

# The Raiser's Edge™

Conversion Planning Guide

**012512**

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# What Is In This Guide?



In the *Conversion Planning Guide*, you can learn the best practices in planning your conversion from **The Raiser's Edge 6.42** to **The Raiser's Edge 7**. Important components of the conversion process are discussed in this guide. You can learn about the following.

- “Time” on page 5
- “Comprehensive Plan” on page 15
- “Hardware” on page 28
- “Services/Training” on page 29
- “Sample Conversion Plan” on page 31
- “New Features” on page 44
- “Differences Between Version 6.42 and Version 7” on page 58
- “How Do I Request The Raiser's Edge 7?” on page 62

## How Do I Use These Guides?

**The Raiser's Edge** user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the **Raiser's Edge** documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

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

**Help File.** In addition to user guides, you can learn about **The Raiser's Edge 7** by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

# Conversion Planning



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Welcome to the latest and greatest in fundraising software — **The Raiser's Edge 7**. Blackbaud spent years developing **The Raiser's Edge 7**, which incorporates hundreds of client suggestions and offers significant enhancements. To make your fundraising efforts easier and more efficient, we designed **The Raiser's Edge 7** with a single interface that encompasses the entire program under one “shell.” Many common practices of **The Raiser's Edge 6.x**, such as *Mail* functions, have been expanded in **The Raiser's Edge 7** to accommodate your growing needs.

Along with hundreds of enhancements and modifications in **The Raiser's Edge 7** come changes for your organization. These changes require time to research and develop your plan for converting. Take the time to establish the plan that best meets your organization's needs. You also may need time to adjust as you get used to the new procedures in the new software.

As we continue to provide you with software solutions using the latest technology, support will end for **The Raiser's Edge 6.x** on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

To help you better prepare your plan for converting to version 7, we established four key success factors for you to consider.

- Time
- Comprehensive plan
- Hardware
- Services/Training

Along with these success factors, the *Conversion Planning Guide* is designed to help you plan your conversion to **The Raiser's Edge 7** and introduce you to critical components of the conversion process. Once you carefully plan the conversion, you can determine when you should request **The Raiser's Edge 7** and begin the conversion. For complete information on the actual conversion, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

Please read all the information in this guide carefully, as it is critical to a successful conversion for your organization.

## Converting and Annual Maintenance

Your current maintenance is not affected by converting to the **The Raiser's Edge 7**. **The Raiser's Edge 7** is provided at no charge to existing clients who have a current maintenance agreement for **The Raiser's Edge 6.42**. If you purchase additional user licenses or optional modules, your maintenance agreement will be modified to include your purchases.

## Other Blackbaud Products

The conversion to **The Raiser's Edge 7** is supported from **The Raiser's Edge 6.42**.

**The Raiser's Edge 7.6** or higher uses the Microsoft SQL Server Desktop Engine (MSDE). For more information about this version of SQL, see the “The Raiser's Edge Engine” on page 44. The Oracle version of **The Raiser's Edge 7** is available. For more information, visit our Web site at [www.blackbaud.com](http://www.blackbaud.com).

## The Financial Edge and Accounting for Nonprofits Version 6.4

*General Ledger for Windows* version 6.4 or higher and *General Ledger 7* in *The Financial Edge* both interface with *The Raiser's Edge*. For more information about *The Financial Edge*, send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

## Education Administration

*Academy Manager* is not supported with *The Raiser's Edge* version 7.71. *The Raiser's Edge 7.71* integrates with *The Education Edge* version 7.5. For more information about the release of *The Education Edge 7.5*, visit [www.blackbaud.com](http://www.blackbaud.com).

## Other Interfaces

*Point of Sale* is an interface for *Microsoft Retail Management System* (formerly called *QuickSell Commerce*). For more information, see "Point of Sale" on page 21.

Clients using Grizzard will need to contact Grizzard before they convert.

## The Raiser's Edge 7 Optional Module Information

*Task Scheduling* automates predefined tasks and has been enhanced for *The Raiser's Edge 7*. *Task Scheduling* in version 7 has many new features, such as sending queues as email, including multiple modules in a queue, and assigning tasks in a queue to different printers.

*Honor/Memorial Tracking* can be used to track detailed information about donations given in honor, memory, or celebration of an individual, as well as an organization in version 7. In addition, you can add a default fund for each tribute and assign a default letter for each acknowledgee.

Once you receive gifts donated by credit card or direct debit, you can process the transactions using *Electronic Funds Transfer*. Electronic funds transfer is a general banking system by which transactions, such as deposits or bill payments, are made electronically from a donor's bank account or credit card to your bank account. In version 7, *Electronic Funds Transfer* processing is done in *Batch*.

*Event Management* helps you manage all aspects of your organization's events. Using *Event Management* in version 7, you can notate the solicitor who convinced each registrant, guest, or sponsor to participate, add new gifts or link existing gifts in your database to pay registration fees, and track additional donations given to an event.

*Volunteer Management* gives you the tools you need to coordinate your volunteer work force. You can now add job records that contain job category, position, start and end date information. You can also match your volunteers with special interests and assign volunteer types, interests, and attributes.

*Membership Scanning* is additional functionality if you use *Membership Management*. You can add photo IDs for cardholders and print membership cards directly from *Membership Scanning* in *The Raiser's Edge 7*.

The Prospect Research Interface, which transfers data to prospect research firms, available with *Prospect Research Management*, is now performed through *Import* in *The Raiser's Edge 7*. If you use this interface to create a data file for a prospect research company or you are awaiting a file from a company, ensure this process is complete before your conversion.

*MatchFinder* helps you identify matching gift companies so you can match employee contributions from individuals who work for those companies. Until you upgrade, you can use the *MatchFinder* database as a separate entity.

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, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets.

We offer an optional address validation subscription service called *AddressAccelerator*. *AddressAccelerator* updates and certifies addresses, qualifying your mailings for the lowest possible postal rates. For more information about addresses, press F1 to access the help file from any screen in *AddressAccelerator*.

**Warning:** *Postal Discounts* for U.S. was standard functionality with **The Raiser's Edge DOS**. This functionality converted to **The Raiser's Edge 6.x**. With version 7, *Postal Discounts* contains many new features and uses a third party provider, Satori Software, to sort your mailings. New features include support for Second Class mailings, Flat mailings, and sack and tray labels. Because *Postal Discounts* contains these new features and works with a third party provider, the module is now an optional module for all clients.

*PostalSaver* for U.S. and *Presortation* for Canada (formerly *MailCenter* for both) sorts your mailings and takes advantage of bulk mail discount rates. Use *PostalSaver* (U.S.) or *Presortation* (Canada) with *AddressAccelerator* to receive the lowest possible postal rates. For more information about sorting U.S. mailings, see the *Mail Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com). For more information about sorting Canada addresses, see the *Presortation Guide for Canada* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

## Time

Before you convert to **The Raiser's Edge 7**, you need to consider the time required to complete the process. We recommend you convert data during a relatively slow time for your organization. You cannot work in your database during the conversion process, so it is important that you schedule the conversion when you do not need to access your database. For example, you do not want to begin the conversion process during a major fundraising event or an important mailing.

The approximate time to run the conversion varies depending on your hardware and the size of your database. The process of modifying your converted data to take advantage of new features can require additional time. It may be beneficial to begin the conversion late in the afternoon and allow it to run overnight.

**Warning:** We always recommend that before proceeding with any update, you make a complete backup of **The Raiser's Edge 6.42** data files. For recommendations about backing up your database, see the *Administrator's Guide* for version 6.x on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

The actual conversion of data is handled by a utility that transfers data from version 6.42 to **The Raiser's Edge 7**. During the conversion, you are asked only for the location of your **Raiser's Edge 6.42** database. Mapping data from **The Raiser's Edge 6.42**, to **The Raiser's Edge 7** is already programmed into the conversion. Therefore, no messages appear in the process asking you to indicate how your data should be converted.

A sample conversion plan is provided at the end of this guide to help you form a timeline to follow for your conversion plan. For more information, see "Sample Conversion Plan" on page 31.

Take time to carefully consider and complete the information in this section before you begin the conversion.

## Pre-Conversion Considerations

### Queries and Exports

**The Raiser's Edge 7** includes new fields, and you can enter or select more than one value in certain fields. Because the results of queries and exports are based specifically on field criteria, queries and exports do not convert from version 6.42. We recommend you print control reports for the queries and exports you use on a regular basis before you begin the conversion process. You can use information in the control reports to recreate the same queries and exports in **The Raiser's Edge 7**.

## Crystal Reports

*Crystal Reports for Blackbaud* is available in two ways. *Crystal Reports Standard* is bundled (free) with **The Raiser's Edge 7**. You can purchase additional licenses of *Crystal Reports Standard*. If your organization wants to report directly from your SQL Server database, you can purchase *Crystal Reports Professional*. For further information about *Crystal* purchasing options, please send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

**The Raiser's Edge 7** uses a different export format. Therefore, *Crystal Reports* created in **The Raiser's Edge 6.x** cannot be used in version 7. We recommend you print an Export Control Report and a Crystal Report Definition report for each report you use on a regular basis.

## User Options

Preferences in **The Raiser's Edge 6.42** include automatic prompts, screen appearances such as tab colors and font settings, and settings for saving information. The Preferences you set up in **The Raiser's Edge 6.42** are called User Options in **The Raiser's Edge 7**. Some Preferences settings appear as User Options, along with additional settings available for you to customize your data entry. User Options are password-based so you can enjoy using your personal settings at any workstation. Preferences in **The Raiser's Edge 6.42** do not convert. Before you convert your data, we recommend you write down your Preferences, so you can enter them as User Options.

## Security Groups

User names and passwords in version 6.x convert to version 7. This means security groups created in **The Raiser's Edge 6.42**, also convert, but because of new security features, you must reestablish the rights for each group. We recommend you write down the rights established for each security group, so you can enter this information in **The Raiser's Edge 7**.

Field level changes and changes in the database structure in version 7 affect certain security options available in version 6.42 once you convert. Special considerations should be made when you recreate your organization's security groups.

## Mail Merge Documents

A mail merge document combines text entered in a word processing application with fields from **The Raiser's Edge**. In **The Raiser's Edge 7**, certain field names are different and many new fields are added. These changes will affect merge documents. Once the conversion is complete, you can create new exports and replace the merge fields in your word processing document with the new fields.

In addition, **The Raiser's Edge 7** features enhanced Microsoft *Word* integration to take you seamlessly through the process of creating the data file in **The Raiser's Edge**, creating the documents in *Word*, and automatically processing the mail merge to create your custom letters. This integrated process is done in just a few time-saving steps and eliminates the risk of missing any steps as you create a mail merge.

## RE:Open

If you use the optional module *RE:Open*, once you convert to **The Raiser's Edge 7**, you must modify all SQL statements using the maintenance option *Read - Only Database Assistance (RODBA)* to account for changes in the database structure.

*RE:Open* has been re-named *Read - Only Database Assistance (RODBA)* in version 7. Using *RODBA*, you can continue to gain supported read only access to your **Raiser's Edge** database. With *RODBA*, you have full access to related support resources, as well as database access, which you can use to issue SQL statements, export data, create import files, and create custom reports without exporting a query. For more information about *RODBA*, send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

## Import

A number of import fields have changed. If you use import files on a regular basis, we recommend you verify the information in these files with the *Import Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

For detailed conversion information, please make sure you read the *Conversion Guide* available with **The Raiser's Edge 7** software on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

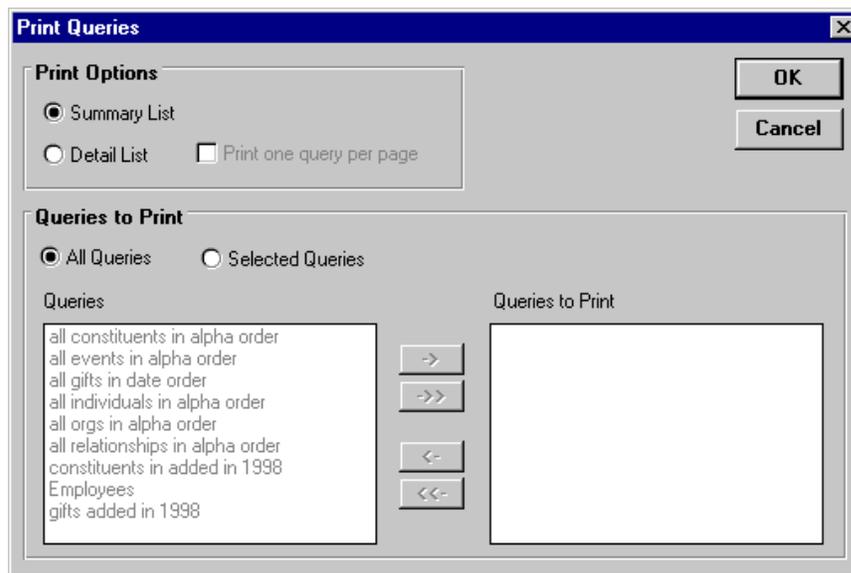
## Printing Control Reports for Queries, Exports, and Crystal Reports

Depending on the number of queries you select and the processing speed of your computer, printing control reports may take some time.

Queries, exports, and *Crystal Reports* in your version 6.42 database do not convert to version 7. You need to print the criteria and output selections of queries, exports, and *Crystal Reports* you use on a regular basis. You can use the information in control reports to easily create the same queries, exports, and reports in version 7.

### ▶ Printing a query control report

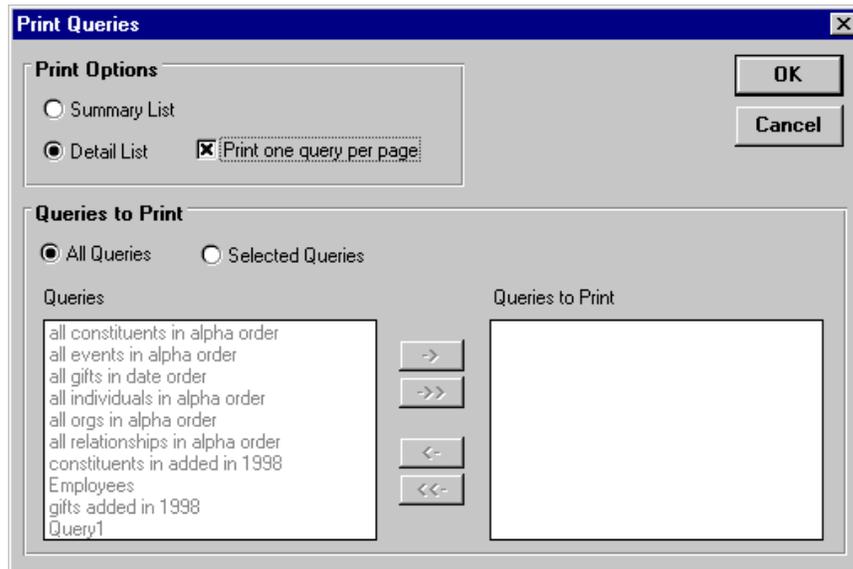
1. From **The Raiser's Edge for Windows** program group, select *RE:Query*.
2. From the menu bar, select **File, Print Queries**. The Print Queries screen appears.



