

# The Raiser's Edge™

Constituent Data Entry Guide

**012218**

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# What Is In This Guide?



In the *Constituent Data Entry Guide*, you learn how to properly set up constituent records in your database. You learn how to manage biographical information; addresses; addressees and salutations; relationship information for individuals, organizations, funds, banks, and solicitors; attributes; notes; media items; and appeals. You also learn how to properly set up action records, assign solicitors, and set up solicitor teams. You can also learn about the following:

- “Relationship Tree” on page 162
- “Constituent Annotation” on page 194
- “Creating a Letter from a Constituent Record” on page 195
- “Converting Record Types” on page 217
- “Merging Constituent Records” on page 221
- “Merging Nonconstituent Relationship Records” on page 224

## How Do I Use These Guides?

*The Raiser’s Edge Enterprise* user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser’s Edge Enterprise* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about *The Raiser’s Edge Enterprise* by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.

# Introduction to Constituent Records



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Constituents are the individuals and businesses who support your organization by contributing time, money, and resources. You use *The Raiser's Edge* because your organization recognizes the importance of tracking these constituents. *The Raiser's Edge* combines easy-to-use features with an intuitive structure designed to meet the unique needs of your fundraising activities.

*The Raiser's Edge* uses *Records* to help you maintain information on all aspects of fundraising, such as constituents, gifts, campaigns, funds, and appeals. Think of *Records* as a filing cabinet. A filing cabinet gives you quick and easy access to the resources you need for an assortment of tasks.

In your organization, constituents may include donors, prospects, alumni, volunteers, and employees. The constituent record filing cabinet holds all kinds of constituent information, including biographical data, addresses, employment, giving histories, and so on. You can even store photographs or newspaper clippings about your constituents.

The documentation for *The Raiser's Edge* shows you how to select, locate, and use the right resources for a particular job. In this guide, for example, the Biographical Information chapter explains how to add, access, and work with the Bio 1, Bio 2, Org 1, and Org 2 tabs. This chapter introduces you to the basic concepts of a constituent record, gives a brief explanation about each tab, and defines words and phrases you need to know.

We recommend you read this guide thoroughly. The information in these pages provides a working knowledge you can carry over to all record types in *The Raiser's Edge*. The scenarios and examples throughout *The Raiser's Edge* documentation walk you step-by-step through various procedures. Hands-on experience is the best way to learn, so we encourage you to try these scenarios and procedures with your sample database.

## Frequently Used Terms

This section defines words and phrases you need to know as you work with constituent records. If you come across an unfamiliar term when you read this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

- Addressee.** An addressee is a format that defines how a constituent's name appears on envelopes, reports, and labels. It is usually formal, such as Ms. Joan Johnson or Mr. Thomas F. Stewart.
- Alias.** An alias is a secondary identification or acronym used to identify a constituent. For example, an alias for Business Information Systems may be BIS. You can use an alias to search for and access a record.
- Annotation.** An annotation is a quick reminder type of note added to a constituent record or an event record. An annotation is useful to let each user who opens the record know something important about the record. Some examples of annotations can be "Treat this constituent with care. She is a generous donor." and "Please see Dana Cone before editing this event record."
- Attribute.** An attribute stores the qualities, characteristics, and preferences you associate with a constituent. An attribute can identify a constituent's interests, dietary preferences, or special requests. Attributes can include hobbies, interests, activities, committees, and important dates.
- Constituent.** A constituent is an individual or business who contributes time, money, and resource to support your organization.
- Constituent code.** A constituent code defines the relationship a constituent has with your organization and why the individual is in your database, such as Board Member, Alumnus, Trustee, Current Parent, and Friend. Each constituent record in your database should have at least one constituent code. If you list multiple constituent codes, always list the most important active constituent code first. *The Raiser's Edge* recognizes the first code listed as the primary constituent code.
- Constituent ID.** A constituent ID is a unique alpha-numeric identifier assigned to every constituent record. These IDs can be manually assigned by you or automatically generated by *The Raiser's Edge*.
- Constituent record.** A constituent record is a record that maintains all aspects of an individual or organization, including biographical, relational, address, employment, and gift information.

**Link.** A link is a bond between two constituent records or between two or more parts of a record. Examples of constituent record links are the spouse relationship record, education relationship record, or primary organization (business) relationship record. An address can be “linked” to a constituent record. Matching gift information is “linked” to a constituent record. Links can also be “hyperlinks” that move you from one part of *The Raiser’s Edge* to another. For example, on the Configuration page, a list of links appears — **General, Tables, Addressees/Salutations**, etc. Click a link and go to that part of *Configuration*.

**Media object.** A media object is an electronic copy of something such as a newspaper clipping, letter, picture, or graph that pertains to a constituent and is stored on the Media tab of his constituent record. The Media tab uses Object Linking and Embedding (OLE) to store these newspaper clippings, letters, pictures, graphs, and other important data about your constituent. You can also store event-related media objects on the Media tab of an event record.

**Relationship.** A relationship is defined as a familial or social association with a constituent. In *The Raiser’s Edge*, you can track six different types of relationships for a constituent. These relationships are individuals (friends, family members, associates), organizations (businesses, clubs, employers), bank/financial institutions (credit, financial, and lending institutions), education/schools (schools, colleges, and universities), assigned solicitors (individuals or organizations assigned to secure donations from the constituent), and fund relationships (funds with which an individual or organization has a special affiliation).

**Relationship tree.** A relationship tree is a hierarchal view of a constituent’s relationships, as entered on the constituent record. From a constituent record, to quickly view relationship information for a constituent, click **Relationship Tree** on the toolbar or select **View, Relationship Tree** from the menu bar. All relationships entered on a constituent record from the Bio 1 or Org 1 tab and the Relationships tab appear in the Relationship Tree. In addition, to view all relationships for each entry in the Relationship Tree, you can expand the tree view.

**Salutation.** A salutation is a format that defines how to greet a constituent in correspondence. Depending on your relationship with the constituent and the type of mailing, a salutation can be formal or informal. For example, you may greet Mr. Thomas F. Stewart as Mr. Stewart in an appeal letter and as Tom in an alumni mailing.

**Solicit code.** A solicit code helps identify constituents as “exceptions to the rule” for your solicitors. These codes tell your solicitors that a constituent has certain rules or conditions the solicitors should follow such as “Do not phone at work” or “End of year mailing only”.

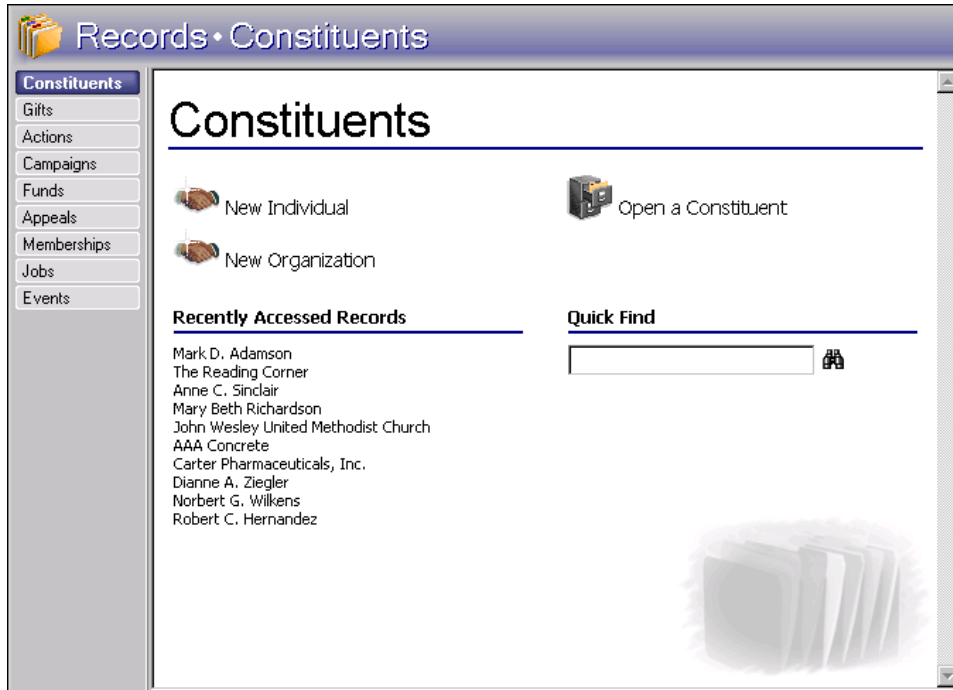
**Tree view.** A tree view is a hierarchical selection list used extensively in *The Raiser’s Edge*. A tree view differs from a standard list in that some or all of the items in the tree view contain branches represented by dotted lines. A tree view is usually found on the left side of the screen. When you select an item or branch from a tree view, the options for that item appear in a screen on the right. The Relationships tab has a good example of a tree view.

## Navigate in Constituent Records

**Note:** When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent’s matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen, accessed from the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.



Because records are such an important part of *The Raiser's Edge*, all record types exist in one area so you can quickly access them. Again, think of *Records* as a filing cabinet. You open a filing cabinet to pull out a record, or file. When you open *Records*, you can directly access (pull out) several record types, including constituent records. Click **Records** on the Raiser's Edge bar and click **Constituents**. The Constituents page appears.



**Tip:** You can also view recently accessed constituent records by selecting **File, Recently Accessed Constituents** from the menu bar of a constituent record.

You should consider the Constituents page the starting point for constituent records. From this page, you can add a new constituent record or open an existing one. The Constituents page also lists recently accessed constituent records and provides a quick find option.

## Access Constituent Records

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + S** on your keyboard to save a record or **CTRL + O** to open a record.

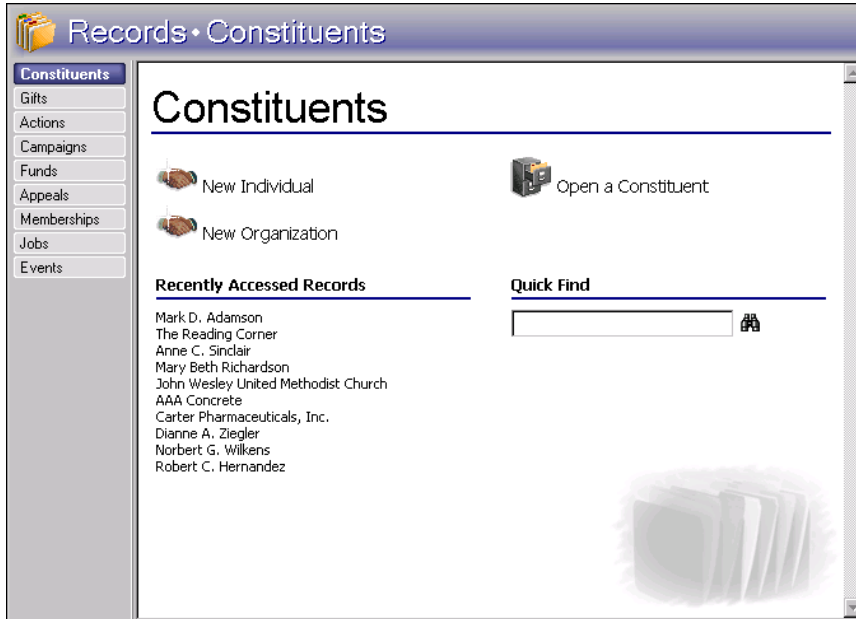
When we say “accessing a constituent record,” we are talking about opening an existing record. Every constituent you enter into *The Raiser's Edge* database has a separate constituent record. Once a constituent record is in the database, you can open the record from the shell **File** menu, from the **File** menu of an existing constituent record, and from the Constituents page of *Records*. We recommend opening records from *Records* because it allows the easiest and most complete access to all record types.

When you choose to open a constituent record, the Open screen for Constituents appears. You use this screen to tell *The Raiser's Edge* how to find the record. You can make the search wide-ranging or specific, depending on the criteria you select. If you have a small database, you may want to enter limited information, such as **Last/Org name** or constituent **ID**, and browse the records. If you have a larger database, you may want to be more selective and enter detailed information, such as **First name** or **City**.

The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results. If you are not sure how a word is spelled, you can also use wildcard characters. For more information about wildcards, see the Query chapter in the *Query & Export Guide*.

► **Open a constituent record from the Constituents page of Records**

1. On the Raiser's Edge bar, click **Records**.
2. Click **Constituents**. The Constituents page appears.



3. Click **Open a Constituent**. The Open screen for Constituents appears.

**Warning:** We recommend you use only one or two of the most useful criteria fields to search for a record. Because the search results must meet all criteria entered, too much criteria information may actually prevent you from locating the record.

- Under **Find Constituents that meet these criteria**, enter the criteria to use to search for the constituent. The criteria can include the constituent's name, ID, Social Security Number, membership ID, bank account number, address lines, city, state, ZIP, graduating class, and credit card number.

Find: Constituent Search using query: <Default>

Find Constituents that meet these criteria:

Last/Org name: Adamson Address lines:   
 First Name: City: Charleston   
 Constituent ID: State: SC   
 SSN: ZIP:   
 Membership ID: Class of:   
 Bank acct. no.: Credit card no:

Display inactive constituents  Check spouse name  Exact match only  Check nicknames   
 Display deceased constituents  Check aliases  Check contact name

**Note:** You can enter the first few letters or characters in the **Find Constituents that meet these criteria** fields if you do not know the correct spelling or number. For more information about how to use these fields, see the *Program Basics Guide*.

- After you enter your search criteria, click **Find Now**. The program searches your database and displays all constituents who meet the criteria. Again, depending on how limited or detailed your criteria are, the program may find one or multiple records.

Find: Constituent Search using query: <Default>

Constituent Name	Address Block	City, State	Constituent ID
Mark D. Adamson	125 Smokerise Way	Charleston, SC	3

Find Constituents that meet these criteria:

Last/Org name: Adamson Address lines:   
 First Name: City: Charleston   
 Constituent ID: State: SC   
 SSN: ZIP:   
 Membership ID: Class of:   
 Bank acct. no.: Credit card no:

Display inactive constituents  Check spouse name  Exact match only  Check nicknames   
 Display deceased constituents  Check aliases  Check contact name

1 record found.

**Note:** On the Open screen, if the criteria fields do not provide enough search criteria options, you can use the **Search using query** field to further filter the results appearing on this screen. For more information about how to use this field, see the *Program Basics Guide*.

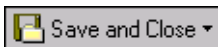
6. In the grid, select the constituent record to open.
7. Click **Open**. The constituent record appears.

8. After you view or edit the record, click **Save and Close** on the toolbar.

## Constituent Record Toolbar

**Note:** You can set up a user option so you can view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about how to set up this user option, see the General Options section of the User Options chapter of the *Program Basics Guide*.

The toolbar appears near the top of all record types, between the record's menu bar and the tabs. A toolbar is a row of buttons representing commands or functions for a record. You can use these buttons as alternatives to menu commands to save time during data entry. On a constituent record, for example, the toolbar commands include **Save and Close**, **Print**, and **Help**. For more information about toolbars and menu bars, see the *Program Basics Guide*.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record and open a new record.)



Save the record and keep the record open



Print the record



Preview the record before printing



Create a letter from the constituent record



Go to the first constituent record



Go to the previous constituent record



Go to the next constituent record



Go to the last constituent record



Go to records associated with this constituent record



Open a Gift Summary, Honor/Memorial Gift Summary, or a Solicitor Performance Summary



View relationship tree for this constituent



Make an annotation



Add this constituent record to your Favorites



Open the Properties screen



Validate, correct, and certify the constituent address. This toolbar button appears only when you have *AddressAccelerator*, our address correction data service.



Access help from online help files, user guides, online support, or the Blackbaud Web site



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only when you use the optional module *VBA for Advanced Customization*.



View the constituent record in Microsoft *Internet Explorer* in your custom view mode

## User Options for Constituent Records

In *The Raiser's Edge*, required fields appear in aqua by default. You can change the default color on the Color tab of User Options. For more information about how to set this and other preferences in User Options, see the *Program Basics Guide*.

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on any workstation you use. User options are login-specific, which means that if you log into any workstation with your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. To establish user options, select **Tools, User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options for your constituent records.

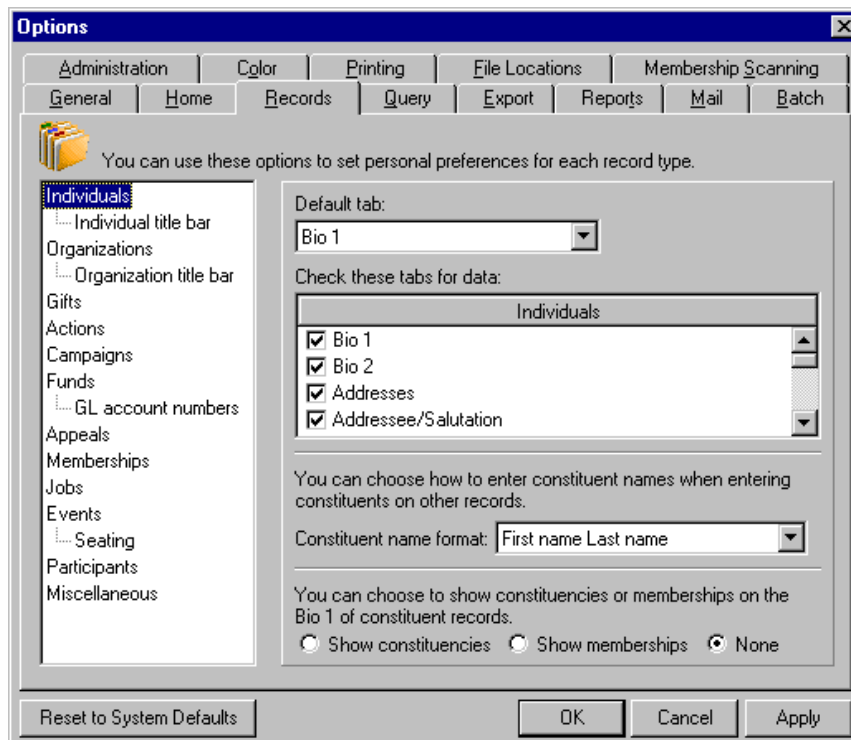
The proper configuration of *The Raiser's Edge* is important. You have your own preferences, but many of the configuration options can dramatically change the look and feel of the program. For example, you can define how constituent names appear in the constituent record title bar. You can select to have check marks appear on any tabs that contain data. To save time, you can also set tab preferences. If you use one tab most often, you can have the program display that tab automatically when you add or open a record.

For detailed instructions about how to set user options for constituent records, see the *Program Basics Guide*.

### ► Establish user options for Individual constituent records

**Note:** To establish user options, you can select **Tools, User Options** from the menu bar of an individual constituent record.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



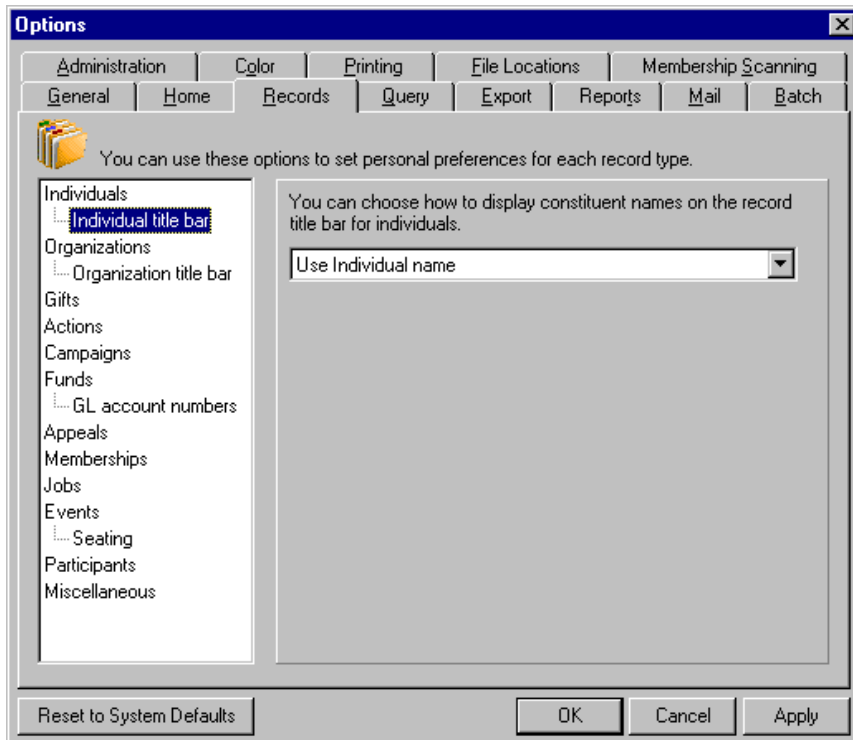
2. Select the Records tab.
3. From the tree view on the left, select **Individuals**. The Individual Constituent user option selections appear on the right.
4. In the **Default tab** field, select the tab to appear automatically when you add or open an individual constituent record.

**Tip:** To save time, in the **Individuals** box, you can right-click and **Deselect All** or **Select All** the checkboxes.

5. In the **Individuals** box, mark the checkbox by the tabs you want the program to search for data. On your individual constituent records, a red check mark appears on each selected tab when you add data.
6. In the **Constituent name format** field, select how to display individual names throughout the program — by Last name, First name; First name Last name; or Constituent ID.
7. Select whether to display constituencies, memberships, or none on the bottom of your individual records.

**Note:** If **Individual title bar** is not visible in the tree view, double-click **Individuals**. **Individual title bar** appears as a branch in the tree view.

8. From the tree view on the left, under **Individuals**, select **Individual title bar**. The title bar options appear on the right.



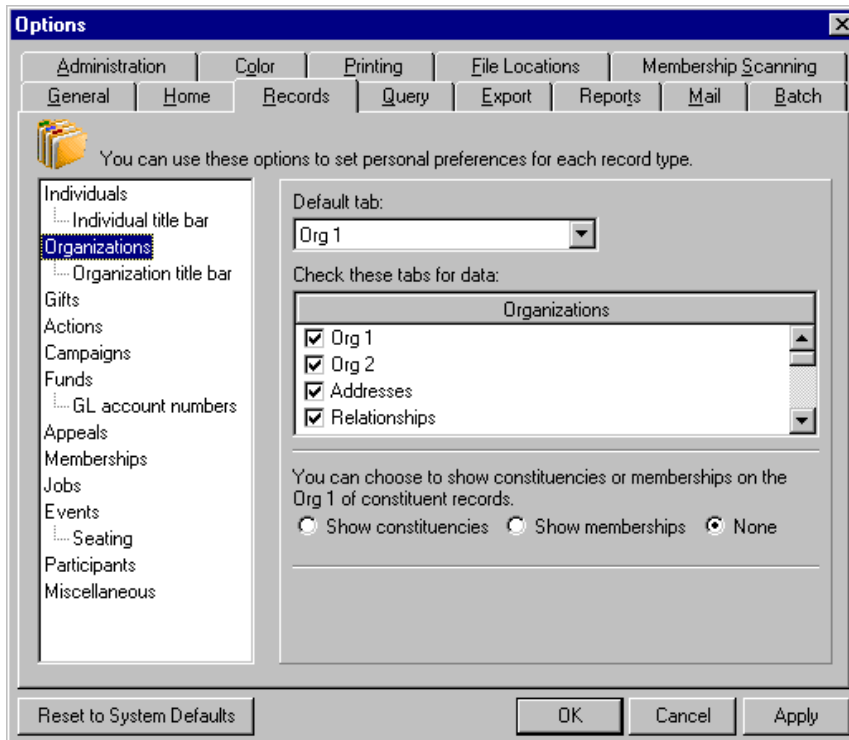
9. Select how to display constituent names on individual constituent record title bars — Use addressee from Individual (If you select this, additional fields appear so you can select to use a particular addressee if present on the record and select what addressee to use if your first choice is not present.); Use addressee from Configuration (If you select this, an additional field appears so you can make your selection.); or Use Individual name.
10. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

**Note:** To establish user options, you can select **Tools, User Options** from the menu bar of an organization constituent record.



► **Establish user options for Organization constituent records**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



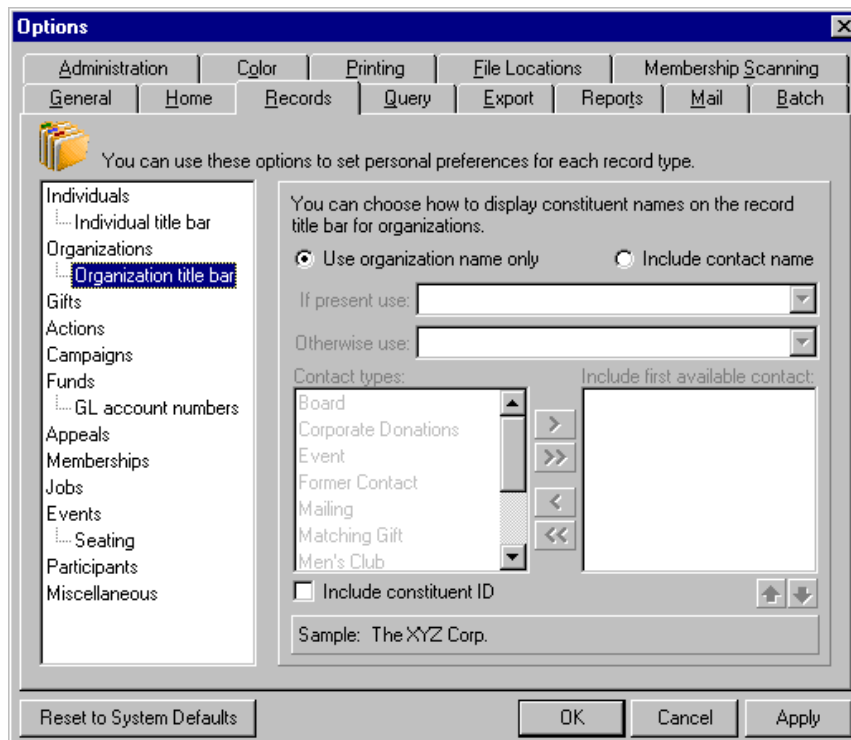
2. Select the Records tab.
3. From the tree view on the left, select **Organizations**. The Organization Constituent user option selections appear on the right.
4. In the **Default tab** field, select the tab to appear automatically when you add or open an organization constituent record.

**Tip:** To save time, in the **Organizations** box, you can right-click and **Deselect All** or **Select All** the checkboxes.

5. In the **Organizations** box, mark the checkbox by the tabs you want the program to search for data. On your organization constituent records, a red check mark appears on each selected tab when you add data.
6. Select whether to display constituencies, memberships, or none on the bottom of your organization records.

**Note:** If **Organization title bar** is not visible in the tree view, double-click **Organizations**. **Organization title bar** appears as a branch in the tree view.

7. From the tree view on the left, under **Organizations**, select **Organization title bar**. The title bar options appear on the right.



8. Select how to display constituent names on organization constituent record title bars — **Use organization name only** or **Include contact name**. (If you select this, additional fields appear so you can select to use a particular addressee if present on the record and select the addressee to use if your first choice is not present. You can then select what contact types to include.)
9. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

## Business Rules for Constituent Records

**Note:** From an individual or organization constituent record, you can run a duplicate search. Select **Constituent, Duplicate Search** from the menu bar of the record. From *Administration*, you can run a Duplicate Constituent Report. Click **Admin** on the Raiser's Edge bar. The Administration page appears. Click **Duplicate Constituents**.

Unlike user options, business rules affect all workstations that use *The Raiser's Edge*. You can set business rules only if you have security rights established from the **Security** link of *Administration*.

Business rules can make a big difference in how you use *The Raiser's Edge* and constituent records. For example, you can determine the criteria to use in duplicate searches, or have the program automatically generate constituent identification numbers. You can also set user-defined business rules that run when you open a constituent record. For step-by-step instructions about how to set business rules, see the *Configuration & Security Guide*.

# Understand Constituent Records

**Note:** You should set up a policies and procedures guide to specify how users at your organization enter data, maintain records, and perform various functions related to your *Raiser's Edge* database. By documenting your rules and guidelines for data entry, you help ensure the consistency of your data. Consistent data entry is crucial to the accuracy and validity of your reports, summaries, and queries. You can also use your manual as a training guide for new employees and volunteers. For more information, see the Data Entry Protocol chapter of the *Program Basics Guide*.

*The Raiser's Edge* uses a format called *Records* to group information together. When you add a constituent to *The Raiser's Edge* database, you create a new constituent record. This record stores information for the particular constituent, including biographical, relationship, media, gift, volunteer, event, and membership data. With information from the constituent record, you can easily get a clear and accurate picture of a constituent without having to gather data from several programs or sources.

The screenshot displays the Raiser's Edge software interface for a constituent record. The window title is "Allison E. Andrews". The menu bar includes File, Edit, View, Constituent, Letter, Favorites, Tools, and Help. The toolbar contains various icons for file operations and navigation. Below the toolbar are several tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressee/Salutations, Relationships, Appeals, Notes, and Gifts. The main area is divided into several sections:

- Biographical:** Last name: Andrews, First name: Allison, Middle name: Eve, Titles: Mrs., Suffixes: Ph.D., Nickname: Allie, Maiden name: Kersher, ID: 4, Gender: Female, SSN: 369-52-1114, Birth date: 07/25/1960, Age: 45, Marital status: Married, Spouse: Dustin S. Andrews, Solicit code: Do not phone at work.
- Preferred Address - Home:** Country: United States, Address lines: 4859 Philpot Lane, City: Minneapolis, State: MN, ZIP: 55403, DPC: (empty).
- Phones/Email/Links:** A table with columns: DNC, Type, Number/Email Address, Shared?.
 

DNC	Type	Number/Email Address	Shared?
	Home	612-555-0047	Shared
	Cell Phone	612-555-0029	Cannot be Shared
	Email	AEA@anet.com	Cannot be Shared
- This constituent:**
  - Is inactive
  - Is a solicitor
  - Gives anonymously
  - Has no valid addresses
  - Requests no email

At the bottom, there are buttons for Education, Business, and Bank, and a status indicator "Alumnus (05/1982 -)".

The information stored in a constituent record is used extensively throughout the program. Because constituent information is used to generate reports, queries, and mailings, you should enter data in as many constituent fields as possible. Accurate data entry is vital. To keep records consistent and help reduce errors, we strongly encourage you to set up data entry protocols for your organization.

When you add a new constituent record, you can add the constituent as an individual or organization. An individual is a person, and an organization is a company or business. Whether you decide to create an individual record or an organization record affects not only the tabs found on the record, but also how the record interacts with other areas of *The Raiser's Edge*. For example, you can create a query based on all constituent records, only individual constituent records, or only organization constituent records.

## Record Relationships

At first glance, records may seem to be independent of each other, and they can be accessed that way. However, you can link records to each other through a series of relationships. For example, an individual constituent record may have numerous addresses; perhaps a preferred address, business address, and vacation home address. The same individual may have one spouse (individual) relationship record. The types of relationships are discussed in “Relationships” on page 113, but here we discuss the kinds of relationships that can exist between records in *The Raiser’s Edge*.

### One-to-One

A one-to-one relationship occurs when a single link exists between two records. For example, the relationship between a constituent record and a spouse is a one-to-one relationship.



Constituent Record

One-to-One



Spouse Record

### One-to-Many

A one-to-many relationship occurs when a single record has links to many records. These records can have only one link to the single record. For example, the relationship between an individual constituent record and education records is a one-to-many relationship.



Constituent Record

One-to-Many



Education Records

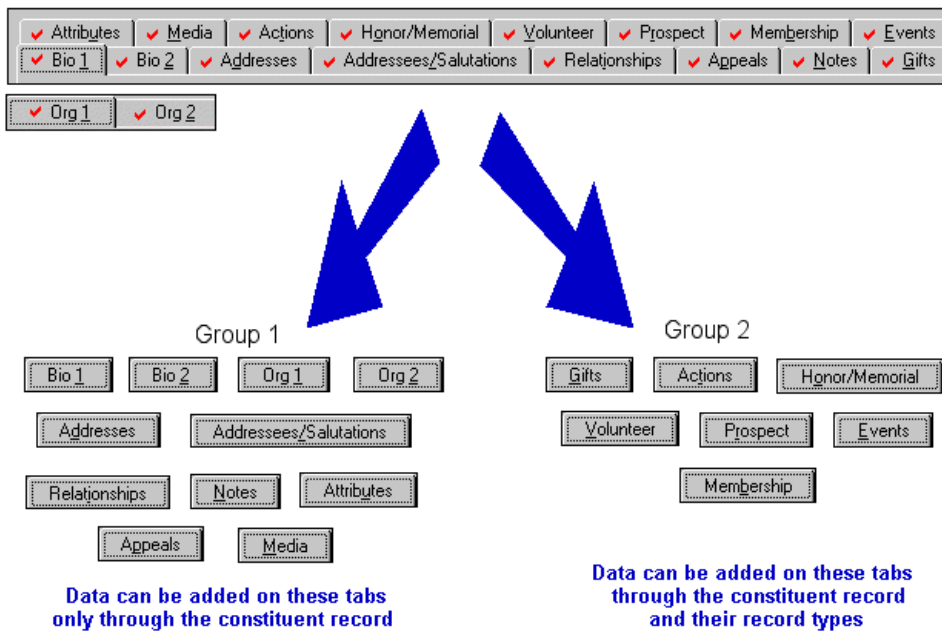
## Many-to-Many

A many-to-many relationship is similar to a one-to-many relationship. An example of a many-to-many relationship is the link between constituents and appeals. A single constituent can have multiple appeals and a single appeal can be assigned to multiple constituents. Another example is the relationship between constituent records and addresses. A constituent can have multiple addresses and an address can be linked to multiple constituents.



## Tabs of a Constituent Record

The tabs of a constituent record are broken down into two main groups. One group consists of tabs whose data can be added only through a constituent record. These tabs are the Bio 1, Bio 2, Org 1, Org 2, Addresses, Addressees/Salutations, Relationships, s, Attributes, Appeals, and Media tabs. The second group's tabs contain data that can be entered through a constituent record as well as through their corresponding record types. These tabs are Gifts, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events.



The first group of tabs whose data can be added only through a constituent record can also be broken down into several categories. One category consists of tabs that contain biographical information for individuals and organizations. These tabs are the Bio 1, Bio 2, Org 1, and Org 2. This information is discussed in “Biographical Information” on page 21. Another category’s tabs contain data that pertain to mailings. This information is found on the Addresses and Addressees/Salutations tabs. Information entered here is used later in *Mail* to generate letters, labels, and cards for your constituents. This information is discussed in “Constituent Mailing Information” on page 85. A third category consists of relationship information. All relationship data is stored on the Relationships tab. This information includes relationships with individuals, businesses, educational establishments, financial institutions, and funds. It is discussed in “Relationships” on page 113. The last category consists of tabs which contain a variety of information. These tabs are the Attributes, s, Appeals, and Media tabs. On these tabs, you store miscellaneous information to help you identify the qualities, personal characteristics, and preferences of your constituents. All this information is discussed in “Attributes, Notes, Media, and Appeals” on page 175.

The second group’s tabs, containing data that can be entered through a constituent record as well as through their corresponding record types (Gifts, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events), are all discussed in detail in other user guides, except for Actions. The Actions tab is discussed in “Actions” on page 229. We also discuss “Solicitors” on page 291.

The following list gives you a description of each tab and where you can go to learn more about the tab.

**Note:** If you have Security rights to *Administration*, you can view System Statistics. From the Administration page, click **System Statistics**. Up-to-date totals of all records in your database appear. This information is for viewing purposes only.

**Bio 1 tab.** The heart of the individual constituent record is the Bio 1 tab. The Bio 1 tab stores general biographical information, such as name, address, telephone numbers, constituent ID, birth date, and marital status. For more information, see “Individual Records” on page 22.

Bio 1

**Org 1 tab.** The heart of the organization constituent record is the Org 1 tab. The Org 1 tab stores general company information, such as business name, address, telephone numbers, and matching gift data. For more information, see “Organization Records” on page 59.

Org 1

**Bio 2 tab.** The Bio 2 tab stores additional biographical information for the individual constituent. This miscellaneous biographical information includes constituent codes, income level, ethnicity, birthplace, and credit card data. For more information, see “Individual Records” on page 22.

Bio 2

**Org 2 tab.** The Org 2 tab holds additional biographical information about the organization. This miscellaneous biographical information includes constituent codes, industry, number of employees, number of subsidiary companies, and parent corporation. For more information, see “Organization Records” on page 59.

Org 2

**Addresses tab.** The Addresses tab displays all stored addresses for a constituent and the constituent’s spouse or domestic partner. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete addresses from this tab. For more information, see “Addresses” on page 86.

Addresses

**Addressees/Salutations tab.** The Addressees/Salutations tab is available only for individual constituent records because this tab tracks how you display a person's name in mailings and reports. The primary addressee and salutation indicate how the constituent's name appears the majority of the time. The addressee is used for envelopes, labels, and reports. The salutation is primarily used as a greeting in letters. For more information, see "Addressees/Salutations" on page 105.

Addressees/Salutations

**Relationships tab.** The Relationships tab lists a constituent's relationships and affiliations. In day-to-day life, a constituent establishes connections with individuals, organizations, banks, financial institutions, and educational institutions. A constituent may even have a special affiliation with a fund. By tracking these relationships, you can compile a network of people and companies in a constituent's life. Tracking these connections enhances your database of prospective donors. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete relationships from this tab. For more information about relationship records, see "Managing Relationships" on page 114.

Relationships

**Appeals tab.** This tab lists gift totals for appeals to which the constituent responded. Appeals are the means you use to raise money for your organization. The Appeals tab gives you a quick snapshot of which appeal methods have been successful for the constituent. If you have security rights established from the **Security** link of *Administration*, you can view, edit, and delete appeals from this tab. For more information about the Appeals tab and appeal records, see "Appeals" on page 190 and the *Campaigns, Funds, & Appeals Data Entry Guide*.

Appeals

**Notes tab.** For each constituent, you can store multiple pads that quickly summarize important information you need to remember. The s tab stores this information in one location. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete s from this tab. For more information, see "Notes" on page 179.

Notes

**Gifts tab.** The Gifts tab lists all gifts contributed to your organization by the constituent. You can quickly see gift dates, gift types, gift amounts, and funds for which the gifts were designated. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete gifts. For more information about the Gifts tab and gift records, see the *Gift Records Guide*.

Gifts

**Attributes tab.** The Attributes tab helps you identify the qualities, characteristics, and preferences associated with a constituent. These attributes may include hobbies, interests, activities, committees, and important dates. While you set up attributes from the **Attributes** link of *Configuration*, you add attributes to a constituent record from this tab. For more information, see "Attributes" on page 176.

Attributes

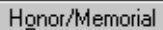
**Media tab.** The Media tab stores media objects relating to a constituent. These objects can include newspaper clippings, letters, pictures, and graphs. When you add a media object to a constituent record, you insert an electronic copy of the object. Changes to the original object do not affect the copy. However, you can make changes to the electronic copy from the Media tab. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete a media object from this tab. For more information, see "Media" on page 184.

Media

**Actions tab.** The Actions tab tracks the various communications between your organization and the constituent. These actions can include meetings, mailings, phone calls, email, and advocacy. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete actions from this tab. For more information about the Actions tab and action records, see “Actions” on page 229.

A rectangular button with a light gray background and a thin black border, containing the word "Actions" in a dark gray sans-serif font.

**Honor/Memorial tab.** The Honor/Memorial tab is available only if you use *Honor/Memorial Tracking*. This tab helps you keep track of tributes in your database. Tributes are set up to honor, celebrate, or memorialize people, organizations, or events. Constituents can contribute gifts to these tributes. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete a tribute from this tab. For more information about the Honor/Memorial tab and tribute records, see the *Tribute Data Entry Guide*.

A rectangular button with a light gray background and a thin black border, containing the text "Honor/Memorial" in a dark gray sans-serif font.

**Volunteer tab.** The Volunteer tab is available only if you use *Volunteer Management*. This tab helps you manage volunteers and their job assignments. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete volunteer information from this tab. For more information about the Volunteer tab and job records, see the *Volunteers & Jobs Data Entry Guide*.

A rectangular button with a light gray background and a thin black border, containing the word "Volunteer" in a dark gray sans-serif font.

**Prospect tab.** The Prospect tab is available only if you use *Prospect Research Management*. Prospect research is an important element of fundraising. You may use an in-house research process to learn more about your constituents, or you may work with outside research companies to gather data. Either way, the Prospect tab helps you track financial information, financial ratings, gifts to other organizations, and additional important data. With this information, you can easily target constituents who are likely to support a specific campaign or fund. For more information about the Prospect tab, see the *Prospect Data Entry Guide*.

A rectangular button with a light gray background and a thin black border, containing the word "Prospect" in a dark gray sans-serif font.

**Membership tab.** The Membership tab is available only if you use *Membership Management*. This tab lists detailed membership information for a constituent. You can view current and past memberships, as well as detailed membership data. If you have security rights established from the **Security** link of *Administration*, you can add, edit, and delete memberships from this tab. For more information about the Membership tab and membership records, see the *Membership Data Entry Guide*.

A rectangular button with a light gray background and a thin black border, containing the word "Membership" in a dark gray sans-serif font.

**Events tab.** The Events tab is available only if you use *Event Management*. This tab lists the events for which a constituent is or was registered. If you have security rights established from the **Security** link of *Administration*, after you add event records to your database, you can add the constituent as a participant (registrant, guest, or sponsor) for these events from the Events tab. You can also open a constituent's participant record here to edit or delete. For more information about the Events tab, event records, and participant records, see the *Event Management Data Entry Guide*.

A rectangular button with a light gray background and a thin black border, containing the word "Events" in a dark gray sans-serif font.

**NetCommunity tab.** The NetCommunity tab is available only if you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*. *Blackbaud NetCommunity* is a Web site management solution that enables your organization to create an interactive online network for your constituents. The integration between *The Raiser's Edge* and *Blackbaud NetCommunity* helps you track and view your online interactions with your constituents. On the NetCommunity tab, you can view the constituent's user profile information from



**Blackbaud NetCommunity** and track his or her online activity on your **Blackbaud NetCommunity** site. You can view email messages the constituent receives from **Blackbaud NetCommunity**, including newsletters to which the constituent subscribes. If you use Fundraiser part types in **Blackbaud NetCommunity**, you can also track the constituent's Team Fundraising activity and progress. For more information about the NetCommunity tab, see the *Blackbaud NetCommunity Integration Guide*.



# Biographical Information



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Constituents are the individuals and businesses who support your organization by contributing time, money, and resources. You are using *The Raiser's Edge* because your organization recognizes the importance of tracking these constituents. *The Raiser's Edge* combines easy-to-use features with an intuitive structure designed to meet the unique needs of your fundraising activities.

## Manage Biographical Information

*The Raiser's Edge* uses *Records* to help you maintain information on all aspects of fundraising, such as constituents, gifts, campaigns, funds, and appeals. Think of *Records* as a filing cabinet. A filing cabinet gives you quick and easy access to the resources you need for an assortment of tasks. Adding a new constituent record, or file, to your filing cabinet is simple. Click **New Individual** or **New Organization** on the Records page, enter the constituent name and identification number, and save the record. Once you create the record, “Individual Records” on page 22 and “Organization Records” on page 59 walk you through the process of adding additional constituent data, such as biographical, education, and relationship information.

Once you create a basic constituent record, you add specific information and store it in separate folders to compile an effective file. These folders contain biographical data, addresses, employment histories, giving histories, and relationship information. To help you use the constituent record file to its maximum potential, we take you step-by-step through a variety of scenarios and procedures to add these files. We strongly recommend you add as much information for each constituent as possible. A wide variety of data increases the effectiveness of your organization and helps you more accurately target your fundraising efforts. The more you know about your constituents, the more specific you can be with campaigns and appeals.

### Individual Records

**Tip:** To view recently accessed constituent records, select **File, Recently Accessed Constituents** from the menu bar of a constituent record.

Two types of constituent records exist in *The Raiser's Edge* — individual records that maintain information on people in your database, and organization records that track important data about the companies and businesses in your database. In this section, we focus on the individual record and detail various parts of the record. We instruct you on the correct way to add biographical data and discuss the impact that data has on other areas of your database.

One of the most important, and only required, pieces of data on an individual record is the name. Although this may seem simple and straightforward, you should pay special attention to how and where you enter this data. You should enter the name on the Bio 1 tab exactly how you want it to appear in mailings and reports. For example, if you enter the name “john brown” in all lower-case letters, that is how it appears throughout *The Raiser's Edge*.

**Note:** You can maximize and resize your constituent records.

On the Bio 1 tab, you see several fields that make up the full constituent name. The **Last name**, **First name**, and **Middle name** fields hold the three parts of an individual’s name. In the **Titles** fields, you select formal titles, such as Mr. or Dr. In the **Suffixes** fields, you select formal suffixes, such as Jr., Sr., or Ph.D. You can select up to two of each. Remember, accuracy is vital when you format a name.

The screenshot shows a 'Biographical' form with the following fields:

- Last name: Smith
- First name: John
- Middle name: Thomas
- Titles: Mr. (selected in the first dropdown)
- Suffixes: . Jr. (selected in the first dropdown)

**Note:** An individual can have multiple aliases, and you can enter them on the Aliases screen. To search your database for an individual constituent using an alias, we recommend you enter only last names on the Aliases screen.

If the name entered on the Bio 1 tab of a constituent record has an alias, click **Aliases**. The Aliases screen appears so you can enter the alternate last name for the constituent into the grid. Aliases help in record searches. For example, you create a record for John Thomas Smith. John is an actor who goes by the stage name of John Starr. In the **Alias** column, you enter “Starr”, the last name of the alias. You then enter “Stage Name” in the **Type** column. You can now use this last name during the search process to help you quickly access the record.

The screenshot shows the 'Aliases' dialog box with the following table:

Alias	Type
Starr	Stage Name

Buttons: OK, Cancel

**Note:** For more information about setting up Constituent business rules, see the *Configuration & Security Guide*.

You can use the Aliases screen to best suit your organization's needs. For example, to search for a constituent by a maiden name or known name, you can set up business rules so each of these last names defaults automatically into the grid. The maiden name defaults from the Bio 1 tab, and the known name defaults from the primary education relationship record. Or, you can manually enter all information into the grid. You may also find the Aliases screen helpful when you search for constituents who have been married several times and had different last names in the past. However you decide to use it, the Aliases screen provides a more in-depth way to search for a constituent. When you run a constituent search, on the Open screen, mark **Check aliases** to ensure aliases are used in your search.

Once the name is correctly established on the record, the focus switches to the rest of the Bio 1 tab. This tab is very important and houses a tremendous amount of data. This is where you track an individual's unique ID, Social Security Number, marital information, preferred address, phone numbers, email addresses, educational history, current business information, and banking information. This tab holds basic biographical information. Although this data is not required by *The Raiser's Edge*, it helps you know your constituents on a more personal level, which can result in donations due to more successful solicitation techniques. For example, you can track your constituents' birthdays and send them cards or use their nicknames or maiden names for more personal mailings.

**Note:** Once you add an individual constituent record to your database, you can view the properties of that constituent record by selecting **File, Properties** from the menu bar of the record. Properties tell you the system record ID, the date the record was added, who added it, the date the record was last changed, the import ID, the constituent ID, and the constituent's Social Security Number.

Another way to learn more about your constituents is to track spouse or domestic partner information. When you add a spouse or domestic partner on an individual record, you create a new individual relationship for that constituent. Relationship records are similar to constituent records. You can enter biographical, address, business, and education information for relationships, just as you can for constituents. For more information about relationships, see "Managing Relationships" on page 114.

To stay in touch with your constituents, you must maintain accurate address and telephone information. With **The Raiser’s Edge**, you can track multiple addresses for each constituent. You can indicate current and past addresses and identify what time of year a constituent resides at an address. You can designate which addresses should receive mail and which are for informational purposes only. The address found on the Bio 1 tab is always the preferred address, or the address where the constituent prefers to receive mail. If you add an address from the Bio 1 tab, the program automatically marks that address as the preferred address. For more information about how to add addresses, see “Managing Mailing Information” on page 86.

Solicit codes provide a convenient method to flag constituents as “exceptions to the rule” for your solicitors. These codes tell your solicitors that a constituent has certain rules or conditions the solicitors should follow. These rules can then be used to add or remove a constituent from a solicitation. For example, Dusty Conner may not want anyone to call him at work, so you can add a solicit code of “Do not phone at work” to his constituent record.

**Note:** For more information about *Alumni Tracking*, see the *Alumni Data Entry Guide*.

When you click the **Education** button on the Bio 1 tab, you can track an individual’s primary education relationship. The primary education relationship is often the last educational establishment attended by the constituent. When you use *Alumni Tracking*, you can mark a constituent education record as primary. When you mark an education record as primary, you designate the record as the main or most recent education record for the constituent. This is valuable when you work with constituents or their friends and relatives who have numerous education records. The record marked primary also appears when you run queries and reports. A variety of education/alumni reports are available to help you view and evaluate the educational status of your alumni. The **Education** button stores the school name, school type, dates attended, degrees, education attributes, and related information. You can track additional education relationship records on the Relationships tab.

From the Bio 1 tab, you can track an individual’s primary business relationship. The primary business relationship is usually the constituent’s current employer. Employment information helps you solicit matching gifts or corporate contributions from the employer. The **Business** button stores the organization name, industry, profession, job title, income, and related information. You can track additional business and organization relationships on the Relationships tab.

**Organization Relationship for John T. Smith**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

Org name:  Aliases

Country:  More... Industry:

Address lines:  Position:   Print?

City:  Profession:

State:  Kentucky Income:

ZIP:  DPC:  Relationship:

Reciprocal:

Print organization name with address Date from:  to

Phones/Email/Links			
DNC	Type	Number/Email Ad...	Shared?
	Business	502-555-3606	Not Shared

For this organization, this individual is a(n):

Employee  Primary business information

Contact  Do not mail to this contact

Contact type:

From the Bio 1 tab, you can track an individual’s primary bank or financial institution relationship through the **Bank** button. The primary bank relationship is usually the financial account from which a constituent contributes gifts to your organization. For example, if John Smith makes recurring gift payments by direct debit, you can list the bank that maintains his account as his primary bank. When you use *Electronic Funds Transfer*, the **Bank** button also stores important electronic funds transfer information. You can track additional bank or financial institution relationships on the Relationships tab. For more information about electronic funds transfer, see the *Electronic Funds Transfer (EFT) Guide*.

On the Bio 1 tab, you can also indicate whether individuals are inactive, are solicitors, have no valid addresses, usually contribute gifts anonymously, or request to receive no email. These checkboxes are very simple to use but have very powerful results. The checkboxes default to unmarked when a new record is created.

When you mark **This constituent - Is inactive**, the constituent record becomes inactive throughout the entire program. This means you can manually search for and access the record from *Records*, but it is excluded from any automatic program searches like *Query*, *Mail*, or *Reports*. For historic purposes, we recommend you mark this checkbox and not permanently delete a constituent from your database.



When you mark **This constituent - Is a solicitor**, the **Details** button is enabled. When you mark this checkbox, you tell *The Raiser's Edge* that this constituent is a solicitor. You can now associate the record with other constituents' gifts, pull the record into solicitor reports, and consider the record for queries that contain solicitor filters. For more information about solicitors, see "Solicitors" on page 291.

The screenshot shows the constituent record for John T. Smith. The record is displayed in a window titled "John T. Smith" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. The record is organized into tabs: Attributes, Media, Actions, Hgnor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The Bio 1 tab is active, showing biographical and address information.

**Biographical Information:**

- Last name: Smith
- First name: John
- Middle name: Thomas
- Titles: Mr.
- Suffixes: , Jr.
- Nickname: Johnny
- Maiden name:
- ID: 71
- Gender: Male
- SSN: 255-55-6609
- Birth date: 02/06/1953
- Age: 52
- Deceased?:
- Marital status: Single
- Spouse:
- Solicit code: End of year mailing only

**Preferred Address - Home:**

- Country: United States
- Address lines: 621 Winder Road
- City: Louisville
- State: KY (Kentucky)
- ZIP: 40213
- DPC:

**Phones/Email/Links:**

DNC	Type	Number/Email Address	Shared?
	Home	502-555-8236	Not Shared

**This constituent:**

- Is inactive
- Gives anonymously
- Requests no email
- Is a solicitor
- Has no valid addresses

**Buttons:** Details, Education, Business, Bank

**Volunteer (01/01/2002 - )**

When you mark **This constituent - Has no valid addresses**, you indicate that even though addresses may be present on the record, none are valid. When you mark this checkbox, you eliminate these records from mailings and reports. However, you can select to include them based on this checkbox. Most reports and mail functions have a checkbox to include **Constituents with no valid addresses**. When you mark this checkbox, you include them for only the current report or mailing.

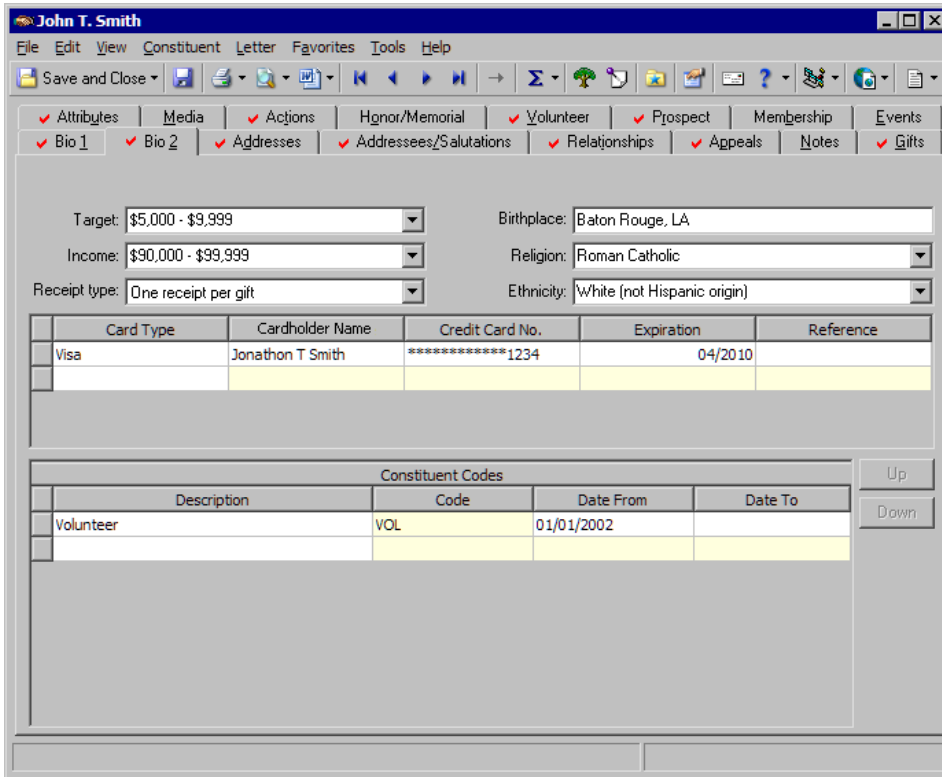
When you mark **This constituent - Gives anonymously**, the program automatically marks the **Gift is anonymous** checkbox on the Miscellaneous tab of a gift record when you add a new gift for this constituent. This saves time with data entry and helps eliminate errors with gift records. For more information about adding gifts, see the *Gift Records Guide*.

When you mark **This constituent - Requests no email**, you indicate that the constituent does not want to be contacted by email. When you mark this checkbox, the constituent receives no email through the **Global Add Records** email function or through **RE:NetMail** in *NetSolutions*. For more information about Global Add, see the Global Add chapter of the *Global Add, Delete, & Change Guide*. For more information about *NetSolutions*, see the *NetSolutions Guide*.

The Bio 2 tab tracks additional miscellaneous constituent data. This extra information helps you further build working files on your individuals. This diverse information includes target level, income level, birthplace, religion, and ethnicity. You can query on all this data for grouping purposes, or you can use it in analytical reports to give you visual statistics about the breakdown of your database.

You can also track the type of receipt the individual wants to receive. Maybe the constituent requests one receipt per gift or decides to receive consolidated receipts. Your selection on the Bio 2 tab determines the type of receipts the constituent receives when you run the Receipts mail task from *Mail*. For more information about receipting in *Mail*, see the *Mail Guide*.

On the Bio 2 tab, one very useful area in particular is the credit card grid. For example, if John Smith regularly contributes to your organization by credit card, you can use this to track his credit card information. When you add a new gift record for John, when you select a pay method of Credit Card, you can click in the **Card type** field on the gift record and press **F7** on your keyboard to access the Credit Card screen. On this screen, all credit cards entered on the Bio 2 tab appear. You can quickly and easily select the appropriate card. When you maintain current credit card data, you save time and eliminate possible data entry errors each time the constituent donates.



The bottom half of the Bio 2 tab contains the **Constituent Codes** grid. Constituent codes define the relationship a constituent has with your organization, such as Board Member, Alumnus, Trustee, and Friend. In other words, a constituent code tells you why the individual is in your database. Each constituent record in your database should have at least one constituent code. In addition to defining the relationship a constituent has with your organization, you can use constituent codes in queries, reports, mail tasks, and security. For example, you want to send a letter to all your board members to announce a change in the meeting schedule. You first create a query of all records with a constituent code of Board Member, and then use *Mail* to generate a letter. Or, you can go directly to *Mail* and specify in your parameters to consider only records with a constituent code of Board Member for the mailing. You can also generate reports broken down by constituent code to which group — Trustee, Alumnus, or Volunteer — contributes the most money. You can add more than one constituent code for each constituent, but the top constituent code takes precedence.

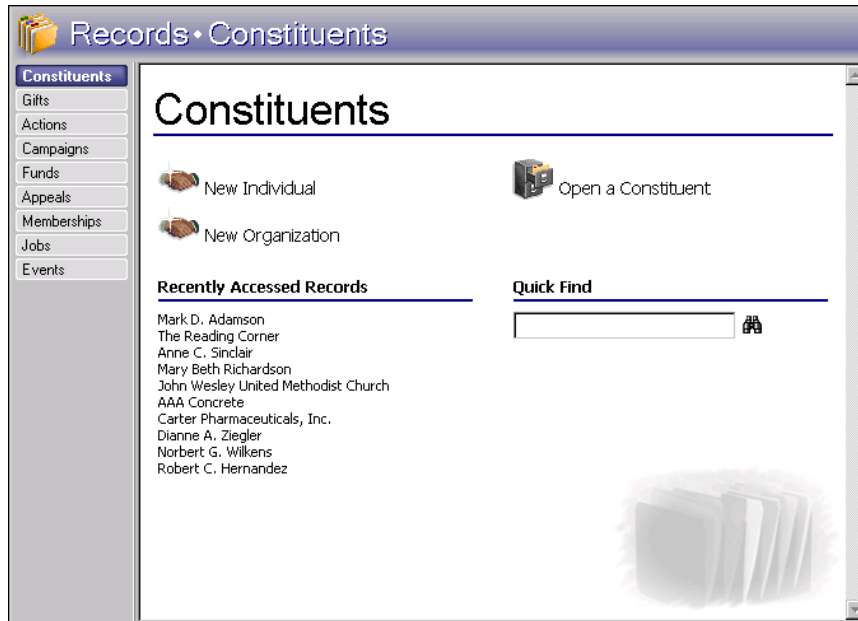
The Bio 1 and Bio 2 tabs of an individual record hold a tremendous amount of information. Accurate data entry and a clear understanding of each field is vital to building and maintaining a clean, consistent database. We recommend you take some time and go through the scenarios and procedures on the following pages to ensure a solid understanding.

► **Add an individual constituent record**

**Note:** If you change a record and notice your changes do not update automatically, click **Save** on the toolbar before you add additional information.

You can add a new individual constituent record from the shell **File** menu, from the **File** menu of an existing individual constituent record, and from *Records*. For the easiest and most complete access to all record types, we recommend you add and open records from *Records*.

1. On the Raiser's Edge bar, click **Records**.
2. Click **Constituents**. The Constituents page appears.



**Tip:** You can quickly enter multiple constituent records in a batch. For more information about the batch entry of constituent records, see the Constituent Batch chapter of the *Batch Guide*.

3. Click **Open a Constituent**. The Open screen for constituents appears. To avoid duplicate records, you should first search your database for the constituent before you add a new record to your database.

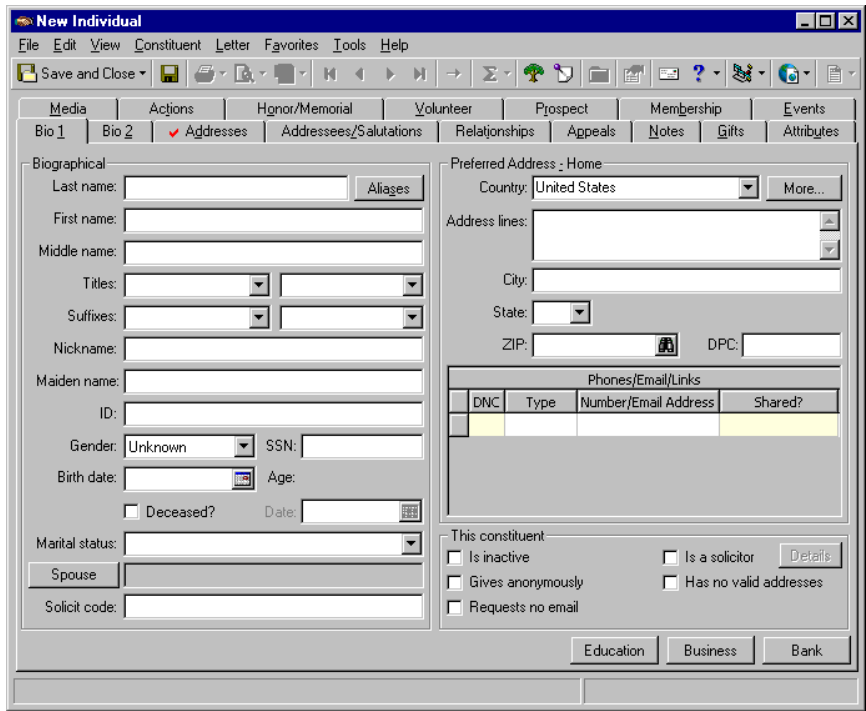
4. Under **Find Constituents that meet these criteria**, enter the constituent name in the **Last/Org name** field.
5. Click **Find Now**. If the program does not find a match, you can enter a new individual without creating a duplicate record.

**Tip:** On the Open screen, you can click **Add New** to add a new individual constituent record.

6. To return to the Constituents page, click **Cancel**.

In *The Raiser's Edge*, required fields appear in aqua by default. You can change the default color on the Color tab of User Options. For more information about setting this and other preferences in User Options, see the *Program Basics Guide*.

7. Click **New Individual**. A blank constituent record appears.



**Note:** After you enter data in the name fields, *The Raiser's Edge* checks the database for duplicates based on the options set in *Configuration*. Enter data in as many name fields as possible. The more information you enter, the more combinations you have when you choose addressees or salutations.

8. In the **Last name**, **First name**, and **Middle name** fields, enter the name of the new constituent.
9. In the **Titles** and **Suffixes** fields, select any titles, such as Mr. or Mrs., and suffixes, such as M.D. or Ph.D.
10. If the constituent has an alias or alternate last name, add it to the record. Aliases and alternate last names help in record searches but are not required.

- a. Click **Aliases**. The Aliases screen appears.

Alias	Type
Johns	Stage Name

- b. In the **Alias** column, enter the alternate last name or alias.  
 c. In the **Type** column, select the type of alias, such as “Stage Name” or “Maiden Name”.  
 d. Click **OK**. You return to the Bio 1 tab. When you run a constituent search, you can now search for the constituent by the alias when you mark **Check aliases** on the Open screen that appears.

**Note:** The ID is unique to the constituent. You can use the ID to both identify the constituent and locate the record. We recommend all records in your database have an ID number.

11. In the **ID** field, enter a constituent identification number. If you set the business rule in *Configuration*, the program automatically generates a unique ID. We recommend you set this rule to eliminate errors and duplicate IDs. For more information about how to set business rules, see the *Configuration & Security Guide*.

**Biographical:**  
 Last name: Johnson  Aliases  
 First name: Joan  
 Middle name: Marie  
 Titles: Mrs.  
 Suffixes: . Ph.D.  
 Nickname:  
 Maiden name:  
 ID: 8829  
 Gender: Unknown SSN:  
 Birth date: Age:  
 Deceased? Date:  
 Marital status:  
 Spouse:  
 Solicit code:

**Preferred Address : Home**  
 Country: United States  
 Address lines:  
 City:  
 State:  
 ZIP: DPC:

DNC	Type	Number/Email Address	Shared?

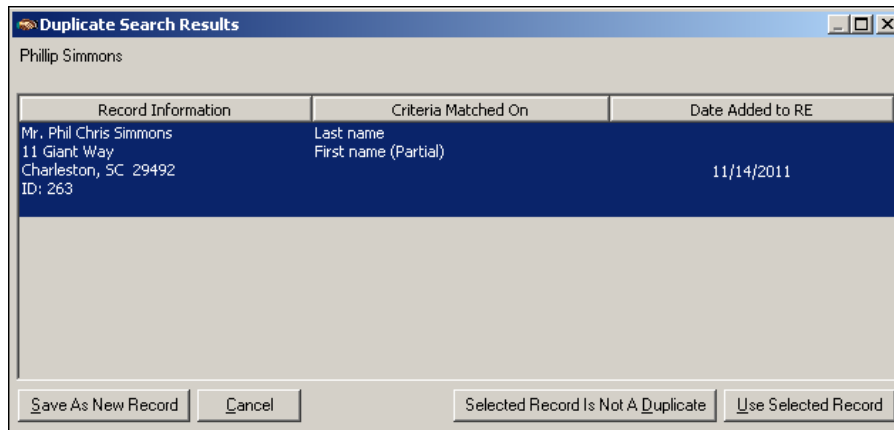
**This constituent**  
 Is inactive  
 Gives anonymously  
 Requests no email  
 Is a solicitor  
 Has no valid addresses

Education Business Bank

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

12. On the toolbar, click **Save and Close**.

If the constituent you entered is a potential duplicate in your system, the Duplicate Search Results screen appears.



All possible duplicates appear in the grid. Click **Save As New Record** if the constituent is not a duplicate and you would like to create a new constituent record.

Click **Use Selected Record** if the constituent you would like to add is actually a duplicate record. This option will not create a second record, and will maintain the information on the existing constituent record.

Click **Selected Record Is Not A Duplicate** to allow the system to never match the constituent you would like to add with the selected record on the Duplicate Search Results screen. When you select this option, these two records will never again be considered as potential duplicates in your system.

► **Add basic biographical information on the Bio 1 tab**

When we talk about basic biographical information, we mean the personal details that are not absolutely necessary but help you learn more about your constituents. In *The Raiser's Edge*, this biographical information includes nicknames, maiden names, gender, Social Security Numbers, and birth dates.

**Scenario:** Last month, you heard from one of your board members that Alexander Hamilton was interested in your organization's activities. You created a record for him with name and address, but you have not been able to gather any additional data. Today, Alexander attends your organization's Open House and fills out a prospective donor card. He fills in his nickname, gender, Social Security Number, and birth date. Enter this information on the Bio 1 tab of Alexander's constituent record.

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without your mouse. For example, press **ALT + 1** on your keyboard to select the Bio 1 tab.

1. From Alexander Hamilton's constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

**Alexander D. Hamilton**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical**

Last name: Hamilton Aliases

First name: Alexander

Middle name: Duke

Titles: Mr.

Suffixes:

Nickname:

Maiden name:

ID: 2240

Gender: Unknown SSN:

Birth date: Age:

Deceased? Date:

Marital status:

Spouse

Solicit code:

**Preferred Address : Home**

Country: United States More...

Address lines: 440-A Rivers Avenue

City: Eugene

State: OR Oregon

ZIP: 97504 DPC:

**Phones/Email/Links**

DNC	Type	Number/Email Address	Shared?
	Home	541-555-7564	Not Shared

**This constituent**

Is inactive  Is a solicitor Details

Gives anonymously  Has no valid addresses

Requests no email

Supporter (11/13/2003 -)

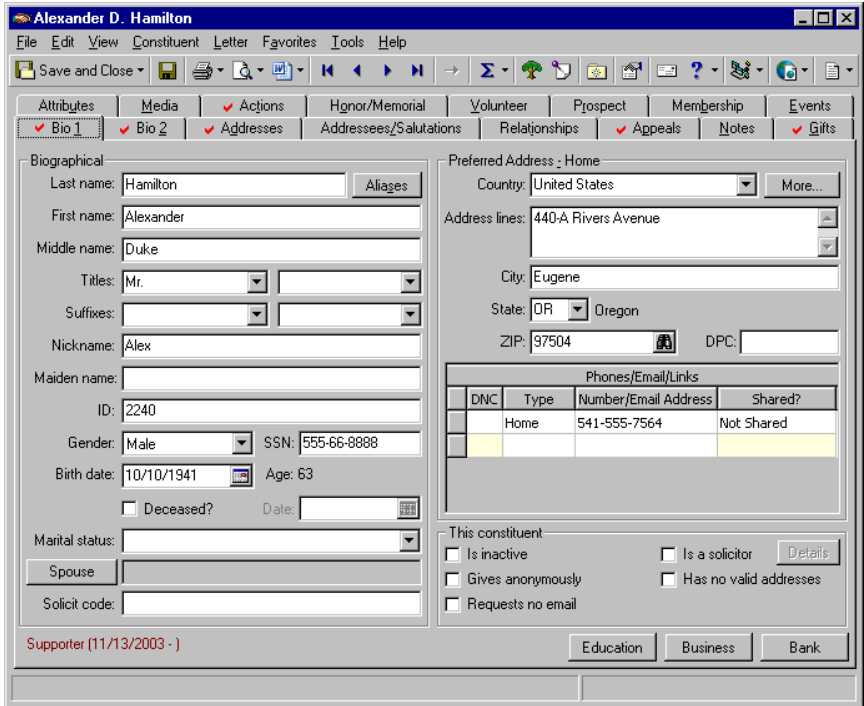
Education Business Bank

**Note:** If you enter data in the **Nickname** or **Maiden name** field, it generates into a choice available for Addressee/Salutations.

2. In the **Nickname** field, enter "Alex".
3. In the **Gender** field, select "Male".
4. In the **SSN** (Social Security Number) field, enter "555-66-8888".

**Tip:** To print a constituent or individual profile right from a constituent record, select **File, Print, Constituent Profile** or **Individual Profile** on the menu bar. The Select a Parameter file screen appears. Select a parameter file and click **Select**. If a parameter file does not exist, click **Add New** to add one. You can also add parameter files from **Profiles, Lists, and Directories** on the Reports page. All parameter files added appear on the Select a Parameter file screen. You can also export, preview, and send a profile as email from the **File** menu. For information about profiles and how to add parameter files, see the *Reports Guide*.

- In the **Birth date** field, enter the date 10/10/1941. If you do not know the entire date, enter a fuzzy date, such as 10/1941. When you tab out of the field, Alexander’s age automatically calculates and appears in the **Age** field.



- On the toolbar, click **Save and Close**.

► **Add a constituent address from the Bio 1 tab**

To stay in touch with your constituents, you must maintain accurate address, telephone, and email information. The address found on the Bio 1 tab is always the preferred address, or the address where the constituent prefers to receive mail. When you add an address from the Bio 1 tab, the program automatically marks the address as the preferred address. An individual constituent record can have only one preferred address. For more information about how to add alternate addresses, see “Managing Mailing Information” on page 86.

**Scenario:** Earl Hunter has been a constituent in your database for weeks, but you have never had a valid address for him. Today, Earl fills out a prospective donor card with his address information and phone numbers. From the Bio 1 tab, enter Earl’s address, city, state, ZIP, and valid phone numbers.

**Note:** When the address is linked to another constituent record, a link icon appears on the **More** button.



1. From Earl Hunter's constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

**Earl N. Hunter**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

Biographical:  
 Last name: Hunter Aliases  
 First name: Earl  
 Middle name: Nathan  
 Titles: Mr.  
 Suffixes:  
 Nickname:  
 Maiden name:  
 ID: 8824  
 Gender: Male SSN:  
 Birth date: 08/22/1971 Age: 33  
 Deceased? Date:  
 Marital status: Single  
 Spouse:  
 Solicit code: Do not phone

Preferred Address - Home  
 Country: More...  
 Address lines:  
 City:  
 State:  
 ZIP: DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	360-555-1268	Not Shared
	Email	earl.hunter@ix.alc...	Cannot be ...

This constituent  
 Is inactive  Is a solicitor Details  
 Gives anonymously  Has no valid addresses  
 Requests no email

Member Education Business Bank

**Warning:** For data entry consistency, we recommend you click **More** and add your address information in the appropriate fields on the Address screen.

2. Click **More**. The Address screen appears.

**Address for Earl N. Hunter**

File Edit View Address Help

Save and Close

Address Attributes

Country: United States  
 Address lines: 1991 Suquamish Lane  
 City: Silverdale  
 State: WA Washington  
 ZIP: 98383 DPC: 57

Address Information  
 Address type: Home  
 Info source: Prospective Donor Card  
 County: Kitsap  
 Region: Pacific  
 CART: C013 LOT: D0000  
 Send mail to this address

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	360-555-1268	Not Shared
	Email	earl.hunter@ix.alc...	Cannot be ...

Valid Dates  
 Seasonal Address  
 Date from: Seasonal from: 01/01  
 Date to: Seasonal to: 12/31

Address block: 1991 Suquamish Lane  
 Silverdale, WA 98383

**Tip:** You can use **Globally Add Records** to send an email message to selected or all constituent records in your database. The program uses the email address you add for the constituent's preferred address. For more information, see the *Global Add, Delete, & Change Guide*.

3. In the **Country** field, select "United States". The country you select determines the fields that appear on the Address screen. For example, if you select "Canada" instead of "United States", the **State** and **ZIP** fields change to **Province** and **Postal Code**.
4. In the **Address lines** box, enter "1991 Suquamish Lane".
5. In the **City** field, enter "Silverdale"; in the **State** field, select "WA"; and in the **ZIP** field, enter "98383".
6. In the **DPC** field, enter "57". DPC is the Delivery Point Code. It is used as part of the address barcode.
7. In the first row of the **Phones/Email/Links** grid, select "Home" in the **Type** column, and enter the phone number 360-555-1268 in the **Number/Email Address** column.
8. In the **Shared** column, "Not Shared" appears by default beside this new phone number. This means that in *Configuration Tables*, in Phone Types, on the Edit Phone Types screen for Home phone numbers, you left **Do not share phones of this type** unmarked. This selection enables the phone type to be shared if you later copy and link the address with another constituent or relationship record. To not share this Home phone number, select "Do Not Share" in this column. In *Configuration Tables*, if you marked **Do not share phones of this type** for this phone type, "Cannot be Shared" appears in the **Shared** column beside the phone number and the field would be locked. For more information about copying and sharing addresses and phone sharing, see "Copying and linking an address from one constituent record to another" on page 95, "Copying and Linking Relationship Addresses" on page 146, and "Phone Sharing" on page 157.
9. In the first row beside this Home phone number, leave the checkbox in the **DNC** column unmarked. This is Earl's preferred phone number and he asks to be contacted at this number. DNC stands for "Do Not Contact." When you mark this column beside a phone number or email address, a visual warning appears in the column. This warning tells you the constituent does not want to receive phone calls at the number or messages at the email address.

**Tip:** Once you enter an email address in the **Phones/Email/Links** grid, you can click the email address to send an email message directly from the grid. The Email screen appears, so you can compose and send your message. Once you send the email, the program records an action on the Actions tab of the constituent record.

10. In the second row of the **Phones/Email/Links** grid, select "Email" in the **Type** column, and enter "earl.hunter@ix.alc.com" in the **Number/Email Address** column. By default, "Cannot be Shared" appears in the **Shared** column. In *Configuration Tables*, you marked the **Do not share phones of this type** checkbox for this phone type.

Leave the **DNC** column beside this number unmarked here, too.

11. In the **Address type** field, select "Home". Earl's primary address is his home address.
12. In the **Info source** field, select "Prospective Donor Card".
13. In the **County** field, enter "Kitsap".

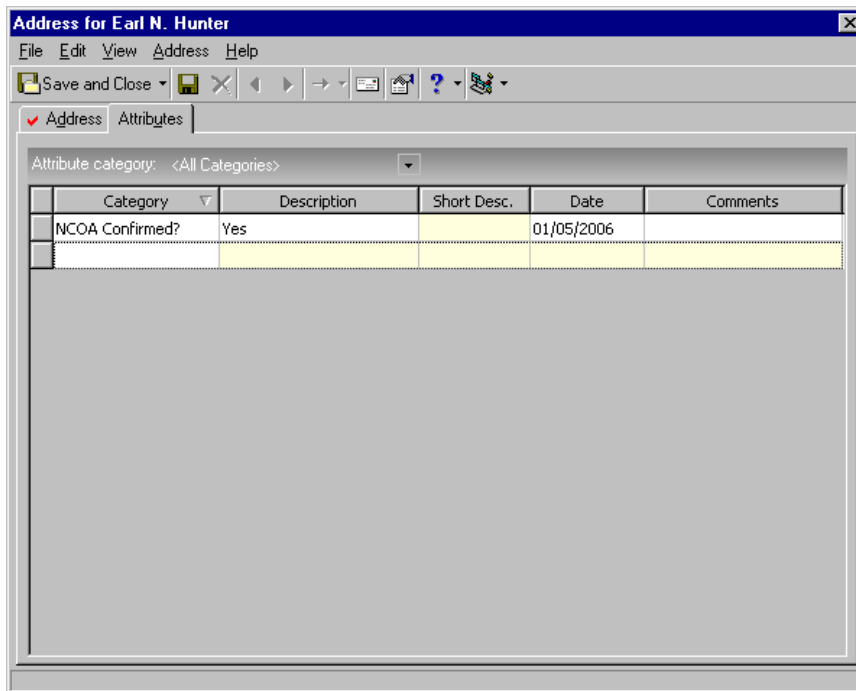
Because you did not add Kitsap to the Counties table when you originally set up your tables in *Configuration*, when you tab out of the field, a message appears to ask whether to add it to the table. Click **Yes**.

**Note:** If an entry does not exist in a drop-down list in a field where you must make a selection, you can type your entry directly into the field if you have security rights established. A message appears to ask whether to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish table entries from the **Tables** link of **Configuration**. For information about how to set up tables, see the *Configuration & Security Guide*.

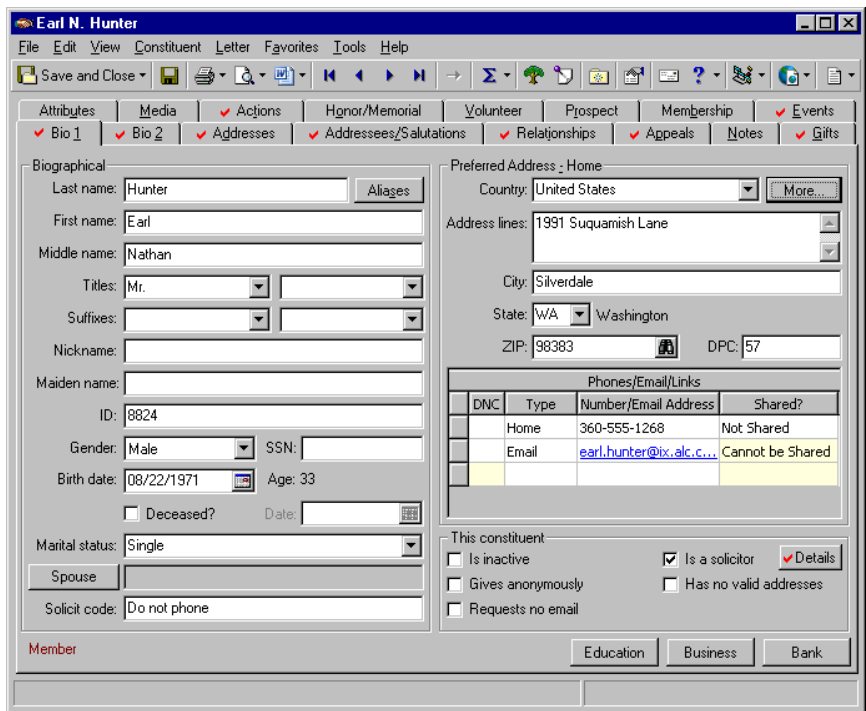
14. In the **Region** field, select “Pacific”. Silverdale, Washington is in the Pacific region of the United States.
15. In the **CART** field, enter “CO13”. CART is the carrier route. It is used as the endorsement line to sort mailings for further discounts.
16. In the **LOT** field, enter “D000”. LOT stands for “line of travel” and is used with the CART in the endorsement line.
17. Make sure **Send mail to this address** is marked. This tells the program the Silverdale address is valid.
18. If this address is valid only for a specific period of time, under **Valid Dates**, enter dates in the **Date from** and a **Date to** fields. If the address is current, leave the **Date to** field blank.
19. If an address is seasonal, mark **Seasonal Address** and enter dates in the **Seasonal from** and **Seasonal to** fields. To notate that the address is good all year, mark **Seasonal Address** and enter “01/01” in the **Seasonal from** field and “12/31” in the **Seasonal to** field.

**Note:** *Mail* uses this information to include and exclude constituents from mailings, so accurate data entry is vital to a successful mailing.

20. Select the Attributes tab. Enter any attributes concerning this address. For more information about how to add attributes, see “Attributes” on page 176. Once you learn to track attributes in one part of *The Raiser’s Edge*, you can easily apply those principles elsewhere in the program.



21. Click **Save and Close**. You return to the Bio 1 tab of Earl’s constituent record. The address and phone numbers appear on the tab.



**Note:** When you change an address and save your changes, if the address is linked to other records, a message appears to inform you that the address is shared. You can select to change the address on all records that share the address or on only this record or click **Cancel**. To help determine whether to change the address, you can click **Show Shared Addresses** to view a list of records that share the address.

22. On the toolbar, click **Save and Close**.

► **Add marital and spouse relationship information from the Bio 1 tab**

One way to learn more about your constituents is to track spouse and domestic partner information. When you add a spouse or domestic partner for a constituent, you create a new individual relationship record for that constituent. The new individual spouse relationship record can exist solely as a nonconstituent relationship on the primary constituent’s record or have its own constituent record in your database. On the spouse individual relationship record, you can enter biographical, address, business, and education information, just as you can on a constituent record. For more information, see “Individual Relationships” on page 116.

It is important to note how the program handles addresses for a spouse relationship record. If the spouse is not a constituent and does not have a constituent record in your database, the constituent address from the primary constituent record (to whom you add the spouse) defaults onto the newly created spouse relationship record. These two addresses are automatically linked. If you do not want the address to be shared, you must manually break the link. If the spouse is already a constituent in your database and has a separate constituent record with its own address, when you add the constituent as a spouse individual

relationship, the spouse's address from the spouse's constituent record defaults onto the relationship record. The primary constituent's address and the spouse's address are not automatically linked. To have the primary constituent and spouse share the same address, you must manually link a common address. For more information about how to link and break relationship addresses and phone sharing, see "Copying and Linking Relationship Addresses" on page 146.

**Scenario:** Alexander Hamilton's wife, Jane, is currently not a constituent in your database. From the **Spouse** button, add Jane and her biographical information to Alexander's constituent record as an individual constituent (spouse) relationship.

1. From Alexander Hamilton's constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

The screenshot shows a software window titled "Alexander D. Hamilton" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The "Bio 1" tab is active, displaying the following information:

**Biographical:**  
 Last name: Hamilton (with Aliases button)  
 First name: Alexander  
 Middle name: Duke  
 Titles: Mr. (dropdown)  
 Suffixes: (dropdowns)  
 Nickname: Alex  
 Maiden name: (empty)  
 ID: 2240  
 Gender: Male (dropdown) SSN: 555-66-8888  
 Birth date: 10/10/1941 (calendar icon) Age: 63  
 Deceased? Date: (calendar icon)  
 Marital status: (dropdown)  
 Spouse: (button)  
 Solicit code: (text field)

**Preferred Address - Home:**  
 Country: United States (dropdown) (More... button)  
 Address lines: 440-A Rivers Avenue (text field)  
 City: Eugene (text field)  
 State: OR (dropdown) Oregon  
 ZIP: 97504 (text field) DPC: (text field)

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	541-555-7564	Not Shared

**This constituent:**  
 Is inactive  
 Gives anonymously  
 Requests no email  
 Is a solicitor (Details button)  
 Has no valid addresses

Supporter (11/13/2003 - )  
 Education Business Bank

**Note:** When you make a spouse a constituent in your database, or if the spouse is already a constituent in your database, a checkbox appears on the General 1 tab of the individual relationship record (under the **Spouse** checkbox), so you can determine who to designate as head of household. In *Mail* processing, the **Head of Household** checkbox can determine who should receive a particular mailing. For information about how this checkbox can affect your mailings, see the *Mail Guide*.

2. In the **Marital status** field, select "Married". You want to designate that Alexander and Jane are a married couple.

3. Click **Spouse**. Because a spouse or domestic partner is an individual relationship, the New Individual Relationship screen appears.

**New Individual Relationship for Alexander D. Hamilton**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

**Biographical**

Last name: Hamilton Aliases

First name: Jane

Middle name: Ellen

Titles: Mrs.

Suffixes:

Nickname:

Maiden name:

ID:

Business Education

This individual is the:

Spouse

**Address - Home**

Country: United States More...

Address lines: 440-A Rivers Avenue

City: Eugene

State: OR Oregon

ZIP: 97504 DPC:

**Phones/Email/Links**

D...	Type	Number/Email A...	Shared?
	Home	541-555-7564	Shared

Relationship: Wife

Reciprocal: Husband

Date from: to

**Tip:** When your cursor is in the **Last name** field for the spouse on the Relationship record, if you press **F3** on your keyboard, the constituent last name defaults into the **Last name** field.

4. Select the General 1 tab.
5. In the **Last name** field, enter "Hamilton"; in the **First name** field, enter "Jane"; and in the **Middle name** field, enter "Ellen".
6. In the first **Titles** field, select "Mrs."

**Warning:** For data entry consistency, we recommend you click **More** and add additional address information in the appropriate fields on the Address screen. When the address is linked, a check mark appears on the **More** button.

7. Click **More**. The Address for Relationship screen appears.

**Note:** You can select the Attributes tab and add any address attributes for the spouse.

8. Select the Address tab. Because Jane is Alexander’s spouse and they share the same address, Alexander’s preferred address and phone numbers default onto the individual spouse relationship record and onto the Address tab.

The two addresses are linked, meaning if you change information on one address, it changes the other. If you do not want to accept Alexander’s address that automatically defaults in for Jane, change this information. Once you make the changes and click **Save and Close** on the toolbar of the Address screen, a message appears to inform you that the address is shared. On the message, you can select **Change this address on all records that share the address** (meaning in this case, both records) or **Change the address on this record only**. Select **Change the address on this record only** and click **OK**. You return to the Address screen. The link is broken and you can now alter addresses on either record without affecting the other. To link the addresses again, click **More** and select **Relationship, Copy/Share Address from Constituent** from the menu bar of the Address screen. The Open screen appears, so you can search for Alexander’s address to share once again. For more information about how to link addresses, see “Copying and linking an address from one constituent record to another” on page 95 and “Copying and Linking Relationship Addresses” on page 146.

For this scenario, you want Alexander and Jane to share the same address, so leave Alexander’s default address on the Address screen.

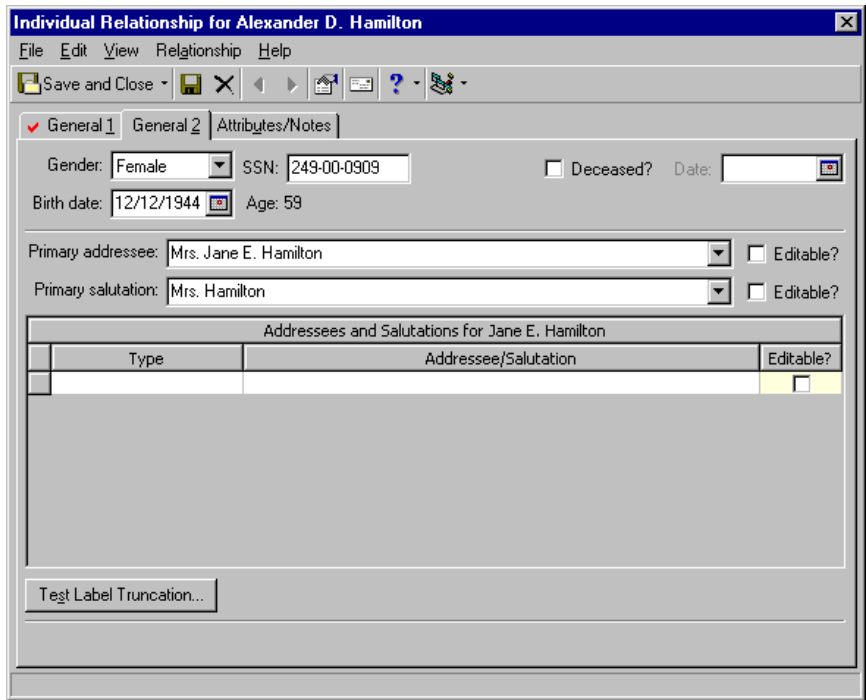
**Note:** When you change an address and save your changes, if the address is linked to other records, a message appears to inform you that the address is shared. You can select to change the address on all records that share the address or on only this record, or click **Cancel**. To help determine whether to change the address, you can click **Show Shared Addresses** to view a list of records that share the address.

9. Click **Save and Close**. You return to the General 1 tab of the Relationship screen.
10. On the General 1 tab, in the **Relationship** field, select “Wife”. This is the association Jane has to Alexander. In the **Reciprocal** field, select “Husband”. This is the association Alexander has to Jane.

11. To add business information for Jane, click **Business**. The Businesses screen appears, so you can enter her business information. Click **New Business**. Once you add business information, save, and return to the Businesses screen, click **Close**. You return to the General 1 tab. For information about how to add primary business information, see “Add a primary organization (business) relationship record from the Bio 1 tab” on page 49.
12. To add education information for Jane, click **Education**. The Education Information screen appears, so you can enter her education and alumni information. Click **New Education/School**. Once you add education information, save, and return to the Education Information screen, click **Close**. You return to the General 1 tab. For information about how to add primary education information, see “Add a primary education relationship record from the Bio 1 tab” on page 47.

**Note:** If you mark **Editable**, you can manually change information in the **Addressee/Salutation** grid.

13. Select the General 2 tab and enter any additional biographical information for Jane, as shown in the following picture. You can define a **Gender**, **Birth date**, and **SSN** (Social Security Number). If a spouse relationship is deceased, mark **Deceased** and enter the date the spouse passed. If the spouse is a constituent in your database, all this information defaults from the spouse’s constituent record.



14. In the **Primary addressee** field, select “Mrs. Jane E. Hamilton”; in the **Primary salutation** field, select “Mrs. Hamilton”.

**Note:** Before you make a spouse a constituent, carefully consider whether to make the spouse a constituent. Ask yourself some basic questions. Does the spouse give gifts on her own and need to be receipted separately? Does the spouse have a special constituency, such as Trustee, Board Member, or Major Donor? We recommend you set up policies at your organization to detail how and when to make a spouse a constituent in *The Raiser’s Edge*.



