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RE7ContactInformationPlugIn-2015
Contact Information Plug-In

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What Happened to my Data?

Because relationship-specific contact information between two constituents is no longer supported in *The Raiser's Edge 7.94*, additional phone numbers and email addresses may appear on your constituent records that were not there in 7.93.

For example, below is Ellen Crenshaw’s record in *The Raiser's Edge 7.93*. You entered a home email address for her: ellen.crenshaw@mail.com.

Below is Ellen’s relationship record with her son, Andrew, as accessed from Andrew’s constituent record. As you can see, Ellen has a relationship-specific email address with him, ECrenshaw@mail.net, that is used for any communication with him. In 7.93, this address only appears on Andrew’s relationship record with his mom, Ellen.
When you upgrade *The Raiser's Edge* to version 7.94, Ellen and Andrew’s relationship email address is now moved to the Bio 1 tab of Ellen’s record, due to the removal of relationship-specific contact information.
Recommended Use

When you use the Contact Information Plug-In, we recommend that you first resolve records in small increments so you become familiar with the way your data will appear after you take action; perhaps start with a query of constituents you are familiar with, to verify that the correct information is appearing each time. When you become comfortable, you can select a rule to apply to all of your remaining constituent records.

Contact Information Plug-In

You can use the Contact Information Plug-In to resolve the relationship phone numbers and email addresses that now appear on constituent records in 7.94, so they contain only the most accurate data.

The Contact Information Plug-In allows you to view all of the constituents in your database that had relationship-specific contact information added to their constituent records, and then lets you take action on that information to resolve it. For example, you can choose to mark all phone numbers that came from relationships as inactive so that only the constituent’s personal information is displayed by default.

You can choose to resolve constituents interactively in a grid, and take action on relationship contact information one-by-one, or select a rule to apply to all constituent records automatically.

“Resolve Contact Information Interactively” on page 4
“Resolve Contact Information Automatically” on page 8

Note: If you have already started to resolve relationship contact information for constituents, those records will not appear in the plug-in, or be resolved again if you process automatically.

To access the Contact Information Plug-In, you must have security rights to edit constituent phones, and have no constituency restrictions. If you do not have the appropriate security rights, contact your system administrator.

Resolve Contact Information Interactively

If you select to resolve contact information interactively, you must first pick a group of affected constituents to work with. You can select a query of constituents, or search for one specific constituent at a time.

After you select your constituents, they appear in a grid so you can clearly see who was affected, and what information now appears on their constituent record that came from a relationship in 7.93.

Resolve relationship contact information interactively

1. On the Rasier’s Edge bar, click Plug-Ins. The Plug-Ins page appears.
2. Click **Contact Information Plug-In**. The Contact Information Resolution screen appears.

3. Under **What constituents do you want to include?**, click **Include**, and select **All Records**, **Selected Records**, or **One Record**.
   - If you select **All Records**, you will resolve every affected constituent record in your database.
   - If you select **Selected Records**, the Open Query screen appears so you can search for and select a query of constituents to resolve.
   - If you select **One Record**, the Open screen appears for you to search for and select a specific constituent to resolve.

4. Under **How do you want to process the constituents?**, select **Interactive**.

   Your constituents will appear in a grid for you to resolve one-by-one. You will be able to see the contact information that was already on the constituent record before the upgrade to 7.94, and any contact information that was added to the Bio 1 tab from relationship records. You can then make decisions on how to handle the information from relationships.

   For information about how to process records automatically, see “Resolve Contact Information Automatically” on page 8.
5. **Click Continue.** The Contact Information Resolution grid appears so you can begin to resolve the selected constituents.

![Contact Information Resolution Grid](image)

6. The grid displays each constituent with contact information that needs to be resolved, and provides the information that was on the Bio 1 tab of their constituent record in 7.93 as a reference, as well as tells you which relationship the new information on their record came from.

You can use the **Came From** field to determine how that phone number or email address needs to be resolved based on where it originated. The information in this field represents its location in 7.93. For example, Ellen Crenshaw now has a second Home phone number on her Bio 1 tab in 7.94. Her rows in the grid show you the number that was already on her constituent record, as well as the new home phone number that came from her relationship record with Andrew Crenshaw.

![Contact Information Resolution Grid](image)

7. Take action on the contact information that came from a relationship record.

Select the row with the contact information to resolve, and click the dropdown arrow in the **Action** column.