**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

3. From the **Print Options** frame, mark **Detail List**. The **Print one query per page** checkbox is enabled.

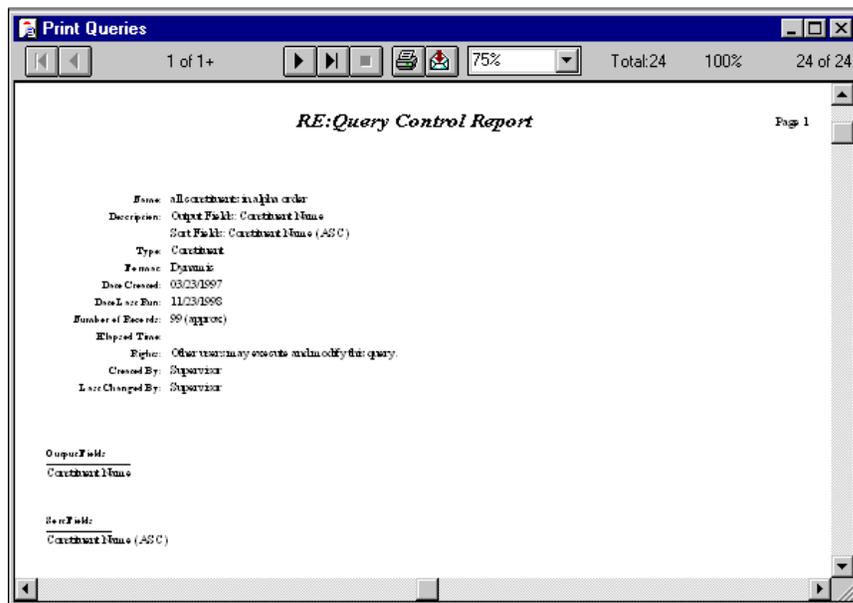
4. Mark the **Print one query per page** checkbox.



5. In the **Queries to Print** frame, mark **All Queries** to print a control report for all queries in your database. Mark **Selected Queries** to print only the queries you want to recreate in version 7.
6. If you mark **Selected Queries**, in the **Queries** box, highlight each query for which you want to print a control report. Use the single right arrow to move the query to the **Queries to Print** box.

The Query Control Report contains important information about the query, including the query name and description, the date created, and the name of the user who created the query.

7. Click **OK**. The control report preview screen appears.



8. Select **File, Print**. A control report containing the criteria, sort, and output selections prints for each query you select.

### ▶ Printing an export control report

For a Constituent export, you can save time by selecting to export one record and using this information to recreate the export in version 7. For Relationship, Gift, or Event exports, the export **One Record** option is not available. You can select a previously created query for the Relationship, Gift, or Event export to limit the number of records exported and save time. If you do not want to use a query, you can select to export all records.

1. From *The Raiser's Edge for Windows* program group, select *RE:Export*.
2. From the menu bar, select **File, Open**. The Open Export screen appears.

3. Select an export from the box on the left.

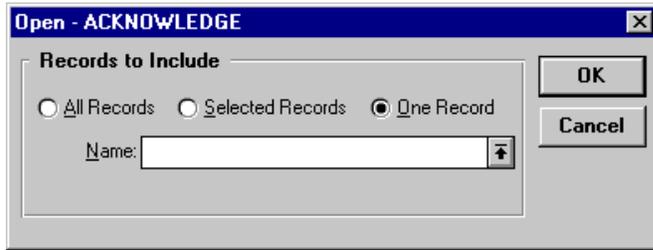
**Tip:** The **One Record** option is not available for Relationship, Gift, or Event exports. You can save time by selecting a query to limit the records included in the export.

4. Click **OK**. The Open screen appears.

**Tip:** We recommend you export one record. If you select multiple records, exporting the records and printing a Control Report can take some time. You can export the information you need to recreate the export in version 7 by selecting one record.

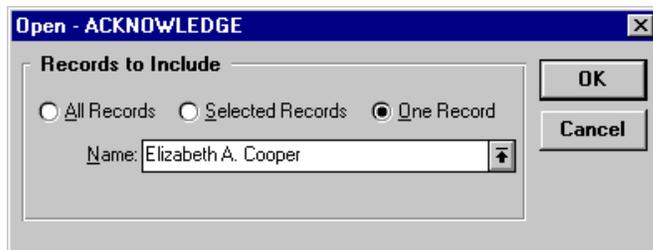
5. Mark **One Record**. By selecting one record, you can quickly export the record and print a Control Report.

6. Click **OK**.

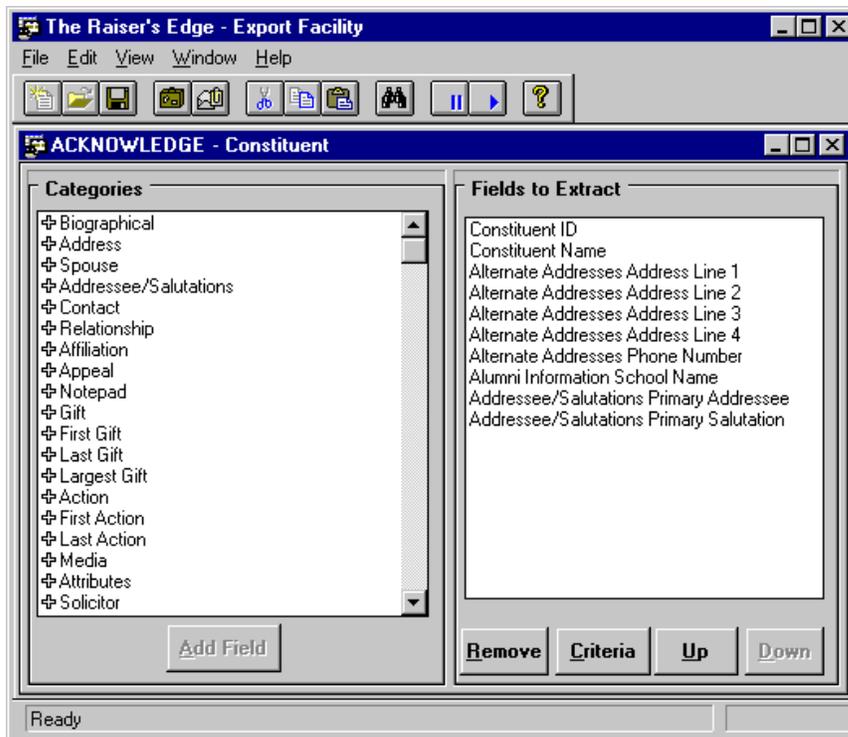


**Note:** If you mark **Selected Records**, you can choose the query of records to export. For Relationship, Gift, and Event exports, you can select to export only **All Records** or **Selected Records**.

7. In the **Name** field, select a constituent name.

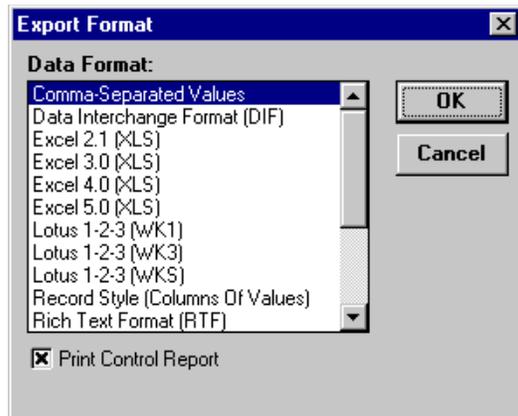


8. Click **OK**. The export screen appears. You can double check the selections in the **Fields to Extract** box to make sure the information you want to print is correct.



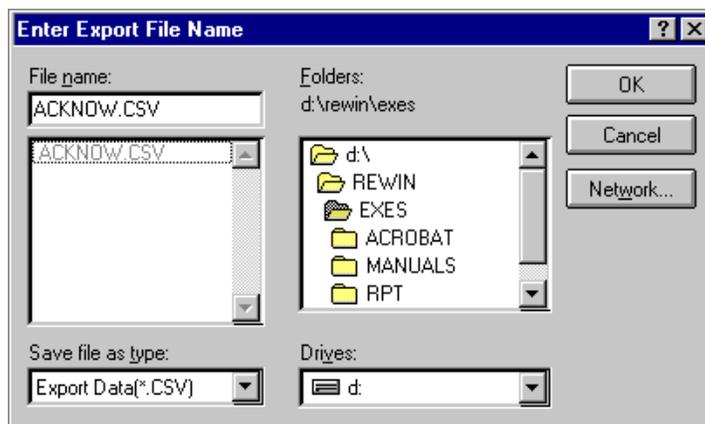
**Note:** This guide is designed to help you plan your conversion to *The Raiser's Edge 7* and introduce you to critical components of the conversion process. For complete information on the conversion process itself, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

- From the menu bar, select **File, Export**. The Export Format screen appears.



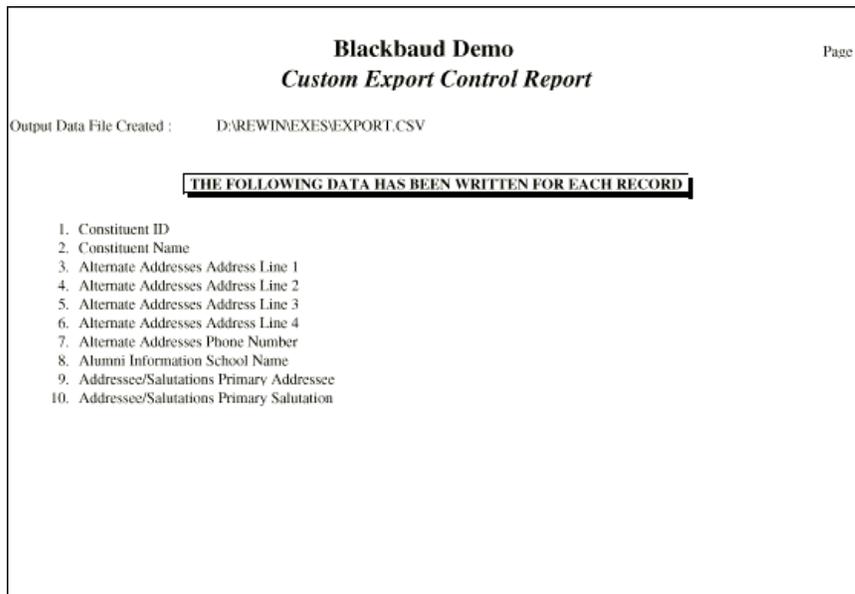
**Note:** To print a control report, you must first export the information.

- In the **Data Format** box, select any format for the exporting file. For example, you can select "Comma-Separated Values".
- Mark the **Print Control Report** checkbox.
- Click **OK**. The Enter Export File Name screen appears.



- In the **File name** field, enter a name for the export file.
- In the **Save file as type** field, use the default file type.
- In the **Drives** field, select the destination drive for the export.
- In the **Folders** box, select the export file location.

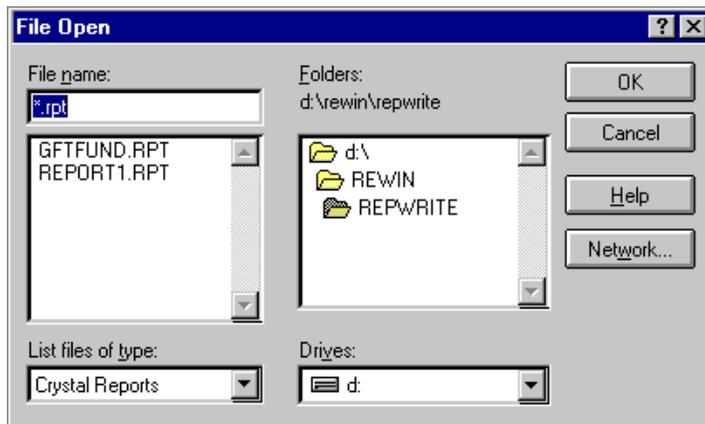
- Click **OK**. The Export Control Report appears. You can print a copy of the report and use the information to create this export in version 7.



### ▶ Printing a Crystal Report Definition

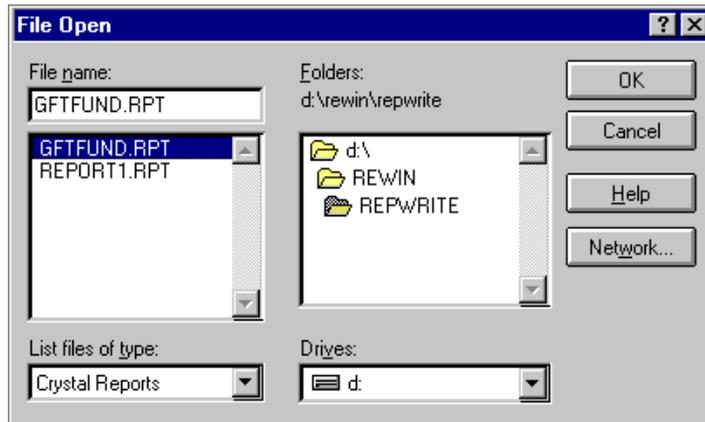
**Warning:** We recommend you print the Export Control Report from *Export* used to create the .mdb file for each *Crystal Report*.

- From *The Raiser's Edge for Windows* program group, select *Crystal Reports for Blackbaud*.
- From the menu bar, select **File, Open**. The File Open screen appears.

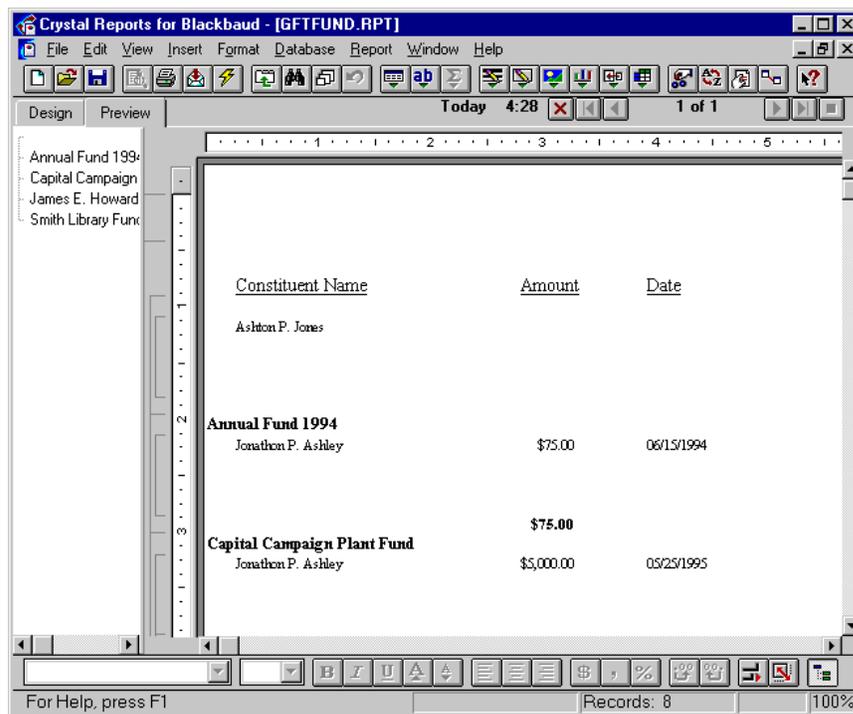


**Note:** The links between the database and reports available in the program have changed in version 7, so you cannot make changes to .rpt files for canned reports. For any custom report needs, use *Crystal Reports*.

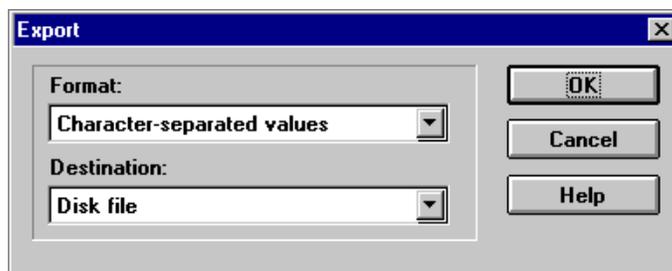
3. In the **File name** box, select a report.



