step-by-step instructions and in-depth explanations for using *The Raiser's Edge*. To access the user guides, which open in Adobe *Acrobat Reader*, select **Help**, **User Guides** from the menu bar in *The Raiser's Edge*, or select **Support**, **User Guides** from the menu bar on our website. For help selecting which user guide best suits your needs, see *Which Guides Should I Read* in the **Getting Started** section.

✔ **Help File**

While you work in *The Raiser's Edge*, you can press **F1** on your keyboard or select **Help**, **Raiser's Edge Help topics** from the menu bar to open the help file. To find specific information about a process or function, type the keywords in the search field.

The Raiser's Edge - Fully Loaded

> "I have found that among its other benefits, giving liberates the soul of the giver."
>
> - Maya Angelou

In This Chapter...

► Which Do You Prefer - Automatic or Stick?
► You've Got Me Sold!

In automotive terms, *The Raiser's Edge* has all the sparkle and speed of a sports car, storage room of an SUV, and dependability of a sedan. Let's see if you can find something like *that* in your local car lot! Not only can this program go from zero to 60 in four seconds, it can run your reports and process your queries too! It truly is the leader in its class, and rightfully so. *The Raiser's Edge* is already the hottest software for nonprofits on the market, and literally every time you turn around, new and better services are being created to enhance the program.

While enhancements to the program come in the form of design changes and additions within the program, enhancements also take the form of additional products, such as optional modules that work with *The Raiser's Edge*, customizing it to suit your organization's specific needs. In much the same way as buying a car, with *The Raiser's Edge* you can select the accessory packages that work best for you. But instead of choosing leather interior, you get to choose optional modules such as *Alumni Tracking* and *Event Management*. So, if I were you, I'd buckle up and hold on tight, because this ride isn't about to end anytime soon!

Which Do You Prefer - Automatic or Stick?

The question is simple enough isn't it? Well, for some it is, but it really depends on what you're comfortable with. No matter what type of decision maker you are, you should carefully consider some things before deciding on what bells and whistles you'd like to have (of course AC is a given).

The Raiser's Edge is powerful, and when you use additional products designed to work with *The Raiser's Edge*, you are allowing it to work even better. Your organization may not need every optional module or additional service available with *The Raiser's Edge*, so carefully consider the functions of your organization before determining which modules are appropriate for you.

So what are these things called *optional modules*? Optional modules are additional software modules or additional *pieces* that work with **The Raiser's Edge**, allowing you to do all sorts of cool things. For example, the optional module *Alumni Tracking* is used by educational organizations to help contact, solicit, and better manage alumni information. Through this module, you can track your alumni and their educational status.

Another optional module is *Event Management*. With this module, you can manage all aspects of your events such as banquets, tournaments, or even training classes.

Remember...

When you purchase an optional module such as *Alumni Tracking* or *Event Management*, you are given a code. You must enter this code to "unlock" or activate the optional module to begin using it. Most optional modules appear on the Raiser's Edge bar as icons, but some do not. Consult the user guide for a specific optional module to find out how to access it.

Because optional modules enable the program to work at a higher level, there's also room for more complication. Remember, at this point, you are just starting to grasp the concept of what **The Raiser's Edge** can do. Without optional modules, **The Raiser's Edge** can do plenty. So, don't feel you need to get into optional modules right away. Also, remember that not all optional modules are necessary for your organization. Just because a sun roof and CD changer are available, doesn't mean you *need* them. The key is to understand and use the program to its full potential and to carefully consider which optional modules will help your organization to reach its fundraising goals.

In addition to optional modules, other products are available to work with **The Raiser's Edge**. After you select your car, you may look into buying some sort of roadside assistance right? Well, plenty of additional products are available, other than just optional modules, that work with **The Raiser's Edge**. For example, *MatchFinder* is a CD that contains information about matching gift

companies. Using this CD in accordance with *The Raiser's Edge* lets you determine which companies have the potential to become matching gift donors to your organization. Another example is Blackbaud Analytics. Blackbaud Analytics is a service that identifies your best charitable giving prospects.

Whatever the additional product of choice is for you, understand that it needs to be right for your organization. Sure, the automatic seat warmer is snazzy, but not if you live in Florida! Whatever your needs are, from leather interior to tinted windows, *The Raiser's Edge* has it.

