The Raiser's Edge®

KNOW THE BASICS:
- 66% of clients have 4 or fewer users (25% have 1-2 users); large or small organizations
- Customizable at every level; flexible with what you want to see and how you want to see it
- Endless reporting capabilities (summaries, data reports, dashboards, custom reports)

THE HOMEPAGE:
- Very customizable; save favorite functions; queue functions for easy access
- Displays actions (to-do list tasks that can be assigned to yourself or other users)
- Configure dashboards to display on homepage

STANDARD FUNCTIONALITIES

Records: Houses records for constituents, gifts, actions, campaigns, funds, and appeals

Query: Segmentation tool that is often a good starting point; a way of asking a question of your database (ex: how many donors do we have that live in this state that have donated this much?)

Export: A way to extract and actually pull information from the database into various formats

Reports: There are many built in and you can create custom reports; customizable and flexible

Mail: Variety of mail functions built in; documents can be generated right from the system

Batch: Express data entry tool if you have lots of new records to enter; spreadsheet format

Admin, Configuration (security and administrative) **and Dashboards** (another way to view data)

CONSTITUENCY RECORDS:

Bio: Record basic information, spouse, affiliations, credit cards (encrypted in the back-end)

Addresses: Can store multiple addresses and can be designated as seasonal

Relationships: Track any relationships with a person or organization); bank or financial information; education information; assigned solicitors. Relationship trees show every relationship that branches out from the constituent (you can see how the constituents in your database are related and how they know one another)

Appeals: Track what types of appeals you are sending to this person and the results of those appeals

Notes: Document any free-form notes; can classify by type of note

Gifts: Track all the gifts that come from a constituent; can open up a particular gift record, which has all details about a person's giving. You can see the solicitors tied to the gift, track match gifts, track tributes and more.

Attributes - User defined fields by which you can group and define your information; track anything!

Media: Store items such as photographs, documents, video, audio, and presentations

Actions: Track something you've done in the past or present with a constituent or perhaps something you want to set a reminder for yourself (or any other users) to do in the future; delegation tool