- From the menu bar, select **Relationship, Add this individual as a Constituent**. You decide to create a new constituent record for Jane, separate from Alexander's constituent record. A message appears so you can assign a constituency code.

The Raiser's Edge

You have chosen to save Jane E. Hamilton as a constituent. Use these fields to assign a constituency to this constituent.

Constituency: Current Parent CP

Date from: 10/10/2006

Date to:

OK Cancel

- In the **Constituency** field, select "Current Parent". In the **Date from** field, enter today's date. You should assign each constituent in your database at least one constituent code. The constituent code defines why the constituent is in your database.

**Warning:** Once you make a spouse a constituent, the biographical fields on the spouse relationship record are disabled. To change the spouse's biographical information, you must go to the spouse's newly formed constituent record. From the menu bar, select **Relationship, Go to** and the constituent record appears. For this procedure, select **Relationship, Go to Jane E. Hamilton** from the menu bar of the Individual Relationship screen.

- Click **OK**. You return to the General 2 tab of the Individual Relationship screen.
- The **Automatically soft credit this individual for gifts** checkbox now appears on this tab. A soft credit allows multiple constituents to share credit for a single gift to avoid duplicate gift records. To soft credit Jane for gifts given to your organization, leave this checkbox marked. For more information about soft credits, see the *Gift Records Guide*.
- Select the Attributes/Notes tab and enter any attributes or relevant information to store about Jane. Perhaps, she is a professional photographer and you want to note it on this tab.

Individual Relationship for Alexander D. Hamilton

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

Attribute category: <All Categories>

Category	Description	Short Desc.	Date	Comments
Interests	Photography		10/10/2006	Professional photographer
Office Hours	8:00 AM - 12:00 PM		10/10/2006	Monday through Friday

Notes:

Jane is a professional photographer. She has agreed to help us take photographs for our monthly newsletter.

**Note:** The spouse individual relationship record not only appears when you click **Spouse**, but also appears on the Relationships tab of the primary constituent record to which you add the spouse. If the spouse is also a constituent in your database, a reciprocal individual relationship also appears on the Relationships tab of the spouse’s constituent record.

- 20. On the toolbar, click **Save and Close**. You return to the Bio 1 tab of Alexander’s constituent record.
- 21. Click **Save and Close**.

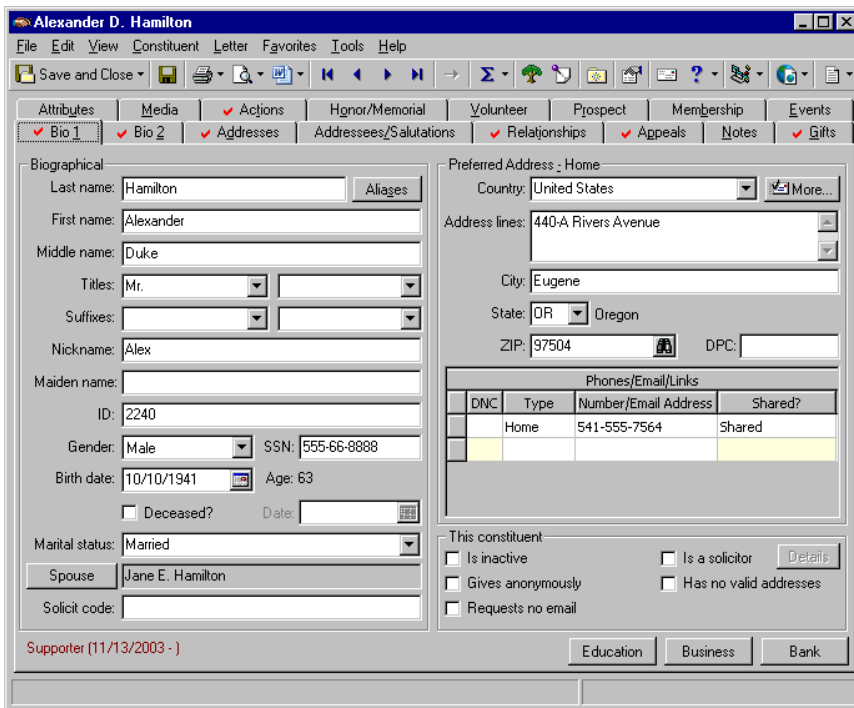
▶ **Add a solicit code on the Bio 1 tab**

With solicit codes, you can conveniently flag constituents as “exceptions to the rule” for your solicitors. These codes tell your solicitors that a constituent has certain rules or conditions to follow. These rules can be used to add or remove a constituent from a solicitation. For example, a constituent may ask not to be called at her business. You can add a solicit code of “Do not phone at work” to her constituent record.

**Scenario:** Alexander Hamilton requests to be solicited only once a year through a mailing. Add a solicit code of “End of year mailing only” to his constituent record.

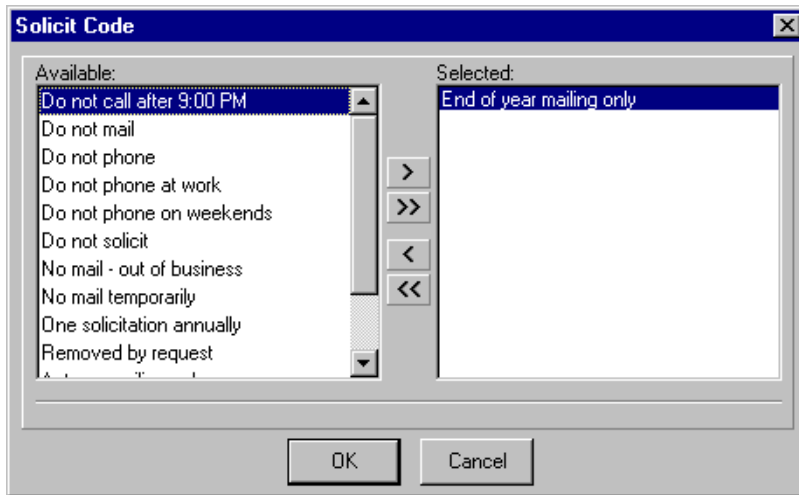
**Note:** In *Mail*, on the Filters tab of a mail task, you can use solicit codes to help limit the records included in a mailing. For example, you may decide to filter on the selected solicit code of “Removed by request” so you can quickly identify those constituents who do not want to be solicited. For more information about the Filters tab of a mail task, see the *Mail Guide*.

- 1. From Alexander Hamilton’s constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.



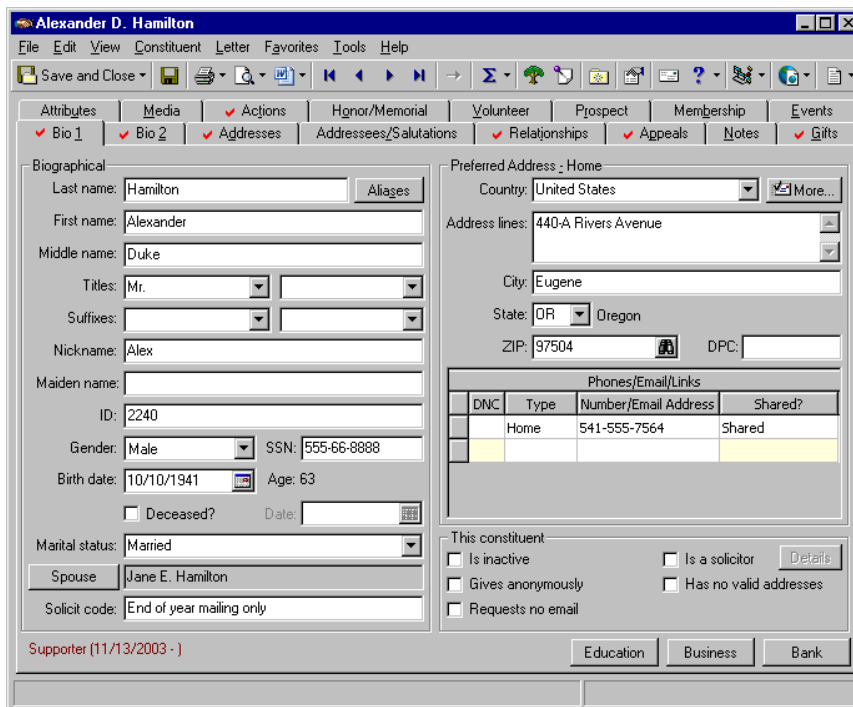
**Warning:** We recommend you use solicit codes only as “exceptions to the rule.” to help maintain the effectiveness of the solicit codes. For example, do not create a code of “OK to phone” in response to a “Do not phone” code.

- Click in the **Solicit code** field and press **F7** on your keyboard. The Solicit Code screen appears.



**Tip:** On a screen with a selection box, you can use the single right and left arrows to move one entry back and forth between the two boxes. You can use the double left or right arrows to move all entries at once.

- In the **Available** box, select “End of year mailing only” and click the single right arrow. This moves the solicit code into the **Selected** box.
- Click **OK**. You return to the Bio 1 tab of Alexander’s constituent record. “End of year mailing only” appears in the **Solicit code** field.



- On the toolbar, click **Save and Close**.

► **Add a primary education relationship record from the Bio 1 tab**

From the Bio 1 tab, you can track a constituent’s primary education relationship. The primary education relationship is usually the last school attended by the constituent. The **Education** button stores the school name, school type, dates attended, degrees, education attributes, and related information. Only one primary education relationship can exist on an individual constituent record. You can track other education relationships on the Relationships tab. For more information, see “Education/School Relationships” on page 137.

**Scenario:** One of your board members is a college friend of Alexander Hamilton’s and gives you Alexander’s educational information. Enter the name and type of school he attended, dates attended, degrees earned, and any applicable education attributes on the Bio 1 tab of Alexander’s record.

1. From Alexander Hamilton’s constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a software interface for a constituent record titled "Alexander D. Hamilton". The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a tabbed interface with tabs for Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The "Bio 1" tab is selected.

The "Biographical" section contains the following fields:

- Last name: Hamilton
- First name: Alexander
- Middle name: Duke
- Titles: Mr.
- Suffixes:
- Nickname: Alex
- Maiden name:
- ID: 2240
- Gender: Male
- SSN: 555-66-8888
- Birth date: 10/10/1941
- Age: 63
- Deceased? (checkbox)
- Marital status: Married
- Spouse: Jane E. Hamilton
- Solicit code: End of year mailing only

The "Preferred Address - Home" section contains the following fields:

- Country: United States
- Address lines: 440-A Rivers Avenue
- City: Eugene
- State: OR (Oregon)
- ZIP: 97504
- DPC:

The "Phones/Email/Links" section contains a table:

DNC	Type	Number/Email Address	Shared?
	Home	541-555-7564	Shared

The "This constituent" section contains the following checkboxes:

- Is inactive
- Gives anonymously
- Requests no email
- Is a solicitor
- Has no valid addresses

At the bottom of the form, there are buttons for "Education", "Business", and "Bank". The status "Supporter (11/13/2003 -)" is displayed at the bottom left.

2. Click **Education**. The Education/School relationship screen appears.

The screenshot shows a software window titled "New Education/School for Alexander D. Hamilton". The window has a menu bar with "File", "Edit", "View", "Education", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", a close button, and navigation arrows. The main area has two tabs: "School" (selected) and "Attributes/Notes".

Under the "School" tab, there are several input fields and a checkbox:

- School name: Northwestern University (dropdown menu)
- Type: Four Year College (dropdown menu)
- Campus: Downtown (text field)
- Known name: Hamilton (text field)
- Frat/Sorority: Sigma Nu (text field)
- Degree: BS (dropdown menu)
- GPA: 3.5 (text field)
- Class of: 1987 (text field)
- Date entered: 09/05/1983 (calendar icon)
- Date graduated: 05/17/1987 (calendar icon)
- Date left: (empty text field with calendar icon)
- Status: Graduated (dropdown menu)
- Primary alumni information:

There are two tables on the right side of the form:

Major	Comments
Chemistry	Excellent student

Minor	Comments

**Note:** To search your database for a constituent by the name entered in the **Known name** field, we recommend you enter only a last name. You can set up a business rule to automatically place the last name entered in the Aliases grid, accessed from the **Aliases** button on the Bio 1 tab of the constituent record. When you search for a constituent, you can mark **Check aliases** on the Open screen to include the **Known name** field in your search. For information about business rules, see the *Configuration & Security Guide*.

3. Select the School tab.
4. In the **School name** field, select "Northwestern University".
5. Make sure **Primary alumni information** is marked. This designates this institution as the primary school information for Alexander.
6. In the **Type** field, select "Four Year College". Northwestern is this type of college.
7. In the **Campus** field, enter "Downtown". This is the campus Alexander attended. Northwestern has a Downtown campus and a West Side campus.
8. In the **Known name** field, enter "Hamilton". This is how Alexander was addressed when he was in college.
9. In the **Frat/Sorority** field, enter "Sigma Nu".
10. In the **Degree** field, select "BS". This is the type of degree he earned.
11. In the **GPA** field, enter "3.5".
12. In the **Class of** field, enter "1987". Alexander graduated from the university in this year.
13. Alexander entered Northwestern on 09/05/1983 and graduated on 05/17/1987. Enter this information in the **Date entered** and **Date graduated** fields.

**Note:** If Alexander left college before he graduated, you would enter the date in the **Date left** field. His **Status** may have been "Incomplete".

14. In the **Status** field, select "Graduated".
15. In the Major grid, in the **Major** column, enter "Chemistry"; in the **Comments** column, enter "Excellent student". If the constituent has a minor, you can also enter this information in this grid.

16. Select the Attributes/Notes tab.

The screenshot shows a software window titled "New Education/School for Alexander D. Hamilton". The window has a menu bar with "File", "Edit", "View", "Education", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", a close button, and other navigation icons. The "Attributes/Notes" tab is selected, showing a table with the following data:

Category	Description	Short Desc.	Date	Comments
Athletics	Tennis		10/10/2006	Team captain

Below the table is a "Notes" text area containing the text: "Alexander always participates in our sporting events."

17. In the first row of the **Category** column, select "Athletics".
18. In the first row of the **Description** column, select "Tennis".
19. In the first row of the **Date** column, enter today's date, the date you enter the attribute.
20. In the first row of the **Comments** column, enter "Team captain".
21. In the **Notes** box, enter "Alexander always participates in our sporting events."
22. On the toolbar, click **Save and Close**. You return to the Bio 1 tab of Alexander Hamilton's constituent record.
23. Click **Save and Close**.

► **Add a primary organization (business) relationship record from the Bio 1 tab**

From the Bio 1 tab, you can track a constituent's primary organization (business) relationship, usually the constituent's current employer. Employment information helps you solicit matching gifts or corporate contributions from the employer. The **Business** button stores the organization name, address, industry, profession, job title, income, and related information. Only one primary organization relationship can exist on an individual constituent record. You can track other organization relationships on the Relationships tab. For more information, see "Organization Records" on page 59.

It is important to note how the program handles addresses for a primary organization (business) relationship you add for an individual constituent. If the primary organization relationship is not a constituent and does not have a constituent record in your database, you must manually enter the address on the relationship record. If the organization you add as the primary organization relationship is already a constituent in your database and has a separate constituent record with its own address, the address from that organization's constituent record defaults onto the relationship record. These two addresses are automatically linked, and each relationship record appears on the other's Relationships tab. If you do not want the address to be

shared, you must manually break the link. To change the address on the primary organization relationship record, such as to add a suite number, a warning appears when you save the record. You can select to change the address on all records that share the address or only this record. For more information about how to copy, link, and break links for relationship addresses, see “Copying and linking an address from one constituent record to another” on page 95 and “Copying and Linking Relationship Addresses” on page 146.

**Scenario:** A board member returned from a prospective donor trip and gathered biographical and business information on one of your constituents, Alexander Hamilton. Enter Alexander’s business information, including organization name, industry, profession, job title, and income on the Bio 1 tab of his constituent record.

1. From Alexander Hamilton’s constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

**Alexander D. Hamilton**

File Edit View Constituent Letter Favorites Tools Help

Save and Close Print Find

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical**

Last name: Hamilton Aliases

First name: Alexander

Middle name: Duke

Titles: Mr.

Suffixes:

Nickname: Alex

Maiden name:

ID: 2240

Gender: Male SSN: 555-66-8888

Birth date: 10/10/1941 Age: 63

Deceased? Date:

Marital status: Married

Spouse: Jane E. Hamilton

Solicit code: End of year mailing only

**Preferred Address: Home**

Country: United States More...

Address lines: 440-A Rivers Avenue

City: Eugene

State: OR Oregon

ZIP: 97504 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	541-555-7564	Shared

This constituent

Is inactive  Is a solicitor Details

Gives anonymously  Has no valid addresses

Requests no email

Supporter (11/13/2003 -)

Education Business Bank

2. Click **Business**. The Organization Relationship screen appears.

The screenshot shows a software window titled "New Organization Relationship for Alexander D. Hamilton". The window has a menu bar with "File", "Edit", "View", "Relationship", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Back", "Forward", "Home", "Help", and "Refresh". The main area is divided into several sections:

- General 1** (selected tab):
  - Org name: Trapman & Associates (with a binoculars icon and "Aliases" button)
  - ID: 117
  - Country: United States (dropdown menu with "More..." button)
  - Industry: Legal (dropdown menu)
  - Address lines: 12 Broad Street (text field)
  - Position: Senior Legal Assistant (dropdown menu with "Print?" checkbox)
  - City: Dayton (text field)
  - Profession: Law (dropdown menu)
  - State: OH (dropdown menu) Ohio (text field)
  - Income: \$80,000 - \$89,999 (dropdown menu)
  - Relationship: Employer (dropdown menu)
  - ZIP: 45406 (text field) DPC: (text field)
  - Reciprocal: Employee (dropdown menu)
  - Date from: 04/08/2000 (calendar icon) to: (calendar icon)
  - Print organization name with address
- Phones/Email/Links** (table):
 

DNC	Type	Number/Email Ad...	Shared?
	Business	937-555-9696	Shared
- For this organization, this individual is a(n):**
  - Employee
  - Primary business information
  - Contact
  - Do not mail to this contact
  - Contact type: (dropdown menu)

3. Select the General 1 tab.
4. In the **Org name** field, click the binoculars and search for "Trapman & Associates". When found and selected, "Trapman & Associates" appears in the **Org name** field.
5. Trapman & Associate's address information and phone numbers appear automatically on the Organization Relationship screen. They default from Trapman & Associate's organization constituent record.

These two addresses are automatically linked, and each relationship record appears on the other's Relationships tab. If you do not want the address to be shared, to manually break the link, select **Relationship, Break link with Trapman & Associates** from the menu bar of the Organization Relationship screen, or select **Relationship, Break link with Trapman & Associates** from the menu bar of the Address screen, accessed when you click **More**. For this scenario, leave the addresses linked.

**Note:** When you search your database and select a nonconstituent organization relationship record instead of an organization constituent record, you must manually enter address and phone number information. To search your database for nonconstituents, mark **Display nonconstituents** on the Open screen.

6. In the **Industry** field, select "Legal". Alexander works for a law firm.
7. In the **Position** field, enter "Senior Legal Advisor".
8. To print the **Position** beside Alexander's name in a mailing, mark the **Print?** checkbox.
9. In the **Profession** field, select "Law".
10. In the **Income** field, select the amount "\$80,000-\$89,000".
11. In the **Relationship** field, select "Employer". In the **Reciprocal** field, select "Employee".
12. In the **Date from** field, enter the date 04/08/2000. This is the date Alexander started to work for Trapman & Associates.



**Note:** If Alexander was a contact for Trapman & Associates, you would mark the **Contact** checkbox. You would then select a **Contact type**. If Alexander was not the Mailing Contact for Trapman & Associates, you would mark the **Do not mail to this contact** checkbox.

13. Make sure **Primary business information** is marked. This designates that Trapman & Associates is Alexander's main workplace.
14. Select the General 2 tab. Because Trapman & Associates is a constituent in your database that matches gifts, the matching gift information appears on this tab. The information defaults from the organization constituent record.

**New Organization Relationship for Alexander D. Hamilton**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

Trapman & Associates matches gifts from Alexander D. Hamilton

Matching Gift Information

Factor: 2.00 Fiscal year starts: 01/01

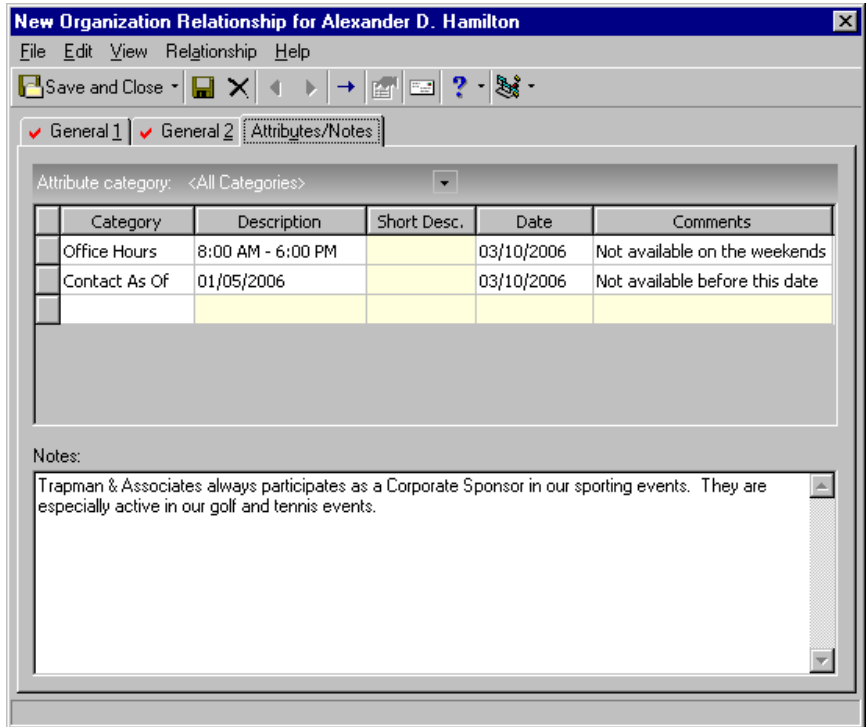
Matching Gift Limits		
	Minimum	Maximum
Per gift	\$25.00	\$500.00
Annual per donor	\$25.00	\$5,000.00
Total per donor	\$25.00	\$50,000.00

Notes:  
Trapman & Associates matches only for full-time employees.

Automatically soft credit this organization for gifts

15. Because Trapman & Associates is a constituent in your database, the **Automatically soft credit this organization for gifts** checkbox also appears. Leave this checkbox unmarked. You do not want to soft credit Trapman & Associates for gifts given by Alexander to your organization. A soft credit allows multiple constituent to share credit for a single gift to avoid duplicate gift records. To soft credit an organization relationship for gifts given by the constituent, mark this checkbox. For more information about soft credits, see the *Gift Records Guide*.

16. Select the Attributes/Notes tab and add any relevant attributes or notes to track about this organization.



17. On the toolbar, click **Save and Close**. You return to the Bio 1 tab of Alexander’s constituent record.

**Tip:** You can use shortcut keys to move around *The Raiser’s Edge* without your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

18. Click **Save and Close**.

▶ **Add a primary bank relationship record from the Bio 1 tab**

From the Bio 1 tab, you can track a constituent’s primary bank or financial institution relationship. The primary bank relationship is usually the financial account from which a constituent contributes gifts to your organization. For example, if a constituent makes recurring gift payments by direct debit, you can list the bank that maintains the constituent’s account as the primary bank. Only one primary bank relationship can exist on an individual constituent record. You can track all other bank and financial institution relationships on the Relationships tab. For more information, see “Bank/Financial Relationships” on page 133.

**Scenario:** Ellen Crenshaw tells you she wants to set up a recurring gift through New York National Bank. She wants to donate \$50 per month to your organization. Before you add any information about donations, enter her banking information from the **Bank** button on the Bio 1 tab of her constituent record.

1. From Ellen Crenshaw’s constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a software interface for a constituent record. The window title is "Ellen H. Crenshaw". The menu bar includes File, Edit, View, Constituent, Letter, Favorites, Tools, and Help. The toolbar contains various icons for file operations and navigation. Below the toolbar is a tabbed interface with the following tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1 (selected), Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The main content area is divided into several sections:

- Biographical:** Last name: Crenshaw, First name: Ellen, Middle name: Hensley, Titles: Ms., Suffixes: (empty), Nickname: Ellie, Maiden name: Forester, ID: 10, Gender: Female, SSN: 212-12-8809, Birth date: 11/07/1959, Age: 45, Marital status: Divorced, Spouse: (empty), Solicit code: Do not phone at work.
- Preferred Address - Home:** Country: United States, Address lines: 87 Park Avenue, City: New York, State: NY, ZIP: 10081, DPC: (empty).
- Phones/Email/Links:** A table with columns DNC, Type, Number/Email Address, and Shared?. One entry is visible: Home, 212-555-0010, Not Shared.
- This constituent:** A set of checkboxes: Is inactive (unchecked), Gives anonymously (unchecked), Requests no email (unchecked), Is a solicitor (checked), Has no valid addresses (unchecked).

At the bottom of the form, there are buttons for "Education", "Business", and "Bank". A status bar at the very bottom shows "Friend (2001 - ); Past Parent (1999 - 2003)".

2. Click **Bank**. The New Bank/Financial Institution screen appears.

**New Bank/Financial Institution for Ellen H. Crenshaw**

File Edit View Bank Help

Save and Close

General Account Attributes/Notes

Transit/Routing no.: 00011111

Financial Institution: New York National Bank

Branch name: Main Branch

Bank notes: If there is a problem with any account, see William Cone, the account manager

Electronic Transfer Information

Immediate origin:

Use Transit/Routing number

Other

Account Information

Account number: 0423 4356 0987

Account type: Checking

Bank/Branch Address

Country: United States

Address lines: 625 Park Avenue

City: New York

State: NY New York

ZIP: 10128

Region: Northeast

Phones/Email/Links		
DNC	Type	Number/Email Address
	Bank	212-555-0088

Primary bank information  This account is inactive

3. Select the General tab.

**Note:** Banking information is stored in *Configuration* under **Financial Institutions**. If the bank you want to add to a constituent’s record is not in the system, add the information from *Configuration*.

4. In the **Financial Institution** field, click the binoculars and search for “New York National Bank”. Once you locate and select this bank, the bank’s information automatically appears in the **Transit/Routing no.** field, the **Branch name** field, the **Bank/Branch Address** frame, the **Phones/Email/Links** grid, **Bank notes** box, and the **Electronic Transfer Information** frame. This information defaults from the bank record set up in *Configuration*.
5. Make sure **Primary bank information** is marked. This designates that this is Ellen Crenshaw’s main bank.
6. In the **Account Information** frame, enter “0423 4356 0987” in the **Account number** field.
7. In the **Account type** field, select “Checking”. This is the type of account Ellen has at New York National Bank.
8. On the Account Attributes/Notes tab, enter any attributes or notes to record about Ellen’s account or the bank, such as that EFT is available.
9. On the toolbar, click **Save and Close**. You return to the Bio 1 tab of Ellen’s constituent record.
10. Click **Save and Close**.

► **Add miscellaneous biographical information on the Bio 2 tab**

**Note:** Credit Cards and Constituent Codes are discussed in later procedures.

The Bio 2 tab tracks additional or miscellaneous constituent data. In *The Raiser's Edge*, this diverse information includes income, ethnicity, religion, and birthplace.

**Scenario:** During your organization's Open House, Alexander Hamilton completes your annual survey of biographical information. He includes optional miscellaneous information, such as his income level, ethnicity, religion, and birthplace. Enter this information on the Bio 2 tab of Alexander's constituent record.

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without your mouse. For example, press **ALT + 2** on your keyboard to select the Bio 2 tab.

1. From Alexander Hamilton's constituent record, select the Bio 2 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

The screenshot shows the 'Alexander D. Hamilton' constituent record in The Raiser's Edge software. The Bio 2 tab is selected. The form contains the following fields and values:

- Target: \$5,000 - \$9,999
- Income: \$90,000 - \$99,999
- Receipt type: One receipt per gift
- Birthplace: Houston, TX
- Religion: Methodist
- Ethnicity: White (not Hispanic origin)

Below the form are two tables:

Card Type	Cardholder Name	Credit Card No.	Expiration	Reference

Constituent Codes			
Description	Code	Date From	Date To
Supporter	SUP	11/13/2003	

2. In the **Target** field, select "\$5,000 - \$9,999". This is the range in dollars you hope to persuade Alexander to give your organization.
3. In the **Income** field, select "\$80,000-\$89,999". This is the range of Alexander's salary.
4. In the **Receipt type** field, select "One receipt per gift", as the constituent requested.
5. In the **Birthplace** field, enter "Houston, Texas".
6. In the **Religion** field, select "Methodist".
7. In the **Ethnicity** field, select "White".
8. On the toolbar, click **Save and Close**.

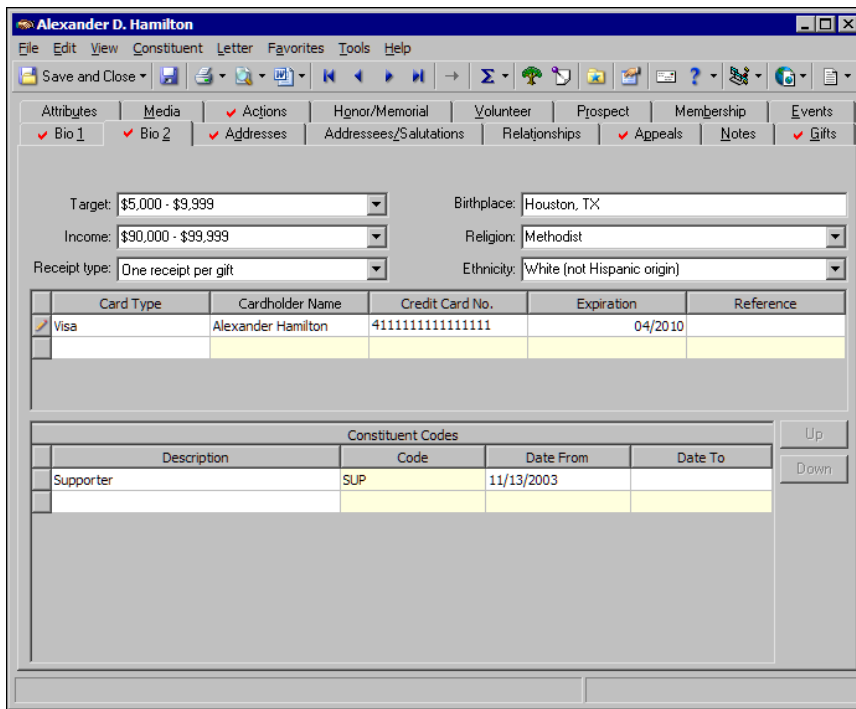
► **Add a constituent credit card on the Bio 2 tab**

If a constituent regularly contributes to your organization by credit card, you can use the Bio 2 tab to track the card type, cardholder name, and expiration date. By maintaining current credit card data, you save time and eliminate possible data entry errors each time the constituent donates.

**Scenario:** Alexander Hamilton indicates he will make regular donations to your organization by credit card. On the Bio 2 tab, enter the credit card information.

**Note:** To delete rows from the Credit Card grid, select the rows to delete, right-click, and select **Delete Rows**. A message appears to ask whether to delete the rows. Click **OK**. To insert a row, select **Insert Row** from the menu. The new row appears above the row you select.

1. From Alexander Hamilton’s constituent record, select the Bio 2 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.



**Tip:** When you add a new gift record, if you select a pay method of Credit Card, you can click in the **Card type** field on the gift record and press **F7** on your keyboard to access the Credit Card screen. On this screen, all credit cards entered on the Bio 2 tab appear.

2. In the first row of the **Card Type** column, select “Visa”.
3. In the first row of the **Cardholder Name** column, enter the name of the cardholder exactly as it appears on the credit card.
4. In the first row of the **Credit Card No.** column, enter number “4111111111111111”.
5. In the first row of the **Expiration** column, enter the date “04/2010”.
6. If you have additional information to track about this credit card, enter it in the **Reference** column.
7. On the toolbar, click **Save and Close**.

**Note:** *The Raiser's Edge* requires Internet access to connect to the Blackbaud *Payment Service*. If *The Raiser's Edge* cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser's Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** column displays a masked credit card number, with only the last four digits visible.

► **Add a constituent code on the Bio 2 tab**

**Warning:** Do not use too many constituent codes. Make sure each constituent code conveys useful information. Avoid generic codes such as Donor, Prospect, and Organization. Make sure your constituent codes aptly explain the relationship a constituent has with your organization.

Constituent codes define the relationship a constituent has with your organization, such as Current Parent, Friend, Alumnus, and Board Member. In other words, a constituent code tells you why the constituent is in your database. Each constituent record in your database should have at least one constituent code listed. If you list multiple constituent codes, always list the most important active constituent code first. *The Raiser's Edge* recognizes the first code listed as the primary constituent code.

---

**Scenario:** Heather Faulkner recently expressed an interest in becoming a volunteer for your organization. On the Bio 2 tab of Heather's record, add a Volunteer constituent code and date information.

**Note:** To delete rows from the **Constituent Codes** grid, select the rows to delete, right-click, and select **Delete Rows**. A message appears to ask whether to delete the rows. Click **OK**. To insert a row, select **Insert Row** from the menu. The new row appears above the row you select.

1. From Heather Faulkner’s constituent record, select the Bio 2 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

**Note:** To adjust the position of the Constituent Codes in the grid, use the **Up** and **Down** buttons. The constituent code listed first is considered the primary constituent code.

2. In the **Constituent Codes** grid, in the first empty row of the **Description** column, select “Volunteer”.
3. Tab through to the **Date From** column. “VOL” appears automatically in the **Code** column.
4. In the first row of the **Date From** column, press **F3** on your keyboard for today’s date. If this code is valid for the constituent for a predetermined time period, you can enter a date in the **Date To** field.
5. On the toolbar, click **Save and Close**.

## Organization Records

**Tip:** You can view recently accessed constituent records by selecting **File, Recently Accessed Constituents** from the menu bar of a constituent record.

Two types of constituent records exist in *The Raiser’s Edge* — individual records that maintain information about people in your database, and organization records that track important data about companies and businesses in your database. In this section, we focus on Organization records. We include details about various parts of the record, instructions for the correct way to add biographical data, and discussions about the impact data has on other areas in your database.

The Org 1 and Org 2 tabs of an organization record hold a tremendous amount of information. Accurate data entry and a clear understanding of each field is vital to build and maintain a clean, consistent database.

One of the most important, and only required, pieces of data on an organization record is the name. Although this may seem simple and straightforward, we recommend you pay special attention to how and where you enter data. We recommend you enter the name on the Org 1 tab exactly how you want it to appear in mailings and reports. For example, if you enter the name “BLACKBAUD, INC.” in all upper-case letters, that is how it appears throughout *The Raiser’s Edge*.



On the Org 1 tab, the **Org name** field appears, so you can enter the organization name. When you enter a name, remember that accuracy is vital.

Org Name:

When you enter an organization name, you can use a backslash (\) immediately before the word you want **The Raiser's Edge** to use to locate the organization. For example, enter The Flower Patch as "The\Flower Patch". With the backslash between "The" and "Flower", you can search for the record by "Flower" instead of "The". The record is also alphabetized under "F" for reports and queries.

**Note:** An organization can have multiple aliases. You can enter multiple aliases on the Aliases screen.

If the organization has an alias to track, click **Aliases**. The Aliases screen appears, so you can enter the alternate name for the constituent into the grid. Aliases help in record searches. For example, you create a record for the United Broadcast Company and enter "UBC" in the **Alias** column and "Acronym" in the **Type** column. You can now use this name during the search process to help you quickly access the record. When you run a constituent search, on the Open screen, mark **Check aliases** to use aliases in the search.

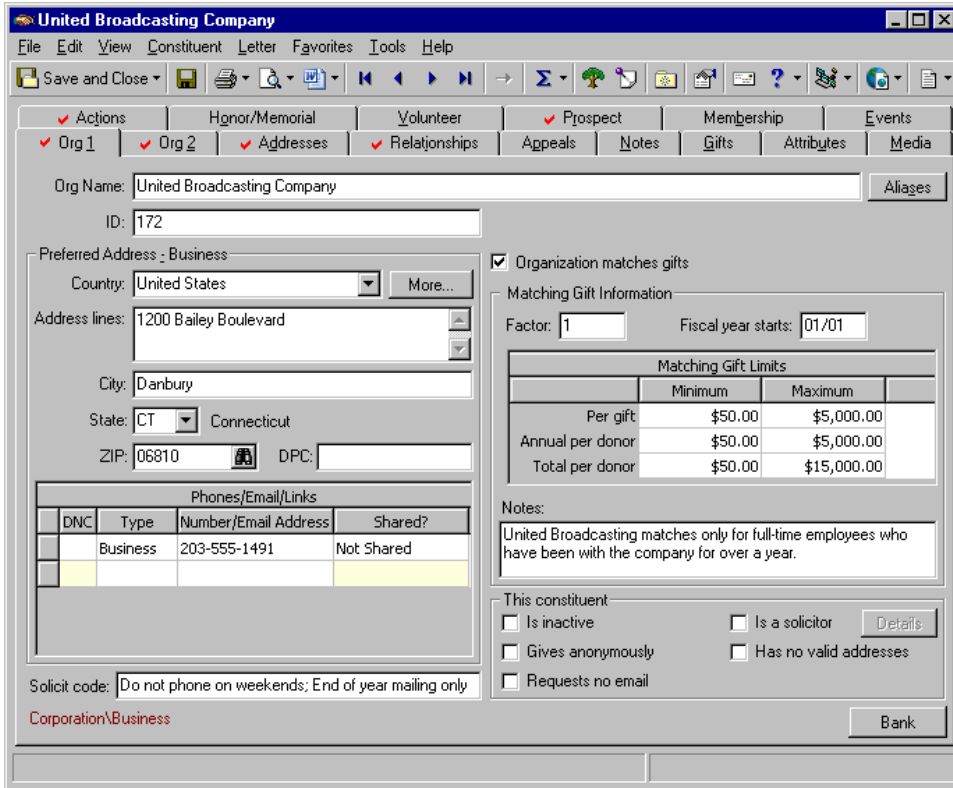
**Aliases** ✕

You can use aliases when you search for a constituent.

	Alias	Type
<input type="checkbox"/>	UBC	Acronym
<input type="checkbox"/>		

**Note:** When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen, accessed from the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

Once you correctly establish the name on the record, the focus switches to the rest of the Org 1 tab. This tab is very important and houses a tremendous amount of data. This is where you track the constituent’s unique ID number, preferred address, phone numbers, email addresses, matching gift information, solicit codes, and banking information. This tab holds what we consider basic biographical information. All this data is not required by *The Raiser’s Edge*, but it helps you get to know an organization on a more advanced level. This can result in additional or larger donations due to successful soliciting techniques.



**Note:** Once you add an organization constituent record to your database, to view the properties of the constituent record, select **File, Properties** from the menu bar of the record. Properties tell you the system record ID, the date the record was added, who added it, the date the record was last changed, the import ID, and the constituent ID.

To stay in touch with organizations, you must maintain accurate address and telephone information. *The Raiser’s Edge* helps track multiple addresses for each organization. You can indicate current and past addresses and add attributes to track extra address information. You can designate which addresses should receive mail and which are for informational purposes only. For example, if the organization has a main contact you deal with on a regular basis, you may want to send all mailings to her office, while listing the organization’s head office address for informational purposes only. The address found on the Org 1 tab is always the preferred address (the address where the constituent prefers to receive mail). If you add an address from the Org 1 tab, that address is automatically marked as the preferred address. For more information about adding addresses, see “Addresses” on page 86.

Solicit codes provide a convenient method to flag constituents as “exceptions to the rule” for your solicitors. These codes tell your solicitors that an organization has certain rules or conditions to follow. These rules can be used to add or remove an organization from a solicitation. For example, an organization may not want to be solicited by telephone, so you can add a solicit code of “Do not phone” to its constituent record.

**Tip:** You can print a constituent or organization profile right from a constituent record. From the menu bar of an organization constituent record, select **File, Print, Constituent Profile** or **Organization Profile**. The Select a Parameter file screen appears. Select a parameter file and click **Select**. If a parameter file does not exist, click **Add New** to add one. You can also add parameter files from **Profiles, Lists, and Directories** on the Reports page. All parameter files added there appear on the Select a Parameter file screen. You can also export, preview, and send a profile as email from the **File** menu. For information about profiles and how to add parameter files, see the *Reports Guide*.

The Org 1 tab is also a place to track an organization's matching gift information. This information indicates whether the organization participates in matching gift donations and under what stipulations. Matching gifts are contributions by organizations as matching donations for gifts contributed by their employees. On the Org 1 tab, you track this valuable matching gift information, such as a factor, when the fiscal year starts, minimum and maximum match amounts, and any special notes. Researching and tracking an organization's matching gift criteria is one of the best and most effective ways to increase your organization's total donations. For more information about matching gifts, see the Matching Gifts chapter of the *Gift Records Guide*.

From the Org 1 tab, you can also track an organization's primary bank or financial institution relationship. The primary bank relationship is usually the financial account from which a constituent contributes gifts to your organization. For example, if United Broadcasting Company makes pledge payments by check, you can list the bank that maintains the constituent's account as the primary bank. When you use *Electronic Funds Transfer*, the **Bank** button also stores important electronic funds transfer information. You can track additional financial institution relationships on the Relationships tab. For more information about *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

**New Bank/Financial Institution for United Broadcasting Company**

File Edit View Bank Help

Save and Close Save Close Previous Next Print Help Refresh

General Account Attributes/Notes

Transit/Routing no.: 00033333

Financial Institution: Federal Credit Union

Branch name: Federal Credit Union - Southeast

Bank notes: FCU does accept EFT payments.

Electronic Transfer Information

Immediate origin:

Use Transit/Routing number

Other

Account Information

Account number: 2345 0987 1010

Account type: Checking

Bank/Branch Address

Country: United States

Address lines: 1402 Rivers Avenue

City: Charleston

State: SC South Carolina

ZIP: 29407

Region: Southeast

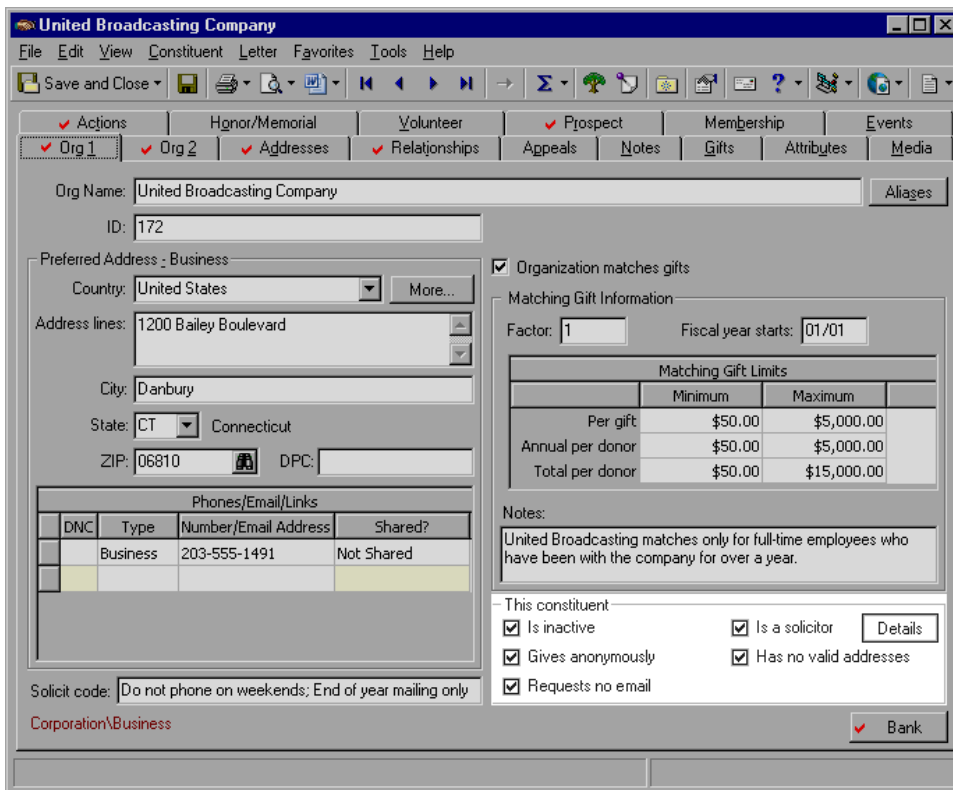
Phones/Email/Links		
DNC	Type	Number/Email Address
	Bank	800-555-9918

Primary bank information  This account is inactive

The Org 1 tab is also the place to indicate that organizations are inactive, are solicitors, have no valid addresses, usually contribute gifts anonymously, or request to receive no email. These checkboxes are very simple to use, but have very powerful results. The checkboxes default to unmarked when a new record is created.

When you mark **This constituent - Is inactive**, this makes the constituent inactive throughout the entire program. This means you can manually search for and access the record from *Records*, but it is excluded from any automatic program searches like *Query*, *Mail*, or *Reports*. For historic purposes, we recommend you mark this checkbox rather than permanently delete a constituent from your database.

When you mark **This constituent - Is a solicitor**, the **Details** button is enabled. When you mark this checkbox, you tell *The Raiser's Edge* that this constituent is a solicitor. The record can now be associated with other constituents' gifts, pulled into solicitor reports, and considered for queries containing solicitor filters. For more information about solicitors, see "Solicitors" on page 291.



When you mark **This constituent - Gives anonymously**, the program automatically marks **Gift is anonymous** on the Miscellaneous tab of a gift record when you add a new gift for this constituent. This saves time with data entry and helps eliminate errors with gift records. For more information about how to add gifts, see the *Gift Records Guide*.

When you mark **This constituent - Has no valid addresses**, you indicate that even though addresses exist on the record, none are valid. When you mark this checkbox, you eliminate these records from mailings and reports. However, you can select to include them based on this checkbox. Most reports and mail functions have a checkbox to include **Constituents with no valid addresses**. Marking this checkbox includes them for the current report or mailing.

When you mark **This constituent - Requests no email**, you indicate that the constituent does not want to be contacted by email. When you mark this checkbox, the organization will not receive any email through the **Global Add Records** email function or through **RE:NetMail** in *NetSolutions*. This checkbox indicates the organization receives no email, not the organizational contact. For more information about Global Add, see the Global Add chapter of the *Global Add, Delete, & Change Guide*. For more information about *NetSolutions*, see the *NetSolutions Guide*.

The Org 2 tab tracks additional, or miscellaneous, constituent data. This is extra information that helps you build working files on your organizations. This diverse information includes the parent corporation, target level, income level, number of employees, number of subsidiary companies, and industry. You can query on all this data for grouping purposes, or use it in analytical reports to provide visual statistics about the breakdown of your database.

You can also track the type of receipt the organization wants to receive. Maybe, the constituent requests one receipt per gift or decides to receive consolidated receipts. Your selection on the Org 2 tab determines the type of receipts the constituent receives when you run the Receipts mail task from *Mail*. For more information about receipting in *Mail*, see the *Mail Guide*.

On the Org 2 tab, a very useful area in particular is the credit card grid. If an organization regularly contributes to your organization by credit card, you can use this grid to track the card type, cardholder name, credit card number, and expiration date. When you add a new gift record, if you select a pay method of Credit Card, you can click in the **Card type** field on the gift record and press **F7** on your keyboard to access the Credit Card screen. On this screen, all credit cards entered on the Org 2 tab appear. You can quickly and easily select the appropriate card. By maintaining current credit card data, you save time and eliminate possible data entry errors each time the constituent donates.

The bottom half of the Org 2 tab contains the **Constituent Codes** grid. Constituent codes define the relationship a constituent has with your organization. In other words, a constituent code tells you why the constituent is in your database. Examples of constituent codes include Foundation, Trustee, and Friend. Each constituent record in your database should have at least one constituent code. In addition to defining the relationship a constituent has with your organization, constituent codes are used in queries, reports, mail tasks, and security. For example, you want to send a letter to all your foundations to announce a change in a scheduled meeting. You first create a query of all records with a constituent code of Foundation, and then use *Mail* to generate a letter. Or, you can go directly to *Mail* and specify in your parameters that you only want records with a constituent code of Foundation to be considered for the mailing. You can also generate reports broken down by constituent code, so you can see which group — Foundation, Trustee, or Friend — contributes the most money.

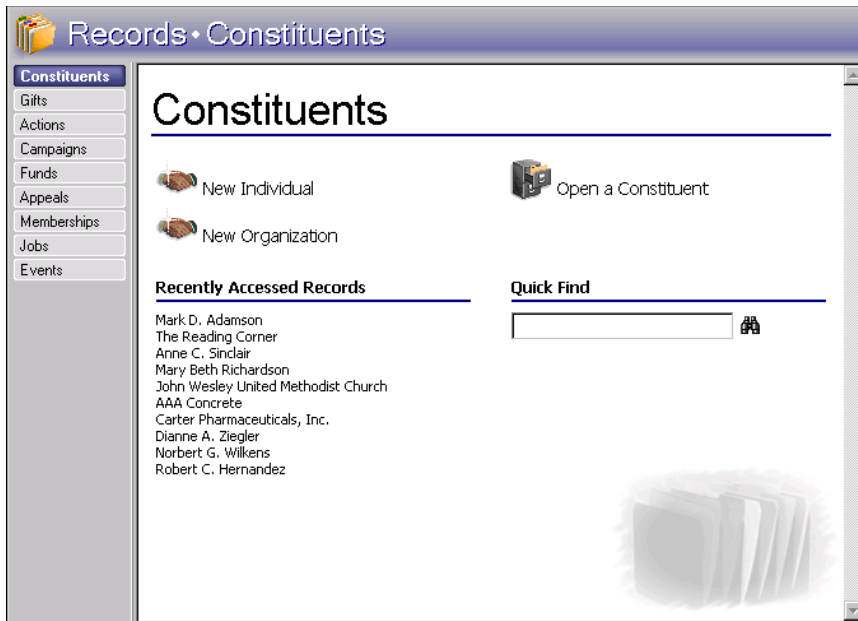
The Org 1 and Org 2 tabs of an organization record hold a tremendous amount of information. Accurate data entry and a clear understanding of each field is vital to building and maintaining a clean, consistent database. We recommend you take the time to go through these scenarios and procedures to gain a solid understanding.

► **Add an organization constituent record**

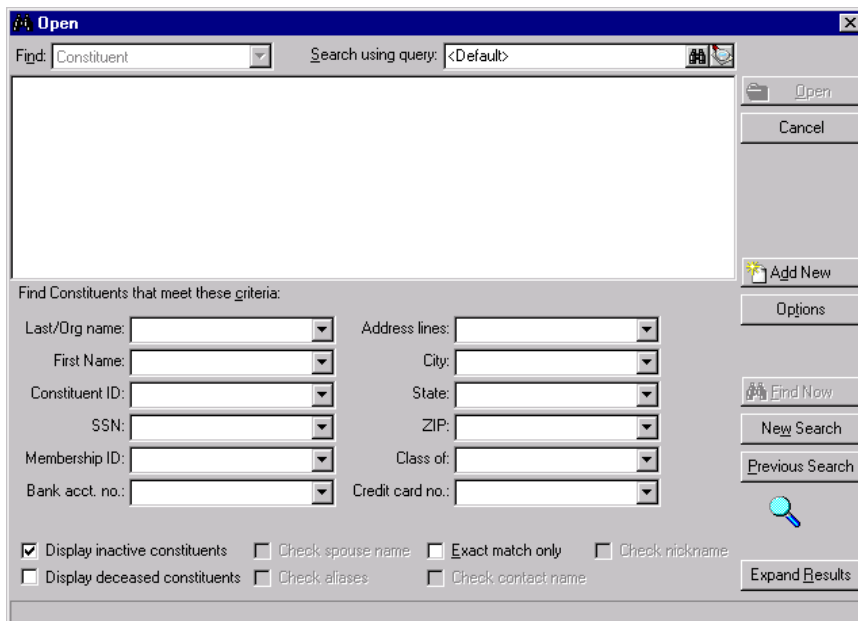
You can add a new organization constituent record from the shell **File** menu, from the **File** menu of an existing organization constituent record, and from *Records*. We recommend you add and open records from *Records* because it allows the easiest and most complete access to all record types.

**Tip:** You can quickly enter multiple constituent records in a batch. For more information about the batch entry of constituent records, see the Constituent Batch chapter of the *Batch Guide*.

1. On the Raiser’s Edge bar, click **Records**.
2. Click the **Constituents** button. The Constituents page appears.



3. Click **Open a Constituent**. The Open screen for constituents appears. To avoid adding duplicate records, you should first search your database for the constituent before adding a new record to your database.



- Under **Find Constituents that meet these criteria**, enter the organization name in the **Last/Org name** field.

**Tip:** On the Open screen, you can click **Add New** to add a new organization constituent record.

- Click **Find Now**. If the program does not find a match, you can now enter a new organization without creating a duplicate record.

In *The Raiser's Edge*, required fields appear in aqua by default. You can change the default color on the Color tab of User Options. For more information about setting this and other preferences in User Options, see the *Program Basics Guide*. Note:

- On the Open screen, click **Add New**. Select **Organization**. A blank organization record appears.

The screenshot shows the 'New Organization' window with the following sections:

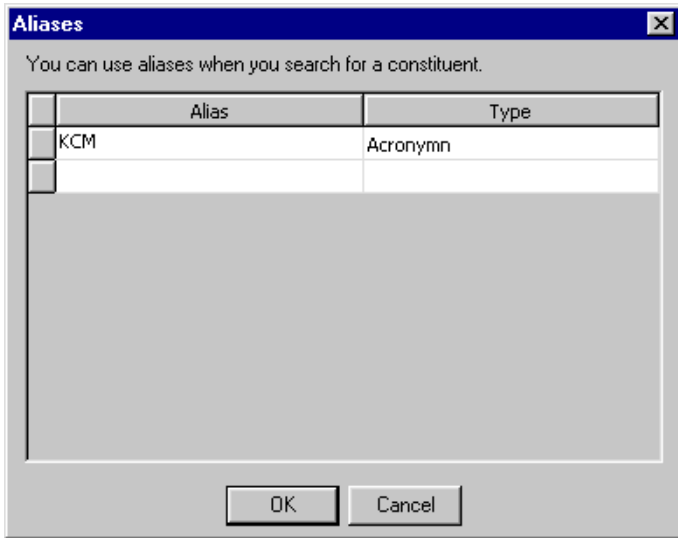
- Org Name:** Text field with an 'Aliases' button.
- ID:** Text field.
- Preferred Address - Business:**
  - Country: United States (dropdown)
  - Address lines: Text area
  - City: Text field
  - State: (dropdown)
  - ZIP: Text field with a location pin icon
  - DPC: Text field
- Organization matches gifts:**
- Matching Gift Information:**
  - Factor: Text field
  - Fiscal year starts: Text field
  - Matching Gift Limits Table:**

	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		
- Notes:** Text area
- This constituent:**
  - Is inactive
  - Is a solicitor (with 'Details' button)
  - Gives anonymously
  - Has no valid addresses
  - Requests no email
- Solicit code:** Text field
- Bank:** Button

**Note:** You can use a backslash (\) immediately before the word you want *The Raiser's Edge* to use to locate the organization. For example, enter The Charleston Yacht Club as "The\Charleston Yacht Club". With the backslash between "The" and "Charleston", you can search for the record under "Charleston" instead of "The". The record is also alphabetized under "C" for reports and queries.

- In the **Org name** field, enter "Kitsap County Museum".
- In the **ID** field, enter a constituent identification number. If you set the business rule in *Configuration*, *The Raiser's Edge* automatically generates a unique ID. We recommend you set this rule to eliminate errors and duplicate IDs. For more information about how to set up business rules, see the *Configuration & Security Guide*.

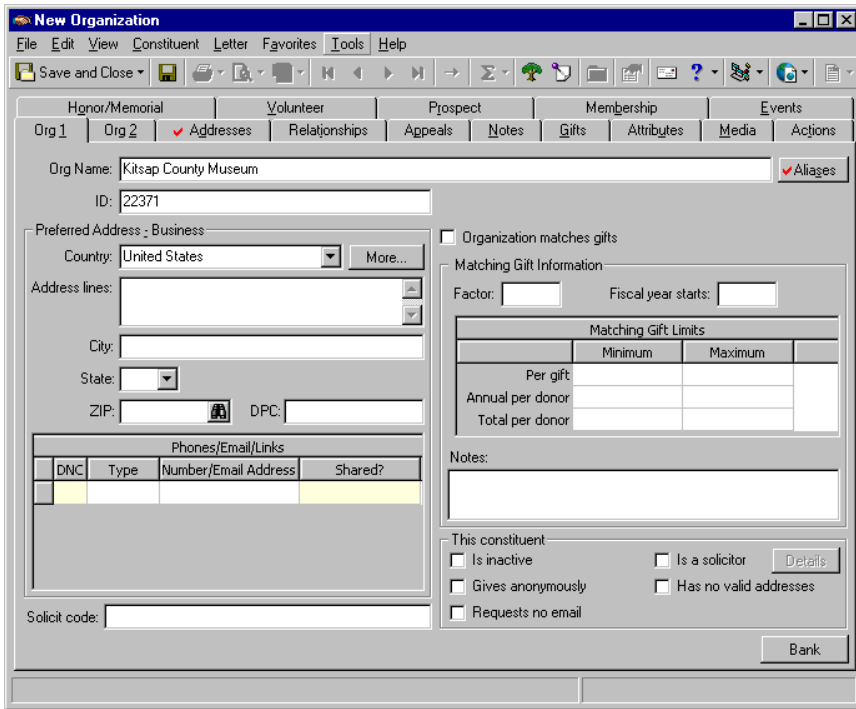
- Click **Aliases**. The Aliases screen appears. Aliases and alternate names help in record searches, but are not required.



- In the **Alias** column, enter “KCM”. In the **Type** column, select “Acronym”. When you run constituent searches, to search for the constituent by this alias, mark **Check aliases** on the Open screen.

**Note:** The ID is unique to this constituent and can be used to both identify the constituent and locate the record. All constituent records in your database should have an ID number.

- Click **OK**. You return to the Org 1 tab of the constituent record.



**Note:** After you enter data in the name fields, *The Raiser’s Edge* checks the database for duplicates based on the **Business Rules** you set up in *Configuration*.

- On the toolbar, click **Save and Close**.



► **Add a constituent address from the Org 1 tab**

The maintenance of the current address, email, and telephone information on your organization records is extremely important to your fundraising efforts. The address found on the Org 1 tab is always the preferred address (the address where the constituent prefers to receive mail). When you add an address from the Org 1 tab, the program automatically marks that address as the preferred address. An organization constituent record can have only one preferred address. For more information about how to add alternate addresses, see “Managing Mailing Information” on page 86.

**Scenario:** United Broadcasting Company requests to sponsor your upcoming spring event. On their information card, they list a preferred address and phone number. Enter the address, city, state, ZIP, and phone number on the Org 1 tab of United Broadcast Company’s record.

**Note:** When the address is linked to another constituent record, a link icon appears on the **More** button.

1. From United Broadcasting Company’s constituent record, select the Org 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a software window titled "United Broadcasting Company" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Actions, Org 1, Org 2, Addresses, Relationships, Appeals, Notes, Gifts, Attributes, and Media. The "Org 1" tab is selected.

The form contains the following fields and sections:

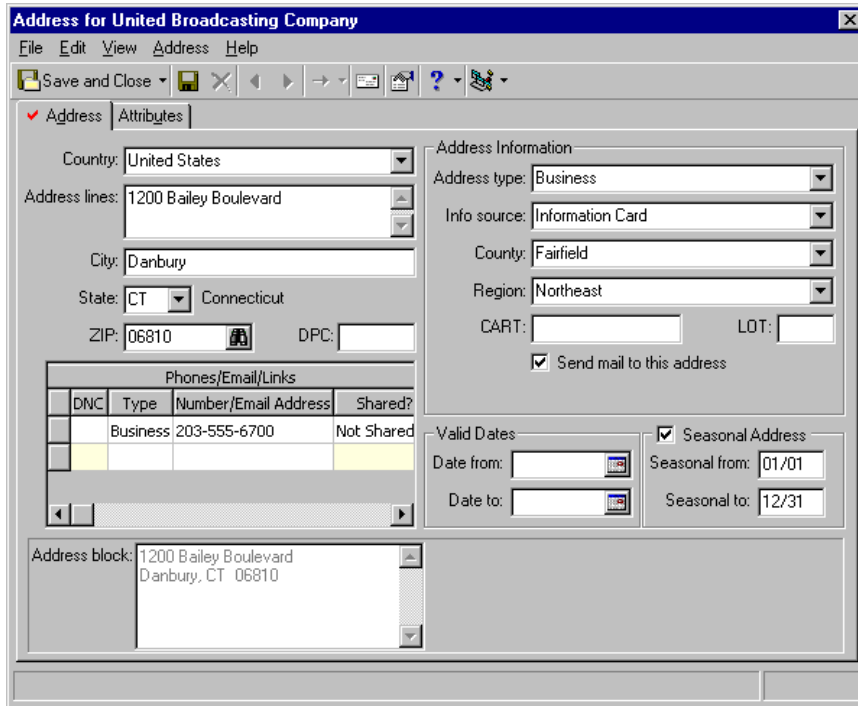
- Org Name: United Broadcasting Company
- ID: 172
- Preferred Address : Business
  - Country: [Dropdown]
  - Address lines: [Text area]
  - City: [Text field]
  - State: [Dropdown]
  - ZIP: [Text field]
  - DPC: [Text field]
- Organization matches gifts: 
  - Matching Gift Information:
    - Factor: 1
    - Fiscal year starts: 01/01
  - Matching Gift Limits table:
 

	Minimum	Maximum
Per gift	\$50.00	\$5,000.00
Annual per donor	\$50.00	\$5,000.00
Total per donor	\$50.00	\$15,000.00
  - Notes:
 

United Broadcasting matches only for full-time employees who have been with the company for over a year.
  - This constituent:
    - Is inactive
    - Is a solicitor
    - Gives anonymously
    - Has no valid addresses
    - Requests no email
- Solicit code: Do not phone on weekends; End of year mailing only
- Corporation\Business
- Bank:

**Warning:** For data entry consistency, we recommend you click **More** and add your address information in the appropriate fields on the Address screen.

2. Click **More**. The Address for United Broadcasting Company screen appears.



3. In the **Country** field, select “United States”. The country selected determines the fields that appear on the Address screen. For example, if you select “Canada” instead of “United States”, the **State** and **ZIP** fields change to **Province** and **Postal Code**.

**Tip:** Once you enter an email address in the **Phones/Email/Links** grid, you can click the email address to send an email directly from the grid. The Email screen appears, so you can compose and send your message. Once you send the email, an action is recorded on the Actions tab of the constituent record.

4. In the **Address lines** field, enter “1200 Bailey Boulevard”.
5. In the **City** field, enter “Danbury”; in the **State** field, select “CT”; and in the **ZIP** field, enter “06810”.
6. In the first row of the **Phones/Email/Links** grid, select “Business” in the **Type** column, and enter the phone number 203-555-6700 in the **Number/Email Address** column.
7. In the **Shared** column, “Not Shared” appears by default beside this new phone number. This means that in *Configuration Tables*, in Phone Types, on the Edit Phone Types screen for Business phone numbers, you left **Do not share phones of this type** unmarked. This selection enables this phone type to be shared if you later copy and link the address with another constituent or relationship record. If you do not want this Business phone number to be shared, select “Do Not Share” in this column. In *Configuration Tables*, if you had marked **Do not share phones of this type** for this phone type, “Cannot be Shared” appears in the **Shared** column beside the phone number, and the field would be locked. For more information about how to copy and share addresses and phone sharing, see “Copying and linking an address from one constituent record to another” on page 95, “Copying and Linking Relationship Addresses” on page 146, and “Phone Sharing” on page 157.

**Note:** In the **Phones/Email/Links** grid, you can enter phone number, email addresses, and website addresses.

8. In the first row beside this Business phone number, leave the checkbox in the **DNC** column unmarked. This is United Broadcasting’s preferred phone number and they ask to be contacted at this number.

DNC stands for “Do Not Contact.” When you mark this checkbox beside a phone number or email address, a visual warning appears in the column. This warning tells you the constituent does not want to receive phone calls at the number or messages at the email address.

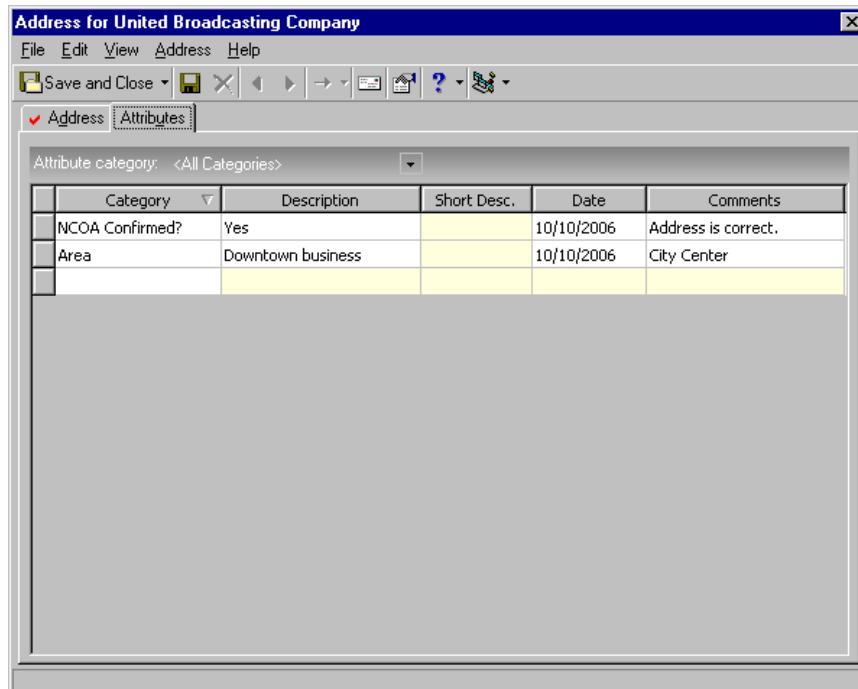
9. In the **Address type** field, select “Business”.

**Note:** In the **CART** field, you can enter the carrier route (CART). The carrier route appears as the endorsement line and can be used to sort mailings for further discounts. In addition, you can enter a line of travel (LOT) to use with the CART in the endorsement line.

10. In the **Info source** field, select “Information Card”. This is how you got United Broadcasting’s address and phone numbers.
11. In the **County** field, select “Fairfield”.
12. In the **Region** field, select “Northeast”.
13. Mark **Send mail to this address**. This is a valid address to receive mailings.
14. If this address is valid only for a specific period of time, under **Valid Dates** frame, enter dates in the **Date from** and a **Date to** fields. If the address is current, leave the **Date to** field blank.
15. Mark **Seasonal Address**. To notate this address is good all year round, in the **Seasonal from** field, enter “01/01”. In the **Seasonal to** field, enter “12/31”.

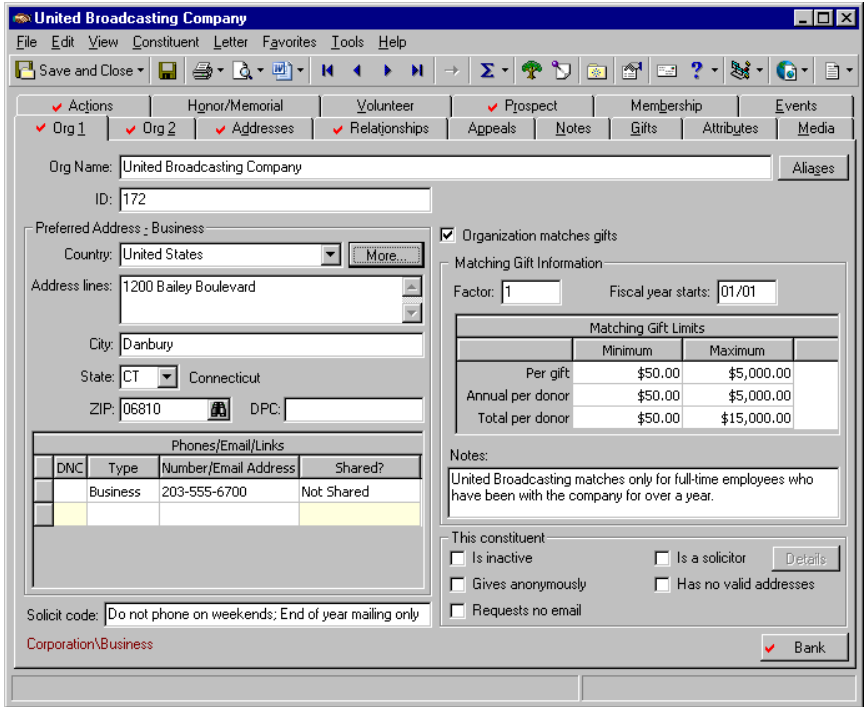
**Note:** *Mail* uses this information to include and exclude constituents from mailings, so accurate data entry is vital to a successful mailing.

16. Select the **Attributes** tab. Enter any attributes to track about this address. For more information about how to add attributes, see “Attributes” on page 176. Once you learn to track attributes in one part of *The Raiser’s Edge*, it is easy to apply those principles to other places in the program.



**Note:** When you change an address and save your changes, if the address is linked to other records, a message appears to inform you that the address is shared. You can select to change the address on all records that share the address or on only this record, or click **Cancel**. To help determine whether to change the address, you can click **Show Shared Addresses** to view a list of records that share the address.

- On the toolbar, click **Save and Close**. You return to the Org 1 tab of United Broadcasting Company’s constituent record. The address and phone information appear on the tab.



- Click **Save and Close**.

► **Add a solicit code on the Org 1 tab**

**Warning:** We recommend you use solicit codes only as “exceptions to the rule” to help maintain the effectiveness of the solicit codes. For example, do not create a code of “OK to phone” in response to a “Do not phone” code.

Solicit codes provide a convenient method to flag organizations as “exceptions to the rule” for your solicitors. These codes tell your solicitors that a constituent has certain rules or conditions to follow. These rules can be used to add or remove a constituent from a solicitation. For example, a business may request to be solicited only by mail, so you can add a solicit code of “Do not phone” to their constituent record.

**Scenario:** Carter Pharmaceuticals attaches a note to its most recent donation, asking to be solicited only once a year. Enter this information in the **Solicit code** field on the Org 1 tab.

1. From Carter Pharmaceutical’s constituent record, select the Org 1 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a software window titled "Carter Pharmaceuticals, Inc." with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Org 1, Org 2, Addresses, Relationships, Appeals, Notes, Gifts, Attributes, and Media. The "Org 1" tab is selected.

The form contains the following fields and sections:

- Org Name: Carter Pharmaceuticals, Inc. (with an Aliases button)
- ID: 138
- Preferred Address: Business
  - Country: United States (with More... button)
  - Address lines: 209 Low Blvd.
  - City: Wilmington
  - State: DE (with Delaware dropdown)
  - ZIP: 19850 (with DPC field)
- Organization matches gifts: 
  - Matching Gift Information:
    - Factor: 1
    - Fiscal year starts: 01/01
  - Matching Gift Limits table:
 

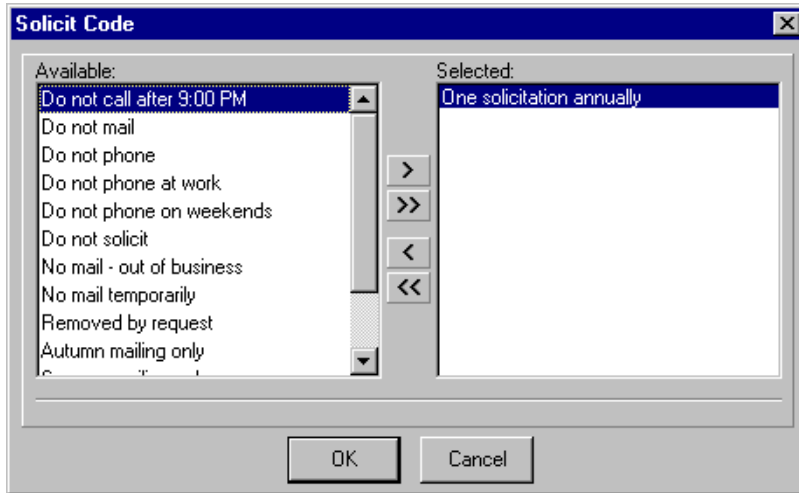
	Minimum	Maximum
Per gift	\$25.00	\$5,000.00
Annual per donor	\$25.00	\$5,000.00
Total per donor	\$25.00	\$15,000.00
  - Notes: Must be full time
  - This constituent:
    - Is inactive
    - Is a solicitor (with Details button)
    - Gives anonymously
    - Has no valid addresses
    - Requests no email
- Solicit code: (empty field)
- Matching Gift Company: Corporation\Business (with a Bank button)

At the bottom, there is a table for "Phones/Email/Links":

DNC	Type	Number/Email Address	Shared?
	Business	302-555-6260	Shared

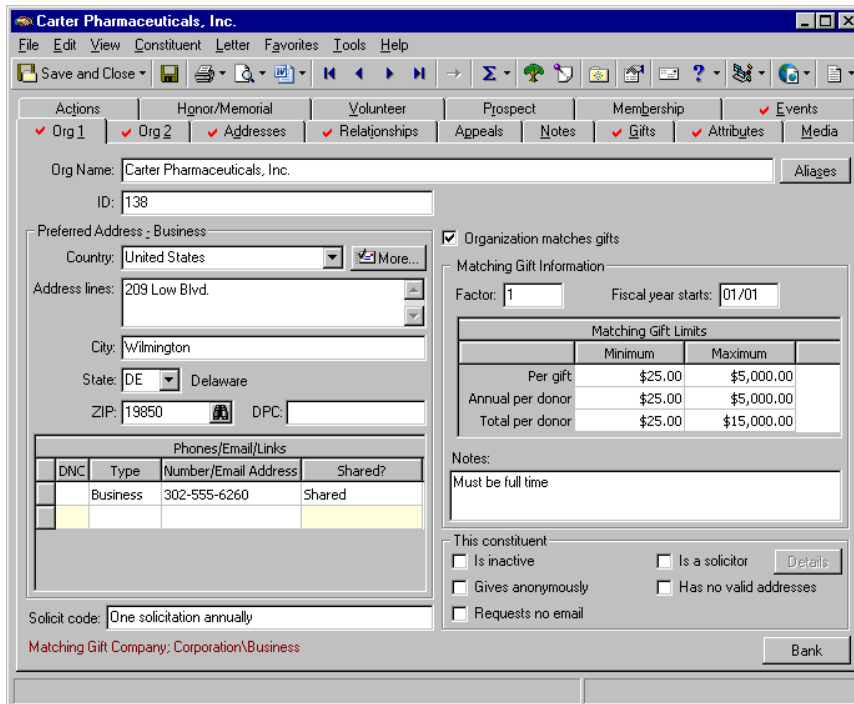
**Note:** In *Mail*, on the Filters tab of a mail task, you can use solicit codes to help limit the records included in a mailing. For example, you may decide to filter on the selected solicit code of “Removed by request” so you can quickly identify those constituents who do not want to be solicited. For more information about the Filters tab of a mail task, see the *Mail Guide*.

- Click in the **Solicit code** field and press **F7** on your keyboard. The Solicit Code screen appears.



**Tip:** On a screen with a selection box, you can use the single right and left arrows to move one entry back and forth between the two boxes. You can use the double left or right arrows to move all entries at once.

- Select “One solicitation annually” in the **Available** grid and click the single right arrow. “One solicitation annually” moves to the **Selected** grid.
- Click **OK**. You return to the Org 1 tab. “One solicitation annually” now appears in the **Solicit code** field.



- On the toolbar, click **Save and Close**.

► **Add matching gift information on the Org 1 tab**

Matching gifts are contributions by organizations as matching donations for gifts contributed by their employees. The Org 1 tab helps you track valuable matching gift information, such as a factor, when the fiscal year starts, maximum and minimum match amounts, and special notes. For more information about matching gifts, see the Matching Gifts chapter of the *Gift Records Guide*.

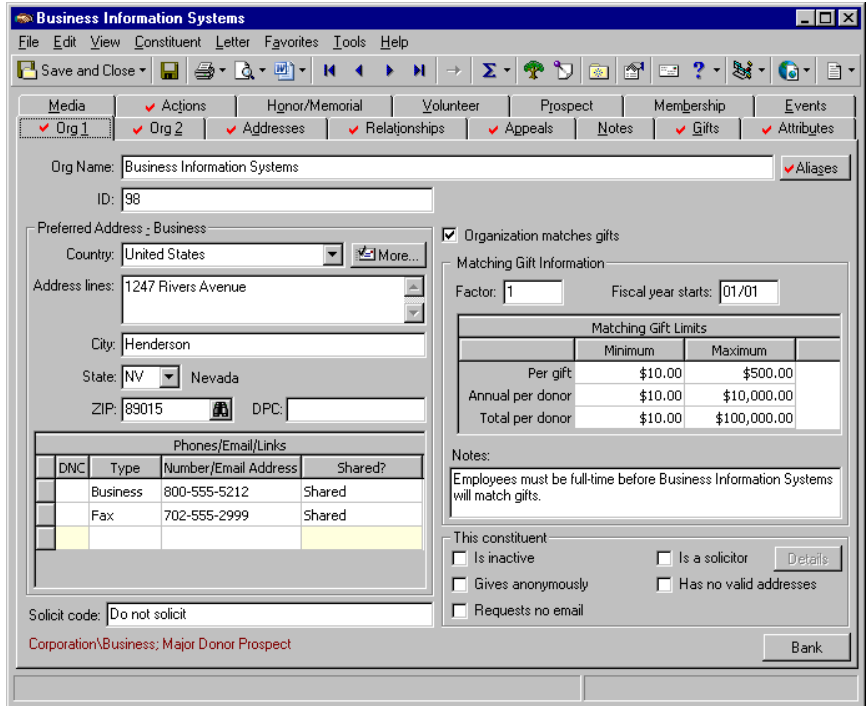
**Scenario:** Business Information Systems indicates they match gifts given by their employees to your organization. In the matching gifts section, on the Org 1 tab of Business Information Systems' constituent record, indicate the factor, when the fiscal year starts, the maximum and minimum limits, and any special notes that apply.

1. From Business Information Systems' constituent record, select the Org 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

The screenshot shows the 'Business Information Systems' software interface. The 'Org 1' tab is selected, displaying the constituent record for 'Business Information Systems'. The 'Matching Gift Information' section is visible, containing a 'Factor' field, a 'Fiscal year starts' field, and a 'Matching Gift Limits' grid. The grid has columns for 'Minimum' and 'Maximum' and rows for 'Per gift', 'Annual per donor', and 'Total per donor'. A 'Notes' field is also present. At the bottom, there are checkboxes for 'Is inactive', 'Is a solicitor', 'Gives anonymously', 'Has no valid addresses', and 'Requests no email'. A 'Bank' button is located at the bottom right.

2. Mark **Organization matches gifts**.
3. In the **Factor** field, enter "1". A factor of 1 indicates the company matches gifts evenly; an employee gives \$100, the company matches the gift with \$100.
4. In the **Fiscal year starts** field, enter "01/01".
5. In the **Matching Gift Limits** grid, define the minimum and maximum limits for all gift amounts the company matches.
  - a. In the **Per gift** row, under **Minimum**, enter "\$10"; under **Maximum**, enter "\$500". Business Information Systems matches as little as \$10 per donation from each employee and as much as \$500 per donation.
  - b. In the **Annual per donor** row, under **Minimum**, enter "\$10"; under **Maximum**, enter "\$10,000". Business Information Systems matches as little as \$10 per annual donation from each employee and as much as \$10,000 per annual donation.

- c. In the **Total per donor** row, under **Minimum**, enter “\$10”; under **Maximum**, enter “\$100,000”. Business Information Systems matches as little as \$10 total per lifetime donation from each employee and as much as \$100,000 per lifetime donation.
- 6. In the **Notes** box, enter “Employees must be full-time before Business Information Systems matches gifts.”



- 7. On the toolbar, click **Save and Close**.



► **Add a primary bank relationship record from the Org 1 tab**

From the Org 1 tab, you can track an organization's primary bank or financial institution relationship. The primary bank relationship is usually the financial account from which a constituent contributes gifts to your organization. Only one primary bank relationship can exist on an organization constituent record. You can track other bank and financial institution relationships on the Relationships tab. For more information, see "Bank/Financial Relationships" on page 133.

**Scenario:** To pay its matching gift pledges, Davenport Creamery transfers funds electronically to your organization from Lexington State Bank twice per year. Enter Davenport Creamery's primary banking information from the **Bank** button of the Org 1 tab.

1. From Davenport Creamery's constituent record, select the Org 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

**Davenport Creamery**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media Actions Honor/Memorial Volunteer Prospect Membership Events

Org 1 Org 2 Addresses Relationships Appeals Notes Gifts Attributes

Org Name: Davenport Creamery Aliases

ID: 105

Preferred Address: Business

Country: United States More...

Address lines: 849 Milky Drive

City: Davenport

State: VA Virginia

ZIP: 24239 DPC:

Phones/Email/Links

DNC	Type	Number/Email Address	Shared?
	Business	802-555-1214	Not Shared

Solicit code: Do not phone on weekends

Matching Gift Company: Corporation\Business

Organization matches gifts

Matching Gift Information

Factor: 1.5 Fiscal year starts: 01/01

	Minimum	Maximum
Per gift	\$10.00	\$1,000.00
Annual per donor	\$10.00	\$5,000.00
Total per donor	\$10.00	\$20,000.00

Notes:

No part-time matching

This constituent

Is inactive  Is a solicitor Details

Gives anonymously  Has no valid addresses

Requests no email

Bank

- Click **Bank**. The New Bank/Financial Institution screen appears.

**New Bank/Financial Institution for Davenport Creamery**

File Edit View Bank Help

Save and Close Close Previous Next Print Help Refresh

General Account Attributes/Notes

Transit/Routing no.: 00066666

Financial Institution: Lexington State Bank

Branch name: Dakhaven Branch

Bank notes: Accepts EFT transactions

Electronic Transfer Information

Immediate origin:

Use Transit/Routing number

Other

Account Information

Account number: 4213 0589 0344

Account type: Checking

Bank/Branch Address

Country:

Address lines: 4242 Bluegrass Way

City: Lexington

State: KY Kentucky

ZIP: 40596

Region:

Phones/Email/Links		
DNC	Type	Number/Email Address
	Bank	606-555-8888

Primary bank information  This account is inactive

- Select the General tab.

**Note:** Bank information is stored in *Configuration* under **Financial Institutions**. If the bank you want to add to a constituent's record is not in the system, add the information through *Configuration*.

- In the **Financial Institution** field, click the binoculars and search for "Lexington State Bank". Once you locate and select this bank, information about the bank automatically appears in the **Transit/Routing no.** field, **Branch name** field, **Bank/Branch Address** frame, **Phones/Email/Links** grid, **Bank notes** box, and **Electronic Transfer Information** frame. This information defaults from the bank record set up in *Configuration*.
- Make sure **Primary bank information** is marked. This designates that Lexington State Bank is Davenport Creamery's main bank.

**Note:** If an account is no longer active, you can mark **This account is inactive** rather than delete the record. You may need to keep the information for historic purposes.

- In the **Account Information** frame, in the **Account number** field, enter "4213 0589 0344".
- In the **Account type** field, select "Checking". This is the type of account Davenport Creamery has at Lexington State Bank.
- Select the Account Attributes/Notes tab. Enter any attributes or notes to record about this account or bank, such as that EFT is available.
- On the toolbar, click **Save and Close**. You return to the Org 1 tab of Davenport Creamery's constituent record.
- Click **Save and Close**.

► **Add miscellaneous company information on the Org 2 tab**

The Org 2 tab tracks additional or miscellaneous constituent data. In *The Raiser's Edge*, this diverse information includes income level, industry, number of employees, number of subsidiary companies, and parent corporation.

**Scenario:** United Broadcasting Company requests to sponsor your upcoming spring event. On their information card, they include miscellaneous information, such as type of industry, income level, number of employees, and their parent corporation. Enter this information on the Org 2 tab of their constituent record.

**Note:** Credit Cards and Constituent Codes are discussed in later procedures.

1. From United Broadcast Company's constituent record, select the Org 2 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

The screenshot shows the 'United Broadcasting Company' constituent record form. The 'Org 2' tab is selected. The form contains the following fields and values:

- Parent corp: International Media, Inc.
- Target: \$20,000 - \$29,999
- No. employees: 432
- Income: \$5,000,000 +
- No. subsidiaries: 4
- Receipt type: One receipt per gift
- Industry: Communication

Below the main form are two tables:

Card Type	Cardholder Name	Credit Card No.	Expiration	Reference

Constituent Codes			
Description	Code	Date From	Date To
Corporation Business	CO		

2. In the **Parent corp** (corporation) field, enter "International Media, Inc.", the company who owns and controls United Broadcasting Company. If International Media is in your database, click the binoculars and search for the organization constituent record. It is always a good idea to search first and check before you enter data.
3. In the **Target** field, select the amount range "\$500,000 - \$999,999". This is the range of money you hope to convince United Broadcasting Company to give to your organization.
4. In the **Income** field, select the amount "\$5,000,000+". This is the amount of income United Broadcasting Company generates per year.
5. In the **Receipt type** field, select "One receipt per gift". This is how you want to receipt United Broadcasting Company each time they donate a gift. They requested you send them one receipt for each gift they give.
6. In the **No. employees** field, enter "6,723".
7. In the **No. subsidiaries** field, enter "412".
8. In the **Industry** field, select "Entertainment".

9. On the toolbar, click **Save and Close**.

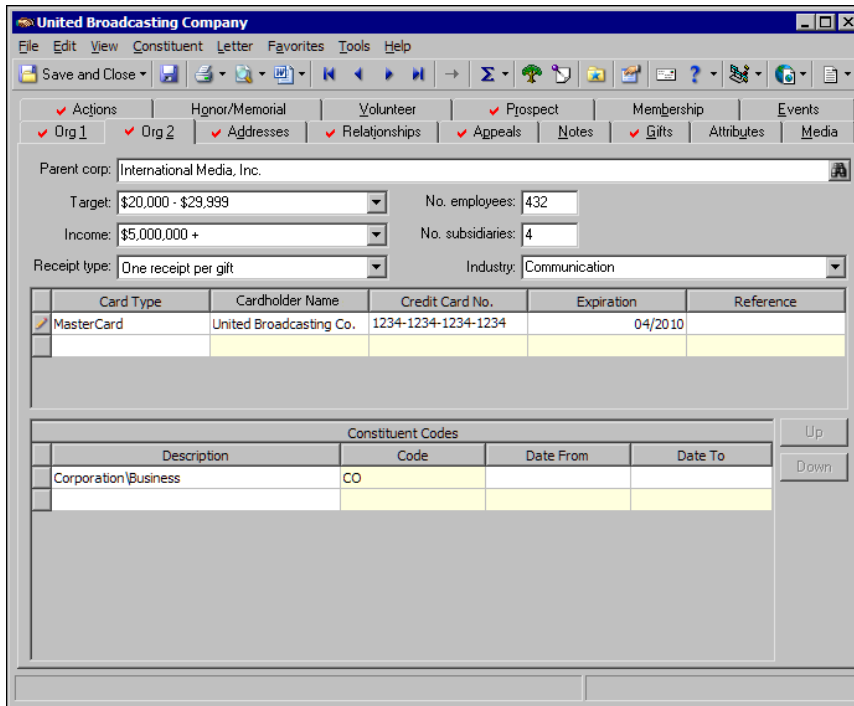
▶ **Add a credit card on the Org 2 tab**

If a constituent frequently uses a credit card to make donations to your organization, you can use the Org 2 tab to track the credit card information. By maintaining current credit card data, you can save time and eliminate possible data entry errors each time the constituent donates.

**Scenario:** United Broadcast Company indicates they want to use a credit card to make regular donations to your organization. On the Org 2 tab, enter their card type, the credit card number, and the expiration date.

**Note:** To delete rows from the Credit Card grid, select the rows to delete, right-click, and select **Delete Rows**. A message appears to ask whether to delete the rows. Click **OK**. To insert a row, select **Insert Row** from the menu. The new row appears above the row you select.

1. From United Broadcast Company’s constituent record, select the Org 2 tab. For more information about how to open a constituent record, see “Access Constituent Records” on page 4.



**Tip:** When you add a new gift record, if you select a pay method of Credit Card, click in the **Card type** field on the gift record and press **F7** on your keyboard to access the Credit Card screen. On this screen, all credit cards you enter on the Org 2 tab appear.

2. In the first row of the **Card Type** column, select “MasterCard”.
3. In the first row of the **Cardholder Name** column, enter the name of the cardholder exactly as it appears on the credit card.
4. In the first row of the **Credit Card No.** column, enter the number 1234-1234-1234-1234.
5. In the first row of the **Expiration** column, enter the date “04/2010”.
6. If you have additional information to track about this credit card, enter it in the **Reference** column.
7. On the toolbar, click **Save and Close**.

**Note:** *The Raiser's Edge* requires Internet access to connect to the Blackbaud *Payment Service*. If *The Raiser's Edge* cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser's Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** column displays a masked credit card number, with only the last four digits visible.

► **Add a constituent code on the Org 2 tab**

**Warning:** Do not use too many constituent codes. Make sure each constituent code conveys useful information. Avoid generic codes such as Donor, Prospect, and Organization. Make sure your constituent codes aptly explain the relationship a constituent has with your organization.

You use constituent codes to define the relationship a constituent has with your organization, such as Friend, Matching Gift Company, and Foundation. In other words, a constituent code tells you why the organization is in your database. We recommend each constituent record in your database have at least one constituent code listed. If you list multiple constituent codes, always list the most important active constituent code first. *The Raiser's Edge* recognizes it as your primary constituent code.

---

**Scenario:** A contact from All Track International tells you they will match gifts given to your organization by their employees. Add the appropriate constituent code information to the Org 2 tab of their constituent record.

**Note:** To delete rows from the **Constituent Codes** grid, select the rows to delete, right-click, and select **Delete Rows**. A message appears to ask whether to delete the rows. Click **OK**. To insert a row, select **Insert Row** from the menu. The new row appears above the row you select.

1. From All Track International's constituent record, select the Org 2 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

Card Type	Cardholder Name	Credit Card No.	Expiration	Reference
Visa		*****4444	05/2014	

Constituent Codes			
Description	Code	Date From	Date To
Matching Gift Company	MG	03/03/2006	

2. In the **Constituent Codes** grid, in the first row of the **Description** column, select "Matching Gift Company"
3. Tab out of the **Description** column. In the **Code** column, "MG" appears automatically. This short description defaults from the Constituent Codes table. You must set up your Constituent Codes table with long descriptions and short descriptions from the **Tables** link of *Configuration*.