Let's Test Drive It

Many different "extras" are available with *The Raiser's Edge*. Whether you're in the market for an optional module or two, a service, or a customization feature, you can choose from plenty. The following section lists each additional service or product designed to work with *The Raiser's Edge* and gives a brief description. Are you ready? Then kick the tires a few times and let's go for a spin!

✓ AddressAccelerator

Have you ever worried about incorrect addresses or formatting issues when doing your mailings? Well, no need to worry anymore! Blackbaud offers a CASS-certification subscription service, *AddressAccelerator*, which automatically standardizes spelling, abbreviations and punctuation, and adds ZIP+4 Codes and carrier-route information to your addresses. Cool, huh? The benefits of having a service like this can greatly reduce lost, misdirected, and returned mail. You can stay continuously CASS-certified with regular updates that are instantly compatible — no importing or exporting required. You can use *AddressAccelerator* alone or in conjunction with *PostalSaver* to sort your mailings appropriately for further reduced costs. You can also determine which constituents have moved using *AddressFinder*, Blackbaud's National Change of Address (NCOA) service.

✓ Target Analytics

Target Analytics can help you increase the amount of funds you raise. Target Analytics can pinpoint your best charitable giving prospects, therefore helping you figure out which individuals and organizations you should try and solicit donations.

- *ProspectPoint* analyzes historical and current data from external sources and behavioral trends to show you which individuals are your best annual, major, and planned giving prospects for today and in the future.

- *WealthPoint* is a wealth identification and information service that uses financial, biographical and demographic data to identify and profile the wealthiest individuals in your database, so you can plan the most effective cultivation strategies for your major donor prospects.

✓ The Information Edge

The primary goal of business intelligence is to help you make informed decisions faster as a result of high speed, interactive data reporting and analysis. Blackbaud's comprehensive business intelligence solution, *The Information Edge*, extracts data from transactional and operational programs (including *The Raiser's Edge*), manipulates the data, and quickly displays it back in significant ways such as interactive reports. Because *The Information Edge* is multidimensional, it enables you to navigate through huge amounts of data and to organize that data into meaningful business structures. *The Information Edge* provides a multidimensional conceptual view of the data, allowing diverse bits of information to be cross-tabulated against each other to deliver matrix reporting and graphs.

✓ MatchFinder

MatchFinder provides you with information about matching gift programs within companies. Matching gift programs can vary, but most programs will match the employee donation in some form. *MatchFinder* is a database of matching gift companies and is shipped on a CD to you. More than just a database, *MatchFinder* allows you to determine which companies in *your* organization's database match gifts.

✔ Membership Scanning

Membership Scanning is additional functionality available with the optional module *Membership Management.* With *Membership Scanning*, you can scan barcodes to retrieve membership information from your database in *The Raiser's Edge*. *Membership Scanning* is ideal if your organization distributes and uses membership cards for anything from entrance to your museum, zoo, or an event, to discounts at your gift shop. When you scan in a membership card, the member information immediately appears on the Membership Scanning page for you to review.

✔ AddressFinder

Use *AddressFinder* to find new addresses for individuals who have moved and help reduce the amount of undeliverable or delayed mail. *AddressFinder* is licensed by the US Postal Service to provide NCOA (National Change of Address) services by accepting a data file in a specific format and comparing it with the NCOA database. *AddressFinder* also verifies correct addresses; standardizes spelling, abbreviations and punctuation; and adds ZIP+4 Codes and carrier-route information to your addresses. You can use the *AddressFinder* service alone or with the optional module *PostalSaver* to sort your mailings appropriately for further reduced costs. We'll talk about *PostalSaver* later in this list.

✔ Point of Sale

With *Point of Sale*, you can exchange information between Microsoft's *Store Operations* and *The Raiser's Edge*. Through *Point of Sale*, you can transfer constituents entered in *The Raiser's Edge* into *Store Operations*, where you can establish them as customers. You can also establish individuals who are not constituents, such as spouses, contacts, and people receiving *The Raiser's Edge* membership cards, as separate customers in *Store Operations*.

The Raiser's Edge can be updated with actions, notes, attributes, and *Store Operations* phone and e-mail information for all constituents who have made purchases in *Store Operations*. You can also specify that new customers in *Store Operations* be entered as constituents in *The Raiser's Edge* based on items they purchased.

✓ Mapping

With *Mapping*, you can exchange information between Microsoft's *MapPoint* and *The Raiser's Edge*. Through *Mapping*, you can define the data you want to map, save your maps, and retrieve your maps. In addition, you can navigate to specific constituent records in *The Raiser's Edge* from mapped locations in *MapPoint*.

