

Raiser's Edge Online User Clinic:

Batching in RE7

Wednesday – May 20, 2009

Blackbaud Representative:

William Jankins – **Solutions Engineer/ Product Expert**

Agenda



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

Blackbaud News and Updates

Upcoming Online User Clinics

- ◆ Action Tracks & Moves Management 6/17/2009
- ◆ Reporting in The Raiser's Edge 7 7/15/2009
- ◆ Homepage and Dashboards 8/19/2009
- ◆ Tracking Solicitors and Appeals 9/16/2009
- ◆ Importing 10/21/2009
- ◆ Mail Merge 11/18/2009
- ◆ Security in The Raiser's Edge 12/16/2009

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

Blackbaud News and Updates

Upcoming Web Seminars

- ◆ Intro to Basic Online Fundraising & Communication 6/4/2009
- ◆ Intro to BBNC GROW 6/17/2009
- ◆ Intro to Financial Edge for Raiser's Edge Customers 6/9/2009
- ◆ Building and Managing an Interactive Website 6/2/2009
- ◆ Blackbaud NetCommunity for... throughout May & June
 - Cause-Based and Service Organizations
 - Faith-based Organizations
 - Healthcare organizations
 - Higher Education Institutions

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

Blackbaud News and Updates

Upcoming Online Trainings

- **Advanced Importing** 5/28 and 6/17 (3 hours)
- **Analytical Reporting** 6/18 and 6/25 (3 hours)
- **Donor Acknowledgement Letters and Receipts** 6/19 and 6/29 (4 hours)
- **Database Doctor** 6/1 and 6/15 (3 hours)
- **Export** 6/11 and 6/16 (3 hours)
- **Managing Solicitors** 5/26 and 6/29 (6 hours)
- **Planned Giving in The Raiser's Edge 7** 6/8 and 6/17 (2 hours)
- **Query Essentials** 6/10 and 6/22 (3 hours)

View the complete schedule and register at:

www.blackbaud.com > Services > Training > Distance Learning

Blackbaud News and Updates

Classroom Training and Training Pass



Get full details at:

www.blackbaud.com – **Services, Training**

Blackbaud News and Updates

Blackbaud OnDemand

Do you need help managing technology?

- Keeping up with the Hardware and Software to run applications
 - Periodic hardware purchases and upgrades, ensuring that your system will perform at peak by employing the best technology
 - Upgrades and patches of Blackbaud and 3rd party software ensuring you are always on the latest version
- Knowledgeable resources, staff, and support
 - Implement changes when changes are needed
 - Perform regular tasks like back-ups and upgrades
 - Have expertise in both the application and infrastructure
- The right solution for Remote Access
 - Employing the right technology that simplifies access to your data while you're in or away from your office
 - Getting to your data when you need, and performing the right tasks and functions
- Focus on your mission, not the technology. Blackbaud can help you remove these responsibilities from your plate with outsourced solutions.

For more information please contact your Account Manager.

Blackbaud News and Updates

Data Management Services(DMS)

Do you need help managing technology?

The Data Management Services (DMS) offering consists of a full range of ongoing database related activities necessary to manage all or parts of your fundraising system.

DMS Offering #1

Direct Marketing Database Support

- **Complete direct marketing & database support**
 - Data hygiene
 - Segmentation and queries
 - Liaison with mail house
 - Liaison partner with strategy vendor
 - Run campaign and analytic reports
 - Post campaign history to Raiser's Edge
 - Use Raiser's Edge for simple direct marketing segmentation
 - Use Blackbaud Direct Marketing (SaaS or license) for mid-sized to complex direct marketing programs
 - Best Practice Consulting

DMS Offering #2:

Database Management Support

- **Complete database support**
 - Database Administrator on Retainer
 - Importing and exporting data (lockbox, tm, on-line)
 - Non direct marketing file pulls such as annual reports, newsletter, etc
 - Manage data overlays and data enrichment process
 - Complex queries and reports
 - Create and manage fundraising system process documentation

Blackbaud News and Updates

Internet Solutions

- Showcase a well-branded Web site
- Increase your Web presence
- Build an online community with supporters
- Accept online gifts, event registrations, and constituent updates
- Capitalize on multi-channel communication
 - eNewsletters
 - Emails
 - Message boards
 - And more!