![Contact Information Resolution Grid](image)
8. Select to mark the contact information as inactive, or to delete it from the constituent record. If you select to take no action, nothing will be changed on the constituent record.

9. After you take action to resolve each of your constituents in the grid, click **Process Grid**.

**Note:** Rather than manually take action on each constituent in the grid, you can click **Mark all relationship phones as** on the action bar, and select **Take no action**, **Mark inactive**, or **Delete**. After you select an action to take, click **Process Grid**. Every constituent in the grid will be resolved based on your selection, and you return to the Contact Information Resolution screen.

Here is an example of a constituent’s record before and after using the Contact Information Plug-In. Below is Ellen Crenshaw’s constituent record after the upgrade to **7.94**. As you can see, she now has two home phone numbers, and it is difficult to discern which number is accurate.

Using the Contact Information Plug-In, we have selected to mark the phone number from her relationship with Andrew Crenshaw as inactive. We do not want to lose that data, but we also do not want it to appear by default on her constituent record.

As you can see, she now only has one phone number displaying by default. This was the phone number that already existed on her record in **7.93**. You can click **Show inactive phones and emails** to display the phone number from her relationship with Andrew Crenshaw that we marked as inactive with the plug-in.

**Note:** This concept applies to all forms of contact information: phone numbers, email addresses, fax numbers, any relevant Web links that are on the constituent record, and any other form of contact information that may have been entered.

**Resolve Contact Information Automatically**

If you select to resolve contact information automatically, you must first pick a group of affected constituents to work with. You can select a query of constituents, or search for one specific constituent at a time.
After you select your constituents, you must then select a rule to apply to resolve them globally. For example, you can select to mark all contact information that came from relationship records as inactive so the Bio 1 tab only displays the constituent’s specific information.

- **Resolve relationship contact information automatically**
  1. On the Rasier’s Edge bar, click **Plug-Ins**. The Plug-Ins page appears.
  2. Click **Contact Information Plug-In**. Contact Information Resolution screen appears.

![Contact Information Resolution](image)

3. Under **What constituents do you want to include?**, click **Include**, and select **All Records**, **Selected Records**, or **One Record**.
   - If you select **All Records**, you will resolve every affected constituent record in your database.
   - If you select **Selected Records**, the Open Query screen appears so you can search for and select a query of constituents to resolve.
   - If you select **One Record**, the Open screen appears for you to search for and select a specific constituent to resolve.

4. Under **How do you want to process the constituents?**, select **Automatic**.
   When you choose to process automatically, you must then select a rule to apply to all of your selected constituents to resolve them globally. For example, after you select **Automatic**, you can then select to mark all contact information that came from relationship records as inactive so the Bio 1 tab only displays the constituent’s specific information.

5. Select a rule for how to resolve contact information that came from relationship records. You can either mark all contact information from relationship records as inactive, or delete contact information.

6. Select **Create constituent output query**. The output query gives you a list of all the constituents you selected to resolve.

7. Select **Create constituent exception query**. The exception query gives you a list of constituents that failed to process, such as if another user has a constituent record open that you are trying to process, and the plug-in is unable to resolve the record.

8. Click **Process**. The constituents you selected are resolved based on the rule you set for contact information. The process ends here if you chose to process constituents automatically, and not with the interactive grid.
Return to the Contact Information Resolution screen to select more records to process until you have resolved every constituent with contact information issues in your database.

**Note:** If you are processing a large number of records, it might take a few minutes to complete.

Here is an example of a constituent’s record before and after using the Contact Information Plug-In. Below is Ellen Crenshaw’s constituent record after the upgrade to 7.94. As you can see, she now has two home phone numbers, and it is difficult to discern which number is accurate.

Using the Contact Information Plug-In, we have selected to mark all contact information from relationship records as inactive. We do not want to lose that data, but we also do not want it to appear by default on constituent records.

After we click **Process**, here is the way Ellen’s record now appears in 7.94.
As you can see, she now only has one phone number displaying by default. This was the phone number that already existed on her record in 7.93. You can click Show inactive phones and emails to display the phone number from her relationship with Andrew Crenshaw that we marked as inactive with the plug-in.

**Note**: This concept applies to all forms of contact information: phone numbers, email addresses, fax numbers, any relevant Web links that are on the constituent record, and any other form of contact information that may have been entered.