4. Click **OK**. The report preview screen appears.

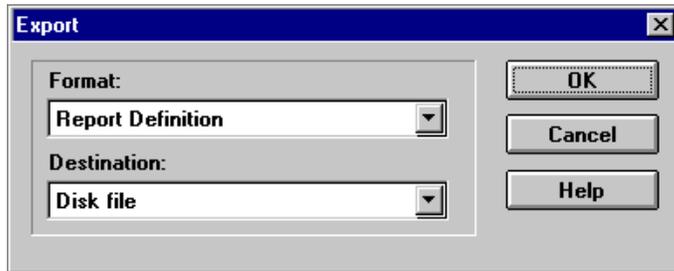


5. From **File** the menu bar, select **Print, Export**. The Export screen appears.

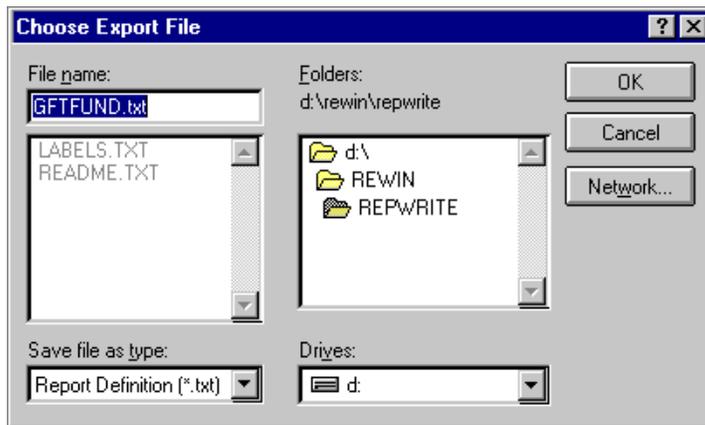


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6. In the **Format** field, select "Report Definition".
7. In the **Destination** field, select the location for your report definition.



8. Click **OK**. The Choose Export File screen appears.



9. In the **File name** box on the left, select your report.
10. Click **OK**. The Crystal Report Definition exports.

## Printing Queries and Reports

You can create and print several queries and *Crystal Reports* in version 6.42 so you can verify the information in your version 7 database once you convert. For example, you can print a query of your organization's board members. When the conversion process completes, you can create the same query in version 7 and compare the information with the query results you printed before converting.

## Committing and Posting Information in Your Database

Before you begin the conversion process, you must commit all uncommitted gift batches in *RE:Batch*. You must also commit all data entry in *RE:Fast* forms. The *RE:Fast* forms in version 6.42 do not convert to *Batch* forms in version 7, so you must post all *RE:Fast* forms before you convert.

Once you begin the conversion process, if the version 6.42 database contains deleted gifts, a message appears:



**Warning:** Remove deleted posted gifts from your database only if you do not use **Post to General Ledger**.

Click **No** to close the message. The deleted posted gifts remain in the database. You can now post the deleted posted gifts to Blackbaud's **General Ledger** and continue with the conversion process. Click **Yes** if you do **not** use Blackbaud's **General Ledger** to remove the deleted posted gifts from your database.

## Comprehensive Plan

The transition from **The Raiser's Edge 6.x** to version **7** is a significant event requiring resource allocation and attention. Like building a home, the most important first step is a solid foundation. By carefully planning and preparing your data for the conversion, you create a strong foundation for your new database. For this reason, you need to take as much time as necessary to make sure your organization is ready to convert to version 7.

Before you convert, take time to thoroughly research and plan for **The Raiser's Edge 7's** new features and functionality. To help you, Blackbaud provides many transition resources such as online support, online training, fundraising consulting, and new classes at Blackbaud University.

During the planning process, you must carefully consider how your organization's data converts to version 7, as well as how your organization can use the program's new features and functionality. By carefully reading and following the directions in this section, you can create a solid foundation for the conversion to **The Raiser's Edge 7**.

## Actions

**Warning:** If you have further questions concerning global change, contact Raiser's Edge Support at [resupport@blackbaud.com](mailto:resupport@blackbaud.com). We always recommend that before proceeding with any global change, you make a complete backup of **The Raiser's Edge 6.42** data files. For recommendations about backing up your database, see the *Administrator's Guide* for version 6.x on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

Version 7 contains the new action field, **Category**. For each action record, you can select one of the following categories: Phone Call, Meeting, Mailing, Email, or Task/Other. The action type selected in the **Action Type** field in your version 6.42 database converts to the **Action type** field in version 7. However, because **Category** is a new field in version 7, all actions entered in version 6.42 convert as **Task/Other** category actions in version 7.

The version 7 **Task/Other** category action record contains all fields found on the version 6.42 action record and more, but the Phone Call, Meeting, Mailing and Email category action records contain different fields. To avoid the loss of any information, all actions entered in your database convert to **Task/Other** category actions in version 7. You can change the category for each action once the conversion completes.

## Alumni School/College Default

The school name you select in the **Alumni School/College** field on the General 1 tab in *Configuration* in version 6.42 does not convert to version 7. Once you complete the conversion process, you can enter a default school name in *Configuration*.

## Blank Address Types

In version 7, **Address Type** is a required field. Once you convert, each address in your database with a blank address type is assigned an address type by the program. The address type assigned to these addresses is determined by the location of the address in your version 6.42 database. For example, an address entered on the Bio 1 tab of a constituent record with no defined address type converts as RE 7 Conversion - Home.

**Note:** If you have duplicate address or addressee/salutation types remaining once you convert to version 7, you can easily replace them using the Table Cleanup utility in *Configuration*. For more information, see version 7's *Configuration & Security Guide*.

Because the **Address Type** field is required in version 7, we recommend that you enter an address type for each address prior to the conversion in version 6.42. If an address type is blank in version 6.42, an address type does automatically default in version 7, but if you enter the address type prior to the conversion, your data is more accurate than the type the program automatically assigns. You can globally add address types in version 6.42 to quicken the process. For more information about global change, see the Globally Change Records chapter of the *Administrator's Guide*.

## Blank Addressee/Salutation Types

For each additional addressee/salutation you enter for a constituent in both version 6.42 and version 7, you must specify an addressee/salutation type. If an addressee or salutation is not associated with a addressee/salutation type in your current database, once you convert, the conversion program assigns an addressee/salutation type. The blank addressee/salutation type converts as RE 7 Conversion xxx, with xxx being the addressee/salutation ID number defined in *Configuration* in version 6.42.

## Blank Spouse Last Name

Information entered on the Spouse tab of a constituent record in version 6.42 converts to a relationship record in version 7. Because the program creates a relationship record for the spouse, **Last name** is a required field in version 7. In version 6.42, you are not required to enter a last name for spouses. During the conversion, if no last name appears on the Spouse tab, the program selects the last name entered on the constituent record associated with the spouse. For example, you enter Robert Hernandez's wife Wendy on the Spouse tab of Robert's constituent record. You leave the **Last name** field on the Spouse tab blank. When you convert to version 7, Wendy's information converts to a relationship record. Because **Last name** is a required field, Hernandez appears in the **Last name** field of Wendy's relationship record because this is the last name entered on Robert's constituent record.

## Credit Card Numbers

For credit card numbers to convert to version 7, you must enter a credit card type in the **Credit Type** field on the Bio 2 tab of constituent records in version 6.42. If your organization enters only a credit card number for constituents, the card number does not convert because in version 7 **Card Type** is a required field.

If you marked the **Validate Credit Card Numbers** checkbox on the *Configuration* Preferences tab, this setting does not convert to version 7. Once you convert, you can select a Business Rules option for credit card validation in *Configuration*.

## Crystal Reports

*Crystal Reports for Blackbaud* is available in two ways. *Crystal Reports Standard* is bundled (free) with **The Raiser's Edge 7**. You can purchase additional licenses of *Crystal Reports Standard*. If your organization wants to report directly from your SQL Server database, you can purchase *Crystal Reports Professional*. For further information about *Crystal* purchasing options, please send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

**Note:** This guide is designed to help you plan your conversion to **The Raiser's Edge 7** and introduce you to critical components of the conversion process. For complete information on the conversion process itself, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

The latest version of **The Raiser's Edge 7** uses *Crystal XI*. The *Crystal Reports* update CD is included with your **Raiser's Edge 7** package. Before installing the version XI of *Crystal Reports*, you must uninstall any earlier versions of software existing on your computer.

In **The Raiser's Edge 7**, certain field names are different and many new fields have been added. In addition, report formats in *Crystal XI* are different from the formats available in **The Raiser's Edge** version 6.42. Therefore, *Crystal Reports* created in version 6.42 are incompatible with version 7.

We recommend you print an Export Control Report and a Crystal Report Definition report for each report you use on a regular basis so you have a copy of the report layout. Once you convert your data, you can create new *Crystal Reports* using the information in the Export Control Report and the Crystal Report Definition report. For information about printing a Crystal Report Definition report, see "Printing Control Reports for Queries, Exports, and Crystal Reports" on page 7.

It is important to remember that because data exports differently from version 7 than version 6.42, the formulas you used in *Crystal 6.0* may change when you recreate them for *Crystal XI*. For example, the formula "if not isnull(City) then xxx" in *Crystal 6.0* does not work in *Crystal XI* because of the way that the data exports. For version 7, the equivalent formula is "if City <=> (is not blank)". For more information, contact Raiser's Edge Support at [resupport@blackbaud.com](mailto:resupport@blackbaud.com).

## Duplicate Addressee/Salutation Types

In version 6.42, if an individual is a contact for an organization, you can enter addressees and salutations for the individual on the contact record. The addressee/salutation types you enter on the contact record are separate from the addressee/salutation types entered on the Addressee/Salutation tab of the individual constituent record. For example, Lane Pembroke, a contact for Autumn Industries, has the addressee/salutation type Informal on both his contact record and his constituent record. Once you convert, all addressee/salutation types entered on the constituent record and the constituent contact record appear in the **Additional Addressees and Salutations** grid of the constituent record. In version 7, you cannot have duplicate addressee/salutation types on a record. Once you convert, the conversion program assigns a number to all duplicate addressee/salutation types. For example, the duplicate addressee/salutation type Informal on Lane's constituent record appears as Informal 02 in the **Additional Addressees and Salutations** grid.

## Duplicate Constituent Criteria

If you change information in the **Individual Duplicate Criteria** grid and the **Organization Duplicate Criteria** grid in *Configuration* in version 6.42, the information does not convert to version 7. Instead, the program default settings appear in the duplicate grids. We recommend you write down the duplicate criteria entered in your current database and enter this information in version 7 once you convert.

## Events

In version 7, you can select specific event record categories: Sporting event, Dinner, Class, or Other. The version 7 **Sporting event** category event record contains all fields found on the version 6.42 event record and more, but the **Dinner**, **Class**, and **Other** category event records contain different fields. To avoid the loss of any information, all events entered in your database convert to sporting events in version 7. You can change the event category for each converted event record once the conversion is complete.

## Event Registrant Seating Information

Registrant seating information in version 6.42 converts as a registrant attribute in version 7. The registrant attributes for seating in version 7 are Registrant Seating Section, Registrant Seating Table, Registrant Seating Row, and Registrant Seating Seat. All registrant attributes are text attributes.

## Field Characteristics

Fields defined as hidden or required in version 6.42 revert to the original settings during the conversion. For example, if the **Ethnicity** field on the constituent record is hidden in your current database, after converting to version 7 the field appears on the constituent record. You must mark the **Hidden** checkbox in the **Field Options** grid in *Configuration* after you convert to hide the **Ethnicity** field in version 7. We recommend you write down fields you want to appear as hidden or required in version 7, so you can recreate these settings once you complete the conversion process. All renamed fields convert to the system-defined field name in version 7. Therefore, if you changed the **Income** field to **Net Worth**, this field reverts to the system-defined field name **Income** during the conversion. Table lookup values convert, but you must mark the **Lookup** checkbox in *Configuration* in version 7 for the field values to display as a lookup table. Click the **Fields** link on the Configuration page to access field characteristics in version 7.

## Gift Type

**Note:** Gift distributions from version 6 do not automatically convert in version 7. To convert gift distributions, contact Raiser's Edge Support at [resupport@blackbaud.com](mailto:resupport@blackbaud.com) to obtain a plug-in designed for this purpose.

The gift types of Cash, Stock/Property, Gift-in-Kind, and Other in version 6.42 convert directly to the **Gift type** field on the Gift tab of a gift record in version 7.

The gift type of Pledge converts directly from version 6.42 to version 7. For pledges with more than 999 installments, the 1000th installment and above do not convert. The sum of all installments for the 1000th installment and above are added to the 999th installment. This total is linked to the same fund that the 999th installment is for.

## Imports

**Warning:** Because version 7 uses different formats for data files, we recommend importing any data files you have in version 6.42 before converting.

In version 7, certain import fields have changed. If you use import files on a regular basis, we recommend you use the *Import Guide* for version 7 on our Web site at [www.blackbaud.com](http://www.blackbaud.com) to verify the information in the import header field is correct.

## International Address Fields

In version 6.42, the database version determines the available address fields. For example, a US database contains address fields specific to the United States. All address fields for a specific version appear for international addresses in the database, even if the fields do not apply to the country selected.

For example, in the US version 6.42 database, the **County** field appears for a New Zealand address. New Zealand addresses do not contain counties, but the United States does use this format. Because the US version of the database contains a **County** field, a New Zealand address in the database will also contain the field even though the address information does not apply to this country.

In version 7, address fields are specific to the country selected on the constituent record address screen. For example, in version 7 a New Zealand address in a US version database has address fields that apply to New Zealand. Information entered in address fields in version 6.42 that does not apply to the specific country converts as an address attribute.

Address fields converted as address attributes vary depending on the country associated with the database and the country selected on the constituent record address screen. Once you convert, you can view address attributes from the constituent record Bio 1 or Org 1 tab, **More** button, and Attributes tab.

## Maiden Name

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

On the version 7 Open screen, the **Check aliases** checkbox replaces the **Check Maiden Name** checkbox. To include maiden names in searches, the maiden name entered in version 6.42 converts to both the **Maiden name** field and the **Aliases** grid on the Bio 1 tab of the constituent record.

## Mail Merge Documents

A mail merge document combines text entered in a word processing application with fields from **The Raiser's Edge**. For example, in *RE:Mail* in version 6.42, you can create a thank-you letter and merge this letter with constituent name and address fields exported from your database. From the **Write** menu in *Constituent Management* and the Letter tab in *Configuration*, you automate mail merges. By using mail merges, you can quickly and easily personalize your organization's mailings.

In **The Raiser's Edge 7**, certain field names have changed and many new fields have been added. In addition, **The Raiser's Edge 7** is designed with *Word* integration to take you seamlessly through the process of creating the data file in **The Raiser's Edge**, creating the documents in *Word*, and automatically processing the mail merge to create your custom letters.

These changes affect merge documents created in version 6.42. Once the conversion is complete, you can create new mail merges and replace the merge fields with new fields and use the new mail merge functionality to write your letters.

## Mailings

You determine the information to include in mailings by applying parameters, which are filters, fields, options, or checkboxes that limit the information included in mailing functions. The parameters you define in version 6.42 do not convert to version 7. Because the conversion process clears old parameters, you have a fresh starting point for creating your organization's mailings. If you frequently use certain parameters, we recommend you write down this information so you can create the same mailings in version 7. In version 7, you can save each set of parameters you define for a mailing as a parameter file.

## Membership Card Name Default

The membership card name default you select from the General 2 tab of *Configuration* in version 6.42 does not convert to version 7. We recommend you write down the membership card default entered in your current database so you can quickly and easily enter this information in version 7. Once you convert, you can select a membership card name default from *Configuration*.

## Membership Fund Defaults

The fund defaults for membership categories you establish on the Membership Cat tab of *Configuration* in version 6.42 do not convert because version 7 does not have a field that specifically corresponds to the **Default Fund** field for membership categories. In version 7, you can enter gift defaults for memberships linked to gifts, including a default fund. Once you convert, you can enter gift defaults for each membership category in version 7.

## Membership Scanning

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

*Membership Scanning* is additional functionality if you use the optional module *Membership Management*. *Membership Scanning* in *The Raiser's Edge 7* offers many new enhancements, including adding photo IDs and printing membership cards directly from *Membership Scanning*.