Contact your AE for more information!

Blackbaud News and Updates

3rd Party Product Integrations



- **AuctionMaestro Pro** — Plan, organize and implement all aspects of your fund-raising auctions! Host online auctions!



- **PaperSave** — Provides a secure electronic storage system and audit trail for all source documents. Replace your traditional filing systems and go paperless! Seamlessly integrated with RE7 for easy document retrieval and data-entry!

Contact your Account Manager today!

Blackbaud News and Updates

Release Information

Raiser's Edge 7

Current release is 7.85

- Organize queries into categories & folders!
- Make attributes inactive to streamline data entry!

www.blackbaud.com – Support > Downloads

Version 7.91

- PCI compliance
- Currently in beta – early 2009 release
- SQL Server 2008 & SQL Server 2008 SP1 supported

Blackbaud News and Updates

PCI Compliance

What is PCI and PA-DSS?

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

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

Blackbaud News and Updates

PCI Compliance

- To learn more about PCI Compliance, visit us at:

[Blackbaud.com PCI Website](#)

[PCI Blog](#)

[PCI FAQs](#)

[Blog on Exporting/Printing CC#s](#)

Blackbaud News and Updates

BBPS (Blackbaud Payment Service)

What is the BBPS?

This is where credit card data and merchant account information will be stored when upgrading to version 7.91 or higher for CC processing via RE7 Batch. IATS or ICVerify 4.0.3 SP2 is required for use with BBPS. Also, an active Internet connection is required to use BBPS.

When I upgrade to version 7.91 what will happen to my credit card numbers?

Full credit card numbers will be transferred to the BBPS. After upgrading the card number will appear as truncated, meaning you will see 12 asterisks followed by the last 4 digits.

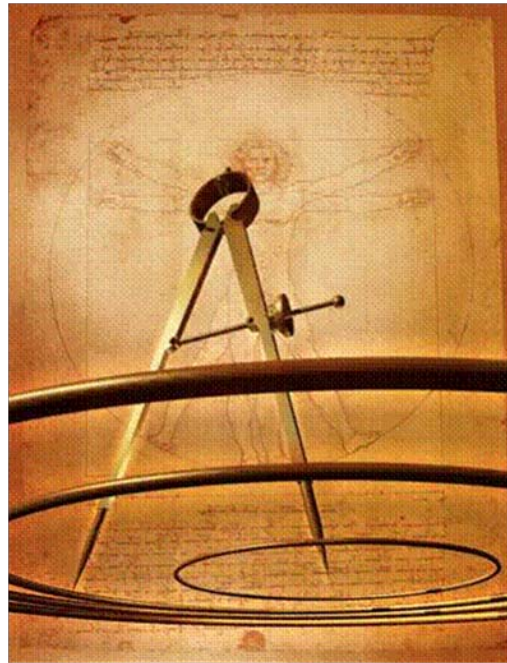
To see a demo of the update to 7.91, the PA – DSS/PCI compliant version of RE7, please visit the following link (Processing payments via the BBPS service is also demoed here):

<http://www.blackbaud.com/bb/democenter/pci.aspx>

For additional Information on the BBPS Service:

[BBPS Overview](#)

Using RE: Batch More Effectively in RE7



Hosted by: William Jenkins
Solutions Engineer/ Product Expert

BATCH: THE BASICS

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

1. Resources:

1. **User Guides** are accessed from within the software by selecting Help, User Guides:
 - **Batch Guide** – step by step instructions with real-life examples on how to effectively utilize this module. These guides are useful when you need in-depth information about a specific area of the program. You can view guides on your computer, or you can print selected pages or entire guides.
 - **Batch Quick Reference** - The Batch Quick Reference sheet lists function keys, general shortcut keys, and Batch shortcut keys that will assist you in entering information in Batch quickly and efficiently.
2. **Help Files** are designed to give you quick answers; it contains a table of contents, index, and search features that enable you to find information about all areas of *The Raiser's Edge* from a single location. To access the help file:
 - Click **Help** in the Raiser's Edge bar and select **Help Topics**
 - Select **Help, The Raiser's Edge Help Topics** from the menu bar
 - You can also access the most recent pdfs of the user guides from www.blackbaud.com. Click **Support, Documentation, User Guides**.