✓ AuctionMaestro Pro Integration

With *AuctionMaestro Pro Integration*, you can exchange information between MaestroSoft's *AuctionMaestro Pro* and *The Raiser's Edge*. Through *AuctionMaestro Pro Integration*, you can integrate constituent and gift records in *The Raiser's Edge* with your auction and people records in *AuctionMaestro Pro*.

In addition, with the optional module *Event Management*, you can integrate the two programs to help manage all aspects of your auction events. You can associate an event record in *The Raiser's Edge* with auction databases in *AuctionMaestro Pro* and transfer event data from *The Raiser's Edge* to *AuctionMaestro Pro*. When you download auction transactions from *AuctionMaestro Pro*, you can also create new participant records in *The Raiser's Edge* for new auction participants in your *AuctionMaestro Pro* people database.

✓ CounterPoint SQL Integration

With *CounterPoint SQL Integration*, you can exchange information between Radiant Systems *CounterPoint SQL* and *The Raiser's Edge*. Through *CounterPoint SQL Integration*, you can use *The Raiser's Edge* to access *CounterPoint SQL*'s ticket entry system, access media and sales tracking reports, and download donations from the product sales system. While increasing efficiency and accountability, this integration helps support your mission and develop your constituency.

In addition, with the optional module *Membership Management*, you can you can use *The Raiser's Edge* sell products in *CounterPoint SQL* based on membership status and upgrade, renew, downgrade, or sell a membership.

✔ PostalSaver

PostalSaver presorts envelopes and labels using postal regulations; ensures address quality; and prints required postal reports, barcoded address labels, and sack and tray tags. Using *PostalSaver* is a great way to receive postal discounts on your mailings. Additionally, Blackbaud's CASS-certification subscription services, *Address Validation* and *NCOA On-Demand*, verify correct addresses; standardize spelling, abbreviations and punctuation; and add ZIP+4 Codes and carrier-route information to your addresses.

✔ Alumni Tracking

Alumni Tracking is widely used by education systems to track, contact, and solicit alumni. An education record stores the educational background for a constituent. A constituent can have more than one education record, but *The Raiser's Edge* gives you the ability to mark one as the main or most recent record for the constituent. This is a valuable tool when working with constituents or their friends and relatives who have numerous education records.

✔ API for Advanced Application Development

Use *API for Advanced Application Development* to give other software programs access to *The Raiser's Edge* data and services. With *API for Advanced Application Development*, technical staff can use programming languages such as Visual Basic, Java, C++, VB Script or JavaScript to create a "front-end" to *The Raiser's Edge* or design customized programs that integrate with the system. For example, create links from *The Raiser's Edge* to software for patient tracking, human resources, ticketing, and the Internet.

✔ Electronic Funds Transfer

When you receive gifts donated by credit card or direct debit, you can process the transactions using an electronic funds transfer called EFT. *Electronic Funds Transfer* for *The Raiser's Edge* is a banking system that takes deposits or bill payments and moves them electronically from a donor's bank account or credit card to your organization's bank account.

✔ Event Management

Event Management is an event management module that works with **The Raiser's Edge** to help you manage all aspects of your events. Whether you are organizing a tennis tournament, an awards banquet, a luncheon, or a holiday party, the information you need is kept in one package. From prices and expenses to adding participants, all event information is stored in the same place.

✔ Membership Management

Membership Management helps you track multiple memberships, produce reports to analyze membership activity, and print lists and directories of members. You can also perform additional mailing functions, such as creating membership cards and dropping members who haven't responded to notices about renewing their memberships.

✔ NetSolutions

NetSolutions helps you raise money online. It is comprised of a number of components working together, connecting you electronically with your constituents. All of these components rely on services hosted by Blackbaud. We maintain the servers, host the *NetSolutions* web pages, and collect the constituent data entered from these Web pages.

The *NetSolutions* components include the following:

- NetDonors - Accept online donations.

- NetMail - Create and track e-mail messages, using fields from **The Raiser's Edge**.

- NetEvents - Publicize and allow online registration for upcoming events.

- NetDirectories - On a web page, create and publish alumni, professional, and constituent directories or a donor recognition page, using data from your *Raiser's Edge* database.

- NetVolunteers - On your website, publicize volunteer opportunities, create an online volunteer registration form, and create a web page for specific volunteer jobs, all using the job information entered in *The Raiser's Edge* database.