## NetDonors

In version 7, *NetDonors* is part of the *NetSolutions for Online Fundraising & Communication* program suite. It is accessed through *The Raiser's Edge* shell by selecting *NetSolutions* on the Raiser's Edge bar. After you register for the product, you must complete a number of required fields in the **Configure and Customize** link, also included in *NetSolutions*. This information must then be submitted to Blackbaud by clicking **Submit**. You can then click the **RE:NetDonors** link to customize and post your **RE:NetDonors** page online.

**RE:NetDonors** for version 7 also includes a number of new features. You can accept recurring gifts; allow donors to enter honor/memorial information; change Internet Merchant Account information; and include donor profiling questions, giving level options, and a **Tell a Friend** link on your Web page.

The **Download Transactions** link, also included in *NetSolutions*, downloads donations made through your **RE:NetDonors** page and allows you to commit the information to *The Raiser's Edge* records.

For more information about **RE:NetDonors**, see the *NetDonors* chapter in the *NetSolutions Guide*.

## Organization Name

In version 7, when you enter data in the **Business** button on the Organization Relationship screen, the **Org name** field is required. Version 6.42 did not require you to enter the organization name. For records in version 6.42 with data on this screen and with **Org Name** blank, <None Specified> defaults in the **Org name** field during the conversion to version 7.

## Point of Sale

**Warning:** *Point of Sale 6* is not compatible with **The Raiser's Edge 7**.

*Point of Sale 7* is available with **The Raiser's Edge 7**. Before you upgrade from *Point of Sale 6* to *Point of Sale 7*, you need to process the Update The Raiser's Edge wizard, accessed from the Point of Sale screen to update all records from *Point of Sale 6* to **The Raiser's Edge** version **6.42**.

In addition, you must upgrade to *Microsoft Retail Management System* (formerly called *QuickSell Commerce*) before you can use *Point of Sale 7* in version 7. *Point of Sale 7* has several new features. For example, you can add new customers in *Microsoft Retail Management System* as new constituents in **The Raiser's Edge 7**. There is also an option in the Update the Raiser's Edge wizard that updates email addresses and phone numbers from *Microsoft Retail Management System* to **The Raiser's Edge 7**.

For more information about *Point of Sale* in version 7 and upgrading *Microsoft Retail Management System*, see the *Point of Sale Guide*.

## Preferences

In version 6.42, you can define Preferences, which are specific settings for each workstation. Preferences include automatic prompts, tab colors, font settings, and settings for saving information. Preferences are called User Options in version 7. Some Preferences settings appear as User Options, but many additional settings are available for you to customize your data entry. User Options are password-based so you can use your personal settings at any workstation. Before you convert your data, we recommend you write down your Preferences, so you can enter these as User Options. To access User Options, select **Tools, User Options** from the menu bar.

## Preferred Address

From the More Address Information screen of the constituent record in version 6.42, you can determine where to send mailings for each constituent. You can select to send **All Mail** to one specific address, or you can choose **Selected Mail** and determine the mailings sent to one or more of the available addresses. In version 7, the preferred address appears in the **Preferred Address** frame of the Bio 1 or Org 1 tab of the constituent record. During the conversion process, the program selects a preferred address for each constituent record. The program searches the Home address and Business address entered on the constituent record. If the constituent has a spouse entered on the Spouse tab of the constituent record, the program also searches the Business address entered on the spouse constituent record.

If an address is marked **All Mail**, the program selects this address to appear in the **Preferred Address** frame of the Bio 1 or Org 1 tab in version 7. The program searches the Home, Business, and Spouse Business addresses, in this order. If no address is marked **All Mail**, the program searches these addresses again. The program selects the first address marked as **Selected Mail** to appear in the **Preferred Address** frame of the Bio 1 or Org 1 tab in version 7. If no addresses are marked **All Mail** or **Selected Mail**, the program selects the address entered in the **Home Address** frame of the Bio 1 or Org 1 tab of the constituent record to appear in the **Preferred Address** frame of the Bio 1 or Org 1 tab in version 7. Once the program selects a preferred address, the **Set this address to the preferred address** checkbox on the Address screen is marked in version 7.

## Queries and Exports

*The Raiser's Edge 7* includes new fields, and you can enter or select more than one value in certain fields. Because the results of queries and exports are based specifically on field criteria, queries and exports do not convert. We recommend you print a control report for the queries and exports you use on a regular basis before you begin the conversion process. You can use the information in the control reports to create the same queries and exports in version 7. For information on printing a query control report and an export control report, see "Printing Control Reports for Queries, Exports, and Crystal Reports" on page 7.

## Relationship Education Information

Alumni information for relationships converts to a relationship record in version 7. Because a relationship record is created for the school attended, **School name** is a required field in version 7. In version 6.42, you cannot enter a school name for relationships in the **Alumni Information** frame. If you enter a school name in the **Alumni School/College** field on the General tab in *Configuration*, this information converts to the **School name** field in version 7. If no school name is entered on the *Configuration* General tab, the school name for the Education record in version 7 appears as Conversion None. For example, in version 6.42 you enter Rebecca Aaron's son Benjamin as a relationship. In the **Alumni Information** frame on the relationships screen, you enter Benjamin's education information. No school name is specified in the **Alumni School/College** field on the General tab in *Configuration*. Once you convert, the program creates an Education record for Benjamin's education information from Rebecca's Relationships tab. Because no school was specified in *Configuration*, Conversion None appears in the **School name** field on Benjamin's Education record. You can enter the appropriate school name for education relationship records once you convert.

## Reports

**Note:** The links between the database and reports available in the program have changed in version 7, so you cannot make changes to .rpt files for canned reports. For any custom report needs, use *Crystal Reports*.

You determine the information to include in reports by applying parameters. Parameters are filters, fields, options, or checkboxes that further limit the information included in reports and mailing functions. The parameters you define in version 6.42 do not convert to version 7. Because the conversion process clears old parameters, you have a fresh starting point for creating your organization's reports. If you frequently use certain parameters, we recommend you write down this information so you can create the same reports in version 7.

In version 7, you can save each set of parameters you define for a report as a parameter file. For example, you create a First/Latest/Greatest Gift Report for your organization's Annual Campaign. Next, you create this report for your Capital Campaign. In version 6.42, the program saves only the last defined parameters, so the parameters for the Capital Campaign First/Latest/Greatest Gift Report are available. To run this report for your Annual Campaign, you must select the parameters specific to this campaign again. In version 7, you can save the parameters for both campaigns so you can easily run the First/Latest/Greatest Gift Report without changing the report parameters each time.

## RE:EFT

If you use the optional module *RE:EFT*, you should post all transaction sets before you convert. During the conversion process, EFT records with regular payment schedules convert to recurring gift records in version 7. Once you convert, you can access recurring gift records from the **Gifts** link on the *Records* page in version 7.

Pledge EFT records in version 6.42 convert as Pledge gift records in version 7. During the conversion, the program marks the **EFT?** checkbox in the **Pay method** frame on the Gift tab of the pledge gift record. If the Pledge is linked to a membership, the program updates the membership renewal information on the new Pledge gift record.

EFT payments made in cash convert as Recurring Gift Payment - Cash or Pledge Payment - Cash (depending on the type of EFT gift in version 6.42) in version 7.

EFT records with irregular payment schedules do not convert. You can create a query for EFT records with irregular payment schedules in version 6.42 and select a regular payment schedule for each irregular EFT in the query. Once you select a regular payment schedule, the EFT records convert as recurring gifts in version 7.

EFT records with a frequency schedule of Daily do not convert. During the conversion process, the program searches for EFT records with a daily frequency schedule. If any records are found, you receive a message to delete or change the frequency for these records.

If you have applied Cash EFT payments toward a Pledge in version 6.42, these payments convert as Recurring Gifts payments in version 7. The Cash EFT record converts to a Recurring Gift. These Recurring Gifts are still processed in version 7 when you generate transactions in *Batch*, but you can no longer apply the Recurring Gift payment to the Pledge they reduced in version 6.42. As a result, these pledge balances are not reduced in version 7.

In version 6.42, you can enter additional information about a recurring gift record by clicking **Comments** in the **EFT Status** frame of the Gift tab. These comments convert as gift notepads in version 7. From the Miscellaneous tab of the recurring gift record in version 7, you can select the notepad type RE 7.0 Conversion - EFT Notepad to view this information.

Information entered in the **Notes** field on the Miscellaneous tab of the EFT record in version 6.42 converts as a gift notepad on the corresponding recurring gift record in version 7. From the Miscellaneous tab of the recurring gift record in version 7, you can select the notepad type RE 7.0 Conversion - EFT Notes to view this information.

Matching gift information for EFT records in version 6.42 converts as notepad information on the corresponding recurring gift record in version 7. From the Miscellaneous tab of the recurring gift record in version 7, you can select the notepad type RE 7.0 Conversion - EFT Matching Gift to view this information.

Once you convert, the recurring gift history for converted gifts appears on the Transactions tab of the recurring gift record and the Installments/Payments tab of the recurring pledge gift record. The program bases the information in the gift history for recurring gifts and recurring pledge gifts on the payments made toward each gift. Entries in the gift history are arranged by date. Any scheduled transactions not made in version 6.42 appear in the gift history as Skipped Transactions, so you can easily see payments not made toward a recurring gift.

The Import ID for each EFT record appears as a gift attribute on the Attributes tab of the recurring gift or recurring pledge gift record in version 7. Once you convert, you can use the attribute to locate converted EFT records by creating a query on the attribute using the operator <not blank>.

## RE:Fast

*The Raiser's Edge 7* combines *RE:Fast* and *RE:Batch*. The *RE:Fast* forms in version 6.42 do not convert to *Batch* forms in version 7, so you must post all *RE:Fast* forms before you convert. Once you complete the conversion process, you can easily create new constituent batch entry forms in *Batch*.

## RE:Open

Once you convert to version 7, you must recreate all SQL statements created in version 6.42 using the maintenance option *Read - Only Database Assistance (RODBA)*.

*RE:Open* has been re-named *Read - Only Database Assistance (RODBA)* in version 7. Using *RODBA*, you can continue to gain supported read only access to your *Raiser's Edge* database. With *RODBA*, you have full access to related support resources, as well as database access, which you can use to issue SQL statements, export data, create import files, and create custom reports without exporting a query. For more information about *RODBA*, send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

Because *RODBA* offers you read only access to your database, you may consider taking advantage of two new optional modules: *VBA for Advanced Customization* and *API for Advanced Application Development*. By using *VBA* and *API*, you gain read and write access to data within *The Raiser's Edge 7*, so you can customize programs for your organization. If you are interested in purchasing *API* or *VBA*, please contact your account representative at 1-800-443-9441.

## RE:Profiles

**Warning:** We recommend you include one record in each Profile you print. If you select multiple records, printing may take some time. You can print the information you need to recreate the Profile in version 7 by selecting one record.

Profiles you create in version 6.42 do not convert to version 7. We recommend you print each Profile before you convert. From *RE:Profiles*, select the Profile you want to print. From the menu bar, select **File, Print Preview**. In the **Records to Include** frame, mark **One Record**. From the **Name** field, select a constituent. Click **OK**. The Profile prints. Once you convert, you can use this information to recreate your Profiles. In version 7, you access Profiles from *Reports*.

## RE:Queue

*RE:Queue*, which automates predefined tasks, has been enhanced for *The Raiser's Edge 7*. Now called *Task Scheduling* in version 7, the module has many new features, such as sending queues as email, including multiple modules in a queue, and assigning tasks in a queue to different printers. For more information about *Task Scheduling* in *The Raiser's Edge 7*, see the *Queue for Task Scheduling Guide*.

## RE:Web

*RE:Anywhere for Remote Access*, formerly *RE:Web*, is the Web version of *The Raiser's Edge*. You can use *RE:Anywhere* to access and use the program from virtually anywhere in the world. *The Raiser's Edge 7* does not include *RE:Anywhere*. If you are interested in *RE:Anywhere*, please contact your account representative at 1-800-443-9441.

## School Name Table

In version 6.42, the lookup table value selected in the **School Name** field on the education record has only a long description. In version 7, you can select either a long or short description for **School name** lookup table values. During the conversion, the program assigns a short description to converted school names. The short description contains the first two letters of the school name and a unique number. The program assigns these numbers sequentially. For example, in your current database you have the lookup table value Smith College. In version 7, Smith College converts with a long description, Smith College, and with a short description, Sm32. From the General tab of User Options, you can select a default description, either short or long, for the **School Name** table in version 7.

## Seasonal Dates for Mailing Information

Seasonal dates entered in the **Valid Date range** frame in version 6.42 convert to the **Seasonal Address** frame in version 7. All addresses with the default date range 01/01 - 12/31 appear in the **Seasonal Address** frame in version 7, but the **Seasonal Address** checkbox is not marked. Seasonal dates that contain a date range other than 01/01 - 12/31 appear in the version 7 **Seasonal Address** frame and the **Seasonal Address** checkbox is marked.

## Security Groups

The security groups created in version 6.42 convert, but because of the new security features, the administrator must reestablish the rights for each group. We recommend the administrator write down the rights established for each security group so this information can be entered in version 7.

Field level changes and changes in the database structure in version 7 affect certain security options available in version 6.42 once you convert. Special considerations should be made when you recreate your organization's security groups.

When you reestablish security groups in version 7, there is a difference in system security groups you should keep in mind (such as Security by Fund and Security by Notepad Type). In version 6.42, if a user is a member of two security groups and one of these groups restricts the user from accessing a certain fund or notepad type, but the user has access to this information in the other security group, the least restrictive group takes precedence. In this case, the user would have had access to the fund or notepad type. In version 7, the most restrictive security setting takes precedence, so the user would not have rights to the fund or notepad type.

For information on security groups, see the Security chapter of the *Configuration & Security Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

## Soft Credit Spouses

From the *Configuration* General 2 tab in version 6.42, the **Automatically Soft Credit Spouse** checkbox defaults automatically to marked to soft credit spouses for gifts contributed to your organization. For relationships who are also constituents in your database in version 7, you can globally mark the **Automatically soft credit this individual for gifts** checkbox on the constituent Individual Relationship screen.

## Spouse Address Types

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to *The Raiser's Edge 7*. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

In version 6.42, you can enter only business address information for a spouse from the individual constituent record Spouse tab. In version 7, you can enter additional address information for spouses from the individual constituent record **Spouse** button, including spouse home address and alternate addresses. Because these fields did not exist in version 6.42, during the conversion, the program selects address information from the spouse's constituent record and copies this information to an Individual Relationship record.

For example, Robert and Wendy Samuelson are both constituents in your version 6.42 database. Robert appears on Wendy's Spouse tab and Wendy appears on Robert's Spouse tab. During the conversion, the program copies the home address information, as well as any alternate address information from Wendy's constituent record to the Individual Relationship record generated for Wendy on Robert's constituent record. The same process occurs for Robert's home address and alternate address information. Once the conversion completes, you can view Wendy's home and alternate address information from both her constituent record and from Robert's constituent record **Spouse** button.

## Tables

The table sort order you select in version 6.42 does not convert to version 7. We recommend you print a copy of your tables before converting so you can easily define the table sort order in version 7. From *Configuration*, select the Tables tab. Click **Print**. The Print Code Tables screen appears. Select the Code Tables you want to print and click **OK**. Once you convert, you can check the values in each table in version 7 to make sure the values match those entered in your version 6.42 database.

## User Defaults

Default value settings are predefined values assigned to a field. For example, if the majority of the gifts your organization receives are contributed to a specific campaign, you can select this campaign as the default for the **Campaign** field. The default value settings you established in version 6.42 do not convert to version 7. We recommend you write down the default value settings so you can enter these defaults in version 7.

Once you convert your data to version 7, you can create default sets accessible to all users. A default set is a group of default settings defined for specific information in the program. A default set can contain entries for every field in a record. When you load a default set into a record, the values you enter for the set automatically default into the fields on the record. You can create default sets for several different types of records. If you enter the same value in numerous fields on a record repeatedly, you can create a default set with these values and use it to save time during data entry.