**Tip:** In a date field, press **F3** on your keyboard for today's date and **F7** for a calendar.

4. In the first row of the **Date From** column, press **F3** on your keyboard for today's date. If this code is only valid for the constituent for a particular time period, enter a date in the **Date To** field.
5. On the toolbar, click **Save and Close**.

## Edit and Delete Constituent Records

Once you create and save a constituent record, you can edit it to change or add information. For example, you add Martha Drayton as an individual constituent and later realize you added her Social Security Number incorrectly. Open her individual constituent record and change the number in the **SSN** field. Perhaps, National Bank calls to inform you they changed their matching gift criteria. Open their organization constituent record and change information in the **Matching Gift Limits** grid.

You can also delete a constituent record entirely. When you delete a record in *The Raiser's Edge*, the deletion is permanent. Instead of deleting the constituent record, we recommend you mark **This constituent - Is inactive** at the bottom of the record to indicate it is no longer current or valid. This way, the constituent record remains in your database for historic purposes.

To edit or delete a constituent record, proper Security rights must be set up from the **Security** link of *Administration*. For more information about security rights, see the *Configuration & Security Guide*.

### ► Edit a constituent record

Once you create, save, and close a constituent record, you can edit it to change or add information. This procedure shows how to edit an individual constituent record, but you can open an organization record and make changes, also, as long as you have the proper Security rights.

**Scenario:** A solicitor informs you that Christopher Young was born in 1962, not 1961. Open Christopher's constituent record and edit information in the **Birth date** field to reflect his correct date of birth.

1. From Christopher Young's constituent record, select the Bio 1 tab. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.

**Christopher T. Young**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical:**  
 Last name: Young Aliases  
 First name: Christopher  
 Middle name: Todd  
 Titles: Dr.  
 Suffixes:  
 Nickname: Chris  
 Maiden name:  
 ID: 90  
 Gender: Male SSN: 252-69-5595  
 Birth date: 01/29/1961 Age: 44  
 Deceased? Date:  
 Marital status: Married  
 Spouse: Mary Young  
 Solicit code:

**Preferred Address : Home**  
 Country: United States  
 Address lines: 84 Spine Street  
 City: Washington  
 State: DC District of Columbia  
 ZIP: 20010 DPC:

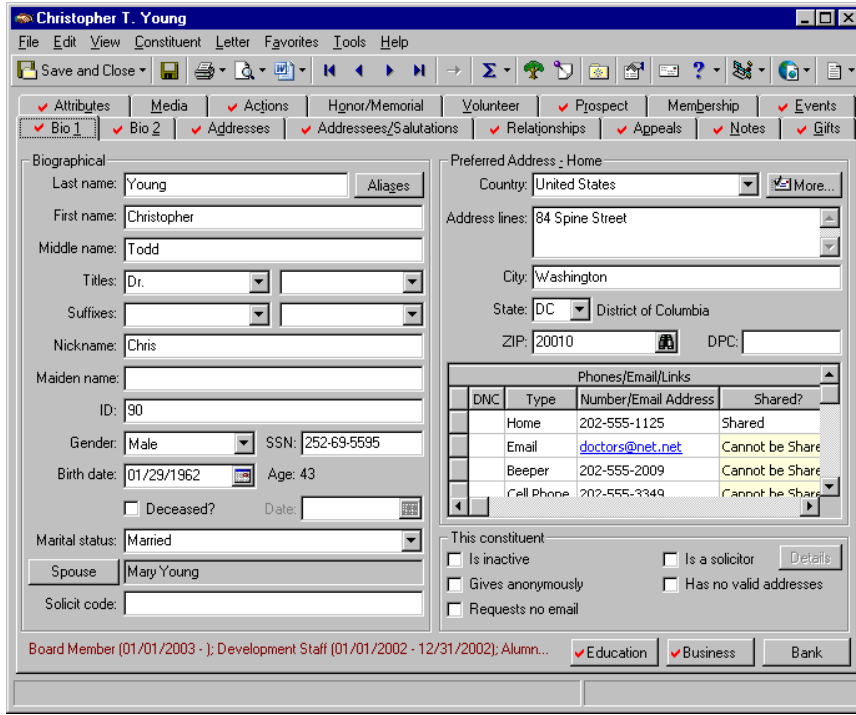
Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	202-555-1125	Shared
	Email	doctors@net.net	Cannot be Share
	Beeper	202-555-2009	Cannot be Share
	Cell Phone	202-555-3349	Cannot be Share

**This constituent**  
 Is inactive  
 Gives anonymously  
 Requests no email  
 Is a solicitor  
 Has no valid addresses  
 Details

Board Member (01/01/2003 - ): Development Staff (01/01/2002 - 12/31/2002); Alumn...  
 Education Business Bank

Press F3 for today's date, F7 for calendar

- In the **Birth date** field, change the date from 01/29/1961 to 01/29/1962. Once you change the date, press **TAB** on your keyboard to move out of the field. The program recalculates Chris's age and displays it in the **Age** field.



- On the toolbar, click **Save and Close**.

**Note:** *The Raiser's Edge* requires Internet access to connect to the Blackbaud *Payment Service*. If *The Raiser's Edge* cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends edited credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser's Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** column displays a masked credit card number, with only the last four digits visible.

When you edit an address and save your changes, if the address is linked to another record, a message appears to inform you that the address is shared. You can select to change the address on all records that share the address, select to change the address on only this record, or click **Cancel**. To help determine whether to change the address, you can click **Show Shared Addresses** to view a list of records that share the address.

► **Delete a constituent record**

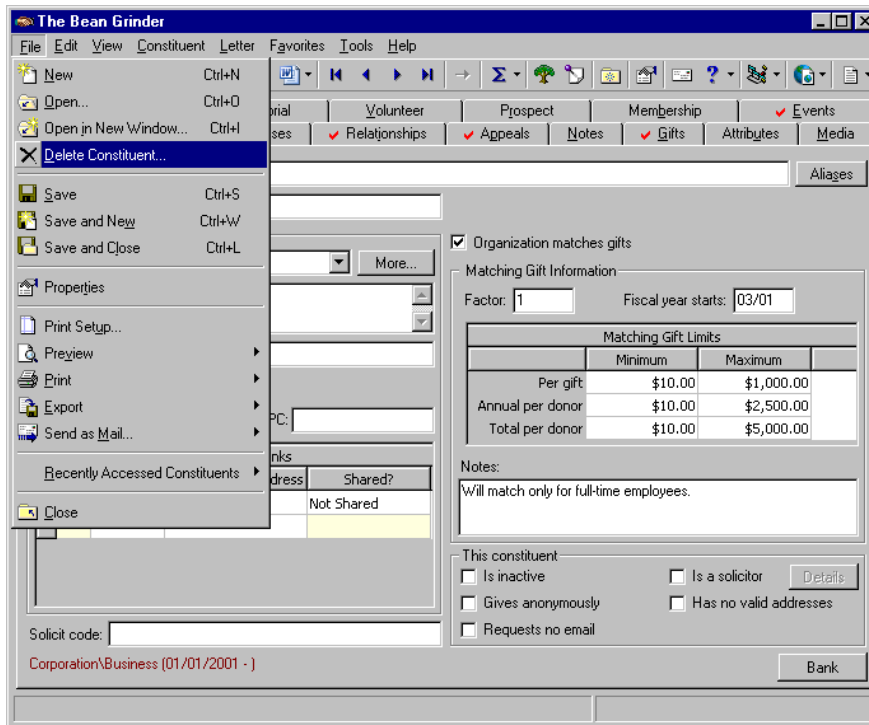
**Warning:** Before you delete a record in *The Raiser's Edge*, you should have a complete backup of your database. Once you delete a record, it is permanently removed from your database. To successfully back up your data, you must first shut down the database.



This procedure shows how to delete an organization constituent record from your database. You can delete an individual constituent record the exact same way. Instead of deleting a constituent record, we recommend you mark **This constituent - Is inactive** to indicate the constituent record is no longer current or valid.

**Scenario:** The Bean Grinder, an organization constituent in your database, goes out of business. Delete this constituent record from your database.

1. From the Bean Grinder's constituent record, select **File, Delete Constituent** from the menu bar. For more information about how to open a constituent record, see "Access Constituent Records" on page 4.



A message appears to ask whether to delete the master constituent record and all its associated records.

2. Click **Yes**. The program permanently removes the constituent record from your database.

# Constituent Mailing Information



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To stay in touch with your constituents, you must maintain current and accurate mailing information. In *The Raiser's Edge*, this includes address, telephone, email, and addressee/salutation information.

## Managing Mailing Information

To stay in touch with your constituents, you must maintain current and accurate mailing information. In *The Raiser's Edge*, this includes address, telephone, email, and addressee/salutation information. Because mailings play such an important role in most fundraising efforts, it is beneficial for you to take time to collect and maintain this type of data. Your constituents will respond to your efficiency and thoroughness, and you will save time and money due to fewer pieces of returned or lost mail.

### Addresses

*The Raiser's Edge* gives you an advantage when it comes to mailings. You can track multiple addresses for each constituent. You can indicate current and past addresses and identify what time of year a constituent resides at an address. You can designate which addresses should receive mail and which are for informational purposes only. For example, Mark Adamson has three addresses — home, vacation home, and business. He wants to receive mail at only his home and business addresses, depending on the types of mailing. You track his vacation home address simply for informational purposes.

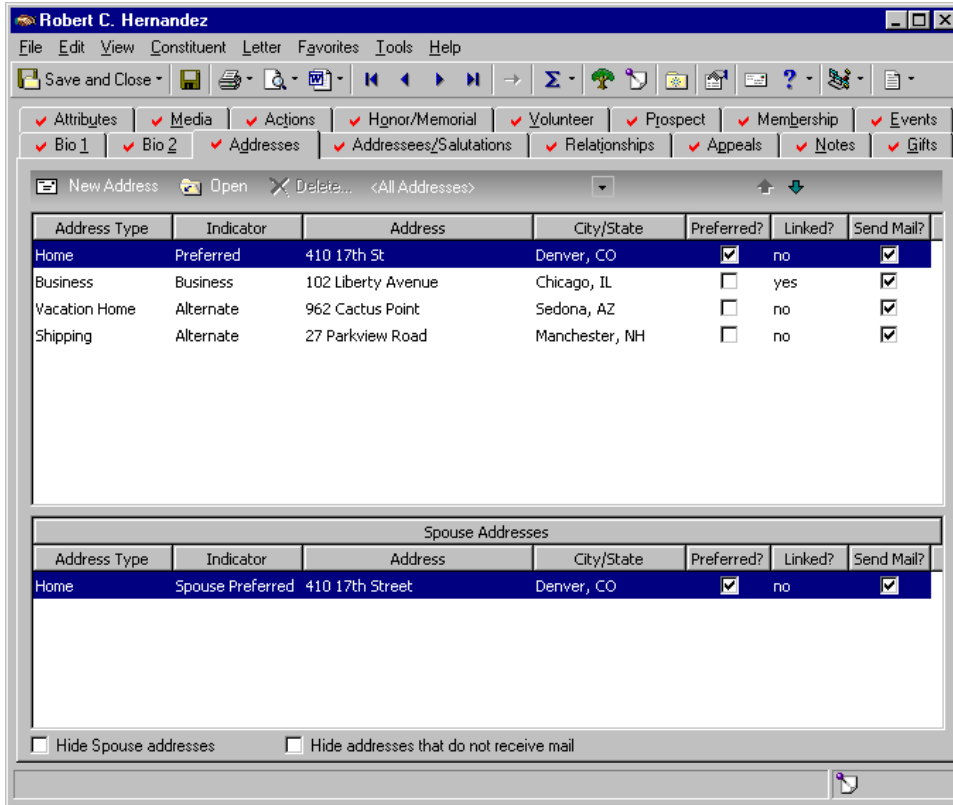
**Note:** For an individual constituent record, you can add the primary business address from the **Business** button on the Bio 1 tab. For more information, see “Add a primary organization (business) relationship record from the Bio 1 tab” on page 49.

The Addresses tab allows you to add and maintain multiple addresses, email addresses, and phone numbers for each constituent record. For an individual constituent record, you can track the addresses of the spouse or domestic partner, as well. Each record has one preferred address, which you routinely add on the Bio 1 or Org 1 tab of the constituent record. The primary address appears on the Addresses tab, as well as on the Bio 1 or Org 1 tabs. All others are easily tracked on the Addresses tab. You can add an address from the Bio 1 or Org 1 tab, or from the Addresses tab. When you add an address from either the Bio 1 or the Org 1 tab, it automatically becomes the preferred address for that constituent. When you add an address from the Addresses tab, you can designate the address as preferred or leave it as an alternate, or secondary address. There can be only one preferred address for the constituent.

From an individual or organization constituent record, at any time, you can easily copy the preferred address to an alternate address. This is helpful, for example, if you have a constituent who moves to a new address. You need to update the preferred home or business address, but want to keep the old address for historic purposes.

**Note:** You can add other columns to the Constituent Addresses grid. Right-click on the Constituent Addresses grid, and select **Columns** from the menu that appears. You can then select the columns you want to see. For more information about column functionality, see the *Program Basics Guide*.

On the Addresses tab, two Addresses grids appear — one for the constituent’s addresses and one for the spouse or domestic partner’s addresses. With a checkbox, you control whether you want to see just the constituent addresses or both the constituent and the spouse addresses. The Addresses grids contain the **Address Type**, **Indicator**, **Address**, **City/State**, **Preferred**, **Linked**, and **Send Mail** columns.



It is important you do not confuse an address type with an indicator. The **Address Type** is determined by making a selection from the **Address Type** field on the Address screen that appears when you add or open an address. Some examples of address types can be Home, Vacation Home, Former Address, Rental Property, School Residence, or Time Share.

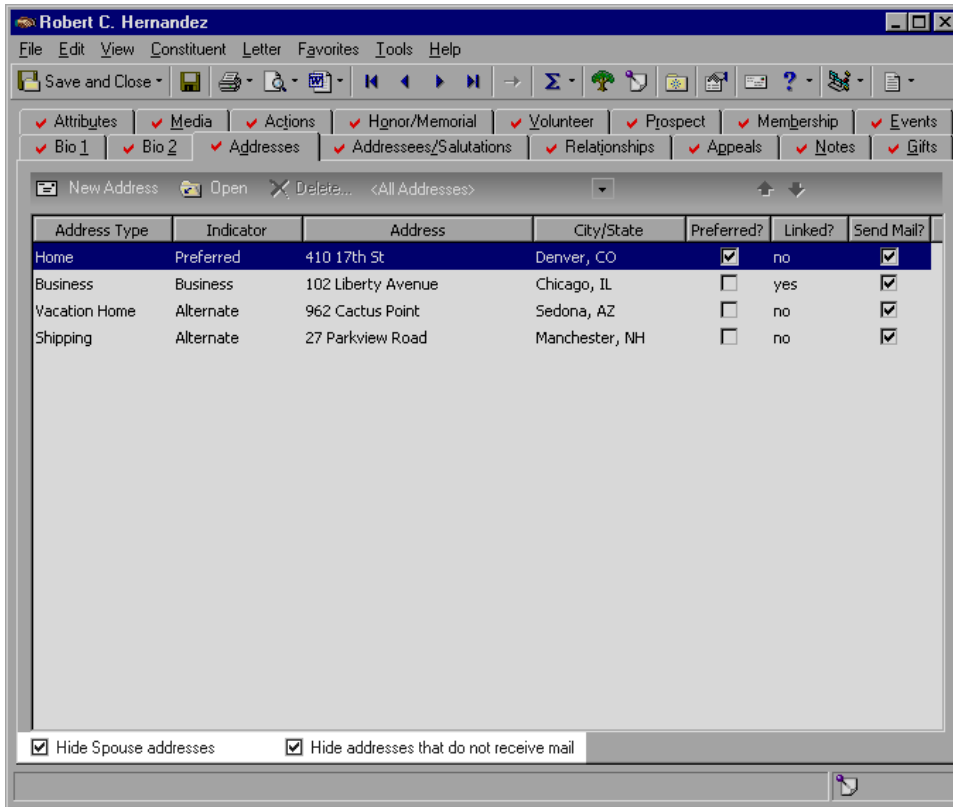
The **Indicator** is determined by a checkbox on the Address screen, and lets the user know where or to whom the address belongs. For example, an address with an **Indicator** of Preferred has the **Set this address to the preferred address** checkbox marked on the Address screen and appears on the Bio 1 or Org 1 tab. An address with an **Indicator** of Business is on the Address screen of an organization relationship record and has the **Primary business information** checkbox marked. Addresses that belong to a constituent's spouse or domestic partner have an **Indicator** of Spouse Preferred, Spouse Business, or Spouse Alternate. All other addresses on a constituent record have an **Indicator** of Alternate.

DNC	Type	Number/Email Address	Shared
	Home	303-555-3301	Shared
	Beeper	303-555-2000	Cannot b
	Email	rhernandez@net.com	Cannot b

On the bottom of the Addresses tab of an individual constituent record, the **Hide Spouse addresses** checkbox is present so you can decide if you want to show spouse or domestic partner addresses for all individual records. For example, if you mark the **Hide Spouse addresses** checkbox on the Addresses tab of Robert Hernandez's constituent record, this checkbox is marked on the Addresses tab of all your individual records. By doing so, no spouse or domestic partner addresses appear on the Addresses tabs, period. When you unmark the **Hide Spouse addresses** checkbox, all spouse addresses on all Addresses tabs appear in a separate Addresses grid underneath the Constituent Addresses grid.

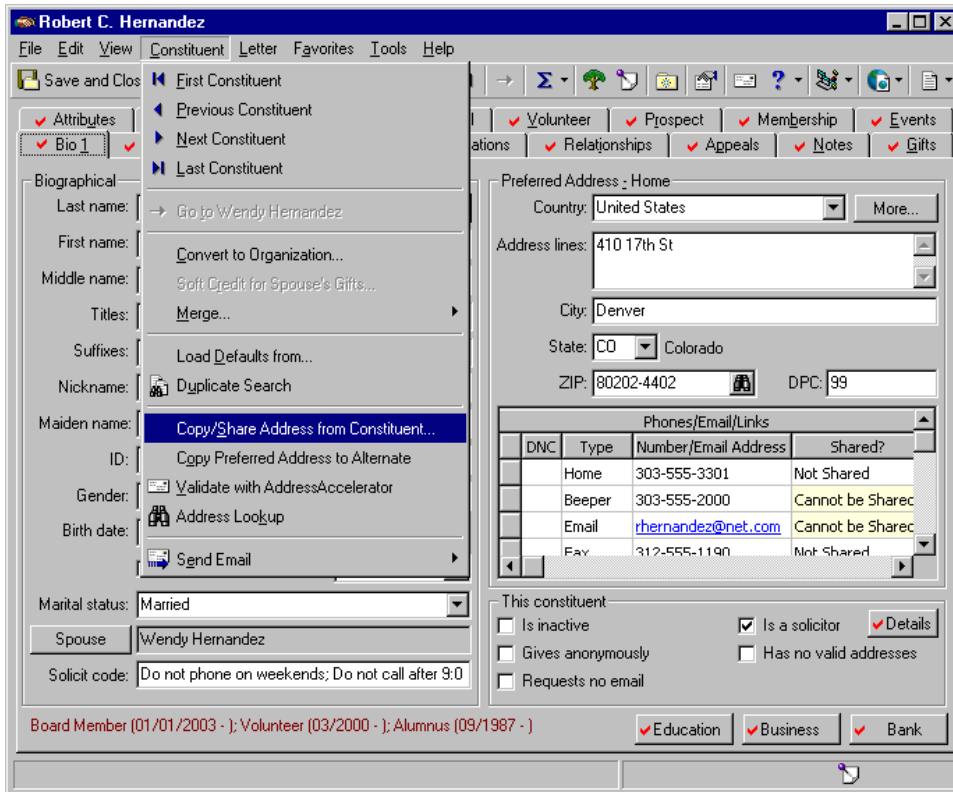
On the bottom of the Addresses tab of an individual or organization constituent record, the **Hide addresses that do not receive mail** checkbox is present, so you can decide if you want to hide all nonmailing addresses. This includes constituent and spouse addresses that have the **Send mail to this address** checkbox unmarked on the Address tab of the Address screen, or addresses that have a date in the **Date to** field in the **Valid Dates** frame of the Address screen that is less than the current date, or a date in the **Date from** field that is greater than the current date. When you mark the **Hide addresses that do not receive mail** checkbox, all spouse alternate

addresses disappear because *The Raiser's Edge* address processing will not send mail to that address. The **Hide addresses that do not receive mail** checkbox affects all your constituent records. For example, if you mark the **Hide addresses that do not receive mail** checkbox on the Addresses tab of Robert Hernandez's constituent record, this checkbox is marked on the Addresses tab of all your constituent records, both individual and organization. By doing so, only addresses that receive mail appear on the Addresses tabs, period.



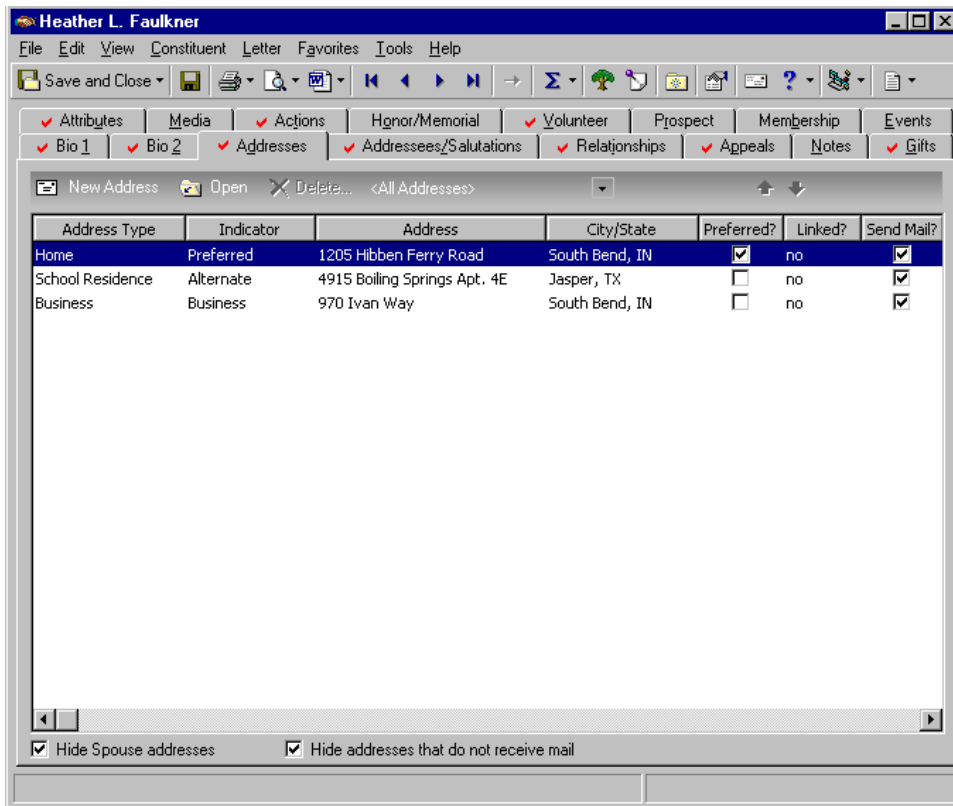
To help eliminate data entry errors, you can copy or copy and link an address from one constituent record to another. When you copy an address, you are simply pasting in a separate copy of the address directly from the original record. Changes to the address on the original record are not made to the copy, and vice versa. When you copy and link (share) an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record can be made automatically to the other record. When you change a linked (shared) address, a message appears letting you know the address is shared and gives you the option to change the address on only the record in which you are working, or on all shared records.

You can copy or copy and link an address by selecting **Constituent, Copy/Share Address from Constituent** from the menu bar of the constituent record. Or, you can select **Address, Copy/Share Address from Constituent** from the menu bar of the Address screen that appears when you add or edit an address. Once you link (share) an address, the menu option in both places changes to **Address Sharing Options**, so you have the ability to break the link.



Because mailings play such a large role in most fundraising efforts, it is crucial you keep accurate and current address information on your constituents. The information you maintain on the Addresses tab is used to generate labels, thank-you letters, receipts, phonathon forms, as well as other pieces of data, such as reports and queries. By using *The Raiser's Edge* to its fullest potential, you eliminate a tremendous amount of work for yourself. For example, once you enter address information into *The Raiser's Edge*, you do not have to remember your constituents' preferences for certain types of mail or the date they move to a vacation home.

For example, Heather Faulkner has a home, school, and business address where she likes to receive mail under varying circumstances. She prefers to receive all mailings at her school address, except for newsletters and thank-you letters. She prefers those be sent to her home address when she is in residence and to her business address the remainder of the year. By using the Addresses tab, you can make note of Heather’s preferences for mail types and indicate which months she will be at each of her two residences. Once that information is on her record, you can generate mailings from *Mail*, and **The Raiser’s Edge** will pull the correct address based on what you define on Heather’s constituent record. Doing this shows your constituents that you respect their requests by taking the time to make sure the correct mailings get to the correct addresses.



For more information about generating mailings, see the *Mail Guide*.



► **Adding a constituent address from the Addresses tab**

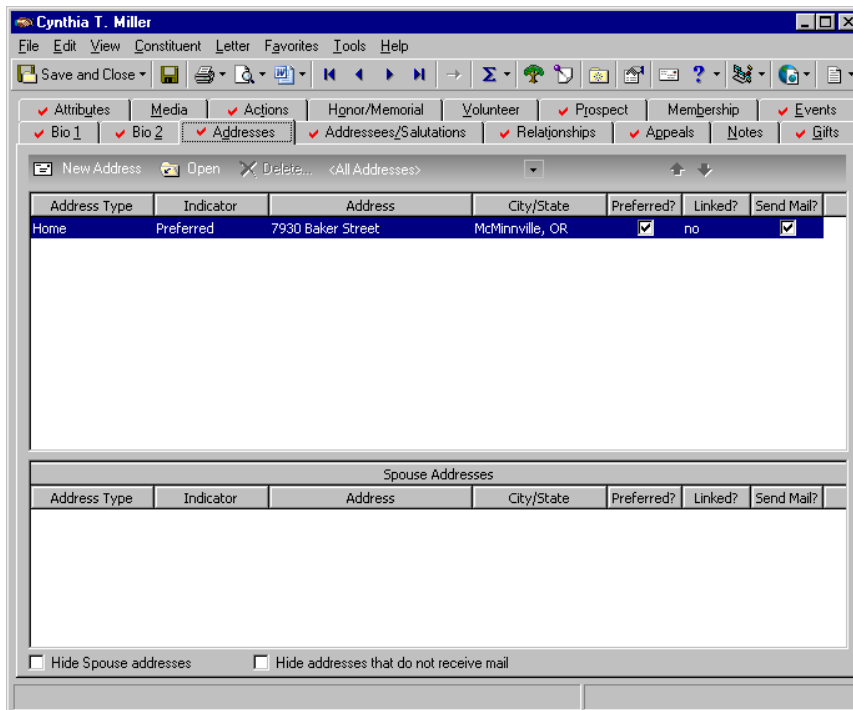
From the Addresses tab, you can add multiple addresses for each constituent. When you add a new address, you can enter a variety of mailing information, including street name and number, city, state, ZIP, address type, information source, county, region, post office carrier route number, valid dates, and seasonal dates. You also indicate whether the address is the preferred address and whether mail should be sent to the address. Once you add an address to the Addresses tab, you can select the address and click **Open** on the action bar to open it for viewing or editing.

You can also click **Delete** to permanently remove the address from your database. Instead of deleting an address, we recommend you use the **Valid Dates** frame on the Address screen to notate whether the address is current. That way, the address remains in your database for historic purposes. A few rules exist for deleting an address from the grid of the Addresses tab of a constituent record. From the Addresses tab, you cannot delete an address from the grid if it has an **Indicator** of Preferred or Business, Spouse Preferred, Spouse Business, or Spouse Alternate. To delete these particular addresses, you must select the Bio 1 or Org 1, or Relationships tab, and delete the appropriate address there.

**Scenario:** Cynthia Miller notates on her membership form that she has a vacation home. She resides there during the summer months and requests her mail be sent to this address during that time. From the Addresses tab, enter the mailing address, phone number, region, and valid seasonal dates.

**Note:** The buttons and filters on the action bar of the Addresses tab pertain only to the Constituent Addresses grid. The **Spouse Addresses** grid is for informational purposes only.

1. From Cynthia Miller's constituent record, select the Addresses tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



**Tip:** You can use **Globally Add Records** to send an email message to selected or all constituent records in your database. The program uses the email address you add for the constituent's preferred address. For more information, see the *Global Add, Delete, & Change Guide*.

- On the action bar, click **New Address**. The New Address screen appears.

The screenshot shows a software window titled "New Address for Cynthia T. Miller". The window has a menu bar (File, Edit, View, Address, Help) and a toolbar with icons for Save and Close, and navigation arrows. The main area is divided into several sections:

- Address Information:** Country: United States; Address type: Home; Info source: Membership Form; County: Charleston; Region: Southeast; CART: CO13; LOT: D0000.
- Address Lines:** Address lines: 2598 Seaside Lane; City: Sullivan's Island; State: SC (South Carolina); ZIP: 29482; DPC: 57.
- Phones/Email/Links:** A table with columns: DNC, Type, Number/Email Address, Share. One row is filled with: DNC (checkbox with red X), Type (Vacation...), Number/Email Address (843-555-2555), Share (Not Shar).
- Valid Dates:** Date from: [empty]; Date to: [empty]; Seasonal Address (checked); Seasonal from: 06/01; Seasonal to: 08/31.
- Address block:** 2598 Seaside Lane, Sullivan's Island, SC 29482.

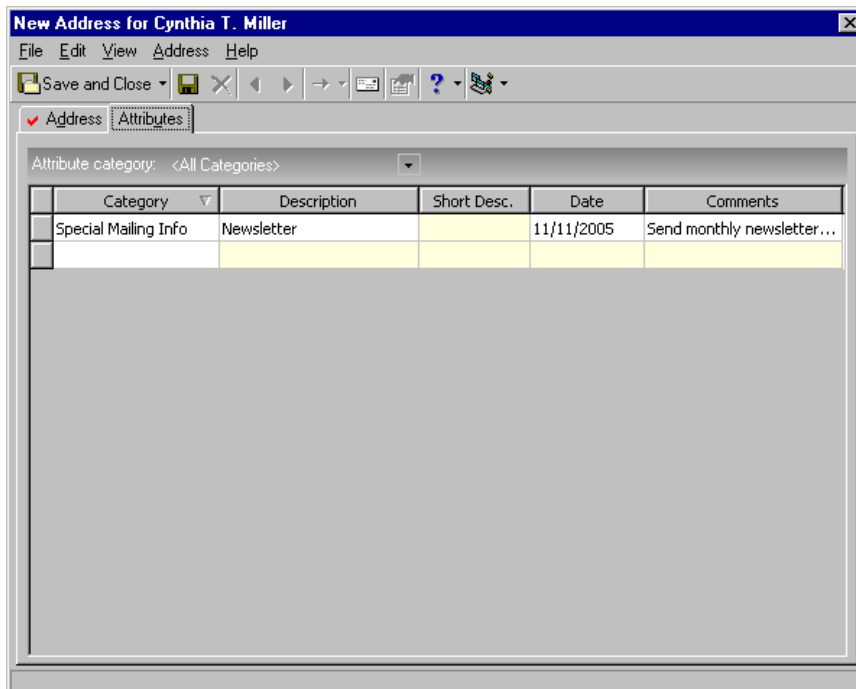
- In the **Country** field, select "United States". The country you select determines the fields that appear on the Address screen. For example, if you select "Canada" instead of "United States", **State** and **ZIP** change to **Province** and **Postal Code**.
- In the **Address lines** field, enter "2598 Seaside Lane".
- In the **City** field, enter "Sullivan's Island"; in the **State** field, select "SC"; and in the **ZIP** field, enter "29482".
- In the **DPC** field, enter "57". DPC is the Delivery Point Code. It is used as part of the address barcode.

**Tip:** Once you enter an email address in the **Phones/Email/Links** grid, you can send an email directly from the grid. Click the email address. The Email screen appears, so you can compose and send your message. Once you send the email, an action is recorded on the Actions tab of the constituent record.

- In the **Phones/Email/Links** grid, select "Vacation Home" in the first empty row of the **Type** column, and enter the phone number 843-555-2555 in the same row in the **Number/Email Address** column.
- In the **Shared** column, Not Shared appears by default beside this new phone number. This means that in *Configuration Tables*, in Phone Types, on the Edit Phone Types screen for Vacation Home phone numbers, you left the **Do not share phones of this type** checkbox unmarked. This selection enables this phone type to be shared if you later copy and link this address with another constituent or relationship record. If you do not want Cynthia's Vacation Home phone number to be shared, select "Do Not Share" in this column. In *Configuration Tables*, if you had marked the **Do not share phones of this type** checkbox for this phone type, Cannot be Shared would appear in the **Shared** column beside the phone number and the field would be locked. For more information about copying and sharing addresses and phone sharing, see "Copying and linking an address from one constituent record to another" on page 95, "Copying and Linking Relationship Addresses" on page 146, and "Phone Sharing" on page 157.
- In the row beside the Vacation Home phone number, mark the **DNC** column. Cynthia's vacation home phone number is unlisted. She gave it to you for informational purposes, but she rather not be contacted at this number.

DNC stands for “Do Not Contact.” When you mark this column beside a phone number or email address, a visual warning appears in the column. This warning tells you the constituent does not want to receive phone calls or email messages at the number or email address.

10. In the **Address type** field, select “Vacation Home”.
11. In the **Info Source** field, select “Membership Form”.
12. In the **County** field, select “Charleston”.
13. In the **Region** field, select “Southeast”.
14. In the **CART** field, enter “CO13”. CART is the carrier route. It is used as the endorsement line and can be used to sort mailings for further discounts.
15. In the **LOT** field, enter “D000”. LOT stands for “line of travel” and is used with the CART in the endorsement line.
16. Make sure the **Send mail to this address** checkbox is marked. Cynthia requests you send mail to this address during the months she is in residence.
17. Make sure the **Set this address to the preferred address** checkbox is not marked. This is Cynthia’s vacation home. Her home address is still her preferred address and appears in the grid with an **Indicator** of “Preferred”. The vacation home will appear in the grid with an **Indicator** of “Alternate”.
18. If this address is only valid for a specific period of time, in the **Valid Dates** frame, enter dates in the **Date from** and a **Date to** fields.
19. Mark the **Seasonal Address** checkbox. This enables the **Seasonal from** and **Seasonal to** fields. This vacation home is not Cynthia’s year-round home. She stays there only during the summer. In the **Seasonal from** field, enter the date 06/01. In the **Seasonal to** field, enter the date 08/31.
20. Select the **Attributes** tab. The **Attributes** tab holds any additional information you need to track about this particular address. For example, any special mailing instructions can go here.



21. On the toolbar, click **Save and Close**. You return to the **Addresses** tab of Cynthia’s constituent record. The Vacation Home address appears in the **Constituent Addresses** grid.

22. Click **Save and Close**.

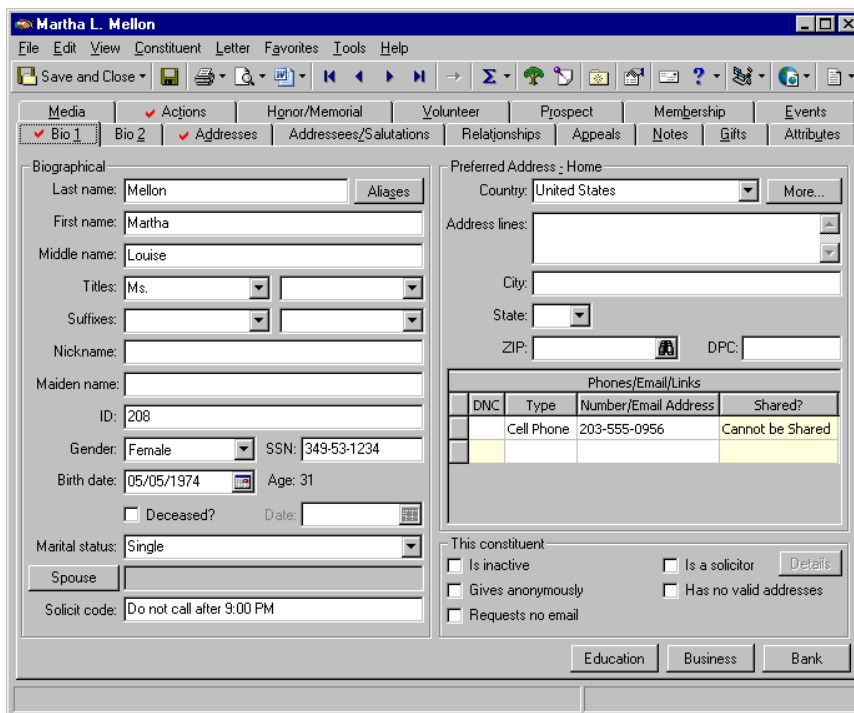
▶ **Copying and linking an address from one constituent record to another**

To help eliminate data entry errors, you can copy or copy and link an address from one constituent record to another or to a relationship record. When you copy an address, you are merely pasting in a separate copy of the address directly from the original record. Changes to the address on the original record are not made to the copy, and vice versa.

When you copy and link (share) an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record can be made automatically to the other record. When you change a linked address, a message appears letting you know the address is shared and gives you the option to change the address on only the record in which you are working, or on all shared records. This procedure shows you how to copy and link an address. For detailed information about copying addresses, linking addresses, breaking a link between addresses, and phone sharing options, see “Copying and Linking Relationship Addresses” on page 146.

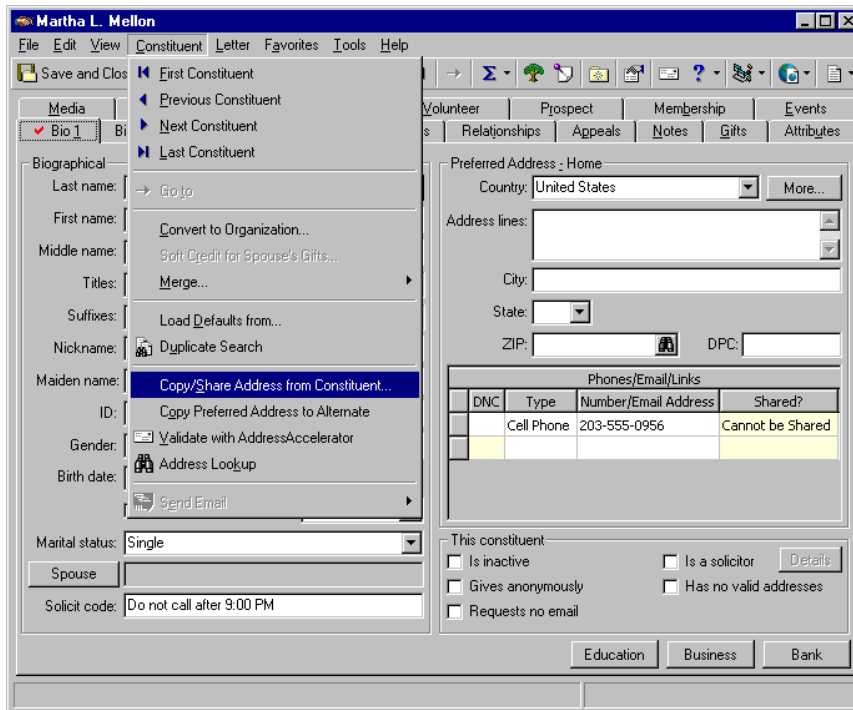
**Scenario:** You recently added Martha Mellon as a constituent in your database, but you did not have an address for her. You found out today that Martha lives with her grandmother, Clara Daniels. To ensure you enter the address correctly on Martha’s constituent record, copy the address from Clara’s constituent record to Martha’s. You want to ensure when you change the address on either record, the change is automatically updated on both, so also link (share) the two addresses.

1. From Martha Mellon’s constituent record, select the Bio 1 tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



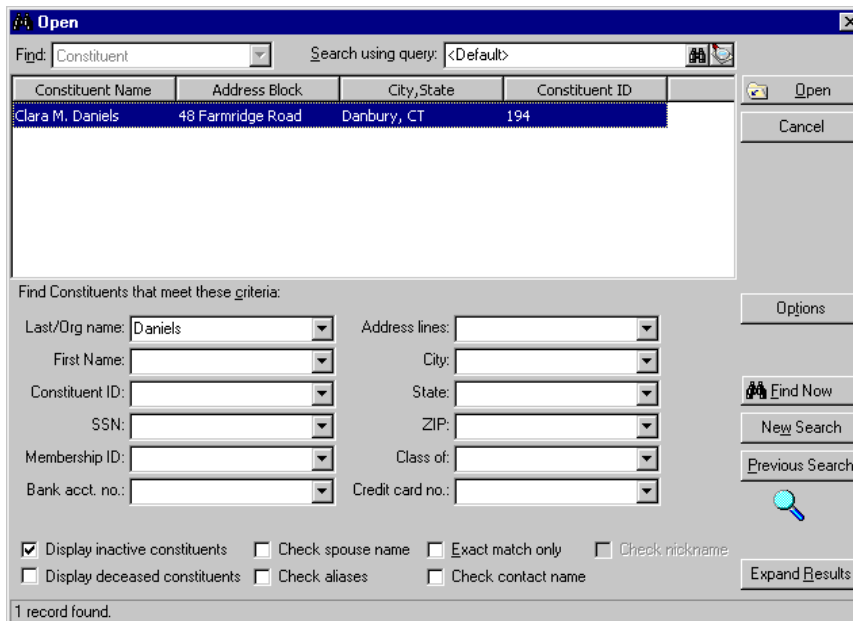
**Note:** You can also click the **More** button and select **Address, Copy/Share Address from Constituent** from the menu bar of the Address screen. On the Address screen, you can also enter additional address information for the constituent.

- From the menu bar, select **Constituent, Copy/Share Address from Constituent**.

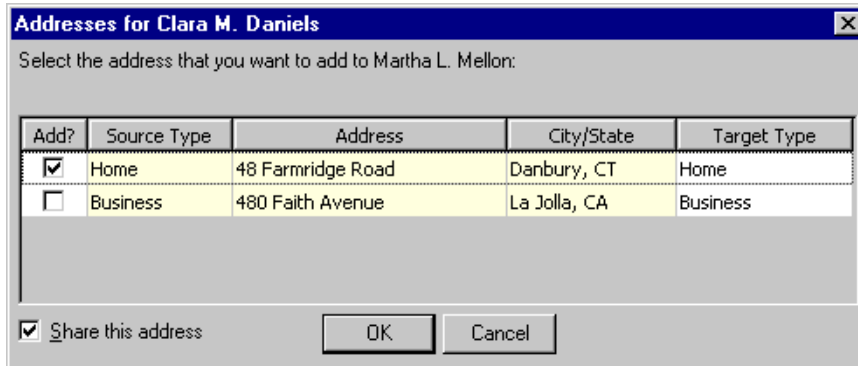


The Open screen appears, so you can search for the constituent record from which you want to copy the address.

- In the **Last/Org name** field, enter "Daniels".
- Click **Find Now**. Clara Daniels appears in the grid.



5. Select Clara’s record in the grid and click **Open**. The Addresses for screen appears.



6. To copy Clara’s home address to Martha’s constituent record, mark the checkbox in the **Add** column beside the correct address.

**Note:** To stop sharing addresses, select **Constituent, Address Sharing Options** from the menu bar of the constituent record. Or, select **Address, Address Sharing Options** from the menu bar of the Address screen, accessed from the **More** button. The Address Links screen appears. Click **Stop Sharing This Address**.

7. To link Clara’s home address to Martha’s constituent record address, make sure the **Share this address** checkbox on the bottom left of the screen is marked, also.
8. Click **OK**. You return to the Bio 1 tab of Martha’s constituent record. Clara’s address, which is now also Martha’s primary address, appears in the Address fields on this tab. Clara’s phone numbers appear also, and are shared. A link icon appears on the **More** button to let you know the address is linked.

Only phone types that are shareable appear in the **Phones/Email/Links** grid. From **Tables**, in *Configuration*, you must set up which phone types can be shared. From the Phone Types table list, you must open each phone type and determine if that particular phone type should be shared. On each Edit Phone Types screen, to allow a phone type to be shared, leave the **Do not share phones of this type** checkbox unmarked. When you mark this checkbox, that particular phone type cannot be shared. For more information about sharing phone and email addresses, see “Phone Sharing” on page 157. For more information about tables in Configuration, see the *Configuration & Security Guide*.

Martha L. Mellon

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media Actions Honor/Memorial Volunteer Prospect Membership Events

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts Attributes

Biographical

Last name: Mellon Aliases

First name: Martha

Middle name: Louise

Titles: Ms.

Suffixes:

Nickname:

Maiden name:

ID: 208

Gender: Female SSN: 349-53-1234

Birth date: 05/05/1974 Age: 31

Deceased? Date:

Marital status: Single

Spouse:

Solicit code: Do not call after 9:00 PM

Preferred Address: Home

Country: United States More...

Address lines: 48 Fairridge Road

City: Danbury

State: CT Connecticut

ZIP: 06810 DPC:

DNC	Type	Number/Email Address	Shared?
	Home	203-555-2523	Shared

This constituent

Is inactive  Is a solicitor Details

Gives anonymously  Has no valid addresses

Requests no email

Education Business Bank

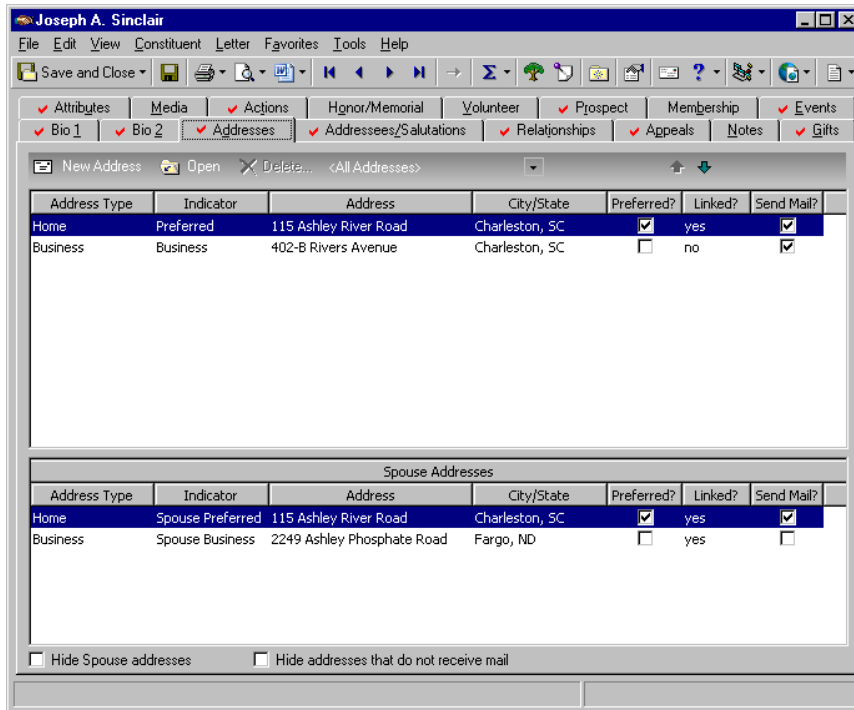
**Warning:** Any existing phone numbers in the **Phones/Email/Links** grid on Martha’s constituent record are lost when you copy Clara’s address to Martha’s record. You may want to write down any existing numbers and add them back to Martha’s record after the process.

9. On the toolbar, click **Save and Close**.

▶ **Hiding all spouse addresses from the Addresses tab**

On the bottom left of the Addresses tab, the **Hide Spouse addresses** checkbox is present so you can decide if you want to show spouse or domestic partner addresses for all your individual records. For example, if you mark the **Hide Spouse addresses** checkbox on the Addresses tab of Joseph Sinclair’s constituent record, this checkbox is marked on the Addresses tab of all individual records in your database. By doing so, no spouse or domestic partner addresses appear on the Addresses tab of your individual constituent records. When you unmark the **Hide Spouse addresses** checkbox, all spouse addresses on all Addresses tabs appear in a separate **Spouse Addresses** grid underneath the Constituent Addresses grid.

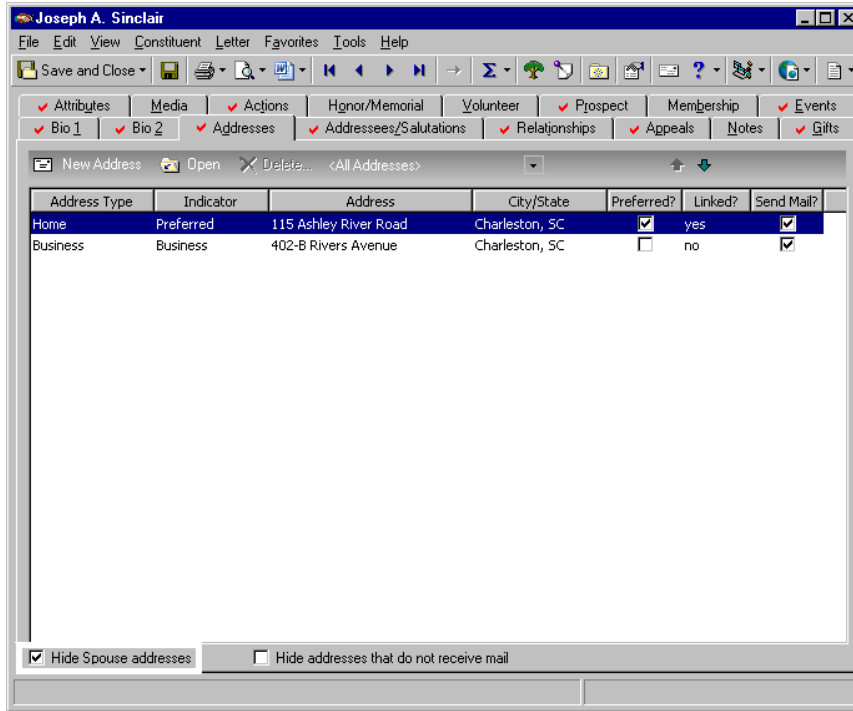
1. From an individual constituent record, select the Addresses tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** When you want spouse or domestic partner information to reappear on the Addresses tab of all your individual constituent records, unmark the **Hide Spouse addresses** checkbox on any individual constituent record.



2. Mark the **Hide Spouse addresses** checkbox. By doing so, no spouse or domestic partner addresses appear on the Addresses tab of this constituent record. Also, the **Hide Spouse addresses** checkbox is marked automatically on the Addresses tab of all your individual constituent records. Therefore, no spouse or domestic partner addresses appear.



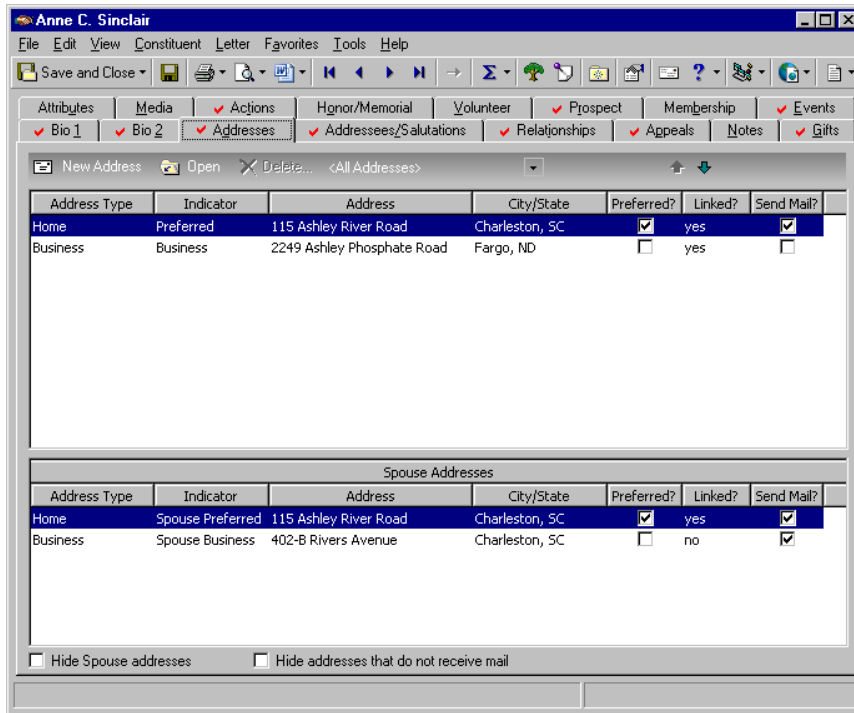
3. On the toolbar, click **Save and Close**.

▶ **Hiding all addresses that do not receive mail from the Addresses tab**

On the bottom of the Addresses tab of an individual or organization constituent record, the **Hide addresses that do not receive mail** checkbox is present, so you can decide if you want to hide all nonmailing addresses. This includes constituent and spouse addresses that have the **Send mail to this address checkbox** unmarked on the Address tab of the Address screen, or addresses that have a date in the **Date to** field in the **Valid Dates** frame of the Address screen that is less than the current date, or a date in the **Date from** field that is greater than the current date. When you mark the **Hide addresses that do not receive mail** checkbox, all spouse alternate addresses disappear because *The Raiser's Edge* address processing will not send mail to that

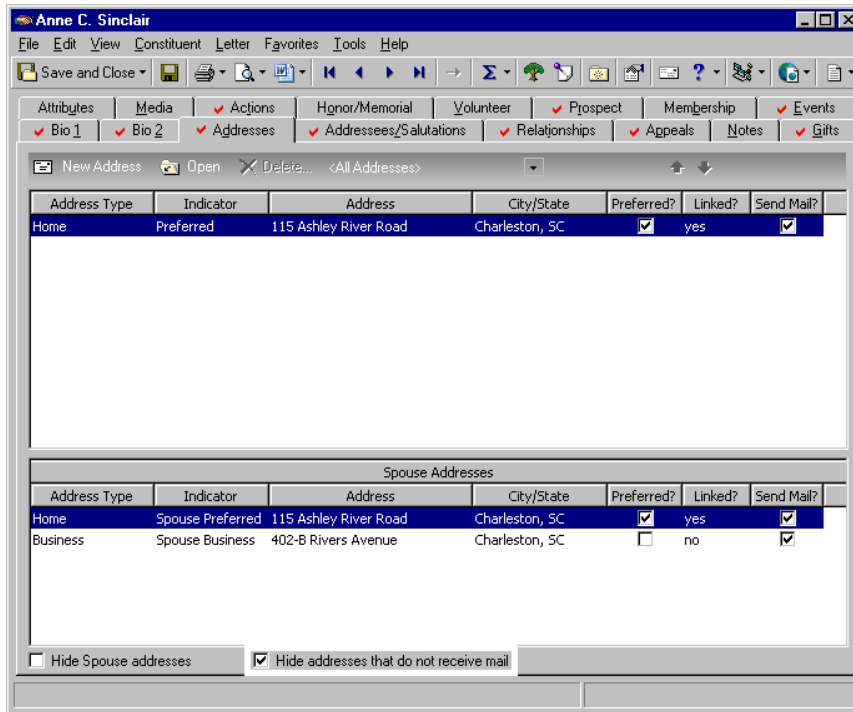
address. The **Hide addresses that do not receive mail** checkbox affects all constituent records. For example, if you mark the **Hide addresses that do not receive mail** checkbox on the Addresses tab of Robert Hernandez’s constituent record, this checkbox is marked on the Addresses tab of all your constituent records, both individual and organization. By doing so, only addresses that receive mail appear on the Addresses tabs, period.

1. From a constituent record, select the Addresses tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** When you want nonmailing addresses to reappear on the Addresses tab of all your constituent records, unmark the **Hide addresses that do not receive mail** checkbox on any individual or organization constituent record.

- On the bottom of the tab, mark the **Hide addresses that do not receive mail** checkbox. The **Hide addresses that do not receive mail** checkbox is automatically marked on the Addresses tab of all individual and organization constituent records. Therefore, no nonmailing addresses appear.



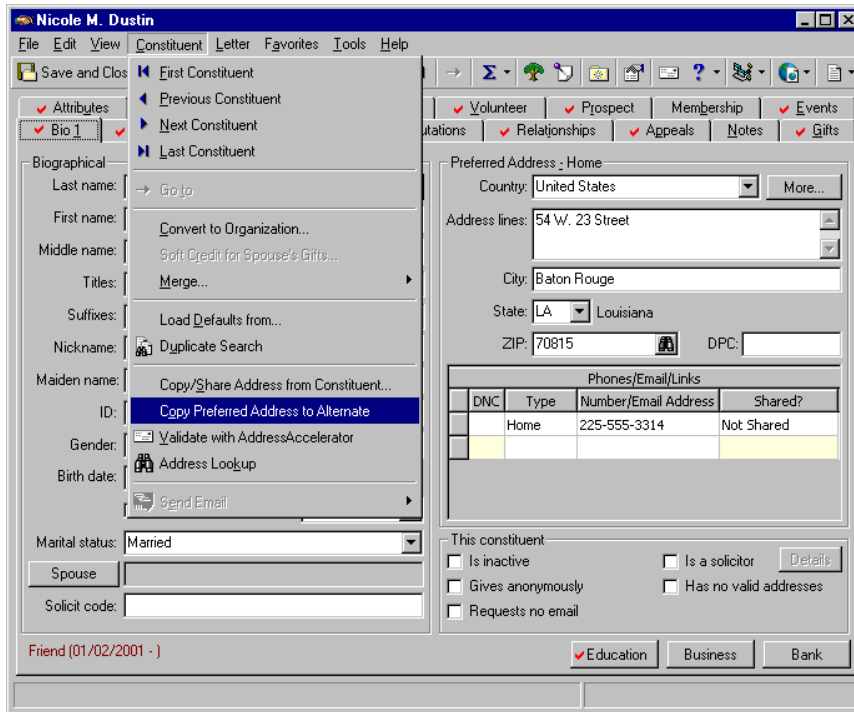
- On the toolbar, click **Save and Close**.

► **Copying the Preferred address to an Alternate address**

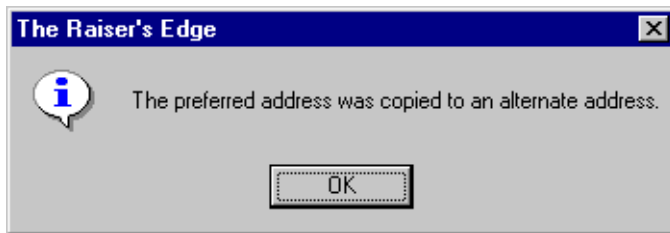
From an individual or organization constituent record, you can copy the preferred address to an alternate address. This is helpful, for example, if you have a constituent who moves to a new address. You need to update the preferred home or business address, but want to keep the old address for historic purposes.

**Note:** On the Bio 1 or Org 1 tab, you can click **More** to enter more extensive address information. On the Address screen that appears, you can also select **Constituent, Copy Preferred Address to Alternate** from the menu bar.

1. From an individual or organization constituent record, select **Constituent, Copy Preferred Address to Alternate** from the menu bar. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



A message appears, letting you know the preferred address was copied to an alternate address.



2. Click **OK**. The old address remains in the **Preferred Address** frame on the Bio 1 or Org 1 tab of the constituent record, so you can easily update it.

**Note:** In General **Business Rules**, you must select the type of address to use when **Copying the Preferred Address to an Alternate Address**. When you use the **Copy Preferred Address to Alternate** menu item, the preferred address is copied as an alternate address so you can select or create another address to use as the preferred address. All records linked to the old preferred address (now an alternate) are updated to the new preferred address. This business rule determines the type of address the alternate is saved as. When you select to **Use address type from Preferred address**, the alternate address uses the same address type it had when it was the preferred address. When you select to **Use this default address type**, the alternate address uses the type you specify in the accompanying field. The default entry is “Home”.

3. In the **Preferred Address** frame, enter the new address — **Country, Address lines, City, State, ZIP or DPC**. You can click **More** to add more extensive address information.

**Biographical:**  
 Last name: Dustin  
 First name: Nicole  
 Middle name: Margaret  
 Titles: Ms.  
 Suffixes:  
 Nickname: Nikki  
 Maiden name: Fisco  
 ID: 16  
 Gender: Female SSN: 239-31-5932  
 Birth date: 09/01/1954 Age: 50  
 Deceased?  Date:  
 Marital status: Married  
 Spouse:  
 Solicit code:

**Preferred Address : Home**  
 Country: United States  
 Address lines: 1111 Plantation Lane  
 City: Baton Rouge  
 State: LA Louisiana  
 ZIP: 70815 DPC:

DNC	Type	Number/Email Address	Shared?
	Home	225-555-3314	Not Shared

**This constituent**  
 Is inactive  
 Gives anonymously  
 Requests no email  
 Is a solicitor  
 Has no valid addresses

Friend (01/02/2001 - )

4. Select the **Addresses** tab. Both the new preferred address and the recently made alternate address appear in the **Constituent Addresses** grid, with “Preferred” and “Alternate” appearing in the **Indicator** column, respectively. You can open the alternate address and mark the **Send mail to this address** checkbox, if you want the address to be a mailing address.

Address Type	Indicator	Address	City/State	Preferred?	Linked?	Send Mail?
Home	Preferred	1111 Plantation Lane	Baton Rouge, LA	<input checked="" type="checkbox"/>	no	<input checked="" type="checkbox"/>
Former Address	Alternate	54 W. 23 Street	Baton Rouge, LA	<input type="checkbox"/>	no	<input type="checkbox"/>

Spouse Addresses

Address Type	Indicator	Address	City/State	Preferred?	Linked?	Send Mail?
--------------	-----------	---------	------------	------------	---------	------------

Hide Spouse addresses  Hide addresses that do not receive mail

**Note:** When you make changes to an address and save your changes, if the address is linked to other records, a message appears, letting you know the address is shared. You can select to change the address on all records that share the address, select to change the address on only this record, or click **Cancel**. To help you determine if you want to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

5. To help you remember the alternate address is an old address, select the alternate address and click **Open** on the action bar. The Address screen appears.
6. In the **Address Type** field, select "Former Address".
7. On the toolbar, click **Save and Close**. You return to the constituent record.
8. Click **Save and Close**.

## Addressees/Salutations

**Note:** Through **Globally Change Records**, you can globally add new Addressees/Salutations. To access **Globally Change Records**, click **Admin** on the Raiser's Edge bar, and click the link. For more information about global change functionality, see the Globally Change Records chapter of the *Global Add, Delete, & Change Guide*.

The Addressees/Salutations tab stores a constituent's addressees and salutations. You should format an addressee exactly as you want the constituent's name to appear on envelopes, reports, and labels. An addressee is usually formal, such as Ms. Joan Johnson or Mr. Thomas F. Stewart. A salutation, on the other hand, is how you greet a constituent in correspondence. Depending on your relationship with the constituent, and the type of mailing, a salutation can be formal or informal. For example, you may greet Mr. Thomas F. Stewart as Thomas

Stewart in an appeal letter and as Tom in an alumni mailing. The more addressees and salutations you track for your constituents, the more flexibility you have in addressing and greeting them. Accurately adding and formatting addressees and salutations is important. They are one of the first impressions constituents have of your organization. It is easy to get off on the wrong foot with constituents by misspelling their names or addressing them with a name they do not like.

Type	Addressee/Salutation	Editable?
Spouse Salutation	Mrs. Robert C. Hernandez	<input type="checkbox"/>
Spouse Addressee	Mrs. Hernandez	<input type="checkbox"/>
Annual Report	Dr. Robert C. Hernandez and\ Mrs. Wendy Hernandez	<input type="checkbox"/>
Alumni Addressee	Dr. Robert C. Hernandez, Class of 1987	<input checked="" type="checkbox"/>
Alumni Salutation	Bob	<input type="checkbox"/>
Informal Board Salutation	Robert	<input type="checkbox"/>
Invitation Mailing	Dr. Robert Hernandez and Guest	<input checked="" type="checkbox"/>
		<input type="checkbox"/>

Addressees and salutations are used throughout *The Raiser's Edge* in tasks other than mailings. Any time a constituent's name appears in print, you are given the opportunity to define the addressee you want to use. These tasks include reports, queries, exports, and profiles. In *Configuration*, you define the addressee and salutation formats you want to use in your database. You can create numerous combinations of the name fields that you apply to your constituents. For more information about creating these formats, see the *Configuration & Security Guide*. Take the time to ensure your constituents' names are always correct. It shows that you respect their requests and you consider their preferences important.

#### ► Selecting a primary addressee

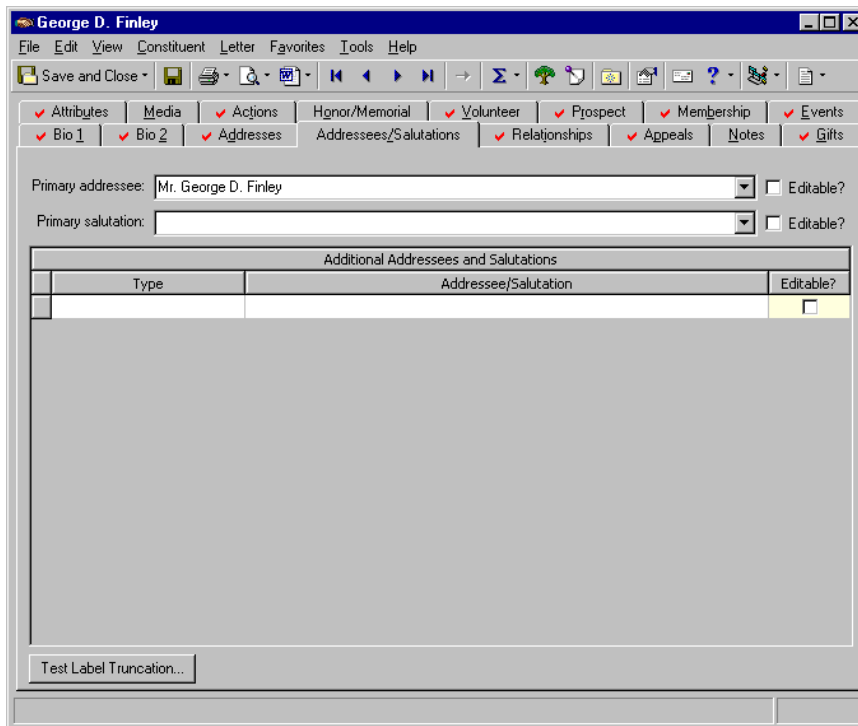
**Note:** Selecting a primary salutation and additional addressees and salutations are discussed in later procedures.

The primary addressee you select for a constituent is how he requests to be addressed the majority of the time. The primary addressee is generally used on envelopes, labels, and reports. This addressee is often formal and usually includes titles and suffixes. Examples include Dr. Ian McGregor and Ms. Cynthia Rhodes, Ph.D.

**Scenario:** You send out a quarterly newsletter and use *The Raiser’s Edge* to generate your labels. You want all constituent names to appear the same on the newsletter labels. To ensure this, select a primary addressee format that includes a title, first name, middle initial, and last name for each constituent.

**Note:** If you use a conditional or hard break when formatting an addressee or salutation in *Configuration*, a backslash appears in the addressee or salutation drop-down lists on the Addressees/Salutations tab of the constituent record. You can see where the break is in the name. However, the backslash will not appear in any other part of the program, beside *Records*.

1. From George Finley’s constituent record, select the Addressees/Salutations tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** If you mark the **Editable** checkbox, you can make manual changes to the **Primary addressee** information from the Addressees/Salutations tab.

2. In the **Primary addressee** field, select “Mr. George D. Finley”.
3. On the toolbar, click **Save and Close**.

► **Selecting a primary salutation**

**Note:** If you enter data in the **Nickname** or **Maiden name** field on the Bio 1 tab, it generates into a choice available for Addressee/Salutations.



The primary salutation you select for your constituents is how you plan to greet them in a general correspondence. It usually follows the heading “Dear” in a letter and is not as formal as an addressee. Examples include Julie Backman and Mr. Simpson.

**Scenario:** When you send out your acknowledgement letters, you want to greet all constituents in the same manner. To ensure this, select a primary salutation that includes the same title and last name format for each constituent record.

**Note:** If you use a conditional or hard break when formatting an addressee or salutation in *Configuration*, a backslash appears in the addressee or salutation drop-down lists on the Addressees/Salutations tab of the constituent record. You can see where the break is in the name. However, the backslash will not appear in any other part of the program, beside *Records*.

1. From George Finley’s constituent record, select the Addressees/Salutations tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a software window titled "George D. Finley" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations (selected), Relationships, Appeals, Notes, and Gifts. The "Addressees/Salutations" tab is active, showing two dropdown menus: "Primary addressee:" with "Mr. George D. Finley" selected and "Primary salutation:" with "Mr. Finley" selected. Each dropdown has an "Editable?" checkbox to its right, both of which are currently unchecked. Below these is a table titled "Additional Addressees and Salutations" with three columns: "Type", "Addressee/Salutation", and "Editable?". The "Editable?" column has a single row with an unchecked checkbox. At the bottom left of the window is a button labeled "Test Label Truncation..."

**Note:** If you mark the **Editable** checkbox, you can make manual changes to the **Primary salutation** information from the Addressees/Salutations tab.

2. In the **Primary salutation** field, select “Mr. Finley”.
3. On the toolbar, click **Save and Close**.

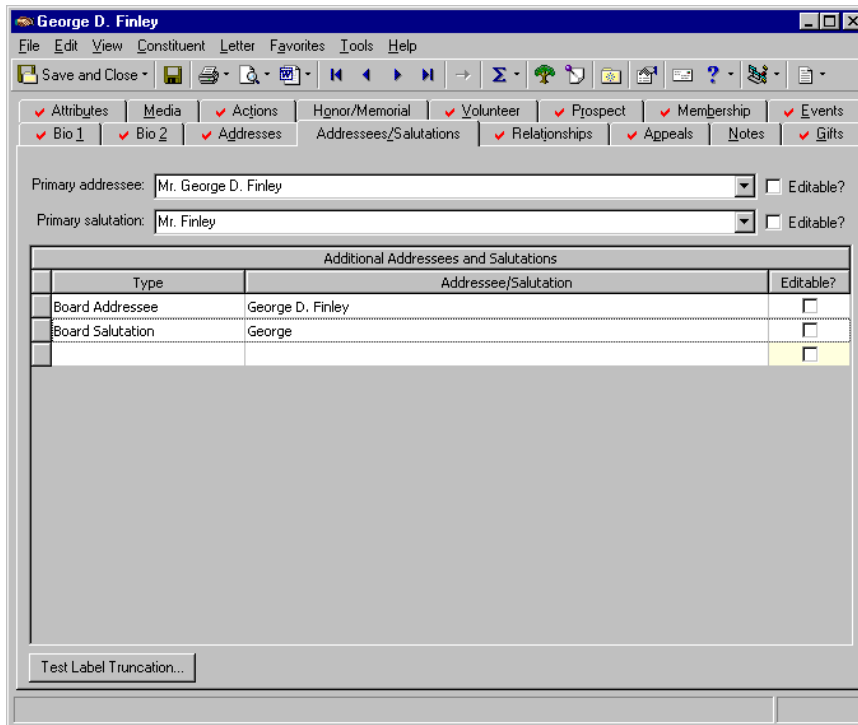
▶ **Adding an additional addressee and salutation**

In addition to a primary addressee, you can select additional addressees for each constituent to use in specific scenarios. When you add an additional addressee, you indicate the format and purpose of the addressee. For example, an Alumni addressee can be Mr. Richard Backman, while a Director addressee can be Dickie and Susan Backman.

In addition to a primary salutation, you can select additional salutations for each constituent. When you add an additional salutation, you indicate the format and purpose of the salutation. Because you send a variety of mailings to constituents, the more salutations you create, the more flexibility you have in matching the tone of each mailing. For example, an alumni salutation may be Cindy while an alumni recognition salutation (a more formal mailing) may be Ms. Cynthia Miller.

**Note:** If you use a conditional or hard break when formatting an addressee or salutation in *Configuration*, a backslash appears in the addressee or salutation drop-down lists on the Addressees/Salutations tab of the constituent record. You can see where the break is in the name. However, the backslash will not appear in any other part of the program, beside *Records*.

1. From a constituent record, select the Addressees/Salutations tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** If you mark the **Editable** checkbox, you can make manual changes to the **Addressee/Salutation** information from the Addressees/Salutations tab.

2. In the **Additional Addressees and Salutations** grid, in the first empty row of the **Type** column, select a type, such as “Board Addressee”.
3. In the same row of the **Addressee/Salutation** column, select an additional addressee format, such as “George D. Finley”.

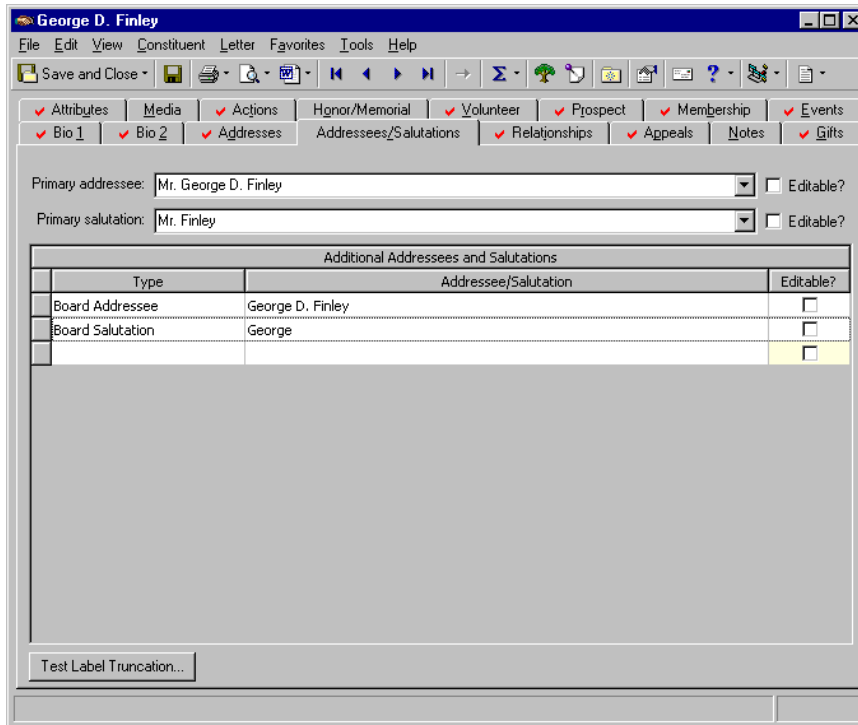
**Note:** You can delete rows from the **Additional Addressees and Salutations** grid. Select the row(s), and right-click. A menu appears. Select **Delete Rows**. A message appears asking if you are sure you want to delete the row(s). Click **OK**. You can also insert a row by selecting **Insert Row** from the menu. The new row appears above the row you select.

4. In the **Additional Addressees and Salutations** grid, in the next empty row of the **Type** column, select a salutation format, such as “Board Salutation”.
5. In the same row of the **Addressee/Salutation** column, select an addressee/salutation, such as “George”.
6. On the toolbar, click **Save and Close**.

▶ **Testing label truncation for an addressee or salutation**

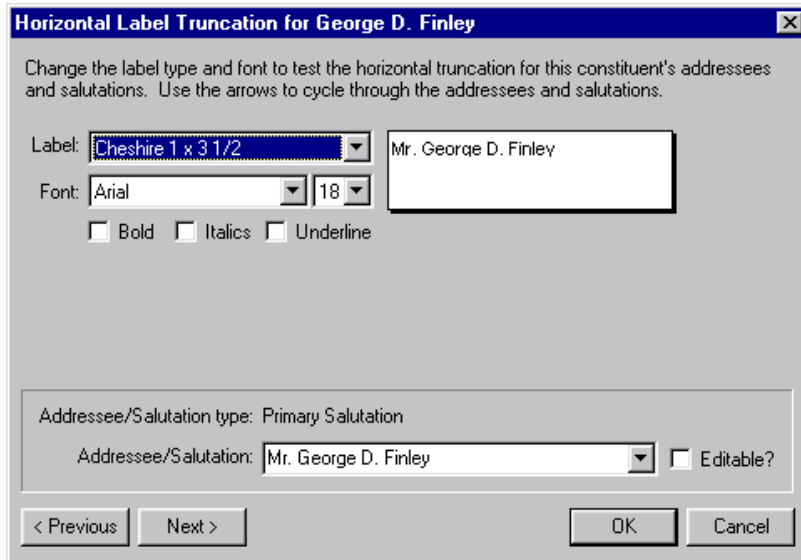
You can use the **Test Label Truncation** button to see how different font types, styles, and sizes affect the way a constituent name will appear on labels. For example, if a constituent has a lengthy name that usually takes up more than one line on a label, you can test label truncation to see if changing the font size will keep the name on a single line. If it truncates, it breaks and does not appear on the same line.

1. From a constituent record, select the **Addressees/Salutations** tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** If you use a conditional or hard break when formatting an addressee or salutation in *Configuration*, a backslash appears in the addressee or salutation drop-down lists on the **Addressees/Salutations** tab of the constituent record. You can see where the break is in the name. However, the backslash will not appear in any other part of the program, beside *Records*.

2. Click **Test Label Truncation**. The Horizontal Label Truncation screen appears.



3. Select your preferences in the **Label** and **Font** fields. You can mark **Bold**, **Italics**, or **Underline** if needed.
4. Select the **Addressee/Salutation** you want to test. You can preview your name formats on the test label to the right.
5. Click **OK**. You return to the Addressees/Salutations tab.
6. On the toolbar, click **Save and Close**.



# Relationships



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## Procedures

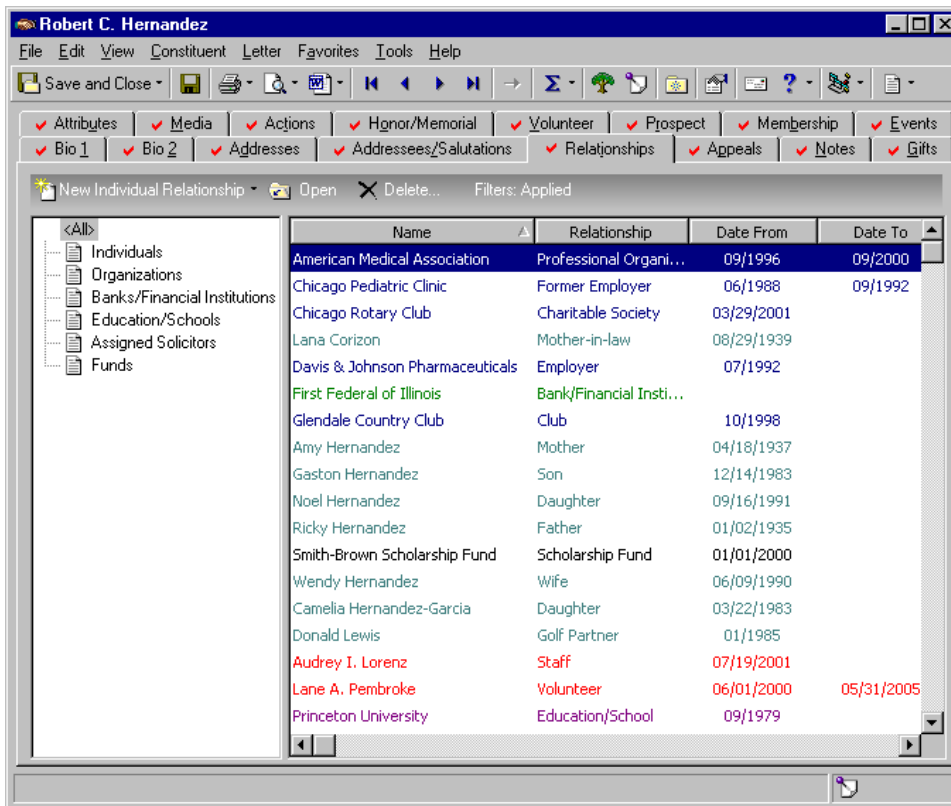
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Deleting a relationship record from the Relationships tab .....	161
Viewing the Relationship Tree from the constituent record .....	164
Filtering entries in the Relationship Tree .....	166
Selecting Legend Options for the Relationship Tree .....	170

The Relationships tab helps you track familial and social associations for your constituents. In *The Raiser's Edge*, you can track six different types of relationships for a constituent. These relationships are individuals (friends, family members, associates), organizations (businesses, clubs, employers), bank/financial institutions (credit, financial, and lending institutions), education/schools (schools, colleges, and universities), assigned solicitors (individuals or organizations assigned to secure donations from the constituent), and fund relationships (funds with which an individual or organization has a special affiliation).

## Managing Relationships

**Note:** If you have Security rights to *Administration*, you can view System Statistics. From the Administration page, click the **System Statistics** link. Up-to-date totals of all records in your database appear. This information is for viewing purposes only.

The Relationships tab helps you track familial and social associations for your constituents. In *The Raiser's Edge*, you can track six different types of relationships for a constituent. These relationships are individuals (friends, family members, associates), organizations (businesses, clubs, employers), bank/financial institutions (credit, financial, and lending institutions), education/schools (schools, colleges, and universities), assigned solicitors (individuals or organizations assigned to secure donations from the constituent), and fund relationships (funds with which an individual or organization has a special affiliation).



Relationships can have their own constituent records, or they can exist solely as nonconstituent relationship records on associated constituent records. Relationship records are similar to constituent records in that you can track valuable information on a person or business, regardless of whether they are a constituent in your database. For added convenience, relationships can be shared among constituents. For example, a shared son, daughter, or friend may exist on the Relationships tab of both a husband's constituent record and a wife's constituent record. The value of tracking a network of relationships is for connections. If you know one of your major donors is an avid golfer, you can track his three golfing partners as individual relationships. Then, when you start planning your annual golf tournament, you can invite your constituent's three partners and hopefully, secure additional donations and three new constituents.

The Relationships tab is linked to other tabs on the constituent record. For example, if you add a spouse on the Bio 1 tab of Robert Manning's constituent record, that person automatically appears as an individual relationship on Robert's Relationships tab. If you add business or education information on the Bio 1 tab for Tina Russell, it is automatically added as an organization or education/school relationship on the Relationships tab of Tina's constituent record. This also works in reverse. For example, First Federal of Illinois is listed as Robert Hernandez's primary bank on the Bio 1 tab. From the Relationships tab, you add Southern Bank as a second bank relationship and mark the checkbox for **Primary bank information**. When you attempt to save this new relationship, a message appears, informing you that Robert already has a primary bank record and asks if you want to overwrite it with this new information. If you answer **Yes**, the bank information you added on the Relationships tab automatically appears on the Bio 1 tab. Because information is shared between tabs, make sure your data entry is accurate and current.

**Note:** From the right-click menu, you can print the contents of the grid on the Relationships tab. You can also export the information to *Excel* or another application.

On the Relationships tab, you can apply filters to customize what you want to view on the tab. On the action bar of the Relationships tab, click **Filters**. The Filters screen appears. On the Filters screen, you can make selections in the **Relationship** and **Reciprocal** fields and enter a **Date from** and **Date to** to filter by dates. For example, on the Relationships tab, maybe you want to view only constituents who are employees from January 1.

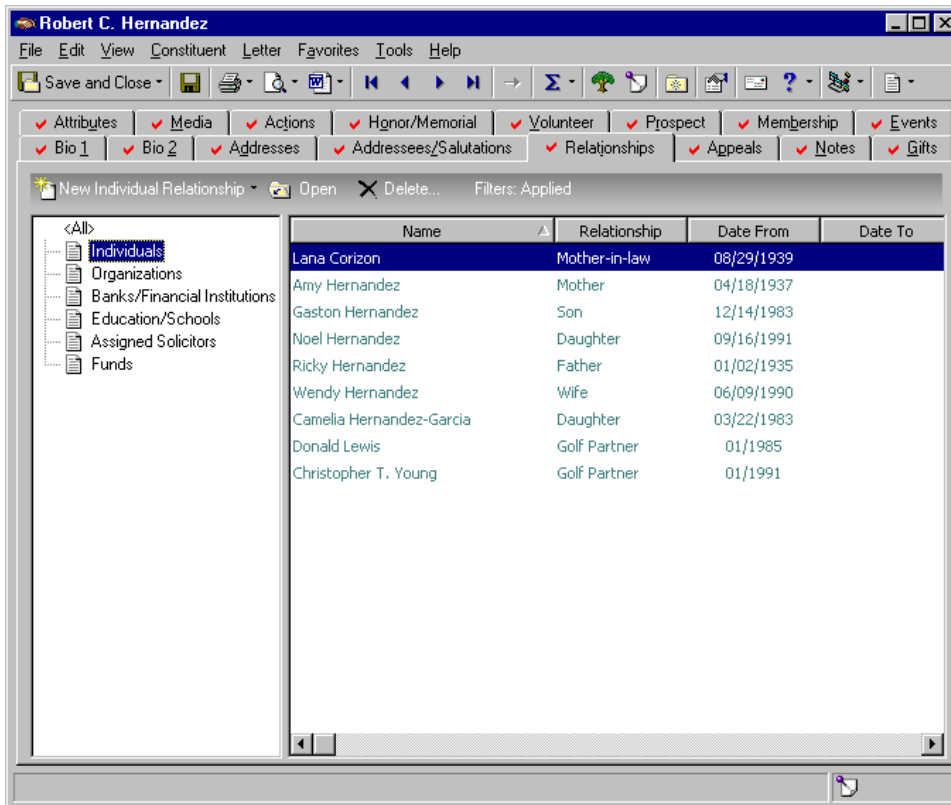
On the Filters screen, you can also unmark the **Hide spouse relationships** checkbox to view both a constituent and the spouse's relationships on the tab. The **Hide spouse relationships** checkbox is marked by default so no spouse relationships appear unless you do so.

In this section, we show you how to add and maintain individual, organization, fund, bank, and education relationships. For information about assigned solicitors, see "Solicitors" on page 291.



## Individual Relationships

Individual relationships are the people with whom your constituents are associated in some way. They may be a spouse, friend, family member, or business associate. They can have their own constituent record or exist solely as nonconstituent relationship records on associated constituent records. If the individual is a constituent in your database, the two records are linked together, and they can appear on each other's respective Relationships tabs. For added convenience, individual relationships can be shared among constituents. For example, a friend may be shared by both a husband and wife and exist on the Relationships tab of both the husband's constituent record and the wife's constituent record.



**Note:** If a relationship is a constituent in your database, you can go directly to that constituent record by selecting **Relationship, Go to** from the menu bar of the Relationship screen.

The fields available for an individual relationship record are similar to those available for an individual constituent record. But, only three tabs appear on an individual relationship screen — General 1, General 2, and Attributes/Notes.

If you have *The Raiser's Edge* and *The Education Edge* and integrate the two systems, an Addresses tab also appears on your nonconstituent individual relationship records. This tab appears only if the two programs are integrated and the relationship record is linked to an *Education Edge* record. For more information about this tab and the integration of these two programs, see *The Raiser's Edge and The Education Edge Integration Guide*.

The General 1 tab contains fields for the relationship name, address, telephone numbers and email addresses, nickname, maiden name, business information, and educational history. Fields are also available specific to the relationship screen. These fields are **Relationship**, **Reciprocal**, **Date from**, and **to**. The **Relationship** field defines the nature of the association the individual has to the constituent. The **Reciprocal** field defines the relationship of the constituent to the individual. For example, Dorothy Hawes is a constituent in your database, and you add her son Jeff as an individual relationship. In this example, the **Relationship** is Son and the **Reciprocal** is Mother. You define the length of time the relationship has existed in the **Date from** and **to** fields.

**Individual Relationship for Dorothy Hawes**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

**Biographical**

Last name: Hawes Aliases

First name: Jeffrey

Middle name: Bryant

Titles: Mr.

Suffixes:

Nickname: Jeff

Maiden name:

ID:

Business  Education

**Address : Home**

Country: United States More...

Address lines: 1415 Heyward Street

City: Mt. Pleasant

State: SC South Carolina

ZIP: 29464 DPC: 00

Phones/Email/Links			
DNC	Type	Number/Email A...	Shared?
	Home	843-555-0909	Not Shared
	Email	jeff.hawes@ho...	Cannot be ...

This individual is the:

Spouse

Relationship: Son

Reciprocal: Mother

Date from: 01/13/1959 to

On the General 1 tab, you can mark the **Spouse** checkbox to determine whether the individual relationship is the spouse, or domestic partner. When you add a spouse or domestic partner for a constituent, you are creating a new individual relationship record for that constituent. The new individual spouse relationship can exist solely as a nonconstituent relationship record on the primary constituent's record or have its own constituent record in your database.

**Individual Relationship for Janet L. Cothran**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

**Biographical**

Last name: Cothran Aliases

First name: Robert

Middle name: Anderson

Titles: Dr.

Suffixes: . M.D.

Nickname: Rob

Maiden name:

ID: 231

Business  Education

This individual is the:

Spouse

"Head of Household"

**Address : Home**

Country: United States More...

Address lines: 1428 Friendship Street

City: Stillwater

State: OK Oklahoma

ZIP: 74078 DPC:

Phones/Email/Links			
DNC	Type	Number/Email A...	Shared?
	Home	405-555-6770	Shared

Relationship: Husband

Reciprocal: Wife

Date from: 05/08/2004 to

If the spouse is a constituent in your database, a **Head of Household** checkbox appears under the **Spouse** checkbox so you can determine who should be designated head of household. In *Mail* processing, the **Head of Household** checkbox can be used to determine who should receive a particular mailing. For information about how this checkbox can affect your mailings, see the *Mail Guide*.

The General 2 tab contains fields that maintain additional data for the relationship. On this tab, you can track the **Gender**, **SSN** (Social Security Number), **Birth date**, and **Age**. If the person has passed away, you can mark the **Deceased?** checkbox and enter a date.

