➤ FOCUSING YOUR FUNDRAISING EFFORTS: WORKING WITH YOUR VIP LIST

The Raiser's Edge® 7.92

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your passion ➤ our purpose

AGENDA

- What is a VIP?
- Building Giving Score queries
- Managing VIPs in Giving Score queries

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THE GIVING SCORE

VIPs:

- High affinity and high capacity to give
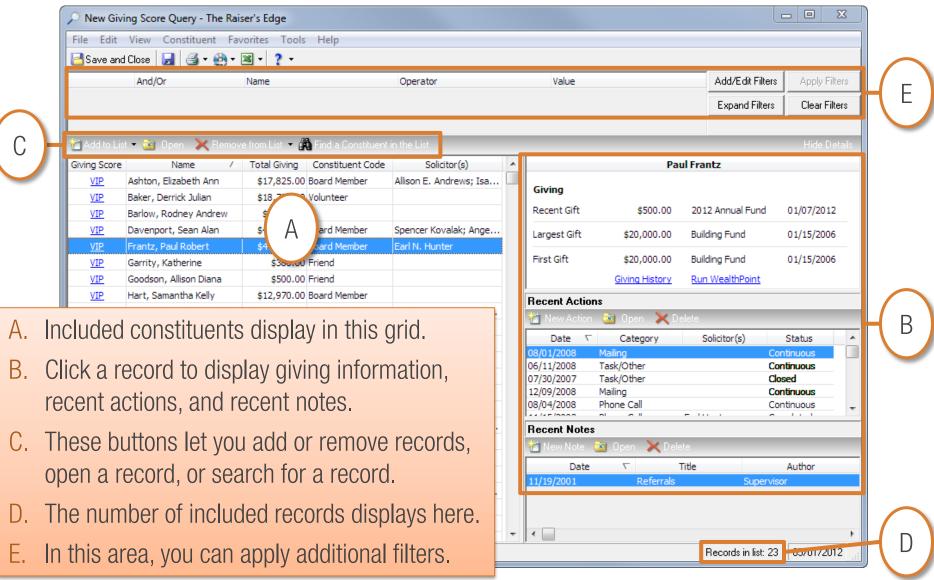- Good source for major gifts and planned gifts

Best Practices:

- Use high-touch communication, such as personalized mailings, event invitations, and in-person meetings.
- Assign a dedicated solicitor.
- Cultivate and steward the relationship.
- Personalize mailings and proposals.
- Identify other VIPs, such as organizations or individuals with addresses outside the United States.

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TO CREATE A GIVING SCORE QUERY

1. On the navigation bar, click **Query.**

2. Click **New Query.**

3. In the **Query type** list, click **Giving Score.**

4. Click **OK.**

5. Select the Giving Scores that you want to include. If necessary, select the **No Score** checkbox to include constituents that do not have scores.

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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 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.**

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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.

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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.**

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TO CHANGE A GIVING SCORE

1. In the **Giving Score** column, click the score that you want to change.
2. Click the **Use your score** option. Then, click the new score in the list.
3. Click **OK.**

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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.**

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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.**

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TO SAVE THE GIVING SCORE QUERY

1. Click **Save and Close.**

2. Enter a meaningful name that indicates the purpose of the query.

3. Enter a description if needed.

4. Select the checkboxes to let others use or modify the query.

5. In the **Create in** list, click the folder where you want to store the query.

6. Click **OK** on the two confirmation messages.

Note: Because Giving Score queries are static, keys are generated for the included records. The keys are not visible on records and are used only to indicate which records are included in the query.

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HOW CAN YOU USE YOUR QUERY?

- Create a dashboard to monitor and manage your list.

- Print the list for discussion at your next solicitor meeting.

- Use the list in mailings.

- Use the list to manage actions.

- Assign solicitors.

- Update scores as needed.

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WANT TO LEARN MORE?

Check out these training offerings to learn more about standard queries, query lists, and Giving Score queries :

Free Videos		Online Instructor-Led Classes	
Introduction to the Giving Score in The Raiser's Edge	Watch Now	Introduction to Query (free with Learn)	Register Now
Scoring Your Database	Watch Now	Working with Query Lists (free with Learn More)	Register Now
Changing the Giving Score on a Constituent Record	Watch Now	Working with Giving Score Queries (free with Learn More)	Register Now
Adding an Action in a Giving Score Query	Watch Now	No Learn subscription? Chat with a Blackbaud specialist or contact a training specialist at 800.468.8996, option 3.	

Take advantage of other great new features
Find all your 7.92 training here!

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Join us for our next webinar:

Increase Giving by Matching Solicitors to Constituents

June 14, 3 PM Eastern

Unlock your potential with The Raiser's Edge 7.92!

Bookmark the 7.92 Release page for easy access to FAQs, free webinars, videos, and download information.

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