

► INCREASE GIVING BY MATCHING SOLICITORS TO CONSTITUENTS

The Raiser's Edge® 7.92

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AGENDA

- Evaluating solicitor assignments
- Assigning solicitors in a Giving Score query and on a constituent record
- Adding actions for solicitors
- Reviewing and reporting solicitor information

ASSIGNING SOLICITORS

When would you assign a solicitor?

- Staff members need to track constituent activity.
- Staff members need to personally cultivate the relationship, communications, and solicitations for select constituents.

Who would you consider assigning?

- Fundraising and administrative staff
- Board members or other constituents designated to raise money from other constituents

TO ASSIGN A SOLICITOR IN A GIVING SCORE QUERY

1. Open the Giving Score query.
2. Click in the **Solicitor** column.
3. Click the binoculars  button.
4. Search for the solicitor that you want to assign.
5. Click the solicitor and then click **Open**.

TO ASSIGN A SOLICITOR ON THE CONSTITUENT RECORD

1. Open the constituent record.
2. Click the **Relationships** tab.
3. Clicked **Assigned Solicitors**.
4. Click **New Assigned Solicitor**.
5. In the **Solicitor** field, click the binoculars  button.
6. Search for the solicitor that you want to assign.
7. Click the solicitor and then click **Open**.
8. Enter additional details as needed.
9. Click **Save and Close**.

TO ADD AN ACTION IN A GIVING SCORE QUERY

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

TO REPORT SOLICITOR ASSIGNMENTS

- Reports Examples
 - Action reports: Action Detail Report, Tickler Report
 - Group (sort) by solicitor
 - Campaign, Fund, Appeal Reports
 - Filter by solicitor
- Dashboard Panel Examples
 - Solicitor Status Panel
 - Solicitor Query Panel
 - Displays the results for most query types

HOW ELSE CAN YOU BENEFIT FROM GIVING SCORE QUERIES?

- Review solicitor assignments
- Add new prospects
- Add or edit actions
- Screen select constituents using WealthPoint® for The Raiser's Edge®
- Use the list to filter reports and mailings

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	Managing Solicitors (free with Learn) Register Now
Adding an Action in a Giving Score Query Watch Now	Working with Giving Score Queries (free with Learn More) Register Now
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Join us for our next webinar:

Helping Your Solicitors Leverage the Giving Score

July 13, 2 PM Eastern



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