The screenshot shows a software window titled "Individual Relationship for Janet L. Cothran". The window has a menu bar (File, Edit, View, Relationship, Help) and a toolbar. The "General 2" tab is selected. The fields are as follows:

- Gender: Male (dropdown)
- SSN: 2222-11-3333 (text box)
- Deceased?:  (checkbox)
- Date: (calendar icon)
- Birth date: 02/02/1955 (calendar icon)
- Age: 49 (text box)
- Primary addressee: Dr. Robert A. Cothran (dropdown)
- Primary salutation: Dr. Cothran (dropdown)

Below these fields is a table titled "Addressees and Salutations for Robert A. Cothran":

Type	Addressee/Salutation	Editable?
Invitation Mailing	Dr. and Ms. Robert A. Cothran	<input type="checkbox"/>

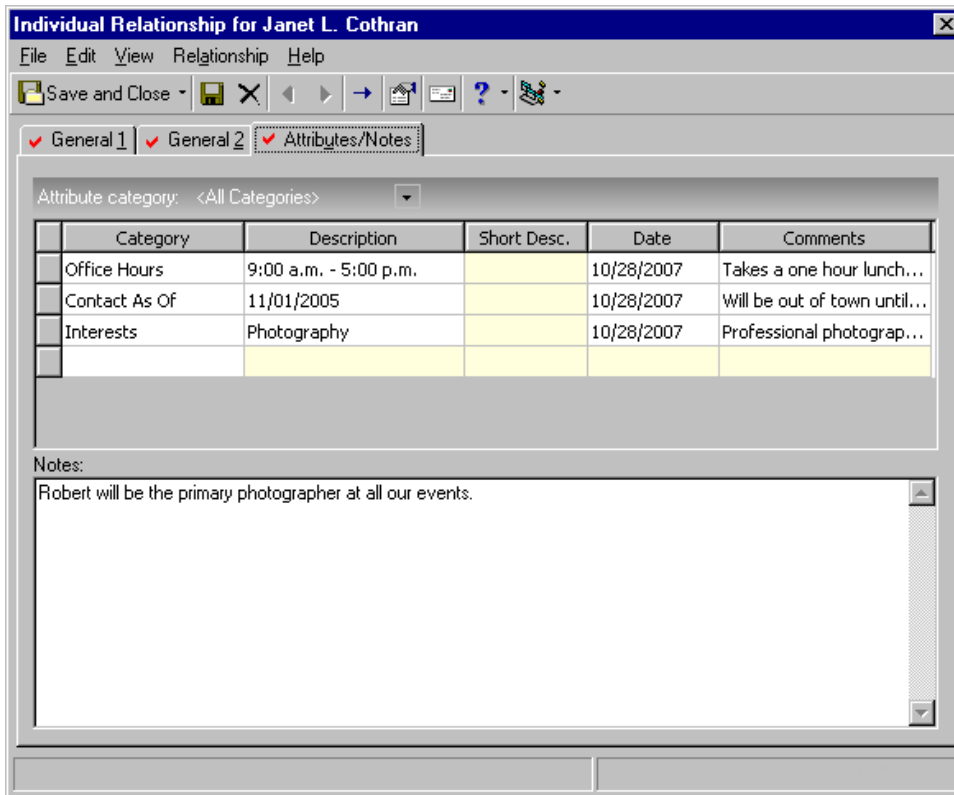
At the bottom of the window, there is a "Test Label Truncation..." button and a checked checkbox labeled "Automatically soft credit this individual for gifts".

The General 2 tab is also where you define a **Primary addressee** and **Primary salutation** for the relationship. These are used in mailings to the relationship, just as they are for constituents. You are also able to define additional addressees and salutations for the individual relationship. For more information about addressees and salutations, see "Addressees/Salutations" on page 105.

For an individual relationship who is a constituent in your database, the fields at the top of the General 2 tab and the addressees and salutations default onto the individual relationship record from the relationship's constituent record. To change the information in any of these fields, you must do so from the constituent record.

For an individual relationship who is a constituent in your database, an **Automatically soft credit this individual for gifts** checkbox appears on the General 2 tab. A soft credit enables more than one constituent to share credit for a single gift without adding duplicate gift records to the database. You can mark this checkbox to soft credit the relationship for gifts given to your organization. For more information about soft credits, see the *Gift Records Guide*.

To track miscellaneous information about the individual relationship, you should use the Attributes/Notes tab. If the individual has special interests, dietary preferences, requests, or interesting qualities you want to remember, add them here as an attribute or note.



For more information about attributes, see “Attributes” on page 176. For more information about Notes, see “Notes” on page 179.

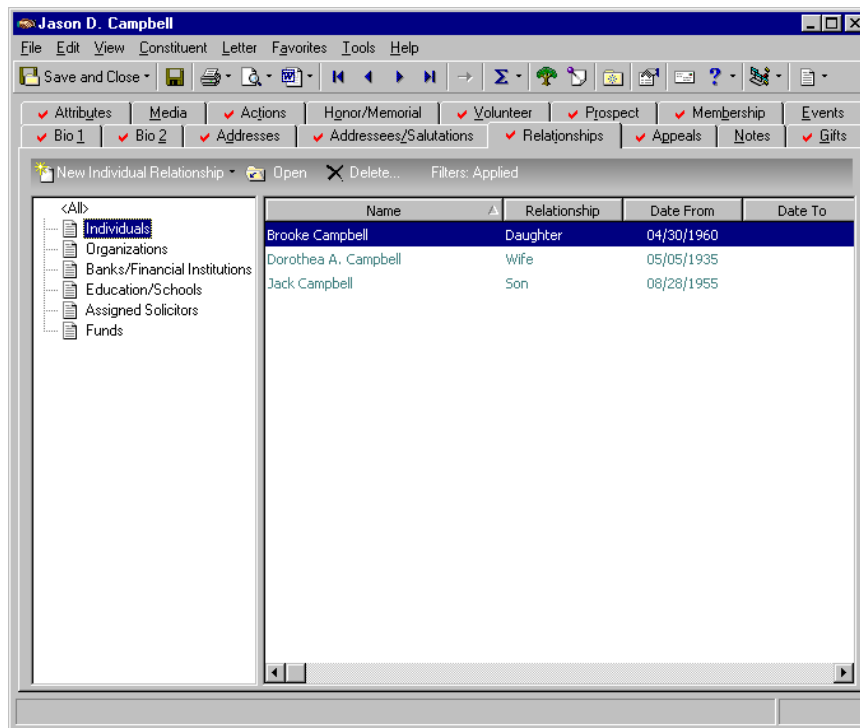
► **Adding an individual relationship record from the Relationships tab**

When you add an individual relationship to a constituent record, you indicate the constituent has an affiliation with that individual. For example, you can track biographical data for a constituent’s spouse or domestic partner, child, parent, coworker, or tennis partner.

**Scenario:** Jason Campbell is a constituent in your database. He gives you a family prospect card for his sister Rachel. From the Relationships tab of Jason’s constituent record, add Rachel as a new individual relationship. Include her name, address, phone number, relationship, reciprocal, birth date, Social Security Number, primary addressee, primary salutation, and any additional attributes.

**Note:** From the right-click menu, you can print the contents of the grid on the Relationships tab. You can also export the information to *Excel* or another application.

1. From Jason Campbell's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



2. From the tree view on the left, select **Individuals**.

**Note:** You can make an individual relationship a constituent in your database by selecting **Relationship, Add this individual as a Constituent** from the menu bar of the Individual Relationship screen.

- On the action bar above the tree view, click **New Individual Relationship**. The New Individual Relationship screen appears.

**New Individual Relationship for Jason D. Campbell**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

**Biographical**

Last name: Campbell Aliases

First name: Rachel

Middle name:

Titles: Ms.

Suffixes:

Nickname:

Maiden name:

ID:

Business Education

This individual is the:

Spouse

**Address - Home**

Country: United States  More...

Address lines: 250 First Avenue

City: Athens

State: GA Georgia

ZIP: 30606 DPC:

Phones/Email/Links			
DNC	Type	Number/Email A...	Shared?
<input type="checkbox"/>	Home	706-555-1290	Not Shared

Relationship: Sister

Reciprocal: Brother

Date from: 08/29/1975  to

**Note:** Remember to always click the binoculars in the **Last Name** field and search the database to make sure the relationship is not already in your database. You can search for constituents and nonconstituents. To search for nonconstituents, on the Open screen, mark the **Display nonconstituents** checkbox.

- Select the General 1 tab.
- In the **Last name** field, enter “Campbell”; and in the **First name** field, enter “Rachel”.
- In the first **Titles** field, select “Ms.”
- In the **Country** field, select “United States”.
- In the **Address lines** box, enter “250 First Avenue”.
- In the **City** field, enter “Athens”; in the **State** field, select “GA”; and in the **ZIP** field, enter “30606”.
- In the **Phones/Email/Links** grid, select “Home” in the **Type** column; in the **Number/Email Address** column, enter the number 706-555-1290. In the **Shared** column, “Not Shared” appears by default beside this new phone number. This means that in *Configuration Tables*, in Phone Types, on the Edit Phone Types screen for Home phone numbers, you did not mark the **Do not share phones of this type** checkbox, enabling this Home phone type to be shared. If you later decide to make Rachel a constituent in your database and copy/link her address with another constituent or nonconstituent relationship, her Home phone number will be shared. If you do not want Rachel’s Home phone number to be shared, select “Do Not Share” in this column. For more information about copying and sharing addresses and phone sharing, see “Copying and Linking Relationship Addresses” on page 146 and “Phone Sharing” on page 157. For more information about *Configuration Tables*, see the *Configuration & Security Guide*.
- In the row beside a phone number or email address, you can mark the **DNC** (Do Not Contact) column. When you click in this column, a visual warning appears. From this point on, you quickly see that you should not contact the constituent at the number or email address. For this scenario, do not mark the **DNC** column. Rachel wants to be contacted at this number.

**Note:** When you enter data in the **Nickname** or **Maiden name** field, it generates into a choice available for Addressees/Salutations.

12. If a relationship has a **Nickname** or **Maiden name**, enter it in the appropriate fields. Rachel has neither, so you can leave these two fields blank.
13. Do not mark the **Spouse** checkbox. Rachel is Jason’s sister, not his spouse.

**Note:** If an individual relationship is a spouse who has a constituent record in your database, a **Head of Household** checkbox appears on the General 1 tab of the individual relationship record (under the **Spouse** checkbox), so you can determine who should be designated head of household. In *Mail* processing, the **Head of Household** checkbox can determine who should receive a particular mailing. For more information about how this checkbox can affect your mailings, see the *Mail Guide*.

14. In the **Relationship** field, select “Sister”. In the **Reciprocal** field, select “Brother”.
15. In the **Date from** field, enter the date 08/29/1975. This is the date the relationship began.
16. Select the General 2 tab.

The screenshot shows a software window titled "New Individual Relationship for Jason D. Campbell". The window has a menu bar with "File", "Edit", "View", "Relationship", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Close", "Previous", "Next", "Print", "Help", and "Refresh". The main area has three tabs: "General 1" (selected), "General 2", and "Attributes/Notes".

Under the "General 1" tab, there are several fields:

- Gender: Female (dropdown menu)
- SSN: 249-55-0000 (text field)
- Deceased?:  (checkbox)
- Date: (empty text field)
- Birth date: 08/29/1975 (calendar icon)
- Age: 29 (text field)
- Primary addressee: Ms. Rachel Campbell (dropdown menu)
- Editable?:  (checkbox)
- Primary salutation: Ms. Campbell (dropdown menu)
- Editable?:  (checkbox)

Below these fields is a table titled "Addressees and Salutations for Rachel Campbell". The table has three columns: "Type", "Addressee/Salutation", and "Editable?". There is one row in the table with an empty "Type" field, an empty "Addressee/Salutation" field, and an "Editable?" checkbox that is currently unchecked.

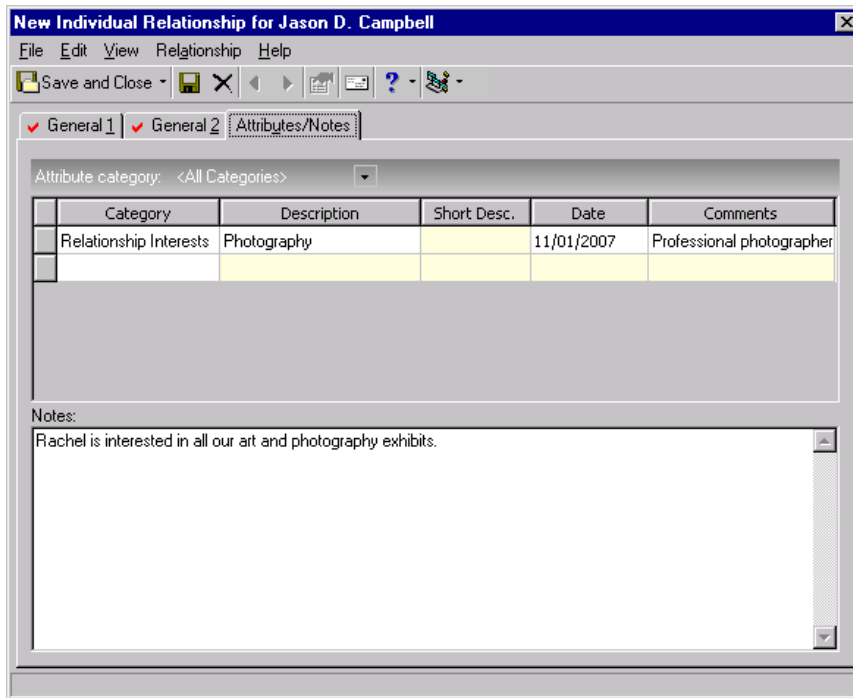
At the bottom of the window, there is a button labeled "Test Label Truncation...".

**Note:** For an individual relationship who is a constituent in your database, an **Automatically soft credit this individual for gifts** checkbox appears on the General 2 tab. A soft credit enables more than one constituent to share credit for a single gift without adding duplicate gift records to the database. You can mark this checkbox to soft credit the relationship for gifts given to your organization. For more information about soft credits, see the *Gift Records Guide*.

17. In the **Gender** field, select “Female”.
18. In the **SSN** (Social Security Number) field, enter “249-55-0000”.
19. In the **Birth date** field, enter the date 08/29/1975.
20. In the **Primary addressee** field, select “Ms. Rachel Campbell”.
21. In the **Primary salutation** field, select “Ms. Campbell”.



22. Select the Attributes/Notes tab.



Attribute category: <All Categories>

Category	Description	Short Desc.	Date	Comments
Relationship Interests	Photography		11/01/2007	Professional photographer

Notes:  
Rachel is interested in all our art and photography exhibits.

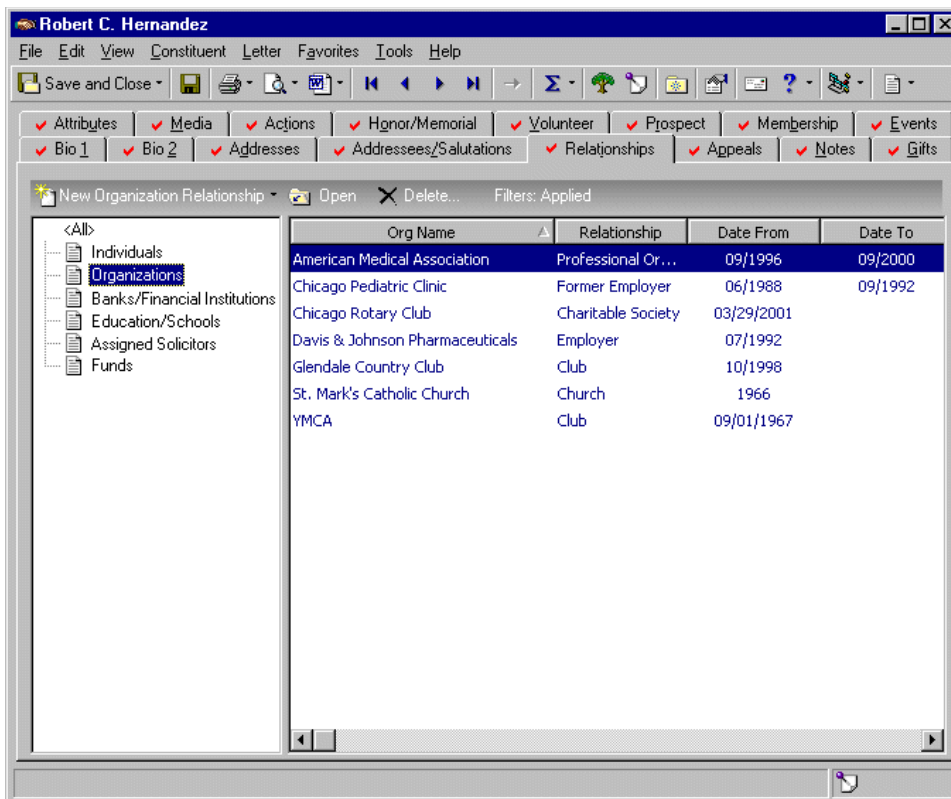
23. In the Attributes grid, select “Relationship Interests” in the **Category** column.
24. In the **Description** column, select “Photography”.
25. In the **Date** column, enter the date you are adding this attribute.
26. In the **Comments** column, enter “Professional photographer”.
27. In the **Notes** box, enter “Rachel is interested in all our art and photography exhibits.”

**Note:** When you make changes to an address and save your changes, if the address is linked to other records, a message appears, letting you know the address is shared. You can select to change the address on all records that share the address, select to change the address on only this record, or click **Cancel**. To help you determine if you want to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

28. On the toolbar, click **Save and Close**. You return to the Relationships tab of Jason’s constituent record.
29. Click **Save and Close**.

## Organization Relationships

Organization relationships are the businesses, clubs, churches, agencies, and other organizations that have some sort of association with your constituents. A constituent may be a member of a religious institution, museum, or social club; an employee of a hospital; or serve on the board for a local nonprofit organization. Organization relationships can have their own constituent records, or they can exist solely as nonconstituent relationship records on associated constituent records. If the organization is a constituent in your database, the two records are linked together and they can appear on each other's respective Relationships tabs. For added convenience, organization relationships can be shared among constituents. For example, a church may be shared by both a husband and wife and exist on the Relationships tab of both the husband's constituent record and the wife's constituent record.



**Note:** If a relationship is a constituent in your database, you can go directly to that constituent record by selecting **Relationship, Go to** from the menu bar of the Relationship screen.

The fields available for an organization relationship are similar to those available for an organization constituent. But, only three tabs appear on the organization relationship screen — General 1, General 2, and Attributes/Notes.

If you have *The Raiser's Edge* and *The Education Edge* and integrate the two systems, an Addresses tab appears on your nonconstituent organization relationship records. This tab appears only if the two programs are integrated and the relationship record is linked to an *Education Edge* record. For more information about this tab and the integration of these two programs, see *The Raiser's Edge and The Education Edge Integration Guide*.

The General 1 tab tracks the organization name, address, telephone numbers and email addresses, industry, profession, position, and income. Four fields are available to add business-type information for constituents whose association to the organization relation is employee. Fields are also available specific to the relationship screen. These fields are **Relationship**, **Reciprocal**, **Date from**, and **to**. The **Relationship** field defines the nature of the association the organization has to the constituent. The **Reciprocal** field defines the relationship of the constituent to the organization. For example, Mark Adamson is a constituent in your database and you add Charleston Development Corporation as an organization relationship for Mark. In this example, the **Relationship** is Employer and the **Reciprocal** is Employee. You can define the length of time the relationship has existed in the **Date from** and **to** fields.

**Organization Relationship for Mark D. Adamson**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

Org name: Charleston Development Corporatio ID: 107 Aliases

Country: United States More... Industry: Financial

Address lines: 843 Leeds Avenue Position: Financial Analyst Print?

City: Charleston Profession: Financial Planning

State: SC South Carolina Income: \$90,000 - \$99,999

ZIP: 29407 DPC: Relationship: Employer

Reciprocal: Employee

Date from: 01/02/1994 to

Print organization name with address

Phones/Email/Links			
DNC	Type	Number/Email Ad...	Shared?
	Business	843-555-5569	Shared

For this organization, this individual is a(n):

Employee  Primary business information

Contact  Do not mail to this contact

Contact type: Corporate Donations

**Note:** When *MatchFinder* is installed on your computer, a **MatchFinder** button appears on the Records page. A **MatchFinder** button appears on the Org 1 tab of an organization record and on the General 2 tab of all organization relationship records. Also, if a constituent's matching gift is linked to a MatchFinder record, a **MatchFinder** button appears on the Matching Gifts screen, accessed from the Matching Gifts tab of the gift record. For more information, see the *MatchFinder Guide*.

The General 2 tab tracks matching gift information for an organization relationship that matches gifts. If the organization relationship is a constituent in your database and an organization relationship that matches gifts (hereafter referred to as a matching gift company), the matching gift information defaults onto the General 2 tab from the Org 1 tab of the matching gift company's constituent record, if the **Organization matches gifts** checkbox on the Org 1 tab is marked.

**Organization Relationship for Mark D. Adamson**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

Charleston Development Corporation matches gifts from Mark D. Adamson

Matching Gift Information

Factor: 2.00 Fiscal year starts: 01/01

Matching Gift Limits		
	Minimum	Maximum
Per gift	\$10.00	\$1,000.00
Annual per donor	\$10.00	\$12,000.00
Total per donor	\$10.00	\$120,000.00

Notes:  
Charleston Development Corporation matches only for full-time employees.

Automatically soft credit this organization for gifts

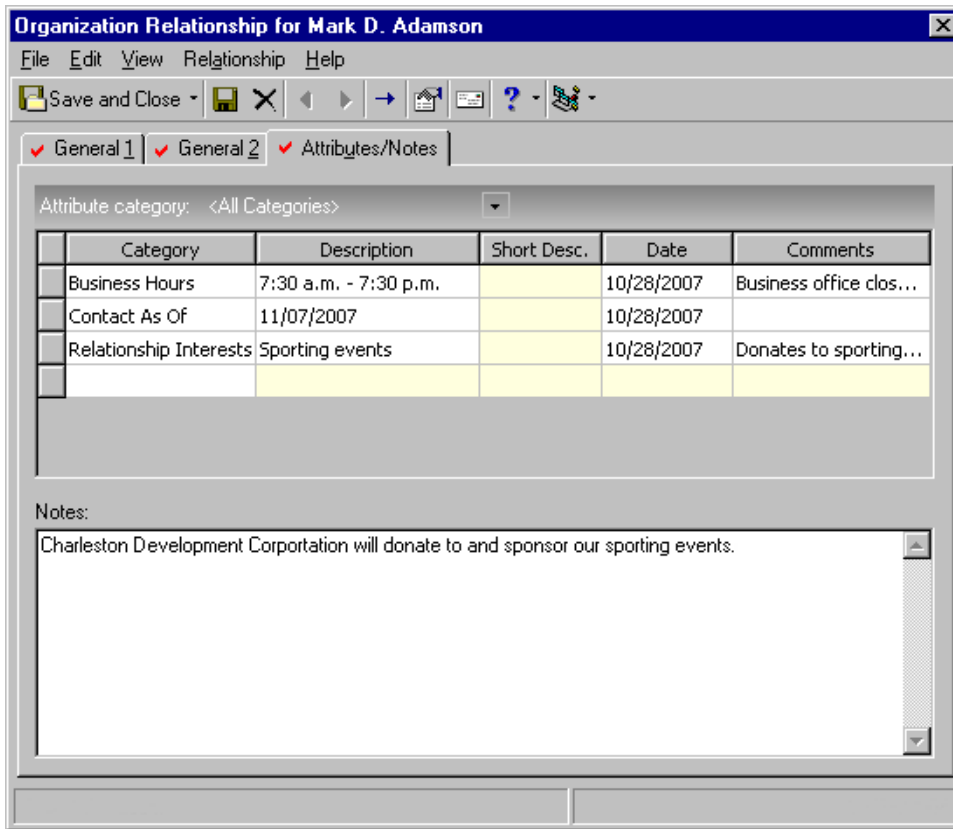
You can change the information that defaults onto the General 2 tab. For example, Charleston Development Corporation normally matches gifts on a one-to-one basis, and this **Factor** defaults onto the General 2 tab. For employees who have been with the company for more than five years, the company matches on a larger two-to-one basis. You decide to manually change the **Factor** on the General 2 tab to reflect this. *The Raiser's Edge* recognizes that you made a change on the General 2 tab. The information you change on the General 2 tab does not change on the Org 1 tab. That information remains the way you originally entered it.

When you add a gift to the database for an individual who works for a matching gift company, *The Raiser's Edge* checks the Org 1 tab of the matching gift company's constituent record to confirm that the organization does truly match gifts (that the **Organization matches gifts** checkbox on the Org 1 tab is marked). Then, the program checks the General 2 tab on the relationship record to confirm the **Factor**, when the **Fiscal year starts**, and the **Matching Gifts Limits**.

If you unmark the **Organization matches gifts** checkbox on the Org 1 tab of the matching gift company's constituent record, but leave the same checkbox marked on the General 2 tab, when you add a gift to the database for the individual constituent who works for the matching gift company, *The Raiser's Edge* ignores the unmarked checkbox on the Org 1 tab and lets the matching gift be added anyway. For matching gifts added automatically, the program first confirms on the General 2 tab that the organization does indeed match gifts. This is an exception to the rule.

On the General 2 tab, for an organization relationship that is a constituent in your database, an **Automatically soft credit this organization for gifts** checkbox also appears. A soft credit enables more than one constituent to share credit for a single gift without adding duplicate gift records to the database. You can mark this checkbox if you want to soft credit the relationship for gifts given to your organization. For more information about soft credits, see the *Gift Records Guide*.

To track miscellaneous information about an organization relationship, you should use the Attributes/Notes tab. If the organization relationship has special interests, donation instructions, or other requests, add them here as an attribute or note.



For more information about attributes, see “Attributes” on page 176. For more information about notes, see “Notes” on page 179.

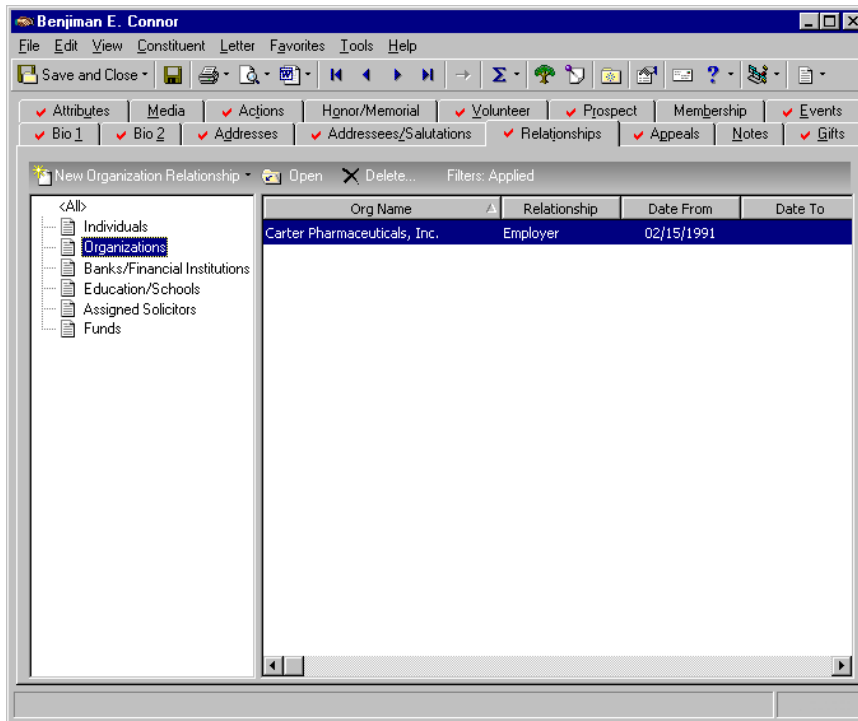
► **Adding an organization relationship record from the Relationships tab**

When you add an organization relationship to a constituent record, you indicate the constituent has an affiliation with the organization. For example, you can track a constituent’s employer or church. You can also track organizations for which the constituent is a member or volunteer.

**Scenario:** You learn that Ben Connor serves on the board of directors for the Oak City Symphony Orchestra. From Ben’s constituent record, add Oak City Symphony Orchestra as a new organization relationship. Include information for the address, phone number, relationship, reciprocal, date from and date to. Make sure you reciprocate Ben as a relationship for Oak City Symphony Orchestra.

**Note:** From the right-click menu, you can print the contents of the grid on the Relationships tab. You can also export the information to *Excel* or another application.

1. From Ben Connor’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Organizations**.

**Note:** If an organization relationship is not already a constituent in your database, you can make it a constituent by selecting **Relationship, Add this organization as a Constituent** from the menu bar of the Organization Relationship screen.

- On the action bar above the tree view, click **New Organization Relationship**. The New Organization Relationship screen appears.

- Select the General 1 tab.
- In the **Org name** field, click the binoculars to search your database for Oak City Symphony Orchestra. When found and selected, the address and phone/email information for the organization appears on the New Organization Relationship screen for Ben. It defaults from the organization record.

**Note:** When you search your database and select a nonconstituent organization relationship record instead of an organization constituent record, you must manually enter address and phone number information. To search your database for nonconstituents, on the Open screen mark the **Display nonconstituents** checkbox.

- In the **Relationship** field, select “Nonprofit Organization”. In the **Reciprocal** field, select “Board Member”.
- In the **Date from** field, enter today’s date. You can leave the **to** field blank because you do not know how long Ben is going to serve on the board.
- Mark the **Contact** checkbox and in the **Contact type** field, select “Board”. Ben has been designated as a contact for Oak City Symphony Orchestra because he serves on the Board of Directors.

9. Select the General 2 tab.

The screenshot shows a software window titled "New Organization Relationship for Benjamin E. Connor". The window has a menu bar with "File", "Edit", "View", "Relationship", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Close", "Previous", "Next", "Print", "Help", and "Refresh". The window has three tabs: "General 1" (selected), "General 2", and "Attributes/Notes".

Under the "General 2" tab, there is a checkbox labeled "Oak City Symphony Orchestra matches gifts from Benjamin E. Connor" which is currently unchecked. Below this is a section titled "Matching Gift Information" containing two input fields: "Factor:" and "Fiscal year starts:". To the right of these fields is a "Notes:" text area.

Below the "Matching Gift Information" section is a table titled "Matching Gift Limits":

	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

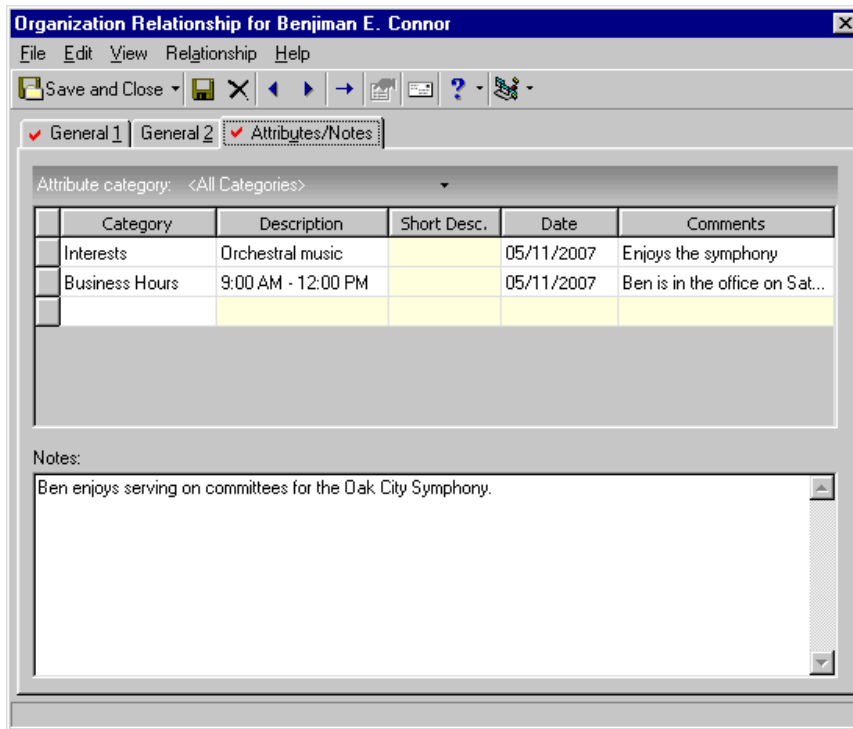
At the bottom of the "General 2" tab, there is another checkbox labeled "Automatically soft credit this organization for gifts" which is also unchecked.

**Note:** For an organization relationship that is a constituent in your database, an **Automatically soft credit this organization for gifts** checkbox appears on the General 2 tab. A soft credit enables more than one constituent to share credit for a single gift without adding duplicate gift records to the database. You can mark this checkbox if you want to soft credit the relationship for gifts given to your organization. For more information about soft credits, see the *Gift Records Guide*.

10. Because Oak City Symphony Orchestra does not match gifts given to your organization by Ben, you can leave the fields on this tab blank. If the **Organization matches gifts** checkbox was marked on Oak City Symphony Orchestra's constituent record, the information in the corresponding fields would default onto the General 2 tab.



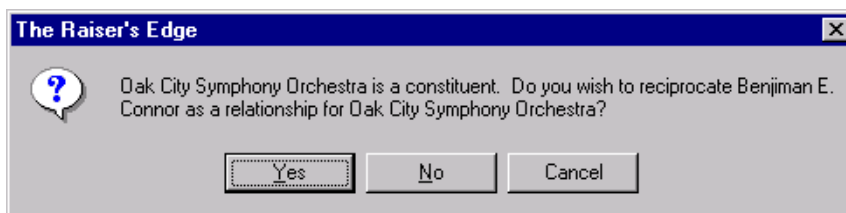
11. Select the Attributes/Notes tab.



12. Enter attributes and notes as shown in the previous picture. For more information on adding attributes, see “Attributes” on page 176. Once you learn to add attributes in one part of *The Raiser’s Edge*, it is easy to apply those principles to other places in the program.

**Note:** When you make changes to an address and save your changes, if the address is linked to other records, a message appears, letting you know the address is shared. You can select to change the address on all records that share the address, select to change the address on only this record, or click **Cancel**. To help you determine if you want to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

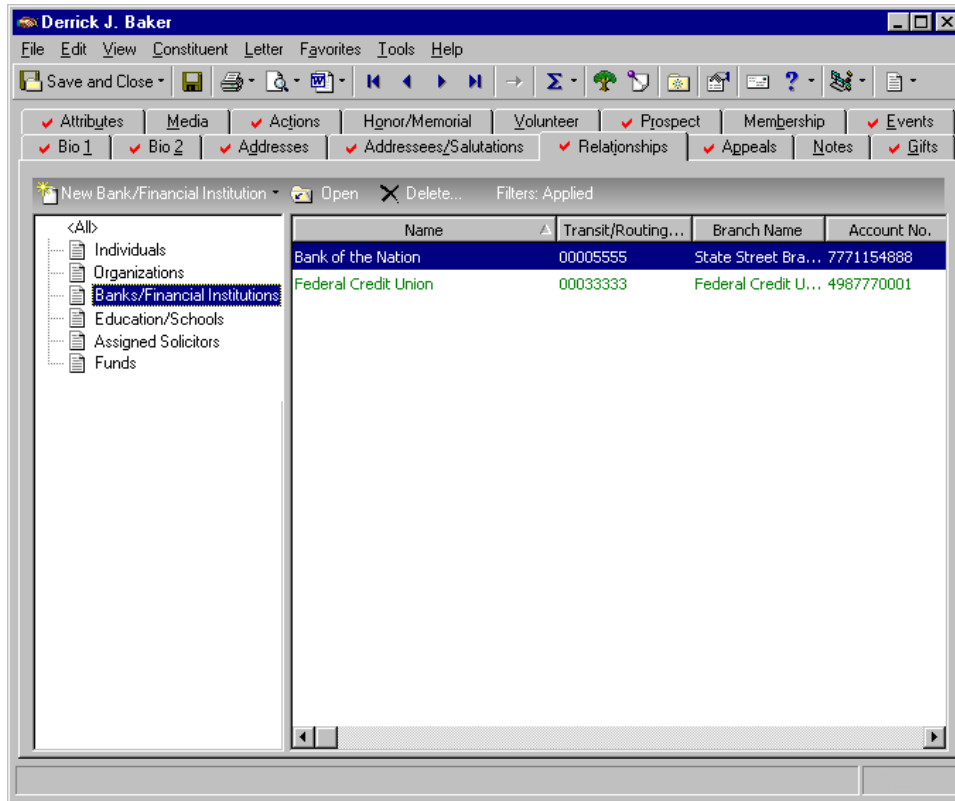
13. On the toolbar, click **Save and Close**. A message appears, asking if you want to reciprocate Ben Connor as a relationship for the Oak City Symphony Orchestra.



14. Click **Yes**. Ben Connor now appears on the Relationships tab of Oak City Symphony Orchestra’s constituent record. You return to the Relationships tab of Ben’s constituent record.
15. On the toolbar, click **Save and Close**.

# Bank/Financial Relationships

Bank relationships are associations your constituents have with banks or other financial institutions.



Your constituents may have checking or savings accounts at a particular bank, or they may ask you to automatically withdraw funds on a monthly basis to cover a recurring gift. Tracking a constituent's bank information makes monetary transactions fast and easy for both you and the constituent. A bank should be listed in the **Financial Institutions** section of *Configuration* before you add it to a constituent's record as a relationship. You should search for the bank name in the **Financial Institutions** field to avoid duplication and data entry errors.

**New Bank/Financial Institution for Derrick J. Baker**

File Edit View Bank Help

Save and Close

General | Account Attributes/Notes

Transit/Routing no.: 00033333

Financial Institution: Federal Credit Union

Branch name: Federal Credit Union - Southeast

Bank notes: FCU does accept EFT payments.

Bank/Branch Address

Country: United States

Address lines: 1402 Rivers Avenue

City: Charleston

State: SC South Carolina

ZIP: 29407

Region: Southeast

Electronic Transfer Information

Immediate origin:

Use Transit/Routing number

Other

Account Information

Account number: 2164 0987 1234

Account type: Checking

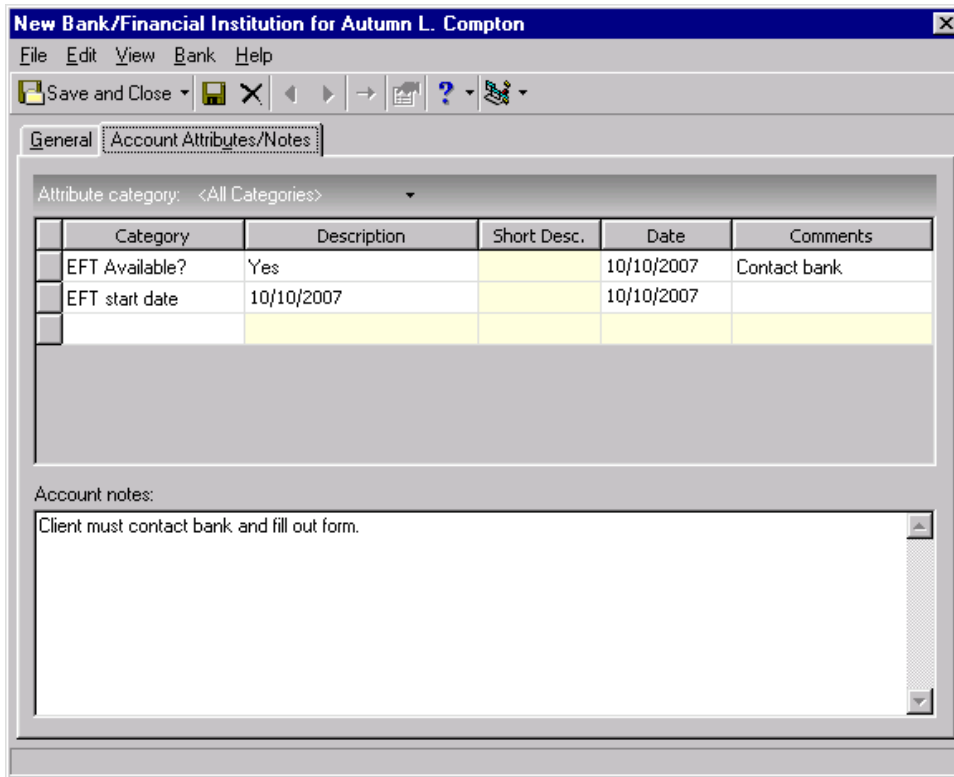
Phones/Email/Links

DNC	Type	Number/Email Address
	Bank	800-555-9918

Primary bank information  This account is inactive

The fields available for a bank relationship are primary fields that are necessary for any banking transaction. Bank name, branch name, address, phone numbers/email addresses, routing number, and account information are all found on the General tab of the bank relationship screen. A checkbox appears so you can indicate if the financial institution is the constituent's primary banking information. When you mark this checkbox, the information is automatically copied over to the Bio 1 tab of the constituent's record. If a bank record already exists, **The Raiser's Edge** asks if you want to overwrite the old record with the new record. A section exists for electronic transfer information, as well as notes concerning the bank. For more information about adding new banks to your database, see the *Configuration & Security Guide*.

Use the Account Attributes/Notes tab to track any miscellaneous information about the bank relationship.



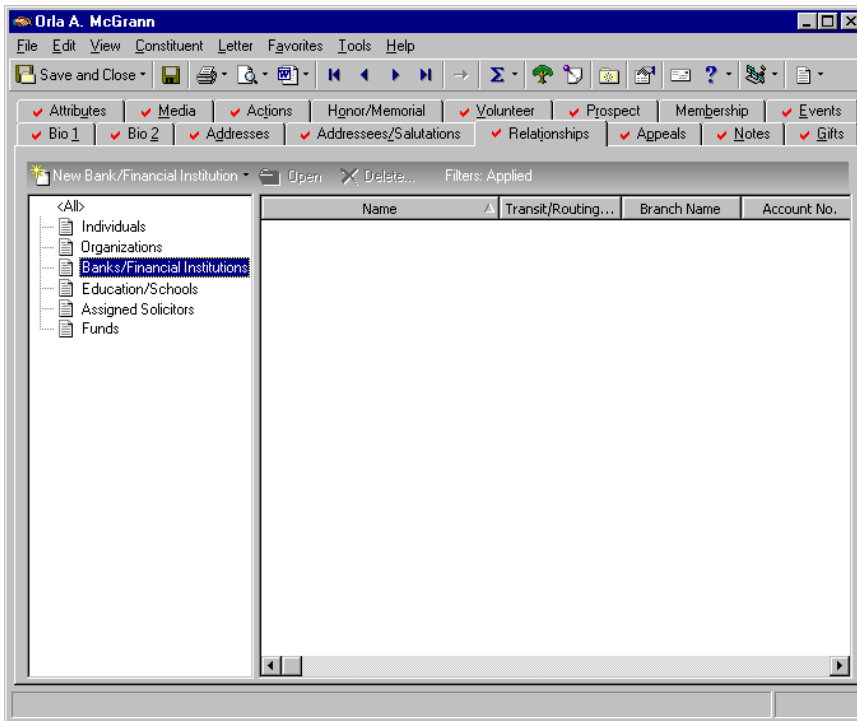
▶ **Adding a bank/financial institution relationship record from the Relationships tab**

When you add a bank relationship to a constituent record, you indicate the constituent has an affiliation with the financial institution. For example, you can track the bank where a constituent has a checking or savings account.

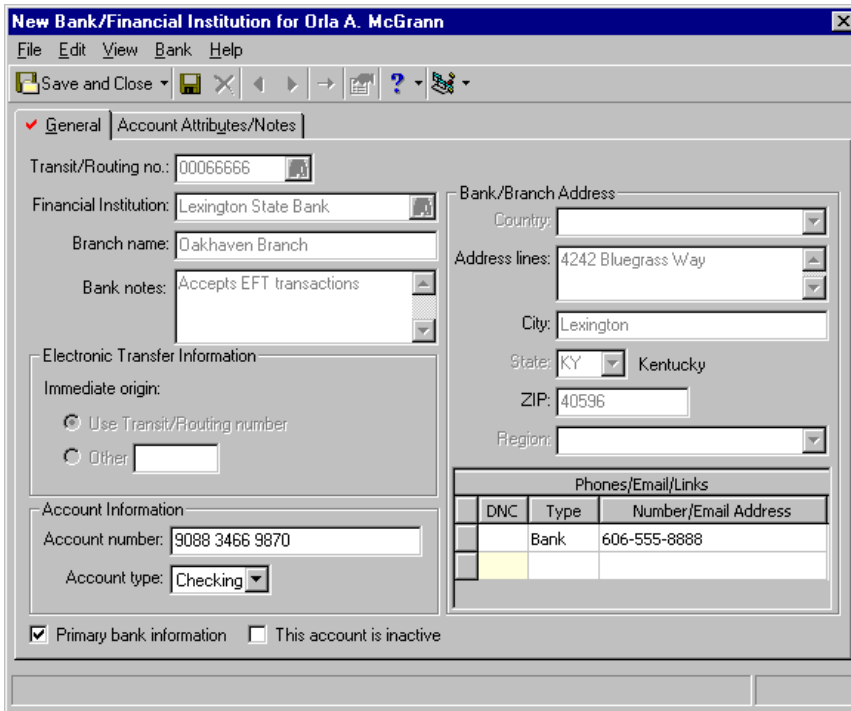
**Scenario:** To pay a recurring gift, Orla McGrann has funds transferred electronically to your organization from her checking account at Lexington State Bank. To make this possible, you must track Orla’s banking information. On the Relationships tab of her constituent record, add a new bank relationship.

**Note:** From the right-click menu, you can print the contents of the grid on the Relationships tab. You can also export the information to *Excel* or another application.

1. From Orla McGrann’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Banks/Financial Institutions**.
3. On the action bar above the tree view, click **New Bank/Financial Institution**. The New Bank/Financial Institution screen appears.



4. Select the General tab.

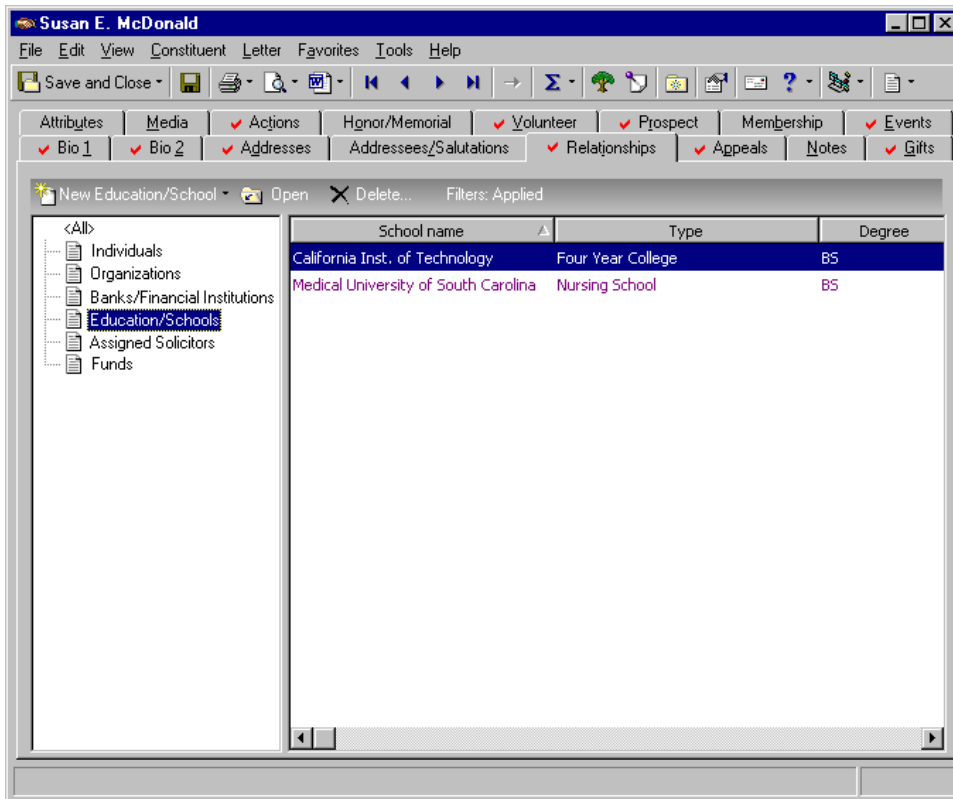
5. In the **Financial Institution** field, click the binoculars to search your database for Lexington State Bank. Once you locate and select this bank, the **Transit/Routing no.** field, **Branch name** field, Address fields, **Phones/Email/Links** grid, **Bank notes** box, and **Electronic Transfer Information** frame fill in automatically. This information defaults from the bank record set up in *Configuration*.
6. Make sure the **Primary bank information** checkbox is marked to notate this is Orla’s main bank.

**Note:** You can select the Account Attributes/Notes tab to track any attributes or notes concerning the account or bank.

7. In the **Account Number** field, enter the number “9088 3466 9870”.
8. In the **Account type** field, select “Checking”.
9. On the toolbar, click **Save and Close**. You return to the Relationships tab.
10. Click **Save and Close**.

## Education/School Relationships

An education relationship is an association between a constituent and a school, college, university, or any educational institution. The relationships serve to define the educational history of a constituent. You can track an unlimited number of educational establishments, from primary schools to universities. A school relationship can have its own organization constituent record or exist solely on the individual constituent’s record. If the school is a constituent in your database, the two records are linked together and they can appear on each others’ respective Relationships tabs.



The fields available for an education relationship cover an extensive list of topics useful for maintaining an education history on a constituent. The School tab contains the fields **School name**, **Type**, and **Campus** which pertain directly to the educational institution. Also, on the School tab are fields for **Degree**, **Class of**, **GPA**, **Date entered**, **Date graduated**, **Date left**, and **Status**, which pertain to the individual student. This is traditional education data that helps you build a comprehensive educational history on a constituent. A grid exists to record numerous majors and minors for your constituents. When you use *Alumni Tracking*, you can generate various Alumni reports based on this data. For more information about alumni reports, see the *Reports Guide*.

**Education/School for Susan E. McDonald** [X]

File Edit View Education Help

Save and Close [Icons]

▼ School | Attributes/Notes

School name: Medical University of South Carolina [v]  Primary alumni information

School type: Nursing School [v]

Campus: Downtown

Known name: O'Hare Frat/Sorority: [ ]

Degree: BS [v]

GPA: 4.00

Class of: 1988

Date entered: 09/02/1985 [Calendar]

Date graduated: 05/07/1988 [Calendar]

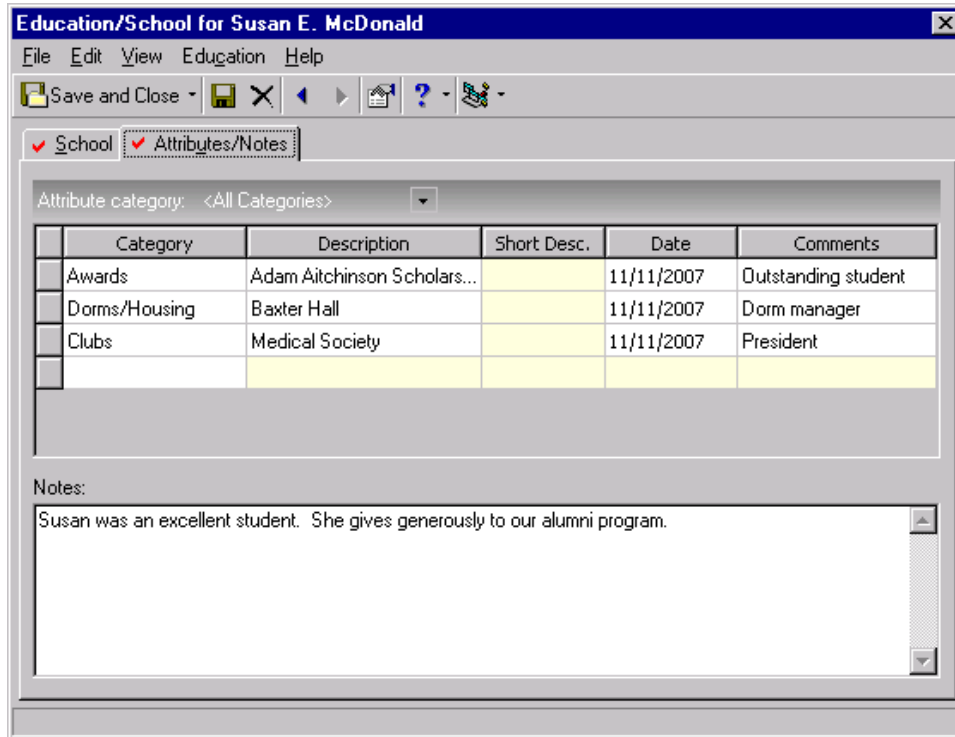
Date left: [Calendar]

Status: Graduated [v]

Major	Comments
Nursing	Top Honors

Minor	Comments
Diet and Nutrition	

Use the Attributes/Notes tab to track miscellaneous information about the student or education relationship. If the student is an athlete, a club member, or has special interests, add them here as an attribute or note. For more information about attributes, see “Attributes” on page 176. For more information about notes, see “Notes” on page 179.



► **Adding an education/school relationship record from the Relationships tab**

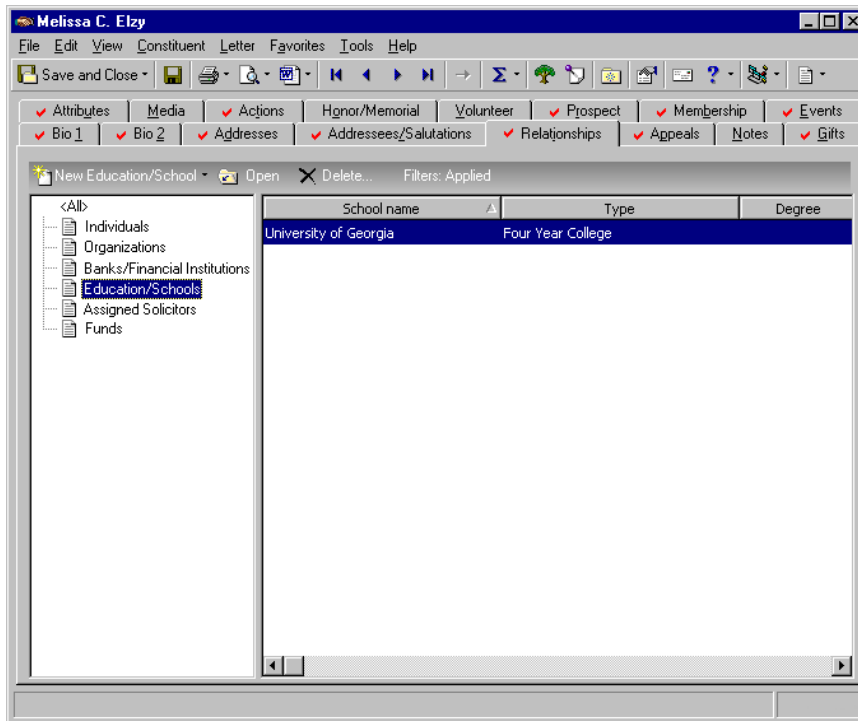
When you add an education relationship to a constituent record, you indicate the constituent has an affiliation with the educational organization. For example, you can track the university where a constituent received a Bachelor of Arts degree or the college where a constituent attended Spanish classes.

**Scenario:** Melissa Elzy is a major donor prospect. She returns a personal information card that includes her educational information. Add the education information to her constituent record as a new education/school relationship. Enter the school name, type, fraternity, degree, GPA, date graduated, major, and attribute information.

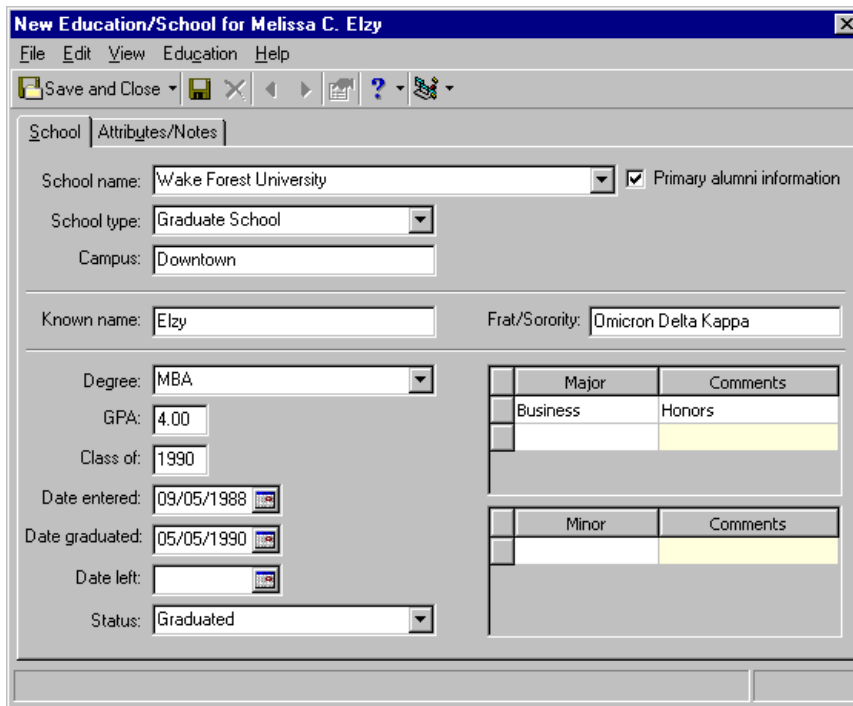
**Note:** From the right-click menu, you can print the contents of the grid on the Relationships tab. You can also export the information to *Excel* or another application.



1. From Melissa Elzy's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



2. From the tree view on the left, select **Education/Schools**.
3. On the action bar above the tree view, click **New Education/School**. The New Education/School screen appears.



4. Select the School tab.

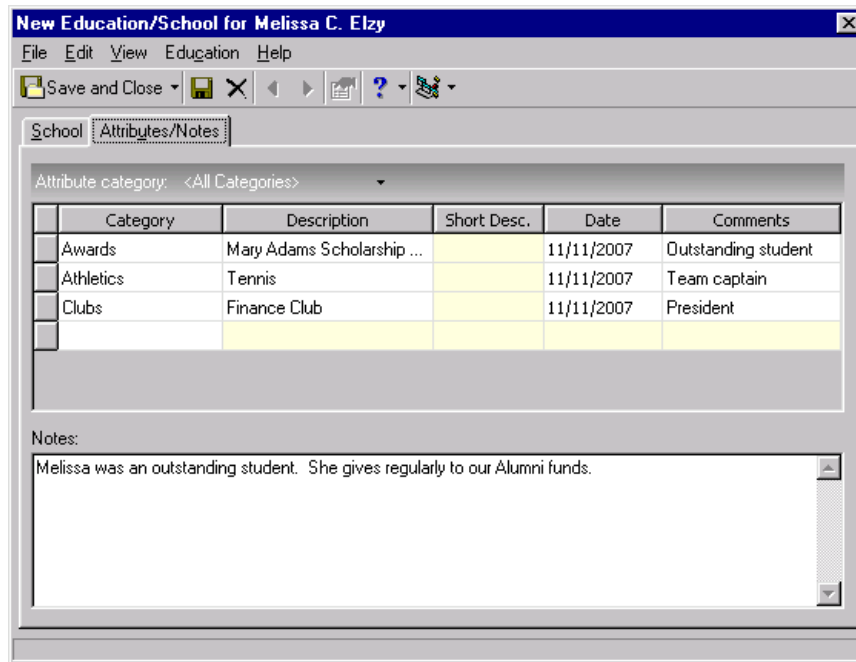
**Note:** To be able to search your database for a constituent using the name you enter in the **Known name** field, you should enter only a last name. A business rule can be set up that automatically places the last name you enter here in the Aliases grid, accessed from the **Aliases** button on the Bio 1 tab of the constituent record. When you search for a constituent, you can mark the **Check aliases** checkbox on the Open screen to ensure the **Known name** is included in your search. For more information about business rules, see the *Configuration & Security Guide*.

5. In the **School name** field, select “Wake Forest University”. This is the name of the institution.
6. Mark the **Primary alumni information** checkbox. This notates this is Melissa’s main education record.
7. In the **Type** field, select “Graduate School”.
8. In the **Campus** field, enter “Downtown”. Wake Forest University has a Downtown campus and a West Side campus.
9. In the **Known name** field, enter “Elzy”. This was the name Melissa was known by in college.
10. In the **Frat/Sorority** field, enter “Omicron Delta Kappa”. This is the name of the fraternity Melissa belonged to.
11. In the **Degree** field, select “MBA”. Melissa earned a Master of Business Administration degree.
12. In the **GPA** field, enter “4.00”.
13. In the **Class of** field, enter “1990”. This is the year her class graduated.
14. In the **Date entered** field, enter the date 09/05/1988. This is the date Melissa started at Wake Forest.

**Note:** Enter data in either the **Date graduated** or **Date left** field, not both. If the constituent left the school without graduating, enter the date in the **Date left** field. Otherwise, enter her graduation date in the **Date graduated** field.

15. In the **Date graduated** field, enter the date 05/05/1990. This is the date she graduated. If Melissa had left the university before graduating, you would enter a date in the **Date left** field.
16. In the **Status** field, select “Graduated”.
17. In the **Major** column of the Majors grid, select “Business”. In the **Comments** column, enter “Honors”. Melissa was an honor student.
18. If a constituent also obtained a minor degree, enter the subject in the **Minor** column of the Minors grid. You can also enter any **Comments** you have concerning the minor.

19. Select the Attributes/Notes tab.



Attribute category: <All Categories>

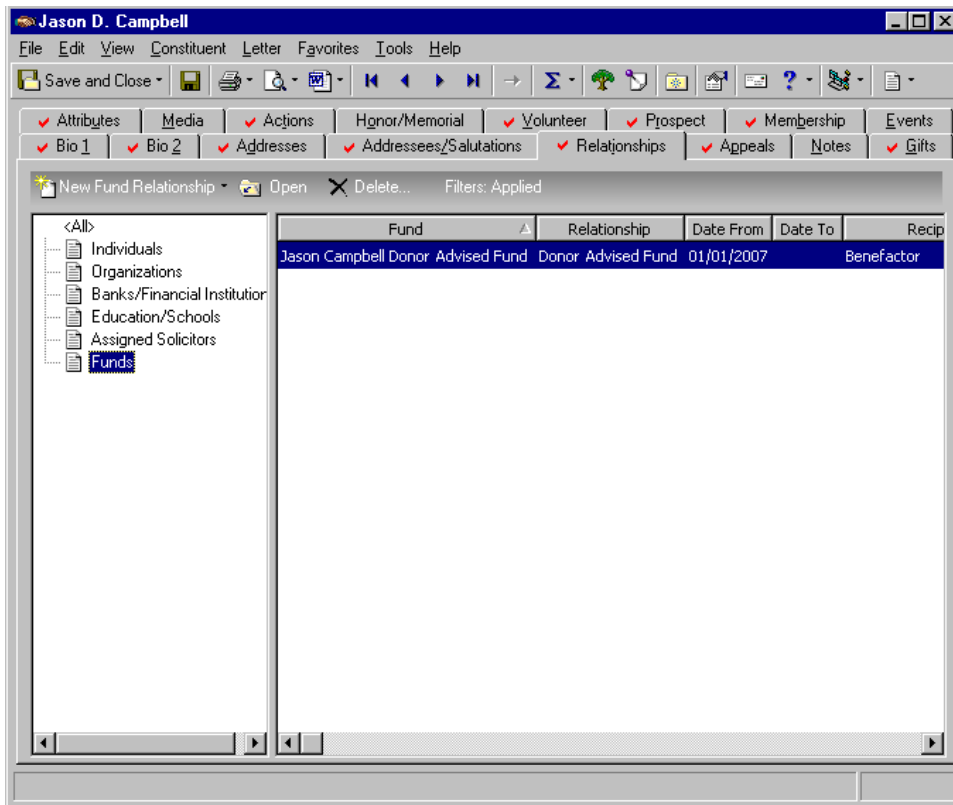
Category	Description	Short Desc.	Date	Comments
Awards	Mary Adams Scholarship ...		11/11/2007	Outstanding student
Athletics	Tennis		11/11/2007	Team captain
Clubs	Finance Club		11/11/2007	President

Notes:  
Melissa was an outstanding student. She gives regularly to our Alumni funds.

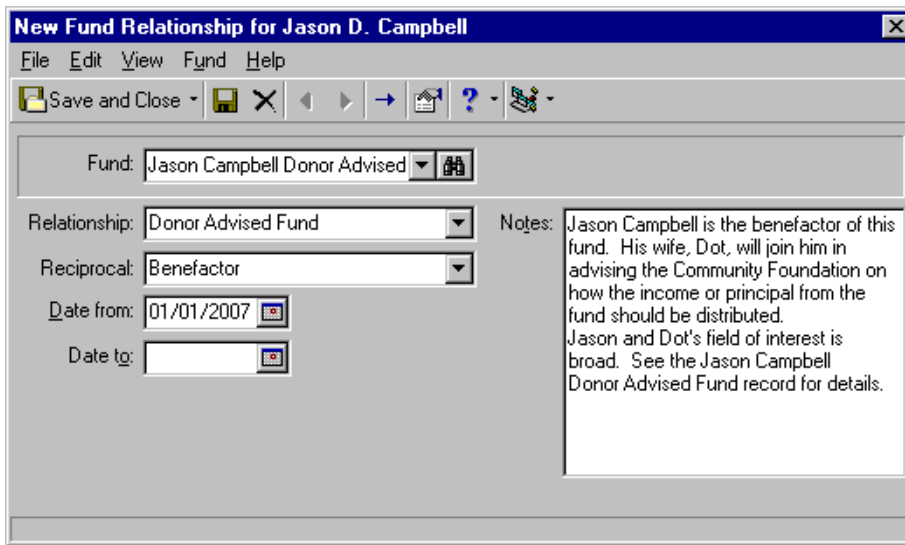
20. In the first row of the **Category** column, select "Awards".
21. On the same row, in the **Description** column enter "Mary Adams Scholarship Award".
22. Enter the date you add the attribute.
23. In the **Comments** column, enter "Outstanding student".
24. Continue to add as many attributes as necessary.
25. In the **Notes** box, enter "Melissa was an outstanding student. She gives regularly to our Alumni funds."
26. On the toolbar, click **Save and Close**. You return to the Relationships tab of Melissa's constituent record.
27. Click **Save and Close**.

# Fund Relationships

You can track fund relationships on the Relationships tab of an individual or organization constituent record. Fund relationships are the funds to which a constituent has a special affiliation.



For example, your organization is a community foundation. Jason Campbell requests you set up a donor advised fund in his name. This fund will help him simplify his charitable donations to a wide range of philanthropic causes he deems important and help him better manage his tax liability. After you set up the donor advised fund record (from the Funds page of *Records*), on the Relationships tab of Jason's constituent record, you must add a new fund relationship. The fund's name may be Jason Campbell Donor Advised Fund. The fund's relationship to Jason is Donor Advised Fund and Jason's relationship to the fund is Benefactor. In the date fields, you track when the fund relationship starts and when the fund relationship ends (if applicable). In the **Notes** box, you can add any notes you deem important to the relationship. Perhaps, you want to notate that Jason and his wife are both going to advise the foundation on how the income and principal for the fund should be distributed.



Once you save the fund relationship record, it appears automatically as an individual relationship record on the Relationships tab of the Jason Campbell Donor Advised Fund record, linking the two together. By establishing this relationship, you can quickly see who initiated the fund and the relationship's pertinent information by viewing the fund relationship on the Relationships tab of either the constituent or fund record.

**Tip:** You can quickly report on constituents and funds by running a constituent or fund profile. For more information about profiles, see the *Reports Guide*.

In addition, fund relationships can help you quickly answer questions about funds with which constituents are involved. When Jason phones to ask questions about his donor advised fund, for example, because you established reciprocated relationships, you can open the constituent record, go to the Relationships tab, open the fund relationship record and quickly scan your notes. From the menu bar, you can select **Fund, Go to Jason Campbell Donor Advised Fund** and go straight to the associated fund record. On the Relationships tab of the fund record, you can confirm you do indeed have the correct constituent and continue to view other tabs (General, Solicitors, Campaigns, Appeals, GL Distributions, Attributes) to answer multiple questions for your constituent without having to call the business office, accountant, or anyone else at your organization.

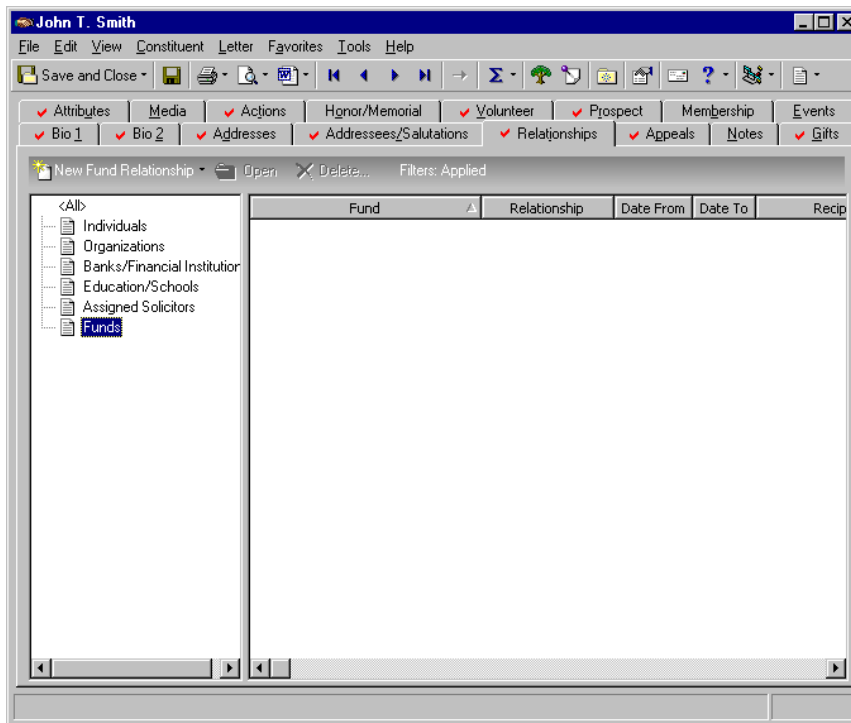
For more information about fund records, see the Funds section of the *Campaigns, Funds, & Appeals Data Entry Guide*.

▶ **Adding a fund relationship record from the Relationships tab**

When you add a fund relationship to a constituent record, you indicate the constituent has an affiliation with the fund.

**Scenario:** John Smith gives a sizeable donation to your organization to establish a scholarship fund in memory of his lifelong friend, Wallace Brown. John requests the fund be used to provide a yearly scholarship to one or more citizens from his and Wallace’s hometown. You added the Wallace Brown Memorial Scholarship Fund to your database. Now, add a fund relationship from the Relationships tab of John’s constituent record to notate that he is the fund’s benefactor, the date he initiated the fund, and the important points to remember about the relationship.

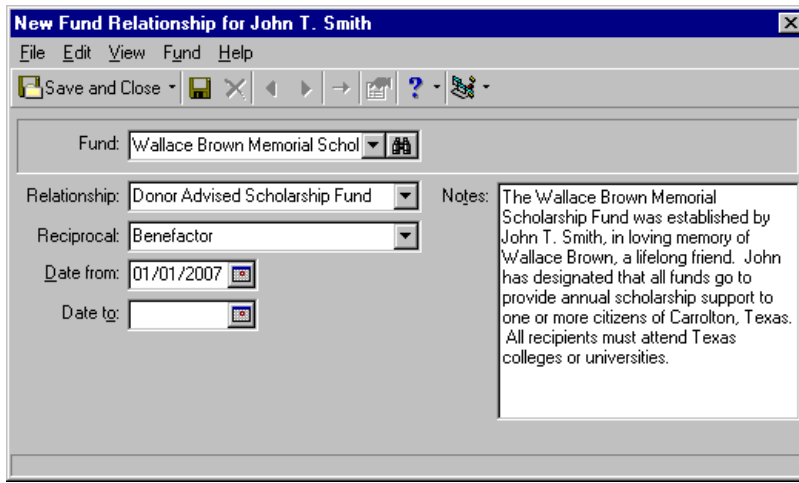
1. From John Smith’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Funds**.

**Note:** You can go directly from a Fund Relationship screen, (accessed from the Relationships tab of a constituent record), to the associated fund record. Select **Fund, Go to [fund name]** from the menu bar.

3. On the action bar above the tree view, click **New Fund Relationship**. The New Fund Relationship screen appears.



4. In the **Fund** field, select “Wallace Brown Memorial Scholarship Fund”. You can click the binoculars to search your database for the fund. This is the fund to which John has a special affiliation. He set up the fund in memory of his friend Wallace Brown, and he will advise your organization on the fund distribution.
5. In the **Relationship** field, select “Donor Advised Scholarship Fund”. This is the fund’s relationship to John.
6. In the **Reciprocal** field, select “Benefactor” or “Patron”. This is John’s relationship to the fund.
7. In the **Date from** field, enter the date John initiated the fund. This is the date the relationship between the fund and John began.
8. You can leave the **Date to** field blank. John did not designate an end date for the fund, so the fund relationship has no determined end date. If the relationship between the fund and John was for a predetermined period of time, you would enter a date in the **Date to** field. For example, if John requested the fund exist only for five years, the relationship may only last five years.
9. In the **Notes** box, enter “The Wallace Brown Memorial Scholarship Fund was established by John T. Smith, in loving memory of Wallace Brown, a lifelong friend. John has designated that all funds go to provide annual scholarship support to one or more citizens of Carrollton, Texas. All recipients must attend Texas colleges or universities.”
10. On the toolbar, click **Save and Close**. You return to the Relationships tab of John’s constituent record.

Once you save and close the record, the relationship is reciprocated automatically on the fund record. John appears as an individual relationship on the Relationships tab of the fund record. For more information about fund records, see the Funds section of the *Campaigns, Funds, & Appeals Data Entry Guide*.

## Copying and Linking Relationship Addresses

To help eliminate data entry errors, you can copy or copy and link an address from one constituent record to another or from a constituent record to a relationship record. When you copy an address, you are simply pasting in a separate copy of the address directly from the original record. Changes to the address on the original record are not made to the copy, and vice versa.

When you copy and link (share) an address, you are inserting a copy of the address that is still tied to the original address. Changes you make to the address on either record can be made automatically to the other record. When you change a linked (shared) address, a message appears letting you know the address is shared and gives you the option to change the address on only the record in which you are working, or on all shared records.

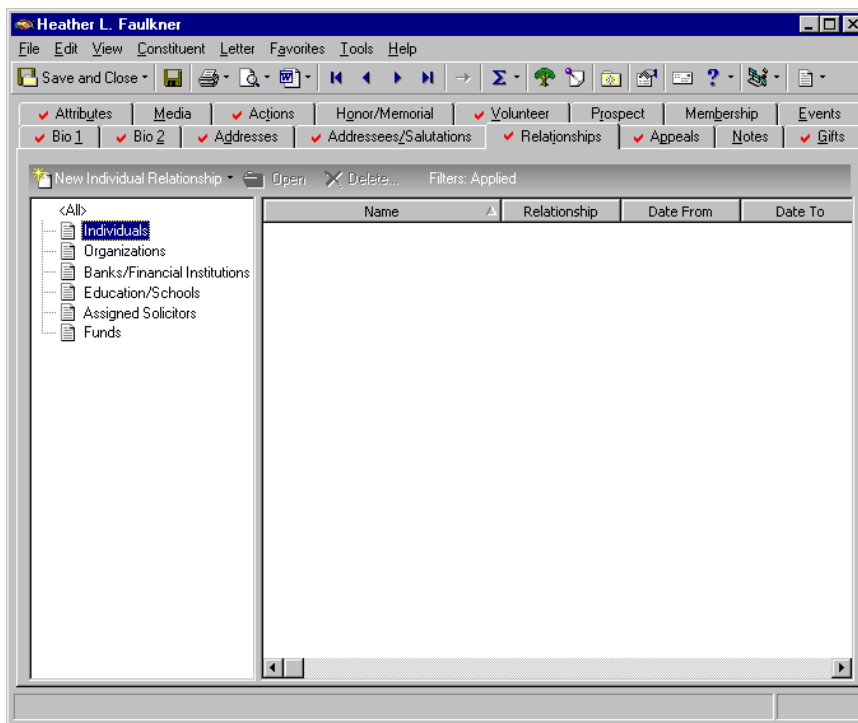
When you copy and link (share) an address, phone numbers from the original constituent record are shared and appear on the record to which you copied depending on whether in *Configuration*, you allowed that phone type to be shared. For more information about shared phone numbers, see “Phone Sharing” on page 157. For more information about phone type tables in *Configuration*, see the *Configuration & Security Guide*.

▶ **Copying a constituent address to a relationship record from the Relationships tab**

When you add or edit a relationship record, you can copy an address from a constituent record to the relationship record. When you copy an address, you are pasting in a separate copy of the address directly from the original record. Changes to the address on the original record are not made to the copy and vice versa. Copying an address saves time and eliminates data entry errors. This procedure uses an individual relationship record, but you can copy an address to an organization relationship record, also.

**Scenario:** Heather Faulkner is a student at Rice College. This semester, her sister, Emma, starts as a freshman. The two girls plan to live together. Add Emma to the Relationships tab of Heather’s constituent record, and copy Heather’s school address to Emma’s relationship record. If you have not added a relationship record from the Relationships tab of Heather’s constituent record, see “Adding an individual relationship record from the Relationships tab” on page 120.

1. From Heather Faulkner’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Individuals**.



- On the action bar above the tree view, click **New Individual Relationship**. The New Individual Relationship screen appears. For more information about adding a new relationship, see “Managing Relationships” on page 114.

The screenshot shows the 'New Individual Relationship for Heather L. Faulkner' dialog box. The 'General 1' tab is selected, showing the following fields and options:

- Biographical:**
  - Last name: Faulkner
  - First name: Emma
  - Middle name: Layne
  - Titles: Ms.
  - Suffixes: (empty)
  - Nickname: (empty)
  - Maiden name: (empty)
  - ID: (empty)
  - Buttons: Business, Education
- Address - Home:**
  - Country: United States
  - Address lines: (empty)
  - City: (empty)
  - State: (empty)
  - ZIP: (empty)
  - DPC: (empty)
- Phones/Email/Links:**

DNC	Type	Number/Email A...	Shared?
- Relationship:** (empty dropdown)
- Reciprocal:** (empty dropdown)
- Date from:** (empty date picker) to (empty date picker)

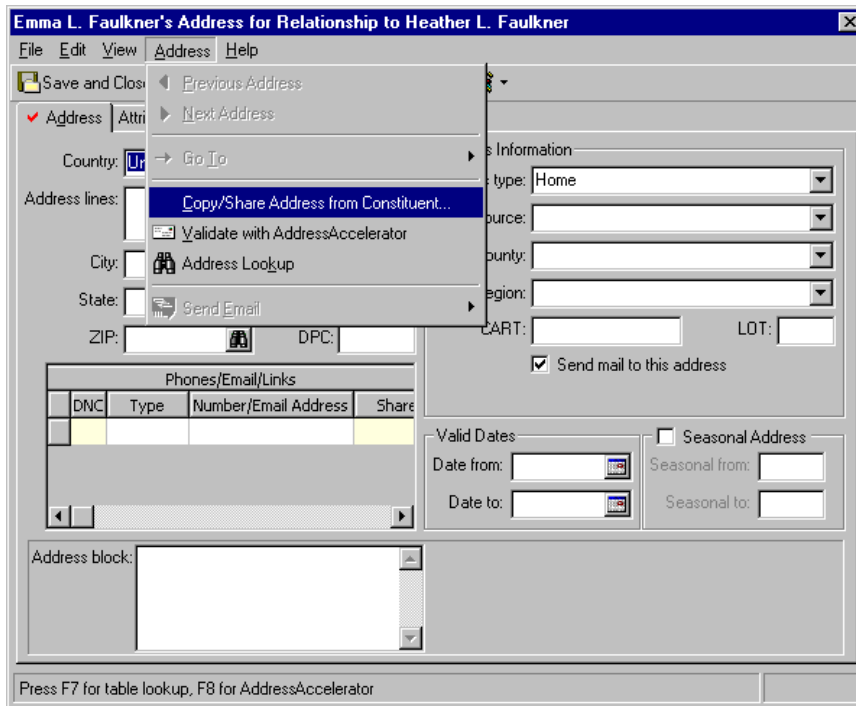
- In the **Last name** field, enter “Faulkner”; in the **First name** field, enter “Emma”; and in the **Middle name** field, enter “Layne”.
- In the first **Titles** field, enter “Ms.”

**Warning:** For data entry consistency, we recommend you click **More** and add your address information in the appropriate fields on the Address screen.

- On the **General 1** tab, click **More**. The Address for Relationship screen appears.

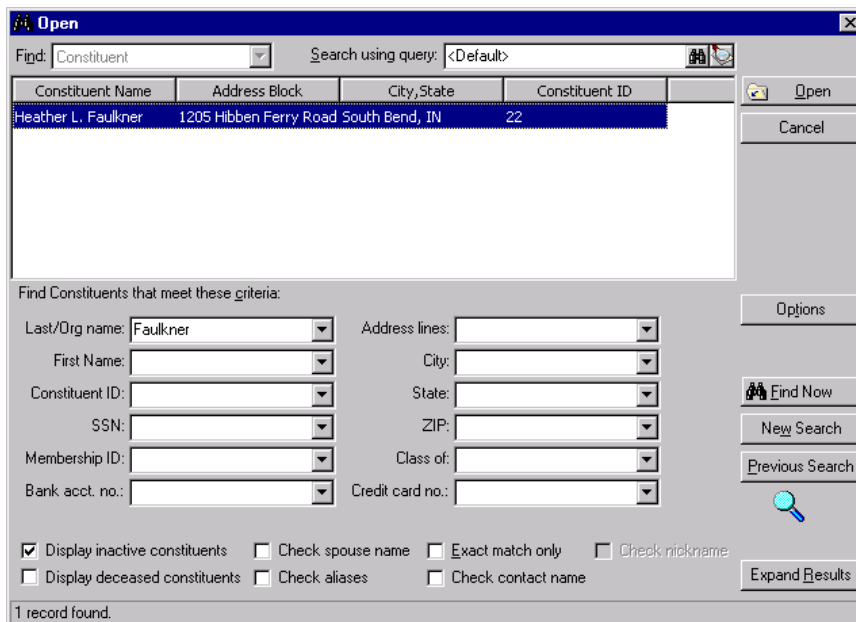
**Note:** You can also select **Relationship, Copy/Share Address from Constituent** from the menu bar of the Relationship screen.

- From the menu bar, select **Address, Copy/Share Address from Constituent**.

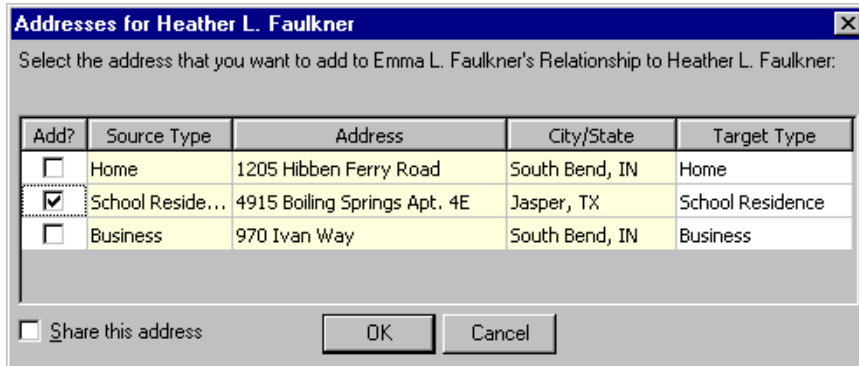


The Open screen appears, so you can search for the constituent record from which you want to copy the address.

- In the **Last/Org name** field, enter "Faulkner".
- Click **Find Now**. Heather Faulkner appears in the grid.



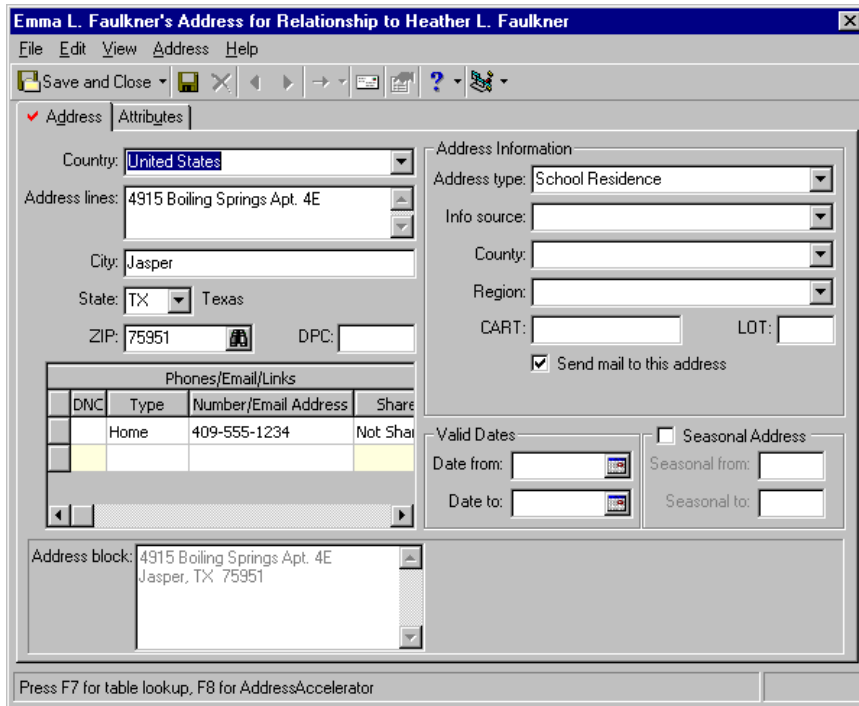
10. Select Heather Faulkner’s record in the grid and click **Open**. The Addresses for screen appears.



11. To copy Heather’s school address to Emma’s individual relationship record, mark the checkbox next to the School address in the **Add** column.
12. Unmark the **Share this address** checkbox. You do not want to share the address, you merely want to copy it.

**Note:** On the Address screen, you can also enter additional address information for the relationship. For more information about addresses, see “Addresses” on page 86.

13. Click **OK**. You return to the Address for Relationship screen. Heather’s school address and phone/email information is now copied onto Emma’s individual relationship record.



14. On the toolbar, click **Save and Close**. You return to the Individual Relationship screen for Heather Faulkner.
15. Add additional relationship information, such as **Relationship** of Sister and **Reciprocal** of Sister.
16. On the toolbar, click **Save and Close**. You return to the Relationships tab of Heather’s constituent record.

**Tip:** You can use shortcut keys to move around *The Raiser’s Edge* without using your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

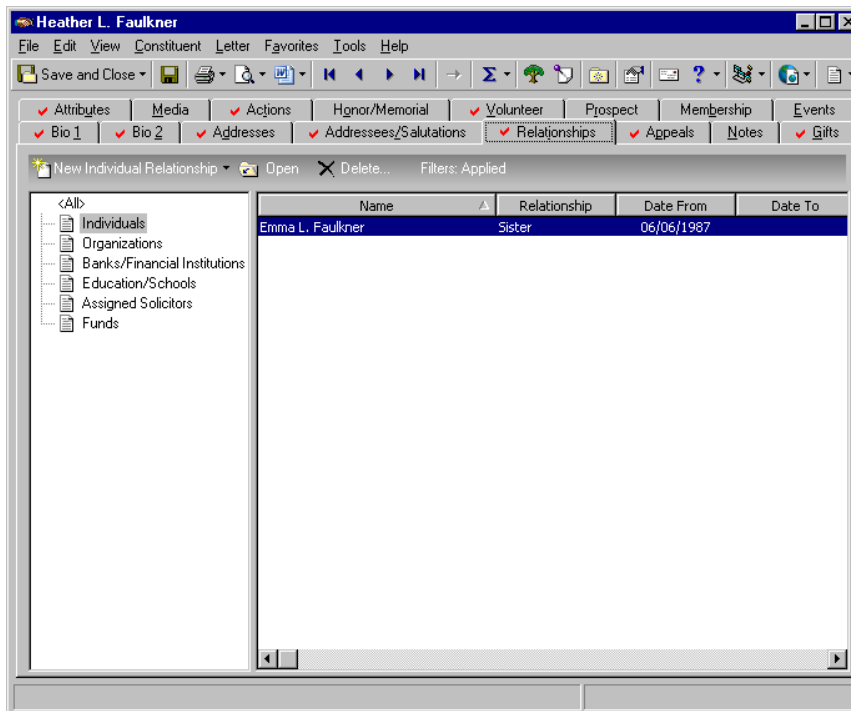
17. Click **Save and Close**.

▶ **Linking a constituent address to a relationship record from the Relationships tab**

When you add or edit an individual or organization relationship record, you can link the address to another constituent record. When you link an address, you are inserting a copy of the address which is still tied to the original address. Changes you make to the address on either record can be automatically made on the other record.

**Scenario:** You previously added an address for Emma Faulkner, the sister of one of your constituents, Heather Faulkner. You plan to solicit Emma as a potential donor, but currently her record resides only on the Relationships tab of Heather’s constituent record. To ensure accuracy in mailings, link Heather’s and Emma’s school addresses from the Relationships tab of Heather’s record. This will ensure that any changes made to one address will also change on the other. If you have not added Emma as a relationship for Heather, or copied Heather’s address to Emma’s relationship record, see “Adding an individual relationship record from the Relationships tab” on page 120 and “Copying a constituent address to a relationship record from the Relationships tab” on page 147.

1. From Heather Faulkner’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Individuals**.

3. Select the individual relationship record for Emma Faulkner and click **Open** on the action bar. The Individual Relationship screen appears.

**Individual Relationship for Heather L. Faulkner**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

**Biographical**

Last name: Faulkner Aliases

First name: Emma

Middle name: Layne

Titles: Ms.

Suffixes:

Nickname:

Maiden name:

ID:

Business Education

This individual is the:

Spouse

**Address - School Residence**

Country: United States More...

Address lines: 4915 Boiling Springs Apt. 4E

City: Jasper

State: TX Texas

ZIP: 75951 DPC:

Phones/Email/Links			
DNC	Type	Number/Email A...	Shared?
	Home	409-555-1234	Not Shared

Relationship: Sister

Reciprocal: Sister

Date from: 06/06/1987 to

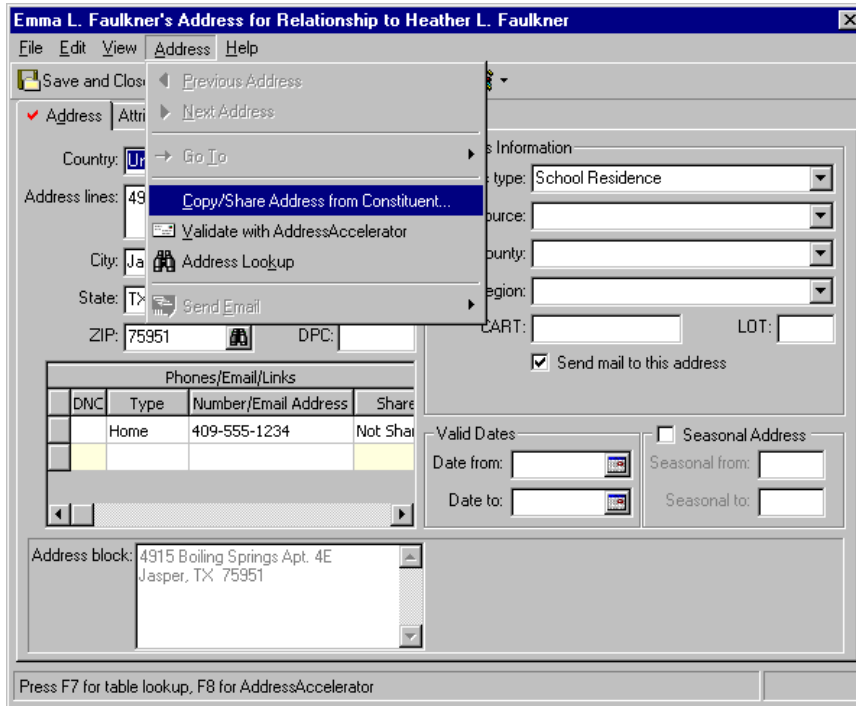
4. Select the General 1 tab.

