Raiser’s Edge Online User Clinic:
Batching in RE7 & PCI Compliance
Thursday – March 18, 2010

Blackbaud Representative:
William Jankins – Senior RE Solutions Engineer/ Product Expert
Agenda

- Welcome and Introductions
- Blackbaud News and Updates: PCI Compliance/BBPS
- *Batching in the Raiser’s Edge* Presentation
- How Blackbaud Can Help
- Q & A
- Thank You!
PCI Compliance

What is PCI and PA-DSS?
Payment Card Industry and Payment Application Data Security Standard. PCI is the umbrella that covers all aspects of an organization (hardware, software, network, firewalls, processes) while PA-DSS covers software applications that store or process credit cards.

- **RE 7.91** has been certified as a PA-DSS – compliant application
- **Blackbaud’s Payment Service (BBPS)** has been certified as PCI DSS – compliant service
- The **Blackbaud OnDemand** environment (included RE version 7.91) has passed its PCI DSS audit and has received final acknowledgement from the PCI Security Standards Council (SSC)
Blackbaud News and Updates

**PCI Compliance**

- To learn more about PCI Compliance, visit us at:
  - [Blackbaud.com PCI Website](Blackbaud.com_PCI_Website)
  - [PCI Blog](PCI_Blog)
  - [PCI FAQs](PCI_FAQs)
  - [Blog on Exporting/Printing CC#s](Blog_on_Exporting_Printing_CC#s)
What is the BBPS?
This is where credit card data and merchant account information will be stored when upgrading to version 7.91 or higher for CC processing via RE7 Batch. IATS or ICVerify 4.0.3 SP2 is required for use with BBPS. Also, an active Internet connection is required to use BBPS.

When I upgrade to version 7.91 what will happen to my credit card numbers?
Full credit card numbers will be transferred to the BBPS. After upgrading the card number will appear as truncated, meaning you will see 12 asterisks followed by the last 4 digits.

To see a demo of the update to 7.91, the PA – DSS/PCI compliant version of RE7, please visit the following link (Processing payments via the BBPS service is also demoed here):


For additional Information on the BBPS Service:

BBPS Overview
Using RE: Batch More Effectively in RE7

Hosted by: William Jankins
Solutions Engineer/ Product Expert
1. Resources
2. What is RE: Batch?
3. Batch Options: User Options
4. Batch Options: Configuration
5. Batch Setup - Headers
6. Batch Setup - Fields
7. Batch Setup - Defaults
8. Batch Setup – Color Legends
9. Data Entry – Constituent Window
10. Data Entry – Default Row
11. Data Entry – Group Add
12. Data Entry - Gifts
13. Miscellaneous Batch Tools
14. Committing the Batch
15. Batch Specific Reports
16. EFT Processing
1. **Resources:**

**1. User Guides** are accessed from within the software by selecting Help, User Guides:

- **Batch Guide** – step by step instructions with real-life examples on how to effectively utilize this module. These guides are useful when you need in-depth information about a specific area of the program. You can view guides on your computer, or you can print selected pages or entire guides.

- **Batch Quick Reference** - The Batch Quick Reference sheet lists function keys, general shortcut keys, and Batch shortcut keys that will assist you in entering information in Batch quickly and efficiently.

**2. Help Files** are designed to give you quick answers; it contains a table of contents, index, and search features that enable you to find information about all areas of *The Raiser’s Edge* from a single location. To access the help file:

- Click **Help** in the Raiser’s Edge bar and select **Help Topics**
- Select Help, The Raiser’s Edge Help Topics from the menu bar
- You can also access the most recent pdfs of the user guides from [www.blackbaud.com](http://www.blackbaud.com). Click **Support, Documentation, User Guides**.
2. What is RE: Batch?

- Batch is an alternative method for adding constituents, gifts, or (if you have the optional module RE: Volunteer) timesheets to your database. The data entry form closely resembles an excel spreadsheet.

Why use batch?

- With RE: Batch, you can enter and in some cases update information on constituent and gift records quickly because you do not need to open each individual gift or constituent record to add or update information.

Batch Types

- Constituent
- Gift
- Time Sheets (with RE: Volunteer only)
3. Batch Options – *User Options:

- Auto-save the batch! – Don’t lose your work!
- Establish Name display formats
- Auto-advance when doing data-entry via a scanner!
- Establish Validation Report Format
- Default Row Options
- Establish Name Display Formats

*User options are found by going to the main menu bar and selecting Tools, User Options
4. Batch Options –
*Configuration:

- Auto-assign Batch Numbers

- Be warned when a constituent has outstanding pledges, registration fees, etc.

