# Which Guides Should I Read?

Many user guides accompany *The Raiser's Edge*. The chart below helps you decide which user guides to read, based on your job requirements, necessary tasks, and areas of *The Raiser's Edge* used most often. For a description of the information included in each guide, see the section below the chart.

We recommend accessing all guides from the Web site, as they are updated regularly. You can print all or selected pages to keep at your desk for reference. Some guides are written specifically for certain modules.

| IF YOU WORK WITH: | WE SUGGEST YOU READ: |
|---|---|
| Alumni(ae) | Alumni Data Entry Guide, Constituent Data Entry Guide |
| Campaign planning | Campaigns, Funds, & Appeals Data Entry Guide; Prospect Data Entry Guide; Event Management Data Entry Guide; Mail Guide; Mapping Guide |
| Converting from *The Raiser's Edge* 6.x to 7.x | Conversion Planning Guide, Conversion Guide |
| Database administration | Installation Guide; Update Guide; Program Basics Guide; Configuration & Security Guide; Database Administration Guide; Import Guide; Conversion Guide; Global Add, Change, & Delete Guide; Regular Supporters Implementation Guide |
| Development Directors, Executives, or need high-level overview of program | Dashboard Guide, Sample Reports Guide, Legacies Guide, Mapping Guide, Custom View Guide |
| Donor biographical data entry | Constituent Data Entry Guide; Batch Guide; Program Basics Guide; Custom View Guide; Global Add, Delete, & Change Guide, Data Enrichment Services Guide |
| Exporting data | Query & Export Guide, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide |
| Extracting or analysing information from the database, Solicitations, Prospect Management | Query & Export Guide, Dashboard Guide, Reports Guide, Summaries Guide, Constituent Data Entry Guide, Prospect Data Entry Guide, Queue for Task Scheduling Guide, Custom View Guide, Regular Supporters Implementation Guide, Mapping Guide |
| Events | Event Management Data Entry Guide; Volunteers & Jobs Data Entry Guide; Mail Guide; Event Gifts Guide; Global Add, Delete, & Change Guide |
| Gift entry, Gift Aid (including Direct Debits and Standing Orders) | Gift Records Guide; Batch Guide; Electronic Funds Transfer (EFT) Guide; Event Gifts Guide; Membership Gifts Guide; Tribute Gifts Guide; Proposal Gifts Guide; Regular Supporters Implementation Guide; Paperless Direct Debit Guide; Legacies Guide |
| Importing data | Import Guide, Import Tutorial, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide |
| Installing *RE:Anywhere for Remote Access* | RE:Anywhere for Remote Access Installation Guide |

To find out about changes and new features, you should read the Release Notes included with each *Raiser's Edge* update. Release Notes appear in *The Raiser's Edge* when you first update or on the desktop of your computer once you install the latest version.

| IF YOU WORK WITH: | WE SUGGEST YOU READ: |
|---|---|
| Installing *The Raiser's Edge* with *Oracle* or maintaining an *Oracle* database | Oracle Installation & Administrator's Guide |
| IT & Security | Installation Guide, Update Guide, Configuration & Security Guide, Conversion Planning Guide, Conversion Guide, Database Administration Guide |
| Legacy Giving Directors | Legacies Guide |
| Mail Merging, Creating custom forms | The Raiser's Edge & Microsoft Office Integration Guide, Mail Guide |
| Mailings | Mail Guide, Data Services Guide, Queue for Task Scheduling Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide |
| Marketing & Communications | Mail Guide, Constituent Data Entry Guide, Reports Guide, Summaries Guide, Mapping Guide |
| Memberships | Membership Data Entry Guide; Membership Scanning Guide; Mail Guide, Membership Gifts Guide; Global Add, Delete, & Change Guide |
| Online campaigns, donations, marketing, events, Web sites | NetSolutions Guide, Blackbaud NetCommunity Integration Guide |
| Phonathons | Mail Guide, Batch Guide |
| Posting to nominal ledger | Gift Records Guide |
| Reporting | Reports Guide, Sample Reports Guide, Summaries Guide, Queue for Task Scheduling Guide, Creating Custom Crystal Reports Tutorial, Dashboard Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide |
| Receipting | Mail Guide |
| Scanning membership cards | Membership Scanning Guide, Membership Data Entry Guide |
| Sending donors letters | Mail Guide, The Raiser's Edge & Microsoft Office Integration Guide |
| Text Messaging | Text Messaging Guide |
| Tributes, Honuor/Memorials | Tribute Data Entry Guide, Tribute Gifts Guide, Constituent Data Entry Guide |