**Warning:** For data entry consistency, we recommend you click **More** and add your address information in the appropriate fields on the Address screen.

5. Click **More**. The Address for Relationship screen appears.

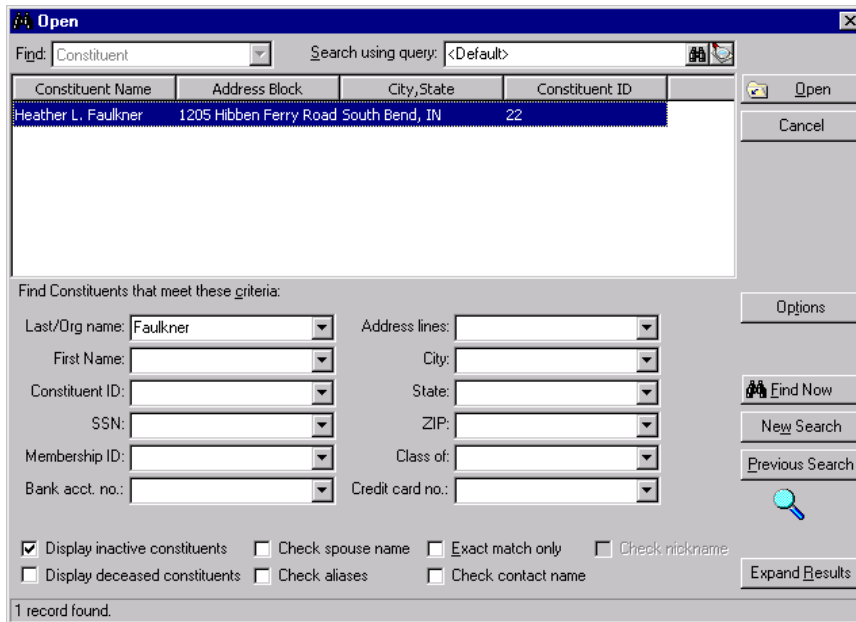
**Note:** You can also select **Relationship, Copy/Share Address from Constituent** from the menu bar of the Relationship screen.

- From the menu bar, select **Address, Copy/Share Address From Constituent**.



The Open screen appears, so you can search for the constituent record to which to link the address.

- In the **Last/Org name** field, enter "Faulkner".
- Click **Find Now**. Heather Faulkner appears in the grid.



9. Select Heather Faulkner's record in the grid and click **Open**. The Addresses for screen appears.

Addresses for Heather L. Faulkner

Select the address that you want to add to Emma L. Faulkner's Relationship to Heather L. Faulkner:

Add?	Source Type	Address	City/State	Target Type
<input type="checkbox"/>	Home	1205 Hibben Ferry Road	South Bend, IN	Home
<input checked="" type="checkbox"/>	School Reside...	4915 Boiling Springs Apt. 4E	Jasper, TX	School Residence
<input type="checkbox"/>	Business	970 Ivan Way	South Bend, IN	Business

Share this address

OK Cancel

10. To link Heather's school address to Emma's individual relationship record, mark the checkbox next to the School address line in the **Add** column and mark the **Share this address** checkbox on the bottom left of the screen.
11. Click **OK**. You return to Address for Relationship screen. Heather's school address information is now linked to Emma's individual relationship record. Changes you make to the address on either record can be made automatically to the other record. When you change the linked (shared) address, a message appears, letting you know the address is shared, and gives you the option to change the address on only the record in which you are working or on all shared records.

**Note:** A link icon appears on the **More** button once an address is linked.

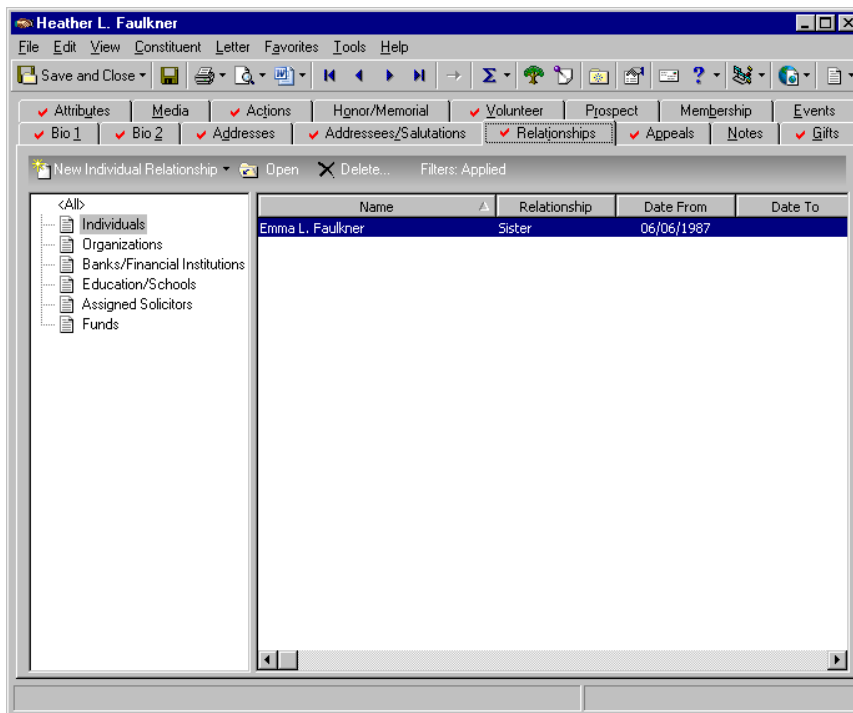
12. On the toolbar, click **Save and Close**. You return to the Individual Relationship screen for Heather Faulkner.
13. On the toolbar, click **Save and Close**. You return to the Relationships tab of Heather's constituent record.
14. Click **Save and Close**.

► **Breaking an address link between a constituent and a relationship from the Relationships tab**

When necessary, you can break the address link between a constituent and a relationship.

**Scenario:** You added an address for Emma Faulkner, the sister of one of your constituents, Heather Faulkner. You copied and linked Emma’s address to Heather’s address from the Relationships tab of Heather’s constituent record. Now, Emma decides to move out and get her own apartment. From the Relationships tab of Heather’s constituent record, break the link between her address and Emma’s. If you have not added a relationship record, or copied and linked a relationship record, see “Adding an individual relationship record from the Relationships tab” on page 120, “Copying a constituent address to a relationship record from the Relationships tab” on page 147, and “Linking a constituent address to a relationship record from the Relationships tab” on page 151.

1. From Heather Faulkner’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.





2. Select the individual relationship record for Emma Faulkner and click **Open** on the action bar. Her Individual Relationship screen appears.

**Individual Relationship for Heather L. Faulkner**

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

Biographical

Last name: Faulkner Aliases

First name: Emma

Middle name: Layne

Titles: Ms.

Suffixes:

Nickname:

Maiden name:

ID:

Business Education

Address - School Residence

Country: United States More...

Address lines: 4915 Boiling Springs Apt. 4E

City: Jasper

State: TX Texas

ZIP: 75951 DPC:

Phones/Email/Links			
DNC	Type	Number/Email A...	Shared?
	Home	409-555-1234	Shared

This individual is the:

Spouse

Relationship: Sister

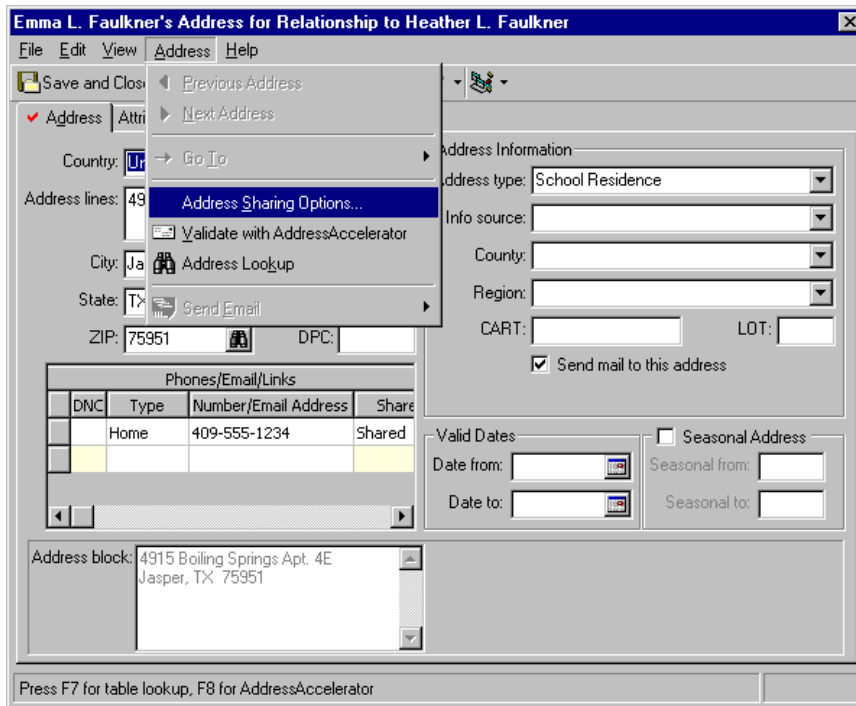
Reciprocal: Sister

Date from: 06/06/1987 to

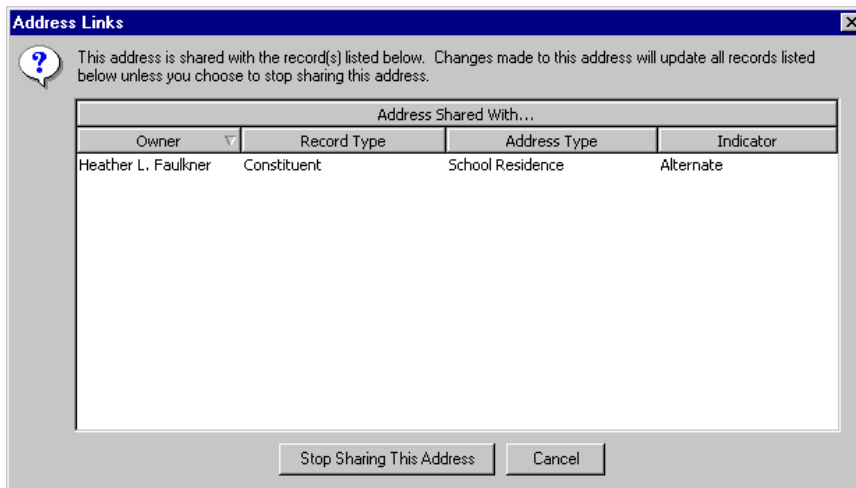
3. Select the General 1 tab.
4. Click **More**. The Address for Relationship screen appears.

**Note:** You can also select **Relationship, Address Sharing Options** from the menu bar of the Relationship screen.

- From the menu bar, select **Address, Address Sharing Options**.



The Address Links screen appears, showing the records that share this address.



- Click **Stop Sharing This Address**. You return to the Address screen. The link is broken.
- On the toolbar, click **Save and Close**. You return to the Individual Relationship record for Heather.
- Click **Save and Close**. You return to the Relationships tab of Heather's constituent record.
- Click **Save and Close**.

## Phone Sharing

When you copy and link (share) an address from one constituent record to another, or from a constituent record to a relationship record, numbers in the **Phones/Email/Links** grid are also shared.

From **Tables**, in *Configuration*, you must set up which phone types can be shared. From the Phone Types table list, you must open each phone type and determine if that particular phone type should be shared. For example, you may decide to share all Home phone types and never share cell phones or email addresses. On each Edit Phone Types screen, to allow a phone type to be shared, leave the **Do not share phones of this type** checkbox unmarked. Mark the checkbox and that particular phone type cannot be shared.

## Phone Sharing Rules

When you link (share) addresses, certain rules determine whether phone numbers are shared.

- In *Configuration*, when you mark the **Do not share phones of this type** checkbox, Cannot be Shared appears on records in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type, and the field is locked.
- In *Configuration*, when you unmark the **Do not share phones of this type** checkbox, Not Shared, Do Not Share, and Shared appear as selections in the drop-down list of the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type. Not Shared appears as the default until you change the status of a particular phone number.
- On records, the phone type (according to what you set up in *Configuration*) determines whether the phone number or email address can be shared. You can select Do Not Share in the **Shared** column in the **Phones/Email/Links** grid when you want a particular number to not be shared.
- When you copy and link (share) an address, all phone numbers designated as Shared in the **Shared** column of the **Phones/Email/Links** grid on the record from which you copy (source record) are copied and shared. All numbers designated as Not Shared change to Shared.
- When you add a phone number that is a duplicate type on a shared address record, the existing number on the shared address record is overwritten.
- You can unlink a phone number at any time by changing the value of Shared in the **Shared** column of the **Phones/Email/Links** grid to Not Shared or Do Not Share.
- If an address is linked and you add a new phone number which is shareable (determined in *Configuration*), the number is automatically shared on all linked addresses.
- On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Not Shared status in the **Shared** column to Shared, the phone number is added to all shared address records.
- On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Shared status in the **Shared** column to Not Shared, the link for the phone number is broken only for that address record.
- When you break the link between shared addresses, all shared phone numbers change to Not Shared.
- If, in *Configuration*, you change a shareable phone type (**Do not share phones of this type** checkbox is unmarked) to not shareable (**Do not share phones of this type** checkbox is marked), all links for that phone type on all shared addresses are broken. The status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Shared or Not Shared to Cannot be Shared.

- If, in *Configuration*, you change a not shareable phone type (**Do not share phones of this type** checkbox is marked) to shareable (**Do not share phones of this type** checkbox is unmarked), the status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Cannot be Shared to Not Shared.

## Editing and Deleting Relationships

**Warning:** Instead of permanently deleting a relationship from your database, you can use the **Date to** (ending date) field on the relationship record. This date indicates the relationship is not current and lets you retain a record of the relationship in your database for historic purposes.

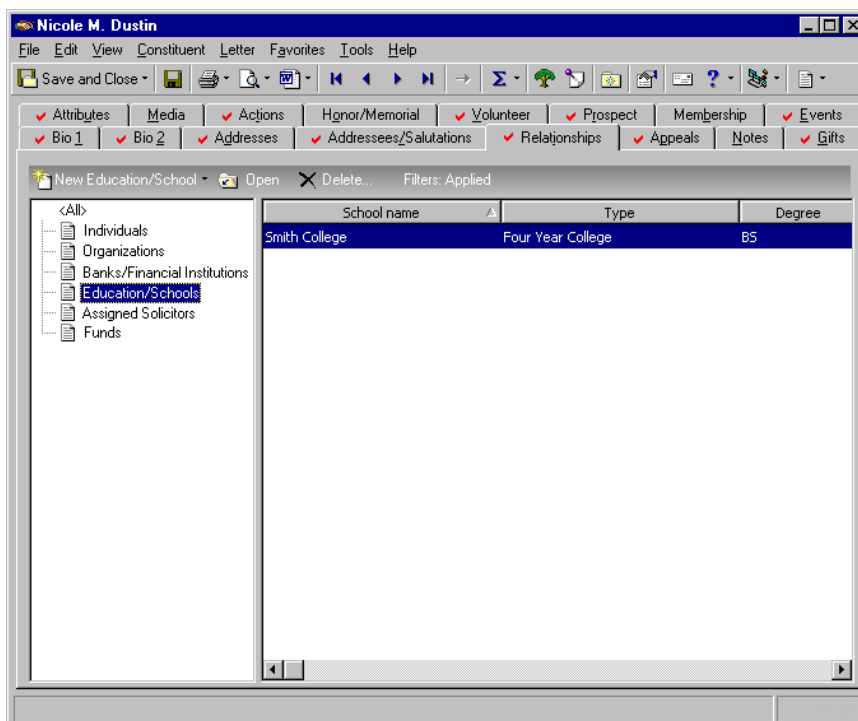
After you add a constituent’s relationships to your database, you can edit or delete a relationship record from the Relationships tab of the constituent record. For example, you add a bank relationship for Mark Adamson and later realize you entered the wrong account number. You can go to the Relationships tab of Mark’s constituent record, open the relationship record and change the incorrect number. Or, perhaps you add the church Mark attends, but two years later, Mark informs you he is no longer a member of that particular church. You can delete the organization relationship entirely. Always keep in mind, when deleting any record in *The Raiser’s Edge*, the deletion is permanent.

### ▶ Editing a relationship record from the Relationships tab

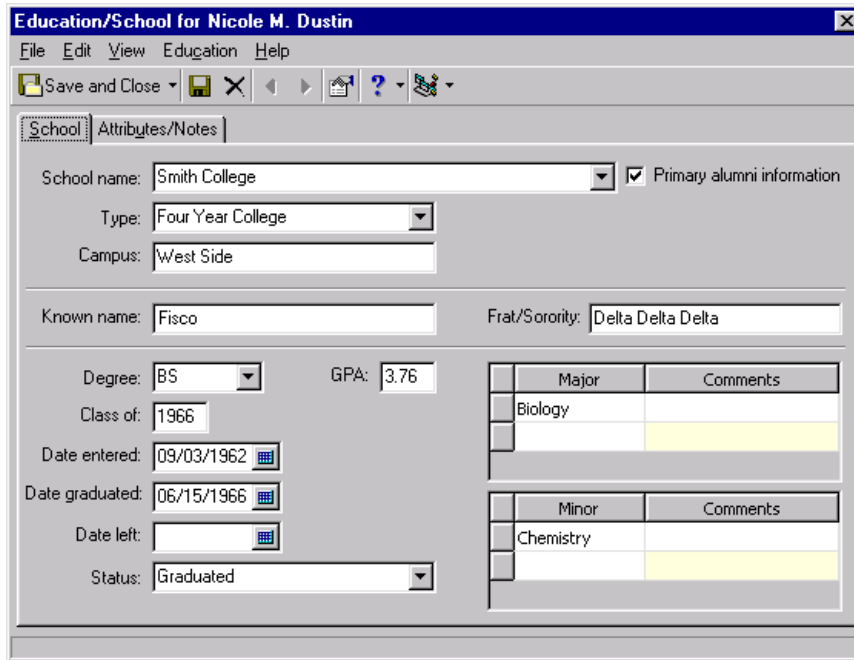
Once a relationship is in your database, you can use the Relationships tab to access the relationship and make changes.

**Scenario:** You receive a call from Nicole Dustin concerning incorrect education data. She informs you her graduating “class of” year was wrong on a recent alumni mailing. She graduated in 1967, not 1966. Correct this date on the Relationships tab of her constituent record.

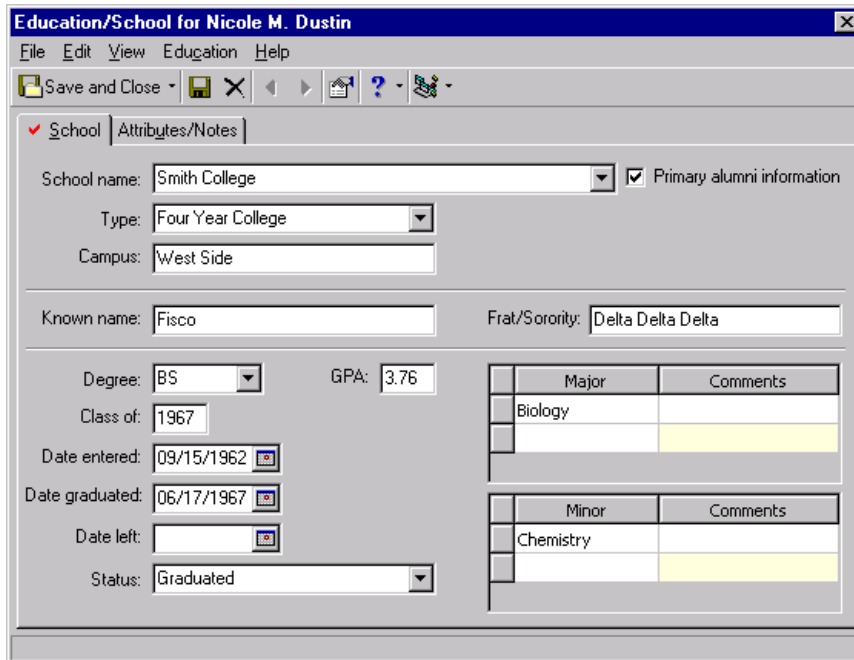
1. From Nicole Dustin’s constituent record, select the Relationships tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



2. From the tree view on the left, select **Education/Schools**.
3. Select the education record for Smith College and click **Open** on the action bar. The Education/School screen appears.



4. In the **Class of** field, change the date from 1966 to 1967.
5. In the **Date graduated** field, change the date to 06/17/1967.



6. On the toolbar, click **Save and Close**. You return to the Relationships tab of Nicole’s constituent record.
7. Click **Save and Close**.

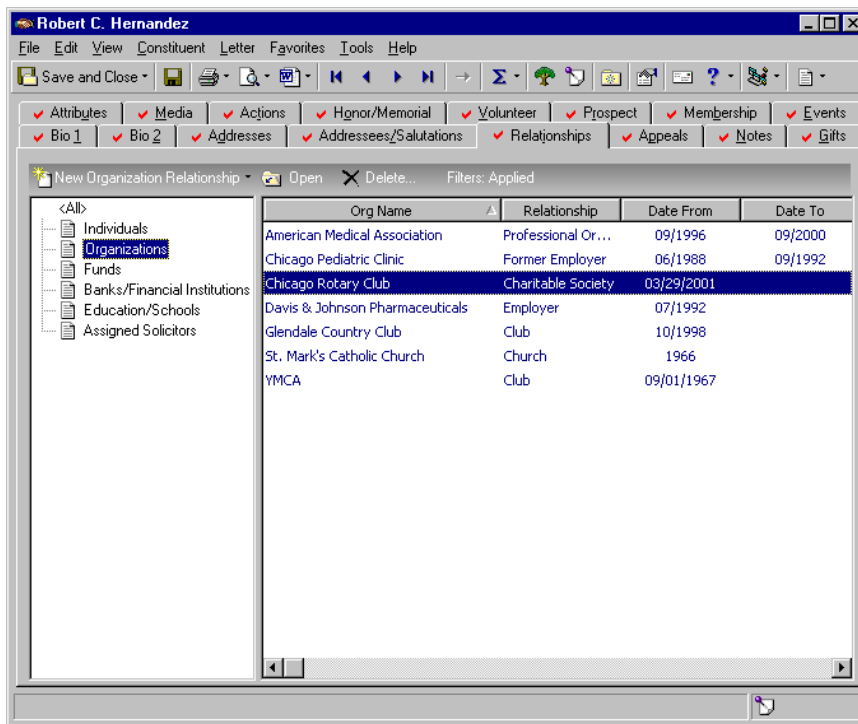
▶ **Deleting a relationship record from the Relationships tab**

**Warning:** Before you delete a relationship, or any record in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

You can delete a relationship from your database if it is no longer valid. Instead of deleting the relationship, we recommend you use the **Date to** (ending date) field to indicate the relationship is not current. This way the relationship record remains in your database for historic purposes.

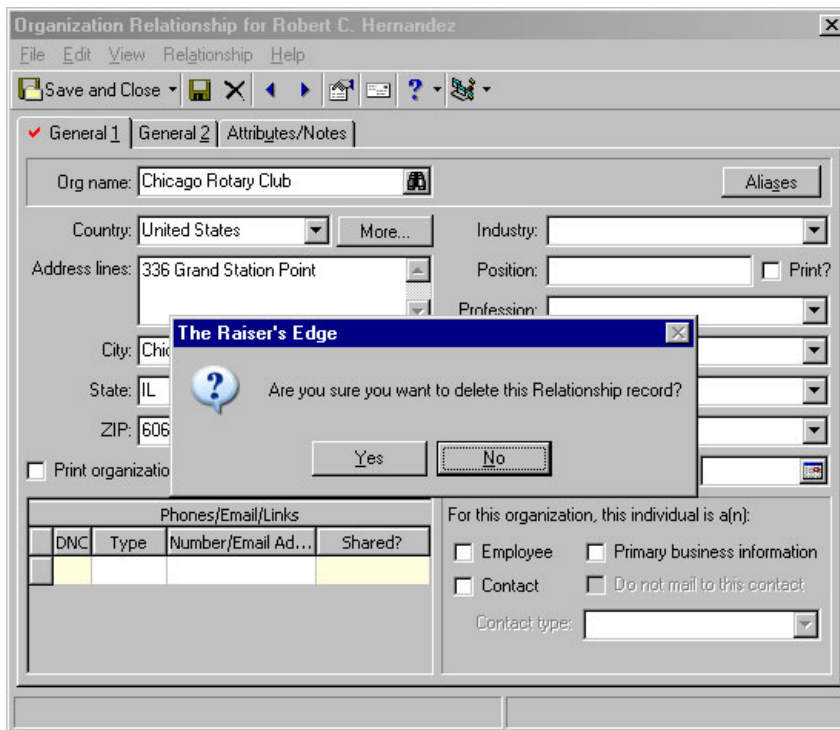
**Scenario:** Robert Hernandez informs you he is no longer a member of the Chicago Rotary Club. From Robert's constituent record, delete this organization from the Relationships tab.

1. From Robert Hernandez's constituent record, select the Relationships tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



2. From the tree view on the left, select **Organizations**.

3. Select the relationship record for Chicago Rotary Club and click **Delete** on the action bar. The relationship record opens and a message appears, asking if you are sure you want to delete the relationship record.

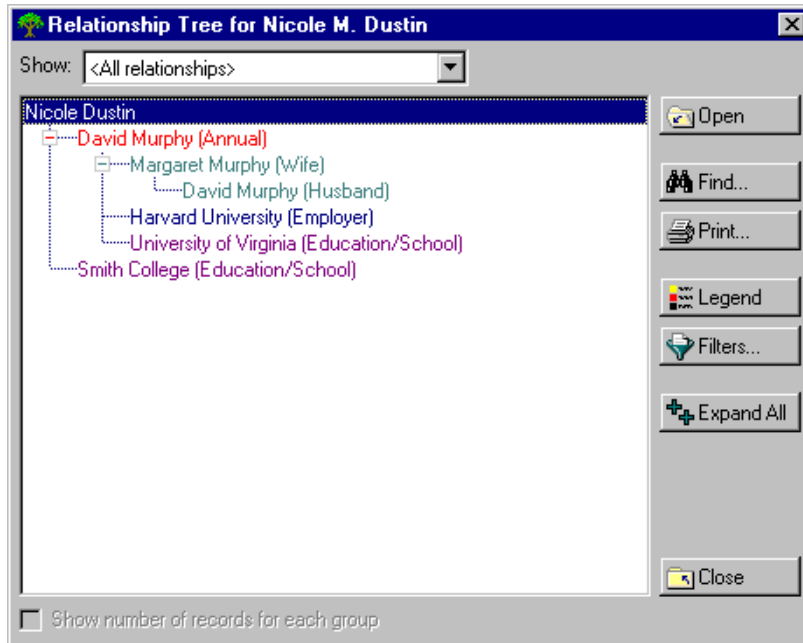


4. Click **Yes**. The organization record for Chicago Rotary Club is deleted from the Relationships tab. If you click **No**, all information remains the same. You return to the Relationships tab of Robert's constituent record.
5. On the toolbar, click **Save and Close**.

## Relationship Tree

You can quickly view individual, organization, fund, bank, education, and assigned solicitor relationship information for a constituent from the Relationship Tree. To access the Relationship Tree, select **View, Relationship Tree** from the menu bar of a constituent record, or click the **Relationship Tree** button on the toolbar. For information about the specific relationship categories, see "Managing Relationships" on page 114. For information about assigned solicitors, see "Solicitors" on page 291. All relationships you enter on the constituent record Relationships tab appear in the Relationship Tree. In addition, you can view all relationships for each entry in the Relationship Tree by expanding the tree view.

For example, Nicole Dustin has two relationships entered on her constituent record: David Murphy, the solicitor assigned to Nicole, and Smith College. When you select to view Nicole's Relationship Tree, David Murphy and Smith College appear. However, if you expand the list, you can view each relationship entered on David Murphy's constituent record and Smith College's constituent record.



To easily locate particular relationship information, you can select the information to appear in the **Show** field, search for a specific relationship, or apply filters to the Relationship Tree entries. From the Relationship Tree Filters screen, you can determine the specific types of relationship to view. You can select to include only relationships who are constituents in your database and to exclude spouse relationships. You can also select to include relationships within a specific date range.

You can select Legend options so certain relationship types appear with a color or text format you choose. If a record qualifies for more than one relationship type with a color or text format selected, you can specify which Legend option appears. By defining relationships with color or text formats, you easily identify information in the Relationship Tree at a glance.

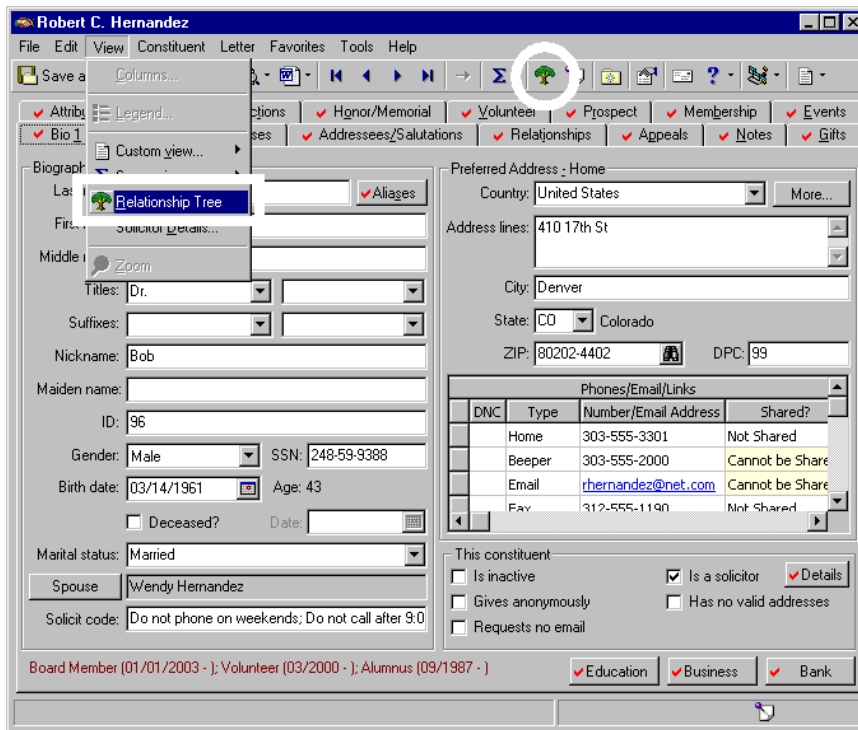


► **Viewing the Relationship Tree from the constituent record**

You can view all relationship information entered on the constituent record Relationships tab from the constituent record menu bar or toolbar.

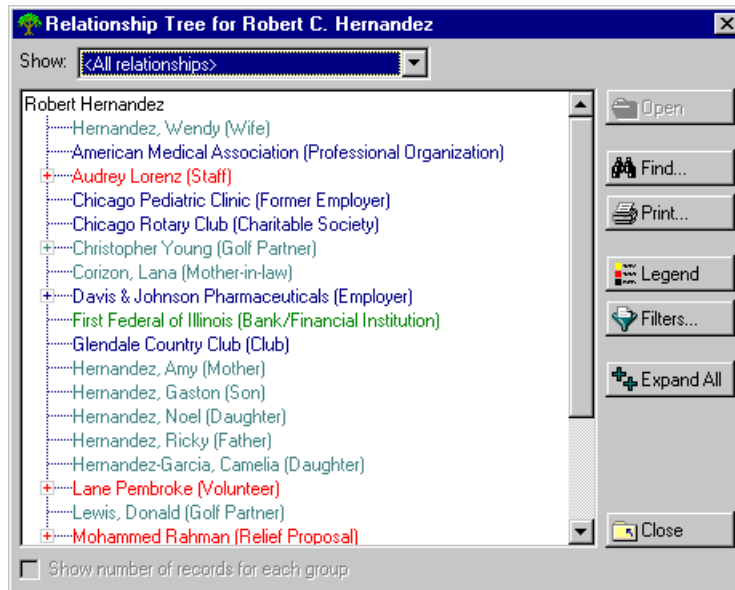
**Scenario:** You are planning your organization’s golf tournament. Robert Hernandez, a constituent in your database, will be attending this event. You need to find out if a golf partner relationship appears on Robert’s constituent record. From the constituent record menu bar, view Robert’s golf partners.

1. From Robert Hernandez’s constituent record menu bar, select **View, Relationship Tree**, or click **Relationship Tree** on the toolbar. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



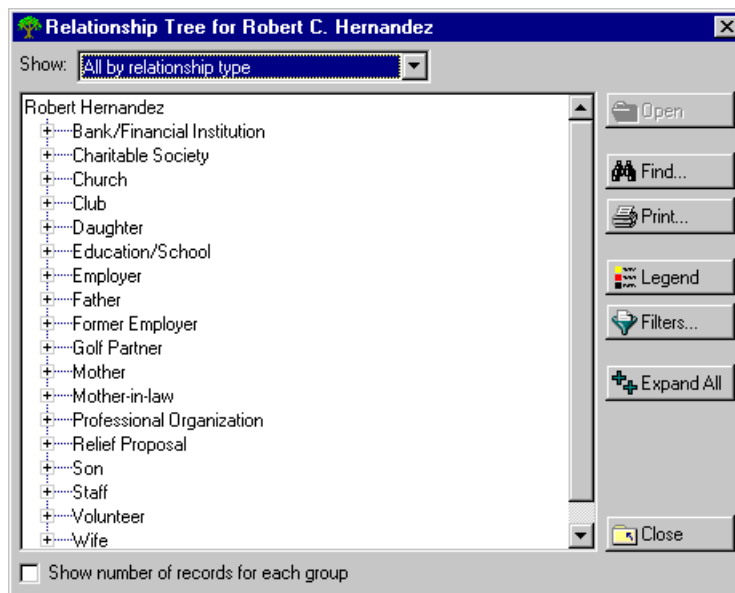
**Tip:** To easily determine the relationship category of an entry in the Relationship Tree, you can assign a specific color or text format to each category. For more information, see “Selecting Legend Options for the Relationship Tree” on page 170.

The Relationship Tree screen appears.

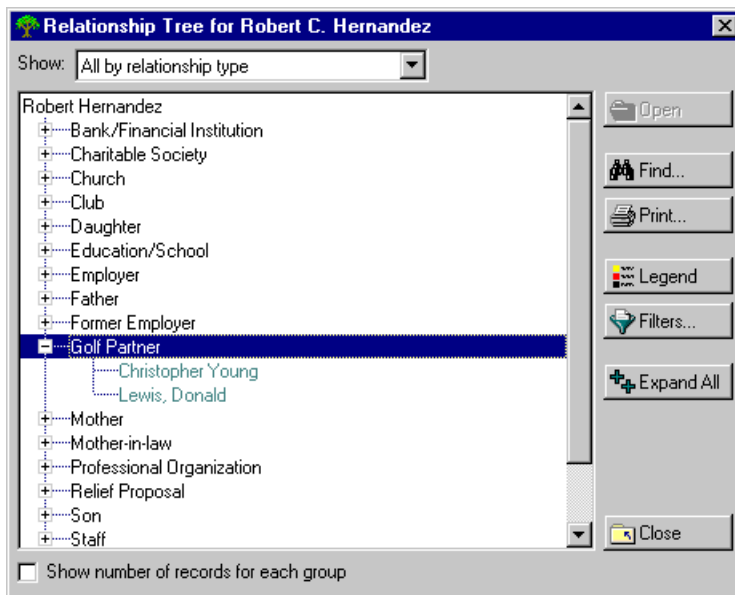


**Note:** To view relationship information for each entry in the Relationship Tree, click **Expand All**.

2. In the **Show** field, select "All by relationship type". All relationship types appear in the tree view.



3. In the Relationship Tree, select “Golf Partner”, and click the plus sign to the left of “Golf Partner” to view the relationships entered for this relationship type.



4. To print the golf partners in the tree view, click **Print**.
5. Click **Close**. You return to Robert’s constituent record.
6. On the toolbar, click **Save and Close**.

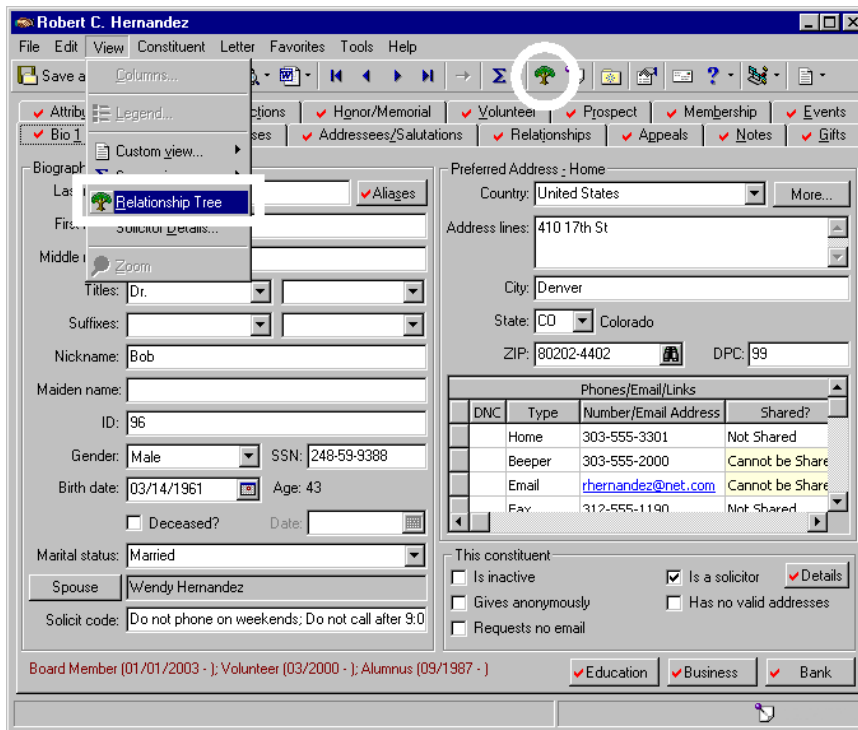
#### ► Filtering entries in the Relationship Tree

To locate specific types of relationships, you can apply filters to the relationship information in the Relationship Tree.

**Scenario:** Audrey Lorenz, a solicitor for your organization, has a lunch meeting with Robert Hernandez to request a contribution to the Annual Campaign. You provide Audrey with information about Robert’s giving history and preferences. Although Audrey knows Robert, she has just recently been assigned as a solicitor, and she wants to make sure she has the correct personal information before the lunch meeting. She wants to know the names of Robert’s family members and business associates. From the Relationship Tree, view the individual relationships for Robert.

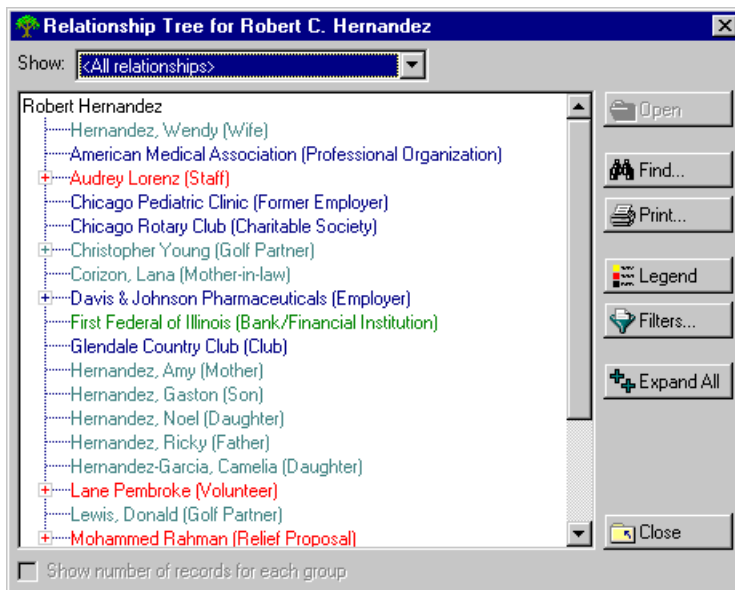
**Note:** You can also print a Constituent Profile to view specific information for a constituent in your database. For more information about Profiles, see the *Reports Guide*.

1. From Robert Hernandez's constituent record menu bar, select **View, Relationship Tree**, or click **Relationship Tree** on the toolbar. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



**Tip:** To quickly find an entry in the Relationship Tree, click **Find** to search for keywords that appear in the tree view.

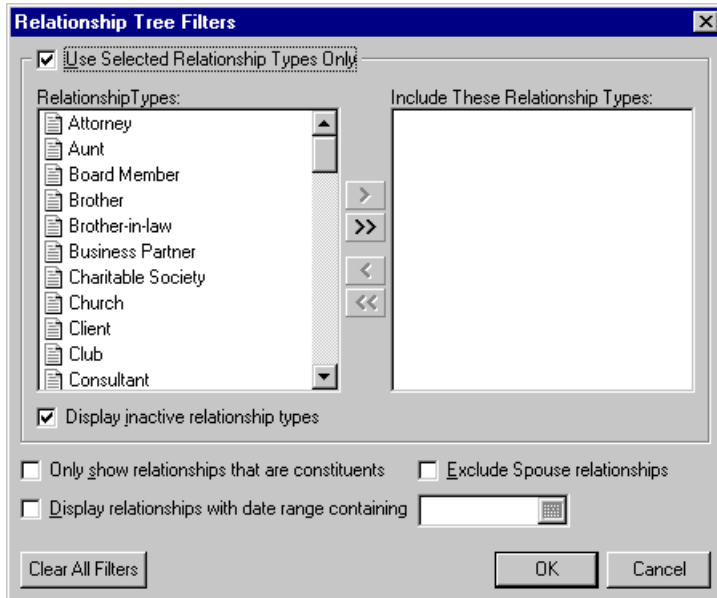
The Relationship Tree screen appears.



2. Click **Filters**. The Relationship Tree Filters screen appears.

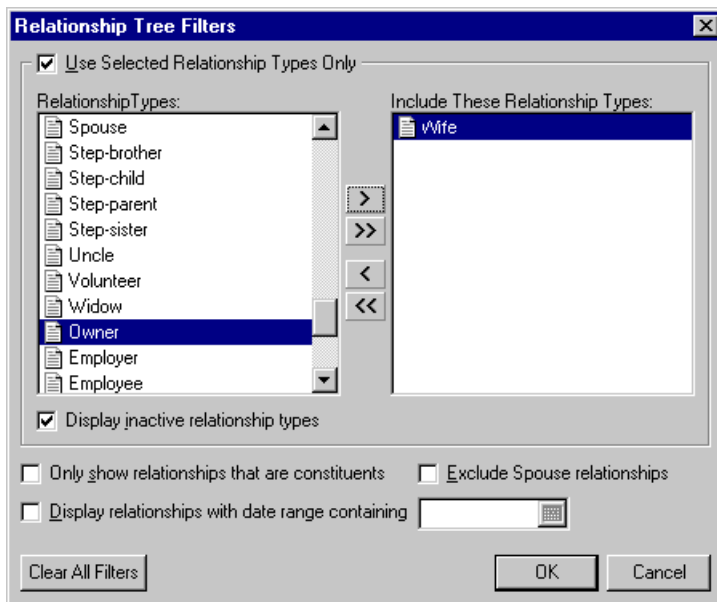
**Note:** By default, once you mark the **Use Selected Relationship Types Only** checkbox, the program also marks the **Display inactive relationship types** checkbox. You can unmark this checkbox to display only active relationship types.

3. Mark the **Use Selected Relationship Types Only** checkbox. Marking this checkbox enables the **Relationship Types** box.



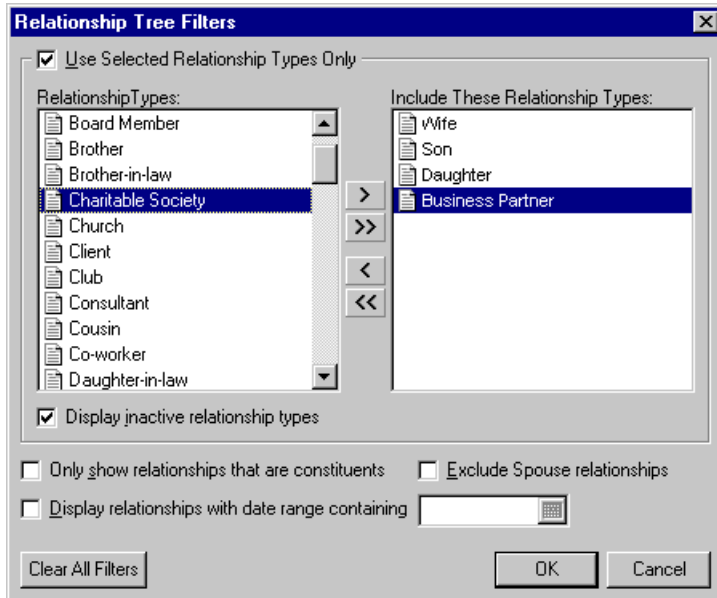
**Tip:** On a screen with a selection box, you can use the single right and left arrows to move one entry back and forth between the two boxes. You can use the double left or right arrows to move all entries at once.

4. In the **Relationship Types** box, select “Wife”, and click the single, right arrow to move “Wife” to the **Include These Relationship Types** box.



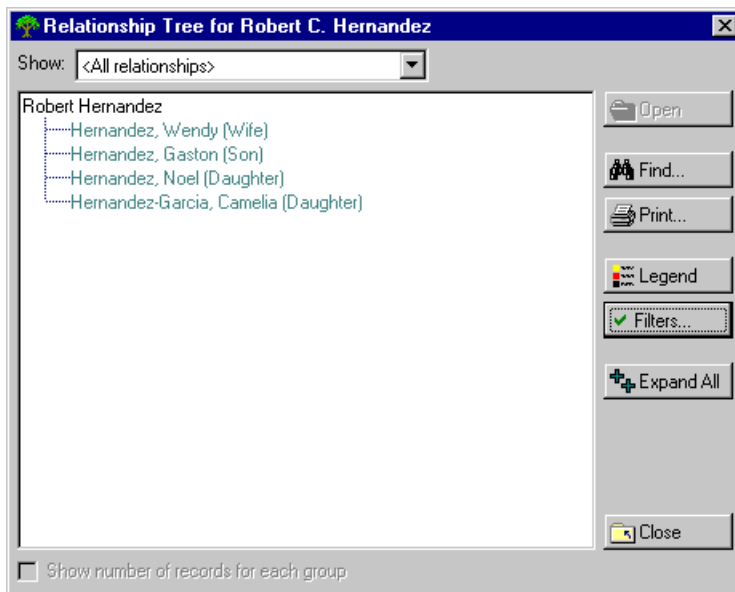
**Note:** You can further filter the results by marking one or more of the following checkboxes: **Display inactive relationship types**; **Only show relationships that are constituents**; **Display relationships with date range containing [ ]**; **Exclude Spouse relationships**.

- From the **Relationship Types** box, move “Son”, “Daughter”, and “Business Partner” to the **Include These Relationship Types** box.



**Note:** To remove all selected filters so you can make new filter selections, click **Filters**. On the Relationship Tree Filters screen, click **Clear All Filters**.

- Click **OK**. You return to Robert’s Relationship Tree screen. Relationships that meet the filter criteria appear in the Relationship Tree.



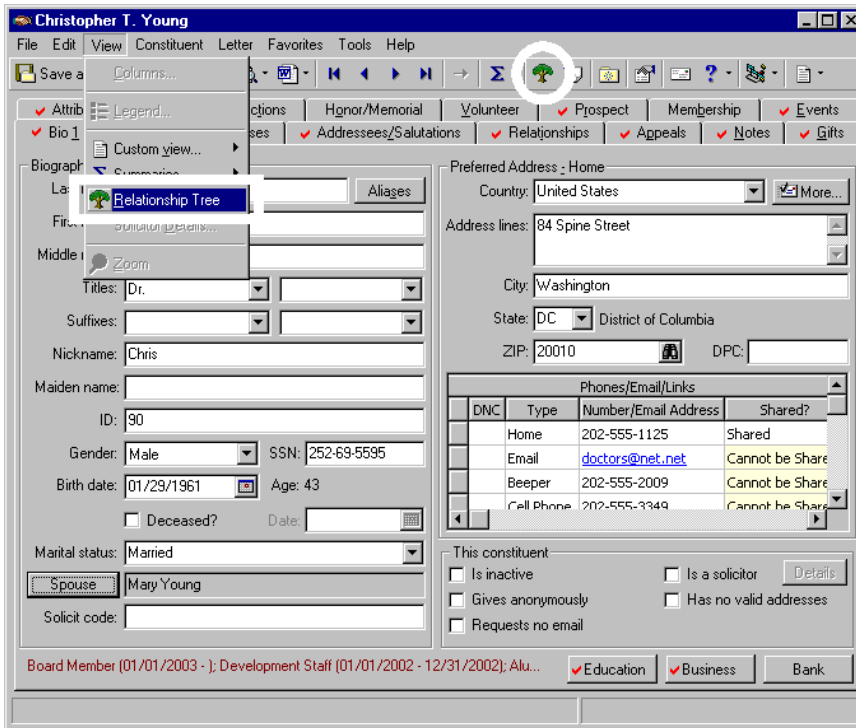
- To print relationships in the tree view, click **Print**.
- Click **Close**. You return to Robert’s constituent record.

9. On the toolbar, click **Save and Close**.

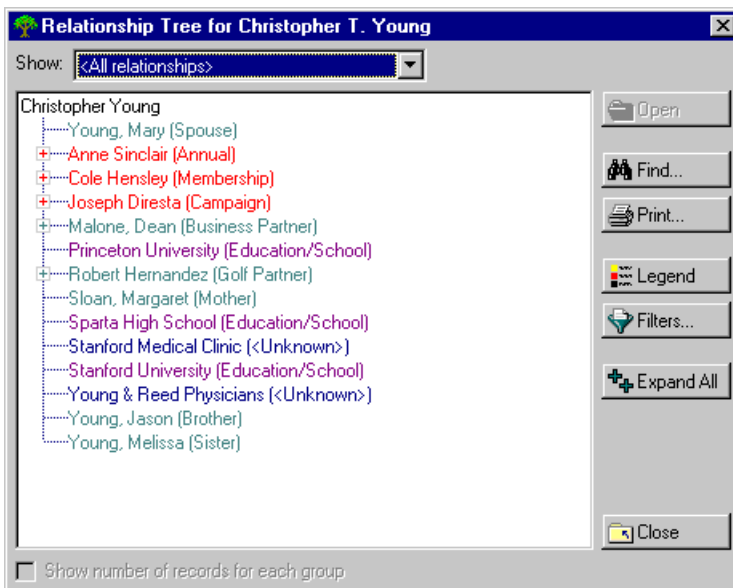
▶ **Selecting Legend Options for the Relationship Tree**

To easily determine the relationship category in the Relationship Tree, you can specify a color or text format to identify each category. For more information about setting legend options in general, see the *Program Basics Guide*.

1. From a constituent record menu bar, select **View, Relationship Tree**, or click **Relationship Tree** on the toolbar. For more information about opening a constituent record, see “Access Constituent Records” on page 4.

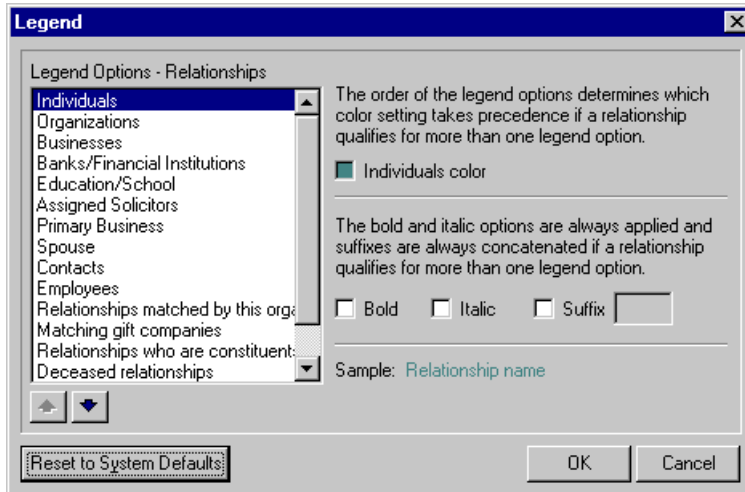


The Relationship Tree screen appears.



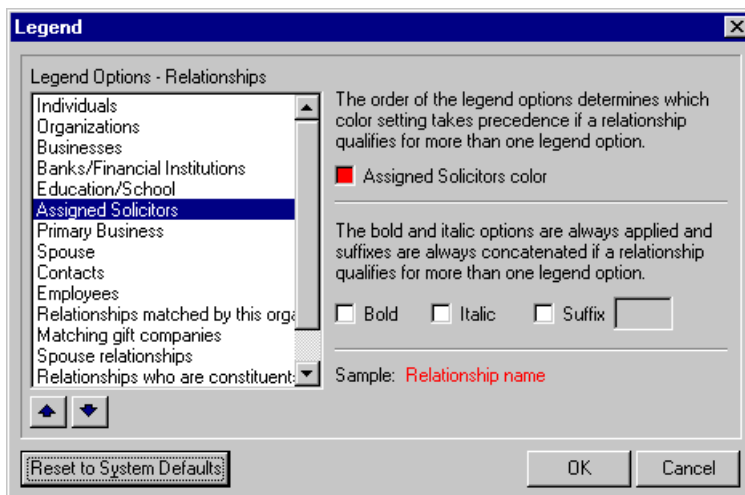
**Note:** You can also format the Relationship Tree legend on the Color tab in User Options. Your selections for legend displays affect only workstations you enter with your password.

2. Click **Legend**. The Legend screen appears.



**Note:** Click **Reset to System Defaults** to undo any legend changes and return to the program default settings.

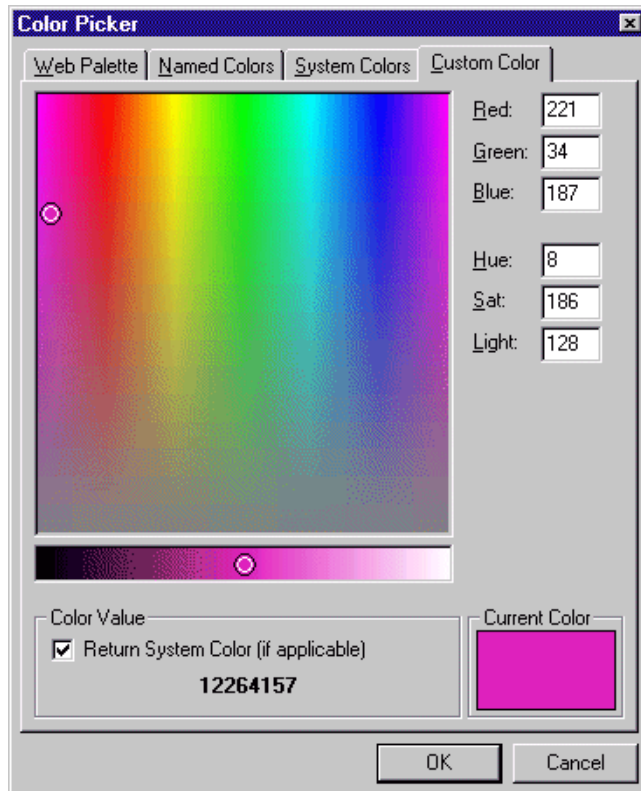
3. In the **Legend Options - Relationships** box, select the relationship you want to format.



**Note:** You can also select a text format — bold or italic — to identify a relationship.



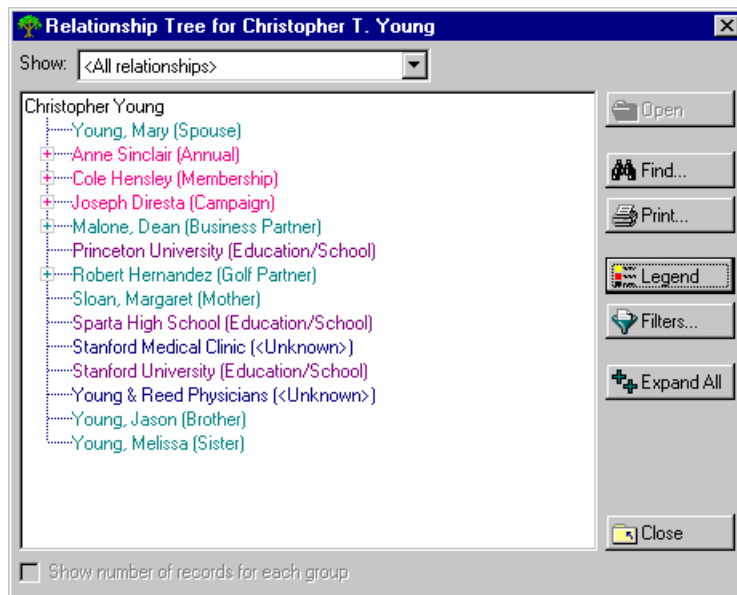
4. Click the **color** box. The Color Picker screen appears.



**Note:** The order in which the options appear in the **Legend Options - Relationships** box determines which color setting takes precedence if a record qualifies for more than one. If a record qualifies for more than one text option, bold and italic formatting matches that of the first entry in the legend options list.

5. Select a tab, select a color, and click **OK**. You return to the Legend screen. The color you selected on the Color Picker screen appears in the relationship **color** box. **Sample** text in the color you selected appears in the bottom right-hand corner of the screen.

- Click **OK**. You return to the Relationship Tree. The relationships entered for the constituent appear in the color you selected.



- Click **Close**. You return to the constituent record.
- On the toolbar, click **Save and Close**.



# Attributes, Notes, Media, and Appeals



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The Attributes, Notes, Media, and Appeals tabs have something in common. They all track additional information, so you can get to know your constituents on a more personal level.

## Managing Attributes, Notes, Media, and Appeals

**Note:** If you have Security rights to *Administration*, you can view System Statistics. From the Administration page, click the **System Statistics** link. Up-to-date totals of all records in your database appear. This information is for viewing purposes only.

The Attributes, Notes, Media, and Appeals tabs have something in common. They all track additional information, so you can get to know your constituents on a more personal level. Attributes record the qualities, characteristics, and preferences of a constituent. They help you fine tune your records with special interests and important dates. Notes make it easy to maintain helpful pieces of information you heard or read about one of your constituents. You can create notepads to record family history, prospect information, or special donation instructions. The Media tab helps you store pictures, letters, and newspaper clippings that pertain to your constituents. By storing these objects in your database, *The Raiser's Edge* keeps this information at your fingertips. Appeals show you at a glance how responsive a constituent has been to your solicitations. It tracks every attempt you made to secure a donation and records which ones were successful.

In this section, we discuss these four parts of a constituent record in detail. We walk you through adding, editing, and deleting this information from a record.

### Attributes

**Warning:** It can be easy to confuse attributes with constituent codes. We recommend you read the "Manage Biographical Information" on page 22 and the Data Entry Protocol chapter of the *Program Basics Guide* to help you understand the differences.

The Attributes tab stores the qualities, characteristics, and preferences you associate with a constituent. Attributes serve as a way for you to identify a constituent's interests, dietary preferences, or special requests. They may include hobbies, activities, committees, and important dates. One of the most useful aspects about attributes is their flexibility. You can customize attributes to meet your organization's specific needs.

Category	Description	Short Desc.	Date	Comments
Anniversary	01/22/1986		03/11/2006	Send card
Committees	Strategic Planning		03/11/2006	Needs 3 months notice for me...
Interests	Golf		12/01/2006	Invite to all tournaments
Interests	Photography		02/01/2006	Professional photographer
Committees	Future Visioning		02/01/2006	Committee chairman
Origin	Personal reference		05/01/2006	Referred by Sheri Porche
Donor Category	Founder		03/11/2006	\$159,900.00

**Note:** Attributes are initially set up using the **Attributes** link in *Configuration*. You then use the Attributes tab of a constituent record to assign attributes to a specific constituent.

Attributes are initially created and defined in *Configuration*. You set up broad categories, such as Interests, and then create descriptions, such as Golf, Fishing, or Gourmet Cooking, to further define the category. You can decide if you want the description to be in the form of a drop-down table, a date field, a numeric field, a Yes/No field, a currency field, a “fuzzy” date field, or a free form text field. Your decision to use one of these types over the other depends on what kind of information you plan to track in the attribute. For example, if your attribute category is Committees, you may select a drop-down table as your description type because there are only five options that apply to your organization. Using a table in this example makes data entry faster and helps to eliminate errors. If your category is Anniversary, you can select to use a “fuzzy” date as your description type. Fuzzy dates let you track a date, even when you are not sure of the exact month, date, and year. You can record just a portion of the actual date (08/28).

Once you establish your attribute categories and descriptions in *Configuration*, use the Attributes tab of the constituent record to assign attributes to specific constituents. You can assign an unlimited number of attributes to a constituent record and if necessary, assign the same attribute more than once to the same constituent. This flexibility guarantees you have no limitations when building a comprehensive constituent record.

Attributes are used throughout *The Raiser's Edge* in many different capacities. You can query a group of constituents together based on a shared common attribute. You can include or exclude constituents from a mailing or report using attributes. They are not only flexible and versatile, they are also easy to maintain. You can globally add, edit, or delete attributes from a group of records. For more information about global change and global delete, see the *Global Add, Delete, & Change Guide*.

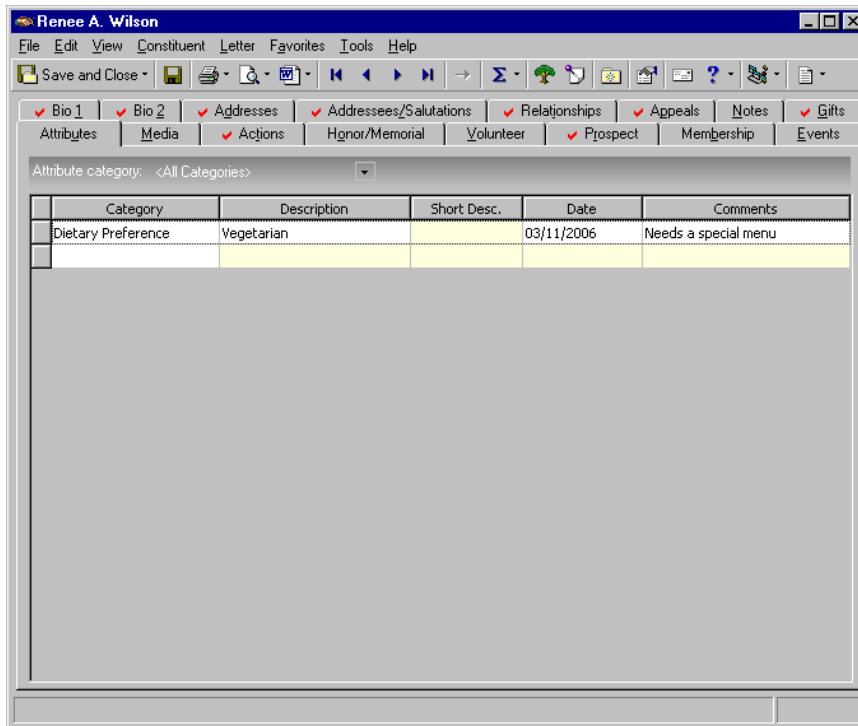
► **Adding an attribute to a constituent record**

**Tip:** Attributes are used to store helpful information in many areas of *The Raiser's Edge*. You add attributes the same way in all areas of the program. All attributes are initially set up in *Configuration*. For more information, see the *Configuration & Security Guide*.

Attributes are an effective way for you to track a constituent's character and personality. You can use the Attributes tab to add attributes to a constituent record.

**Scenario:** Renee Wilson calls to confirm her seating arrangements at your upcoming dinner auction. She also informs you she is a vegetarian and needs a special menu. Add an attribute of "Dietary Preference" to her constituent record to track this information.

1. From Renee Wilson's constituent record, select the Attributes tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.

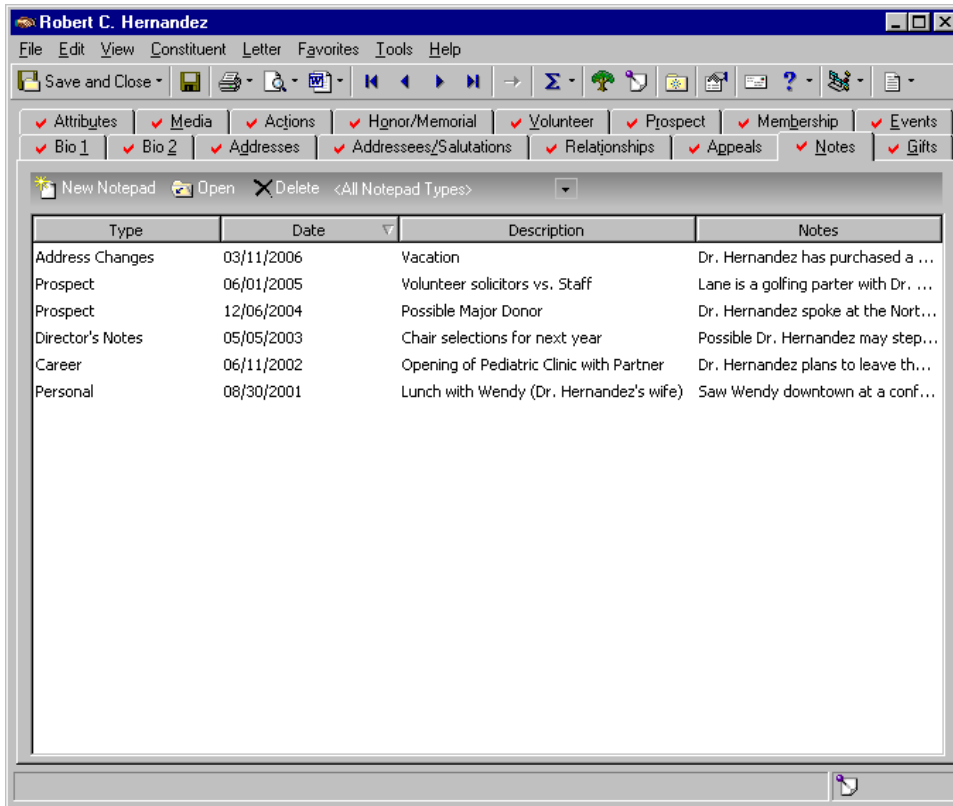


**Tip:** You can edit and delete attributes on the Attributes tab. To delete an attribute, select the attribute and select **Edit, Delete Rows** from the menu bar. From **Globally Delete Records**, you can delete an attribute from the system completely. It is removed from all records and from **Tables** and **Attributes** in *Configuration*. For more information, see the *Global Add, Delete, & Change Guide*.

2. In the Attributes grid, in the first row of the **Category** column, select "Dietary Preference".
3. In the same row, in the **Description** column, enter "Vegetarian".
4. In the same row, in the **Date** column, enter the date you add this attribute.
5. In the same row, in the **Comments** column, enter "Needs a special menu".
6. On the toolbar, click **Save and Close**.

## Notes

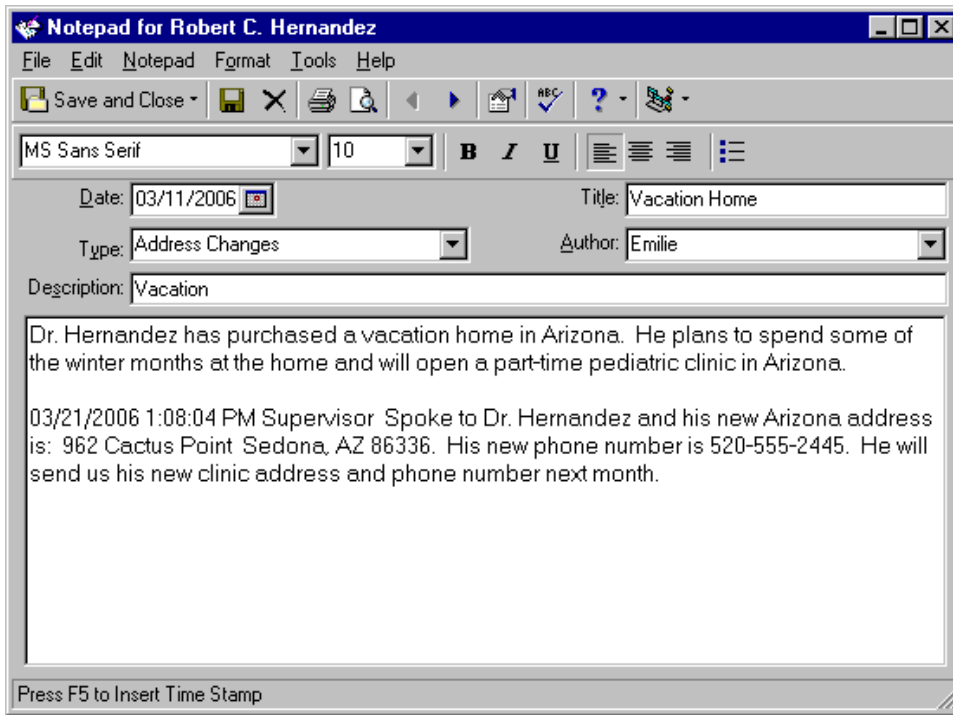
In *The Raiser's Edge*, the Notes tab makes it easy to maintain helpful pieces of information you heard, read, or need to remember about a constituent.



**Tip:** On a Notepad screen, you can press **F7** on your keyboard; select **Tools, Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT + F7** on your keyboard or select **Tools, Thesaurus** from the menu bar to access the thesaurus.



You can create notepads to record family history, prospect information, or special donation instructions. Each notepad has a **Date**, **Type**, **Title**, **Description**, and **Author**. The notepad itself accepts free-form text and holds a large amount of information.



**Note:** On a Notepad screen, you can add time stamps to designate who added text to the note and when the text was added. In the notepad grid, place your cursor in front of the section of the note you want to stamp and press **F5** on your keyboard. Your login name and today's date appear before that section of text.

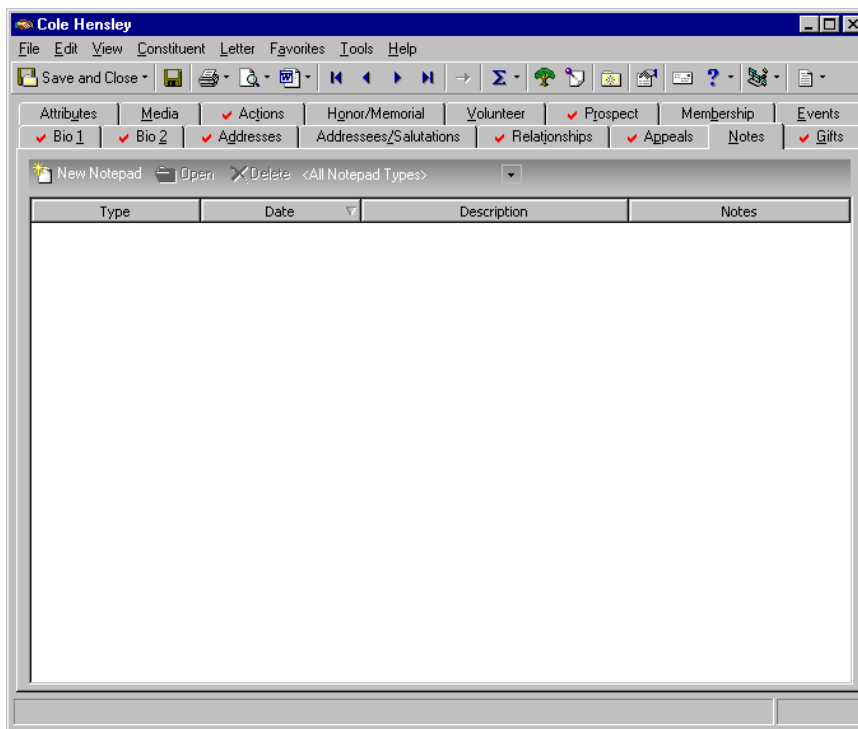
Notes are different from Attributes because they can be secured by **Type**. You can set up your security so only certain users can view particular note types. This is especially useful when the information is of a sensitive nature and you want to ensure that only you can access the information. For more information about setting up security access, see the *Configuration & Security Guide*.

► **Adding a note from the Notes tab**

Notes are excellent tools that give you additional insight into a constituent's character and history. The Notes tab stores the notepads for each constituent. Once you add a note, you can select it and click **Open** on the action bar to open the note to edit or view it. You can also click **Delete** on the action bar to permanently delete it from your database.

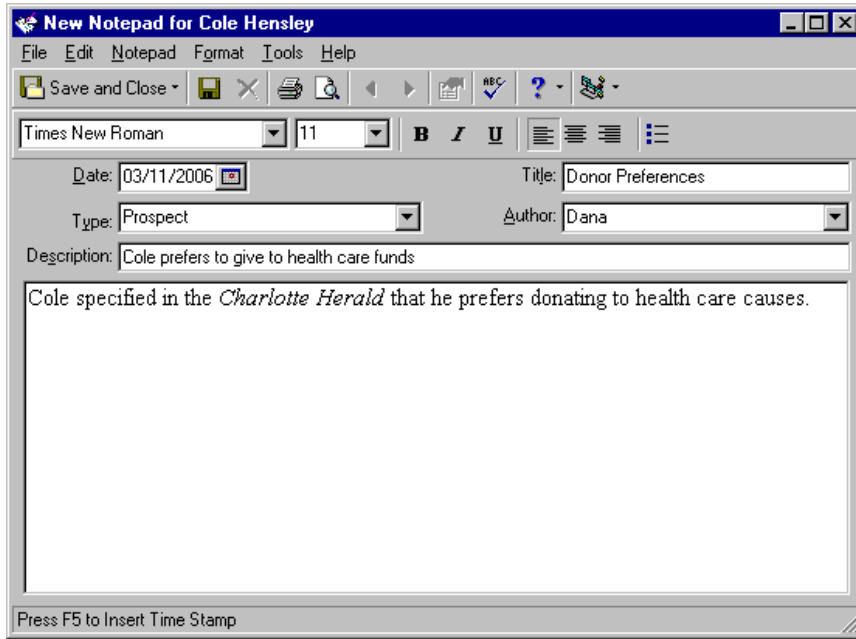
**Scenario:** Cole Hensley, one of your major donor prospects, is mentioned in the *Charlotte Herald* for donating an undisclosed amount of money to the Charlotte Memorial Hospital fund for the new surgical wing. The article mentions he prefers to donate to health care-related organizations. Add a new prospect note from Cole's constituent record to track this information.

1. From Cole Hensley's constituent record, select the Notes tab. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



**Note:** When adding notes to a notepad on a constituent record, you can add time stamps to designate who added text to the note and when the text was added. In the notepad grid, place your cursor in front of the section of the note you want to stamp and press **F5** on your keyboard. Your login name and today's date appear before that section of text.

2. On the action bar, click **New Notepad**. The New Notepad screen appears.



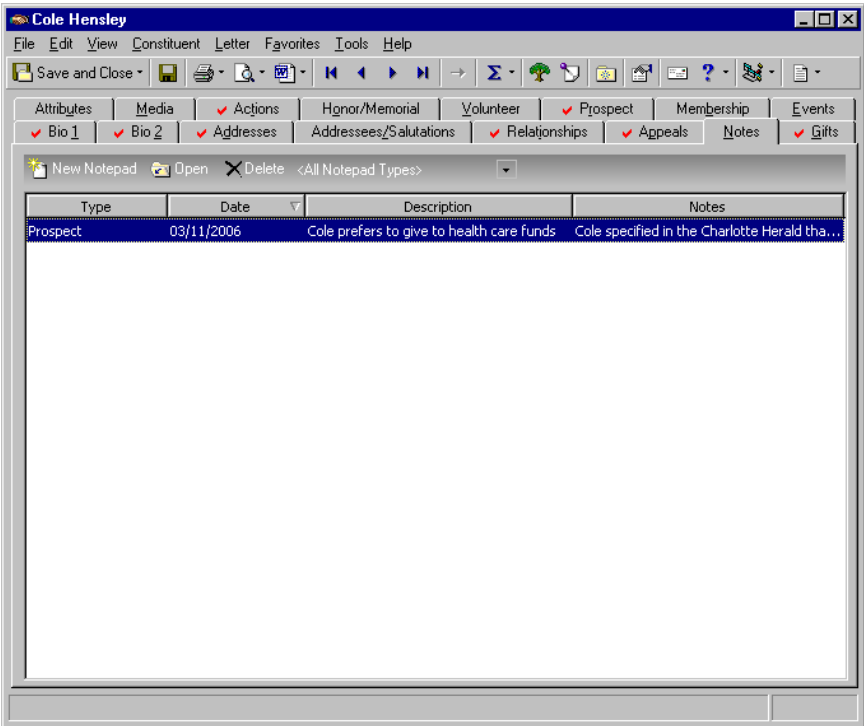
**Tip:** You can easily import and export notepad contents. Right-click in the text box. From the menu that appears, select **Load from File** or **Save to File**.

3. In the **Date** field, enter today's date.
4. In the **Type** field, select "Prospect".
5. In the **Title** field, enter "Donor Preferences".
6. In the **Author** field, select your name. You entered this note.
7. In the **Description** field, enter "Cole prefers to give to health care funds".

**Tip:** On a Notepad screen, you can press **F7** on your keyboard; select **Tools, Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT + F7** on your keyboard or select **Tools, Thesaurus** from the menu bar to access the thesaurus.

8. In the text box, enter "Cole specified in the *Charlotte Herald* that he prefers donating to health care causes."

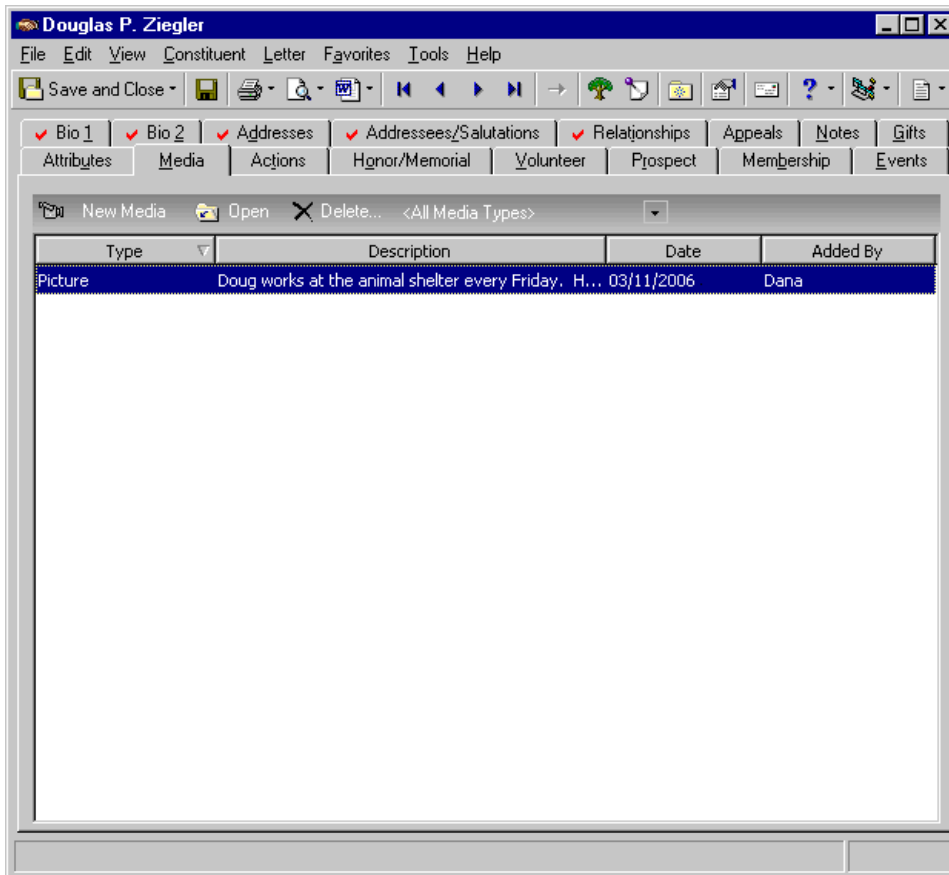
- 9. On the toolbar, click **Save and Close**. You return to the Notes tab of Cole’s constituent record. The note appears in the grid.



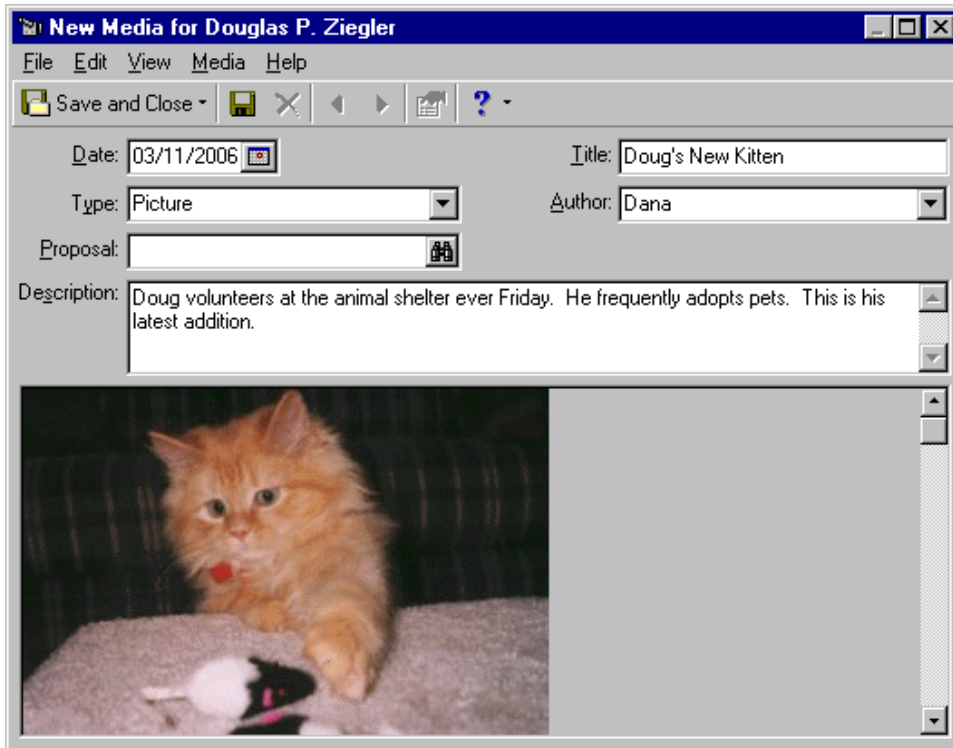
- 10. Click **Save and Close**.

## Media

The Media tab stores media objects pertaining to a constituent. These objects can include newspaper clippings, letters, pictures, and graphs. By storing these objects in your database, *The Raiser's Edge* keeps this information at your fingertips.



From the Media tab, if you have rights established from the **Security** link of *Administration*, you can add, open, edit, and delete media items. When you click **New Media**, the Media for screen appears so you can add a media object. You can track the **Date**, **Type**, **Title**, **Proposal**, **Author**, and **Description** of the object. However, only the **Date** and **Type** are required fields. When you add a media object to a constituent record, you insert an electronic copy of the object. Changes to the original object do not affect the copy, unless you link the two. You can make changes to the electronic copy from the Media tab.



**New Media for Douglas P. Ziegler**

File Edit View Media Help


Save and Close

Date: 03/11/2006 Title: Doug's New Kitten

Type: Picture Author: Dana

Proposal:

Description: Doug volunteers at the animal shelter every Friday. He frequently adopts pets. This is his latest addition.

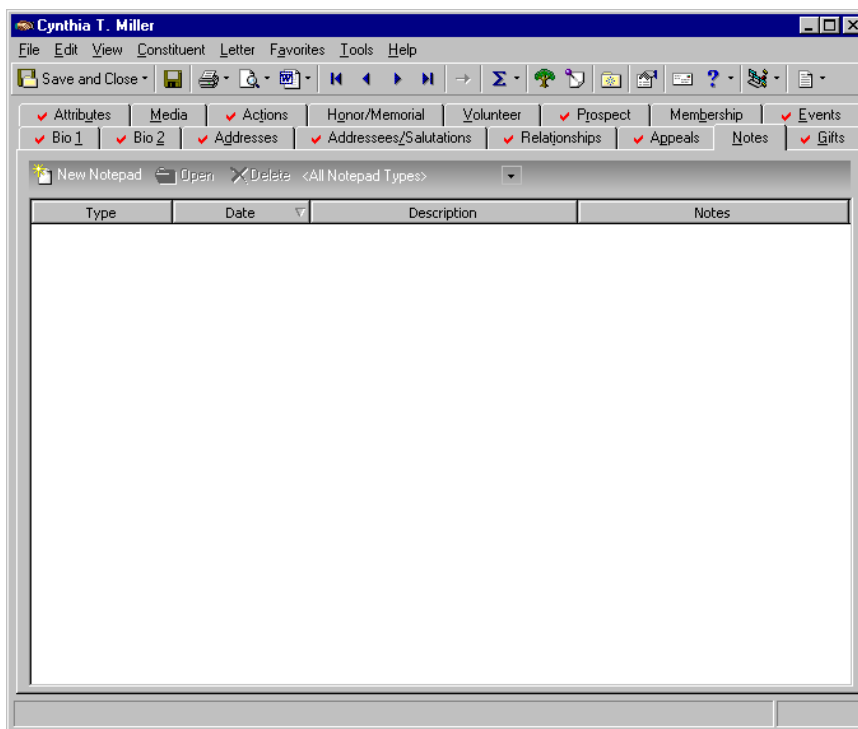


► **Adding a media object**

The Media tab is a great way to include visual and sound objects on a constituent record. You can create a new object or use an object that already exists. Once you add a media object, you can select it and click **Open** on the action bar to open the item to edit or view it. You can also click **Delete** on the action bar to permanently delete it from your database.

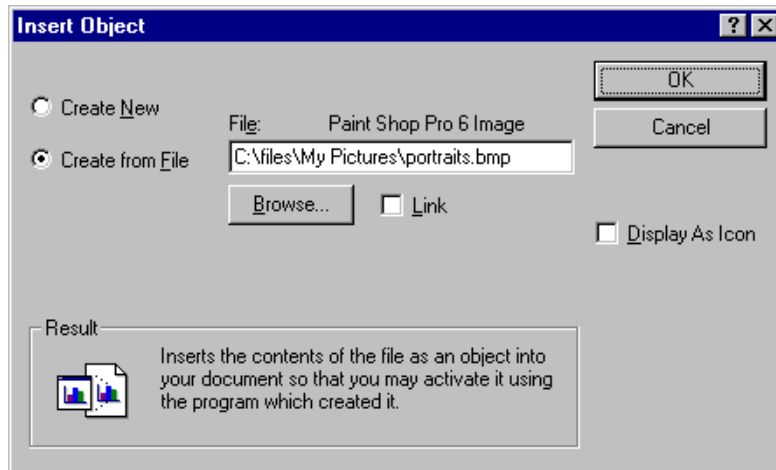
**Scenario:** Cynthia Miller’s baby, Jamie, recently won first prize in the local cute baby contest. Add pictures of Jamie to the Media tab of Cynthia’s constituent record. Next time Cynthia donates to your Children’s Fund, you can use Jamie’s pictures to create a thank-you card.

1. From Cynthia Miller’s constituent record, select the Media tab. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



**Note:** To generate a new media object, select **Create New**. You can use various object types, such as Microsoft Word, Powerpoint, Paintbrush, and Adobe Acrobat.

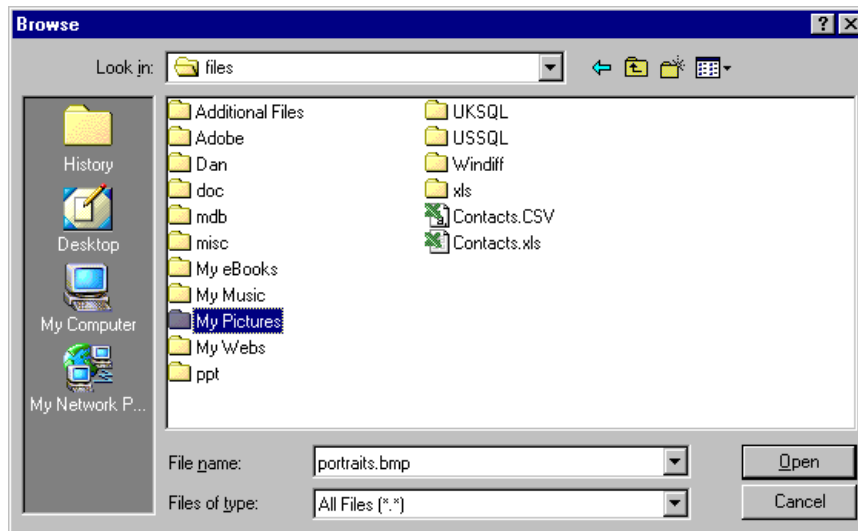
2. On the action bar, click **New Media**. The Insert Object screen appears.



Mark the **Create from File** option. You are going to add a media object from a file you previously created and saved.

**Note:** You can mark the **Link** checkbox to add a path to the original object, instead of embedding a copy of the object in the database. As long as the linked path is valid and available, you can access the desired object.

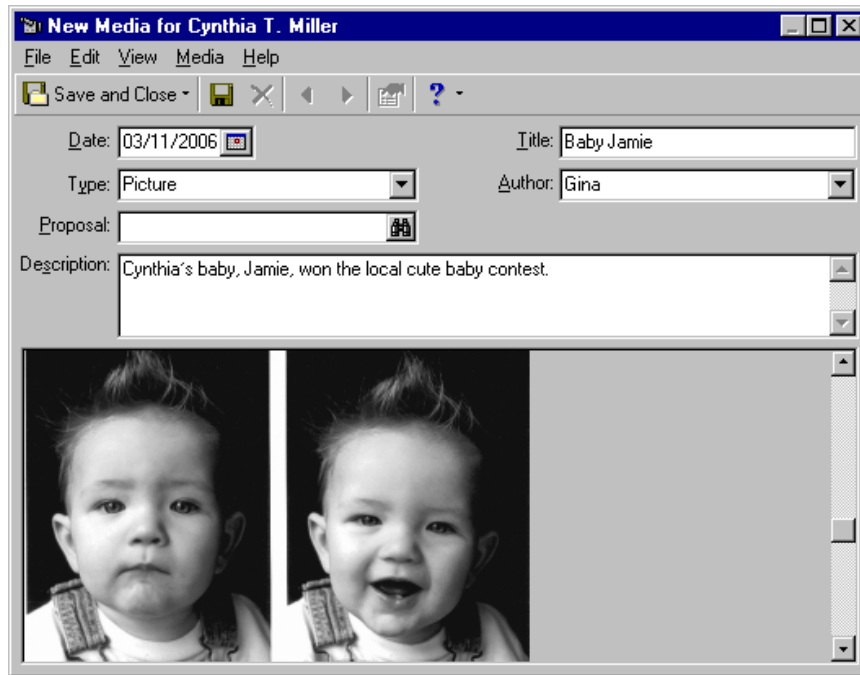
3. Click **Browse**. The Browse screen appears.