2. What is RE: Batch?

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

Why use batch?

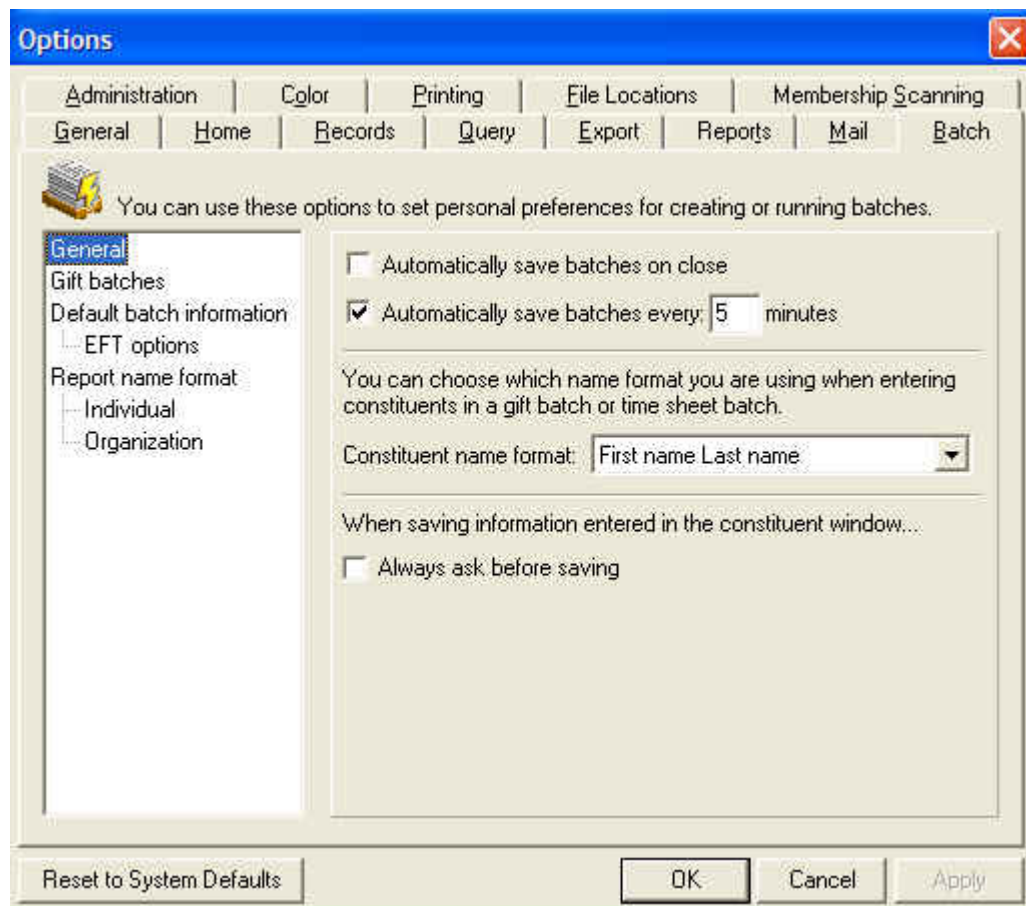
- With RE: Batch, you can enter and in some cases update information on constituent and gift records quickly because you do not need to open each individual gift or constituent record to add or update information.

Batch Types

- Constituent
- Gift
- Time Sheets (with RE: Volunteer only)

3. Batch Options – *User Options:

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



***User options are found by going to the main menu bar and selecting Tools, User Options**

4. Batch Options – *Configuration:

- Auto-assign Batch Numbers
- Be warned when a constituent has outstanding pledges, registration fees, etc.
- Enable Credit Card Processing via IATS: For more information on the IATS service, please visit the website at www.iats.ticketmaster.com
or contact an IATS representative toll free at 866-300-4287.