For example, you may create a default set that includes defaults for gift acknowledgement status, post status, and an associated campaign, fund, and appeal. By defining default sets, you can increase the speed of data entry. To create default sets, select **Tools, Organize/Create Defaults** from the menu bar in version 7.

## VSE Survey (Formerly CAE Report)

Formerly called the CAE (Council for Aid to Education) Report in version 6.x, the VSE (Volunteer Support of Education) Survey is available in version 7 if you use the optional module *Alumni Tracking*. For more information about the VSE Survey, see the *Reports Guide*.

## Required Fields

Along with all the new features of *The Raiser's Edge 7* come more required fields. It is important you research these required fields before you convert. We recommend data is present in these required fields in version 6.x. If data is not present, the conversion fills in data for you. For example, in version 6.x, address types are not required. In version 7, they are. If you leave the Address Type field on the Bio 1 tab in version 6.x blank, it converts with the address type RE7 conversion - Home. The following is a partial list of required fields in version 7.

- **Action Date**
- **Category** (Action)
- **Address Type**
- **Last name** (Constituent)
- **School name**
- **Name** (Event)
- **ID** (Event)
- **Information Type** (Financial Information)
- **Account Type** (Financial Relationship)
- **Acknowledge**
- **Amount bills**
- **Fund** (on the gift record)
- **Gift Status**
- **Issuer median price**
- **Pay method**
- **Receipt**
- **Receipt Amount**
- **Sale of stock broker fee**
- **Tribute Type**
- **Name** (Job)
- **Date** (Media)
- **Type** (Media)
- **Category** (Membership Transaction)
- **Date** (Notepad)
- **Type** (Notepad)
- **Invitation**
- **Last name** (Participant)
- **Registration**
- **Name** (Proposal)
- **Category** (Ratings)
- **Date** (Ratings)
- **Date** (Timesheet)
- **Credit Type**

- |                      |                                    |  |
|----------------------|------------------------------------|--|
| • Campaign ID        | • <b>Description</b><br>(Campaign) | • <b>Fund ID</b>   |
| • Description (Fund) | • <b>Appeal ID</b>                 | • <b>Description</b> (Appeal)  |
| • Last name (Spouse) | • <b>Org name</b>                  | • <b>Addressee\Salutation</b><br>and <b>Type</b> (in the<br><b>Additional Addressees</b><br>and <b>Salutations</b> grid) |

## Data Preparation Checklist

Before you convert to version 7, we strongly recommend you carefully read and plan for the following items in the checklist. You can mark each item as you complete the task.

- If you made changes to the information in the **Individual Duplicate Criteria** or the **Organization Duplicate Criteria** grid in *Configuration*, write down this information so you can enter the same duplicate criteria in version 7.
- Print an Export Control Report and a Crystal Report Definition for *Crystal Reports* you use on a regular basis so you can recreate these reports in version 7.
- Write down fields you want to appear as hidden or required in version 7, so you can change the settings once you convert.
- Write down fields you renamed so you can change the system-defined field name in version 7 back to the name you created in version 6.42.
- Write down the membership card name default you selected, so you can enter this default in version 7.
- Write down parameters you defined for reports, so you can create the same reports in version 7.
- Write down parameters you defined for mailings, so you can create the same mailings in version 7.
- Print a copy of each Profile in version 6.42, so you can create the same Profiles in version 7.
- Print a control report for each query you use on a regular basis. You can use the information in the control reports to recreate your queries in version 7.
- Print a control report for each export you use on a regular basis. You can use the information in the control reports to recreate your exports in version 7.
- If you use the optional module *RE:EFT*, post all transaction sets before converting.
- If you use the optional module *RE:EFT*, create a query for EFT records with irregular payment schedules. Select a regular payment schedule for each irregular EFT in the query, so the EFT records convert as recurring gifts in version 7.
- Commit all *RE:Fast* forms before converting.
- Post all unposted gift batches in *RE:Batch* before converting.
- If you receive a message during the conversion stating the database contains deleted posted gifts, post the deleted posted gifts to **General Ledger**. If you do not use Blackbaud's **General Ledger**, this does not apply to you.
- Write down security rights established for each security group so you can enter this information in version 7.
- Print the Code Tables so you can easily enter the proper table sort order in version 7.
- Write down Preferences you created to customize your data entry, so you can easily enter this information in version 7.
- Research the required fields in version 7. Make sure data is present for those fields in version 6.x. If not, the conversion populates them for you. For example, in version 6.x, address types are not required, but they are in version 7. If the **Address Type** field from the Bio 1 tab is blank, it will convert with the address type RE7 conversion - Home. For more information about required fields, see "Required Fields" on page 26.

- Write down default value settings you defined from the **Edit** menu, **Field Characteristics** in version 6.x, so you can enter these defaults once you convert.
- Make sure you have a good, permanent backup of your version 6.42 data before you delete it from the server. This should not be overwritten for at least one year.

## Pre-Conversion: What To Expect

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

Once you complete the items listed in the "Data Preparation Checklist" on page 27, you can begin to plan and prepare your database for the conversion. Read the following pre-conversion items so you have an idea of what to expect. Complete details are available in the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

You will need to:

- Inform all users to exit *The Raiser's Edge* database.
- Make a complete, valid backup of your version 6.42 database.
- Determine the amount of free disk space. For information about free disk space, see "Hardware" on page 28. Also, review our System Recommendations on [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, System Recommendations**.
- Copy and save your version 6.42 database to a separate location.
- Exit all *Windows* applications on the workstation where you are installing *The Raiser's Edge 7*.
- Close any virus scan programs.
- Close any screen saver programs.
- Close the Microsoft *Office* toolbar, if present.
- If errors appear in the Database Validation, run the Database Rebuild utility for your 6.42 database.
- Make a second backup of your version 6.42 database once you run the Database Validation utility.
- Stop the Raiser's Edge database engine before you convert to *The Raiser's Edge 7*. If the system is configured for multiple Blackbaud databases, you only need to stop *The Raiser's Edge 6.x* database.
- If you use the network versions of Blackbaud's *General Ledger* or *Education Administration*, start your *General Ledger* or *Education Administration* database before you begin the conversion.

## Hardware

Before beginning the conversion process, we recommend you place a copy of your 6.42 database in a separate location. This location can be another server you plan to use to perform the conversion. We recommend using the copy of the 6.42 database when running the conversion to protect your original database.

During the conversion, the program creates temporary files in the conversion process. For a successful conversion, please use the following to help estimate the disk space you need:

- Disk space for your version 6.42 database.
- Free disk space equivalent to 7 times your version 6.42 database.
- An additional 500 MB *minimum* of free disk space.

For example, if your current database is 200 MB, you need at least 200 MB (the size of the database), plus 1.4 GB (seven times the database size), plus an additional 500 MB of free disk space for a minimum of 1.9 GB available for the conversion process. The recommended available disk space is an estimate only.

If your organization converts multiple databases to *The Raiser's Edge 7*, each database must be converted individually. You must determine the amount of free disk space needed for each database you convert.

For more information on detailed system recommendations, visit our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, System Recommendations**. These recommendations are subject to change, and we strongly recommend you review these frequently on the Web site for the most current information.

## Services/Training

**Note:** Blackbaud also offers online training. For more information, see our Web site at [www.blackbaud.com](http://www.blackbaud.com).

The transition from version 6.x to version 7 is a major conversion to a product that looks and feels totally different. *The Raiser's Edge 7* includes new functionality along with many new and different ways of performing tasks. Even if you have experience with *The Raiser's Edge for DOS* or *The Raiser's Edge* version 6.x, you are risking an inefficient and difficult conversion unless you receive training on *The Raiser's Edge 7*. Clients who receive training more readily reap the full value of their Blackbaud solution. Training is an important component for employee morale and development. It helps employees going through even mild change anxiety feel more confident and capable. Training is an important investment in every aspect of your organization, staff operations, and mission.

**Note:** If you refer a new prospective Blackbaud client, you can receive credit for Blackbaud software and solutions. For more information, see our Web site at [www.blackbaud.com](http://www.blackbaud.com) or call 1-800-443-9441.

Because we understand how important training is, we offer a variety of training options to meet your different needs. You may find either the *The Raiser's Edge 7* Essentials for Version 6 Users class or the *Raiser's Edge 7* eLearning Library to be appropriate for your needs. We also offer several specialized classes on *The Raiser's Edge 7* at Blackbaud and in cities across North America. As an alternative, you can arrange for a Blackbaud trainer to come onsite to your organization to deliver classroom-style or individualized instruction. You may prefer to have a Blackbaud fundraising consultant guide you through the implementation process, discuss your system configuration, and tailor the software to meet your specific needs. For information about the best services and training options for your organization, call your account representative at 1-800-443-9441 or send an email to [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

## Planning Is Key

**Note:** This guide is designed to help you plan your conversion to *The Raiser's Edge 7* and introduce you to critical components of the conversion process. For complete information on the conversion process itself, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

The actual conversion process is simple and easy to perform. However, the success of your conversion depends on how well you prepare your data before converting and how well you organize your data after converting. This section describes four guidelines established to help your organization prepare for a successful and organized conversion. For a successful change to this new software, your organization should thoroughly plan the conversion, taking many aspects into account — from appropriate timing, to hardware, to researching all the new features. Blackbaud strives for continual, open communication with clients in an effort to help facilitate an organization's conversion. By doing so, all goals are met by everyone. We strongly recommend you use these four key questions to shape the outline of your conversion plan and receive the full benefits of the product.

## Is This The Best Time For Your Organization?

Plan your conversion when you and your staff can devote sufficient time to the conversion.

- Allow time for you and your staff to become acclimated to the new system. **The Raiser's Edge 7** is an entirely new product with a new look and feel, significant changes to functionality, and hundreds of new features. Also, some functionality is different from version 6.x.
- Allow time to recreate your version 6.x queries, exports, *Crystal* reports, and *Read - Only Database Assistance* (formerly called *RE:Open*) customizations because these do not convert. You need to modify acknowledgement letters and other mail merge documents, and you may need to make changes to your converted data to take advantage of new features.

## Do You Have a Comprehensive Plan?

- Study this guide, which includes a sample conversion plan. For more information about the plan, see "Sample Conversion Plan" on page 31.

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

- Understand the features that are not currently available in **The Raiser's Edge 7**, and how they may impact your organization.
- Involve and get commitment from all appropriate personnel in your plan. Create a cross-functional conversion team (such as IT, end users, management) with a designated lead and an executive sponsor.
- Allocate a minimum of three days of down time for the conversion itself, and additional time for making adjustments to your converted data. A test conversion can help you determine what changes you want to make to your version 6.x data prior to the actual conversion to maximize the benefits of **The Raiser's Edge 7**.

## Is The Proper Hardware In Place?

- Review the current System Recommendations for **The Raiser's Edge 7** with your IT staff. You can download the most current recommendations from our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, System Recommendations**.

System recommendations are higher for version 7 than for version 6.x. For example, you need Microsoft *Windows 2000* or *Windows XP* workstations because support for *Windows NT* ended on December 31, 2002. Please note that *Windows 95* and *98* are **not** supported. Have your IT staff install hardware upgrades prior to your conversion.

## Have You Had Proper Services/Training?

- All of your staff must be trained on **The Raiser's Edge 7** prior to the conversion, regardless of their level of expertise with version 6.x. The *Raiser's Edge 7 Essentials for Version 6 Users* class helps your staff get the most out of **The Raiser's Edge 7**.

All four key areas are an essential part of your conversion to **The Raiser's Edge 7** and prepare your organization for a successful transition. Blackbaud is ready to assist you with support, services, and training.

# Sample Conversion Plan



To help you get started, below is a sample conversion plan for a fictional organization. Your plan's action items and dates may vary greatly from this fictitious sample, so please do not consider it a strict guideline. It simply serves as a sample timeline to help you outline your conversion plan.

The amount in the percent column is considered to be the percentage complete as of today's date. In this sample plan, today's date is January 31. For example, in the RE6 to RE7 Implementation row below, as of January 31, 50 percent of this task is complete. The conversion plan began on January 1 and the conversion deadline is March 16.

Be aware that the tasks in the sample plan are split into categories, such as Data Preparation and Data Cleanup. Each category of tasks has its own timeline, so there are certain tasks in different categories which should happen simultaneously. For example, in this sample plan, while you are planning your implementation (Implementation category table), you should be ordering new hardware (Hardware and Technical Services category table).

**Organization:** Fictional Society, Charleston, SC

\*Dates are samples only

**Project Start:** January 1

**Today's date:** January 31

**Project Finish:** March 16

## Implementation

Name	% Complete	Start	Finish	Resource(s)	Comments
RE6 to RE7 Implementation	50%	01-Jan	28-Feb	Project team	Team should include decision makers, administrators, data entry personnel, or one person to represent each stakeholder (Development office contact, IT representative, and a project manager who may have dual roles).

## Project Planning

Name	% Complete	Start	Finish	Resource(s)	Comments
Project Planning	75%	01-Jan	28-Feb	Project manager, project team	
Establish project team	100%	02-Jan	02-Jan	Project manager	
Define roles	100%	02-Jan	02-Jan	Project manager	
Kickoff meeting	100%	03-Jan	03-Jan	Project manager, project team	
Discuss benefits and costs of upgrading	100%	03-Jan	03-Jan	Project team	Discussing benefits and costs will be crucial in justifying the resources you devote to this project. Document this information and distribute to department heads and other decision makers so they have full understanding of the project scope.
Request RE7 from Blackbaud	100%	03-Jan	10-Jan	Project manager	
View RE7 Web seminar	100%	03-Jan	10-Jan	Project manager, project team	
Review the Conversion Planning Guide	100%	03-Jan	10-Jan	Project manager, project team	
Create ROI and list of key success factors	100%	03-Jan	10-Jan	Project manager, project team	Return on Investment (ROI) calculations and key factors useful for demonstrating project success.

Name	% Complete	Start	Finish	Resource(s)	Comments
Review System Recommendations at <a href="http://www.blackbaud.com">www.blackbaud.com</a> . From the menu bar, select <b>Support, System Recommendations</b>	100%	03-Jan	05-Jan	IT person, Development office lead	
Review Conversion Guide	100%	03-Jan	05-Jan	IT person, Development office lead	
Review Services/Training needs and options	100%	03-Jan	05-Jan	Development office lead, project manager	
Review Installation Planning Guide and Installation Guide	100%	03-Jan	05-Jan	IT person	
Discuss data conversion plans, cleanup	100%	03-Jan	05-Jan	Development office lead, project manager, Raiser's Edge end-user, conversion manager	If you plan to make significant changes to your data, you may want to contact Blackbaud Professional Services. Otherwise, your data will convert exactly as it is in RE6. Discuss pre-upgrade cleanup now.
Create preliminary project plan timeline	95%	03-Jan	10-Jan	Project Manager, project team	
Status updates to team and stakeholders	40%	03-Jan	16-Mar	Project Manager	
Memo to dept. heads, other members of the organization not in the Development Office	100%	05-Jan	05-Jan	Project Manager	Notify other departments about the project to make sure there are no conflicts with IT resources, systems, or organization-wide initiatives. Also, their buy-in will be essential in maintaining priority of your project.

## Hardware and Technical Services

Name	% Complete	Start	Finish	Resource(s)	Comments
Hardware and Technical Services	90%	05-Jan	31-Jan	IT person	For information about Blackbaud's Technical Services, email <a href="mailto:solutions@blackbaud.com">solutions@blackbaud.com</a> .
Order new hardware	100%	10-Jan	10-Jan	IT person	If applicable. See System Recommendations document at <a href="http://www.blackbaud.com">www.blackbaud.com</a> . From the menu bar, select <b>Support, System Recommendations</b>
Install new server	100%	24-Jan	24-Jan	IT person	
Install new workstations	100%	25-Jan	25-Jan	IT person	
Install software on test server and workstation	100%	26-Jan	26-Jan	IT person	
Run test conversion from RE6	100%	26-Jan	26-Jan	IT person, conversion manager	This can be on a standalone machine for the person who is testing.
Test converted data	35%	29-Jan	23-Feb	Conversion manager, IT contacts	
Backup RE6 data and systems	0%	20-Feb	20-Feb	IT person, development office lead	
Convert live data from RE6	0%	21-Feb	25-Feb	IT person	Weekend as buffer
Install on production server and workstations	0%	21-Feb	25-Feb	IT person	Weekend.