- NetMembers - Design a membership web page and solicit for new members online with NetDonors for Online Fundraising.

✔ Queue for Task Scheduling

With *Queue for Task Scheduling*, you can set up a series of tasks to run automatically and unattended. These tasks make up a queue. With this module, you line up or "queue" the data to run at a specific time. You can set up and run queues when you have large amounts of data to export, print, commit, or send as e-mail. Because you create queues to work with large amounts of data, you can schedule the queue to run during a break in the day or when all your volunteers and employees have left for the day.

✔ Prospect Research

Prospect Research gives you with additional tools to track financial information about prospects and potential donors. You can also import this information directly from Target Analytics Services.

✔ Honor/Memorial Tracking

Honor/Memorial Tracking helps you work with your honor/memorial records in *The Raiser's Edge*. You can access tribute information from the Honor/Memorial tab of a constituent record. On the Honor/Memorial tab, you can track information about donations given in honor, celebration, or memory of an individual or organization.

✔ VBA for Advanced Customization

VBA for Advanced Customization allows you to "tweak" *The Raiser's Edge* to mirror your organization's policies and procedures. For example, use *VBA for Advanced Customization* to create your own business rules, design custom screens, and integrate with Microsoft *Office* software.

✓ Volunteer Management

Volunteer Management helps you to track information about your volunteers. You can maintain online time sheets, keep up with volunteer hours, create assignments, and track volunteer qualifications. This module also provides you with additional reports to evaluate the performance of your volunteers.

✓ RE:Anywhere

RE:Anywhere is a useful tool for decentralized organizations. If your organization has staff members who work across the street, on the other side of town, or in another city, *RE:Anywhere* can help you bridge the information gap. When used over the Internet or an intranet, *RE:Anywhere* can reduce the time your MIS staff spends installing updates and maintaining workstations because the only software required on a user's computer is a Web browser — all processing is done on the server.

✓ Blackbaud NetCommunity Integration

With *Blackbaud NetCommunity Integration*, you can exchange information between *Blackbaud NetCommunity* and *The Raiser's Edge*. Blackbaud NetCommunity is a complete website management solution that enables your organization to create an interactive online environment for your constituents. When you integrate the two programs, you can download online transactions and information about your website users to *The Raiser's Edge*. On your constituent records, you can easily view information about your constituents' online activity on your website.

✓ PlannedGiftTracker

With *PlannedGiftTracker*, you can create gift records for your organization's planned giving, including information specific to numerous types of planned gift vehicles. You can record both the initial gift value and the gift's remainder value, store basic payout information for applicable gift vehicles, and keep track of multiple beneficiaries and relationships for a planned gift.

In addition to fundraising software, Blackbaud offers accounting and education software to meet your organization's needs. For example, *The Financial Edge* integrates with *The Raiser's Edge* allowing you to communicate between your development and business offices. This communication and integration provide many benefits that can help your organization improve productivity, accuracy, and accountability.

Education Administration is an integrated school administration software suite for the admissions and registrar's offices of independent schools. Education Administration enables you to organize your admissions process, store detailed student information, create schedules, produce demographic, statistic and analytical reports, print report cards and transcripts, and much more. You can also offer parents the ability to view student grades, attendance and conduct information securely over the Internet.

To find out more information about other Blackbaud products and services in addition to *The Raiser's Edge*, visit the Blackbaud website at www.blackbaud.com.

You've Got Me Sold!

Once you've established exactly what you need, or if you simply want to discuss these additional products with a Blackbaud representative, refer to the list below:

✔ **Blackbaud's Corporate Headquarters**

Blackbaud, Inc.

2000 Daniel Island Drive

Charleston, SC 29492-7541

www.blackbaud.com

Contacting Support

To create a case online, select Support, Case Central from the menu bar on our website at www.blackbaud.com.

Phone (USA): 1.800.468.8996 option 1

Phone (Canada): 1.877.255.2221 option 1

Phone (International): 001.843.216.3372

Fax: 1.843.216.6100

For more information, review the *Customer Support Guide*. To view the guide, select **Support** on our website at www.blackbaud.com.

Everything You Need to Know, and Then Some

> "A person's true wealth is the good he or she does in the world."
>
> - Mohammed

In This Chapter...