| IF YOU WORK WITH: | WE SUGGEST YOU READ: |
|---|---|
| Volunteers | Volunteers & Jobs Data Entry Guide; Global Add, Delete, & Change Guide; Event Management Data Entry Guide |
| Writing code to customise *The Raiser's Edge* | API Essentials Guide, VBA Essentials Guide |

# What Is In Each Guide?

To access all up-to-date guides, select **Support**, **User Guides** from the menu bar of the Blackbaud Web site and click the link for **The Raiser's Edge Enterprise**. You can also access the guides from within the program by selecting **Help**, **User Guides** from the menu bar or from the Raiser's Edge bar.

The user guides are grouped under headings by topic, such as **Conversion & Installation**, **Getting Started**, **Records**, and **Gift Entry**. Click the name of the heading to see all user guides listed under it. To open a guide, click a user guide title.

We recommend you access all guides from the Web site, as they are updated constantly. You can print all or selected pages to keep at your desk for reference. Some guides are written for modules. Before you purchase a guide, make sure you have the module.



The guides available for *The Raiser's Edge* include:

**Conversion Planning Guide.** This guide helps you plan your conversion to *The Raiser's Edge 7* and introduces you to critical components of the conversion process.

**Conversion Guide.** This guide provides instructions for upgrading from previous versions of *The Raiser's Edge*. This book shows steps you can take prior to the conversion to help it go smoothly. It includes recommendations for cleaning up your database and spot checking records after conversion.

**Installation Guide.** This guide shows how to install *The Raiser's Edge* on your computer or network. This book contains preinstallation considerations, installation instructions, and troubleshooting information.

Have suggestions for the guides? Email documentationcomments@blackbaud.com.

**Oracle Installation & Administrator's Guide.** This guide contains detailed instructions for installing *The Raiser's Edge* for use with an *Oracle* database.

**RE:Anywhere for Remote Access Installation Guide.** This guide contains instructions for installing the Web-based version of *The Raiser's Edge*, *RE:Anywhere for Remote Access*. This book contains preinstallation considerations, installation instructions, and security and troubleshooting information.

**Web Services & Installation Setup Guide.** This guide includes instructions about how to install and set up Web services, such as *Blackbaud Gift Aid*, in *The Raiser's Edge*.

**Update Guide.** This guide contains instructions on how to update *The Raiser's Edge* to the most current version as well as information about the new features available. This guide is updated every release and should be read by every user.

**Program Basics Guide.** This guide includes information about navigation, procedures and how to set up user options. Information is also provided to help you write a *Data Entry Protocol Guide* for your organisation, which helps maintain data consistency.

**Database Administration Guide.** This guide contains information about how to set up and maintain your database using the utilities available in the Blackbaud Management Console.

**Regular Supporters Implementation Guide.** This guide shows how to manage aspects of your regular supporter programmes. The guide directs you to tools you need to maintain recurring gifts, use Gift Aid, accept electronic donations, keep donors committed, attract new donors, increase donation amounts, and communicate effectively about where donations are going. You also learn about reports that analyse how your programmes are doing, how many donors you have lost, how many have upgraded donations, and who you should target next.

**The Raiser's Edge & Microsoft Office Integration Guide.** This guide contains information on integrating *The Raiser's Edge* with Microsoft *Outlook*, *Word*, and *PivotTables*. Using these features, you can simplify mail merges using *Word*, and create versatile pivot reports. You can also synchronise *Raiser's Edge* records with *Outlook* contacts, appointments, and tasks.