## Services/Training

Name	% Complete	Start	Finish	Resource(s)	Comments
Services/Training	80%	01-Jan	23-Feb	Project manager, Development office lead	Time so that users can come back to a live system. The transition class should be booked at least 1 month ahead; possibly longer if you are booking during peak training from June - September.

<b>Name</b>	<b>% Complete</b>	<b>Start</b>	<b>Finish</b>	<b>Resource(s)</b>	<b>Comments</b>
Determine services/training needs	100%	01-Jan	05-Jan	Project manager, Development office lead	
Schedule services/training for conversion manager	100%	03-Jan	03-Jan	Project manager, conversion manager, Development office lead	Have someone skilled in RE6 trained prior to test conversion and live conversion.
Schedule services/training for end users	100%	10-Jan	10-Jan	Project manager, Development office lead	
Services/Training dates for conversion manager	100%	15-Jan	19-Jan	Conversion manager	
Services/Training dates for end users	0%	19-Feb	23-Feb	End users	

## Data Preparation

Name	% Complete	Start	Finish	Resource(s)	Comments
Data Preparation	0%	29-Jan	02-Feb	Development office lead, conversion manager	
Import mail files (example, AddressFinder)	0%	29-Jan	02-Feb	Development office lead, conversion manager	
Print control reports of reports, exports, and queries	0%	12-Feb	12-Feb	Development office lead, conversion manager	These items need to be recreated after the conversion.
Print key reports for before and after comparison	0%	12-Feb	12-Feb	Development office lead, conversion manager	
Check new required fields in RE7 and enter data in RE6 data	0%	12-Feb	12-Feb	Development office lead, end users	New required fields, such as address type, will be populated for you unless you enter them in RE6 first.

## Data Cleanup

Name	% Complete	Start	Finish	Resource(s)	Comments
Data Cleanup	0%	26-Feb	16-Mar	Development office lead, conversion manager	
Post Conversion Assistant	0%	25-Feb	25-Feb	Development office lead, conversion manager	See Conversion Guide
Set up Configuration, User Options	0%	25-Feb	25-Feb	Development office lead, conversion manager	User options should be set up before data cleanup is done because it affects use of system during cleanup.
Run key reports, compare	0%	26-Feb	09-Mar	Development office lead, conversion manager	
Set up report, export, and queries	0%	26-Feb	02-Mar	Development office lead, conversion manager	
Recreate mail merge documents	0%	26-Feb	02-Mar	End users	
Post Conversion Checklist	0%	25-Feb	26-Feb	Development office lead, conversion manager	See Conversion Guide

## Implementation Sign-off

Name	% Complete	Start	Finish	Resource(s)	Comments
Implementation sign-off	0%	16-Mar	16-Mar	Project team	Gain agreement from all stakeholders that the upgrade and features are adequate for production. If not, revert back to parallel RE6 system or restore backup of RE6 and continue testing of RE7.



# The New Raiser's Edge 7



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# A New Look

A primary goal for *The Raiser's Edge 7* is to improve module management and navigation throughout the program. When you upgrade to *The Raiser's Edge 7*, you have functionality of modules you currently use in *The Raiser's Edge 6.x*, but the overall look of the modules is different.

All modules from *The Raiser's Edge 6.x* have been incorporated into *The Raiser's Edge 7* shell. The shell provides access to all areas of the program with easy to use features, such as **Back** and **Forward** buttons.

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to *The Raiser's Edge 7*. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

With the latest version of *The Raiser's Edge 7*, you are provided with a *Crystal Reports XI* installation CD. Before installing version XI of *Crystal Reports*, you must uninstall any earlier versions of the software existing on your computer. Because *Crystal Reports* is not a Blackbaud product, it is accessed outside the shell.

Below is the shell and an explanation of where each module from *The Raiser's Edge 6.x* is found in *The Raiser's Edge 7*.



Where in The Raiser's Edge 6.x	Where in The Raiser's Edge 7
Campaigns, Funds and Appeals	Records, in the form of campaign, fund, and appeal records
Configuration	Config (Configuration)
Constituent Management	Records, in the form of individual and organization records
Crystal Reports for Blackbaud	Crystal Reports for Blackbaud, accessed separately
Database Administration	Admin (Administration)

Where in The Raiser's Edge 6.x	Where in The Raiser's Edge 7
Electronic Funds Transfer (optional module)	Transactions process in Batch
PostalSaver (optional module for U.S.) This was previously called MailCenter	Mail, PostalSaver tab
RE:Member	Records, in the form of membership records
RE:Batch	Batch
RE:Export	Export
RE:Fast	Batch
RE:Mail	Mail
RE:Profiles	Reports
RE:Query	Query
RE:Reports	Reports
RE:Search (optional module)	Admin (Administration as Import)
RE:Volunteer (optional module)	Records, as a tab on a constituent record or a job record
RE:Event (optional module)	Records, in the form of event records
RE:Queue (optional module)	<b>Queue</b> link on the Admin page
RE:Membership Scanning (optional module)	Scanning
MatchFinder (optional module)	<b>MatchFinder</b> button on the Records page
N/A	Home
N/A	Dashboard
N/A	Plug-Ins

Home, Dashboard, and Plug-ins are new to *The Raiser's Edge 7* and did not exist in version 6.42.

**Home.** Your Home page provides you with a central area from which you can access all areas of the program quickly and easily. You can customize your Home page to display those records and functions that you use most frequently. You can create records and open existing ones directly from your Home page.

**Dashboard.** *Dashboard* provides a quick and efficient overview of information in your database in an organized presentation. With the click of a mouse, you can view a real-time snapshot of your organization's progress on the Dashboard page. *Dashboard* is ideal for Development Directors, Executives, or any user who needs to quickly access data. Because *Dashboard* does not require a complete working knowledge of *The Raiser's Edge*, it is convenient for infrequent users. For more information about Dashboard, see the *Dashboard Guide*.

**Plug-Ins.** The Plug-ins page is an extension of *The Raiser's Edge 7*. Plug-Ins can open the door to a wide range of custom functionality. They can be as simple as an HTML page, a *Microsoft* document, or an interactive spreadsheet. Using the flexible technology of Plug-Ins, you can add custom applications directly into version 7.

## New Optional Modules

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

Specialized optional modules in **The Raiser's Edge 7** allow your organization to enhance an already powerful system. For more information or pricing, please contact our Sales department at 1-800-443-9441. Included in this section are a list of new modules for **The Raiser's Edge 7**. For more information about all optional modules, see the *Program Basics Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

## Planned Gifts Tracking

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, when a planned gift consists of one or more assets, such as stock or property, you can itemize the assets. For more information, see the *Planned Gift Tracking Guide*.

## VBA for Advanced Customization

*VBA for Advanced Customization* allows you to "tweak" **The Raiser's Edge 7** to mirror your organization's policies and procedures. For example, you can use *VBA* to create custom business rules, design custom screens, synchronize **The Raiser's Edge 7** database changes with an internal system, and much more.

## API for Advanced Application Development

You can use *API for Advanced Application Development* to give external programs open access to **The Raiser's Edge 7** data and services. With *API*, your 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 7** or design customized programs that integrate with the system. For example, you can create seamless links from **The Raiser's Edge 7** to software for patient tracking, human resources, ticketing, the Internet and more. Your options are limitless.

## NetSolutions for Online Fundraising & Communication

*NetSolutions for Online Fundraising & Communication* is a comprehensive suite of Web-based services that enables you to extend fundraising activities to the Internet. With *NetSolutions*, you can interact with your constituents through published directories, personalized emails, online donations and memberships, and event registrations. With the Tell a Friend link, online constituents can also enter information about friends or relatives they think maybe interested in your organization. Constituents can even update address information online.

## RE:Anywhere for Remote Access

*RE:Anywhere for Remote Access*, formerly *RE:Web*, is the Web version of **The Raiser's Edge**. You can use *RE:Anywhere* to access and use the program from virtually anywhere in the world. **The Raiser's Edge 7** does not include *RE:Anywhere*. If you are interested in *RE:Anywhere*, please contact your account representative at 1-800-443-9441.

## Fundraising System Consulting

**Note:** If you refer a new prospective Blackbaud client, you can receive credit for Blackbaud software and solutions. For more information, see our Web site at [www.blackbaud.com](http://www.blackbaud.com) or call 1-800-443-9441.

To help you make the most of **The Raiser's Edge 7**, Blackbaud offers fundraising consulting services. Our fundraising consultants are trained to perform software implementations and system audits, as well as special projects. We devise specific transition packages to assist you with the conversion from **The Raiser's Edge**, to **The Raiser's Edge 7**. For more information about these services, please call your account representative at 1-800-443-9441 or visit our Web site at [www.blackbaud.com](http://www.blackbaud.com).

## The Raiser's Edge Engine

**Warning:** Operating MSDE on a *Windows NT 4.0* server is not supported. For more information, visit our Web site at [www.blackbaud.com](http://www.blackbaud.com).

Your version 6.42 database uses the SQL Anywhere engine database, created by Sybase, Inc., to store information. **The Raiser's Edge 7** uses the latest version of SQL database, Microsoft SQL Server Desktop Engine (MSDE). This version of SQL Server works for **Raiser's Edge** databases smaller than 1.8 GB. **The Raiser's Edge 7** installation (for your conversion) process confirms your database size before the software installation begins. If your **Raiser's Edge** database exceeds this limit, the installation terminates. You must purchase and install Microsoft *SQL Server Standard Edition* before continuing with the installation and conversion process.

**Warning:** If your organization has more than 10 *concurrent Raiser's Edge* users, you must purchase and install Microsoft *SQL Server Standard Edition*. If you use **The Financial Edge** and you are running the full version of *SQL Server Standard Edition*, you must attach databases to **The Financial Edge** using the Blackbaud Management Console (BMC). If you do not use the BMC, the databases are not accessible from **The Financial Edge**. For more information, see the *Install Guide*.

The MSDE **Raiser's Edge** database is faster and more efficient than the SQL Anywhere version. For more information on SQL and MSDE, see the *Installation Planning Guide*.

## New Features

**The Raiser's Edge 7** helps you maintain a comprehensive and useful database through new features, functionality, customization options, and module enhancements. Listed below are several of the most popular new features.

- **Central Working Space**—**The Raiser's Edge 7** is contained in one “shell” so you no longer have to open several applications to perform daily functions. You can also place your most frequently used tasks, such as action reminders, Donor Acknowledgement Letters, a query or an export, on the Home page. You can create direct links to these tasks on the Home page or you can organize them in folders. In addition, you can send a constituent letter or email directly from the Home page and store external files (such as an *Excel* file) from **Home**.
- **Enhanced Process Management**—You can now save reports and mailings for future use. In *Query* and *Export*, you can search for fields and specify your favorite fields. Other examples of enhanced process management, are the ability to open records directly from query results, and selecting an “Ask” operator in *Query* that prompts you for your criteria information. Also, fuzzy dates are used throughout **The Raiser's Edge 7** (for example, if you do not know the day and month a constituent was born, but you do know the year, you can enter only the year in the **Birth date** field of the constituent record).
- **ePhilanthropy**—As well as accepting donations online, you can also accept membership applications, volunteer registrations, and event registrations in version 7.
- **Database Archive**—You no longer need to create attributes for deceased or inactive records. In version 7, the constituent record contains inactive and deceased checkboxes. Marking these checkboxes removes the records from queries, mailings, reports, and exports. The deceased constituent business rules enables you to automatically unmark the **Send mail?** checkbox on all the deceased's addresses, make the deceased's spouse a constituent if not one already, and more.
- **More Automation**—Use the **Solicit code** field on the Bio 1 tab to track mailing information (such as One solicitation annually or Do not mail). Solicit codes are easily excluded from mailings. Use Business Rules in *Configuration* to automate manual functions and maintain data integrity and consistency. With *VBA/API*, you can create an unlimited number of automated functions.
- **Easier Reporting and Data Analysis**—Using *Dashboard*, you can view real-time snapshots of your organization's data in just a few short steps on the Dashboard page. New reports and new options in *Reports* simplifies reporting for you; making the need to create *Crystal Report* more uncommon.

- **Accountability**—With a direct link to Blackbaud's *Financial Edge*, you can view exactly where expenses for a certain fund have been allocated. If a donor requests to know where a donation was distributed, print an Accountability Summary to complete the request.
- **Enhanced Gift Processing**—You can now pay multiple pledges with a single installment and pay an installment for another constituent. All gift types can be split by campaign, fund, appeal, or package. In addition, a new gift adjustment feature maintains a clear audit trail for your records.
- **Enhanced Microsoft Integration**—Using the new integration features, you can simplify mail merges in *Word* and create versatile pivot reports using *PivotTables*. In addition, you can also synchronize records with *Outlook* contacts, appointments, and tasks.
- **The Raiser's Edge Enterprise**—A new version of *The Raiser's Edge* (available for the first time with version 7.7) is for large organizations (at least 15 users) that depend heavily on the program to manage their fundraising needs. *The Raiser's Edge Enterprise* includes everything the standard edition has and more. For more information about *The Raiser's Edge Enterprise*, contact our Sales department at 1-800-443-9441 or email [solutions@blackbaud.com](mailto:solutions@blackbaud.com). You can also visit our Web site at [www.blackbaud.com](http://www.blackbaud.com).

The remainder of this section includes an extensive list of other new features. These features are divided into the categories to which they apply. Although this list is long, it is just an introduction to the hundreds of new features incorporated into *The Raiser's Edge 7*.

## Home

- The Home page in version 7 can be customized using Favorites and adding Dashboard panels. Using Favorites, you can add links to your most commonly used records and functions in one place for quick access. You can also create links to all of your favorite Blackbaud resources, such as the Blackbaud Web site and the user guides. You can add these links directly on the Home page or you can organize them in folders. Favorites can be defined from the Home tab in User Options, from any **Favorite** menu, or by clicking **Customize Home Page** on the Home page action bar.

## Constituents

- Add employees to organization records without adding them as constituents in the database.
- The **State** table, which you can modify, holds more than two characters to accommodate international addresses.
- Establish multiple alias fields for individual and organization constituents.
- Press **F5** on your keyboard when adding or editing Notes to stamp it with your user name and the date.
- Link organization records to parent company's records.
- Store multiple businesses.
- Store addresses for non-constituent relationships.
- Ability to create a quick letter from a constituent record. A quick letter automatically defaults today's date, primary addressee, preferred address, and primary salutation in Microsoft *Word* for you to begin writing your constituent letter.
- The format options hard break and conditional break for addressee/salutations are displayed with a back slash ( \ ) in the drop-down list on the record.
- Designate one of two linked spouse records as the Head of Household for mailings.
- Search for constituents by using **Address lines**.
- The **Deceased** field in version 6.42 is a checkbox in version 7. You can continue to store deceased dates.
- Some fields support fuzzy dates, which means you can enter only the month and year or just the year. Examples of these dates are **Birth date** and deceased **Date**.

- When you select an attribute with a data type of Constituent Name, you can press **F7** on your keyboard to use the Search screen to locate a constituent.
- Mark a constituent as inactive.
- Mark a constituent with no valid address.
- Store multiple credit cards.
- Set security for credit card fields.
- Sort constituent codes.
- Address tab stores all addresses.
- Ability to mark an address as preferred and then select to print preferred addresses in *Mail*.
- Export grids such as **Constituent Codes**, the **Address** grid, and the **Gift** grid directly from the constituent record.
- Ability to merge constituents from a constituent record.
- Edit addressee/salutations.
- Rich text format for Notes.
- Print the Relationship Tree.
- All relationships have addresses, even if they are not constituents.
- Include record annotations. Annotations are messages you can display when a record opens.
- Organizations can be marked **Constituent is an honor/memorial**.

