

Blackbaud

Raiser's Edge Online User Clinic:

Mail Merging in RE7

Wednesday – March 18, 2009

Blackbaud Representative:

Ron Rivers – **Solutions Engineer**



Make the world a better place.

Agenda



- Welcome and Introductions
- Blackbaud News and Updates
- Support Resources
- How Blackbaud Can Help
- *Mail Merging in Raiser's Edge* Presentation
- Q & A

Blackbaud News and Updates

Upcoming Online User Clinics

- ◆ Mail Merge 11/18/2009
- ◆ Query in The Raiser's Edge 7 4/15/2009
- ◆ Batch Entry & PCI Compliance 5/20/2009
- ◆ 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
- ◆ 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 4/9/2009
- ◆ PaperSave for the Raiser's Edge 4/22/2009
- ◆ Intro to Financial Edge for Raiser's Edge Customers 4/14/2009
- ◆ Building and Managing an Interactive Website 4/7/2009
- ◆ Blackbaud NetCommunity for... throughout March
 - Cause-Based and Service Organizations
 - Faith-based Organizations
 - Healthcare organizations
 - Higher Education Institutions

Web Seminar schedule:

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Questions: please email webseminars@blackbaud.com.

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 7.90

- PCI compliance
- Currently in beta – early 2009 release

www.blackbaud.com – Company > PCI Compliance > Frequently Asked Questions

Blackbaud News and Updates

Upcoming Online Trainings

- **Advanced Importing** 4/23 and 4/29 (3 hours)
- **Analytical Reporting** 4/17 and 4/23 (3 hours)
- **Donor Acknowledgement Letters and Receipts** 4/9 and 4/17 (4 hours)
- **Database Doctor** 4/3 and 4/6 (3 hours)
- **Export** 4/6 and 4/17 (3 hours)
- **Managing Solicitors** 4/24 (6 hours)
- **Planned Giving in The Raiser's Edge 7** 4/9 (2 hours)
- **Query Essentials** 4/1 and 4/13 (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

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!

Support Resources

- Alerts
- Knowledgebase
- FAQs – product specific
- Forums
- Technical Bulletins
- Downloads
- Newsletters
- User Guides

Support Resources: www.blackbaud.com – [Support](#)

How Blackbaud Can Help

Take advantage of your Support Resources!

Special pricing available through the end of March 2009:


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

For more information please contact your account manager.



Mail Merging in RE7 :Work Smarter... Not Harder!

Hosted by: William Jankins
Solutions Engineer/ Product Expert



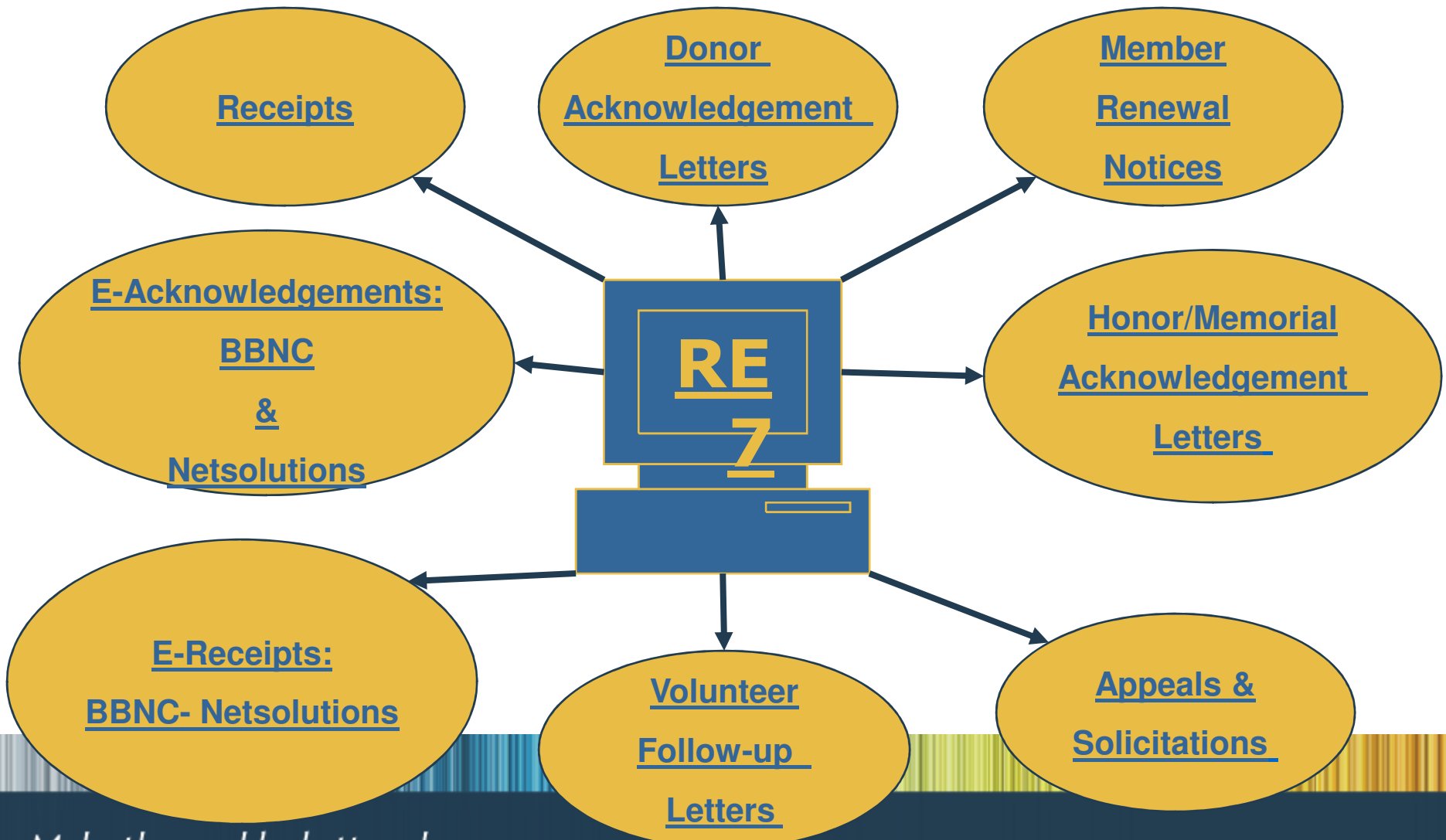
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Mail Merging in RE7