**Blackbaud NetCommunity Integration Guide.** This guide shows how to manage and view information about your constituents' activity on your organisation's Web site when you integrate *The Raiser's Edge* and *Blackbaud NetCommunity*. The guide also provides instructions on how to view additional information from *Blackbaud NetCommunity* and how to create an Online vs. Offline Giving report to compare gifts you receive on your Web site to those received through other means.

**Mapping Guide.** This guide includes instructions and explanations about the mapping features available in *The Raiser's Edge*. The guide explains the Mapping page, the Map screen accessed from *The Raiser's Edge,* how to create maps, and much more.

**VBA Essentials Guide.** This guide provides detailed instructions on how to use the *VBA for Advanced Customisation* module to customise ***The Raiser's Edge*** for your organisation's policies and procedures. Using *VBA*, a program developer can create custom business rules, design custom screens, create Web site interfaces, and much more.

**API Essentials Guide.** This guide provides detailed instructions on how to use the *API for Advanced Application Development* module to customise programs that integrate with your ***Raiser's Edge*** database.

**Alumni Data Entry Guide.** This guide provides step-by-step instructions for accessing, adding, and working with alumni(ae) and their relationships.

**Campaigns, Funds, & Appeals Data Entry Guide.** This guide shows how to set up these records and how they interact with each other. You can create campaigns to establish your overall objectives for raising money, funds to show the specific purposes for the money you raise, and appeals as the promotions and solicitations that bring in gifts.

**Constituent Data Entry Guide.** This guide teaches you how to properly set up constituent records in your database. You learn how to manage biographical information, addresses, addressees and salutations, relationships, attributes, notes, media items, and appeals. You learn how to create a letter, set up a relationship tree, add a constituent annotation, merge constituent records, and convert an individual record to an organization and vice versa. You also learn how to set up action records, assign canvassers, and set up canvasser teams.

**Event Management Data Entry Guide.** This guide helps you manage all aspects of your organisation's events. You learn how to set up an event record, which encompasses the General, Prices, Expenses, Jobs, Actions, Attributes, Media, and Notes tabs of the event record. You also learn how to add participants to an event by using the Participants tab.

**Membership Data Entry Guide.** This guide includes detailed procedures on how to add, edit, and delete membership records. For example, you can learn how to add a gift of membership and rejoin a membership.

**Prospect Data Entry Guide.** This guide includes detailed instructions for managing all types of prospect information — tracking gifts made by prospective donors to other organisations; financial information, such as sources of wealth, annual income, and real estate holdings of prospective donors; and how your organisation can create proposals, documenting amounts solicited, amounts funded, and ratings data.

**Tribute Data Entry Guide.** This guide helps you use Honour/Memorial Tracking to effectively manage your honour/memorial records. It provides instructions to add and edit tributes and view gifts given to a tribute.

**Volunteers & Jobs Data Entry Guide.** This guide teaches you how to track all aspects of your volunteers. You learn how to track volunteer information on the Volunteer tab of a constituent record. Information includes volunteer types and statuses, emergency contact information, volunteer qualifications, medical information, special needs and availability, checklists of tasks a volunteer must complete before starting a job, award information, and how to assign volunteers to job records in your database. You also learn how to set up job records.

**Gift Records Guide.** This guide contains information and explanations for all procedures related to adding, editing, and deleting gift records. For example, you can learn how to reschedule a pledge and add a matching gift. In addition, you can learn about posting to nominal ledger and globally writing off pledges.

**Event Gifts Guide.** This guide contains information and explanations for all procedures related to adding and editing event gift records. For example, you can learn how to link a gift record to an event as an other donation and learn how to pay an existing sponsoring pledge from a gift batch.

**Electronic Funds Transfer (EFT) Guide.** This guide provides instructions for automatically generating and processing direct debit, credit card, and standing order transactions using an electronic funds transfer.

**Membership Gifts Guide.** This guide contains information and explanations for all procedures related to adding and editing membership gift records. For example, you can learn how to apply a pledge payment toward an existing membership and learn how to apply a recurring gift transaction to an existing membership.

**Legacies Guide.** This guide explains how to create gift records for your organisation's legacy giving, including information specific to legacy gift vehicle types. You can record the initial gift value and the gift's remainder value, store information for applicable gift vehicles, and track beneficiaries and relationships for a legacy gift.