- Enable Credit Card Processing via Blackbaud Merchant Services, IATS, and CyberSource, or contact a Blackbaud representative toll free at 866-546-8372, IATS at 866-300-4287 or CyberSource at 800-530-9095

*Config Batch options are found by going to the menu bar items and selecting Config, Business Rules
5. Batch Setup – Batch Headers:

- Validation starts here!
- Auto-display to speed up data-entry!
- Recurring Batches
- Bank Deposits
- Security
6. Batch Setup - Fields:

- Pick the fields you will use for data entry
- Some fields require others (i.e. credit card number)
- Arrange and order the fields for data-entry
- Load them from an existing batch
- Can always return to add or remove fields by clicking the batch design button when within the batch:
7. Batch Setup - Using Defaults:

- Speed up data entry
- Establish fields that always have the same value
- Optionally hide fields that always have the same information
- Data added here will be automatically added for each record!
8. Batch Setup – Color Legends:

- Identify data more quickly and easily
- Reduce or eliminate data-entry mistakes
- Differentiate between various gift types via color schemes
- Confirm visually that the gift is properly linked, matched, or soft-credited

To edit the color legend, while in an open batch, select View, Legend from the menu bar
9. Data Entry – *Constituent Window:

- Edit Constituent Records while working on a Gift Batch
  - Allows updating of records while adding gifts
  - Confirm that data on file is correct w/out exiting the batch
  - Changes are saved immediately, even before the batch is posted!

*To see the Constituent Window, select View, Constituent Window from the menu bar of the open Batch.*

*To define the fields used in the window, select Constituent, Define Constituent Fields from the menu bar.*
10. Data Entry - Another way to use defaults - the Default Row:

- Another way to utilize defaults
- Follows the data entry methods defined in User Options
- Data entry can occur one of three ways: by row focus, by field focus, or by pressing **F2** & the **tab** key is your friend!
11. Data Entry – Group adding constituents:

- Add an entire query of people to batch for gift entry
- Saves time and speeds up data-entry
- Must be based upon a query

To group add donors by query, select Tools, Group add constituents to batch from the menu bar.
12. Data Entry – Gifts

- Matching Gifts
- Tributes
- Soft Credits
- Split Gifts
- Benefits (Gift, Benefits)
- Solicitors (Gift, Solicitors)
- Installment Schedules
- Adding Payments to Pledges (Gift, Add payment to pledge) in same batch
- Applying to Pledges and Recurring Gifts (EFT Only for Recurring Gifts)
- Linking to Memberships (RE: Membership only), Events (RE: Event only), & Proposals (RE: Search Only)
13. Miscellaneous Batch Tools

- **Goto** – allows you to jump directly into a constituent’s full record from batch
  - or, select Gift, Goto from the menu bar

- **Batch Validation** – the validation process will compare the projected totals (entered during the headers setup) to the running totals, as well as confirm that each row in the batch can be committed without error
  - or, select Tools, Validate from the menu bar

- **Duplicate Searches** – used to verify that there are no duplicates within the batch itself (does not check main database for duplicates)
  - or, select Constituent, Duplicate search for Batch
14. Committing the Batch

- Begins by click the Commit Batch button:
  - Validate
  - Create a gift query of committed gifts
  - Create a Control Report
  - Automatically delete batch after committing
  - Auto-apply gifts to outstanding pledges and recurring gifts (optionally by fund)
  - Handle overpayments automatically
15. Batch Specific Reports

- **Entry Log** – lists information for all or selected batches in your database. It contains the batch description number, the running number of constituents in a batch, and the status of a batch. To print the report, select File, Print, Batch Log from the menu bar of a gift batch.

- **Deposit Ticket** - select File, Print, Deposit Ticket from the menu bar of a gift batch. When you select to print the Deposit Ticket for a batch, you can select to include or exclude specific batches by clicking the Include button. You can print or preview the deposit ticket for a batch when the Include batch for bank depositing checkbox is marked on the Gift Batch Setup screen.

- **Validation Report** – print to keep a record of all constituents entered in a batch. This report is useful to make sure all the constituent data was correctly entered in the batch. To print the Validation report, select File, Print, Validation Report from the menu bar.

- **Pre-Transmission Report (EFT Only)** - select File, Print, Pre-Transmission Report from the menu bar of a gift batch.

- **Credit Card Report** - select File, Print, Credit Card Report from the menu bar of a gift batch. Specify the batches to include in the report and by what criteria you want to break the report down.

- **Control Report** - includes the constituent name, date, and all other constituent batch fields entered in the batch. You can access the Commit Constituent Batch screen to mark the Create control report checkbox by selecting File, Commit Completed Batch from the menu bar of a batch.
16. Electronic Funds Transfer Processing

- The **RE: EFT** module for the Raiser’s Edge is not required to process Credit Cards and Debit Cards in RE: Batch.
- The **RE: EFT** module is required to run a recurring giving program or to process Direct Debits.
- A Recurring gift is where someone is giving on an ongoing basis (i.e. $100/month for the next twelve months, etc.)
- Direct Debits are drafts against a checking or savings account which is different than processing a credit card or debit card—i.e. these can be automated periodic drafts similar to a monthly car payment which is auto-drafted.
- The **RE: EFT** module provides you with the tools to run and manage a recurring giving program and to conduct EFT bank drafts.
How Blackbaud Can Help

Take advantage of your Support Resources!
Email resupport@blackbaud.com or call 1-800-468-8996!

- Additional modules: multiple module purchases and bundled training.
- Training Services: eLearning library, Distance Learning, and Training Pass
- Consulting Services: Conversion and Consulting services.
- OnDemand: Application hosting services for Blackbaud products.

For more information please contact your account manager.
Questions?

For more information:
Contact your account manager
Phone: 800-443-9441
Email: solutions@blackbaud.com

Thank You for joining us!