1. **Common Tasks**
2. **Simple Mail Merge**
3. **Conditional Mail Merge**
4. **Using Logical Dates**
5. **Using the Home Page**

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1. Common Mail Merge Tasks



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2. Simple Mail Merge

Used in Export or Mail modules.

Knowledgebase tips:

BB151232 – Simple Versus Conditional Mail Merge

BB92696– How to create a Simple Mail Merge

BB97660 – Simple Mail Merging in Export

A decorative horizontal bar at the bottom of the slide, composed of many thin vertical lines in various shades of blue, green, and yellow.

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3. Conditional Mail Merge

Used in Export or Mail modules:

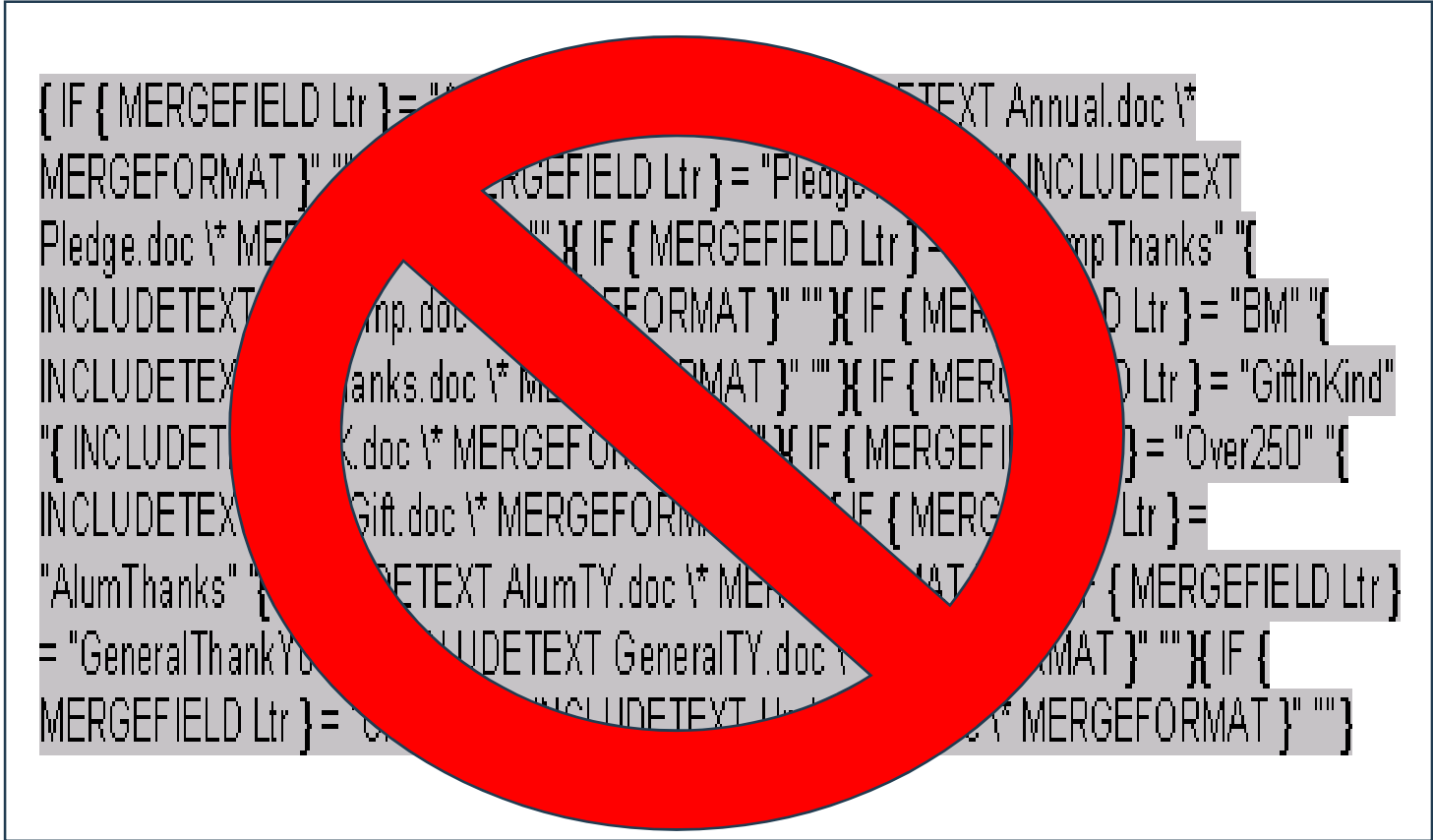
Knowledgebase tips:

