HELPING YOUR SOLICITORS LEVERAGE THE GIVING SCORE

The Raiser's Edge® 7.92

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your passion › our purpose

Blackbaud powers the business of philanthropy from fundraising to outcomes.

AGENDA

- Create a solicitor dashboard
- Add Giving Score queries to a dashboard
- Create a Giving Score query for a solicitor
- Share a dashboard
- The solicitor perspective

THE GIVING SCORE

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TO ADD GIVING SCORE QUERIES TO A DASHBOARD

1. Open the dashboard that you want to modify.
2. Click **Customize.**
3. Under **Available Panels,** select **Giving Score Queries** in the **Giving Score** category.
4. Click **Add.**
5. Select the **Giving Score Queries** panel under **Selected Panels** and then click **Edit.**
6. Customize the panel as needed and then click **OK.**
7. Click **OK** to close the Customize Dashboard window.

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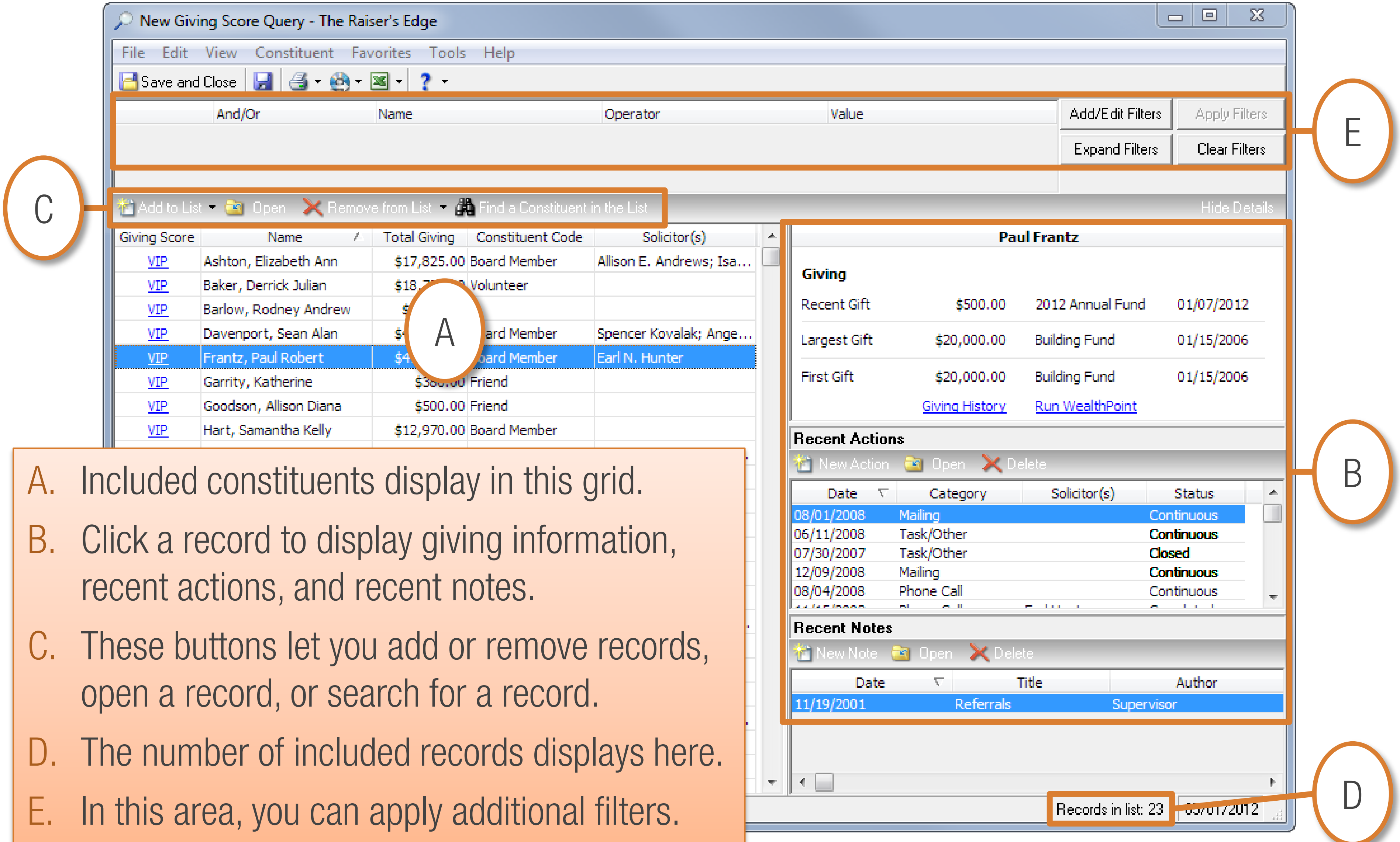
TO CREATE A GIVING SCORE QUERY ON THE DASHBOARD PANEL