4. Locate the media object and click **Open**. You return to the Insert Object screen.

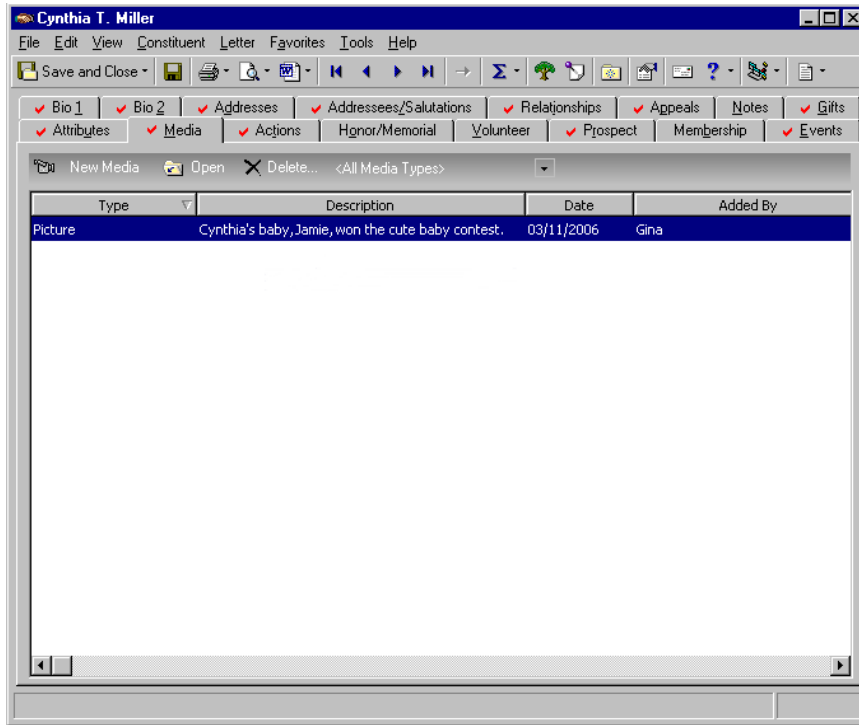


5. Click **OK**. The New Media for screen appears.



6. In the **Date** field, enter today's date.
7. In the **Type** field, select "Picture".
8. If this media object is related to a proposal, you can click the binoculars in the **Proposal** field to search your database for that proposal. For this scenario, leave the **Proposal** field blank.
9. In the **Description** field, enter "Cynthia's baby, Jamie, won the cute baby contest."
10. In the **Title** field, enter "Baby Jamie".
11. In the **Author** field, select your user name.

12. Click **Save and Close**. You return to the Media tab of Cynthia's constituent record.



13. Click **Save and Close**.

## Appeals

The Appeals tab on the constituent record shows you at a glance how responsive a constituent has been to your fundraising efforts. It tracks the attempts you made to secure a donation and shows you which ones were successful. The Appeals tab also lists gift totals for appeals to which the constituent responded. Appeals are the means you use to raise money for your organization. They can be anything from a letter, to a phonathon, to a dinner party.

Appeal	Package	Date	Response	Total Given	Marketing Segment
Unsolicited		04/08/2008		\$15,200.00	
Membership Mailing	Newsletter Envelope	07/30/2007	Responded	\$500.00	
Proposal Appeal		09/21/2006	Responded	\$194,000.00	
Annual Exhibit		05/13/2006	Attended	\$2,000.00	
Open House Letter	Electronic Invitation to th...	02/01/2006	Responded	\$325.00	
Celebrity Auction	Celebrity Auction page on...	07/24/2005	Attended	\$5,000.00	
Annual Newsletter		04/21/2005	Responded	\$100.00	

If you have security rights established from the **Security** link of *Administration*, you can view, edit, and delete an appeal from this tab. However, we recommend establishing your appeals from the **Appeals** button in *Records*. Doing this helps ensure accuracy and consistency throughout your database. For more information about the Appeals tab, see the *Campaigns, Funds, and Appeals Data Entry Guide*.

If you maintain a current list of appeals on your constituents' records, you can run reports to analyze the success of specific appeals. You can generate queries that group together constituents who have received ten appeals, for example, but have never donated a gift. These constituents can then be focused on for heavier soliciting or perhaps, for exclusion from future mailings. Tracking appeals is a good way to monitor your fundraising success and is easy to maintain. After generating your Planned Giving letter in *Mail*, for example, you can globally add that appeal to all constituents who received the letter. For more information about generating appeal mailings, see the *Mail Guide*.

### Marketing Segment, Marketing Source Code, Mailing ID, and Finder Number

The **Marketing Segment**, **Marketing Source Code**, **Mailing ID**, and **Finder Number** columns capture information related to your organization's direct marketing fundraising initiatives. In the **Marketing Segment** column, for each appeal, you can enter the marketing segment (target group) to which the constituent belongs. Marketing Segmentation helps the effectiveness of your fundraising by enabling you to target your best prospects with the appropriate packages (mailings for example). The main reason to use segmentation is that different groups of donors will have different responses to appeal packages. Targeting specific groups enables you to increase the effectiveness of your direct marketing.

In the **Marketing Source Code** column, for each appeal, you can enter the code associated with a package. This code can be a series of letters and/or numbers affixed to an outgoing initiative that identifies such things as the list, offer, package, segment, and media. In the **Mailing ID** column, you can enter a number that identifies the specific mailing that generated the gift. In the **Finder Number** column, you can enter a number to identify a person in the mailing.

The **Marketing Segment**, **Marketing Source Code**, **Mailing ID**, and **Finder Number** columns can be used to receive data from **Blackbaud Direct Marketing**. For information about **Blackbaud Direct Marketing**, see the **Blackbaud Direct Marketing** documentation or contact your account representative.



# Constituent Annotations, Letters, Record Conversions, and Merges



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# Constituent Annotation

**Note:** Some examples of annotations include “This constituent is a generous donor. Please handle her with special care.” or “See Dianne Daniels before adding any data to this constituent record.”

You can store one annotation, or note, for each constituent record. The annotation should be a quick reminder type of note. You can add an annotation by selecting **Edit, Annotate** from the menu bar of a constituent record. On the Annotate screen that appears, you can choose to display the annotation automatically when the constituent record is opened. This helps if the note discusses something important each user should know about the constituent. If you do not want the annotation to appear automatically when the constituent record is opened, you have the option of displaying the annotation only when clicking the **Annotate** button on the toolbar of the constituent record. However you choose to view your constituent annotation, an annotation icon appears in the status bar of the constituent record as a reminder it is present.

You can also store one annotation for each event record. For more information about event annotations, see Event Annotation in the *Event Management Data Entry Guide*.

## ▶ Adding a constituent annotation

An annotation should be a quick reminder type of note.

**Tip:** You can press **CTRL + T** on your keyboard to quickly access the Annotate screen.

1. From a constituent record, select **Edit, Annotate** from the menu bar. For more information about opening a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows a web-based constituent record for Mark D. Adamson. The 'Edit' menu is open, and the 'Annotate...' option is highlighted with a blue background and the keyboard shortcut 'Ctrl+T'. The form displays various fields for the constituent's information, including address, contact details, and preferences.

**Mark D. Adamson**

File Edit View Constituent Letter Favorites Tools Help

Undo Ctrl+Z Cut Ctrl+X Copy Ctrl+C Paste Ctrl+V Delete Del

Insert Row Delete Rows... Select Row Select All Rows Ctrl+A Export Grid... Export Grid to Excel

Find... Ctrl+F

Actions Honor/Memorial Volunteer Prospect Membership Events

Addresses Addressees/Salutations Relationships Appeals Notes Gifts

Preferred Address : Home

Country: United States More...

Address lines: 125 Smokerise Way

City: Charleston

State: SC South Carolina

ZIP: 29401 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	843-555-6698	Not Shared
	Email	madamson@sncn.net	Cannot be Shared

SSN: 269-53-1152

Birth date: 09/23/1954 Age: 50

Deceased? Date:

Marital status: Divorced

Spouse:

Solicit code: Do not phone at work

Trustee

This constituent

Is inactive  Is a solicitor Details

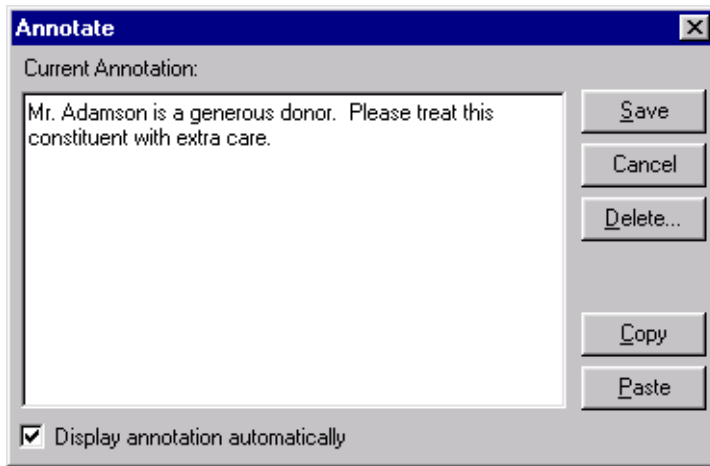
Gives anonymously  Has no valid addresses

Requests no email

Education Business Bank

**Note:** On the Annotate screen, you can cancel the annotation if you decide you do not want to add it; you can delete the annotation; or you can copy and paste your annotation.

The Annotate screen appears.



2. Enter your annotation (note) directly into the **Current Annotation** box.
3. If you want the Annotate screen displaying your annotation to appear automatically each time you open the constituent record, mark the **Display annotation automatically** checkbox.

If you do not mark this checkbox, after you save your annotation, you must later select **Edit, Annotate** from the menu bar or click the **Annotate** button on the toolbar or the lower right hand corner of the constituent record to view your annotation.

4. On the Annotate screen, click **Save**. You return to the constituent record.
5. On the toolbar, click **Save and Close**.

## Creating a Letter from a Constituent Record

**Note:** On the Letters page, accessed from the **Letters** link of *Configuration*, you can set up the letters you use at your organization. You can create merge documents from *The Raiser's Edge*, link letters you create from Microsoft Word to *The Raiser's Edge*, and edit your merge fields. For more information about the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

In *The Raiser's Edge*, if you use Microsoft Word, you can create a letter from an individual or organization constituent record, using the **Letter** menu. To create a customized letter from a constituent record, you can select the merge fields you want to export out of *The Raiser's Edge* to use within your letter, create the merge document, and select the letter from the **Letter** menu to automate the merge process. You can also quickly write a letter by selecting **Write a letter** from the **Letter** menu. A Word document appears with fields already selected for your letter. By using the **Letter** menu, you can quickly and easily print a single letter for a constituent while working in *Records*.

For example, your organization sends a letter of congratulations to constituents who become new parents. Ellyn and Derek Hassell, constituents in your database, recently had a baby boy. You want to immediately send a letter congratulating the couple on the birth of their son. Instead of creating a mailing for this one record in *Mail*, you can quickly generate the letter from the **Letter** menu of Derek's constituent record.

### ► Creating a new letter and generating a mail merge from the Letter menu of a constituent record

**Warning:** For your organization's mailings, it is much more efficient to use *Mail* to generate letters for multiple constituents. For information about generating constituent mailings, see the *Mail Guide*.



If you use Microsoft *Word*, you can create a letter from the **Letter** menu of an individual or organization constituent record. From the constituent record, you can create a merge document and select the merge fields you want to export out of *The Raiser's Edge* to use within your letter. Once you define the merge fields for a letter, you can automate the mail merge by selecting the letter from the **Letter** menu of a constituent record.

**Scenario:** Clara Daniels donates an antique table and chairs to your organization. You want to write and let her know how wonderful the table and chairs look in the drawing room, and how happy you are to receive them. From the **Letter** menu of her constituent record, create the letter in Microsoft *Word*, define the merge fields in *The Raiser's Edge*, and print the letter for Clara.

**Tip:** You can also click the down arrow beside the *Word* button on the toolbar to create a new letter.

1. From Clara Daniel's constituent record, select **Letter, Create a New Letter Format** from the menu bar. For more information about opening a constituent record, see "Access Constituent Records" on page 4.

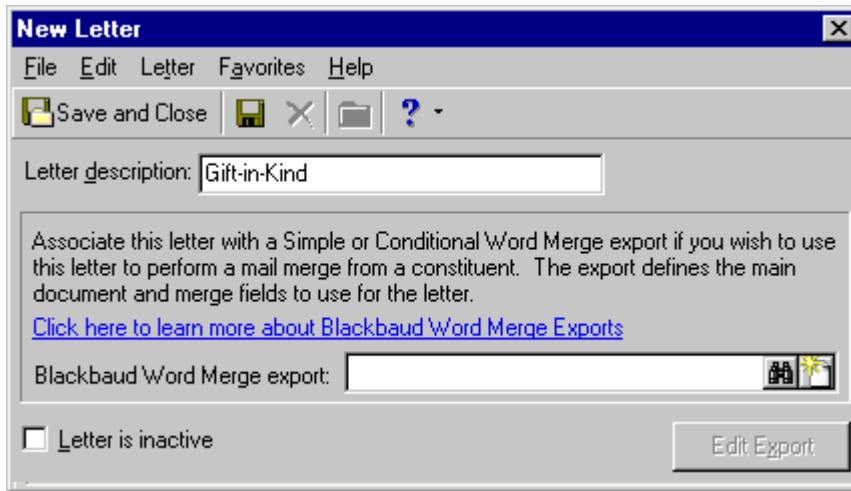
The screenshot shows the 'Clara M. Daniels' constituent record window. The 'Letter' menu is open, displaying options: Individual Letter, Org Letter, Constituent Welcome Letter, President's Letter, Brochure Letter, New Membership Welcome, Appointment Reminder, **Create a New Letter Format** (highlighted), and Modify Letter Menu... The main window contains the following information:

- Biographical:** Last name: Daniels, First name: Clara, Middle name: Myrtle, Titles: Mrs., Suffixes: (empty), Nickname: (empty), Maiden name: Prosser, ID: 194, Gender: Female, SSN: 011-00-9875, Birth date: 12/30/1915, Age: 89, Deceased? (unchecked), Marital status: Widowed, Spouse: Jesse E. Daniels, Solicit code: Do not phone on weekends; Do not call after 9:0
- Preferred Address: Home:** Country: United States, Address lines: 48 Farmridge Road, City: Danbury, State: CT Connecticut, ZIP: 06810, DPC: (empty)
- Phones/Email/Links:**

DWC	Type	Number/Email Address	Shared?
	Home	203-555-2523	Shared
- This constituent:**
  - Is inactive
  - Gives anonymously
  - Requests no email
  - Is a solicitor
  - Has no valid addresses
- Buttons:** Education, Business, Bank

**Warning:** Microsoft *Word* integration appears on your computer only if *Word 2000* or above is installed.

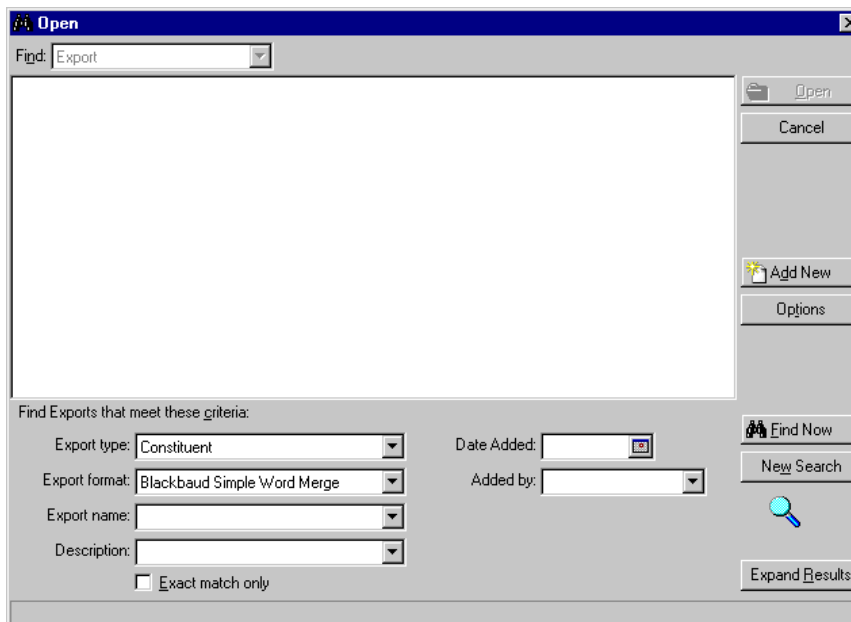
The New Letter screen appears.



2. In the **Letter description** field, enter “Gift-in-Kind”. The antique table and chairs are a gift-in-kind donation to your organization.

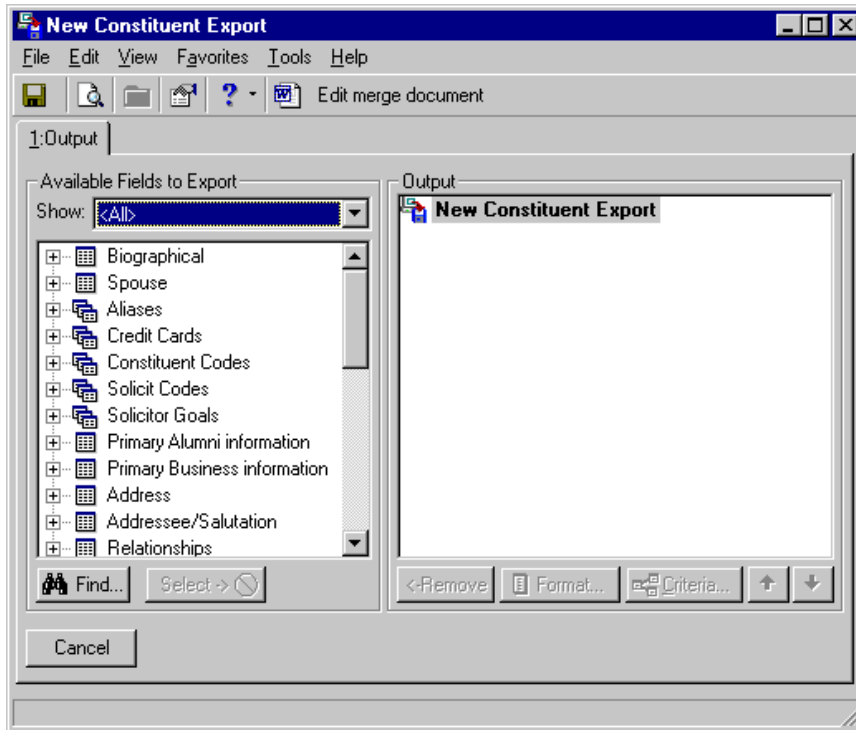
**Note:** On the Letter screen, in the **Blackbaud Word Merge export** field, you can also click the Add a new Blackbaud Word Merge export button to bypass the Open screen.

3. In the **Blackbaud Word Merge export** field, click the binoculars. The Open screen for exports appears.



**Note:** For more information about working with export files, see the Export chapter of the *Query & Export Guide*.

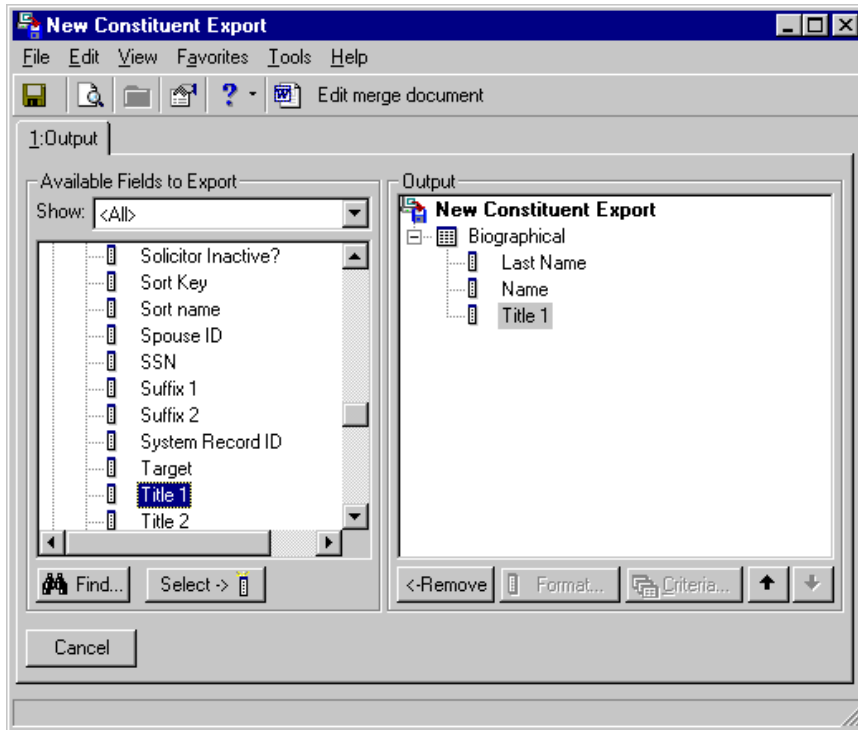
- From the Open screen, you can search for an export file you already created and saved for a mail merge, or you can create a new export file for a mail merge. You need to create a new export file for this letter to Clara. Click **Add New**. The New Constituent Export screen appears.



**Tip:** To show only Biographical category fields, select Biographical in the **Show** field of the **Available Fields to Export** box. This can make finding a biographical field easier and faster. You can focus on selecting from just those fields.

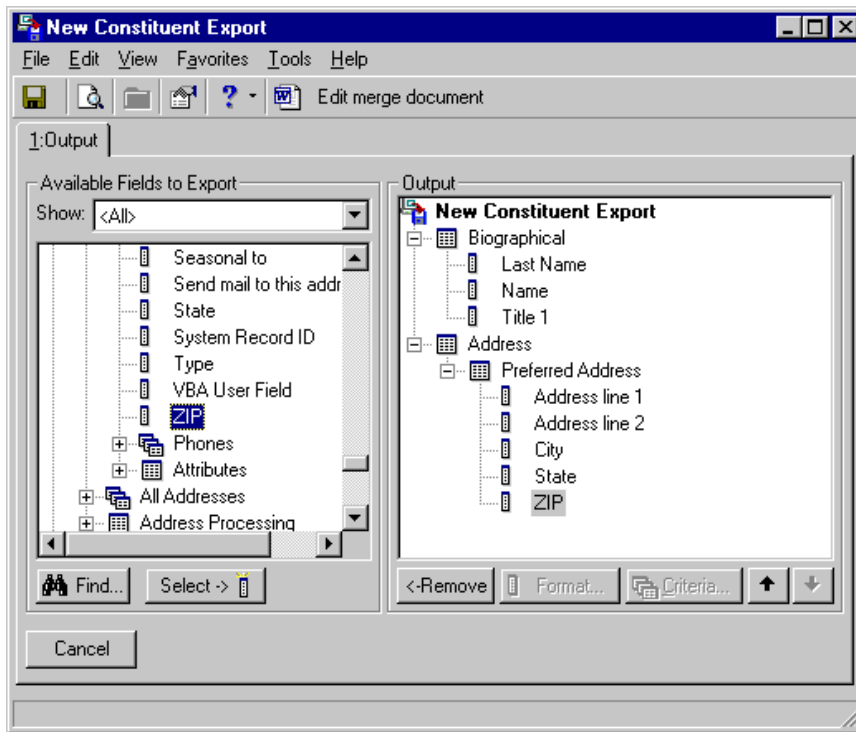
- On the Output tab, you need to select the merge fields you want to use in your letter to Clara. In the **Available Fields to Export** box on the left, click the plus sign to the left of the Biographical category. The biographical field list expands, and the plus sign turns to a minus sign. From this list, you decide you need **Last Name**, **Name**, and **Title 1** as biographical merge fields in your letter.
- Under Biographical, scroll down and double-click **Last Name**. **Last Name** appears in the **Output** box on the right. To move a field from the **Available Fields to Export** box, you can also select the field and click **Select**.

7. Move **Name** and **Title 1** over, one at a time. Once you move these fields over, you are finished with the Biographical category. If you want, you can click the minus sign to the left of Biographical to close the category.



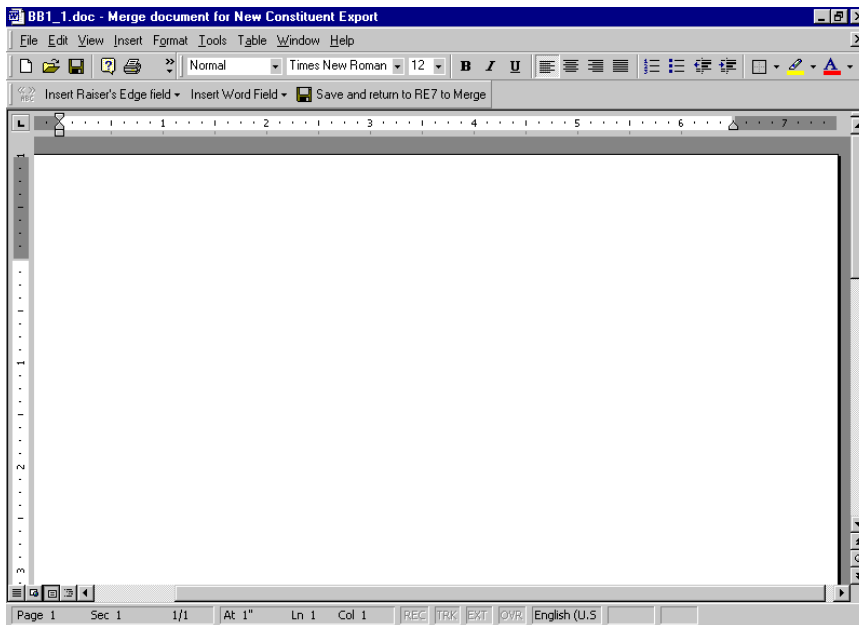
**Tip:** To show only address fields, select Address in the **Show** field of the **Available Fields to Export** box. This can make finding an Address category field easier and faster. You can focus on selecting just those fields.

8. In the **Available Fields to Export** box, scroll down to the Address category (under Primary Business information) and click the plus sign to the left. Next, click the plus sign to the left of Preferred Address. The preferred address field list expands. From this list, you decide you need **Address line 1**, **Address line 2**, **City**, **State**, and **ZIP** as address merge fields in your letter. Scroll down and double-click each to move them over to the **Output** box.



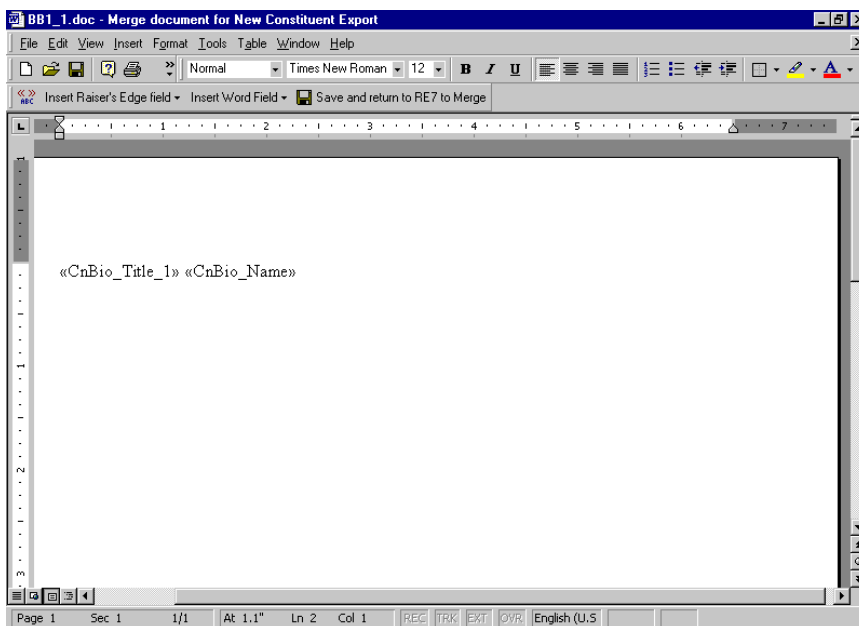
**Note:** You can enter a date in your Microsoft *Word* merge document that automatically updates. From the menu bar select **Insert, Date and Time**. Select the date format you want to use.

- Once you select your merge fields, click **Edit merge document** on the toolbar. Microsoft *Word* opens, and a blank Merge document appears.



As you compose your merge document, you are going to insert merge fields into the letter. When you print the letter, the correct information is exported out of *The Raiser's Edge* and appears in the designated areas (placeholders) of your letter.

- You first want to enter merge fields for Clara's name and address block on the letter. Leaving your cursor flashing in the left corner of the work space of your letter, click **Insert Raiser's Edge field** on the toolbar. Select **Biographical, Title 1**. Press the space bar on your keyboard. On the toolbar, click **Insert Raiser's Edge field** again. Select **Biographical, Name**.



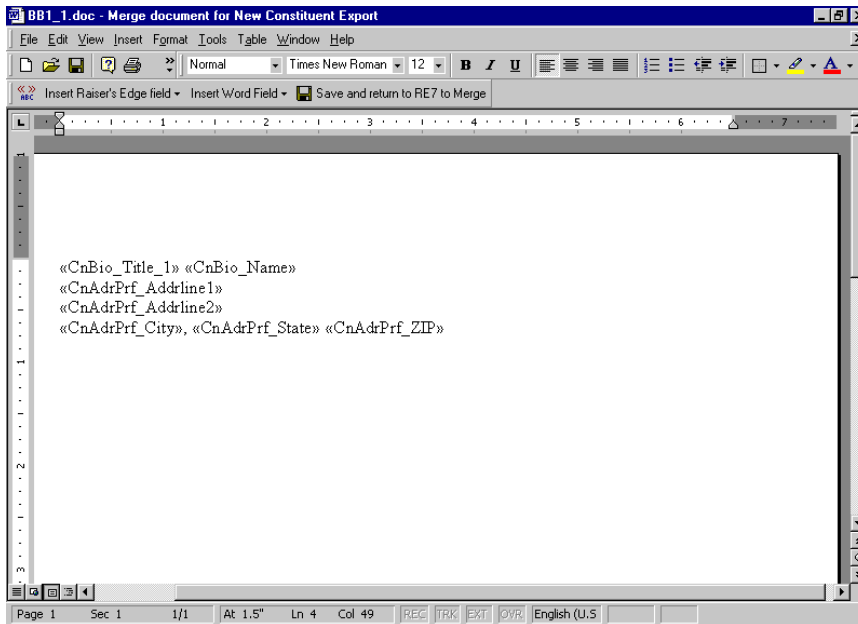
- To move down to the next line, press **ENTER** on your keyboard. On the toolbar, click **Insert Raiser's Edge field** and select **Address, Preferred Address, Address line 1**. Press **ENTER** on your keyboard and click **Insert Raiser's Edge field** again. Select **Address, Preferred Address, Address line 2**.

12. To move to the next line, press **ENTER** on your keyboard. On the toolbar, click **Insert Raiser's Edge field** and select **Address, Preferred Address, City**. Type a comma immediately afterward. Press the space bar on your keyboard.

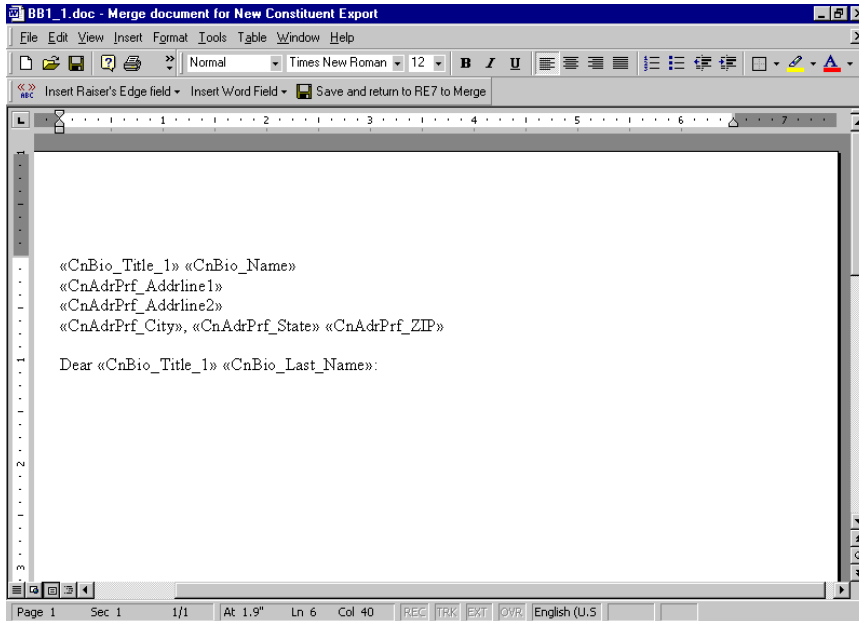
On the toolbar, click **Insert Raiser's Edge field** and select **Address, Preferred Address, State**. Press the space bar on your keyboard. Click **Insert Raiser's Edge field** again and select **Address, Preferred Address, ZIP**.

When you run the letter, the address block for Clara appears on your letter as follows.

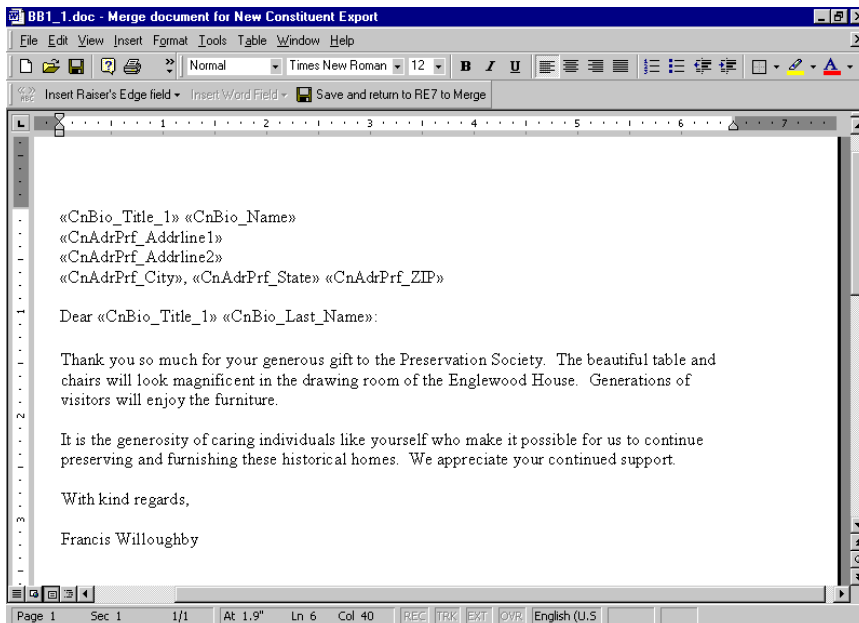
Mrs. Clara M. Daniels  
48 Farmridge Road  
Danbury, CT 06810



- You now want to enter merge fields for the salutation of the letter. Move down and type "Dear", the greeting of your letter. Press the space bar on your keyboard. On the toolbar, click **Insert Raiser's Edge field**. Select **Biographical, Title 1**. Press the space bar on your keyboard. On the toolbar, click **Insert Raiser's Edge field**. Select **Biographical, Last Name**. Type a colon at the end of the line.



- Move down, and compose the body and closing of your letter.



- On the toolbar, click **Save and return to RE7 to Merge**. You return to the New Constituent Export screen.



16. On the toolbar, click **Save**. The Save Export As screen appears. When you save your export file, you can use it with future letters.

The screenshot shows a 'Save Export As' dialog box with the following details:

- Export name:** Gift-in-Kind
- Description:** Letter sent to Gift-in-Kind donors.
- Export type:** Constituent
- Other users may run this export
- Other users may modify this export
- Buttons: Save, Cancel

**Note:** If you want other users to be able to run or modify this export, mark the appropriate checkbox.

17. Enter an **Export name** and **Description** for your export and click **Save**. You return once again to the New Constituent Export screen. The title on the screen changes to the export name you just entered.
- For more information about creating exports in *The Raiser's Edge*, see the Export chapter of the *Query & Export Guide*.

**Note:** On the Letter screen, you can make a letter inactive by marking the **Letter is inactive** checkbox. The letter becomes inactive throughout *The Raiser's Edge*, and will also appear inactive on the Letters page, accessed from the **Letters** link of *Configuration*.

18. To close the Constituent Export screen, click the "X" in the top right corner. You return to the New Letter screen.

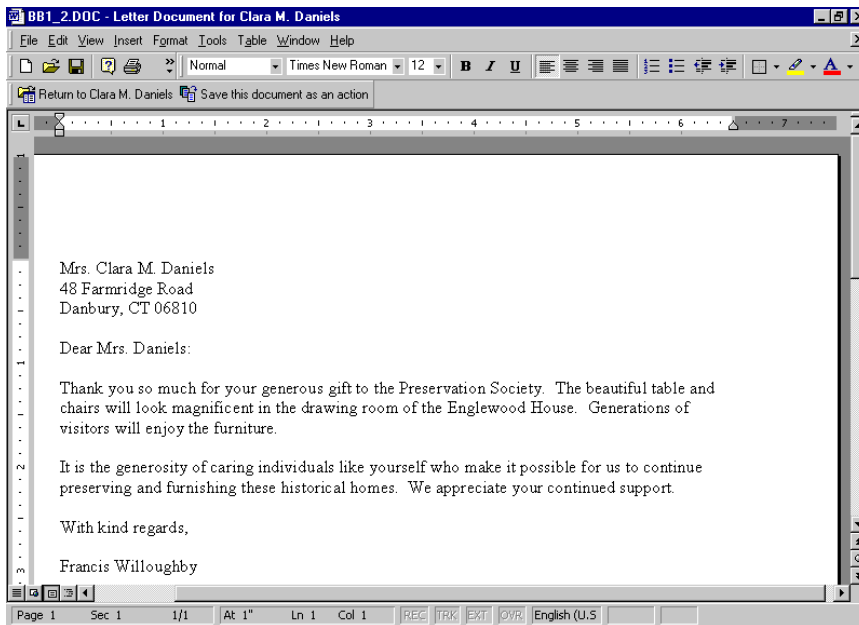
The screenshot shows a 'New Letter' dialog box with the following details:

- Letter description:** Gift-in-Kind
- Blackbaud Word Merge export:** Gift-in-Kind
- Letter is inactive
- Buttons: Save and Close, Edit Export

19. On the toolbar, click **Save and Close**. You return to Clara's constituent record.

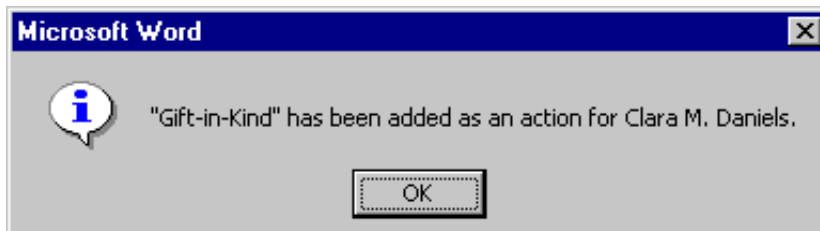
When you create a new letter, the letter appears on the **Letter** menu of all your constituent records and on the Letters page, accessed from the **Letters** link of *Configuration*.

- From the menu bar of Clara’s constituent record, select **Letter, Gift-in-Kind**. Your Gift-in-Kind *Word* document appears for Clara. The merge is complete. You can now edit or add to the letter, as needed.



**Note:** You can print the letter by selecting **File, Print** from the *Word* menu bar.

- You can save the letter document as an action. On the toolbar, click **Save this document as an action**. If, in Business Rules, under **Constituent options, General options**, you marked the **Display notification when an action is saved** checkbox, a message appears, letting you know the action has been added.



The letter appears as an action on the Actions tab of the constituent’s record. To view the action, you must select the Actions tab of the constituent record, and open the action. The **Category** of the action is **Mailing**. The **Type** remains blank unless you have a business rule set up to add a type. To access the letter from the action record itself, click the *Microsoft Word* icon in the bottom right status bar. For more information about actions, see “Actions” on page 229. For more information about setting up business rules, see the *Security & Configuration Guide*.

- On the message, click **OK**. You return to the Gift-in-Kind *Word* document.
- Once you print the letter, click **Return to Clara M. Daniels** on the toolbar. You return to the constituent record, and the letter is saved.
- On the toolbar of Clara’s constituent record, click **Save and Close**.

► **Editing merge field information from the Letter menu of a constituent record**

**Warning:** Microsoft *Word* integration appears on your computer only if *Word 2000* or above is installed.

From the **Letter** menu of a constituent record, you can add, change, or delete the constituent record merge fields selected for a mail merge. For more information about editing letters from the Letters page, accessed from the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

**Scenario:** The format of the letter you send out for gifts-in-kind is too formal. In the salutation of the letter, you decide to address the recipient of the letter by first name. Originally, the merge document was set up to address the recipient by a title and last name. From a constituent record, change the merge fields.

**Tip:** You can also click the down arrow beside the **Word** button on the toolbar to edit a letter.

1. From the menu bar of a constituent record, select **Letter, Modify Letter Menu**. For more information about opening a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows the 'Clara M. Daniels' constituent record interface. The 'Letter' menu is open, and the 'Modify Letter Menu...' option is highlighted. The interface includes the following sections:

- Biographical:** Last name: Daniels, First name: Clara, Middle name: Myrtle, Titles: Mrs., Suffixes: , Nickname: , Maiden name: Prosser, ID: 194, Gender: Female, SSN: 011-00-9875, Birth date: 12/30/1915, Age: 89, Deceased? (checkbox), Date: , Marital status: Widowed, Spouse: Jesse E. Daniels, Solicit code: Do not phone on week-ends; Do not call after 9:0
- Letter Menu:** Gift-in-Kind, Individual Letter, Org Letter, Constituent Welcome Letter, Brochure Letter, President's Letter, New Membership Welcome, Appointment Reminder, Create a New Letter Format, **Modify Letter Menu...**
- Preferred Address:** Home, Country: United States, Address lines: 48 Farmridge Road, City: Danbury, State: CT, Connecticut, ZIP: 06810, DPC:
- Phones/Email/Links:**

DNC	Type	Number/Email Address	Shared?
	Home	203-555-2523	Shared
- This constituent:**
  - Is inactive
  - Is a solicitor
  - Gives anonymously
  - Has no valid addresses
  - Requests no email
- Buttons:** Education, Business, Bank

**Note:** Selecting a letter on the Modify Letter Menu screen enables the buttons on the right.

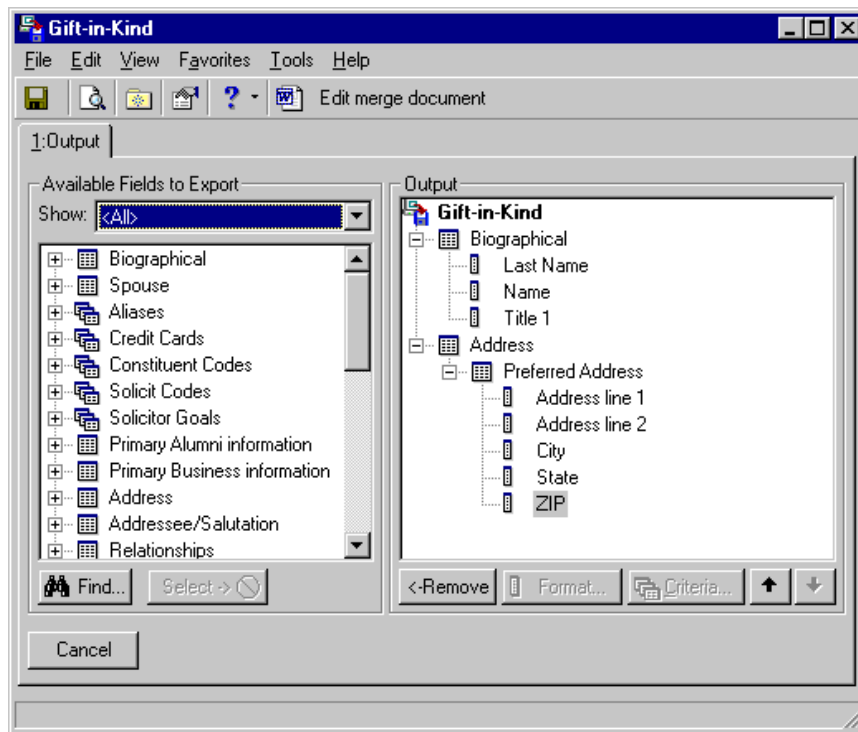
The Modify Letter Menu screen appears.



2. Select "Gift-in-Kind", and click **Open**. The Gift-in-Kind letter screen appears.

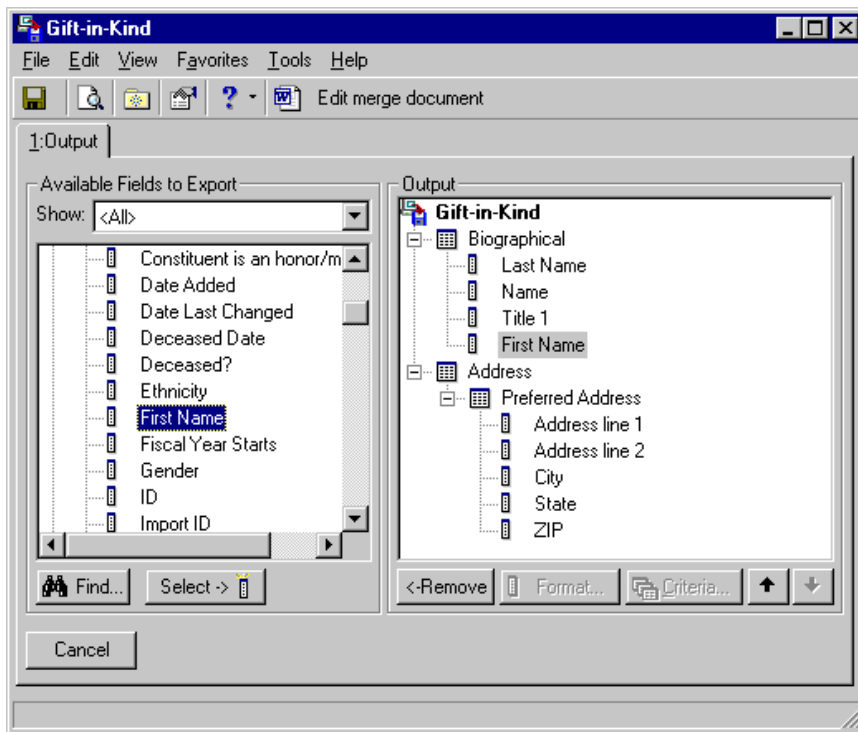


3. Click **Edit Export**. The Gift-in-Kind export screen appears. On this screen, you need to add the **First Name** merge field to use in your letter.

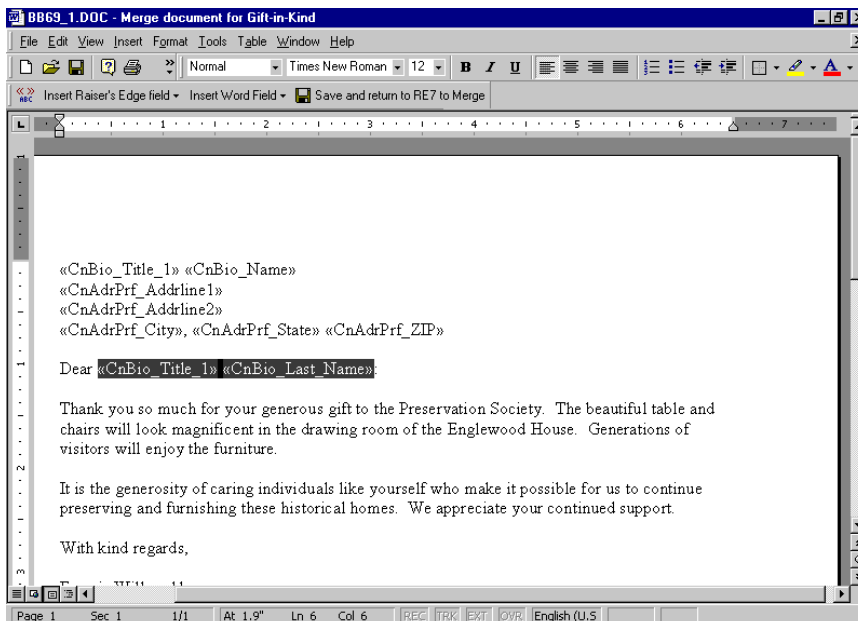


**Note:** You can modify the text of a merge document the same way. On the toolbar, click **Edit merge document**. Microsoft *Word* opens, and the merge document appears. You can delete, add, or replace any of the original text in the body or closing of the letter at this time. When finished, click **Save and return to RE7 to Merge** on the toolbar. Continue to follow the rest of this procedure.

- In the **Available Fields to Export** box on the left, click the plus sign to the left of the Biographical category. Scroll down and double-click **First Name**. **First Name** appears in the **Output** box on the right.



- On the toolbar, click **Edit merge document**. Microsoft Word opens and the merge document appears.



- In the salutation (greeting) of your letter, highlight <<CnBio\_Title\_1>> <<CnBio\_Last\_Name>> and press **DELETE** on your keyboard.
- Press the space bar on your keyboard. On the toolbar, click **Insert Raiser's Edge field**. Select **Biographical**, **First Name**. The salutation of your letter will now read Dear Clara, for example, instead of the original Dear Mrs. Daniels.
- On the toolbar, click **Save and return to RE7 to Merge**. You return to the Gift-in-Kind export screen.

9. On the toolbar, click **Save** and then, click the “X” in the right top corner. You return to the Gift-in-Kind letter screen.
10. On the toolbar, click **Save and Close**. You return to the Modify Letter Menu screen.
11. Click **Close**. You return to the constituent record.
12. On the toolbar, click **Save and Close**.

► **Quickly writing a letter from the Letter menu of a constituent record**

**Warning:** Microsoft *Word* integration appears on your computer only if *Word 2000* or above is installed.

From an individual or organization constituent record, you can quickly connect to Microsoft *Word* to write a letter. From the **Letter** menu, select **Write a Letter**. A *Word* document appears, with certain fields defaulting into the letter. The Long Date (a *Windows* setting), Primary Addressee, Preferred Address, and Primary Salutation automatically appear in your letter.

1. From the menu bar of a constituent record, select **Letter, Write a Letter**. For more information about opening a constituent record, see “Access Constituent Records” on page 4.

The screenshot shows the 'AAA Concrete' software interface. The 'Letter' menu is open, and 'Write a Letter...' is selected. The main window displays constituent information for 'AAA Concrete' and matching gift settings.

**Constituent Information:**

- Org Name: AAA Concrete
- ID: 163
- Preferred Address: Business
- Country: United States
- Address lines: 48 Island Lake
- City: Pahoa
- State: HI
- ZIP: 78741

**Matching Gift Information:**

- Organization matches gifts:
- Factor: 2.00
- Fiscal year starts: 01/01

	Minimum	Maximum
Per gift	\$50.00	\$5,000.00
Annual per donor	\$50.00	\$60,000.00
Total per donor	\$50.00	\$100,000.00

**Notes:**

AAA Concrete will match only for full-time employees.

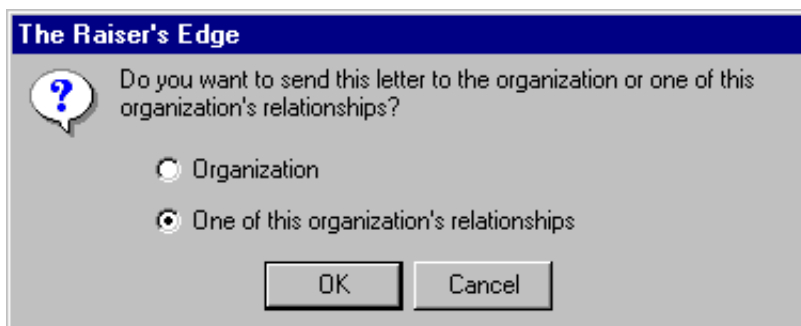
**This constituent:**

- Is inactive
- Gives anonymously
- Requests no email
- Is a solicitor
- Has no valid addresses

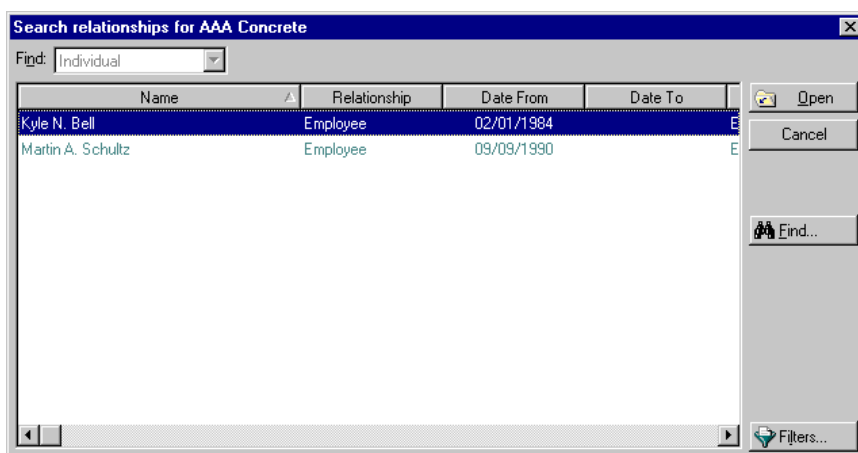
Friend (04/01/2003 - ); Matching Gift Company (04/01/2003 - )

**Tip:** You can also click the **Word** button on the toolbar to quickly write a letter.

If the constituent record from which you are writing the letter is an organization, a message appears, asking if you want to send the letter to the organization or to a relationship of the organization.



- If you choose to send the letter to **One of the organization's relationships**, the Search relationships screen appears, so you can select the contact to whom to send the letter. If you choose to send the letter to the **Organization**, this screen does not appear, and the letter is addressed to the constituent itself.

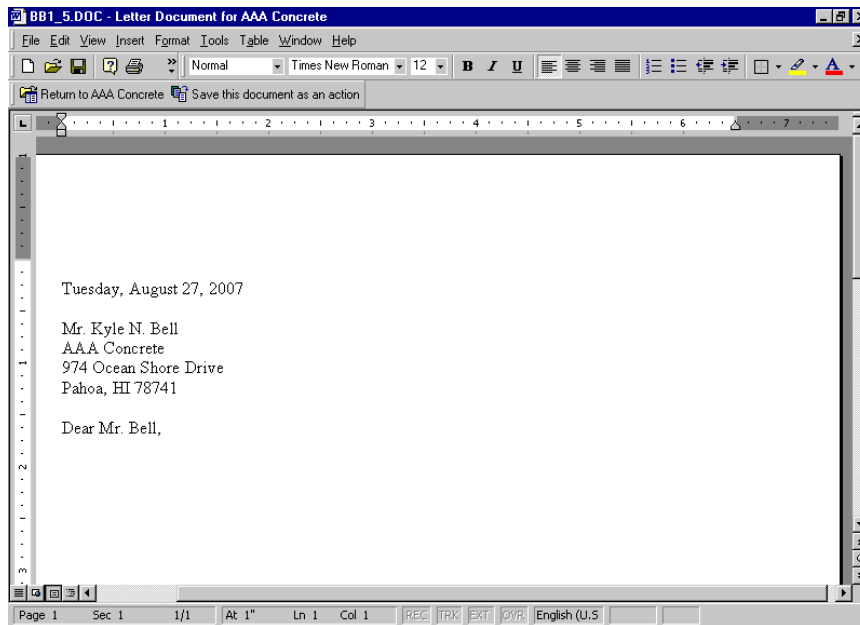


- Select a contact name in the grid and click **Open**.  
The *Word* document appears. The merge is complete. You can now continue to write and print your letter.

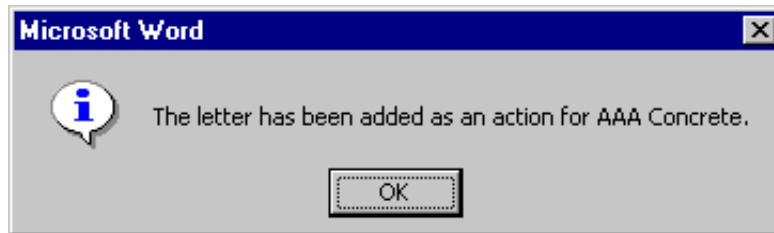
**Note:** You can print the letter by selecting **File, Print** from the *Word* menu bar.



If the constituent record from which you are creating the letter is an individual, once you select **Letter, Write a Letter** from the menu bar, the *Word* document appears.



4. You can save the letter document as an action. On the toolbar, click **Save this document as an action**. If, in Business Rules, under **Constituent options, General options**, you marked the **Display notification when an action is saved** checkbox, a message appears, letting you know the action has been added.



The letter appears as an action on the Actions tab of the constituent's record. To view the action, you must select the Actions tab of the constituent record, and open the action. The **Category** of the action is **Mailing**. The **Type** remains blank unless you have a business rule set up to add a type. To access the letter from the action record itself, click the *Microsoft Word* icon in the bottom right status bar. For more information about actions, see "Actions" on page 229. For more information about setting up business rules, see the *Security & Configuration Guide*.

5. On the message, click **OK**. You return to the *Word* document.
6. Once you print the letter, click **Return to [Constituent Name]** on the toolbar. You return to the constituent record.
7. On the toolbar, click **Save and Close**.

► **Removing a letter from the Letter menu of a constituent record**

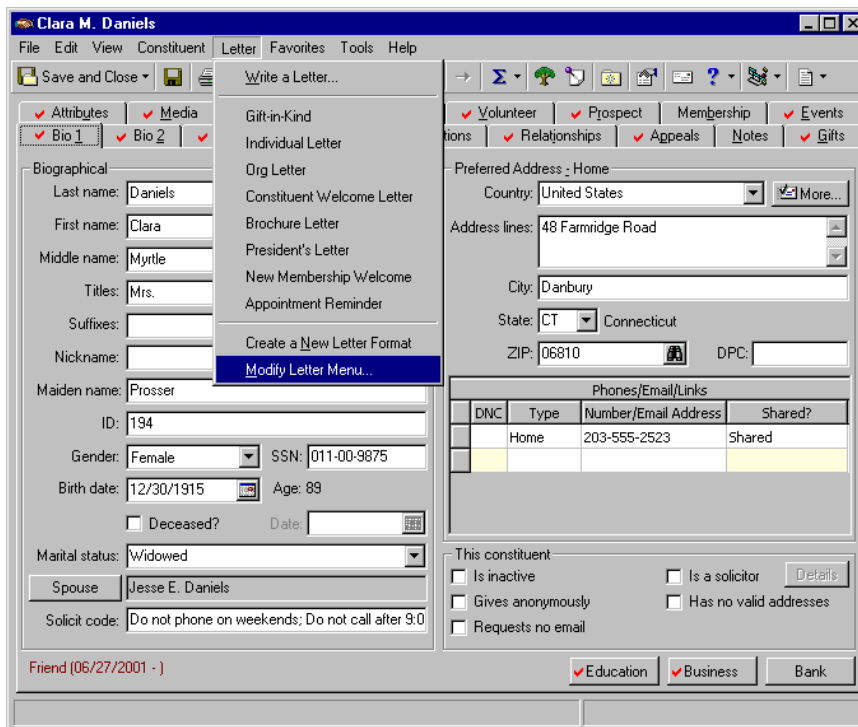
**Warning:** Microsoft *Word* integration appears on your computer only if *Word 2000* or above is installed.

When you remove a letter from the constituent record **Letter** menu, you are not deleting the letter from the Letters page, accessed from the **Letters** link of *Configuration*. You are simply removing it from the **Letter** menu. To delete a letter from you database, you must go to the Letters page of *Configuration* and delete the letter there.

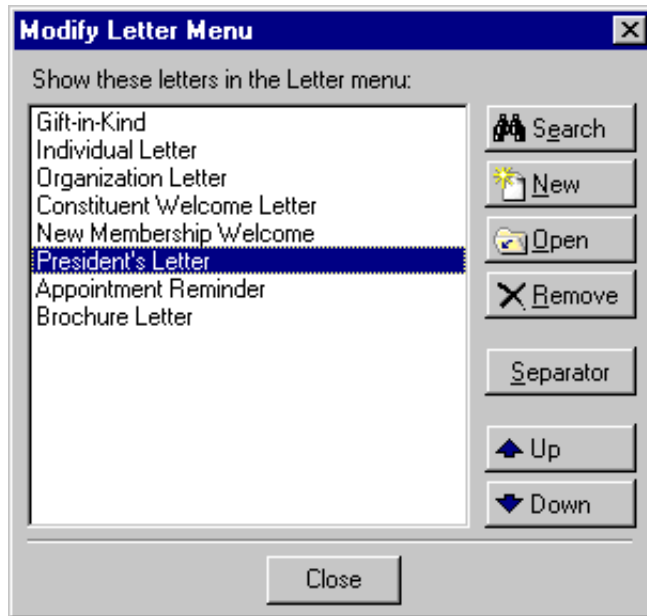
**Scenario:** Your organization no longer uses the President’s Letter. From the **Letter** menu of a constituent record, remove this letter.

**Tip:** You can also click the down arrow beside the **Word** button on the toolbar to remove a letter from the **Letter** menu.

1. From the menu bar of a constituent record, select **Letter, Modify Letter Menu**. For more information about opening a constituent record, see “Access Constituent Records” on page 4.



The Modify Letter Menu screen appears.



**Note:** To permanently delete a letter from your database, you must go to the **Letters** link of *Configuration*.

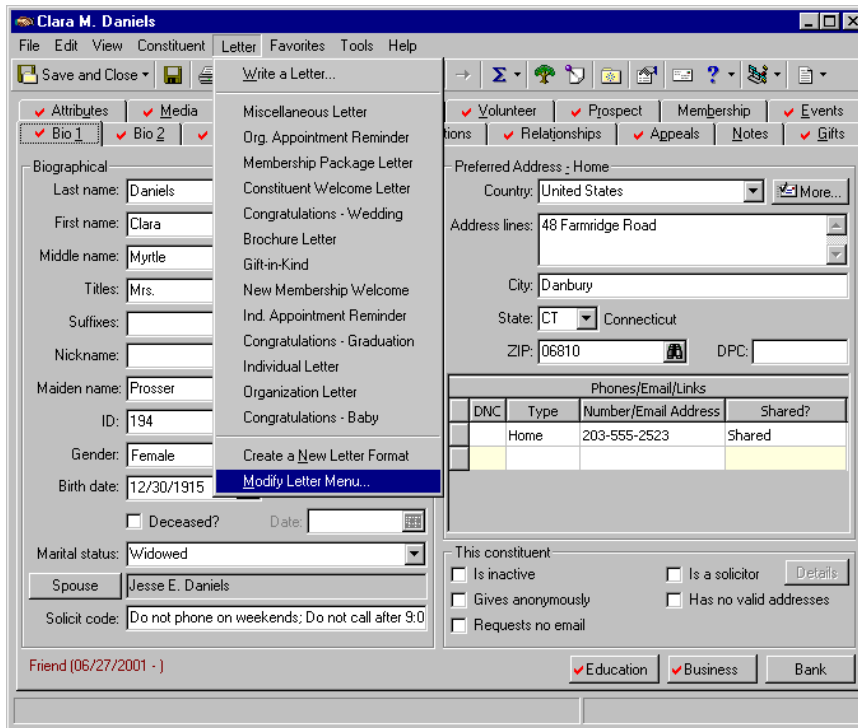
2. Select the “President’s Letter” and click **Remove**. The President’s Letter no longer appears. It is not permanently removed from your database, just from the **Letter** menu.
3. Click **Close**. You return to the constituent record.
4. On the toolbar, click **Save and Close**.

► **Organizing the Letter menu of a constituent record**

For your convenience, you can organize the **Letter** menu of a constituent record. You can move the letters up or down, group categories of letters together, and divide one group from another by using separators. All letters that appear on the **Letter** menu also appear on the Letters page, accessed from the **Letters** link of *Configuration*. Organizing them on the **Letter** menu does not organize them on the Letters page. For more information about the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

**Tip:** You can also click the down arrow beside the **Word** button on the toolbar to organize the **Letter** menu.

1. From the menu bar of a constituent record, select **Letter, Modify Letter Menu**. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



The Modify Letter Menu screen appears.



2. Select a letter in the list (for example, a congratulations letter) and click the **Up** or **Down** buttons to move the letter above or below the next similar letter in the list.

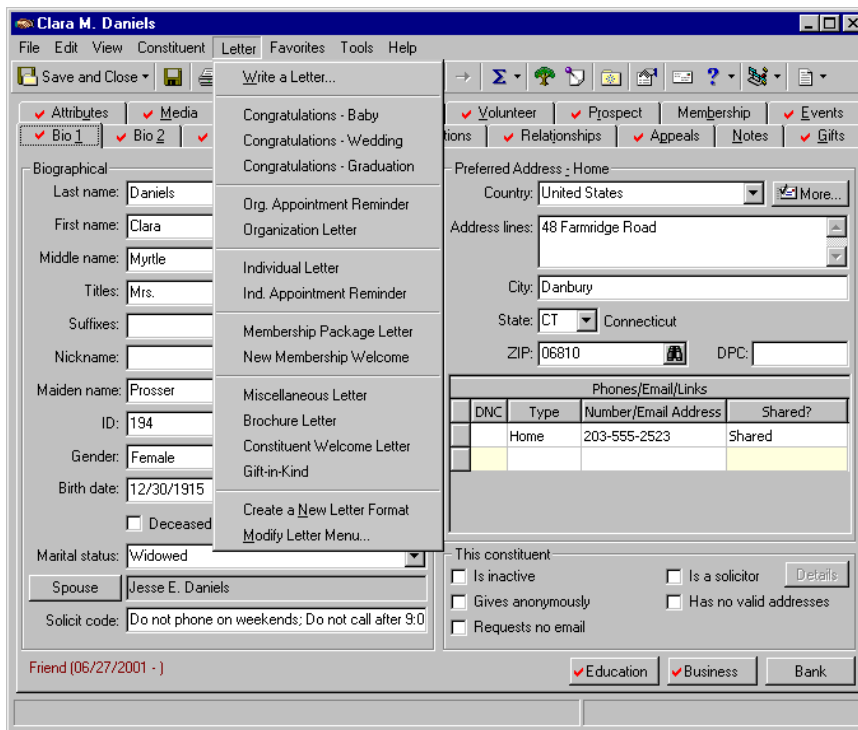


3. Continue to move similar letters up and down until all letters are grouped together by specific type. For example, after you group your congratulation letters, you decide to group your membership, individual, organization, and miscellaneous letters.
4. To separate each group, select the last letter of each letter group and click **Separator**. A hyphen appears below the selected letter.



5. Click **Close**. You return to the constituent record.

- From the menu bar, select **Letter**. The menu appears neater and more organized. Where you placed a hyphen, a line appears, separating the letter types.



- On the toolbar, click **Save and Close**.

## Converting Record Types

**Warning:** If a record is integrated between *The Raiser's Edge* and *The Education Edge*, the option to convert record types is disabled.

*The Raiser's Edge* gives you the ability to convert an individual constituent record to an organization constituent record, and an organization constituent record to an individual constituent record. This feature is invaluable after a conversion from another software program, a conversion from an earlier version of *The Raiser's Edge*, an import from another database, or a data entry error. This functionality saves you a tremendous amount of time because it keeps you from having to create a new record and manually reenter a constituent's information.

### Individual to Organization

The reasons for converting an individual constituent record to an organization constituent record are many. The procedure is simple, but it is important you know what happens to your data in the process and afterwards. Because of the many different fields and functions of an individual and organization record, some situations prevent a conversion from taking place, and other situations make it impossible for certain pieces of data to convert.

If an individual constituent record has an Academy ID, it cannot convert to an organization constituent record. An Academy ID indicates the record exists in Blackbaud's *Academy*, as well as *The Raiser's Edge*. If an individual constituent record has event participation information, it cannot convert to an organization constituent record. Even though these situations prevent *The Raiser's Edge* from automatically converting the record, you can still create a new organization record and manually enter the information.

Two pieces of data cannot convert from an individual constituent record to an organization constituent record because these fields do not exist on organization records. They are **Spouse** and **Education**. If an individual constituent record has a spouse individual relationship (where the **This individual is the Spouse** checkbox is marked on the General 1 tab of the relationship record), the spouse individual relationship record converts to the organization constituent record as a regular individual relationship record, because organizations cannot have a spouse. If the individual constituent record has any education relationships, they cannot convert because education is not an available field on an organization constituent record. You receive a warning message referencing these fields when you attempt to convert. The message asks if you are sure you want to proceed. If you click **No**, you remain on the individual record and nothing changes. If you click **Yes**, the record converts, minus the spouse and education data.

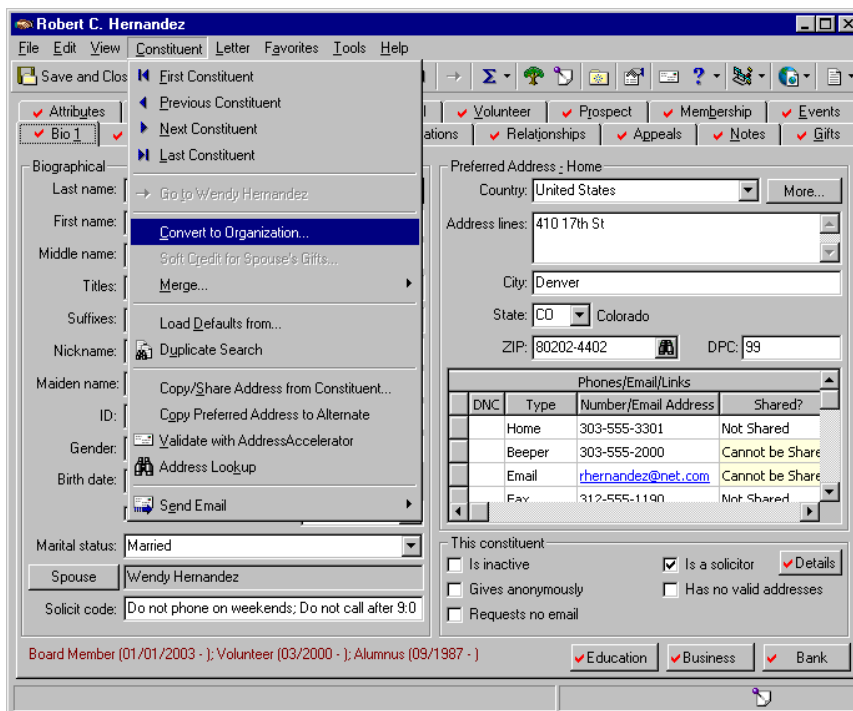
Once you decide you are ready to convert an individual constituent record to an organization constituent record, a few additional pieces of data must be considered. Although most information is retained during the conversion process, because of the differences between the two record types, data is stored in alternate places once converted to an organization record. The key name (first name, middle initial, last name) becomes the **Org name**, and the majority of the individual biographical fields are converted into a notepad. For fields that do not exist on an organization record, *The Raiser's Edge* creates a notepad to retain this information. The notepad **Type** is Conversion notes; **Date** is the conversion date; **Title** is Conversion title; **Description** is Conversion description; and the actual note lists the field name, if it contained individual data, along with the data it did contain. This situation applies to **First name, Middle name, Titles, Suffixes, Nickname, Maiden name, Gender, SSN, Birth date, Marital status, Ethnicity, Religion, Birthplace, Deceased**, and deceased **Date**. A notepad is always created with the conversion.

### ► Converting an individual record to an organization record

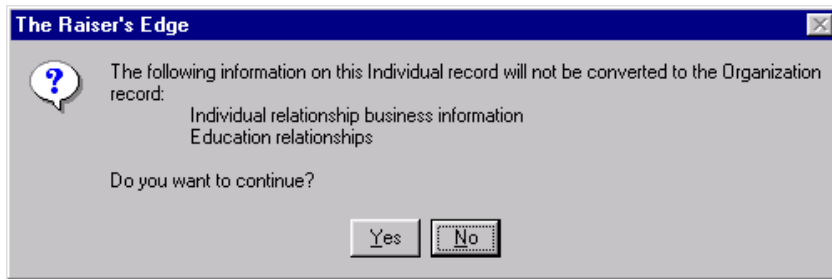
**Warning:** Before you convert a record in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

*The Raiser's Edge* gives you the ability to convert an individual record to an organization record. This functionality saves you a tremendous amount of time because it keeps you from having to create a new record and manually reenter a constituent's information.

1. From an individual constituent record, select **Constituent, Convert to Organization** from the menu bar. For more information about opening a constituent record, see "Access Constituent Records" on page 4.



2. You may receive a warning message, notifying you that the individual record itself cannot convert, with a statement explaining why. If you receive a message like this, click **OK**. You return to the constituent record. Even though a situation may prevent *The Raiser's Edge* from automatically converting the record, you can still create a new organization record and manually enter the information.
3. You may receive a message stating that particular information cannot convert, and asking you if you want to continue.



To continue, click **Yes**.

4. You may receive a message asking if you want to save before proceeding. Click **Yes**. The individual record is converted into an organization record.
5. On the toolbar, click **Save and Close**.

## Organization to Individual

The reasons for converting an organization constituent record to an individual constituent record are many, and the procedure is simple. It is important you know what happens to your data in the process and afterwards. Because of the many different fields and functions of an individual and organization record, some scenarios prevent a conversion from taking place, and other situations make it impossible for certain pieces of data to convert.

Three situations prevent an organization constituent record from converting to an individual constituent record. If the organization record has matching gifts; if the organization record is marked as the “primary business” for any other record; or if the organization record has any event participation information, it cannot convert. Even though these situations prevent *The Raiser's Edge* from automatically converting the records, you can still create a new organization constituent record and manually enter the information.

If an organization constituent record has an ID number assigned by *MatchFinder*, this piece of information cannot convert. You receive a warning message referencing this field when you attempt to convert. The message asks if you are sure you want to proceed. If you click **No**, you remain on the organization record and nothing changes. If you click **Yes**, the record converts, minus the *MatchFinder* ID.

Once you decide you are ready to convert an organization constituent record to an individual constituent record, a few additional pieces of data must be considered. Although most information is retained during the conversion process, because of the differences between the two record types, data is stored in alternate places once converted to an individual record. **Org name** becomes **Last name**, and the majority of the organizational biographical fields are converted into a notepad. For fields that do not exist on an individual record, *The Raiser's Edge* creates a notepad to retain this information. The notepad **Type** is Conversion notes; the **Date** is the conversion date; the **Title** is Conversion title; **Description** is Conversion description; and the actual note lists the field name, if it contained organizational data, along with the data it did contain. This scenario applies to **Industry**, **Parent corp**, **No. employees**, **No. subsidiaries**, and all matching gift information, which includes **Organization matches gifts**, **Factor**, **Fiscal year starts**, **Matching Gift Limits**, and matching **Notes**. A notepad is always created with the conversion.

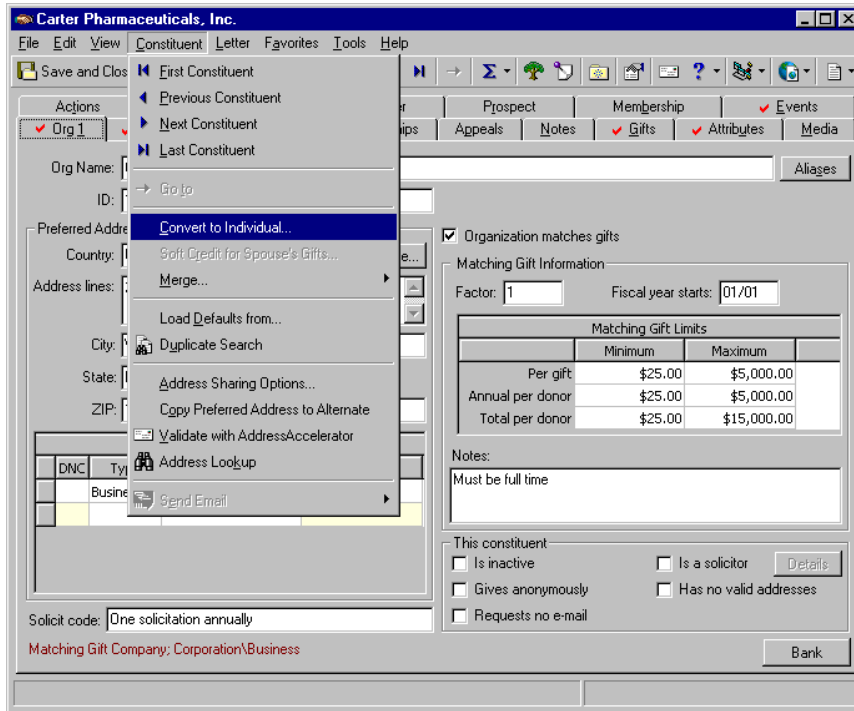
### ► Converting an organization record to an individual record

**Warning:** Before you convert a record in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

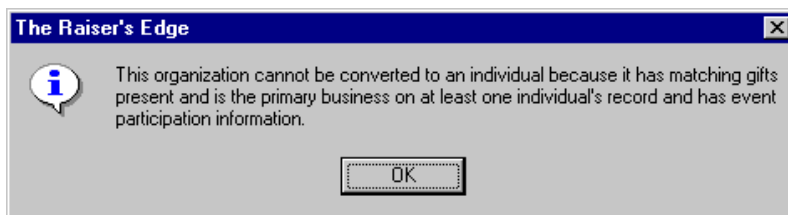


*The Raiser's Edge* gives you the ability to convert an organization record to an individual record. This functionality saves you a tremendous amount of time because it keeps you from having to create a new record and manually reenter a constituent's information.

1. From an organization constituent record, select **Constituent, Convert to Individual** from the menu bar. For more information about opening a constituent record, see "Access Constituent Records" on page 4.

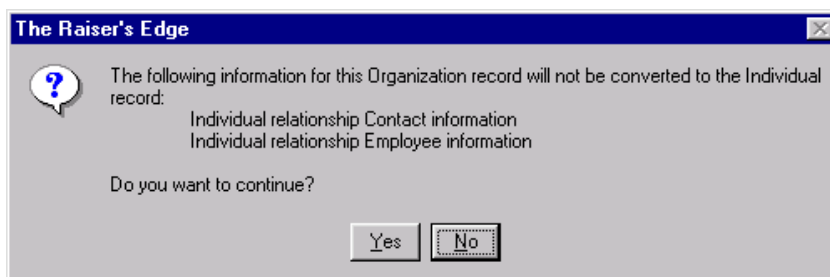


2. You may receive a warning message, notifying you that the organization constituent record itself cannot convert, with a statement explaining why.



If you receive a message like this, click **OK**. You return to the organization constituent record. Even though a situation may prevent *The Raiser's Edge* from automatically converting the record, you can still create a new individual record and manually enter the information.

3. You may receive a message stating that particular information cannot convert, and asking if you want to continue.



To continue, click **Yes**.

4. You may receive a message asking if you want to save before proceeding. Click **Yes**. The organization record is converted to an individual record.
5. On the toolbar, click **Save and Close**.

## Merging Constituent Records

You can merge constituent records from *Administration*. On the Administration page, you can use the **Merge Constituents** link to move or copy the selected contents of one constituent record into another. You must be working with the same constituent record type — individual or organization — to use this link. For example, if you try to merge an organization record with an individual record, *The Raiser's Edge* generates an error message, reminding you the records must be the same type.

You can also merge constituent records from the menu bar of a constituent record. From the menu bar of an open constituent record, select **Constituent, Merge**. You can then select to merge the contents from the constituent record you have open to another constituent record (**Merge from [Constituent Record] into...**) or merge another constituent record into the constituent record you have open (**Merge a constituent into [Constituent Record]**).

*The Raiser's Edge* merges constituent records on a one-to-one basis. For example, you can merge Fred Smith with Frederick Smith; but you cannot merge Fred Smith with Frederick Smith, Mary Smith, and F. Smith, all at the same time. You must perform a separate merge for each constituent record you want to merge with Fred Smith's constituent record.

**Tip:** Not only can you merge two individuals or organizations who are duplicates, you can also merge an individual constituent into a spouse's constituent record, if the individual passes away. This way, you can keep all the deceased's information on the spouse's constituent record.

You select the information you want to merge. For example, you may need to merge information from only the Gifts tab of one constituent record onto the Gifts tab of another record. Or, you may decide to merge all information contained in one constituent record to another constituent record. Once the merge is complete, you can delete the source constituent record, permanently removing it from your database.

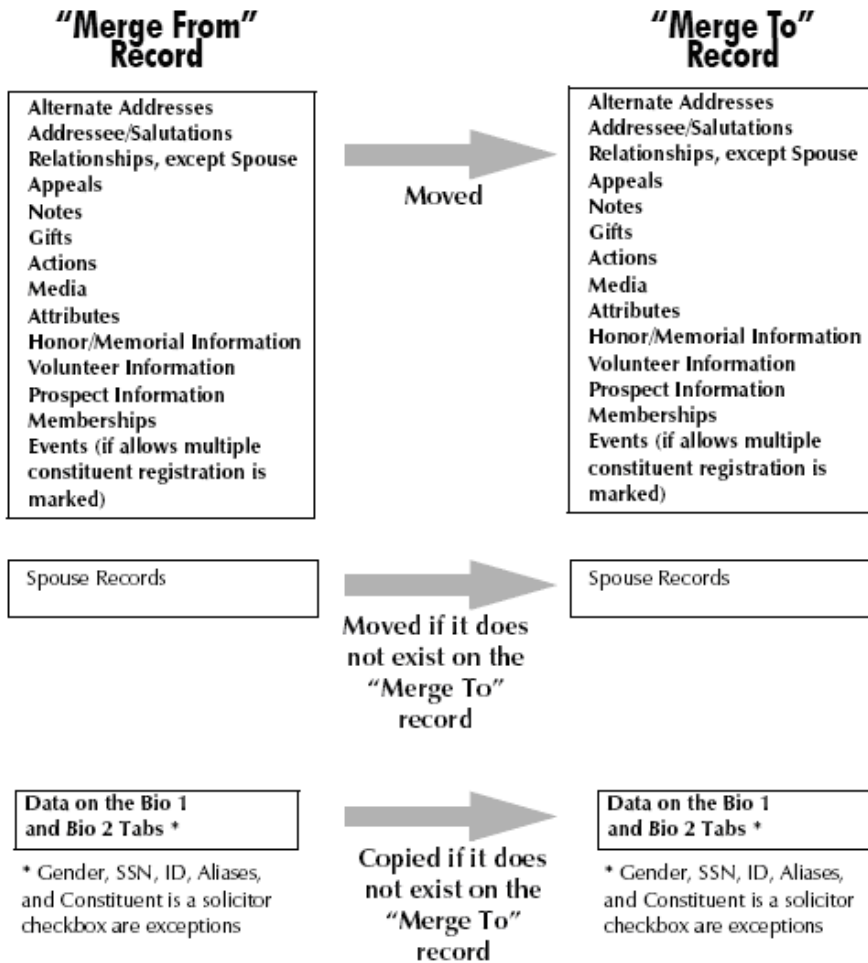
You should analyze your duplicate constituent records carefully before you merge the records to make sure you need to merge the records.

## How Data Is Merged

Data from one constituent record (**Merge From**) merges into another constituent record (**Merge To**) in three ways.

- Copied - The data on the **Merge From** record is copied to the **Merge To** record, and the program does not check for data duplications. For example, all education records are copied to the **Merge To** record, regardless of whether they already exist.
- Copied if it does not exist on the **Merge To** record - The data on the **Merge From** record is copied to the **Merge To** record only if it does not exist on the **Merge To** record; for example, a middle name. This happens because data on the **Merge To** record has precedence and is not overwritten.

- Moved - The data on the **Merge From** record is moved to the **Merge To** record. Data is copied from the **Merge From** record and moved to the **Merge To** record, then deleted from the **Merge From** record. This happens when the program cannot store the same value twice; such as with gifts and appeals.



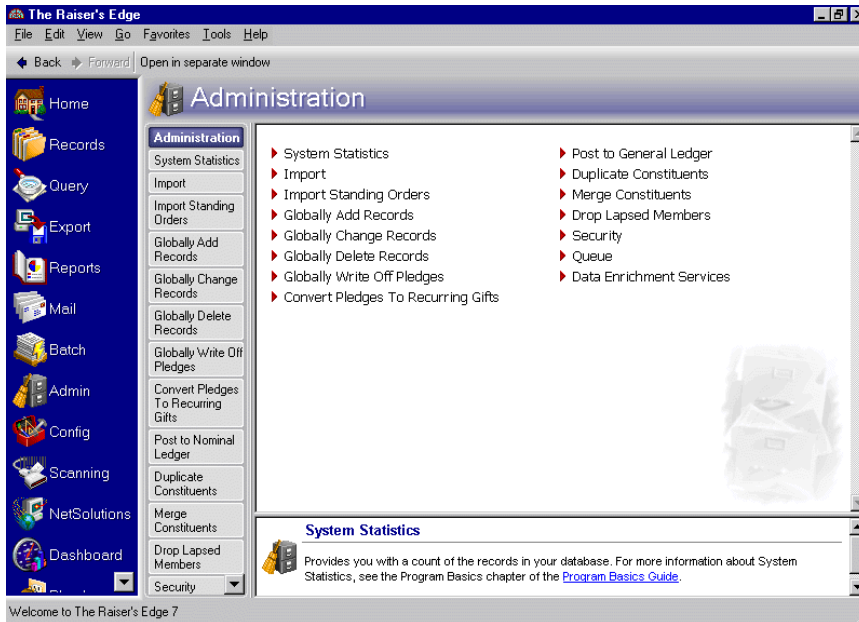
Keep in mind that Preferred Address fields do not merge as part of this process.

► **Merging two constituent records**

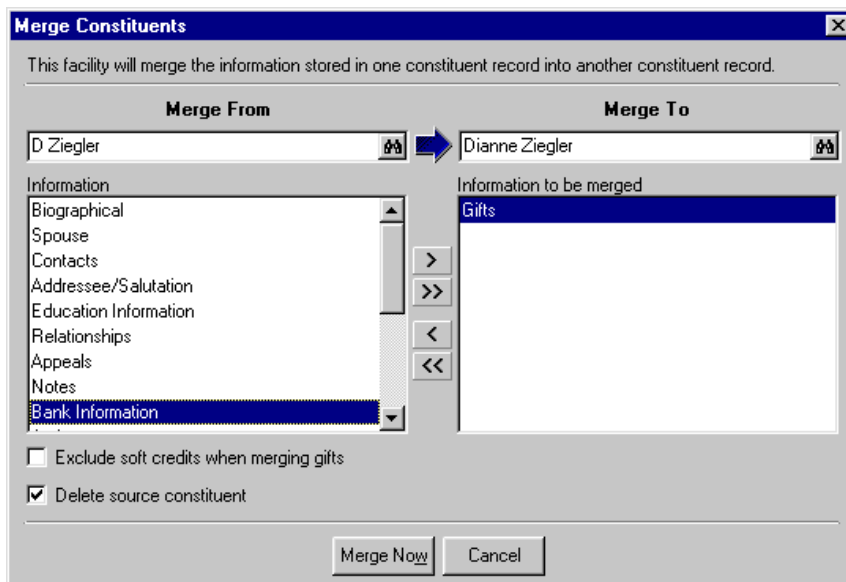
This procedure shows you how to merge two constituent records from *Administration*. You can also merge two constituent records from the menu bar of a constituent record. The process is similar, but instead select **Constituent, Merge** from the menu bar of the constituent record. You can then select to merge the contents from the constituent record you have open to another constituent record (**Merge from [Constituent Record] into...**) or merge another constituent record into the constituent record you have open (**Merge a constituent into [Constituent Record]**).

**Warning:** To merge two constituent records, you must be working with the same record type, individual or organization.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.



2. Click **Merge Constituents**. The Merge Constituents screen appears.



3. In the **Merge From** field, enter the name of the constituent record you want to merge into the other constituent record. In the **Merge To** field, enter the name of the constituent record into which you want the information transferred. From either field, you can click the binoculars to access the Open screen to search your database for that record.
4. The **Information** box contains all information available for the merge. If the merge is between two individual records, only categories pertaining to individual records appear. If the merge is between two organization records, only categories pertaining to organization records appear.

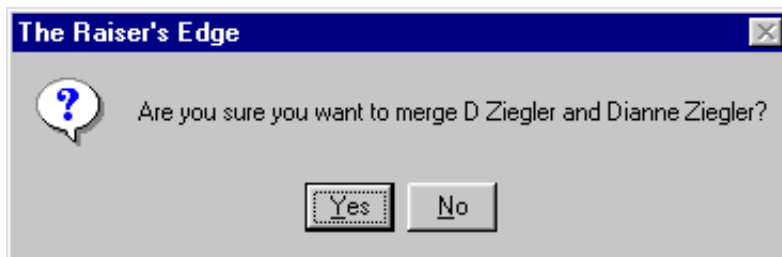
In the **Information** box, select the information you want to merge. For example, to merge only the information on the Gifts tab of the constituent records, select “Gifts” and click the single right arrow to move “Gifts” into the **Information to be merged** box. You can use the double right arrows to move all the information over. You can use the left single or double arrows to move the information out of the **Information to be merged** box and back into the **Information** box.

5. If you are merging information from the Gifts tab and you want all soft credits moved into the merged constituent record, do not mark the **Exclude soft credits when merging gifts** checkbox.

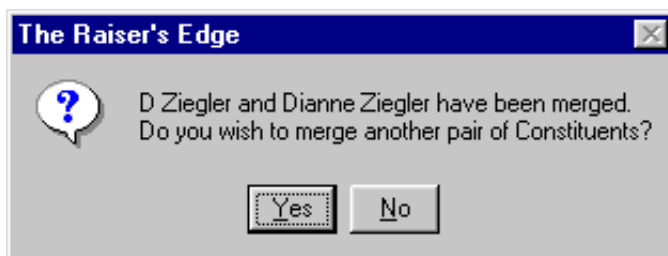
For example, you are merging the information from the Gifts tab of one constituent record into another constituent record. These two constituents are actually the same person and you intend to delete the source constituent record in the **Merge From** field once the merge is complete. Because you want the soft credits to appear on the merged record, leave this checkbox unmarked.

**Warning:** When you merge constituent records, if a constituent record is linked to an Accounts Payable vendor record, you can delete the existing link between *The Raiser's Edge* and the Accounts Payable vendor record. If the record you enter in the **Merge From** field is the one with the link to the *Accounts Payable* vendor, the link is broken.

6. If you want the constituent record entered in the **Merge From** field automatically deleted after the merge, mark the **Delete source constituent** checkbox. If you feel more comfortable deleting this record manually after the merge, or you do not want to delete the constituent record in the **Merge From** field at all, leave this checkbox unmarked.
7. To merge the two constituent records, click **Merge Now**. A warning message appears, asking if you are sure you want to merge the two records.



8. Click **Yes**. The program runs the constituent merge. A screen appears, confirming the merge and asking if you want to merge another pair of constituents.



9. To return to the Administration page, Click **No**. To merge another pair of constituent records, click **Yes**. You return to the Merge Constituents screen.