## Gifts

- Gift type of Planned Gift (if you use the optional module *PlannedGiftsTracker*).
- Create regular or recurring gifts for any constituent.
- Add gifts without opening the constituent record.
- Split campaigns, funds, appeals, and packages for all gift types.
- Specify multiple solicitors for a gift.
- Specify amounts for each solicitor.
- Enhanced search capability for searching for campaigns, funds, appeals, and solicitors.
- Enhanced ability to generate a single acknowledgement letter directly from the gift record using *Word* integration.
- Create user-defined gift subtypes for any existing gift type.
- Store benefit information for each gift. Use this value to calculate the **Receipt** amount.
- View a history of reminders sent for Pledges and Recurring Gifts.
- View letters previously sent to the constituent from the Gifts tab.
- Add multiple notes for each gift.
- Specify a soft credit amount for each recipient.
- View the GL distribution for each gift along with project information. Interfund entries are allowed.
- Enhanced ability to view Pledge payments on the Pledge record.
- View transaction information for generated transactions for Recurring Gifts.
- Linking gifts to memberships and events is enhanced.

**Note:** This guide is designed to help you plan your conversion to *The Raiser's Edge 7* and introduce you to critical components of the conversion process. For complete information on the conversion process itself, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

- Edit the event registration when linking a gift to an event.
- Use business rules set up in *Configuration* to enhance gift rules.
- Access Gift Summaries from anywhere on the constituent record.
- Specify and save your own breakdown options for the giving breakdown grid and graph.
- Ability to convert Pledges to Recurring Gifts.
- The **Go to** functionality has been enhanced to allow you to open a selected record in a grid for the Gift Summary.
- Constituent giving history has enhanced view capabilities for grouping linked gifts.
- Gift summary filters enhanced for better filtering options.
- The Accountability Summary communicates to donors how gifts they donate are spent or budgeted to be spent.

## Actions

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

- Create actions for any constituent, event, or proposal.
- Open actions without opening a constituent record.
- Action queries are available.
- Designate actions with categories: Phone Call, Meeting, Mailing, Email, or Task/Other.
- Ability to create a quick letter from a constituent's action record. A quick letter automatically defaults today's date, primary addressee, preferred address, and primary salutation in Microsoft *Word* for you to begin writing the letter.
- Create an action record when sending an email or a letter.
- Assign actions to multiple solicitors. Solicitors can view their assigned actions on their own constituent record from the Actions tab.
- Multiple solicitors and users can be reminded of upcoming actions.
- Track action reminders in *The Raiser's Edge 7* or *Microsoft Outlook*.
- Create follow-up actions. When an action is marked as completed, you are prompted to add a follow-up action. The follow-up action defaults some fields from the original action.
- Access new action summary report from the Reports page; summarize actions by status, completed, not completed, assigned to, attributes, month, fiscal year, calendar year, contact, and proposal.
- Actions can have multiple default sets.

## Campaign, Fund, and Appeal Records

- Mark campaigns, funds, and appeals as inactive.
- Limit gift entry to associated appeals for campaigns and funds.
- Limit gift entry to associated campaigns for funds and appeals.

- Limit gift entry to associated funds for campaigns and appeals.
- Track attributes for each campaign, fund, and appeal.
- You can have solicitors or solicitor teams assigned to a campaign or fund.
- Interfund entries for GL account distribution.
- Subtype for gift types with ability to specify separate GL account distribution.
- Establish default benefits for appeals.
- Track appeal packages, along with the number solicited per package, package goal, and package attributes.
- The **Include notes on receipt** checkbox on the Appeal record prints the Benefit Note on receipts.
- You can add actions for appeals.

## Notepad

- Spell check and thesaurus are available.
- Option to insert time stamp that includes the date, time, and Raiser's Edge user name.

## Gift Batch

- *Batch* now includes three types of batches: Gift, Constituent, and Time Sheet (if you use the optional module *Volunteer Management*).
- Auto-format the batch ID based on the year.
- View the history of batch numbers to which a recurring batch has been committed.
- Edit the event registration when linking a gift to an event.
- Print multiple batches on a single deposit ticket or credit card report.
- Expanded list of available fields in the constituent window for gift batches.
- When you receive stock/property gifts from your constituents, you can easily enter the new stock/property gift and the sold stock information for the gift in the same batch row.
- Define default information for fields in the constituent window.
- Add constituent attributes via the constituent window.
- If you use the optional module *Electronic Funds Transfer*, the following functionalities are now included in the *Batch* module: Automatically generating transactions and payments for pledge and recurring gifts and creating EFT transmission files.
- Ability to sort rows in a batch.
- Enhanced Validation Report that includes all gift details.
- You may select to open the constituent record from the batch and edit any spouse information in version 7.
- Previous selections you make on the batch Commit screen save automatically for the next time you post a batch.

## Constituent Batch

- *Batch* now includes three types of batches: Gift, Constituent, and Time Sheet (if you use the optional module *Volunteer Management*).

The list of available fields has been greatly expanded to include:

- Multiple solicitor assignments (assigning a solicitor to a constituent).

- Multiple solicitor campaign, fund and unspecified goals.
- Multiple relationships.
- A single education record.
- A single bank record.
- Multiple additional addressee/salutations.
- Multiple appeals.
- Multiple notes.
- A single action.
- Multiple attributes for each attribute category.
- More comprehensive volunteer information.
- A single 'New' membership.
- Prospect information.
- Add relationships and link new relationships.

## Time Sheet Batch

- Only included in *Batch* if you use the optional module *Volunteer Management*.
- Summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time.
- You can search for the volunteer's name and for the job you assigned the volunteer.
- Ability to add information to the batch such as hours worked and position worked.
- Once you commit the time sheet batch, the time sheet information is added to the Volunteer tab of a constituent's record.

## Query

- Seven new query types: Fund, Job (with *Volunteer Management*), Member (with *Membership Management*), Participant (with *Event Management*), Action, Appeal and Campaign.
- New Ask at Runtime wizard prompts you for parameter options each time you run the query.
- Create a query from an existing dynamic query.
- Enhanced formatting capabilities on a per column basis for query results.
- Send the query in an email from the Results screen.
- Ability to query on Summary Information for tributes.
- Using a Gift query type, you can query on Pledge Balance.
- You can select address processing fields for your query.

## Mail

**Note:** If you use Blackbaud standard forms for Mail tasks in version 6.42, such as Phonathon forms or Appeal Cards, you can continue to use these in version 7. For more information about Blackbaud Forms, go to the Blackbaud Web site at [www.forms.blackbaud.com](http://www.forms.blackbaud.com). You can also contact Forms through email at [businessforms@blackbaud.com](mailto:businessforms@blackbaud.com) by calling 866-4-BB-FORMS (866-422-3676), or by fax at 843-216-6100.

- If you use the optional module *Event Management*, you can print name tags and place cards.
- Follow-up letters.
- Mail task parameters can be saved. This eliminates the need to re-create commonly processed mail tasks.
- Ability to filter on solicit codes.
- Use the Microsoft Mail Merge Wizard to simplify simple and conditional mail merges using *Word* integration.
- Soft credit and year to date information can be included in Donor Acknowledgement Letters.
- You can add, update, or delete attributes.
- By marking the **One per page** checkbox, you can add a custom message to create a full page reminder, appeal card, or receipt.

## Reports

- New options available in *Reports* for User options.
- Establish business rules for reports to include or exclude deceased constituents. The business rules you select default for new reports, but you can change these rules on a report by report basis.
- Report parameters can be saved. This eliminates the need to re-create commonly processed reports.
- Adjusted Gift Report provides an audit trail of adjusted gifts.
- Run Pledge reports using gift queries.
- Create color schemes for reports.
- Ability to create Pivot Reports to “slice and dice” data retrieved from a query.
- Control reports include more detailed parameter information.
- Constituent Directory report.
- Proposal Pipeline Summary(if you use the optional module *Prospect Research Management*).
- Ability to export in .pdf (portable document format).
- Improved report flexibility.

## Dashboard

- New functionality that is ideal for development directors, executives, or any user who needs to quickly access data.
- Provides a real-time snapshot of your organization’s data in just a few short steps.
- Ability to process hundreds of reports, or “panels” for campaigns, funds, appeals, gifts, solicitors, members, events, proposals, volunteers, and actions.
- You can open records from Dashboard panels.
- Many panels contain a more detailed section for more information.
- Graphing capability.

## Export

- More export types: Campaign, Fund, Appeal, Participant, Membership, and Job.
- More export formats: Access 95 and 2000, 97, XML, ADO, Blackbaud Simple Word Merge, Blackbaud Conditional Word Merge, and Character-Separated Values.

- Use the export formats Blackbaud Simple Word Merge and Blackbaud Conditional Word Merge to simplify mail merges using *Word* integration.
- You can print preview and print the first fifteen rows of the export file layout.
- Easy to use wizard interface including a relational layout of all the tables and fields.
- Higher limit on number of fields to export. The number of fields to export is limited only by file format; no limits exist for CSV, Word, and WordPerfect merge formats.
- Multiple Summary Criteria. For example, you can easily set up multiple “First Gift” criteria groups. This allows you to export the amount, fund, and other fields you need for the first cash gift given by a constituent in 1998 and the amount, fund, campaign, and other fields you need for the first pledge gift given by a constituent in 1999.
- Select to include or exclude deceased, inactive, or constituents with no valid address present. **Head of household** option in version 7 acts similarly to the **Exclude Duplicate Spouse** option that existed in *Mail* in version 6.42.
- Filter the export categories shown.
- Export file names support up to 100 characters.
- Export linked information such as linked membership gifts and linked relationship addressees and addresses.
- Export GL debit, credit, and project numbers.
- More options for selecting which gift date to use: **Gift date**, **General Ledger Post Date**, **Date Added**, or **Date Changed**; **Date range** allows for specific date ranges or values such as today, this month, or this fiscal year.
- You can increase or decrease gift amounts by a set amount, format with an option to round to whole numbers when using amount, or percentage.
- Include field names in addition to the field values regardless of the export format.

## Configuration

- Define system level business rules.
- Ability to make **Constituent Code** a required field.
- Change ID number sequence for constituent IDs, gift IDs, membership IDs, and event IDs.
- Reset IDs at start of new year.
- Prefix ID with year.
- Table Cleanup facility merges table entries.
- Sample display at bottom of GL screen based on Journal Reference.
- New letter correspondence types.
- Letter description can be up to fifty characters.
- Mark a letter as inactive.

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to *The Raiser's Edge 7*. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

- Copy fields from another letter with the **Copy From** button.
- Mark an attribute for “Only allow 1 per record”.
- New attribute data types: Fuzzy Dates and Constituent Name.
- Print financial information.

- More fields available for Addressee/Salutations.
- Define unlimited **Donor Category** tables.
- Define and display only active table entries.
- If you use the optional module *Membership Management*, you can sort membership category table.
- Place Organization Name in the duplicate criteria for individual records.
- View the constituent's business organization name in the search results in *Records*.
- Sort the letter table.
- Financial Institution Cleanup facility merges banks.
- If you use the optional module *Membership Management*, you can print membership category list.
- Set add, edit, and delete rights for campaigns, funds and appeals (separately for each record type).
- Establish preference to display the organization name or database name in title bar of all modules.

## Administration

- Depending on the optional modules you have, System Statistics includes Membership Transactions, Participants, Tributes, Jobs, and Proposal.

## Import

- Save multiple import parameters.
- Create and import a fixed-length file.
- Select the field separator (comma, tab, semicolon, space, or other) used.
- You no longer have to use every field in the import file.
- Field mapping capability has been included in version 7. The headers you use in the import file do not have to be exact fields.
- Ability to automatically reciprocate relationships for constituent imports.
- You can select to use the duplicate criteria you establish in *Configuration* when checking for duplicate records during the import process.

## Global Add

- Global Add: Businesses, Email, Education/School, Memberships, Addressee/Salutations, Constituent Codes, Attributes, and Notepads.
- Global Change: Events, Memberships, Campaigns, Funds, and Appeals.
- Global Delete Facility: Memberships, Proposals, Attributes, and Tributes.
- Run a Pre-Delete report to show who or what will be deleted.
- For each delete option there is an additional tab to define the records to exclude. For example, when deleting gifts you can choose to not delete gifts that are linked to a membership, event, or tribute, or are acknowledged, posted, or receipted.

## Global Write-off of Pledges

- Enter a start and end date.
- Write off installment balances due on or before a date or write off the full balance.
- Create a query of written-off gifts.

- Filter by campaign, fund, appeal, or constituent code.

## Post to General Ledger

- Define how the posting report prints (For example, you can select portrait or landscape and select the field by which to sort the report. You can sort by post date, account description, reference, amount, account number).
- You can select to post your gifts by “Summary(Cash/AR Only)”. The program creates a **General Ledger** batch that summarizes the debit side by **Raiser's Edge** batch ID (Cash or Accounts/Pledges Receivable). This selection also processes credit details (Revenues). This makes the reconciliation between the deposits on your bank statement and the **General Ledger** cash account much easier.
- Ability to filter gifts you post by query, gift date or GL post date, specific dates, and funds.
- You can view **Raiser's Edge** gifts posted to **General Ledger's** close accounting periods (if you use **The Financial Edge**).
- Ability to record event (if you use the optional module *Event Management*) and appeal expenses in the **Financial Edge** and view these expenses in **The Raiser's Edge**.

## Merge Constituents

- Exclude soft credit gifts when merging gift information.

## Drop Lapsed Members

New features if you use the optional module *Membership Management* include:

- Use a query of records.
- Enter a date range.
- Drop date can be members' expiration date.
- Filter by category, program or constituent code.
- Create a query of dropped members.

## Security

- Security now a part of Administration.
- Remove rights to view the **Credit Card, Target, Income, Ethnicity, Religion, and Social Security Number** fields.
- You can link a **Raiser's Edge** user to Microsoft *Outlook*. You can also link a **Raiser's Edge** user to a constituent record.
- Give security rights to only specific reports.
- Option added to prevent users from deleting a batch.
- Save a security group or base security group on another.
- Ability to establish user options when creating security rights for each **Raiser's Edge** user.

## Custom View

**Note:** Custom View is used with Microsoft *Internet Explorer 6*.

- Using this feature, you can create customized views of individual and organization constituent records in your database.

- Easily select and organize the fields you want to appear for a constituent record.
- Ability to select and view only what is important and functional for your organization.

## Honor/Memorial Tracking

- Organizations can be tribute records.
- Specify the default letter for each acknowledgee.
- Open any gift given to the honor/memorial from the Honor/Memorial tab.
- Set up multiple tributes for an honor/memorial and specify who receives acknowledgement letters for gifts given to each tribute.
- You can add a default fund for a tribute.
- Acknowledgees are no longer required to have their own constituent record.

## Membership Management

- Add joint members where multiple records are linked to the same membership.
- Designate children on memberships.
- Enter free-form text in **Notes** box.
- Set User Options to show memberships in different colors based on standing (Active, Lapsed, Dropped, Primary, or Joint).
- Summary option to show number of gifts, the total given, the number of times the membership was Dropped, Active, or Lapsed.
- Link a solicitor to a membership record
- Checkbox option to print renewal notices (specific to the membership record).
- Mark memberships as “Lifetime” so renewals are never sent and membership never expires.
- Print membership cards for non-relationships.
- New fields available when setting up cards to print: **Type of Card** (such as Guest, Temporary, Corporate), an editable field for the name format to print, valid date range fields, and an option to select the address you want to print.
- Renewal schedule from Membership Categories in *Configuration* displays on the record.
- Send benefits to the donor or the member.
- Track the date the benefit was sent and any additional comments about that benefit.
- Define the **Count**, **Unit Cost**, and **Total Benefit/Value**.
- **Auto Pick** button automatically selects the applicable membership categories, based on the dues amount.
- **Past Renewals** sent button.
- Export membership history directly from records.
- Link one membership transaction to multiple gifts. For example, you can link a pledge with five payments to the New Membership transaction. These gifts can also come from other constituents.
- Apply only a portion of a gift to a membership.
- When linking a gift to a membership, the dollar value the member receives in benefits is subtracted from the receipt amount automatically (if option selected in *Configuration*).
- A new **Program** field (broad group for a membership. For example, Adopt an Animal. **Category** may be Benefactor or Individual).