▶ *Who is Blackbaud?*

▶ *Blackbaud's Corporate Headquarters*

You may be asking, what now? Now that you have seen the ins and outs of fundraising through the eyes of *The Raiser's Edge*, you probably have a few (hundred) questions. The capabilities of this software are endless. In addition to providing the tools you need to build stronger relationships with constituents and analyze the effectiveness of your fundraising, *The Raiser's Edge* offers Web access to the database, customization options, an entire suite of e-philanthropy tools, and optional modules to meet specific needs.

To find out exactly what you need to know, use the sections below to help you determine the best place to direct your questions.

Who is Blackbaud?

Since 1981, Blackbaud has been providing tools and expertise to help nonprofits operate more efficiently and better manage their financial, fundraising, and administrative operations.

We do this by offering state-of-the-art software, services, and e-solutions designed specifically for nonprofits. Blackbaud is the leader in bringing technology to nonprofit organizations.

If you want to know a bit more about *The Raiser's Edge* and the additional products that work with the software, check out the following section.

Blackbaud Corporate Headquarters

✔ **Blackbaud's Website**

www.blackbaud.com

✔ **Products and Services**

solutions@blackbaud.com

✔ **Sales Seminars and Trade Shows**

marketing@blackbaud.com

✔ **Blackbaud's International Conference on Philanthropy**

conference@blackbaud.com

✔ **Request training information**

Request training information for BBU (Blackbaud University). Blackbaud provides numerous training classes for *The Raiser's Edge*, converting from existing versions, as well as additional classes about optional modules you want to learn how to use.

These classes are designed to help you get the most out of your nonprofit software. Training classes are held at Blackbaud's headquarters in Charleston, SC, on-site at your organization, and even regionally. An online learning network as well as CBTs are available to help you get started with your software.

bbu@blackbaud.com

Sales

The Sales team can help you get started with purchasing *The Raiser's Edge*!

1.800.443.9441

Support

Customer support is available once you purchase *The Raiser's Edge*. Use the contact information below to help direct your questions or suggestions.

To create a case online, select **Support**, **Case Central** from the menu bar on our website at www.blackbaud.com.

Phone (USA): 1.800.468.8996 option 1

Phone (Canada): 1.877.255.2221 option 1

Phone (International): 001.843.216.3372

Fax: 1.843.216.6100

For more information, review the *Customer Support Guide*. To view the guide, select **Support** on our website at www.blackbaud.com.

Knowledgebase

For answers to "How To" questions and steps to resolve issues and error messages, turn to Knowledgebase, which is updated with new solutions each day. Support analysts record every question they are asked and the answers they provide in Knowledgebase. If your question has been asked before, you can find the answer here. To access Knowledgebase, select it from the **Support** menu on our website.

Support Forums

The forums are a gathering place for everyone in the nonprofit community to exchange ideas. If you have a question about best practices or have discovered a creative use for *The Raiser's Edge*, take advantage of this opportunity to share your knowledge and brainstorm with others. The forums also contain documents shared by other users, including policies and procedures manuals, database request forms, and sample letters. To access the forums, select it from the **Support** menu on our website at www.blackbaud.com, or visit http://forums.blackbaud.com.

Documentation

Documentation for *The Raiser's Edge* is available in many forms. Check out the sections below to find which form best fits your needs.

✓ **Help File**

While you work in *The Raiser's Edge*, you can press **F1** on your keyboard or select **Help**, **Raiser's Edge Help topics** from the menu bar to open the help file. To find specific information about a process or function, type the keywords in the search field.

✓ *User Guides*

The user guides contain step-by-step instructions and in-depth explanations for using *The Raiser's Edge*. To access the user guides, which open in Adobe *Acrobat Reader*, select **Help**, **User Guides** from the menu bar in *The Raiser's Edge*, or select **Support**, **User Guides** from the menu bar on our website. For help selecting which user guide best suits your needs, see *Which Guides Should I Read* in the **Getting Started** section. Use the following table to find out the right guide that corresponds with your interests and needs.