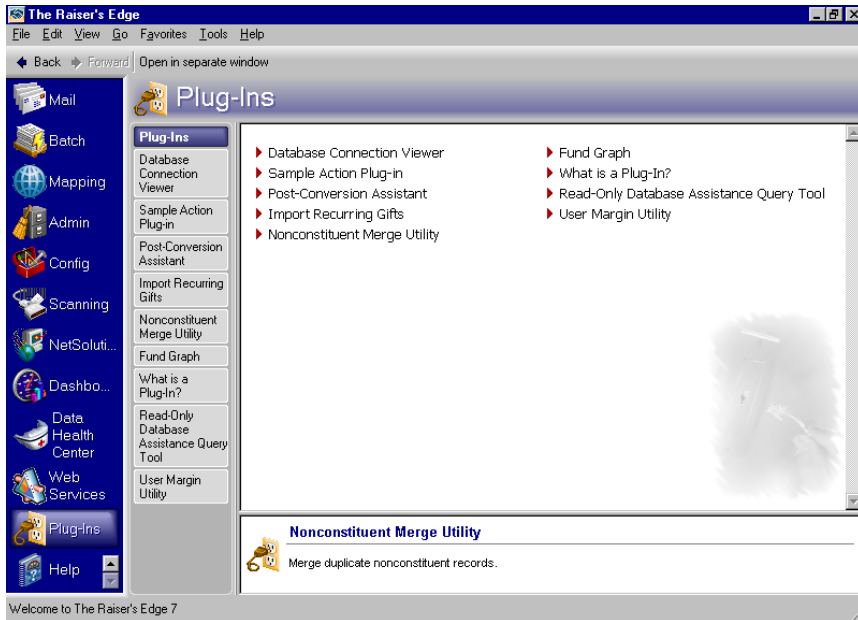
## Merging Nonconstituent Relationship Records

Nonconstituent relationships can be shared between constituents. For example, a child who is not a constituent in your database can exist as a single shared nonconstituent relationship record on both parents' constituent record Relationships tabs. Using the **Nonconstituent Merge Utility** on the Plug-Ins page, you can merge selected nonconstituent relationship records in your database and delete the source records.

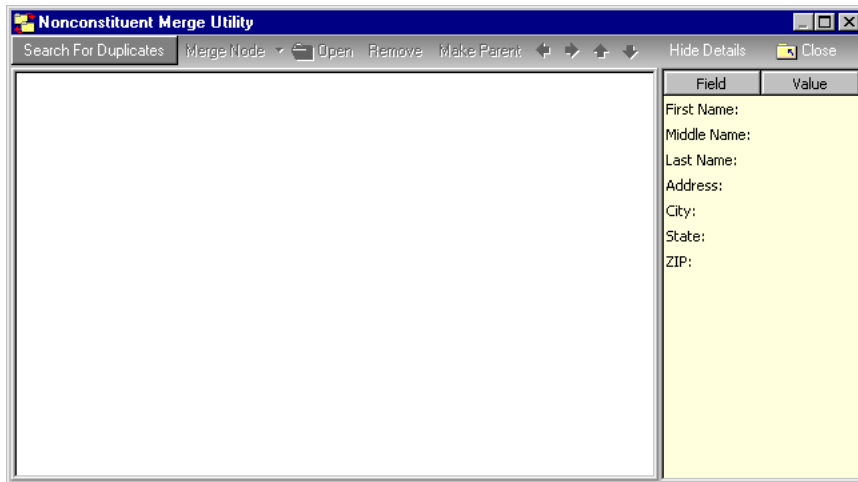
► **Merging nonconstituent relationship records**

You must have Administrator rights set up from the **Security** link of *Administration* to run the **Nonconstituent Merge Utility**.

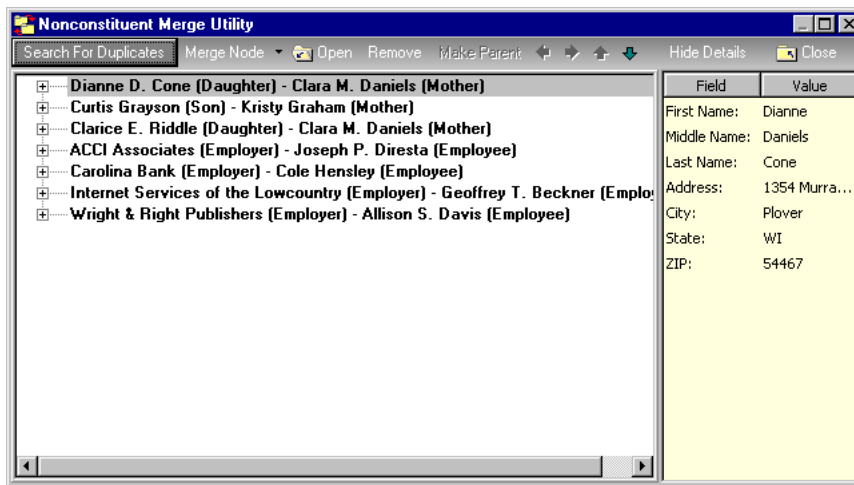
1. On the Raiser's Edge bar, click **Plug-Ins**. The Plug-Ins page appears.



2. Click **Nonconstituent Merge Utility**. The Nonconstituent Merge Utility screen appears.

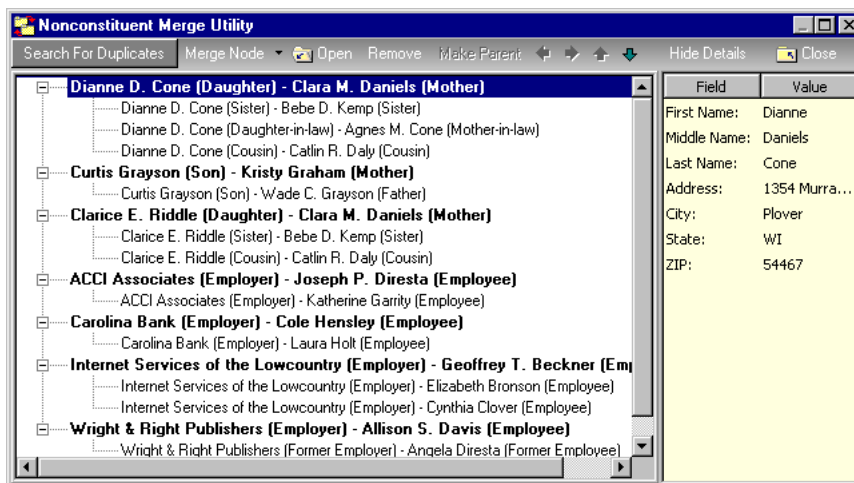


- To search your database for duplicate nonconstituent relationship records, click **Search For Duplicates** on the action bar. The records which have duplicates appear on the left.



**Note:** Once you click **Search For Duplicates**, you can cancel the process at any time and merge only the relationships that appear on the screen thus far. You can run the process as many times as necessary to merge all nonconstituent relationship records.

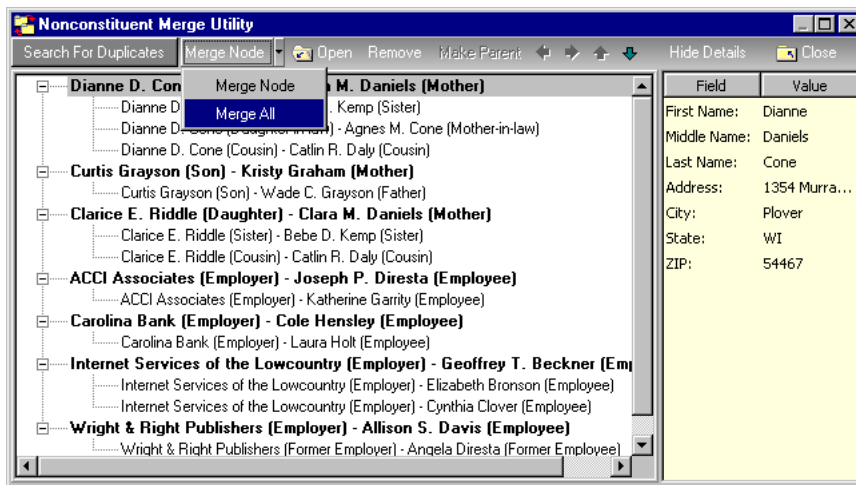
- To expand each name to see detailed information about the duplicates, click the plus sign beside each name.



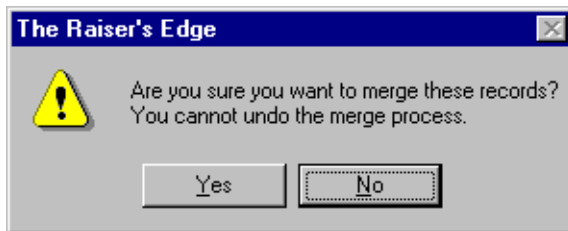
- To view details about each nonconstituent relationship record, select the record. Details from the nonconstituent relationship record appear on the right. If you do not want to show the box on the right, click **Hide Details** on the action bar.
- Once you view details, you may decide to use the arrows on the action bar to move records up or down in the tree view. To make a child relationship the parent relationship, select the child relationship and click **Make Parent** on the action bar. Once you click **Make Parent**, the child becomes the parent at the top of the list.
- To remove a relationship record from the list, select the record and click **Remove** on the action bar. When you remove a parent, the first child in the list moves up to the parent node. If you search for duplicates again, the record will reappear.

**Note:**

- When you are ready to merge the nonconstituent relationship records, on the action bar, click the arrow beside **Merge Node**. A submenu appears.



- Select **Merge All**. A message appears asking if you are sure you want to merge the records. Once merged, there is no undo.



**Note:** When you click **No**, you return to the Nonconstituent Merge Utility and nothing happens.

- To merge the records, click **Yes**. Information is merged as follows:
  - No fields in the parent (top) record are overwritten. Only empty fields are populated from the child records. Fields are populated in order of the tree view. Information from the first child record under the parent record is used. Information is used from each record in successive order.
  - Addresses are used as a whole. Address parts from child records are not used. If the parent's entire address is empty, then the address from the first child with an address is used.
  - Phone numbers are added unless a phone type already exists. The children's duplicate phone types are ignored.
  - Attributes are added unless an exact match exists or only one attribute of a particular type can be added.
  - Education records are added unless an exact match exists. Any empty fields on the education record are filled in using the child records with an exact match.
  - Business (organization) records are not merged unless the organization is an organization that is a constituent in your database. Only business records with matching constituent IDs are merged.
  - Any locked nonconstituent relationships are written to a control report.

**Note:**

- Once the records are merged, the control report appears. To close the control report, click the red "X" in the top left corner. You return the Nonconstituent Merge Utility screen.
- On the action bar, click **Close**. You return to the Plug-Ins page.



# Override Giving Score Ratings

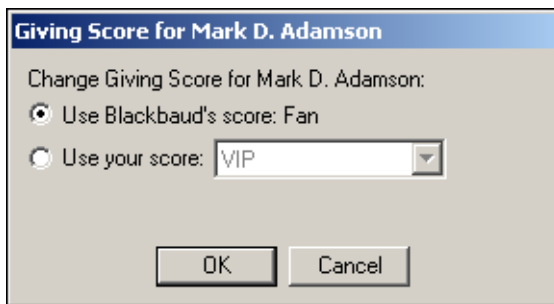
If your data has been scored by *Target Analytics* for the Giving Score, you can manually override the Giving Score prospect rating assigned to each constituent from the constituent record. The Giving Score prospect rating appears in the status bar of the constituent record.

**Note:** *Target Analytics* scores your data through the Data Health Center. For information about how to submit your data to be scored for the Giving Score, see the *Data Health Center Guide*.

## ► Override a Giving Score rating

1. Open the constituent record for which to override the Giving Score rating.
2. On the status bar, click the rating button. The Giving Score screen appears.

**Note:** The current Giving Score rating for the constituent appears in the status bar. Giving Score ratings include VIP, Fan, Long-Shot, Acquaintance. If the constituent does not have a rating, their status is No Score.



3. Select the Giving Score rating to use.
  - To use the Giving Score rating assigned to the constituent when *Target Analytics* scored your data through the Data Health Center, click **Use Blackbaud's score**.  
This option automatically assigns the most recent Giving Score rating from *Target Analytics*.
  - To override the *Target Analytics* Giving Score rating and assign another rating, click **Use your score** and select the rating to assign.  
The rating you assign will not change unless you assign a new one or select to use the *Target Analytics* score.
4. Click **OK**. You return to the constituent record.

# Actions



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In *The Raiser's Edge*, actions are specific steps you take toward securing a donation from a constituent. Actions can include meetings, mailings, telephone calls, email messages, and advocacy. Using actions, you can build a history of contacts and communication involved in creating a successful relationship with a constituent. In addition to tracking meetings, phone calls, and mailings, *The Raiser's Edge* can automatically remind you days, weeks, or months before an action is scheduled to occur.

**Note:** For more information about moves management, log into [www.blackbaud.com](http://www.blackbaud.com). Under **Nonprofit Resources**, select **White Papers**. Click the **Embracing Technology for Moves Management Success** link.

You can assign an action to a specific constituent. If you use *Event Management*, you can assign an action for an event. You can also assign an action for a specific appeal. When you assign an action, you create a new action record. This record holds a variety of information, including constituent or event name, appeal ID, action category, action type, date, solicitor, status, and priority. You can also link action records together into an action track, which is a sequence of related actions. Action tracks help you with your moves management strategies.

This chapter explains how to add, access, and work with action records and action tracks. It also introduces you to the basic concepts of action records, and defines words and phrases you need to know. The scenarios throughout *The Raiser's Edge* documentation walk you step-by-step through various procedures. Using these scenarios with the sample database is a fun way to learn *The Raiser's Edge*.

## Frequently Used Terms

This section defines words and phrases you need to know as you work with actions, action tracks, and action records. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

**Action.** An action is a specific step you take toward securing a donation from a constituent. It can include meetings, mailings, telephone calls, and email messages. Actions allow you to build a history of contacts and communications involved in creating a successful relationship with a constituent.

**Action category.** An action category defines the nature of the action. The categories are **Phone Call**, **Meeting**, **Mailing**, **Email**, **Advocacy**, or **Task/Other**. The action record has varying available fields depending on the category you select. For example, if you select **Phone Call**, you have a field to track the desired phone number and if you select **Meeting**, you can specify the location. Advocacy actions work differently than phone calls, meetings, mailings, email, and other types of actions. For more information, see Advocacy action.

**Note:** We recommend you set up an Action Reminder panel on the Home tab of User Options. When you open *The Raiser's Edge*, you are automatically reminded of your actions on the Home page. For more information about setting up this panel, see the *Program Basics Guide*.

**Action notification reminder.** A notification reminder (action reminder) in *The Raiser's Edge* reminds you days, weeks, or months before an action is scheduled to occur. You can easily keep track of when to phone a constituent, send out a mailing, or meet a prospect for lunch. The notification can be set up to remind any user in your database. Advocacy actions do not use notification reminders.

**Action record.** An action record contains all the pertinent information surrounding an action. Every action in the database has its own record, which can be accessed from the Actions tab of a constituent, event, or appeal record; or directly through the Actions page of *Records*.

**Action status.** Action status is a user-defined field that indicates the condition of the action. Examples are Open, Closed, Pending, Completed, and Not Completed. These statuses are used in building action tracks, creating queries, and generating reports.

**Action track.** An action track is a predefined sequence or series of actions assigned to a constituent, event, or appeal record. Tracks are usually a combination of independent and dependent actions. The creation of dependent actions is based on the completion of a previous independent action. Tracks simulate a hierarchal process or checklist for a constituent, event, or appeal. You can effectively use action tracks as part of your moves management strategies.

**Action type.** An action type is a user-created table that further defines the action category. Examples for **Mailing** may be Follow-up letter, Invitation, Welcome letter, Inquiry, and Birthday card.

**Advocacy action.** Nonprofits engage in advocacy whenever they work to change public policy. This means activities such as lobbying or partisan political activity, but it also means activities such as community organizing, working with the media, reporting on community problems, conducting get-out-to-vote campaigns, protesting in the streets, and more. You can use action records with a category of **Advocacy** to record actions your constituents take in response to an action alert, action email, appeal, or phone call initiated by you. Advocacy actions work differently than other actions in *The Raiser's Edge*. Instead of recording an action you take upon a constituent (such as a phone call, lunch meeting, or visit), this specific action category tracks the type of action a constituent takes in response to a form of advocacy.

**Inactive action.** An inactive action is no longer current or valid. Instead of deleting an action record, you can designate it as Completed or Closed. The action remains in your database for historic purposes.

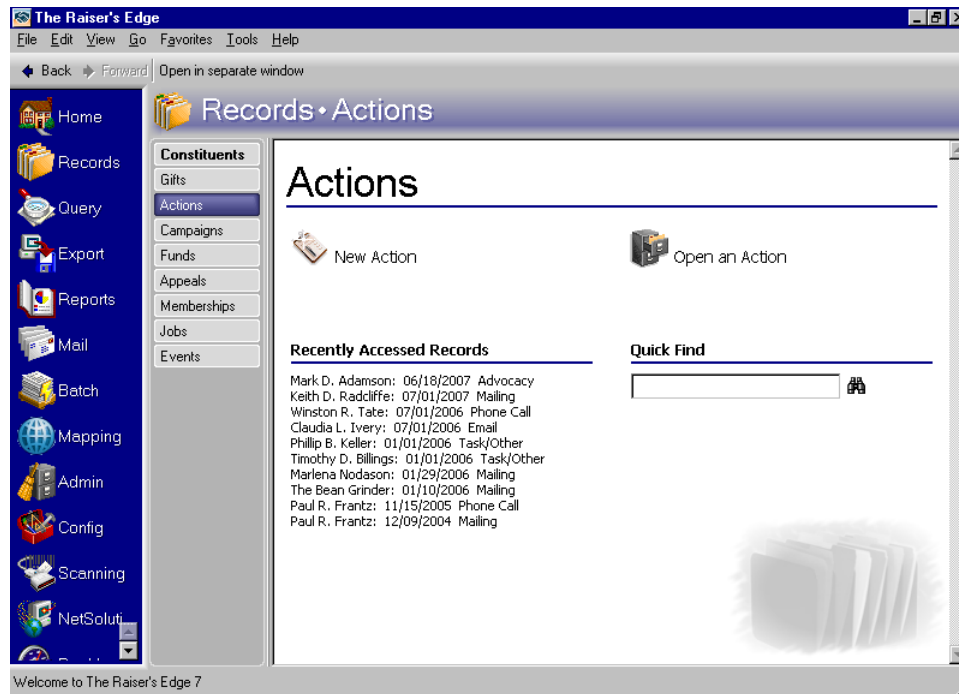
**Inactive action track.** An inactive action track is no longer current or valid. We recommend you mark the **Track is inactive** checkbox in lieu of deleting the action track. This way, the track remains in your database for historic purposes.

**Note:** *Prospect Research Management* is also a great tool for moves management tracking. For more information about *Prospect Research Management*, see the *Prospect Data Entry Guide*.

**Moves management.** Moves management is a system of monitoring, developing, and continuing relationships with your donors. The term “moves management” refers to a system to move a constituent from suspect to prospect to donor. You can use action tracks as part of your moves management strategies.

# Navigating in Action Records

Because records are such an important part of *The Raiser's Edge*, we placed all record types in one area so you can quickly access them. Think of *Records* as a filing cabinet. You open a filing cabinet to pull out a record. When you open *Records*, you can directly access (pull out) several record types, including action records. Click **Records** on the Raiser's Edge bar and click the **Actions** button. The Actions page appears.



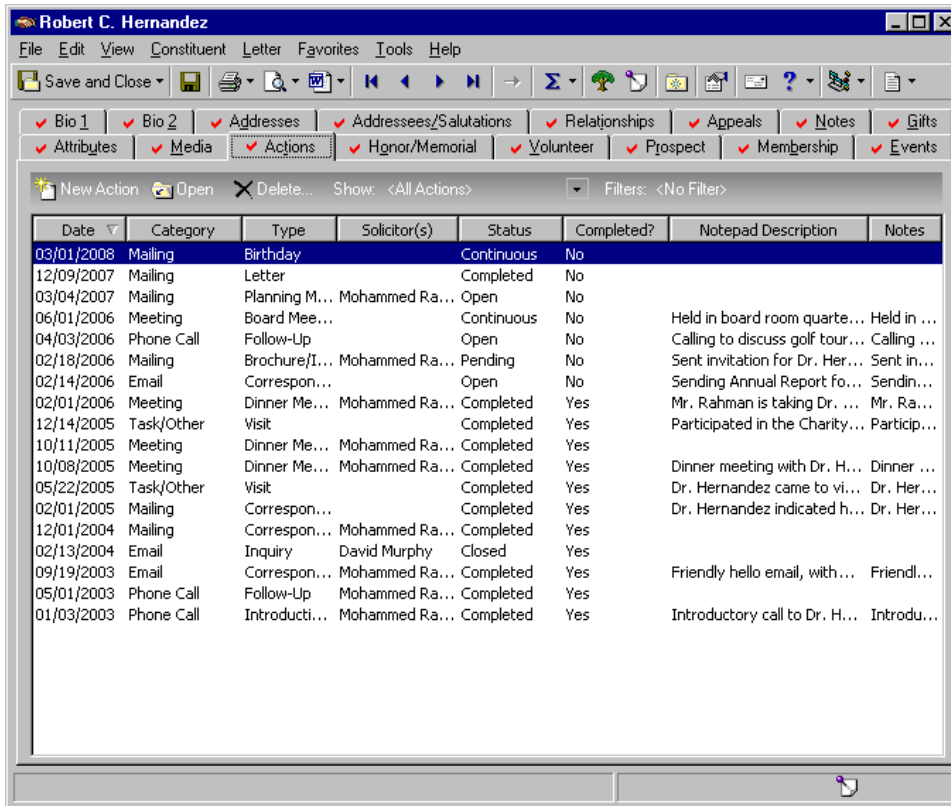
**Tip:** You can also view recently accessed action records by selecting **File, Recently Accessed Actions** from the menu bar of an action record.

You should consider the Actions page the starting point for action records. From this page, you can add a new action record or open an existing one. The Actions page also lists recently accessed action records and provides a **Quick Find** field. This chapter gets you started by showing you how to add a new record and open an existing record from the Actions page.

Once you add an action record for a constituent, event, or appeal, the action lists on the Actions tab of the constituent, event, or appeal record. The way you use the Actions tab in each record type is similar. If you have security rights, you can edit and delete action records. You can also add an entirely new action record from the Actions tab, although we recommend you add or open action records from *Records*. *Records* allows the easiest and most complete access to all record types.

## Actions Tab of a Constituent Record

The Actions tab of a constituent record stores the various communications between your organization and the constituent. These actions may include meetings, mailings, phone calls, email, and advocacy.



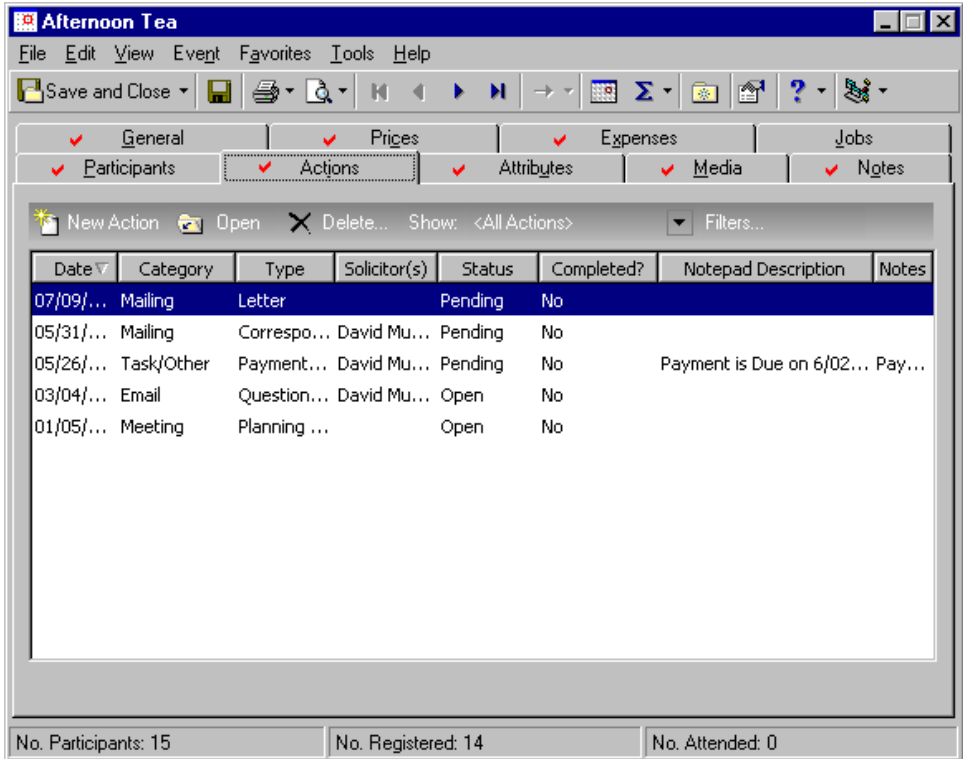
You can determine the actions that appear on the tab by sorting and filtering. When you sort the grid, you specify which action types appear. To sort, click the down arrow beside **Show** on the action bar and select the actions you want to view. Your options are All actions, Track view, Next 7 days, Overdue actions, Open actions, Completed actions, By category, By type, and Assigned to this solicitor.

**Note:** Assigned to this solicitor appears in the drop-down list in the **Show** field on the action bar only if the constituent is a solicitor. This is the only way to see on the solicitor's Actions tab the actions that have been assigned to him, rather than his own actions.

When you filter the grid, you define the specific action category, type, status, and/or action date to appear. To filter, click **Filter** on the action bar. When the Filters screen appears, enter your criteria and click **OK**. You can sort and filter the grid at the same time. For example, you can sort the grid by selecting **Completed actions** and then filter by selecting **Advocacy**. The grid then displays only completed actions with the category of **Advocacy**. These options are particularly helpful when viewing constituent records that contain a large number of actions.

# Actions Tab of an Event Record

The Actions tab of an event record tracks the various communications between your organization and the participants of an event. These actions may include meetings, mailings, phone calls, and email. By linking the action to a specific event record, you ensure the action is applied to all participants registered for that event or to certain participants, such as a vendor or the event planning committee.



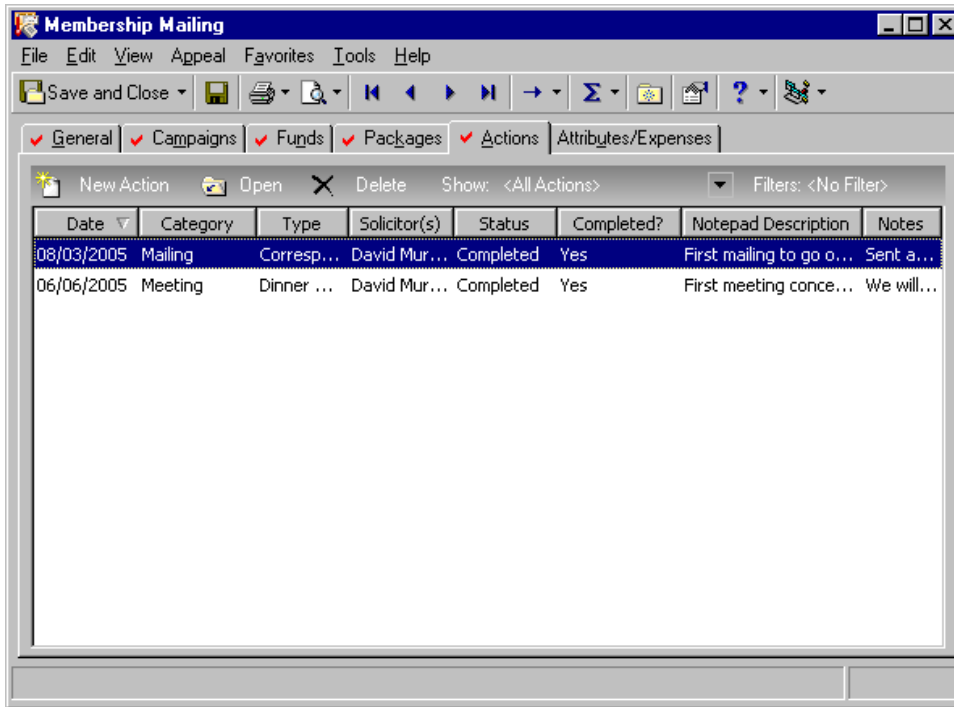
You can determine the actions that appear on the tab by sorting and filtering. When you sort the grid, you specify which action types appear. To sort, click the down arrow beside **Show** on the action bar and select which actions you want to view. Your options are All actions, Track view, Next 7 days, Overdue actions, Open actions, Completed actions, By category, and By type.

When you filter the grid, you define the specific action category, type, status, and/or action date to appear. To filter, click **Filter** on the action bar. When the Filters screen appears, enter your criteria and click **OK**. You can sort and filter the grid at the same time. For example, you can sort the grid by selecting Overdue actions and then filter by selecting Phone Call. The grid then displays only overdue actions with the category of Phone Call. These options are particularly helpful when viewing event records that contain a large number of actions.



## Actions Tab of an Appeal Record

The Actions tab of an appeal record tracks the various communications between your organization and the constituents who receive the appeal. You can also track actions associated with planning the appeal, such as meetings before the appeal is enacted. Appeal actions may include meetings, mailings, phone calls, and email. By linking the action to a specific appeal record, you ensure the actions are carried out.



You can determine the actions that appear on the Actions tab by sorting and filtering. When you sort the grid, you specify which action types appear. To sort, click the down arrow beside **Show** on the action bar and select which actions you want to view. Your options are All actions, Track view, Next 7 days, Overdue actions, Open actions, Completed actions, By category, and By type.

When you filter the grid, you define the specific action category, type, status, and/or action date to display. To filter, click **Filter** on the action bar. When the Filters screen appears, enter your criteria and click **OK**. You can sort and filter the grid at the same time. For example, you can sort the grid by selecting Overdue actions and then filter by selecting Phone Call. The grid then displays only overdue actions with the category of Phone Call. These options are particularly helpful when viewing appeal records that contain a large number of actions.

## Accessing Action Records

**Tip:** You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + S** on your keyboard to save a record or **CTRL + O** to open a record.

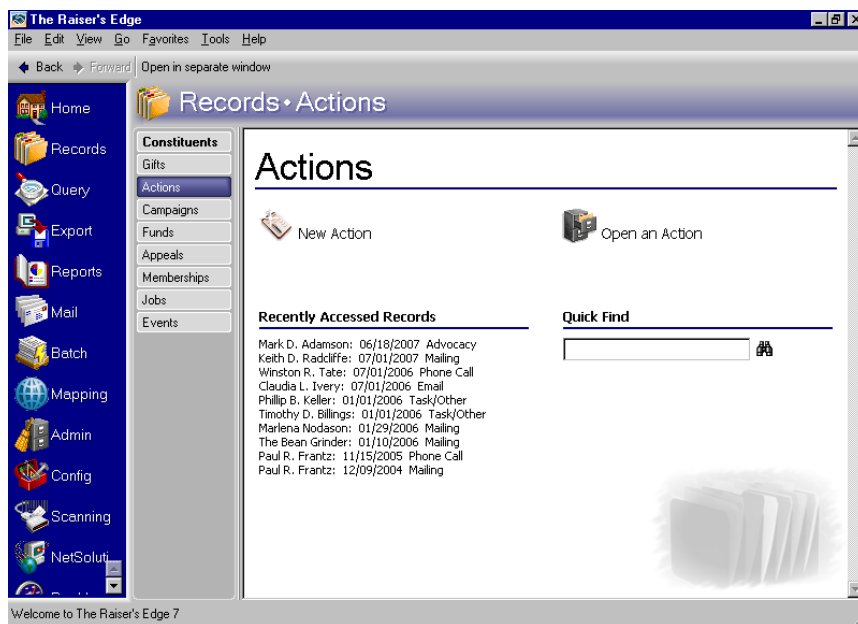
When we use the term “accessing” an action record, we mean opening an existing record. Every action you enter into *The Raiser's Edge* has a separate action record. Once an action record is in the database, you can open the record from the **File** menu on the shell of *The Raiser's Edge*; from the **File** menu of an existing action record; from the Actions tab of the constituent, event, or appeal record; and from the Actions page of *Records*. We recommend opening records from *Records* because it allows the easiest and most complete access to all record types.

When you click **Open an Action** on the Actions page, the Open screen for actions appears. Use this screen to tell **The Raiser's Edge** how to find the record. You can make the search broad or specific, depending on the amount of criteria you select. If you have a small database, you may want to enter limited information, such as **Last/Org name**, **Event name**, or **Appeal ID** and browse the records. If you have a larger database, you may need to be more selective and enter detailed information, such as **First name** or **Action date**.

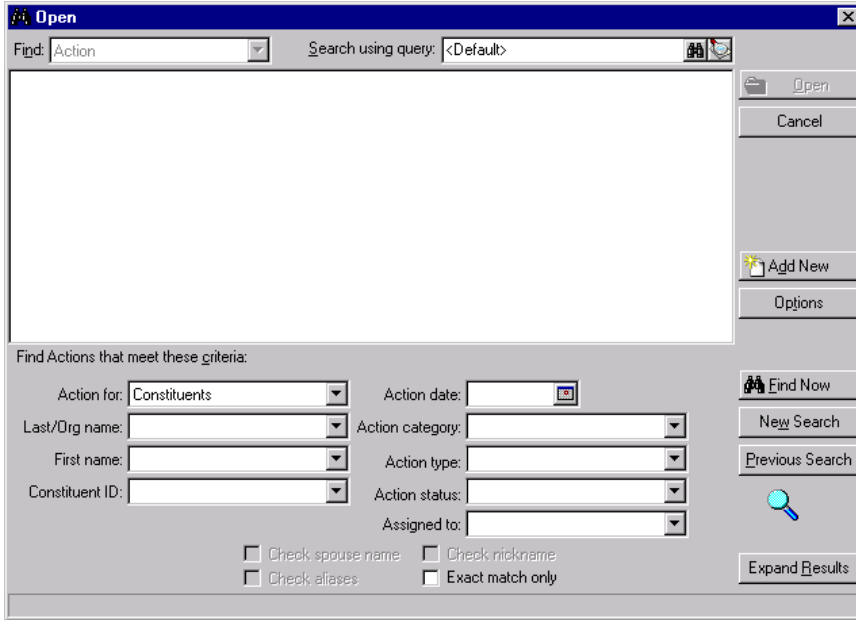
The search process is not case-sensitive, so you can enter Smith, smith, or SMITH and get the same results. You can also use wildcard characters if you are not sure how a word is spelled. For information about wildcards, see the Understanding Wildcard Characters section of the Query chapter in the *Query & Export Guide*.

### ► Opening an action record

1. On the Raiser's Edge bar, click **Records**.
2. Click **Actions**. The Actions page appears.

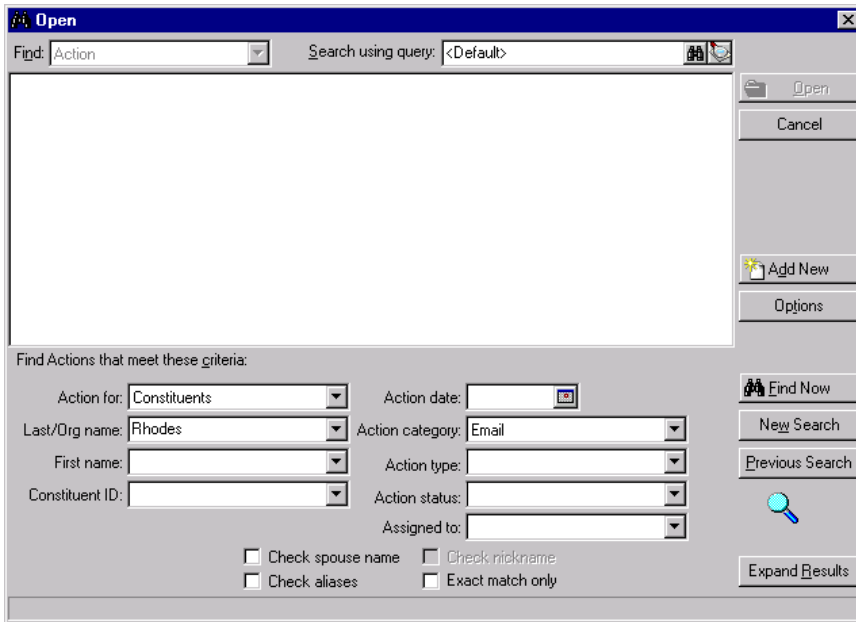


3. Click **Open an Action**. The Open screen for actions appears.



**Warning:** If you search for an action using the **Assigned to** criteria, you can enter only a last name. If you enter a first name or a first name and last name, the program will not find the action by that criteria.

4. In the **Action for** field, select whether you are searching for actions for “Constituents”, “Events”, or “Appeals”.
5. In the **Find Actions that meet these criteria** frame, enter the criteria you are using to search for the action. Depending on whether you are searching for constituent, event, or appeal action records, the criteria can change. You can include constituent last name or first name, constituent ID, event name, event ID, appeal ID, appeal description, action category, action status, and to whom the action is assigned.



**Warning:** We recommend you use only one or two of the most useful criteria fields to search for a record. Because the search results must meet all criteria you enter, adding too much criteria information may actually prevent you from locating the record.

- When you finish entering your search criteria, click **Find Now**. The program searches the database and displays all constituent, event, or appeal actions meeting your search criteria. Again, depending on how limited or detailed your criteria are, the program may find one record, many records, or no records.

The screenshot shows a software window titled "Open" with a search interface. At the top, there are fields for "Find: Action" and "Search using query: <Default>". Below this is a table with the following data:

Constituent	Action Date	Action Category	Action Type	Action
Carl Rhodes	02/23/2006	Email	Solicitation	Open

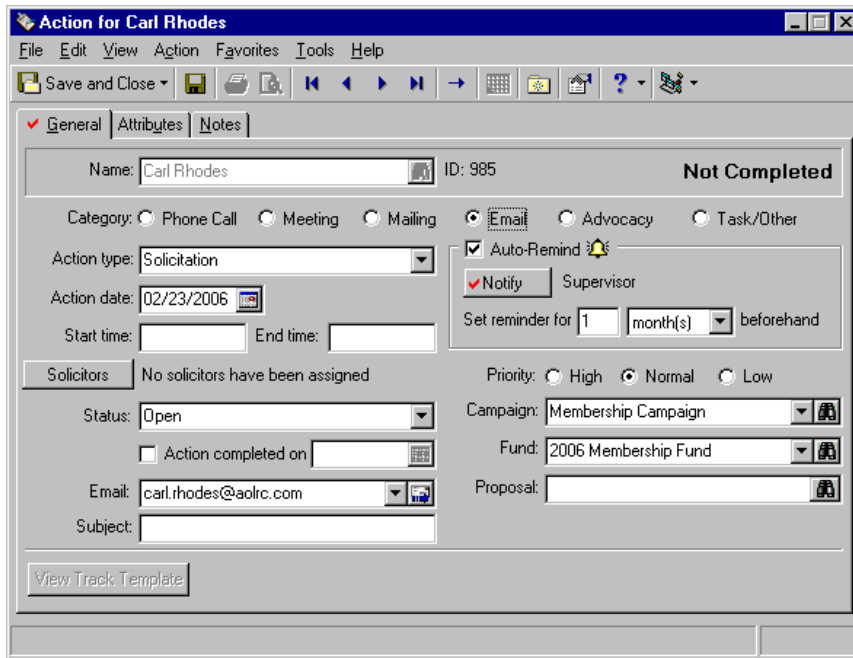
Below the table, there are several search criteria fields under the heading "Find Actions that meet these criteria:":

- Action for: Constituents
- Action date: [empty]
- Last/Org name: Rhodes
- Action category: Email
- First name: [empty]
- Action type: [empty]
- Constituent ID: [empty]
- Action status: [empty]
- Assigned to: [empty]

There are also four checkboxes for search options: "Check spouse name", "Check aliases", "Check nickname", and "Exact match only". On the right side of the window, there are buttons for "Open", "Cancel", "Add New", "Options", "Find Now", "New Search", "Previous Search", and "Expand Results". At the bottom left, it says "1 record found."

**Note:** You can enter the first few letters or characters in the **Find Actions that meet these criteria** fields if you do not know the correct spelling or number. For more information about how to use these fields, see the *Program Basics Guide*.

7. In the grid, select the action record you want to open and click **Open** on the action bar. The action record appears.

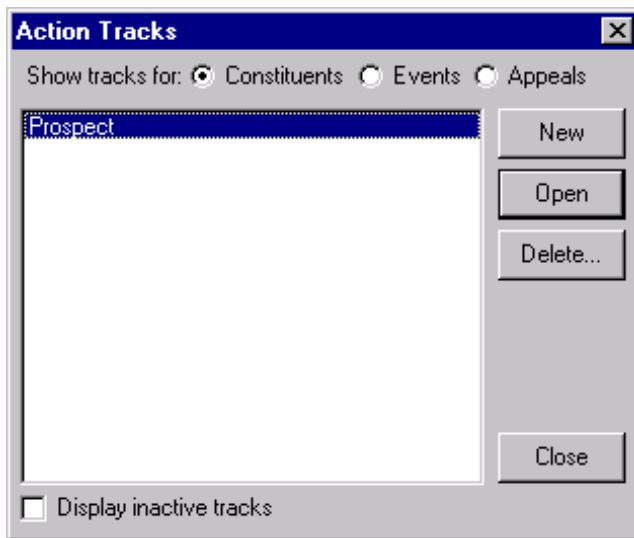


8. After you view or edit the record, click **Save and Close** on the action bar.

► **Opening an action track**

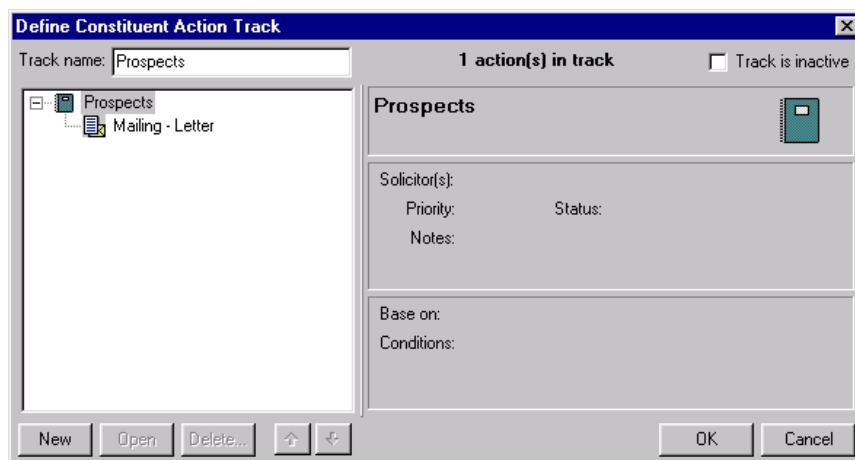
Action tracks are a means of adding a predefined set or series of actions to a constituent, event, or appeal record.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



2. On the Action Tracks screen, beside **Show tracks for**, select whether you want to open an action track for **Constituents, Events, or Appeals**.
3. In the box, select the track you want to open.

- Click **Open**. The track opens, displaying all linked actions and related information. From the Define Action Track screen, you can open an existing action, add a new action, or delete an action from the track.

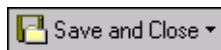


- Click **OK**. You return to the Action Tracks screen.
- Click **Close**.

## Action Record Toolbar

**Note:** You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

The toolbar appears near the top of all record types, between the menu bar and the tabs. A toolbar is a row of buttons representing commands or functions for a record. You can use these buttons as alternatives to menu commands to save time during data entry. In an action record, for example, the toolbar commands include **Save and Close**, **Add to Favorites**, and **Help**.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record and open a new record.)



Save the record and keep the record open



Print the action letter (only for **Mailing** category)



Preview the action letter (only for **Mailing** category)



Go to the first action record



Go to the previous action record



Go to the next action record



Go to the last action record



Go to constituent, event, or appeal record



Schedule follow-up action once action is completed



Add this action record to your Favorites



Open the Properties screen



Access help from online help files, user guides, online support, or the Blackbaud Web site



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you use *VBA for Advanced Customization*.

## User Options for Action Records

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on your workstation. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation.

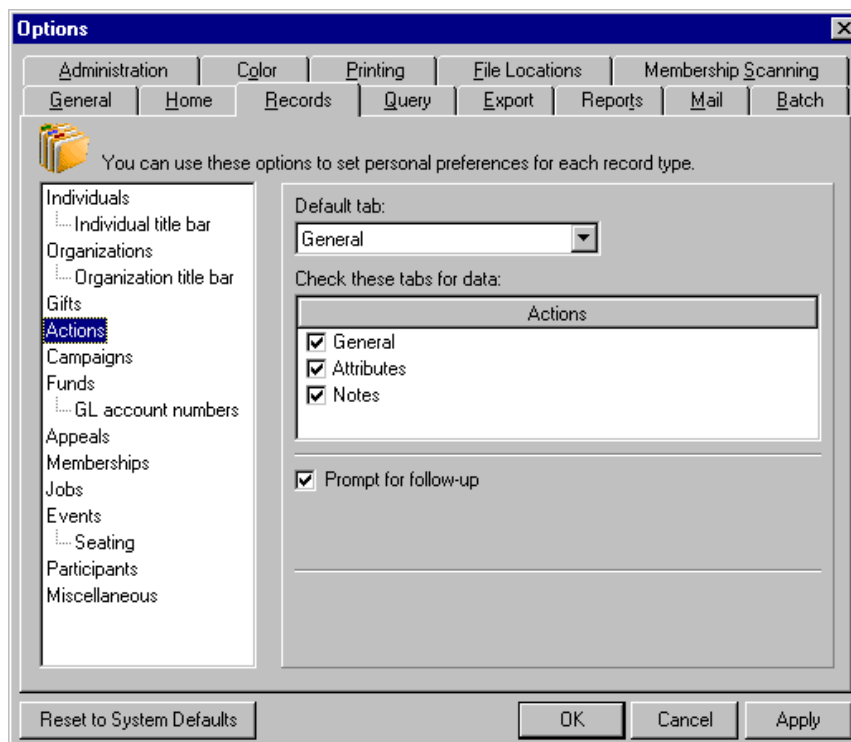
Configuring *The Raiser's Edge* properly is important. You have your own preferences, but some options can change the look and feel of the program. For example, you can choose to have check marks appear on all tabs containing data. You can also save time by setting up tab preferences. If you use the Actions tab most often, you can have that tab appear automatically when you add or open an individual or organization constituent record. For your action records, you can decide to have a record open on the General, Attributes, or Notes tab.

On the Records tab of User Options, for Action records, you can mark the **Prompt for follow-up** checkbox. The program will then ask if you want to add a follow-up action when you mark an action as completed. On the Home tab of User Options, we recommend you set up a panel to show constituent, event, and appeal action reminders on your Home page. For more information about setting up user options, and about setting up panels on your Home page, see the *Program Basics Guide*.

### ► Establishing user options for Action records

**Note:** You can also establish user options by selecting **Tools, User Options** from the menu bar of a constituent record.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Records tab.
3. From the tree view on the left, select **Actions**. The Action user option selections appear on the right.
4. In the **Default tab** field, select the tab you want to appear automatically when you add or open an action record.

**Tip:** To save time, in the **Actions** box, you can right-click and **Deselect All** or **Select All** the checkboxes.

5. In the **Actions** box, mark the checkbox by the tabs you want the program to search for data. On your action records, a red check mark will appear on each selected tab when you add data.
6. To have a message appear, asking if you want to add a follow-up action, each time you mark an action as completed, mark the **Prompt for follow-up** checkbox.
7. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

## Business Rules for Action Records

Business rules are ways for you to control certain functions and displays throughout *The Raiser's Edge*. You can establish business rules only if you have rights established from the **Security** link of *Administration*. Business rules affect all users of the program.

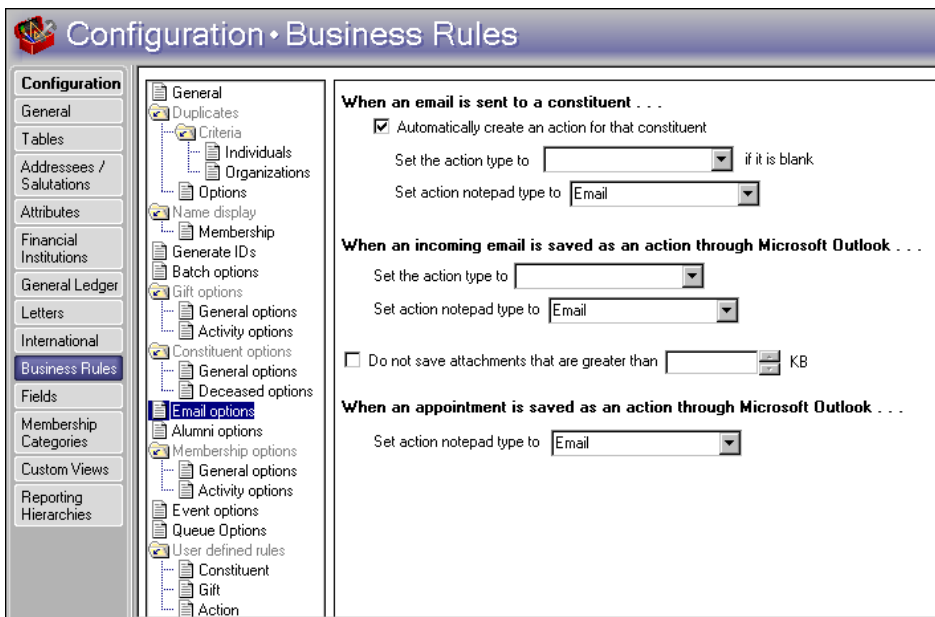
**Note:** You can send an email directly from an action record with the **Category** of **Email**. On the General tab, in the **Email** field, select the correct email address and click the **Send an email** button or select **Action, Send Email** from the menu bar. Each time you send an email from an action record, a notepad is created on the Notes tab of the action record to denote information such as the author, date/time the email was sent, and email text. For convenience, on the bottom right of the action record, a **View attached email** button appears. This button always contains your most recently sent email message.



Some business rules are specific to action records. If you use Microsoft *Outlook*, you can send email messages directly to a constituent from the constituent record. For example, you can click the email address in the **Phones/Email/Links** grid on the Bio 1 tab; select **Constituent, Send Email** from the menu bar; or click the **Send an Email** link on your Home page. Using **Email options**, under **Constituent options**, on the Business Rules page, you can specify that an action record be created automatically each time you send an email to a constituent. Under **When an email is sent to a constituent**, mark the **Automatically create an action for that constituent** checkbox. For each created action record, you can select to have a particular action type default onto the record. Each time you send an email from a constituent record, on the Notes tab of the action record, a notepad is created to record information such as the author, date/time the email was sent, and email text. For this created notepad, you can select to have a notepad type default.

If you fully integrate *The Raiser's Edge* with Microsoft *Office*, a **Create Action** button appears on the toolbar of your incoming email messages. Click the button to create an action record for each email. On the Notes tab of the action record, a notepad is created to record information such as the author, date/time the email was sent, and email text. Using **Email options** on the Business Rules page, under **When an incoming email is saved as an action though Microsoft Outlook**, you can select to have an action type default onto each action record you create. For each notepad, you can select to have a notepad type default. You can also choose to control the size of any attachments saved with the incoming email.

Also if you fully integrate *The Raiser's Edge* with Microsoft *Office*, when you add an appointment on your Outlook calendar, you can create a link to an action record for that appointment. Using **Email options** on the Business Rules page, under **When an appointment is saved as an action though Microsoft Outlook**, you can select to have a notepad type default for each action record you create.



**Note:** Integration is available only with Microsoft *Outlook 2000* or higher. For more information about setting up the integration, see *The Raiser's Edge & Microsoft Office Integration Guide*.

For information about how to set up business rules, see the Configuration chapter of the *Configuration & Security Guide*. For information about setting up integration, see *The Raiser's Edge & Microsoft Office Integration Guide*.

## Understanding Action Records

*The Raiser's Edge* uses a format called records to group information together. When you add a new action to *The Raiser's Edge*, you create a new action record. This record stores dates, times, and locations for that particular action.

The information stored in an action record is used extensively throughout the program. Because action information is used in generating reports, queries, and mailings, you should enter data in as many fields on the action record as possible. Keeping your data entry accurate is crucial. We encourage you to set up data entry protocols for your organization to keep records consistent and eliminate errors.

When you add a new action record, you have the option of adding the action for a constituent, event, or appeal. Whether you choose to add an action for a constituent, event, or appeal affects how the action record interacts with other areas of *The Raiser's Edge*. For example, you can create a query based on all actions or only constituent, event, or appeal actions.

## Adding Action Records

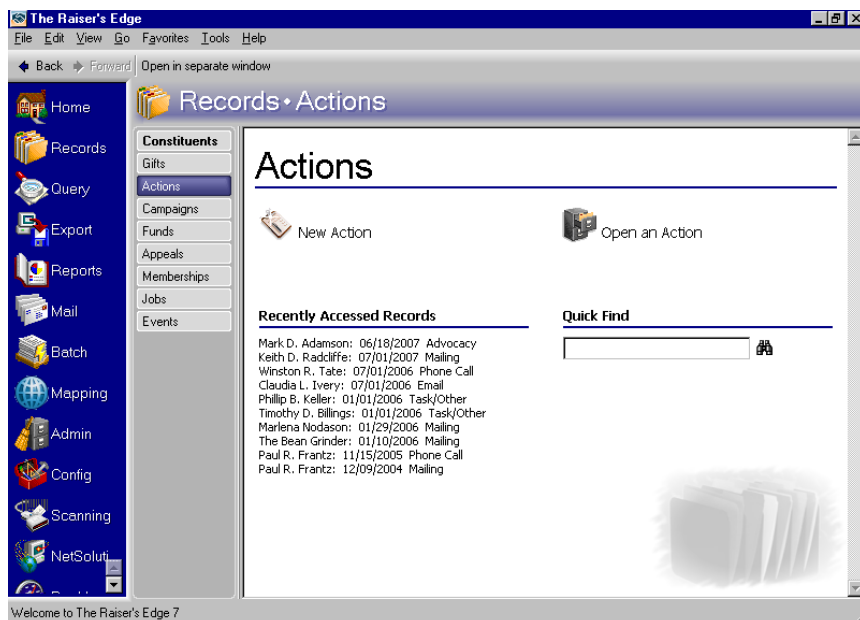
**Note:** Once you add an action record to your database, you can view the properties of that action record by selecting **File, Properties** from the menu bar of the record. Properties tell you the system record ID, the date the record was added, the date the record was last changed, who added it, who last changed it, and the import ID.

This section shows you, in a few basic steps, how to create the action record. Adding the action record to your database is simple: open a new action record; enter the constituent or event name, or appeal ID; enter action record details; and save the record. Once you create the record, “Managing Action Records” on page 247 walks you through the process of adding action record details, such as specific action information, reminder notification information, and action attributes.

### ▶ Adding an action record

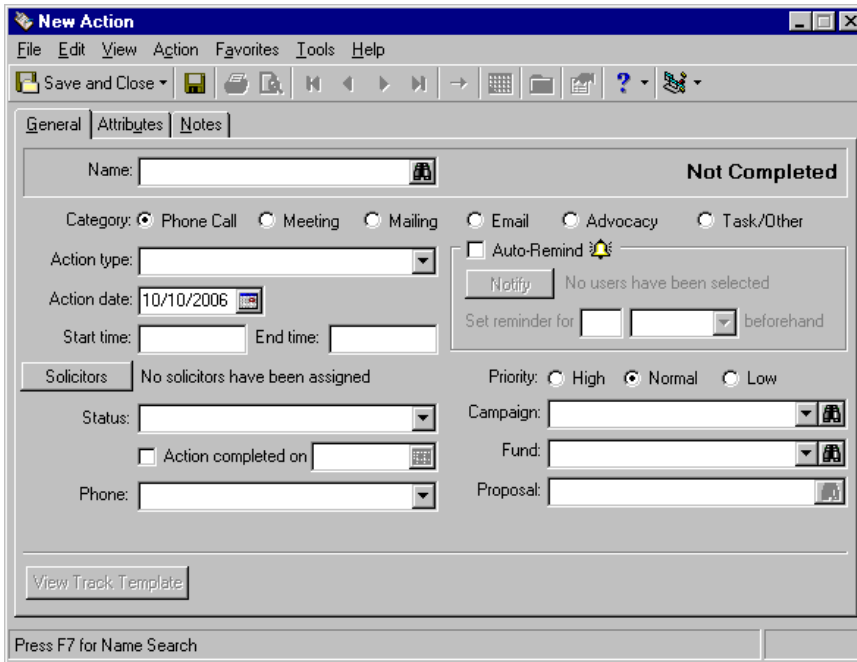
You can add an action record from *Records* and from the Actions tab of a constituent, event, or appeal record. Although the process of adding the record is basically the same, we recommend adding and opening records from *Records* because it allows the easiest and most complete access to all record types.

1. On the Raiser's Edge bar, click **Records**.
2. Click the **Actions** button. The Actions page appears.

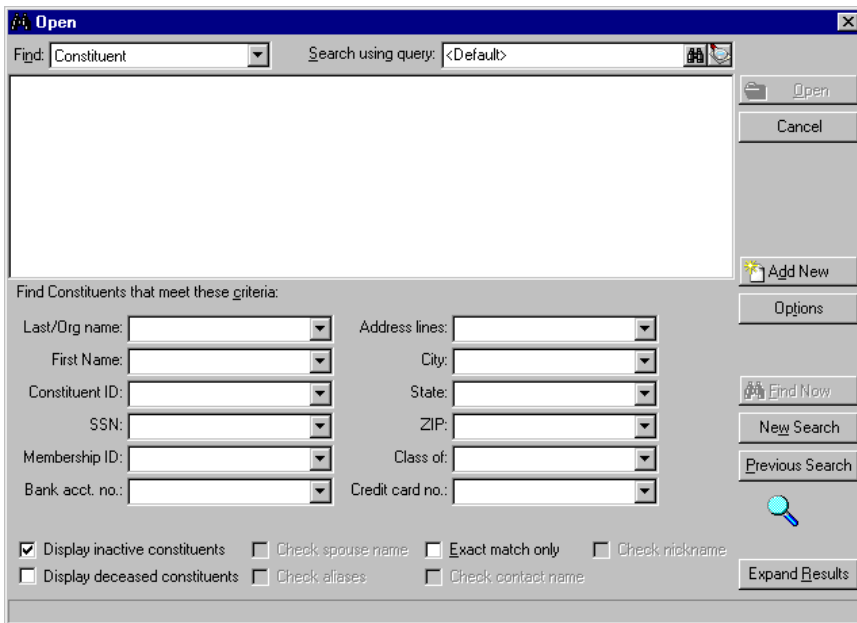


**Note:** When you add an action, it is important you add the action to the record of the constituent who is being “acted on.” For example, to be reminded you are taking Robert Hernandez to lunch, add the action to Robert’s constituent record. Advocacy actions work a little differently and they have no reminders. For information about advocacy actions, see “Advocacy Actions” on page 262.

3. Click **New Action**. The New Action screen appears.



4. In the **Name** field, click the binoculars. The Open screen appears.



5. In the **Find** field at the top of the screen, select “Constituent”, “Event”, or “Appeal”. You can search for a constituent, event, or appeal record.

**Note:** From an action record, you can go directly to the constituent, event, or appeal record the action is acting upon. From the menu bar of the action record, select **Action, Go to**. The constituent, event, or appeal record opens for you to view or edit.

6. Enter your search criteria to locate the record. The constituent, event, or appeal record must be in your database for you to find them. Once you locate the record, click **Open**. The New Action screen appears with the constituent, event, or appeal in the **Name** field. For more information about using the Open screen, see the *Program Basics Guide*.

7. After you enter all action record details, click **Save and Close** on the toolbar.

## Managing Action Records

Once you create the basic action record, what is your next step? You compile an effective filing cabinet by adding information for specific tasks and storing them in separate files. Files for the action record include specific action information, notification reminder information, and action attributes.

To help you use the action record filing cabinet to its maximum potential, we take you step-by-step through several scenarios and procedures for adding these files. We strongly recommend you add as much information for each action as possible. Tracking a wide variety of data increases the effectiveness of your organization by helping you accurately manage your fundraising efforts and actions.

Constituent, event, and appeal action records are identical. All three records contain three tabs: General, Attributes, and Notes. These tabs contain fields that track the type, dates, times, locations and special preferences associated with the action.

### General Tab

**Note:** If the action has the **Category** of **Mailing**, in the **Letter** field, you can quickly create a letter directly from the action record. Click the Microsoft *Word* icon in the **Letter** field. For more information about creating letters, see “Quickly writing a letter from the Letter menu of a constituent record” on page 210. You can follow the same instructions to create your action letter here.

The heart of the action record is the General tab. This tab holds the “what, why, and where” information for an action. It stores detailed information, such as constituent, event, or appeal name; action category; action type; action date; solicitors; priority; reminder notification; campaign; and fund. On this tab, you can schedule notification reminders to alert you days, weeks, or months before an action is scheduled to occur. On the General tab, the **Location** field changes depending on the **Category** type. For Meeting, the field is **Location**; for Phone Call, the field is **Phone**; for Mailing, the field is **Letter**; for Email, the field is **Email**; and for Task/Other, the field is **Letter**.

The **Contact** field is available only for organization constituents. The **Proposal** field is available on all action records if you use *Prospect Research Management*.

An advocacy action has several different fields. For more information, see “Advocacy Actions” on page 262.

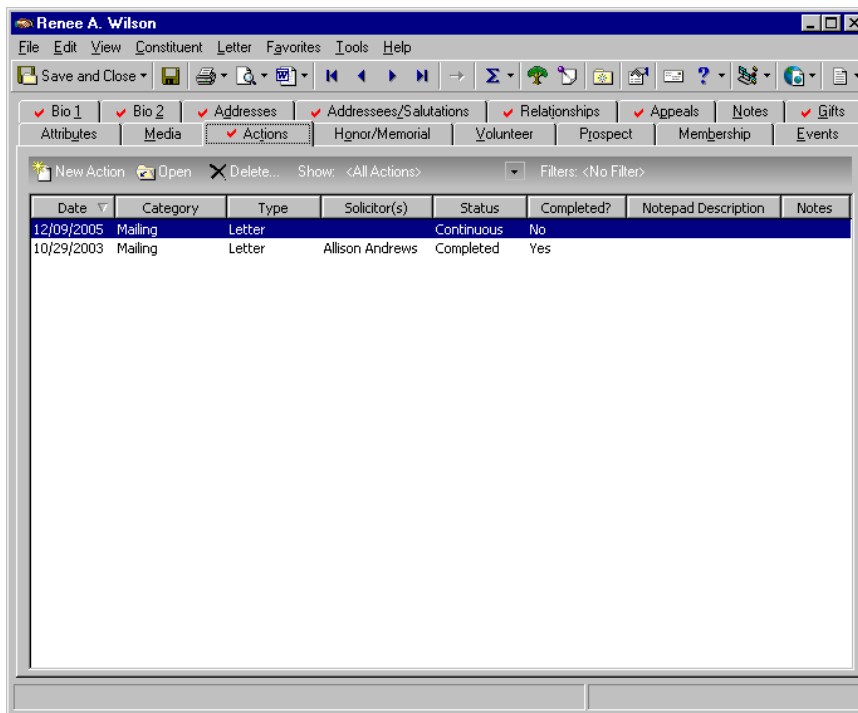
► **Adding an action from a constituent record**

When we talk about action information, we mean the specific details that tell you what the action is, when the action is added, and why the action is important.

**Scenario:** You called Renee Wilson this morning to verify a time for next week’s lunch meeting. Add the phone call to Renee’s Actions tab for prospect tracking purposes. Enter specific details about the category, type, action date, status, and priority.

Note: We recommend you set up an Action Reminder panel on the Home tab of User Options. When you open *The Raiser’s Edge*, you are automatically reminded of your actions on the Home page. For more information about setting up this panel, see the *Program Basics Guide*.

1. From Renee Wilson’s constituent record, select the Actions tab. For more information about opening records, see “Access Constituent Records” on page 4.



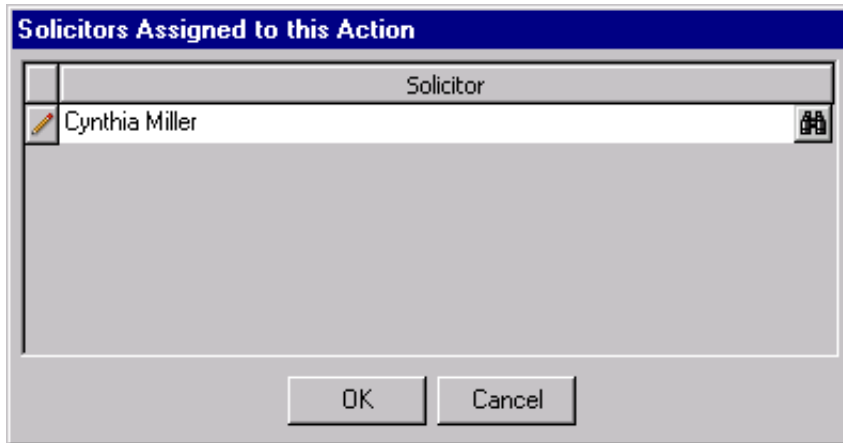
Note: If the action has the **Category of Mailing**, in the **Letter** field, you can quickly create a letter directly from the action record. Click the Microsoft *Word* icon in the **Letter** field. For more information about creating letters, see “Quickly writing a letter from the Letter menu of a constituent record” on page 210. You can follow the same instructions to create your action letter here.

2. On the action bar, click **New Action**. The Action screen appears.

**Tip:** If you use Microsoft *Outlook*, you can send email messages directly from an action record with the **Category of Email**. In the **Email** field, select the correct email address and click the **Send an email** button. On the email screen, compose and send your message. Each time you send an email, a notepad is created on the Notes tab of the action record to denote information such as the author, date/time the email was sent, and email text. For convenience, on the bottom right of the action record, a **View attached email** button appears. This button always contains your most recently sent email message.

3. Select the General tab.
4. In the **Category** field, mark the **Phone Call** option.
5. In the **Action type** field, select “Inquiry”. This inquiry is in reference to a suitable time for next week’s lunch meeting.
6. In the **Action date** field, enter today’s date.
7. In the **Start time** field, enter “9:00 AM”; in the **End time** field, enter “9:30 AM”. The call lasted approximately 30 minutes.
8. Click **Solicitors**. The Solicitors Assigned to this Action screen appears. From this screen, you can assign a solicitor to the action. By assigning a solicitor to an action, the solicitor becomes responsible for making sure the assigned action is completed.

9. In the first row, click the binoculars. The Open screen for constituents appears. Enter “Miller” in the **Last/Org name** field and click **Find**. When you find and select Cynthia Miller, her name automatically appears in the Solicitor grid.



10. Click **OK**. You return to the General tab of the New Action screen.
11. In the **Status** field, select “Completed”.
12. Mark the **Action completed on** checkbox and enter today’s date in the accompanying field.

**Note:** Depending on the **Category** you choose for an action, the **Phone** field becomes **Location, Letter, or Email**.

13. In the **Phone** field, select Renee’s home number.
14. In the **Priority** field, mark the **Normal** option. This phone call was neither a High nor Low priority. A priority of Normal is the system default.
15. In the **Campaign** field, select “Annual Campaign”. This phone call and next week’s lunch meeting are actions you are taking in hopes of securing a donation to the Annual Campaign.
16. In the **Fund** field, select “Botanical Garden Fund”. This is the fund where you want the potential donation to go.
17. This action is not related to a particular proposal, so you can leave the **Proposal** field blank. If an action is related to a proposal, in the **Proposal** field, click the binoculars. The Open screen for proposals appears so you can search your database for the correct one. When found and selected, the proposal name appears in the field.
18. On the toolbar, click **Save and Close**. You return to the Actions tab of Renee’s constituent record.
19. Click **Save and Close**.

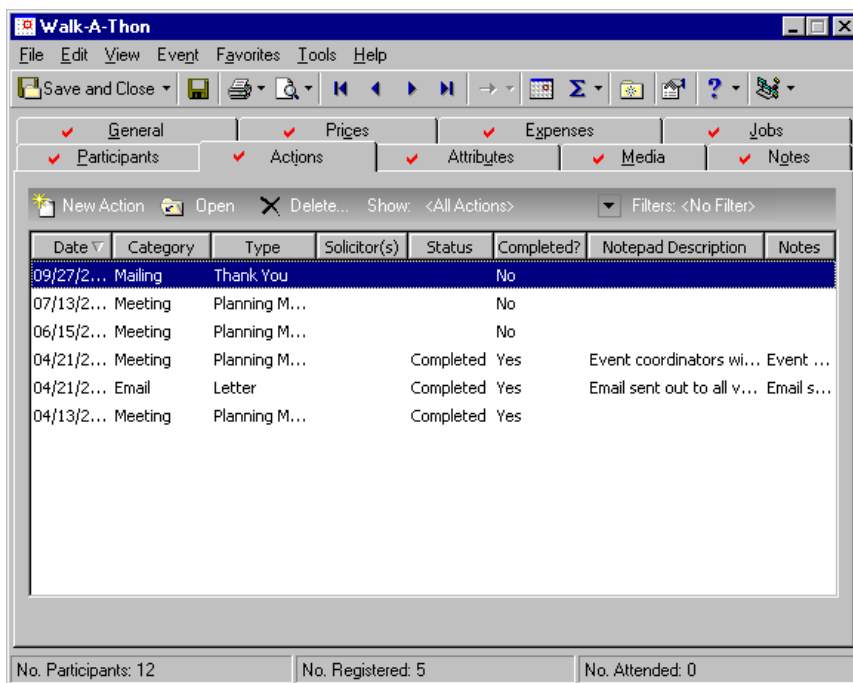
► **Adding an action from an event record**

When we talk about action information, we mean the specific details that tell you what the action is, when the action is added, and why the action is important. The details include category, type, status, priority, campaign, fund, and solicitor.

**Scenario:** You mailed a sponsor packet this morning to all participants registered for your upcoming Walk-A-Thon. To track the preparation steps for this event, add this new action to the Walk-A-Thon event record. Include the action category, action date, status, letter, campaign, and fund.

**Note:** We recommend you set up an Action Reminder panel on the Home tab of User Options. When you open *The Raiser's Edge*, you are automatically reminded of your actions on the Home page. For more information about setting up this panel, see the *Program Basics Guide*.

1. From the Walk-A-Thon event record, select the Actions tab. For more information about opening an event record, see the *Event Management Data Entry Guide*.



**Note:** If an action added from the Actions tab of a constituent record or the shell of *The Raiser's Edge* has the **Category of Mailing**, in the **Letter** field, you can quickly create a letter directly from the action record. Click the Microsoft *Word* icon in the **Letter** field. For more information about creating letters, see "Quickly writing a letter from the Letter menu of a constituent record" on page 210. You can follow the same instructions to create your action letter here.



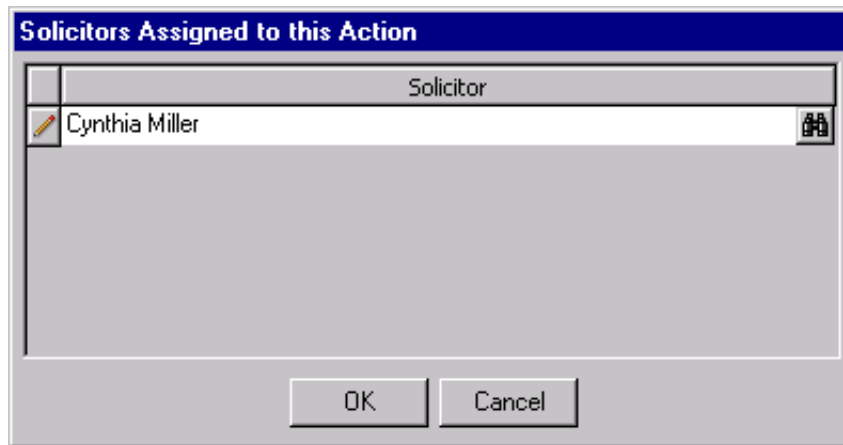
2. On the action bar, click **New Action**.

**Tip:** If you use Microsoft *Outlook*, you can send email messages directly from an action record with the **Category of Email**. In the **Email** field, select the correct email address and click the **Send an email** button. On the email screen, compose and send your message. Each time you send an email, a notepad is created on the Notes tab of the action record to denote information such as the author, date/time the email was sent, and email text. For convenience, on the bottom right of the action record, a **View attached email** button appears. This button always contains your most recently sent email message.

3. Select the General tab.
4. In the **Category** field, mark the **Mailing** option.
5. In the **Action type** field, select “Correspondence”. This mailing contains the Sponsor packets your participants will use to track their sponsors and donation promises for the Walk-A-Thon.
6. In the **Action date** field, enter today’s date.
7. If your event action has a definitive start and end time, you can enter them in the **Start time** and **End time** fields. This mailing does not because you are not sure what time you are going to start working on the mailing and you do not know exactly how long it is going to take you to finish it. For this scenario, you can leave these fields blank.
8. Click **Solicitors**. The Solicitors Assigned to this Action screen appears. From this screen, you can assign a solicitor to the action. By assigning a solicitor to an action, the solicitor becomes responsible for making sure the assigned action is completed.

**Tip:** If you know the solicitor’s name, you can type it directly into the **Solicitors** field on the action record.

9. In the first row, click the binoculars. The Open screen for Constituents appears. Enter “Miller” in the **Last/Org name** field and click **Find**. When you find and select Cynthia Miller, her name automatically appears in the Solicitor grid.



10. Click **OK**. You return to the General tab of the New Action screen.
11. In the **Status** field, select “Completed”. The action is finished.
12. Mark the **Action completed on** checkbox and enter today’s date in the accompanying field.
13. In the **Letter** field, select “Walk-A-Thon Sponsor Packet”. This is the letter that is accompanying your mailing.
14. Leave the **Priority** as **Normal**.
15. In the **Campaign** field, select “Playground Campaign”. All donations raised in response to the Walk-A-Thon will go to playground construction.
16. In the **Fund** field, select “Playground Site”. All donations raised from the Walk-A-Thon will go to this particular fund.
17. On the toolbar, click **Save and Close**. You return to the Actions tab of the Walk-A-Thon event record.

**Note:** If you marked the **Prompt for follow-up** checkbox on the Records tab under **Actions** on the Options screen of User Options, a message appears asking “Do you want to add a follow-up action?” Click **Yes** or **No**. You can also mark the **Do not ask me again** checkbox. You can manually schedule a follow-up action directly from the menu bar of the action record. Select **Action, Follow-Up**.

18. Click **Save and Close**.

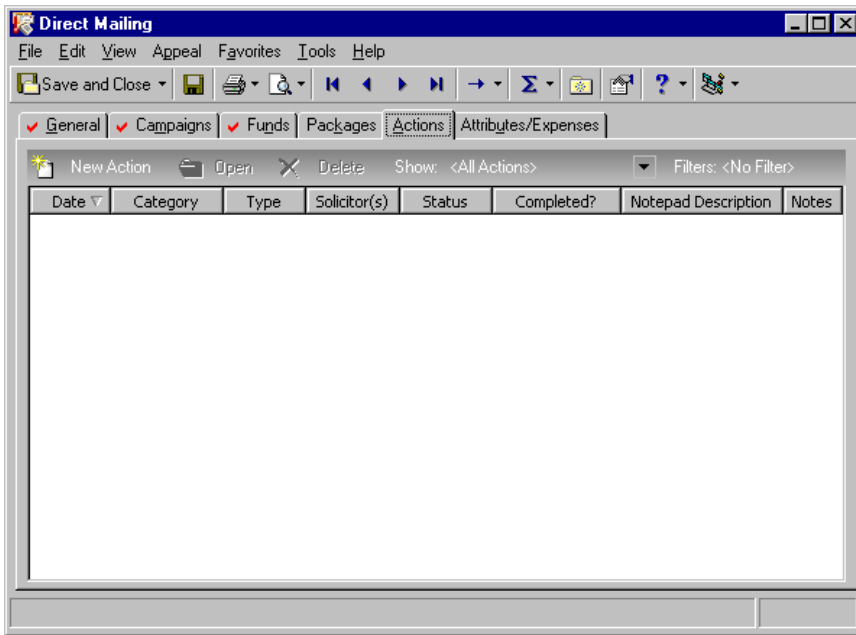
#### ▶ Adding an action from an appeal record

When we talk about action information, we mean the specific details that tell you what the action is, when the action is added, and why the action is important. The details include category, type, status, priority, campaign, fund, and solicitor.

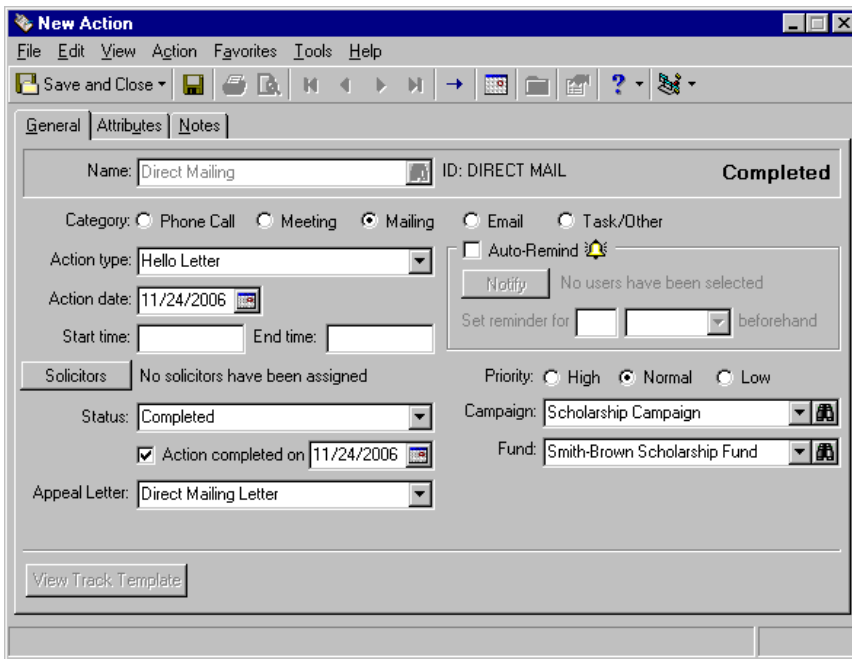
**Scenario:** You sent out a direct mailing this morning to all constituents to solicit for the Smith-Brown Scholarship Fund. Add an action to the Direct Mailing appeal, so you can better track this mailing. Include the action category, action date, status, letter, campaign, and fund.

**Note:** We recommend you set up an Action Reminder panel on the Home tab of User Options. When you open **The Raiser’s Edge**, you are automatically reminded of your actions on the Home page. For more information about setting up this panel, see the *Program Basics Guide*.

1. From the Direct Mailing appeal record, select the Actions tab. For more information about opening an appeal record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. On the action bar, click **New Action**. The New Action screen appears.



3. Select the General tab.

**Tip:** If you use Microsoft *Outlook*, you can send email messages directly from an action record with the **Category of Email**. In the **Email** field, select the correct email address and click the **Send an email** button. On the email screen, compose and send your message. Each time you send an email, a notepad is created on the Notes tab of the action record to denote information such as the author, date/time the email was sent, and email text. For convenience, on the bottom right of the action record, a **View attached email** button appears. This button always contains your most recently sent email message.

4. In the **Category** field, mark the **Mailing** option.
5. In the **Action type** field, select “Hello Letter”. This mailing contains the Hello Letter you are sending to constituents to explain your monetary needs for the Smith-Brown Scholarship Fund.
6. In the **Action date** field, enter today’s date.
7. If your event action has a definitive start and end time, you can enter them in the **Start time** and **End time** fields. This mailing does not because you are not sure exactly what time you are going to start working on the mailing and you do not know exactly how long it is going to take you to finish it. For this scenario, you can leave these fields blank.
8. In the **Status** field, select “Completed”. The action is finished.
9. Mark the **Action completed on** checkbox and enter today’s date in the accompanying field.
10. In the **Appeal Letter** field, select “Direct Mailing Letter”. This is the letter that is accompanying your mailing.
11. Leave the **Priority** as **Normal**.
12. In the **Campaign** field, select “Scholarship Campaign”.
13. In the **Fund** field, select “Smith-Brown Scholarship Fund”. All donations raised from the letter will go to this particular fund.
14. On the toolbar, click **Save and Close**. You return to the Actions tab of the Direct Mailing appeal record.

**Note:** If you marked the **Prompt for follow-up** checkbox on the Records tab under **Actions** on the Options screen of User Options, a message appears asking “Do you want to add a follow-up action?” Click **Yes** or **No**. You can also mark the **Do not ask me again** checkbox. You can manually schedule a follow-up action directly from the menu bar of the action record. Select **Action, Follow-Up**.

15. Click **Save and Close**.

▶ **Adding a notification reminder to an action record**

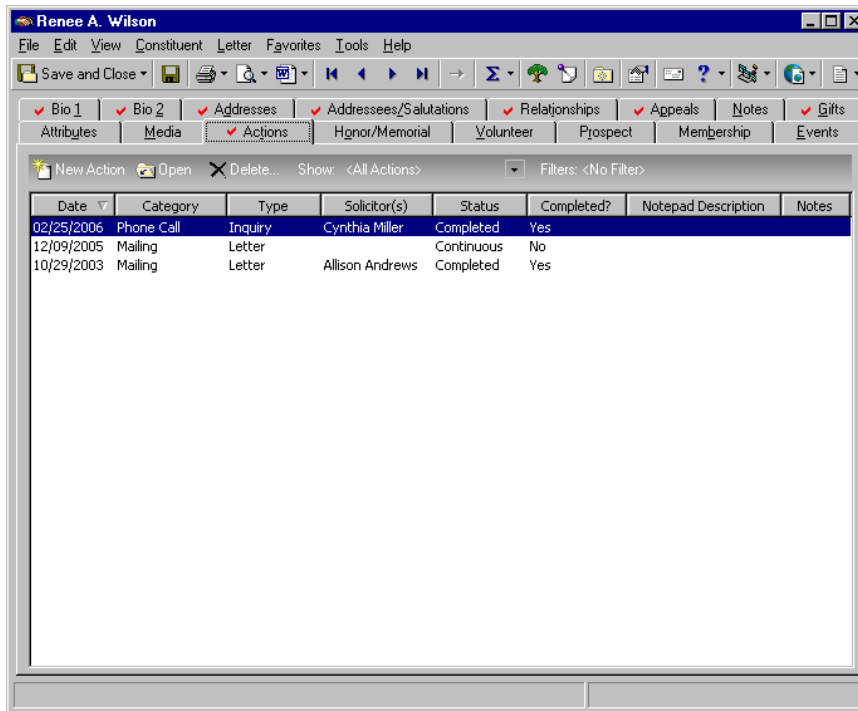
Notification reminders on your actions allow *The Raiser’s Edge* to remind you days, weeks, or months before an action is scheduled to occur. You can easily keep track of when to phone a constituent, send out a mailing, or meet a prospect for lunch. You can use these steps to add notification reminders to constituent, event, and appeal action records.

---

**Scenario:** You call Renee Wilson this morning and agree on 1:00 p.m. for next week’s lunch meeting. Add an action to her constituent record, detailing the specifics of the meeting. In addition, set up a notification to remind yourself one day before the meeting is scheduled to occur.

**Note:** Advocacy actions have no need for reminders. For more information, see “Advocacy Actions” on page 262

1. From Renee Wilson's constituent record, select the Actions tab. For more information about opening records, see "Access Constituent Records" on page 4.



**Note:** We recommend you set up an Action Reminder panel on the Home tab of User Options. When you open *The Raiser's Edge*, you are automatically reminded of your actions on the Home page. For more information about setting up this panel, see the *Program Basics Guide*.

2. On the action bar, click **New Action**. The New Action screen appears.
3. Select the General tab.

**New Action**

Name: Renee Wilson ID: 129 **Not Completed**

Category:  Phone Call  Meeting  Mailing  Email  Advocacy  Task/Other

Action type: Lunch Meeting

Action date: 06/09/2006

Start time: 1:00 PM End time:

Auto-Remind

Notify No users have been selected

Set reminder for [ ] [ ] beforehand

Solicitors No solicitors have been assigned Priority:  High  Normal  Low

Status: Not Completed Campaign: Annual Campaign

Action completed on [ ] Fund: Botanical Garden Fund

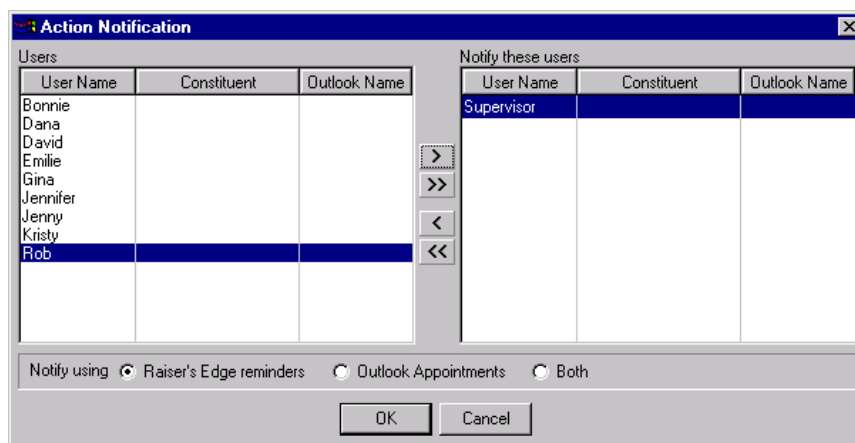
Location: The Country Place Restaurant Proposal: [ ]

View Track Template

4. In the **Category** field, mark the **Meeting** option.
5. In the **Action Type** field select “Lunch Meeting”.
6. In the **Action date** field, enter next Monday’s date.
7. In the **Start time** field, enter “1:00 PM”. The **End time** field can be left blank. You do not know the time the lunch meeting will end.
8. In the **Status** field, select “Not Completed”. The action has not taken place yet.
9. In the **Location** field, select “The Country Place Restaurant”.
10. Mark the **High** option beside **Priority**. This is a very important meeting.
11. In the **Campaign** field, select “Annual Campaign”.
12. In the **Fund** field select “Botanical Garden Fund”.
13. Mark the **Auto-Remind** checkbox. The fields in the **Auto-Remind** frame are enabled.

**Note:** On the bottom of the Action Notification screen, you can select whether you want to be notified using **Raiser’s Edge reminders**, **Outlook Appointments**, or **Both**. You can only select **Outlook Appointments** if you have Microsoft *Outlook* installed.

14. Click **Notify**. The Action Notification screen appears.



**Note:** The user names listed on the Action Notification screen are pulled directly from the Users group in *Administration*. For more information, see the Security chapter of the *Configuration & Security Guide*.

15. In the **Users** box, select “Supervisor” and click the single right arrow. This moves Supervisor over to the **Notify these users** box. This means the Supervisor will be reminded automatically of this action when she logs into *The Raiser’s Edge*.
16. On the bottom of the Action Notification screen, select whether you want to be reminded using **Raiser’s Edge reminders**, **Outlook Appointments**, or **Both**. For this scenario, mark **Raiser’s Edge reminders**.  
 To use Outlook appointments, you must have Microsoft *Outlook* installed and your name must be set up as a user. When you mark **Outlook Appointments**, a meeting request will be sent to the persons in the **Notify these users** box. The meeting will default to the **Action date**, the **Start time**, and **End time** you enter on the Action screen. If you enter a **Start time** and no **End time**, the meeting will default to 30 minutes. If you enter neither a **Start time** nor **End time**, the meeting will be set up as an all day event. If you change the meeting date and time in *The Raiser’s Edge*, the meeting will update in *Outlook*. If you change the meeting date and time in *Outlook*, the meeting will not update in *The Raiser’s Edge*.
17. Click **OK**. You return to the General tab of the action record.

18. In the **Set reminder for** field, enter “1” in the first box and select “day(s)” in the second box. This information tells *The Raiser’s Edge* you or another user want to be reminded of this action one day before the date in the **Action date** field.
19. On the toolbar, click **Save and Close**. You return to the Actions tab of Renee’s constituent record.
20. Click **Save and Close**.

## Attributes Tab

The Attributes tab helps you identify specific attributes for the action. Attributes are the qualities, characteristics, and preferences associated with the action. These attributes can include activities, special requests, or important dates.

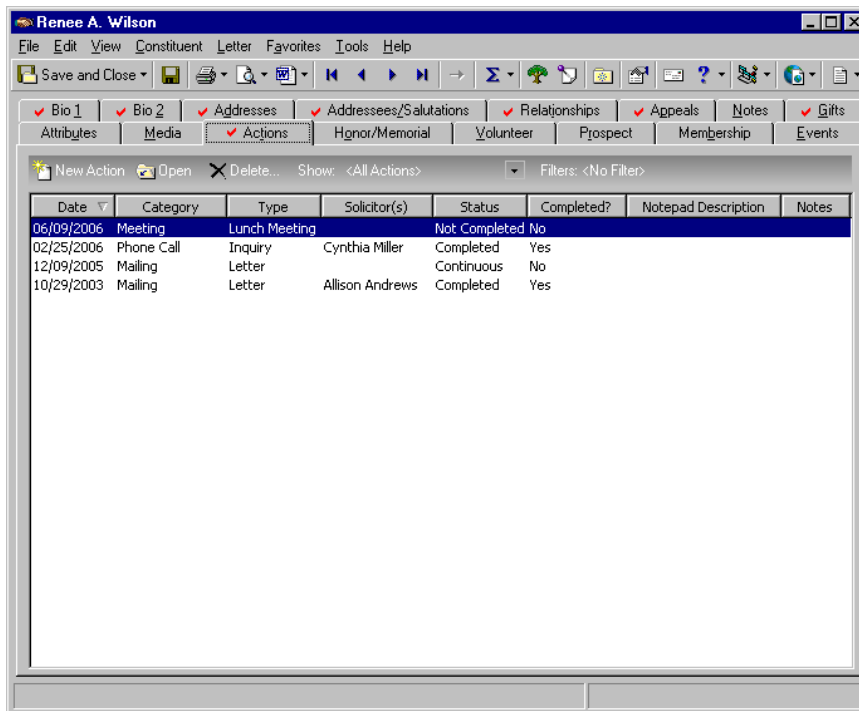
### ▶ Adding an attribute to an action record

Attributes can include activities, special requests, or important dates. You can use these steps to add an attribute to a constituent, event, or appeal action.

**Scenario:** Next week, you are having lunch with one of your prospects, Renee Wilson. Renee tells you she is a vegetarian. On her constituent record, add an attribute to indicate her preference.