When generating Batch numbers...

IDs will be generated using the next available number:
The next available batch number is 1 Change Number

Prefix numbers with current year

Reset numbering at the start of a new year

Separate prefix from number using

Sample:

When adding a gift to a batch, warn if constituent has...

Outstanding pledge balances

Outstanding recurring gifts

Outstanding registration fees

Lapsed membership

When authorizing credit cards...

Process credit cards through

Account Description

***Config Batch options are found by going to the menu bar items and selecting Config, Business Rules**

5. Batch Setup – Batch Headers:

- Validation starts here!
- Auto-display to speed up data-entry!
- Recurring Batches
- Bank Deposits
- Security

Gift Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

Batch Statistics			
Running number of gifts:	0	Number of matching gifts:	0
Running amount:	\$0.00	Matching gift amount:	\$0.00
Created on:	01/09/2007 10:10:17...	Times committed:	0
Last changed on:		Last committed on:	
Created by:	Supervisor		

Batch number:

Projected number of gifts:

Projected amount:

Automatically display:

Description:

Batch is recurring

Include batch for bank depositing

Other users may access this batch

< Back | Next > | Cancel | Save | Data Entry

6. Batch Setup - Fields:

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

Gift Batch Setup

1:Batch Header 2:Fields 3:Defaults

Select the fields to be used for data entry in this batch.

Gift fields:

- Gift Fields
- Acknowledge
- Acknowledge date
- Amount
- Amount bills
- Amount coins
- Anonymous
- Appeal
- Authorization code
- Bank
- Campaign
- Cardholder name
- Check date
- Check number
- Constituent Code
- Constituent ID
- Constituent Name

Data entry fields:

- Constituent Name
- Amount
- Date
- Type
- Fund
- GL post date
- GL post status

Up

Down

Find...

Load from Existing Batch...

< Back Next > Cancel Save Data Entry



7. Batch Setup - Using Defaults:

- Speed up data entry
- Establish fields that always have the same value
- Optionally hide fields that always have the same information
- Data added here will be automatically added for each record!

Gift Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

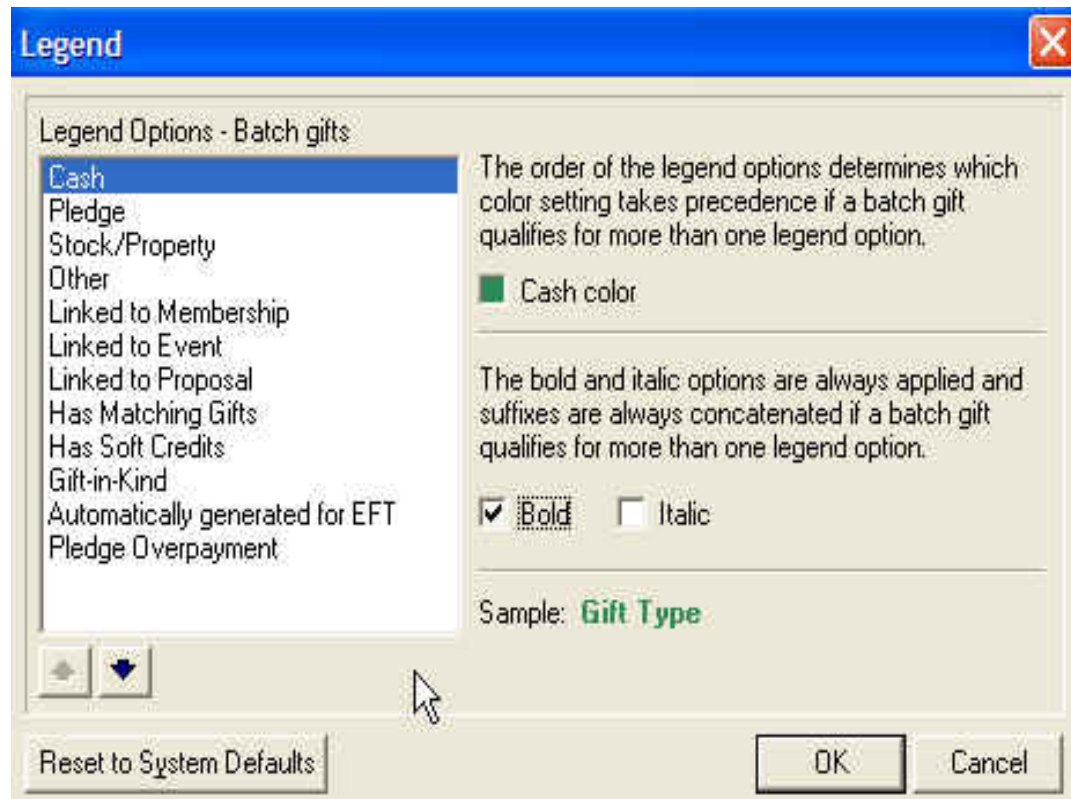
Field	Default Value	Hide?	Up	Down
Constituent Name		<input type="checkbox"/>		
Amount		<input type="checkbox"/>		
Date	01/09/2007	<input checked="" type="checkbox"/>		
Type		<input type="checkbox"/>		
Fund		<input type="checkbox"/>		
GL post date		<input type="checkbox"/>		
GL post status		<input type="checkbox"/>		