**Proposal Gifts Guide.** This guide contains information and explanations for all procedures related to adding and editing proposal gift records. For example, you learn how to link a gift to a proposal record for another constituent and how to break the link between a gift record and a proposal.

**Tribute Gifts Guide.** This guide contains information and explanations for all procedures related to adding and editing tribute gift records. For example, you can learn how to add a tribute gift in a gift batch and edit tribute information entered on a gift record.

**Paperless Direct Debit Guide.** This guide contains information about processing paperless direct debits in *The Raiser's Edge*. This guide shows you basic gift entry in *Records* for instruction records, how to send the advance notice letter in *Mail*, and how to automatically generate instruction records, enter rejection codes, and automatically update the instruction information for gift records in *Batch*.

**Query & Export Guide.** This guide contains information about exporting data to other software programs and extracting information from *The Raiser's Edge*.

**Reports Guide.** *The Raiser's Edge* provides a wide variety of reports to help analyse aspects of your fundraising efforts. This guide includes explanations of each item on the report parameter tabs, as well as a section covering basic report procedures, and a tutorial for creating a report.

**Sample Reports Guide.** This guide includes descriptions and samples of each report available in *The Raiser's Edge*. The book also includes parameter tab settings used to generate each sample report. This guide is arranged by chapters based on various report categories available in the program.

**Summaries Guide.**  This guide provides instructions for creating summaries to track the performance of your organisation's canvassers, campaigns, funds, and appeals and to view a constituent's giving history.

**Mail Guide.**  This guide contains instructions for all mailing tasks, including producing index cards, receipts, reminders, appeal cards, acknowledgement letters, labels, and envelopes.

**Batch Guide.** This guide provides detailed information about entering multiple constituents, gifts, or timesheets into your database at once. Using *Batch* can greatly speed up your data entry.

**Import Guide.** This guide provides instructions for importing data into *The Raiser's Edge* from various sources, including other fundraising software. This guide is helpful to anyone who uses the program but is ideally suited for a user who is very familiar with *The Raiser's Edge*.

**Global Add, Delete, & Change Guide.** This guide contains steps for saving time by performing functions globally in *The Raiser's Edge*.

**Queue for Task Scheduling Guide.** This guide includes instructions for how to set up a series of tasks to run automatically and unattended. It explains how to schedule queues to export, print, or run information when all your volunteers and employees have left for the day.

**Configuration & Security Guide.** This guide explains how to configure *The Raiser's Edge* and set up security.

**Custom View Guide.** This guide provides information about creating custom views of constituent records in your database. By creating custom views, you can select to see only what is important to you. You can easily select and organise the fields to appear on a constituent record.

**Membership Scanning Guide.** This guide provides instructions for scanning barcodes to retrieve membership information from your *Raiser's Edge* database. You can also change a membership status, such as upgrading or renewing a membership.

**Text Messaging Guide.** This guide contains detailed instructions about how to set up and use text messaging to connect with your constituents. With *Text Messaging*, you can send and receive text messages with your constituents in *The Raiser's Edge*.

**NetSolutions Guide.** This guide provides instructions for how to set up and use this powerful tool to capture donations, and manage events and appeals on the World Wide Web.

**Dashboard Guide.** This guide contains instructions on how to take a "snapshot" of your fundraising success at any given time. *Dashboard* is ideal for development directors, executives, or users who need to quickly access data. Because *Dashboard* does not require a complete working knowledge of *The Raiser's Edge*, it is convenient for infrequent users.

**Data Enrichment Services Guide.** This guide covers the services located under this link on the Administration page. The AddressAccelerator chapter details updating and certifying addresses in your database.

**Creating Custom Crystal Reports Tutorial.** This tutorial takes you step-by-step through the basics of planning and creating a custom *Crystal* report. It also walks you through the steps of creating two of the most common custom reports: a phone list and a gift detail report.

**Import Tutorial.** •This tutorial shows you how to create a gift and constituent import file, change files in a Microsoft *Excel* spreadsheet, and import the updated information back into ***The Raiser's Edge***. You also learn how to create an import file in *Excel* and then import it into ***The Raiser's Edge***.