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**> Shared Client Documents:
Policies and Procedures**

**RAISER'S EDGE USER MANUAL
Advancement – Raiser's Edge
Users Manual _____ Advancement 3
Version 1.2 April 2012 Introduction
Workbook Goal The goal of this**

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guide is to give a new Raiser's Edge user a complete understanding of the system, how all the modules work together, and what processes and procedures to follow in order to perform their job duties. Intended Audience

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Raiser's Edge with these great how-to videos. Perfect for those who want to see quick demos of Raiser's Edge functionality.

www.blackbaud.com

Raiser's Edge is a pretty user-friendly platform, but with as many

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features and customization options as it has, your team would be naive not to expect a learning curve. To guarantee your nonprofit staff is confident using the Raiser's Edge system, develop a training plan by asking yourself the following questions:

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Raiser's Edge - How to Create a Donor Profile

***Have questions or need to quickly
get up to speed? Check out these
help files, guides, videos,
walkthroughs, and other assistance
for step-by-step instructions and***

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***detailed information for all your
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The Raiser's Edge user guides
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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.

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***Category Topics - Blackbaud
Community
Blackbaud***

***Raiser's Edge: The Smart
Nonprofit's Before-You-Buy Guide***

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A 4 minute lesson on how to build a

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donor profile report. Handy tip for a development director or major gift officer on the go.

***Program Basics Guide -
blackbaud.com***

***Logging Off of The Raiser's Edge:
It is important to log out each time***

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you finish using Raiser's Edge. The Foundation has a limited number of concurrent user licenses for Raiser's Edge. If you are logged into Raiser's Edge but not actually using the system, it may prohibit other users from signing on.

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***Prospect Data Entry Guide -
Blackbaud
www.blackbaud.com***

***Raiser's Edge Policies And
Procedures Manual
Raiser's Edge Beginner Training
Guide I. What is Raiser's Edge?***

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Raiser's Edge is a program that Advancement uses to manage its Alumni/Donor database. Primary records that Raiser's Edge calls "constituents" are added for individuals and organizations that have certain relationships with Clemson.

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maintains the Raiser's Edge internal
user policy manual. MANAGER –
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SERVICES/RAISER'S EDGE and
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and maintain the RE policies and procedures manual. The Raiser's Edge® is a flexible database designed to serve a

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With Raiser's Edge NXT, you can

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view and manage your Raiser's Edge data through both a web-based interface via any browser or device and the database view accessed through Citrix. The web interface provides an elegant, friendly view of your data and enables people at your nonprofit —

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Raiser's Edge Beginner Training Guide

User Options for the Prospect Tab

User options are preferences you set that affect how The Raiser's Edge looks and runs on your workstation. User options are login-

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specific, which means if you log into any workstation using your password, your preferences are active on that workstation.

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