Note that the default value for fields that are hidden will be added to each gift in the batch.

< Back | Next > | Cancel | Save | Data Entry

8. Batch Setup – Color Legends:

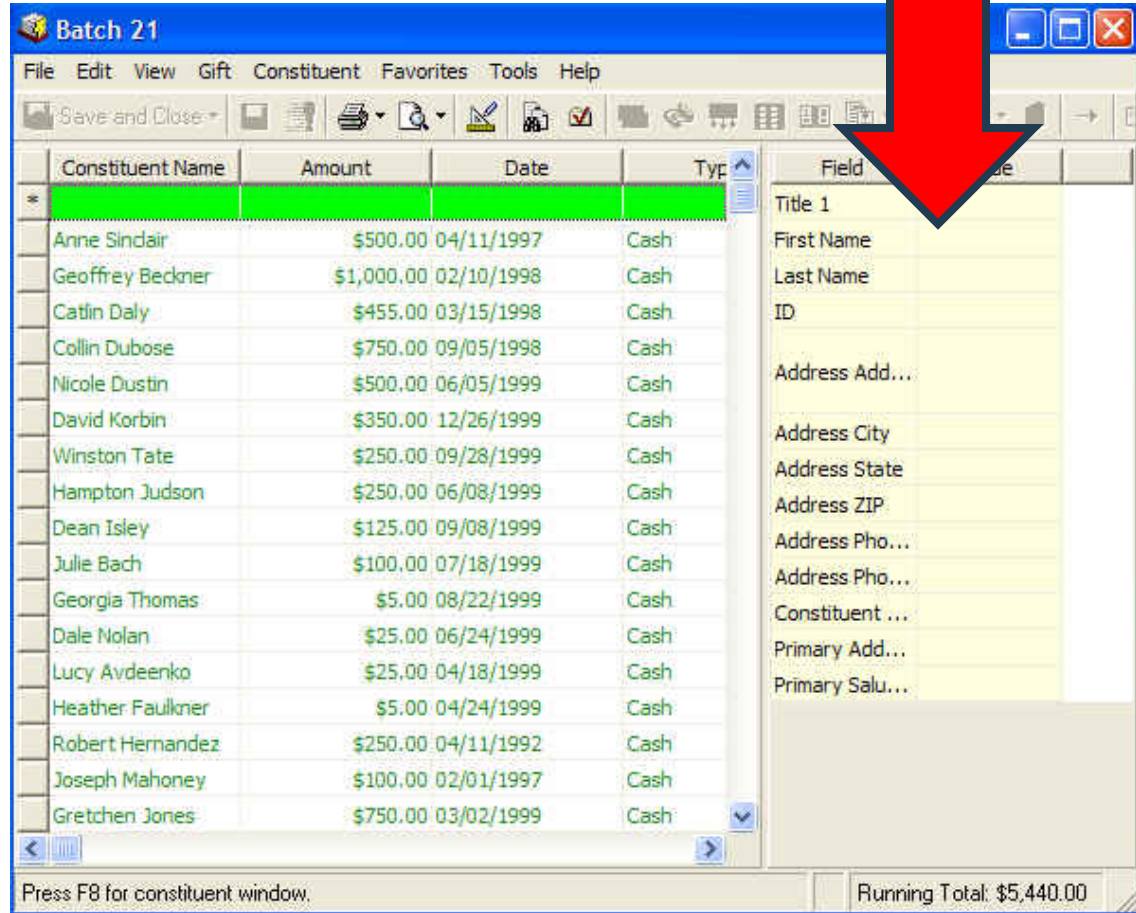
- Identify data more quickly and easily
- Reduce or eliminate data-entry mistakes
- Differentiate between various gift types via color schemes
- Confirm visually that the gift is properly linked, matched, or soft-credited