BB151232 – Simple Versus Conditional Mail Merge

BB97661 – How to create a Conditional Mail Merge

BB97809 – Conditional Mail Merge in Export

Acknowledging Donors – Mail Merge



Acknowledging Donors – Mail Merge

See BB97661 or access the [The Raiser's Edge & Microsoft Office Integration Guide](#)

(Help, User Guides) for more information.

Donor Acknowledgement Letters for Robert

File Edit Favorites Help

Send to Word merge wizard

6: Ind. Address 7: Org. Address 8: Postal 9: Format

1: General 2: Fields to Include 3: Filters 4: Gift Types 5: Attributes

Include... Robert Hernandez

Include Gifts with these Dates

Date to use: Gift date

Date: <Specific range> Start: 01/14/2004 End: 01/14/2004

Soft Credit Gifts To

Donor

Soft credit recipients Use distribution on gift

Both Use distribution on gift

Include these Constituents

Inactive constituents

Deceased constituents

Constituents with no valid address

Credit Matching Gifts To

Donor MG Company Both

Create Constituent output query

< Back Next > Cancel Export... Merge...

4. Use Smart Dates & the Home Page

Include Gifts with these Dates

Date to use: Gift date

Date: This month

Edit Field Criteria

Gift Date

Operator: equals

Date: <Specific date>

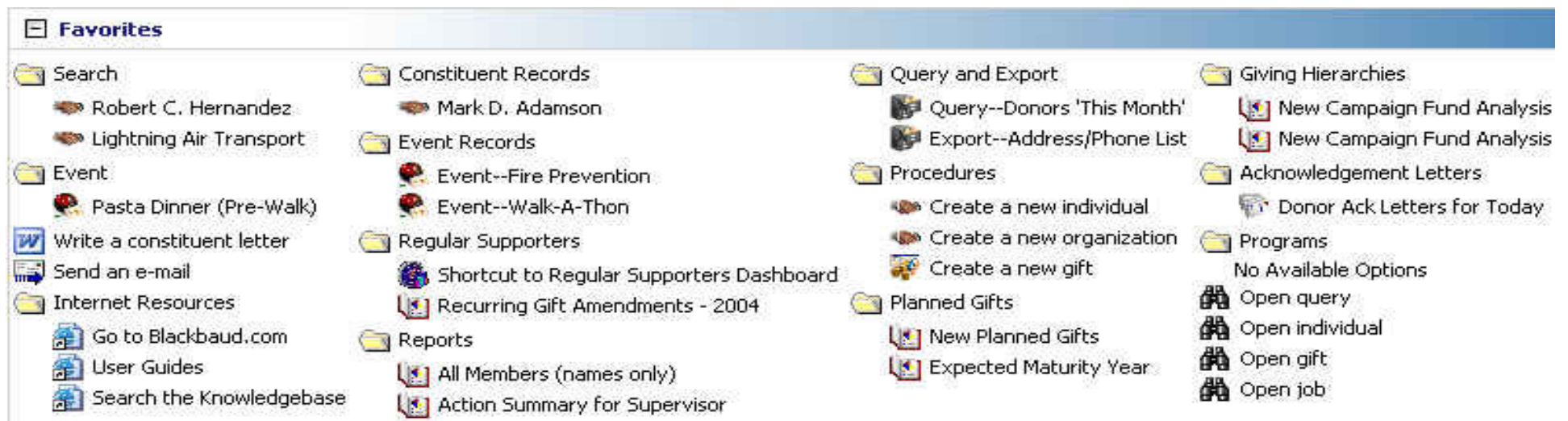
Value:

- Tomorrow
- This week
- Last week
- Next week
- This month
- Last month
- Next month
- Month to date

- Give others access to the information they need
- Improve internal communication
- User just needs to know how to click a link

5. Homepage – Customize your Home Page!

- Access commonly used tasks
- Organize in folders
- One-click access to information



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Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

Thank You for joining us!



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