- A new **Subcategory** field further defines the category. For example, within the Benefactor category, you may select Bear or Lion.
- Attributes for each Membership.
- Set default values for each membership category (date of expiration for New, Renew, Rejoin).
- Set defaults for new gifts added as a result of a membership (such as **Fund, Amount, Receipt, Post Status**).
- Hide inactive membership categories.
- Query on gifts that are linked to a membership.
- Query on Summary Membership Information (such as Consecutive Years without a drop, date first joined, last renewed on, last dropped on, number of active memberships, total years as a member, total times renewed, total dues paid).
- Create output queries in all membership reports.
- New Expired Membership Report lists any membership that expired during a specified date range regardless of the current status.
- New Joint/Member Card List report shows who is listed as a joint member.
- Most Membership reports allow use of either membership dates or gift dates.
- Globally add memberships to records.
- Globally increase or decrease the expiration date as well as other fields.
- **Globally Drop Lapsed Members** can: use a query; enter a date range the expiration date must fall within, select filters (constituent codes, membership programs or categories).

## Membership Scanning

- Add photo IDs.
- Ability to select the membership fields you want to display, membership benefits, or addresses on the Membership Scanning page.
- You can Upgrade or Downgrade a membership from *Membership Scanning*.
- Print membership cards directly from *Membership Scanning*.
- Ability to view other memberships for a member.
- Add sound files.

## Event Management

- **Event Category** field is available so only fields appropriate for the category specified are shown on both the event record and the participant record. The following categories are available: Sporting Event, Dinner, Class, and Other.
- Event seating enhancements.
- With the additional module *Volunteer Management*, you can assign jobs and volunteers to any event. You can create assignments for event volunteers and link the assignment to a job record for the event.
- Link actions to events for creating task lists. These actions are not linked to a constituent, but to the actual event.
- Identify registrants, guests, and sponsors for each event. Each registrant, guest, or sponsor is considered a participant and can also be identified as a speaker, volunteer, instructor (classes only), event coordinator, or vendor. All may participate in the event.
- Link multiple gifts to events. Besides linking gifts to register for an event (registration fees), you can link gifts to indicate other donation items or services (Gift-In-Kind donations), or that a constituent supported a participant in their event participation (sponsoring Pledge).

- Track a solicitor on a registrant's record.
- More flexibility for lodging, dining, and other types of event charges (For example, child care or registration fees).
- Open a participant from a constituent's Event tab.
- Ability to print name tags and place cards in *Mail*.

## Prospect Research Management

- **Prospect status** field added to a prospect's general information.
- Create a summary of prospect information, which includes: Last proposal, Amount asked, Amount funded, Last action, Last gift, and Total gift as well as a chronology of actions, proposals, and gifts for that prospect.
- The **Gifts to other Organizations** grid now includes a **Comments** column.
- Create a graph displaying financial information. A total financial information label displays the total of all financial information records for that prospect.
- Two fields added to proposals: **Current amount asked** and **Date asked**.
- Link gifts to proposals directly from the gift record. One proposal can generate many gifts. Link gifts from the proposal record.
- Link media objects directly to proposals. Media records are stored on the Media tab of a constituent record.
- Notes and attributes added to the proposal record.
- Assign multiple solicitors to the proposal.
- Define the data type of descriptions for user-defined ratings.

## Task Scheduling

- *Task Scheduling* is now centralized in *Admin* rather than located in the individual modules.
- You can include multiple modules in a queue.
- Ability to send queues as email.
- The Run Queue screen is not connected to the **Raiser's Edge** database, so backups of your database can be performed while a queue is scheduled. However, the database must be running when the queue begins processing. It is important to remember that backups can still occur even if you are unable to log out of the database.
- Tasks can be assigned to different printers.
- Ability to create a new queue from an existing queue.
- You can select from a list of Recently Accessed Queues.
- You can add queues to Favorites.
- A Properties screen which includes last run information.
- Ability to organize tasks in a queue using **Up** and **Down** buttons.

## Volunteer Management

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

- New Jobs record.
- Jobs may be independent or linked to either an organization or an event.
- Ability to track mandates (volunteers mandated by a court or some other legal institution to complete some type of volunteer service).
- Track requirements for volunteers before starting work at your organization.
- Track multiple volunteer types, volunteer interest, and volunteer attributes.
- Match a volunteer to a job from the volunteer's availability, interests, skills, experience, courses, training, medical information, and special needs.
- **Find Jobs** button on the Volunteer tab allows you to quickly assign volunteers to jobs.
- **Find Volunteers** menu option on the Jobs record allows you to quickly assign volunteers.
- Run and print a volunteer summary report in *Records*.
- New reports: Job Assignment/Department Report, Annual Statistics Report, Monthly Statistics, Client Advocacy (Mandated) Volunteers Report, License or Training Expiration Report, Volunteer Job Profile, Volunteer Hours Report, and Checklist Report.
- Volunteer and Job query types.
- Add volunteers' hours in *Batch* for new constituents.
- Volunteer Summary Report now maintains query order.
- Volunteer Summary Report allows you to group the report by month, year, jobs assigned, organization, department, and location.
- Globally add time sheets.
- Enlarge data entry columns.

## Point of Sale

- Add new customers in *Microsoft Retail Management System* (formerly called *QuickSell Commerce*) as new constituents in **The Raiser's Edge 7**.
- Option in the Update the Raiser's Edge wizard that updates email addresses and phone numbers from *Microsoft Retail Management System* to **The Raiser's Edge 7**.
- Ability to sell products over the Internet.
- New version of *Microsoft Retail Management System*.

## Sample Installer

- You can install sample queries, exports, custom reports, business rules, and more when you convert to **The Raiser's Edge**. Some of these items save the time it takes to create them yourself. Others may serve as starting points to get the specific results you are seeking. To access the Sample Installer, select **Tools, Install Samples** from the shell menu bar.

## Blackbaud Management Console (BMC)

- The Blackbaud Management Console takes you step-by-step through converting your existing **Raiser's Edge** database.
- Includes links to several database-maintenance wizards and utilities. With the help of these wizards, you can identify your server platform, enter a server name, define memory cache size, and select a network communication protocol, plus much more.

# Differences Between Version 6.42 and Version 7

**Warning:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to *The Raiser's Edge 7*. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

*The Raiser's Edge 7* is a new software product full of new technology and hundreds of client suggestions that provides an enhanced solution for your development and non-profit needs. Certain functions have changed between version 6.42 and version 7. You may find it necessary to explore a different approach within *The Raiser's Edge* to complete these functions. As with any new software package, you should expect a learning curve for obtaining the knowledge to work with *The Raiser's Edge 7*. The Four Essential Keys are the best solution for you to use as a guideline for a smooth conversion to version 7. For more information about the Four Essential Keys, see "Planning Is Key" on page 29.

The items in this section highlight the differences between version 6.42 and version 7. We continuously reevaluate and consider these for inclusion in *The Raiser's Edge 7*. At this time, you should become familiar with the differences, and prepare for them as you plan your conversion.

## General

- **ENTER** key on your keyboard does not move the cursor to the next field.
- The Open screen does not have shortcut key functionality.
- **Check for Maiden Name** is not an option by which to search on the Open screen, however **Check aliases** is available. Maiden names convert to aliases and a Business Rule can be set to automatically add maiden names to aliases.

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **ALT + 2** on your keyboard to select the Bio 2 tab.

- **Cut**, **Copy**, and **Paste** are not available on the toolbar. They are accessible as shortcut keys or by right-clicking.
- Opening a group of records from a query is not available on the Records page. In version 6.42, this could be done in *Constituent Management* through **File, Group**. In version 7, records can be opened directly from the query Results tab.

## Constituents

- List of tree view options on tabs in the constituent record does not contain check marks when data is present. For example, **General**, **Gifts to Organizations**, and **Financial Information** in the tree view on the Proposal tab does not appear with a check mark indicating data is present.
- Fields marked required check only for validity on new records and when you edit a required field.
- The relationship address on the Relationships tab of a constituent record is not linked to the relationship's constituent address.

**Note:** Auto Complete occurs when you type the first few letters of information in a field, and the rest of the information automatically defaults in. For example, if you type "Ms. Mel" then "Ms. Melanie Taylor" automatically defaults.

- Auto Complete is not available for primary addressee/salutations. However, it is available for additional addressee/salutations.
- In version 7, you are not required to break the link of a spouse before adding a new spouse. If you add a new spouse, the original spouse link is automatically broken.

## Gifts

- Non-EFT pledges may not be paid with EFT generated gifts.
- The filter option of **Gift Type** is no longer available on the Gift tab of a constituent. You can select to view gifts grouped "By Gift Type".
- Cash Reversals are no longer an option. Changes to gifts are stored as Adjustments.

## Relationships

- The **Org name** field on the **Business** button on the Bio 1 tab is required in version 7 for an individual's business information.
- Addressee/salutations for contacts and other relationships are linked to the constituent record. For example if you change a relationship's **Primary addressee** on the General 2 tab of an organization's record, this changes the **Primary addressee** on the Addressees/Salutations tab of the relationship's constituent record.

## Campaigns, Funds, and Appeal Records

- Sorting campaigns, funds, and appeals using the **Up** and **Down** buttons is not available.

## Batch

- The arrow keys do not navigate throughout *Batch*. Use the arrow keys in conjunction with the **CONTROL** key on your keyboard. For example, **<CTRL> + RIGHT ARROW** key moves your cursor to the right.
- Printing multiple Batch Validation Reports simultaneously is not available.
- Campaigns and appeals do not default from the pledge gift record for a pledge payment in *Batch* unless **Campaign** and **Appeal** are fields selected in the batch.

## Gift Batch

- Proposals, memberships, and event registrations are added to the database when the link to the proposal, membership, or event is created in *Batch*. In version 6.42 they were not added until the batch was posted.
- In Recurring batches, membership gifts do not automatically renew memberships.
- In Recurring batches, membership, proposal, and event gifts only link the gift to the membership, proposal, or the event the first time the gift is linked.
- You cannot select "Posted" for a gift in *Batch* and then apply the posted cash gift to a pledge.

## Constituent Batch

- Spouse information stored in the **Business** and **Education** buttons are not available as fields in *Batch*.

## Query

**Note:** This guide is designed to help you plan your conversion to *The Raiser's Edge 7* and introduce you to critical components of the conversion process. For complete information on the conversion process itself, see the *Conversion Guide* on our Web site at [www.blackbaud.com](http://www.blackbaud.com).

- A detailed list of queries is not available to print.
- The query type of *RE:Open* is no longer available.
- Print Preview is not available.

## Mail

- Separate name formats for each name to print on Phonathon Forms are not available.
- The Fund Description prints below Total Pledge and Amount Paid columns on 3 and 5-Column Pledge Reminders.

## Reports

- *WordPerfect* is not an available format to select when exporting a report.
- The Comparative Report does not list the total number of Increases and Decreases at the bottom of the report.
- The Cash Receipts Journal prints double-spaced if addresses are printing.
- Key Name is not always printed on the Alumni Class List.
- The Gifts-In-Kind Report does not print a subtotal for each constituent.
- Not all reports have the option to sort in query order.
- The Constituent Giving History report does not have the option to sort in zip code order. If you need to sort this report in zip order, create a query that sorts by zip to use in the Constituent Giving History report.
- The organization name is required to print for contacts.
- Participation is no longer on the Event Income Report.
- The ability to print one appeal per page is not available on the Appeal Analysis Report.
- The option to base hierarchy on **Constituent** or **Table** when filtering on Constituent Codes is not available for the Gift Summary Report.

## Profiles

- **Spouse Nickname** is not available as a field to print in a Constituent Profile. You can include an addressee/salutation with a nickname.
- When printing gifts in a Profile, the last column is **Reference**. The optional column you select prints in version 6.42.
- Registrants in an Event Profile automatically print in alphabetical order.

## Export

- The Format screen does not automatically display for all fields when the field is selected for output. For example, selecting **Addressee** as a field to output automatically outputs the constituent's primary addressee if available. Select **Format** to change the addressee format.

- The **Load Query Output Fields** option is not available in version 7.
- You cannot run multiple processes in the same instance of *The Raiser's Edge 7* as you could in version 6.42. To process an export and a query at the same time, open multiple instances of version 7.
- Exporting fields that do not apply to all records still contains information instead of being blank. For example, exporting **Gift Installment Frequency** exports as "Single Installment" for single installment Pledges and single installment Recurring Gifts, instead of exporting blank.
- Exporting **Total Amount** for constituents that have not made a donation to your organization exports as zero instead of blank.
- Output fields cannot be arranged in any order. They are grouped by the type of field and can only be rearranged within each type.
- The option to mark **Include Add/Sal Type** when exporting addressees and salutations is not available. The field is available to be selected on its own in version 7.

## Configuration

- **Credit Type**, **Card Number**, **Expires On**, and **Alias** fields are not available as duplicate search criteria.
- The gift **Reference** field cannot be a lookup field because it may contain 250 characters.
- **Volunteer Hourly Wage** is not an available field in default sets.

## Administration

### Import

- The Import validation process considers new records an exception because the record does not exist in the database at the time of the Import validation. However, the records import correctly.

### Global Add

- Copy, Swap, and Move, in regards to an attribute description or comment, are not available.

### Post to General Ledger

- Globally changing the post status of a gift from "Posted" is not a feature in version 7. Posted gifts may be edited using the Adjustment feature within the gift record. This provides a proper audit trail to synchronize with accounting software applications.

### Security

- Security groups which are assigned view only rights do not see the record in a disabled format. The record looks as if it may be edited, but the **Save** options are disabled.
- The ability to deny access to view campaigns, funds, and appeals is not available. You may limit access to the summary information of these records.
- You cannot deny users access to adding gifts through *Records*, and then allow them to enter gifts through *Batch*. Security to gifts is maintained throughout version 7.

## Membership Management

- The **Relationship** field is not available for all membership records. Only joint memberships have relationship fields.

- You cannot view past renewals per membership transaction; they can only be viewed for the entire membership history.
- You cannot view the Memberships History tab while adding a new membership.

## Event Management

- The ability to hide tabs in **Events** is not available.

## Grizzard

- There is no longer a direct interface with Grizzard. You may utilize the optional modules *VBA* or *API* to create an interface with other software applications.

# How Do I Request The Raiser's Edge 7?

**Warning:** Support for *The Raiser's Edge 6.x* ends on June 30, 2005. After this date, there will no longer be software updates, data repairs, access to version 6 Knowledgebase solutions, or Support assistance for this version.

To request *The Raiser's Edge 7*, complete the following steps.

- Prepare your conversion plan based on the Four Essential Keys. For more information, see "Planning Is Key" on page 29.
- Review the plan with your Blackbaud account representative.
- Complete *The Raiser's Edge 7* Software Request Form. You can receive this from your account representative or our Web site at [www.blackbaud.com](http://www.blackbaud.com).
- Obtain signatures from your Director, primary user, and the IT person on the form. This signed form is required to generate the shipment.

**Note:** To begin your request of *The Raiser's Edge 7*, contact your account representative at 1-800-443-9441 or email [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

- Fax the Software Request Form to your account representative at 1-843-216-6111.

With your shipment, you receive a printed copy of the *Installation Guide* and *Conversion Guide*. These guides take you step-by-step through the process of installing and converting to version 7.

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