To edit the color legend, while in an open batch, select View, Legend from the menu bar

9. Data Entry – *Constituent Window:

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

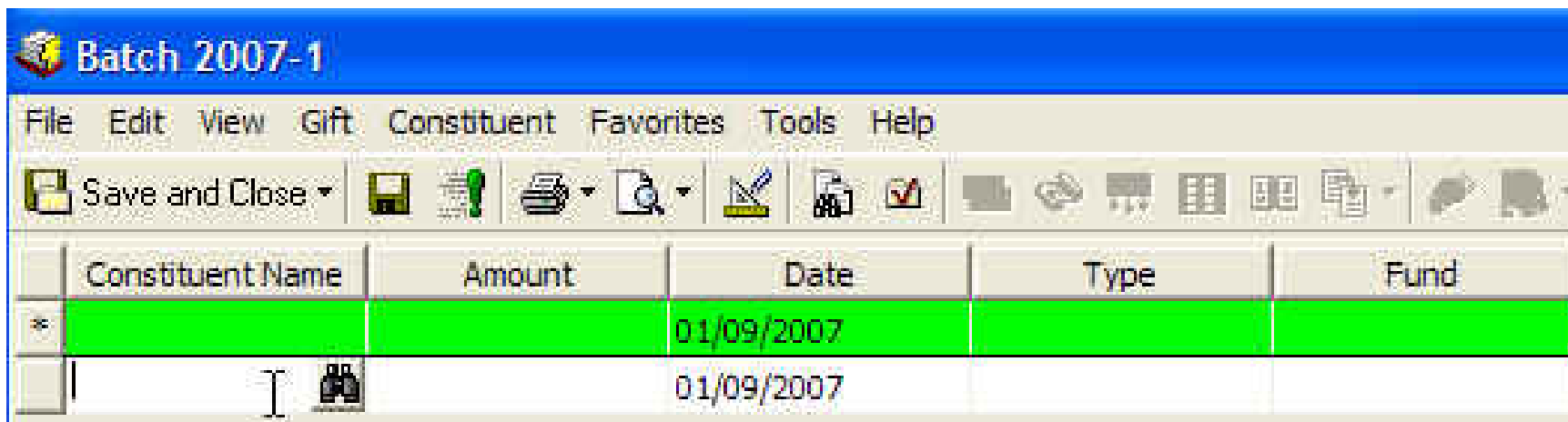


***To see the Constituent Window, select View, Constituent Window from the menu bar of the open Batch.**

***To define the fields used in the window, select Constituent, Define Constituent Fields from the menu bar.**

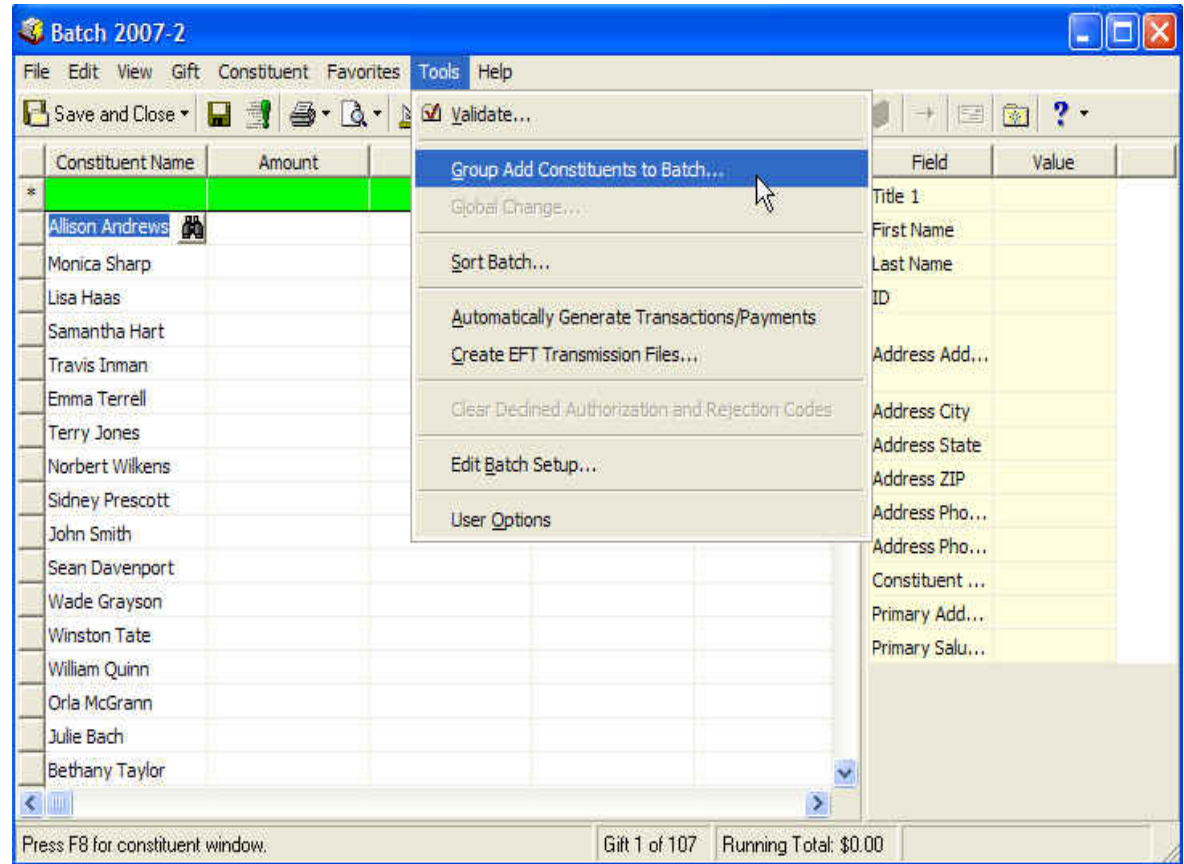
10. Data Entry - Another way to use defaults - the Default Row:

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



11. Data Entry – Group adding constituents:

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



To group add donors by query, select Tools, Group add constituents to batch from the menu bar

12. Data Entry – Gifts

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



Most accessed from menu bar!

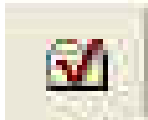
13. Miscellaneous Batch Tools

- **Goto** – allows you to jump directly into a constituent's full record from batch



- or, select Gift, Goto from the menu bar

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



- or, select Tools, Validate from the menu bar

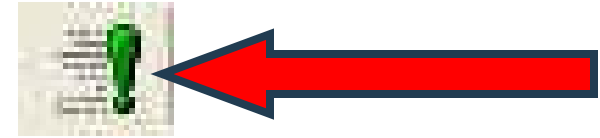
- **Duplicate Searches** – used to verify that there are no duplicates within the batch itself (does not check main database for duplicates)



- or, select Constituent, Duplicate search for Batch

14. Committing the Batch

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



Commit Gift Batch

1: General 2: Payments

Step 1: Enter general information

Validate batch before committing

Create gift query of committed gifts

Create a new batch of exceptions:

Create control report: Summary [Preview] [Print]