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Alumni	Alumni Data Entry Guide, Constituent Data Entry Guide
Auctions	AuctionMaestro Pro Integration Guide, Event Management Data Entry Guide
Campaign planning	Campaigns, Funds, & Appeals Data Entry Guide; Prospect Data Entry Guide; Event Management Data Entry Guide; Mail Guide; Mapping Guide
Converting from *GiftMaker Pro* to *The Raiser's Edge*	GiftMaker Pro Pre-Conversion Planning Guide; GiftMaker Pro Conversion Guide
Converting from *The Raiser's Edge* 6.x to 7.x	Conversion Planning Guide, Conversion Guide
Database administration	Installation Guide; Program Basics Guide; Configuration & Security Guide; Database Administration Guide; Import Guide; Conversion Guide; Global Add, Delete, & Change Guide; Regular Supporters Implementation Guide; AuctionMaestro Pro Integration Guide; GiftMaker Pro Pre-Conversion Planning Guide; GiftMaker Pro Conversion Guide
Development Directors, Executives, or need high-level overview of program	Dashboard Guide, Sample Reports Guide, Planned Gift Tracking Guide, Mapping Guide, Custom View Guide

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Donor biographical data entry	Constituent Data Entry Guide; Batch Guide; Program Basics Guide; Custom View Guide; Global Add, Delete, & Change Guide, Data Health Center Guide
Events	Event Management Data Entry Guide, Volunteers & Jobs Data Entry Guide, Mail Guide, Event Gifts Guide
Exporting data	Query & Export Guide, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide
Extracting or analyzing information from the database, Solicitations, Prospect Management	Query & Export Guide, Dashboard Guide, Reports Guide, Summaries Guide, Blackbaud Analytics Guide, Constituent Data Entry Guide, Prospect Data Entry Guide, Queue for Task Scheduling Guide, Custom View Guide, Regular Supporters Implementation Guide, Mapping Guide
Gift entry	Gift Records Guide; Batch Guide; MatchFinder Guide; Electronic Funds Transfer (EFT) Guide; Event Gifts Guide; Membership Gifts Guide; Tribute Gifts Guide; Proposal Gifts Guide; Regular Supporters Implementation Guide; Planned Gift Tracking Guide; CounterPoint SQL Integration Guide; Global Add, Delete, & Change Guide; AuctionMaestro Pro Integration Guide; Workplace Giving Guide
Importing data	Import Guide, Import Tutorial, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide
Installing *RE:Anywhere for Remote Access*	RE:Anywhere for Remote Access Installation Guide
Installing *The Raiser's Edge* with *Oracle* or maintaining an *Oracle* database	Oracle Installation & Administrator's Guide
IT & Security	Installation Guide, Configuration & Security Guide, Conversion Planning Guide, Conversion Guide, Database Administration Guide

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Mail merging, Creating custom forms	The Raiser's Edge & Microsoft Office Integration Guide, Mail Guide
Mailings	Mail Guide, Data Health Center Guide, Queue for Task Scheduling Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide
Mailing donors letters	Mail Guide, The Raiser's Edge & Microsoft Office Integration Guide
Marketing & Communications	Mail Guide, Constituent Data Entry Guide, Reports Guide, Summaries Guide, Mapping Guide
Membership	Membership Data Entry Guide; Membership Scanning Guide; Mail Guide, Membership Gifts Guide; CounterPoint SQL Integration Guide; Global Add, Delete, & Change Guide
Membership card scanning	Membership Scanning Guide, Membership Data Entry Guide
Online campaigns, donations, marketing, events, Web site	NetSolutions Guide
Phonathons	Mail Guide, Batch Guide
Planned Giving Directors	Planned Gift Tracking Guide
Posting to *General Ledger*	Gift Records Guide, The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits
Receipting	Mail Guide

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Reporting	Reports Guide, Sample Reports Guide, Summaries Guide, Queue for Task Scheduling Guide, Creating Custom Crystal Reports Tutorial, Dashboard Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide, Workplace Giving Guide
Tributes & Honor/Memorials	Tribute Data Entry Guide, Tribute Gifts Guide, Constituent Data Entry Guide
Volunteers	Volunteers & Jobs Data Entry Guide; Global Add, Delete, & Change Guide; Event Management Data Entry Guide
Writing code to customize *The Raiser's Edge*	API Essentials Guide, VBA Essentials Guide

✔ *Comments about user guides and help file*

documentationcomments@blackbaud.com

✔ *Purchase printed manuals*

manualrequest@blackbaud.com

Offer Feedback?

If you are a current *The Raiser's Edge* user and would like to offer feedback about the services and products you are using, contact us:

✔ *Comment about Blackbaud products and services*

feedback@blackbaud.com

✔ *Submit article ideas for The User's Edge, our monthly customer newsletter*

usersedge@blackbaud.com

✓ *Add comments to The User's Edge blog*

http://forums.blackbaud.com/blogs/raisersedge/default.aspx

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