1. On the dashboard panel, click **Add New Query.**
2. Select the Giving Scores that you want to include. If necessary, select the **No Score** checkbox to include constituents that do not have scores.
3. Click **OK.**
4. Add and remove records as needed.
5. Apply filters as needed.
6. Click **Save.**
7. Enter the query details and then click **OK.**

NAVIGATING THE GIVING SCORE QUERY



A. Included constituents display in this grid.

B. Click a record to display giving information, recent actions, and recent notes.

C. These buttons let you add or remove records, open a record, or search for a record.

D. The number of included records displays here.

E. In this area, you can apply additional filters.

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TO FILTER THE QUERY LIST

1. Click **Add/Edit Filters.**
2. Under **Available Fields,** click the field you want to use as a filter.
3. Click **Select.**
4. Define an operator and value.
5. Click **OK.**
6. Repeat steps 2–5 as needed to define additional criteria.
7. If necessary, update the criteria order and combining operators—And, Or, and parentheses.
8. Click **OK.**
9. Click **Apply Filters.**

TO SHARE A DASHBOARD

1. Open the dashboard that you want to share.
2. Click **Sharing.**
3. Select the security groups that you want to grant access to the dashboard.
4. Click the right arrow > button.
5. Click **OK.**

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SOLICITOR TOOLS – ACCESSING THE SOLICITOR DASHBOARD

1. On the navigation bar, click **Dashboard.**
2. Click **Select Shared Dashboards.**
3. Select the dashboard that you want to display.
4. Click **OK.**

SOLICITOR TOOLS – DEFINING PANEL PROPERTIES

1. On the dashboard panel, click the Properties button.
2. Click **Properties.**
3. Modify the properties as needed.
   - **Campaign Summary panel:** select the campaigns that you want to monitor.
   - **Solicitor/Team Campaign Performance:** select the campaign that you want to monitor.
   - **Constituent Action List:** Select your name in the **Assigned to** field.
   - Define other properties as needed.
4. Click **OK.**

SOLICITOR TOOLS – TO ADD CONSTITUENTS TO THE QUERY

To add one record at a time:

1. Click **Add to List.**
2. Click **One Constituent.**
3. Search for the record that you want to add.
4. Select the record.
5. Click **Open.**

To add a group of records:

1. Click **Add to List.**
2. Click **A Group of Constituents.**
3. Search for the query that you want to add.
4. Select the query.
5. Click **Open.**

SOLICITOR TOOLS – TO REMOVE RECORDS FROM THE QUERY

To remove one record at a time:

1. Select the records you want to remove.
2. Click **Remove from List.**
3. Click **Selected Constituents.**
4. Click **Yes** to confirm.

To remove a group of records:

1. Click **Remove from List.**
2. Click **A Group of Constituents.**
3. Search for and select the query that contains the constituents you want to remove.
4. Click **Open.**
5. Click **Yes** to confirm.

SOLICITOR TOOLS – TO FILTER THE QUERY LIST

1. Click **Add/Edit Filters.**
2. Under **Available Fields,** click the field you want to use as a filter.
3. Click **Select.**
4. Define an operator and value.
5. Click **OK.**
6. Repeat steps 2–5 as needed to define additional criteria.
7. If necessary, update the criteria order and combining operators—And, Or, and parentheses.
8. Click **OK.**
9. Click **Apply Filters.**

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SOLICITOR TOOLS – TO ADD AN ACTION

1. Click the constituent for which you want to add the action.
2. Under **Recent Actions,** click **New Action.**
3. Enter the necessary details.
4. Click **Save and Close.**

SOLICITOR TOOLS – TO ADD A NOTE

1. Click the constituent for which you want to add the note.
2. Under **Recent Notes,** click **New Note.**
3. Enter the necessary details.
4. Click **Save and Close.**

WANT TO LEARN MORE?

Check out these training offerings to learn more about solicitor management and Giving Score queries:

Free Videos		Online Instructor-Led Classes	
Introduction to the Giving Score in The Raiser's Edge	Watch Now	Working with Giving Score Queries (free with Learn More)	Register Now
Scoring Your Database	Watch Now	Managing Solicitors (free with Learn)	Register Now
Building a Giving Score Dashboard	Watch Now	Building Relationships with Action Tracks (free with Learn More)	Register Now
Adding Giving Score Queries in Dashboard	Watch Now	Report and Dashboard Essentials (free with Learn)	Register Now
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Focusing Your Fundraising Efforts: Working with Your Fan List

August 16, 2 PM Eastern

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https://www.blackbaud.com/re-new-release