Delete batch after committing

Automatically apply gifts to pledges and recurring gifts

Only apply gifts to pledges and recurring gifts with the same fund(s)

Batch Statistics

Running number of gifts:	10	Number of matching gifts:	0
Running amount:	\$1,000.00	Matching gift amount:	\$0.00
Created on:	10/03/2001 12:54:34 ...	Times committed:	0
Last changed on:	01/09/2007 3:01:03 PM	Last committed on:	
Created by:	Supervisor		

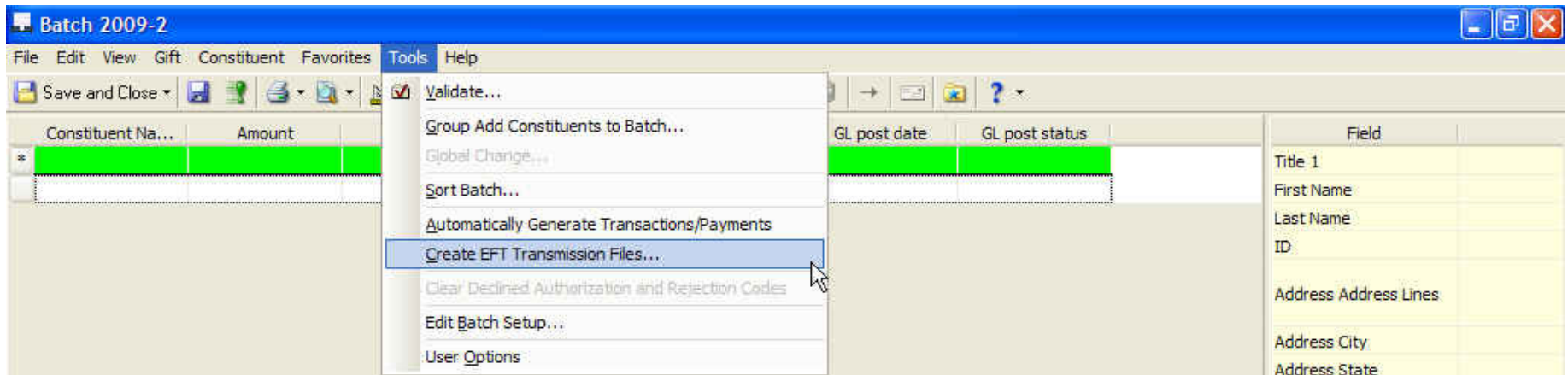
< Back Next > Cancel Commit Now

15. Batch Specific Reports

- **Entry Log** – lists information for all or selected batches in your database. It contains the batch description number, the running number of constituents in a batch, and the status of a batch. To print the report, select **File, Print, Batch Log** from the menu bar of a gift batch.
- **Deposit Ticket-** select **File, Print, Deposit Ticket** from the menu bar of a gift batch. When you select to print the Deposit Ticket for a batch, you can select to include or exclude specific batches by clicking the **Include** button. You can print or preview the deposit ticket for a batch when the **Include batch for bank depositing** checkbox is marked on the Gift Batch Setup screen.
- **Validation Report** – print to keep a record of all constituents entered in a batch. This report is useful to make sure all the constituent data was correctly entered in the batch. To print the Validation report, select **File, Print, Validation Report** from the menu bar.
- **Pre-Transmission Report (EFT Only)** - select **File, Print, Pre-Transmission Report** from the menu bar of a gift batch.
- **Credit Card Report-** select **File, Print, Credit Card Report** from the menu bar of a gift batch. Specify the batches to include in the report and by what criteria you want to break the report down.
- **Control Report** - includes the constituent name, date, and all other constituent batch fields entered in the batch. You can access the Commit Constituent Batch screen to mark the **Create control report** checkbox by selecting **File, Commit Completed Batch** from the menu bar of a batch.

16. Electronic Funds Transfer Processing

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



How Blackbaud Can Help

Take advantage of your Support Resources!

Email resupport@blackbaud.com or call 1-800-468-8996!

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

For more information please contact your account manager.

Blackbaud®

Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

Thank You for joining us!