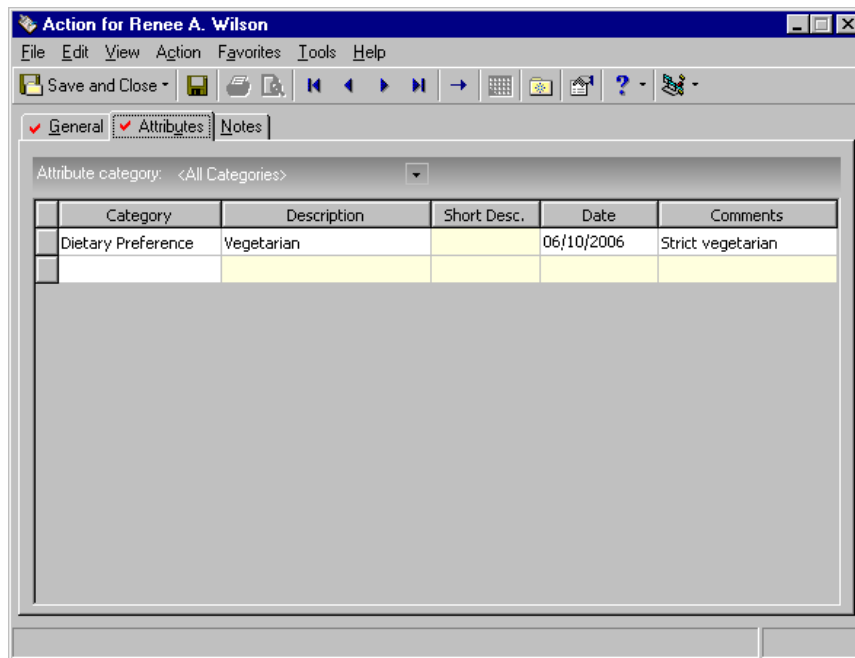
**Note:** Attributes are initially set up from the **Attributes** link of *Configuration*. For more information, see the *Configuration & Security Guide*.

1. From Renee Wilson’s constituent record, select the Actions tab. For more information about opening records, see “Access Constituent Records” on page 4.



2. Select Renee’s **Meeting** action and click **Open** on the action bar. The action record appears.

### 3. Select the Attributes tab.



4. In the **Category** column, select “Dietary Preference”.
5. In the **Description** column, select “Vegetarian”.
6. In the **Date** column, enter today’s date.
7. In the **Comments** column, enter “Strict vegetarian”.
8. On the toolbar, click **Save and Close**. You return to the Actions tab of Renee’s constituent record.
9. Click **Save and Close**.

## Notes Tab

The Notes tab stores information about the action. Notes are records you keep to remind yourself of something you heard, read, need to reference, or need to remember about the action.

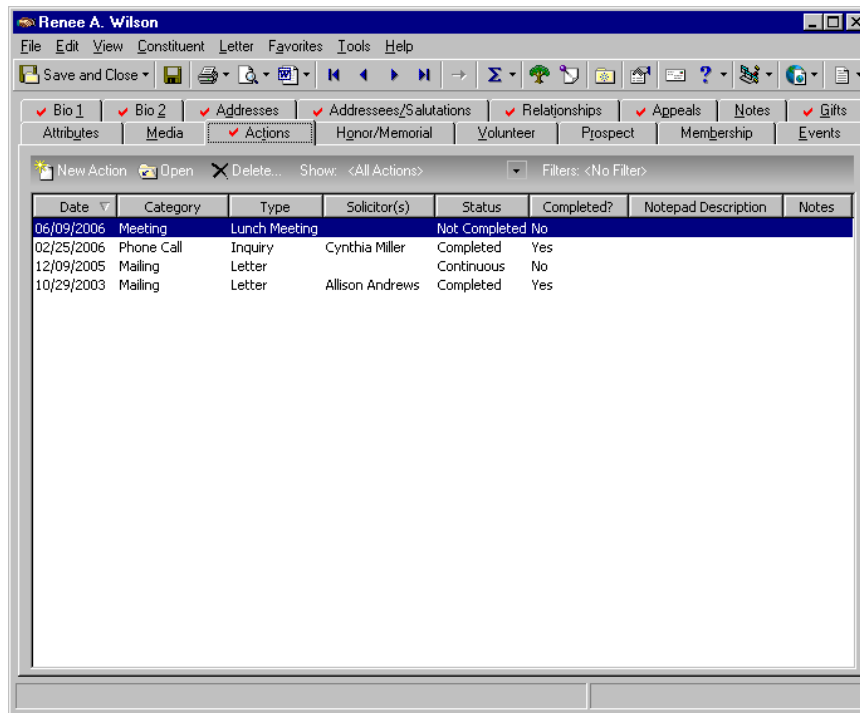


► **Adding a note to an action record**

The Notes tab makes it easy to maintain helpful pieces of information about a constituent, event, appeal.

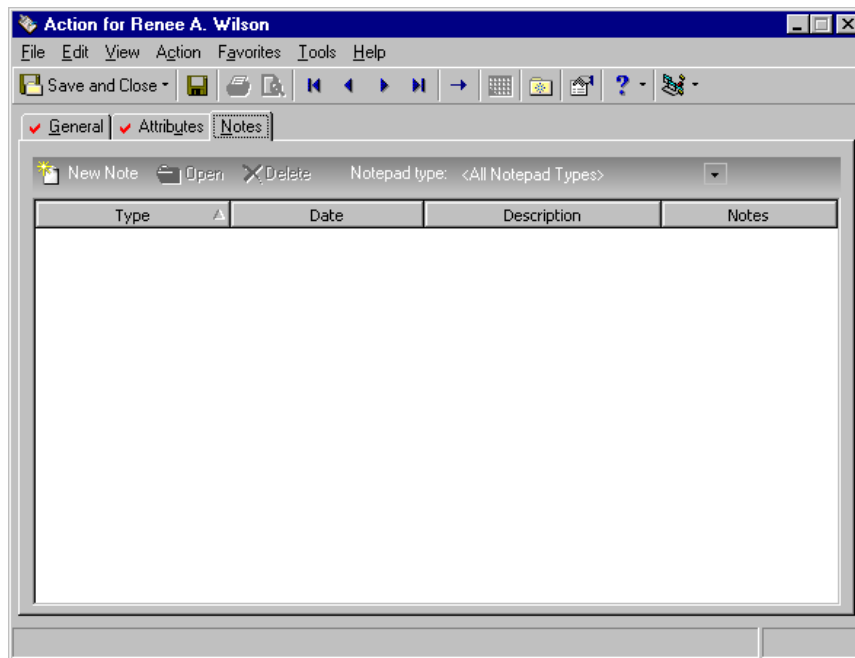
**Scenario:** Next week, you are having lunch with one of your prospects, Renee Wilson. Renee tells you she is a vegetarian. On her constituent record, add a note about her preference.

1. From Renee Wilson's constituent record, select the Actions tab. For more information about opening records, see "Access Constituent Records" on page 4.

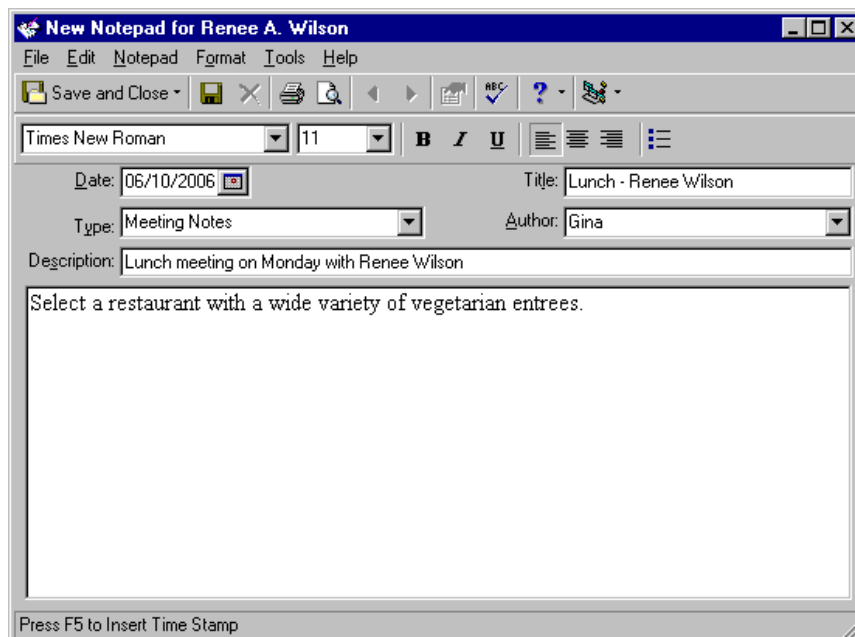


2. Select Renee's **Meeting** action and click **Open** on the action bar. The action record appears.

3. Select the Notes tab.



4. On the action bar, click **New Notepad**. The New Notepad screen appears.



**Tip:** You can easily import and export notepad contents. Right-click in the text box. From the menu that appears, select **Load from File** or **Save to File**.

5. In the **Date** field, enter today's date.
6. In the **Type** field, select "Meeting Notes".
7. In the **Title** field, enter "Lunch - Renee Wilson".
8. In the **Author** field, select "your name". You are entering this note.

9. In the **Description** field, enter “Lunch meeting on Monday with Renee Wilson”.

**Tip:** On a Notepad screen, you can press **F7** on your keyboard; select **Tools, Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT + F7** on your keyboard or select **Tools, Thesaurus** from the menu bar to access the thesaurus.

10. In the text box, enter “Select a restaurant with a wide variety of vegetarian entrees.”

When adding notes to a notepad on a record, you can add time stamps to designate who added text to the note and when the text was added. In the notepad grid, place your cursor in front of the section of the note you want to stamp and press **F5** on your keyboard. Your login name and today’s date appear before that section of text.

11. On the toolbar, click **Save and Close**. You return to the Notes tab of the action record. The note appears in the grid.

## Advocacy Actions

Nonprofits engage in advocacy whenever they work to change public policy. This means activities such as lobbying or partisan political activity, but it also means activities such as community organizing, working with the media, educating voters, researching and reporting on problems facing communities, conducting voter registration, protesting in the streets, and more.

**Note:** Like other action categories, you can globally add, change, or delete advocacy actions. For more information, see the *Global Add, Delete, & Change Guide*.

If your organization engages in advocacy activities, you can use action records with a category of **Advocacy** to record actions that your constituents take in response to an action alert, action email, appeal, or phone call initiated by you. Advocacy actions work differently than other actions in *The Raiser’s Edge*. Instead of recording an action you take upon a constituent (such as a phone call, lunch meeting, or visit), this specific action category tracks the type of action a constituent takes in response to a form of advocacy.

You can add advocacy actions manually to your database just as you can any other action category. When you use *Blackbaud NetAdvocacy*, you can download advocacy action data to *The Raiser’s Edge* from **Blackbaud NetCommunity** or *NetSolutions*. To download this data from **Blackbaud NetCommunity**, use the **Blackbaud NetCommunity** link on the Plug-Ins page of *The Raiser’s Edge*. To download this data from *NetSolutions*, use the **Download Transactions** link in *NetSolutions*.

**Note:** For information about activating your *Capwiz* subscription service, contact your Blackbaud account manager.

*Blackbaud NetAdvocacy* is powered by *Capwiz*. *Capwiz* is a subscription service that helps you publish informative alerts and calls to action on your Web site. From a Web page, for example, users can send email to influential individuals (such as federal, state, and local officials) and friends (tell-a-friend) to encourage support on particular causes. You can download advocacy action data at any time.

The number of actions that download to the constituent record equals the number of email recipients. For example, if Mark Adamson responds to one of your action alerts and sends an email to Congressman John Doe and Congresswoman Marianne Jones, you download two action records to the Actions tab of Mark’s constituent record. The *Capwiz* Advocacy date appears in the **Action date** field of the action record. Fields exist for the **Alert title** and **Issue**. The Advocacy type (Email) appears in the **Delivery method** field and the two advocacy actions are tied together using a single **Message ID**, which helps to make reporting easy.

If action data is downloaded from **Blackbaud NetCommunity**, two attributes can also appear on the Attributes tab of each action record: NetCommunity Email Source ID and NetCommunity Email Source. For example, if you send an electronic Quarterly Newsletter to your constituents with a link to a Save the Bay alert, the NetCommunity Email Source ID and NetCommunity Email Source attributes refer to the actual electronic newsletter you sent out (Quarterly Newsletter in this case). To see a chart of all fields, see “Field Mapping from *Capwiz* to Advocacy Actions” on page 263.

**Note:** To learn more about your constituent advocates, you can run an **Advocacy Detail Report**. You can also run individual and organization profiles to include advocacy action information. For more information, see the *Reports Guide* and the *Sample Reports Guide*.

For information about creating action alerts, see your *Capwiz* Site Control page. For information about *Blackbaud NetAdvocacy*, go to [www.blackbaud.com](http://www.blackbaud.com). For information about **Blackbaud NetCommunity** and how to download advocacy action data, see the **Blackbaud NetCommunity** help file. For information about *NetSolutions* and how to download advocacy action data, see the Downloading Transactions chapter of the *NetSolutions Guide*.

## Field Mapping from Capwiz to Advocacy Actions

This table shows where *Capwiz* field information appears on Advocacy action records once you use *Blackbaud NetAdvocacy* to download advocacy action data to *The Raiser's Edge* from **Blackbaud NetCommunity** or *NetSolutions*. For instructions on how to download advocacy action data from either, see the **Blackbaud NetCommunity** help file or see the Downloading Transactions chapter of the *NetSolutions Guide*. For information about *Blackbaud NetAdvocacy*, go to [www.blackbaud.com](http://www.blackbaud.com).

Capwiz Field	Action Field
Advocacy date	Action date
Advocacy time	Start time
Alert title	Alert title
Issue	Issue
Action type	Delivery method
Name	Recipient name
Message ID	Message ID
Message title	<i>Is not stored</i>

Capwiz Field	Action Field
Message	<i>Is not stored</i>
Email ID	NetCommunity Email Source ID action attribute - if there is a source email (downloaded only from <b>Blackbaud Netcommunity</b> )
Email subject	NetCommunity Email Source action attribute - if there is a source email and the email has s subject (downloaded only from <b>Blackbaud Netcommunity</b> )

## Deleting Action Records

You created the action record filing cabinet and added the necessary information. What happens when a file is no longer needed? One option is to delete the action record from the database. When you delete an action record, you remove not only that action, but all associated information, such as attributes and notes. In addition, if the action is associated with an action track, deleting it prevents any dependent actions from being generated. Take note of any associated actions before you decide to delete.

Another option, one we recommend, is to assign an action status of Closed or Completed. By doing this, you preserve the action for historic reference, but can easily omit it from any query, report, or find function by its Completed status.

### ▶ Deleting an action

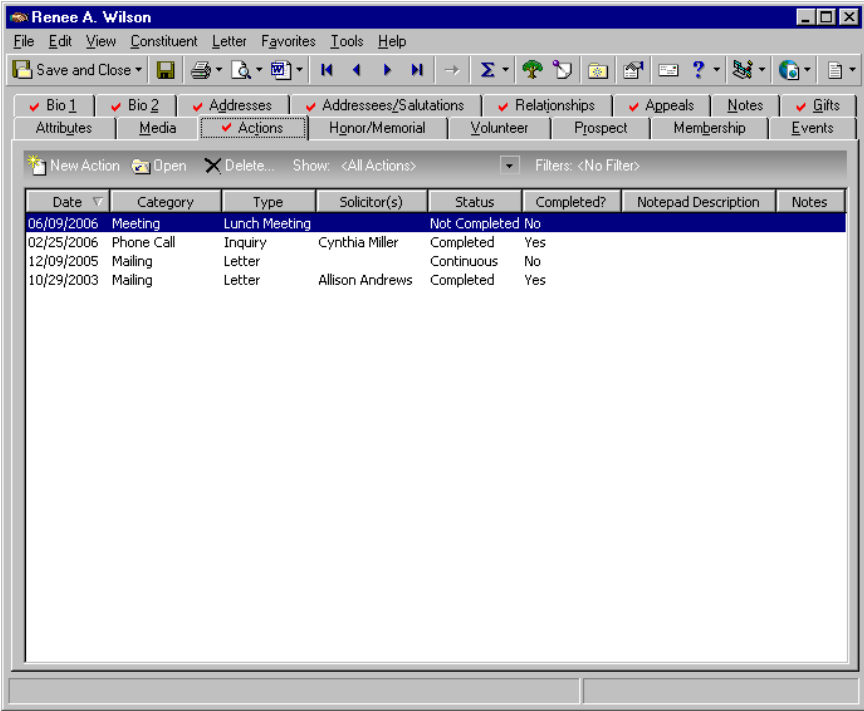
**Warning:** Before you delete an action, or any other record in *The Raiser's Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

This procedure shows you how to delete an action from a constituent record. You can delete an action from an appeal or event record the same way. Instead of deleting an action, you can assign a status of Closed or Completed. This way, the action remains in your database for historic purposes.

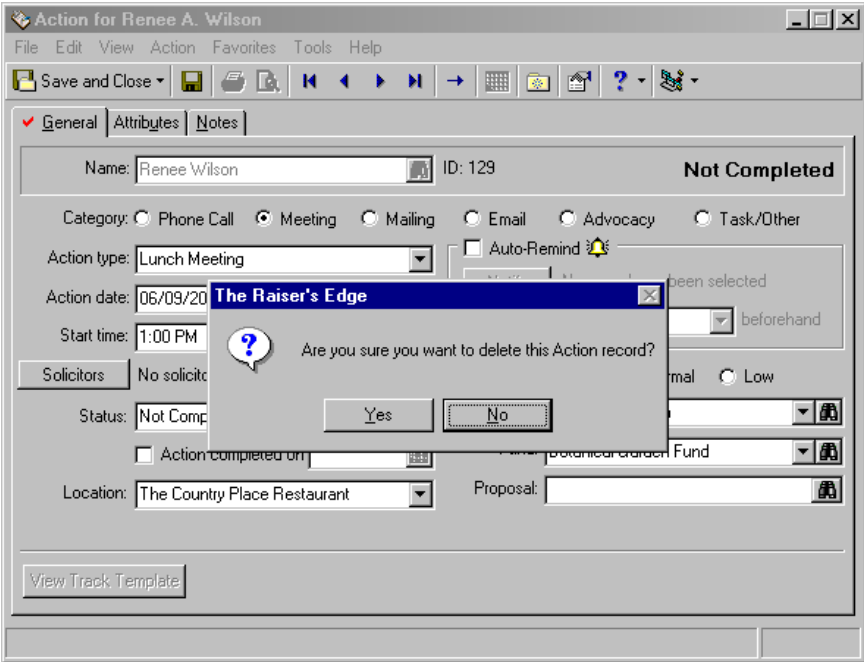
**Scenario:** You were planning to have lunch with one of your prospects, Renee Wilson, next week. Renee calls to cancel the lunch. She decides not to support your organization. Delete the action record.

1. From Renee Wilson's constituent record, select the Actions tab. For information about opening a constituent, see "Access Constituent Records" on page 4.

2. In the grid, select the action with the **Category** of Meeting.



3. On the action bar, click **Delete**. The action opens and a message appears, asking if you are sure you want to delete the action record.



4. Click **Yes**. The action is permanently deleted from your database and removed from the Actions tab of Renee's constituent record.

5. On the toolbar, click **Save and Close**.

# Action Tracks

**Note:** You can use action tracks as part of your moves management strategies. Moves management is a system of monitoring, developing, and continuing relationships with your donors. The term “moves management” refers to a system to move a constituent from suspect to prospect to donor. *Prospect Research Management* is also a great tool for moves management tracking. For more information about *Prospect Research Management*, see the *Prospect Data Entry Guide*.

Action tracks are a means of adding a predefined set or series of actions to a constituent, event, or appeal record. Tracks are added from the shell of *The Raiser's Edge* and can contain independent or dependent actions. Independent actions can be added to a record all at one time. Dependent actions are generated based on a change to a previous action in the track.

For example, you enter a new prospect into your database. At your organization, new prospects get a phone call, a newsletter, and a Hello letter. The phone call and the newsletter go out on the same day; the Hello letter goes out one week later. This is an ideal situation for an action track. You can set up a track where the first two actions take place on a certain date, and the track ensures the second part of the action track takes place one week later. Another example is when you enter a major donor prospect into your database. At your organization, major donor prospects receive a phone call, attend a lunch meeting, receive a thank-you note, newsletter, and pin. The phone call happens first. Based on the completion of the phone call, the lunch meeting is scheduled for one week later. After the lunch meeting, a thank-you note is sent out immediately. The newsletter and pin are sent about a week after the initial call. All these things can be added as an action track, with one action occurring as a result of the completion of another.

## Adding Action Tracks

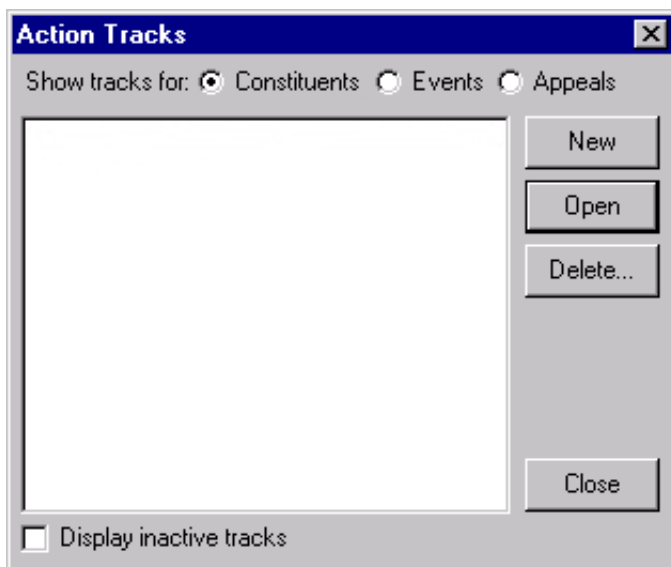
The first step in building an action track is to define the track name. You do this by selecting **Tools, Action Tracks** from the menu bar on the shell of *The Raiser's Edge*. This section shows you the basic steps for adding an action track. Once you create the track, you can add actions to it. Tracks are saved throughout your entire database, as opposed to just on your workstation. If you are no longer using a track, you can delete it entirely, or you can mark it as inactive. If you make a track inactive, it can be edited and deleted, when necessary. If a track is marked inactive while assigned, it remains inactive on the records to which it is assigned until the entire track is complete.

► **Adding an action track**

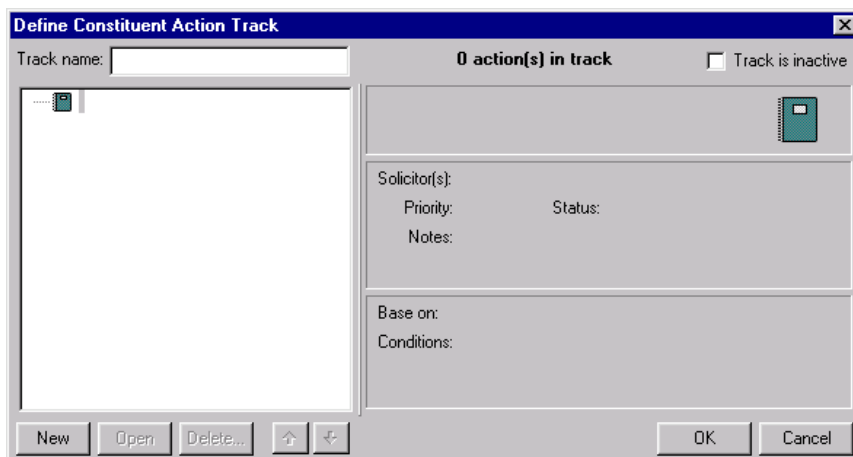
Action track names must be defined before you can add an action to a track. You do this by selecting **Tools, Action Tracks** from the menu bar on the shell of *The Raiser's Edge*. Tracks can be deleted or marked inactive if you no longer use them.

**Scenario:** You need to create an action track that will be assigned to all new prospective constituents. At your organization, new prospects receive a phone call and Hello letter. Add a new action track to manage these prospect actions.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.

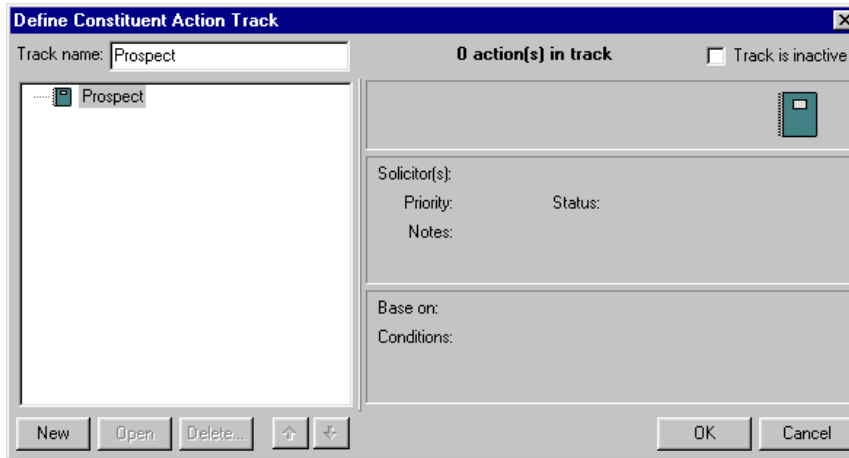


2. Mark the **Constituents** option. If you already added action tracks, they appear in the box on this screen. The Action Tracks screen displays all constituent tracks when you mark the **Constituents** option; all event tracks when you mark the **Events** option; and all appeal actions when you mark the **Appeals** option.
3. To include inactive tracks in the list, or tracks that are no longer being used, mark the **Display inactive tracks** checkbox. Do not mark the checkbox for this scenario. You only want to view active tracks.
4. To add a new track, click **New**. The Define Constituent Action Track screen appears.

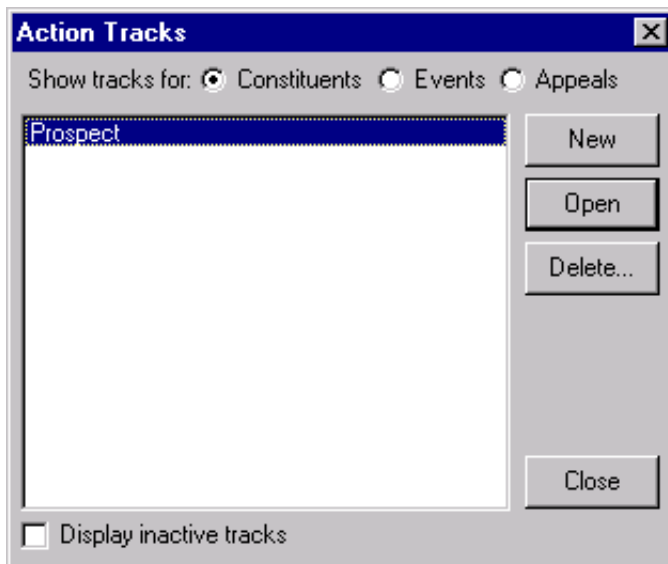




5. In the **Track name** field, enter “Prospect”.



6. Click **OK**. You return to the Action Tracks screen. The name of the track appears in the box on this screen.



7. Click **Close**.

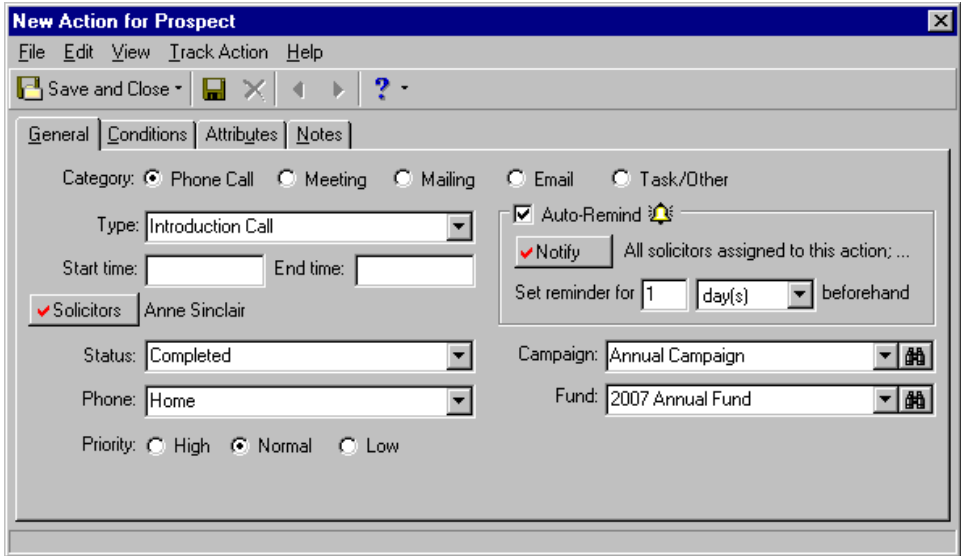
## Managing Action Tracks

Once you create the basic structure for an action track, you can add actions to create a sequence. Some actions are independent and others are dependent upon the completion of an earlier action, such as a meeting or phone call. You can add an unlimited number of actions to a track, but keep in mind all actions should have a specific theme in common, such as the previous prospect welcome scenario.

The strength of an action track is its ability to automatically maintain a sequence of related actions that can be independent or dependent upon the completion of another. With this functionality, you can create the track, add the actions, define their terms, and set the series in motion. *The Raiser's Edge* keeps track of which actions have been assigned, which ones need to be generated, when they are scheduled to occur, and when you need to be reminded. Tracks, in essence, simulate a hierarchical process or checklist of actions for a constituent, event, or appeal.

**Note:** The category of **Advocacy** is not available on the Actions Track screen.

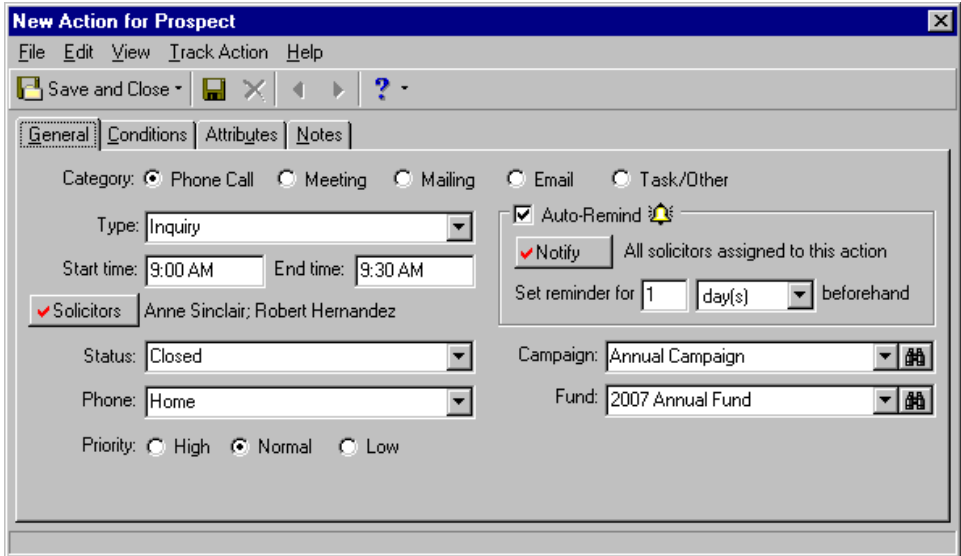
On the Actions Track screen, when you create or open an action track, the Define Action Track screen appears. When you click the **New** button, the New Action screen appears.



Constituent, event, and appeal action track records are identical. All three records contain four tabs: General, Conditions, Attributes, and Notes. These tabs contain fields that track the type, dates, times, locations, conditions, and special preferences associated with the action.

## General Tab

The General tab is where you define the **Category** of the action, the **Type**, the **Start time**, **End time**, **Solitors**, **Status**, **Phone**, **Priority**, **Campaign**, and **Fund**. You can also mark the **Auto-Remind** checkbox; select the persons you want to remind about this action; and determine how many days, weeks, or months beforehand the reminder should be sent.



## Conditions Tab

The Conditions tab is where you define the terms associated with the actions. It determines whether an action is independent or if its creation is dependent on the completion or specific change of another action.

The screenshot shows a dialog box titled "New Action for Prospect" with a menu bar (File, Edit, View, Track Action, Help) and a toolbar (Save and Close, Save, Cancel, Previous, Next, Help). The "Conditions" tab is selected. The text reads: "The creation of this action can be based on when this track is assigned, or when specific conditions of another action in this track are satisfied. If you choose to base it on when the track is assigned, place the track name in the 'Based on' field. If you choose to base it on another action in the track, place that action in the 'Based on' field, and select an action query with criteria as the conditions that must be satisfied." The "Based on:" field contains "Prospect" and the "Action query:" field is empty. Below, the question "When this action is created, how should the action date be determined?" has two options: "Use date action is created" (selected) and "Use [ ] [ ] from date action is created".

## Independent Actions

An independent action has no special conditions associated with it and can be generated by you at any time. This type of action stands alone and is not contingent upon any other action. On the Conditions tab of an independent action, the **Based on** field should contain the action track name. This tells *The Raiser's Edge* that the creation of the action is unrelated to any other. Think of independent actions as "parent" actions or cornerstones for the track. The creation of dependent actions is directly based on predetermined changes to these parent actions.

The screenshot shows a dialog box titled "Action for Membership Track" with a menu bar (File, Edit, View, Track Action, Help) and a toolbar (Save and Close, Save, Cancel, Previous, Next, Help). The "Conditions" tab is selected. The text reads: "The creation of this action can be based on when this track is assigned, or when specific conditions of another action in this track are satisfied. If you choose to base it on when the track is assigned, place the track name in the 'Based on' field. If you choose to base it on another action in the track, place that action in the 'Based on' field, and select an action query with criteria as the conditions that must be satisfied." The "Based on:" field contains "Membership Track" and the "Action query:" field is empty. Below, the question "When this action is created, how should the action date be determined?" has two options: "Use date action is created" (selected) and "Use [ ] [ ] from date action is created".

## Dependent Actions

The creation of a dependent, or “child” action is totally contingent upon satisfying conditions related to the parent action. For example, you send out a mailing to your trustees and follow up with a phone call one week later. In this example, the mailing is the independent action and is created as soon as you add it to the track. The follow-up call is the dependent action and is set up with a condition to be automatically generated when the mailing status is changed to Completed. The date of the phone call action is one week after the date of the mailing. To make this sequence work, the mailing action (independent) needs to be in the **Based on** field of the dependent (phone call) action. In addition, there must be a query in the **Action query** field whose criteria defines the conditions that must be satisfied before the dependent action can be created. Lastly, you specify an action date of “1 week(s)” from the date of the mailing.

**Action for Membership Track**

File Edit View Track Action Help

Save and Close [ ] [ ] [ ] [ ] [ ] [ ] [ ] [ ]

General Conditions Attributes Notes

The creation of this action can be based on when this track is assigned, or when specific conditions of another action in this track are satisfied. If you choose to base it on when the track is assigned, place the track name in the "Based on" field. If you choose to base it on another action in the track, place that action in the "Based on" field, and select an action query with criteria as the conditions that must be satisfied.

Based on: Mailing - Brochure [ ] [ ]

Action query: Action Track: Completed = Yes [ ] [ ]

When this action is created, how should the action date be determined?

Use date action is created

Use [ ] [ ] from date action is created

Use 1 week(s) from date of Mailing - Brochure

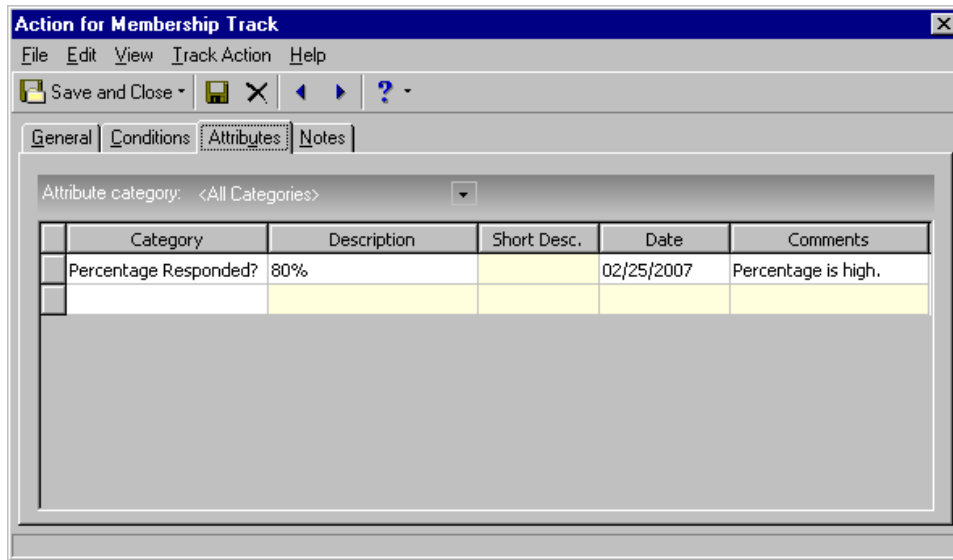
You can choose a previously created query or create a new one through the action track that directly pertains to the current series of actions. For example, in the above example, your query criteria will be “Action status equals Completed”. You can add a new query with this condition. In the **Action query** field on the New Action screen, click the binoculars. The Open Query screen appears. Click the **Add New** button to create a new action query. From the list of available query fields, click the plus sign beside **Action Information** to expand the Available Fields list. Double-click **Status**. The Edit Field Criteria screen appears. From the Edit Field Criteria screen, select “equals” as the **Operator** and “Completed” as the **Value**. Click **OK**. From the menu bar, select **File, Close**. A message appears asking if you want to save your query. Click **Yes**. Enter a name for the query. Click **Save**. The new query automatically appears in the **Action query** field. Once the Completed condition is satisfied by the independent action, **The Raiser’s Edge** generates the dependent (phone call) action. For more information about creating queries, see the Query chapter of the *Query & Export Guide*.

Several options are available for specifying a dependent action date. You can mark the **Use date action is created** option or define a specific period of time in days, weeks, or months to follow by using **Use [ ] [ ] date from action is created** or **Use [ ] [ ] date from Mailing** (where “Mailing” is the name of the independent action).

The three fields on the Conditions tab, **Based on**, **Action query**, and action date, all work together to define the criteria necessary for **The Raiser’s Edge** to generate a dependent action. Following scenarios and procedures walk you through the steps required to add an independent action, a dependent action, and assign a track to a constituent or event record.

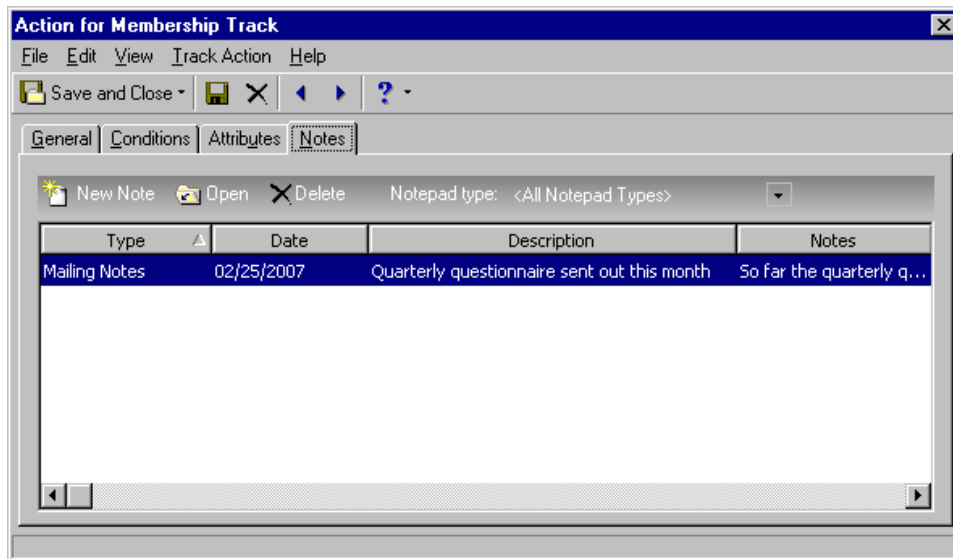
## Attributes Tab

The Attributes tab helps you identify specific attributes for the action. Attributes are the qualities, characteristics, and preferences associated with the action. These attributes can include activities, special requests, or important dates.



## Notes Tab

The Notes tab helps you remember information about the action. Notes are records you keep to remind yourself of something you heard, read, need to reference, or need to remember about the action.



To add a note from the Notes tab, click **New Note** on the action bar. The New Notepad screen appears so you can add the date, note type, note title, author name, note description, and text. Once you add your note and information on the New Notepad screen, click **Save and Close** on the toolbar. Your note appears in the grid on the Notes tab of the action track record. Notes on an action record and action track record work the same way as they do on a constituent record. To find out more about notes in *The Raiser's Edge*, see "Notes" on page 179.

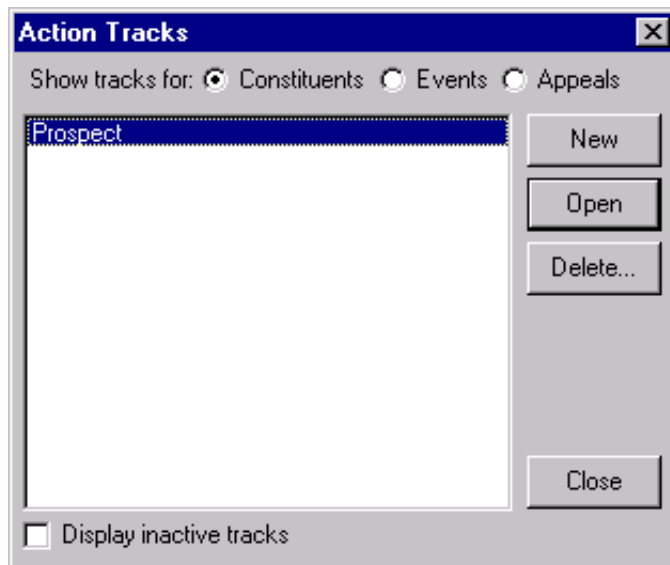
#### ▶ Adding an independent action to an action track

An independent action has no special conditions associated with it and can be generated at any time. This type of action stands alone and is not contingent upon any other action.

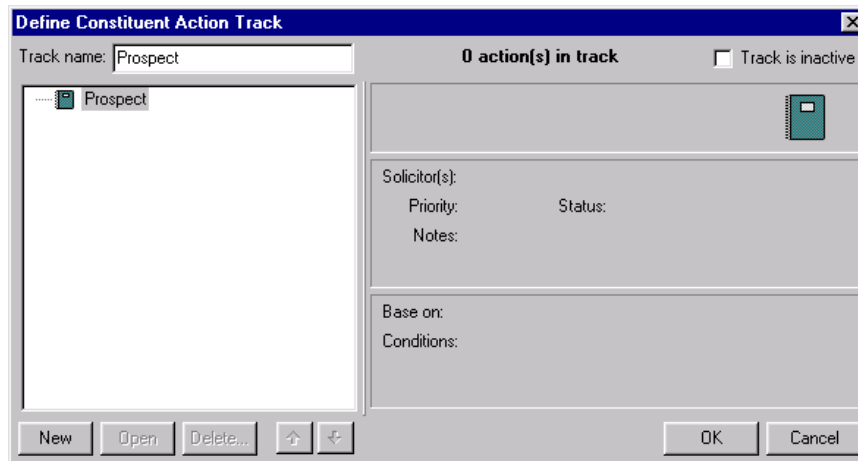
**Scenario:** At your organization, new prospects receive a phone call. Two weeks later, they receive a Hello letter. Using the Prospect track, add the actions necessary to manage a new prospect record. Remember to set up the Hello letter, so it is mailed two weeks after the initial phone call. If you have not added a Prospect track, see "Adding an action track" on page 267.

**Note:** On the Define Action Tracks screen, you can click **Open** to open an existing action track for editing or viewing. Click **Delete** to delete an existing action track if the track does not have dependent actions.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



2. Select the Prospect action track and click **Open**. The Define Action Track screen appears. For information about opening an action track, see "Opening an action track" on page 240.



- To add an action to the track, click **New** on the Define Constituent Action Track screen. The New Action screen appears.

- Select the General tab.
- In the **Category** field, mark the **Phone Call** option.

In the **Type** field, select “Introduction Call”.

**Tip:** If you know the solicitor’s name, you can type it directly into the **Solicitors** field on the action record.

- Click **Solicitors**. The Solicitors Assigned to this Track Action screen appears.

Solicitor	
	Anne Sinclair

- To assign only active solicitors, select **First active solicitor for constituent**, **All of constituent’s active solicitors**, **Constituent’s active solicitors based on campaign and fund**, or **Constituent’s active solicitors with solicitor type [ ]**. To assign a particular solicitor, select **Specific solicitors**. When you click in the grid, the binoculars appear so you can search for that solicitor in your database. By assigning a solicitor to an action, you make the solicitor responsible for making sure the assigned action is completed. For this scenario, select **Specific solicitors** and search your database for Anne Sinclair. When found and selected, her name appears in the **Solicitor** grid.



8. Click **OK**. You return to the New Action screen.
9. Mark the **Auto-Remind** checkbox. The fields in the **Auto-Remind** frame are enabled.
10. Click **Notify**. The Action Notification screen appears.

Users			Notify these users		
User Name	Constituent	Outlook Name	User Name	Constituent	Outlook Name
Bonnie			David		
Emilie			Dana		
Gina					
Jennifer					
Jenny					
Kristy					
Rob					
Supervisor					

Notify using  Raiser's Edge reminders  Outlook Appointments  Both

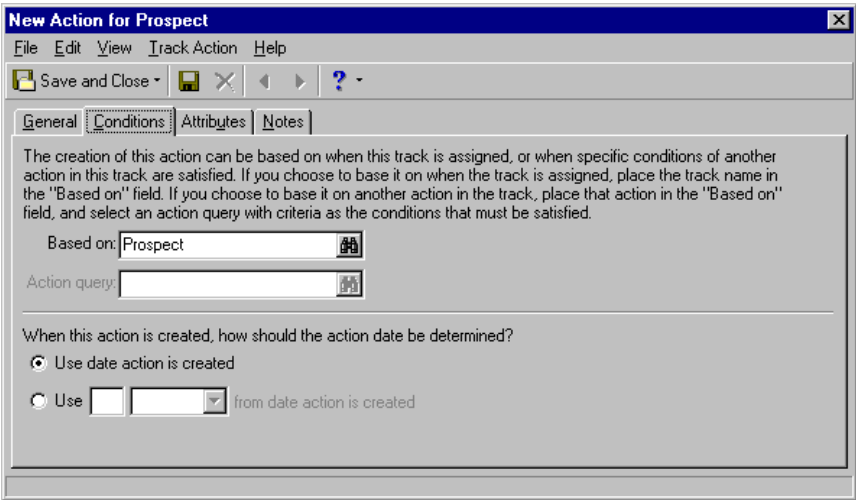
11. To determine who should be notified about this action, select **All solicitors assigned to this action**, **All solicitors assigned to this constituent**, or **User who assigns track**.

**Note:** The user names listed on the Action Notification screen are pulled directly from the Users group in *Administration*. For more information, see the Security chapter of the *Configuration & Security Guide*.

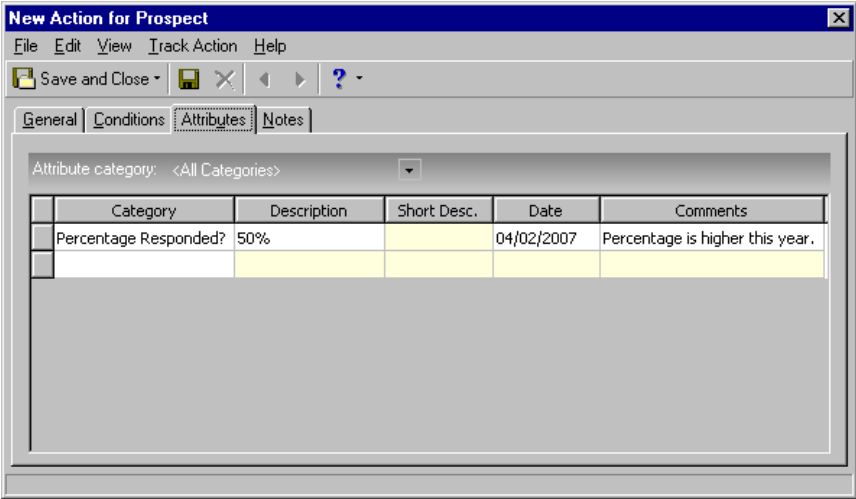
12. To select others who need to be notified about the action, from the **Users** box, select the name and click the single right arrow. This moves the name you select over to the **Notify these users** box. That person will be reminded automatically of this action when she logs into *The Raiser's Edge*.
13. Click **OK**. You return to the General tab of the action record.
14. In the **Set reminder for** field, enter "1" in the first box and select "day(s)" in the second box. This information tells *The Raiser's Edge* you or another user want to be reminded of this action one day before the date in the **Action date** field.
15. Enter additional action information on the General tab as shown in the picture under step 3. For more information about adding action information, see "Adding Action Records" on page 245.

**Note:** If the action is dependent on the completion of another action, make sure the action name is in the **Based on** field.

- 16. On the New Action screen, select the Conditions tab. Because this action is independent of any other action, make sure the track name, "Prospect", is showing in the **Based on** field.

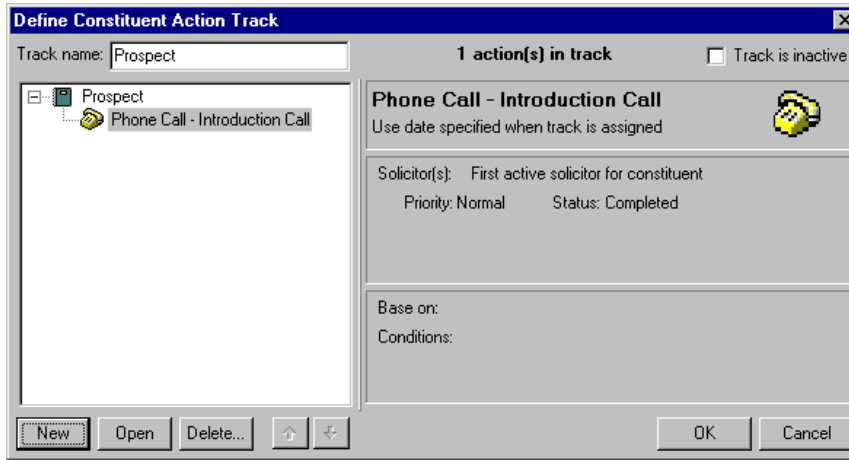


- 17. In the **When this action is created, how should the action date be determined?** frame, mark the **Use date action is created** option.
- 18. Select the Attributes or Notes tab.



- 19. Enter attributes and notes concerning this action. If an action is not complete, you may find it helpful to wait until after the action is completed to enter your most relevant notes. For information about entering attributes and notes, see "Attributes Tab" on page 272 and "Notes Tab" on page 272.

20. On the toolbar, click **Save and Close**. You return to the Define Action Track screen.



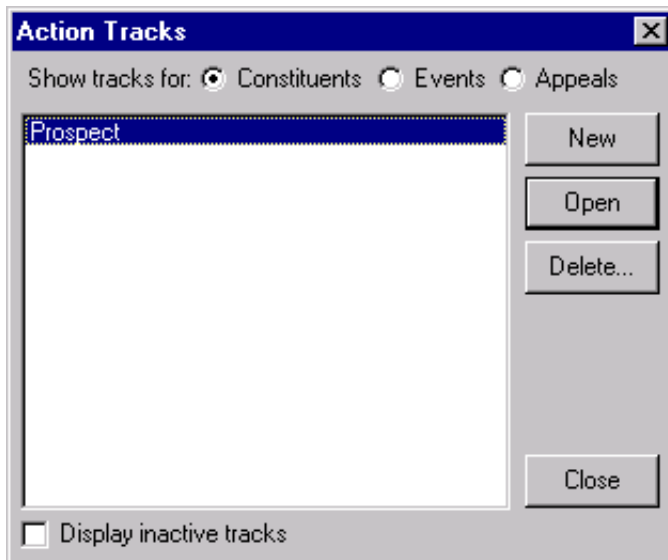
21. To close the Define Action Track screen, click **OK**. You return to the Actions Track screen.  
22. Click **Close**.

► **Adding a dependent action to an action track**

Before *The Raiser's Edge* can create a dependent, or child action, you first need to satisfy the conditions associated with the independent, or parent, action.

**Scenario:** Once you create the first action in your Prospect action track, you need to add the second action, which is dependent upon the completion of the first one. At your organization, new prospects get a Hello letter two weeks after their initial phone call. Set up the second action so *The Raiser's Edge* will generate the Hello letter two weeks after the initial phone call. If you have not added a Prospect track, see "Adding an action track" on page 267. If you have not set up the first independent action, see "Adding an independent action to an action track" on page 273.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



2. Select "Prospect" and click **Open**. The Define Action Track screen appears. For information about opening an action track, see "Opening an action track" on page 240.

**Note:** If the action has the **Category of Mailing**, in the **Letter** field, you can quickly create a letter directly from the action record. Click the Microsoft *Word* icon in the **Letter** field. For more information about creating letters, see "Quickly writing a letter from the Letter menu of a constituent record" on page 210. You can follow the same instructions to create your action letter here.

3. To add an action to the track, click **New**. The New Action screen appears.

The screenshot shows the "New Action for Prospect" dialog box with the following details:

- Category:**  Mailing (Other options: Phone Call, Meeting, Email, Task/Other)
- Type:** Letter
- Start time:** [ ] **End time:** [ ]
- Solicitors:**  Anne Sinclair
- Status:** Not Completed
- Letter:** Hello Letter
- Priority:**  Normal (Other options: High, Low)
- Auto-Remind:**  (All solicitors assigned to this action)
- Notify:**  (Set reminder for 1 week(s) beforehand)
- Campaign:** Annual Campaign
- Fund:** 2007 Annual Fund

4. Select the General tab.
5. In the **Category** field, mark the **Mailing** option.
6. Enter additional action information on the General tab as shown in the previous picture. For more information about adding action information, see "Adding Action Records" on page 245.

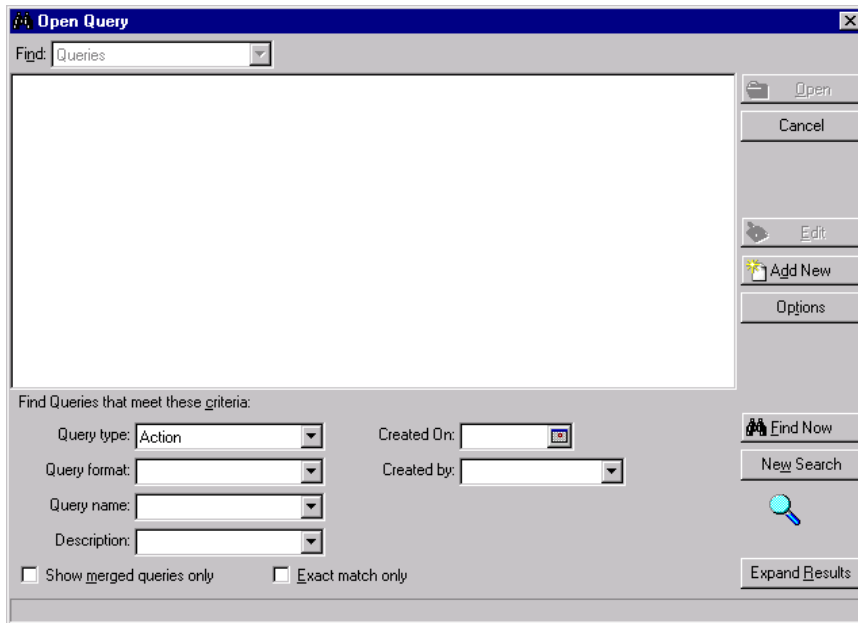
**Note:** If the action is dependent on the completion of another action, make sure the action name is in the **Based on** field.

7. Select the Conditions tab. Because this action is dependent on the completion of the Introduction Call, click the binoculars and search for the action, "Phone Call - Introduction Call", in the **Based on** field.

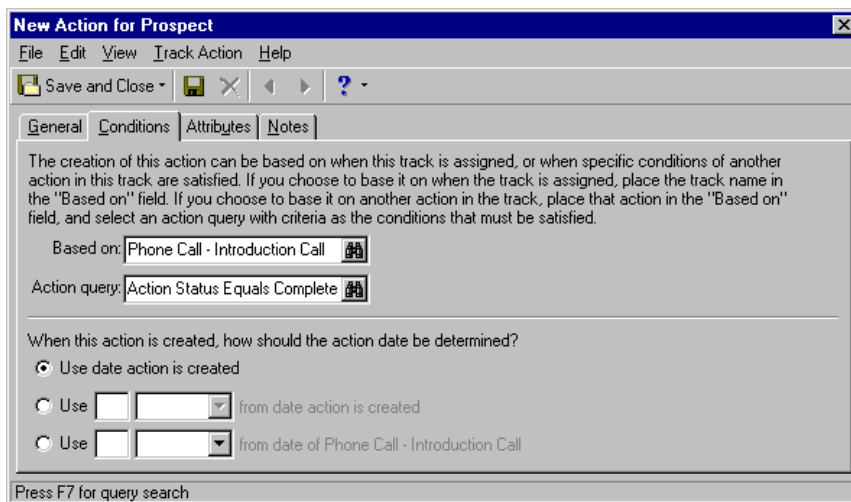
The screenshot shows the "New Action for Prospect" dialog box with the following details:

- Based on:** Phone Call - Introduction Call
- Action query:** [ ]
- When this action is created, how should the action date be determined?**
  - Use date action is created
  - Use [ ] from date action is created
  - Use [ ] from date of Phone Call - Introduction Call

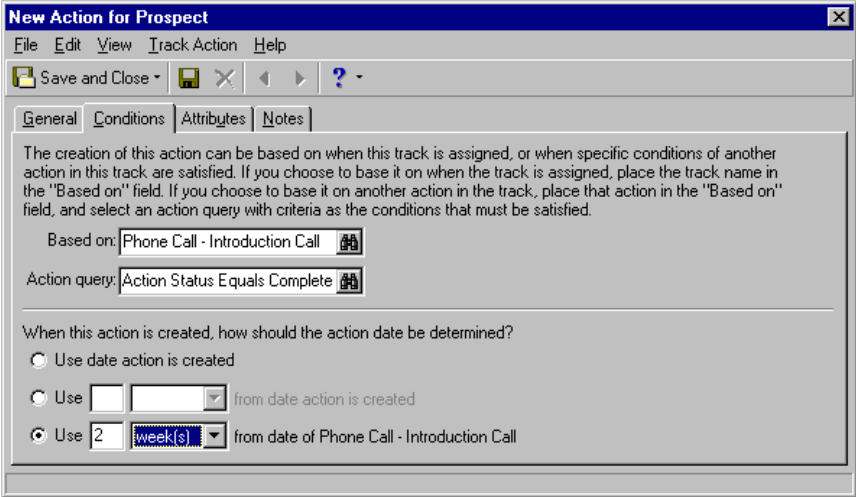
8. In the **Action query** field, click the binoculars. The Open Query screen appears. From this screen, choose a preexisting action query or click the **Add New** button to create a new action query.



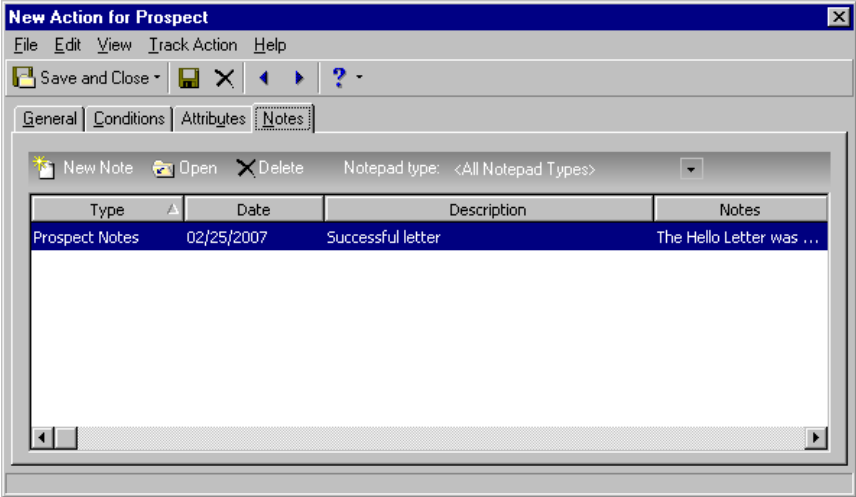
9. Click **Add New**. You want to add a new query. The New Action Query screen appears.
  - a. In the **Available Fields** box, click the plus sign beside **Action Information** to expand the Fields list.
  - b. Scroll down and double-click **Status**. The Edit Field Criteria screen appears.
  - c. Select “equals” as the **Operator** and “Completed” as the **Value**.
  - d. Click **OK**. You return to the New Action Query screen.
  - e. On the toolbar, click **Save**. The Save Query As screen appears.
  - f. In the **Query name** field, enter “Action Status Equals Completed”.
  - g. Click **Save**. You return to the Query screen.
  - h. Click the “X” on the top right-hand corner of the screen to close it. The new query appears in the **Action query** field.



- 10. In the **When this action is created, how should the action date be determined?** frame, mark the **Use [ ] [ ] from date of Phone Call - Introduction Call** option and enter “2” in the first field and select “week(s)” in the second field. This indicates to *The Raiser’s Edge* you want the date of this action to be two weeks later than the date of the Phone Call action.

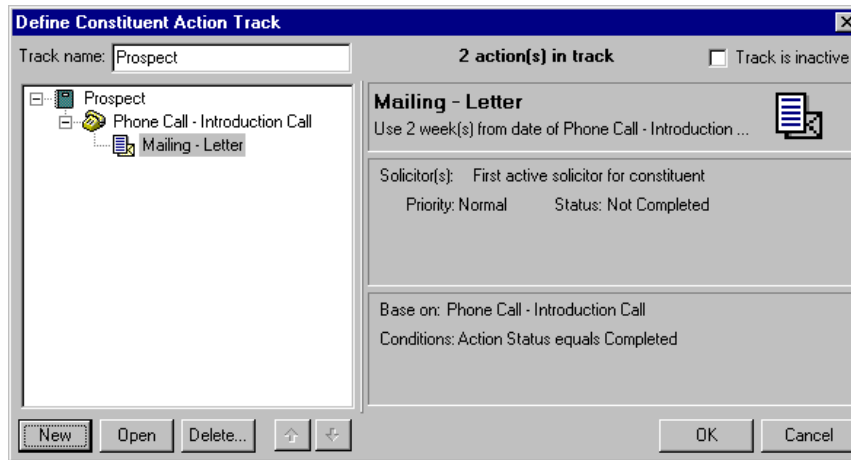


- 11. Select the Attributes or Notes tab. For information about entering attributes and notes, see “Attributes Tab” on page 272 and “Notes Tab” on page 272.



- 12. Enter attributes or notes concerning this action. Because this action has not been completed, you may find that you will want to add your most relevant notes after the action has been completed.

13. On the toolbar, click **Save and Close**. You return to the Define Action Track screen.



14. To close the Define Action Track screen, click **OK**. You return to the Actions Track screen.
15. Click **Close**.

## Assigning Action Tracks

Once you define an action track and add actions to the track, you then need to assign it. We recommend you use the Assign Track Wizard for this task. The assignment can start from the first action defined or from any action in the track. You can use the Assign Track Wizard to assign an action track to a single constituent, event, or appeal record; or to a group of constituent, event or appeal records.

► **Assigning an action track to one constituent or a group of constituents**

Once you define an action track and add actions to the track, you must assign it to one constituent, event, or appeal record; or to a group of constituent, event, or appeal records. The following procedure shows you how to assign an action track to a single constituent record. You can use the same wizard to assign an action track to a group of constituents. You can also follow the steps to assign an action track to one event or appeal record, or to a group of event or appeal records.

**Scenario:** Cynthia Miller is one of your major donor prospects. Use the Assign Track Wizard to assign the Prospect track to Cynthia's record. This track will add your two prospect actions, Phone Call and Hello letter, to Cynthia's constituent record.

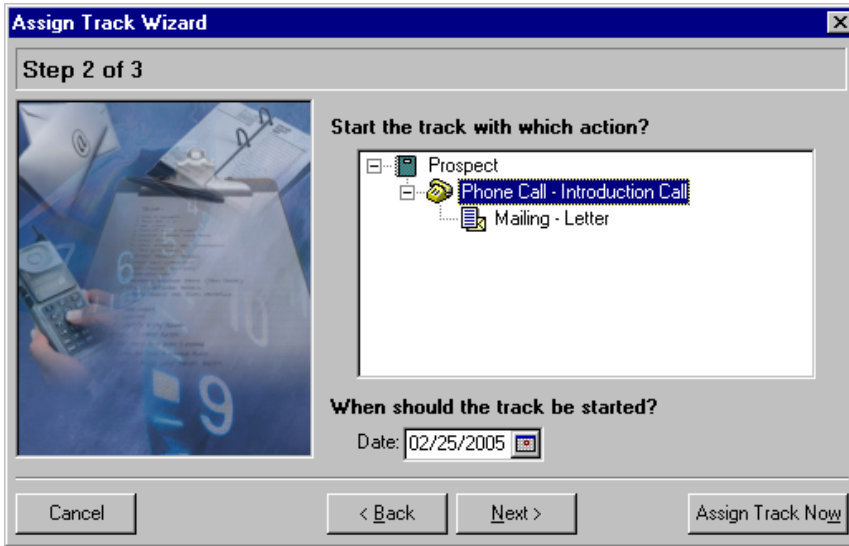
1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Assign Constituent Action Tracks**. The Assign Track Wizard screen appears.

**Note:** On any of the wizard screens, you can click **Cancel** if you want to cancel the Assign Track Wizard process. If you choose to accept all parameters on the wizard screen, click **Assign Track Now**. This begins the process of previewing, creating, and assigning action tracks to a constituent, event, or appeal; or group of constituents, events, or appeals.

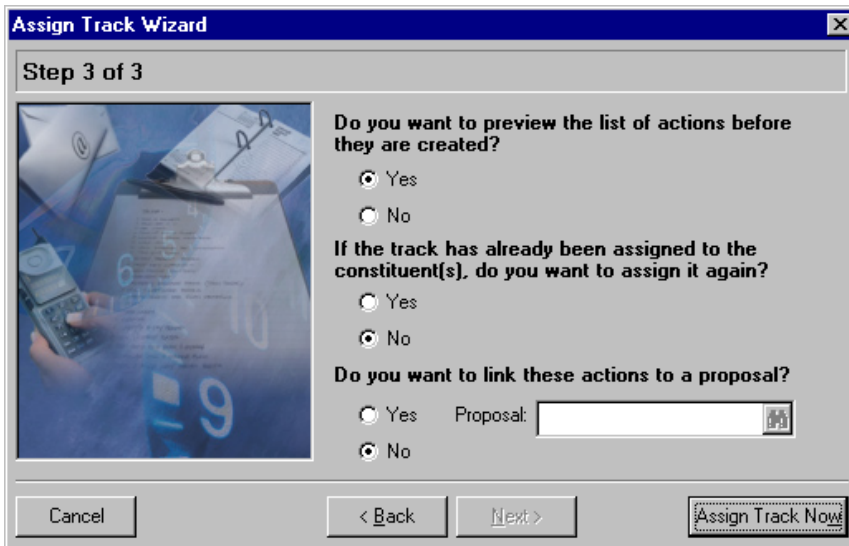
2. In the **Which track do you want to assign?** field, select "Prospect".
3. Under **To which constituent(s) should this track be assigned?**, mark the **One constituent** option. Click the binoculars in the selected field and search for Cynthia Miller.



- To move forward to the Step 2 of 3 screen, click **Next**.

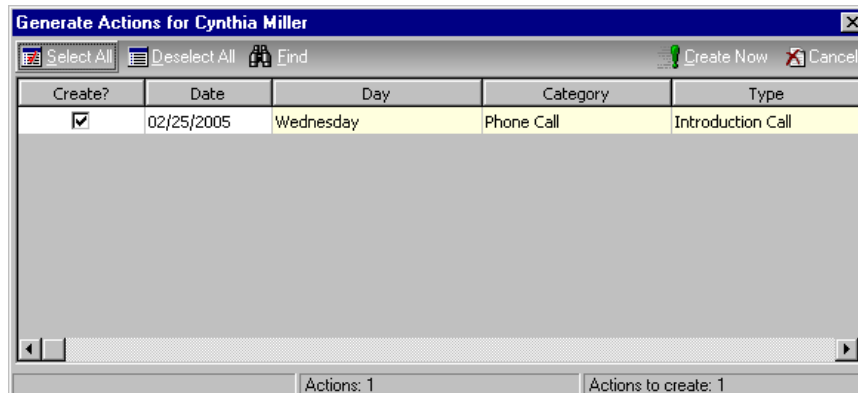


- On the Step 2 of 3 screen, under **Start the track with which action?**, select “Phone Call - Introduction Call”.
- Under **When should the track be started?**, enter today’s date.
- To move forward to the Step 3 of 3 screen, click **Next**.

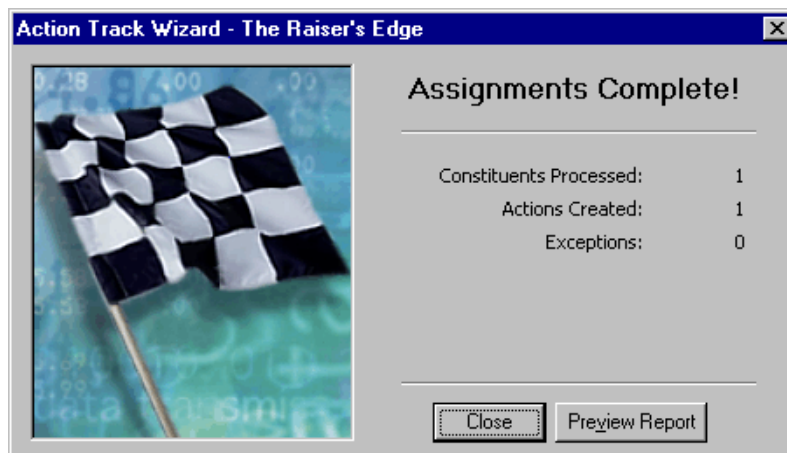


- Under **Do you want to preview the list of actions before they are created?**, mark **Yes**.
- Under **If the track has already been assigned to the constituent, do you want to assign it again?**, mark **No**.
- Under **Do you want to link these actions to a proposal?**, mark **No**.

11. To assign the action track, click **Assign Track Now**. The Generate Actions screen appears.



12. Make sure the checkbox in the **Create?** column is marked.
13. On the action bar, click **Create Now**. The Assigning Track progress screen appears. Then the Assignments Complete screen appears to indicate the wizard is finished. The Assignments Complete screen shows the number of constituents processed, the actions created, and any exceptions.



14. To exit, click **Close**. To generate a control report listing process statistics and any exceptions found, click **Preview Report**.

## Editing and Deleting an Action in an Action Track

Once you add an action to an action track, you can edit and make changes to the track, unless it has been marked inactive. Action tracks that have already been generated or assigned are not automatically updated when changes are made to the action. Dependent actions that have not yet been generated or assigned may be affected by changes made to the parent action. Be aware of the conditions you define when you create the action, to make sure your dependent actions still meet your new criteria.

You can delete an action from a track at any time, as long as the track is not marked inactive. Deleting an action from a track does not affect the action, as long as it has already been generated and assigned to a constituent or event record. The action, however, no longer references the track. Deleting an action with associated dependent actions causes those actions to be deleted as well. Pay careful attention to all associated actions before deleting.

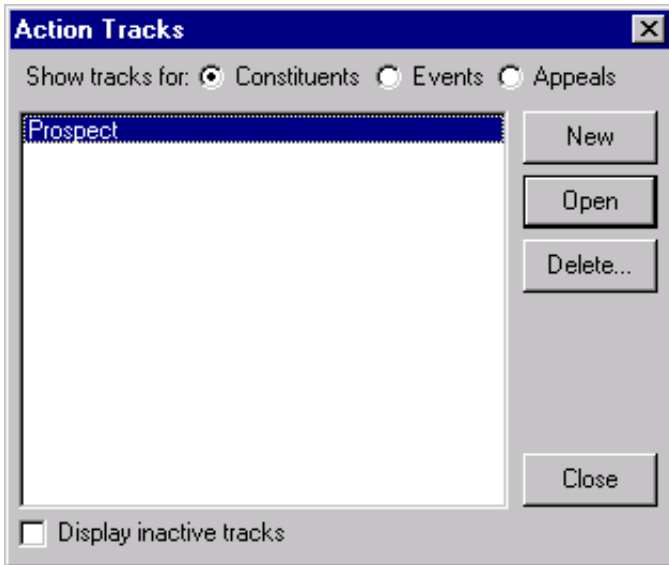
### ► Editing an action in an action track

**Warning:** If the query selected for a dependent action is edited or a different query is selected, the creation of ungenerated actions may be affected.

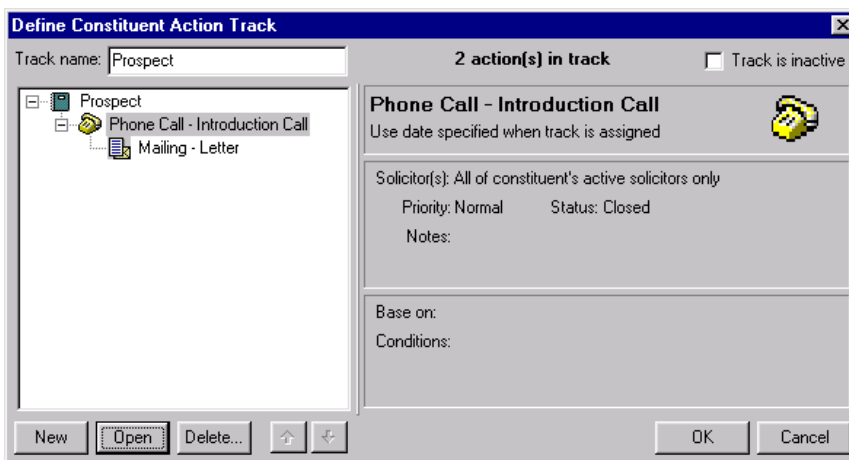
Once you add an action to an action track, you can edit and make changes to the track, unless it has been marked inactive.

**Scenario:** The introduction phone call action you assign to all new prospect records has Home selected as the phone type. You learn from one of your solicitors that most prospects prefer to be called at work. Edit the Prospect action track and change the phone type on the Phone Call action to Business.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



2. Select "Prospect" and click **Open**. The Define Constituent Action Track screen appears.



3. Select “Phone Call - Introduction Call” and click **Open**. The Action screen appears.

The screenshot shows the 'Action for Prospect' dialog box with the following settings:

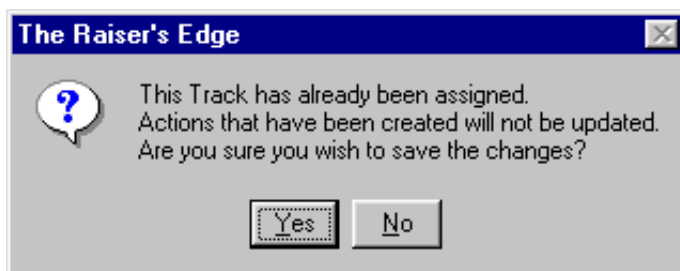
- Category:  Phone Call
- Type: Introduction Call
- Status: Completed
- Phone: Home
- Priority:  Normal
- Auto-Remind:  (Notify)
- Set reminder for: 1 day(s) beforehand
- Campaign: Annual Campaign
- Fund: 2007 Annual Fund

4. In the **Phone** field, select “Business”.

The screenshot shows the 'Action for Prospect' dialog box with the following settings:

- Category:  Phone Call
- Type: Introduction Call
- Status: Completed
- Phone: Business
- Priority:  Normal
- Auto-Remind:  (Notify)
- Set reminder for: 1 day(s) beforehand
- Campaign: Annual Campaign
- Fund: 2007 Annual Fund

5. On the toolbar, click **Save and Close**. You return to the Define Constituent Action Track screen.
6. Click **OK**. If your track has already been assigned to a constituent or a group of constituents, you receive a message asking if you are sure you wish to save the changes.

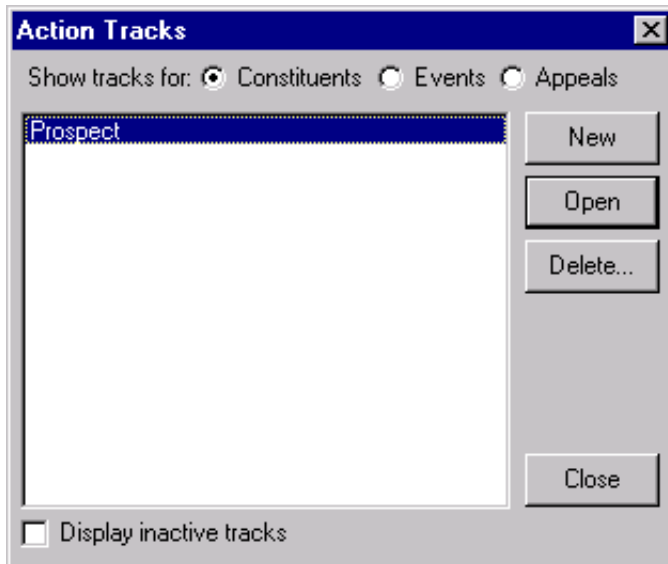


7. Click **Yes**. You return to the Action Tracks screen.
8. Click **Close**.

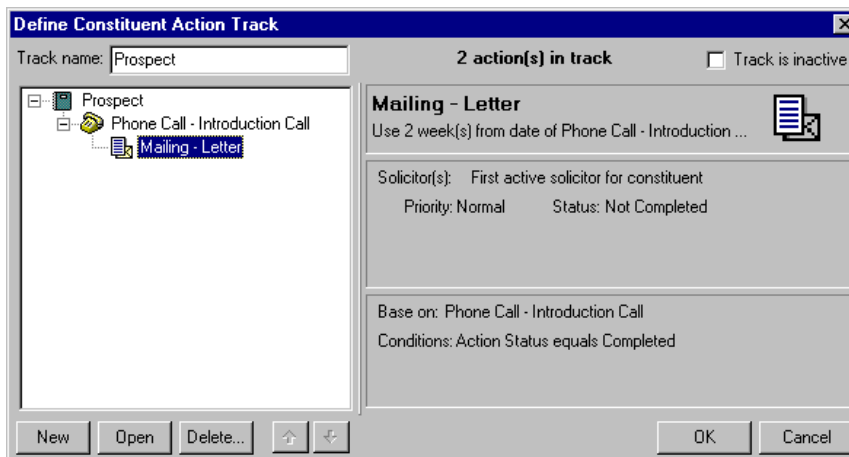
► **Deleting an action in an action track**

You can delete an action from a track at any time, as long as the track is not marked inactive. For more information about deleting an entire track, see “Deleting Action Tracks” on page 289.

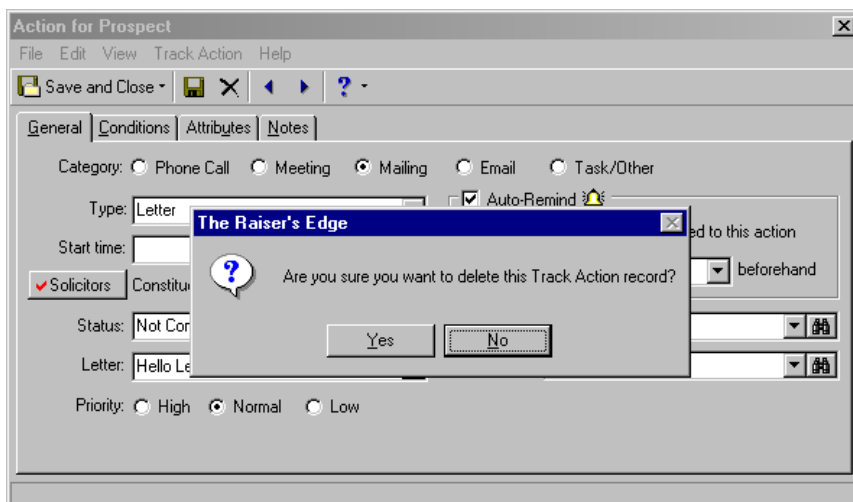
1. From the menu bar on the shell of *The Raiser’s Edge*, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



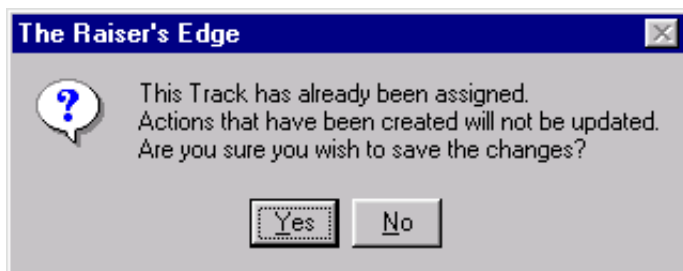
2. Select “Prospect” and click **Open**. The Define Constituent Action Track screen appears. For information about opening an action track, see “Opening an action track” on page 240.



3. Select “Mailing - Letter” and click **Delete**. The action opens and you receive a message, asking if you are sure you want to delete the track action record.



4. Click **Yes**. You return to the Define Constituent Action Track screen.
5. Click **OK**. If your track has already been assigned to a constituent or a group of constituents, a message appears asking if you are sure you wish to save the changes.



6. Click **Yes**. You return to the Action Tracks screen.
7. Click **Close**.

## Deleting Action Tracks

You created the action track and added related actions. What happens when the track is no longer needed? One option is to delete the action track from your database, and we show you how in this section. Deleting a track does not affect the associated actions as long as they have already been generated and assigned to a constituent, event, or appeal record. The action, however, no longer references the track. Deleting a track with associated dependent actions causes those actions to be deleted as well. Pay careful attention to all associated actions before deleting.

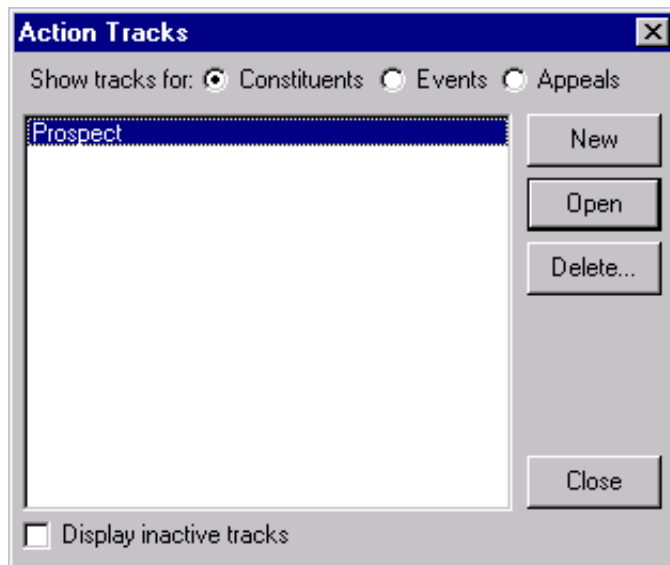
Another option we strongly recommend is to mark the **Track is inactive** checkbox on the Define Action Track screen. If you make a track inactive, it can be edited and deleted, when necessary. If a track is marked inactive while assigned, it remains inactive on the records to which it is assigned until the entire track is complete.

### ▶ Deleting an action track

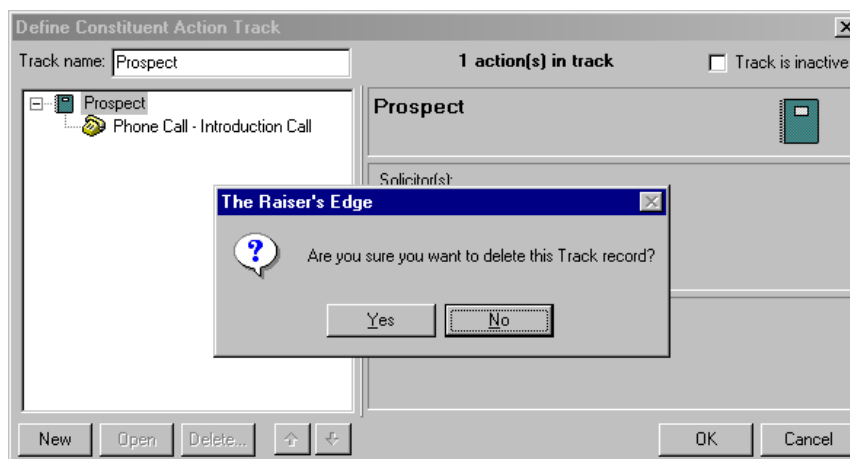
This procedure shows you how to delete an action track from your database. Instead of deleting the action track, however, we recommend you mark the action as inactive.

**Scenario:** The Prospect action track you assign to new prospect records has been eliminated from your prospect welcome agenda. Delete this action track from your database.

1. From *The Raiser's Edge* menu bar, select **Tools, Action Tracks, Define Action Tracks**. The Action Tracks screen appears.



2. Select Prospect on the Action Tracks screen and click **Delete**. The Define Constituent Action track screen opens and a message appears, asking if you are sure you want to delete the track record.



3. Click **Yes**. You return to the Action Tracks screen.
4. Click **Close**.

# Solicitors



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Requests for contributions are an essential part of fundraising, so your organization's solicitors are very important. A solicitor is a constituent who secures contributions from other constituents through personal contact such as telephone calls, dinners, or social visits. Not all constituents are solicitors for your organization. For example, constituents who are volunteers or committee members may not have the time or resources to also work as solicitors.

Your organization's board members, trustees, and executives are often the primary solicitors. These individuals have usually been involved with your organization for an extended period of time, so they know many of your constituents.

Because a constituent's position in your organization is often directly related to the amount of contributions secured, a board member probably brings in larger donations than a volunteer. Once you determine which constituents you should make solicitors, you can use *The Raiser's Edge* to streamline your solicitors' fundraising efforts.

You can assign solicitors to specific constituents for a certain length of time, designate goals for individual solicitors, and credit solicitors for gifts they secure. To better understand the concepts discussed in this chapter, we recommend you read the other chapters of this guide.

The Solicitors chapter takes you step-by-step through the process to create and manage solicitors in your database. "Frequently Used Terms" on page 293 defines important terms used throughout the Solicitors chapter. You can use this section as a quick reference guide for any unfamiliar terms you find while you read this chapter.

In "Understanding Solicitors" on page 295, we discuss the building blocks necessary to create a well-organized system to enter solicitor information. In "Work with Solicitors" on page 299, we explain how to enter, edit, view, and delete solicitor information in *The Raiser's Edge*.

## Frequently Used Terms

To effectively use solicitors for your organization's fundraising efforts, we recommend you have a basic understanding of common solicitor terms. These terms appear throughout the Solicitors chapter. If you find an unfamiliar term when you read this or any chapter in *The Raiser's Edge* documentation, search the online glossary in the help file.

**Appeal goal.** The appeal goal is the overall goal amount for each appeal. Because your campaigns can include several appeals, you can assign a goal for each appeal. The goal amounts of solicitors for each appeal contribute to the appeal goal. You can view the solicitor hierarchy for an appeal goal from the appeal record.

**Campaign goal.** The campaign goal is the overall goal amount for each campaign. You assign solicitors affiliated with the campaign to constituents for specific amounts. Reaching a campaign goal depends on the success of solicitors attaining their individual goal amounts for the campaign. You can view the solicitor hierarchy for a campaign goal from the campaign record.

**Captain.** The captain is the solicitor team member who coordinates the team's efforts, keeps team members informed, offers assistance or advice to the team, and encourages members to reach their goals. For example, Anne Sinclair has been a solicitor for your organization for the past five years. Because of her experience, you make Anne the captain of your Annual Fund team. As the team's representative, Anne works as the go-between for your organization and her team members. Because Anne needs to keep everyone informed, as well as to advise and encourage her team, you may not want to assign her a solicitor goal. Although captains can coordinate a team's efforts to improve the efficiency and effectiveness of the team, you are not required to have a captain for each team.

**Fund goal.** The fund goal is the overall goal for each fund. Because your campaigns may be composed of several funds, you can assign a goal for each fund. The goal amounts of solicitors for each fund contribute to the fund goal. Like the campaign goal, you can view the solicitor hierarchy for a fund goal from the fund record.

**Goal.** A goal is the amount of money you want a solicitor, a campaign, a fund, an appeal, or other category to bring into your organization. Large goals, such as a campaign goal, are usually broken down into smaller goals. For example, your Capital Campaign goal is \$1,000,000. This is the overall amount to reach by the end of the campaign. This campaign contains several funds and appeals, and each fund and appeal has an overall goal. For each fund and appeal goal, you have a solicitor hierarchy and each solicitor in the hierarchy has a goal. These solicitor goals contribute to each overall fund and appeal goals, and the fund and appeal goals contribute to the overall Capital Campaign goal.

**Hidden solicitor.** If a solicitor no longer works for your organization, you can hide solicitor information in your database. To hide solicitor information, unmark **This constituent - Is a solicitor**. If you unmark **This constituent - Is a solicitor**, the **Details** button is disabled and you can no longer view solicitor information from the constituent record. The **Solicitor Details** menu item also becomes disabled from the **View** menu.

The hidden information includes gift credit; action, constituent, and team captain assignments; and the solicitor's personal goals. Because you cannot access their solicitor information, these solicitors are not available for new assignments or goals, and they cannot receive credit for gifts contributed to your organization. You cannot include these solicitors in searches, queries, exports, reports, or summaries. When you mark **This constituent - Is a solicitor**, the **Details** button and **Solicitor Details** menu item become enabled so you can view solicitor goal and assignment information.

**Inactive solicitor.** To indicate that a solicitor is not currently available for new assignments, you can make the solicitor inactive. When you make a solicitor inactive, you save all the constituent's solicitor information in your database. You can always make an inactive solicitor active again. The program excludes inactive solicitors from solicitor searches, unless you select to include them, so you cannot accidentally create a new assignment for these solicitors. Because you can continue to query and report on solicitor information for inactive solicitors, we recommend you make a solicitor inactive rather than hide the solicitor information in your database.

**Solicitor.** A solicitor is a constituent in your database who seeks contributions to your organization from other constituents. Solicitors usually hold an office in your organization, such as board member, trustee, or executive. These individuals frequently have more contact with a greater number of constituents and are ideal candidates for solicitors. Not all constituents are solicitors for your organization.

**Solicitor assignment.** You can assign solicitors to constituents in your database, to actions you create for constituents, and actions associated with events or appeals. When you assign a solicitor to a constituent, you can determine the length of the assignment and the amount a solicitor asks a constituent to contribute. You can also decide whether the solicit amount is associated with a goal for a campaign, a fund, or an appeal. Constituent assignment information appears on both the solicitor's constituent record and the constituent record of the individual or organization to which the solicitor is assigned. When a constituent contributes a gift, you can determine the amount of credit a solicitor receives.

When you assign a solicitor to an action such as a phone call or dinner meeting, you make the solicitor responsible to complete the action. You can view action assignment information from the constituent record of the individual or organization that receives the action. If you use *Event Management*, you can also assign a solicitor to an action associated with an event. You can also assign a solicitor to an action associated with an appeal. For example, you want Kathleen Bentley to contact all participants in your spring tennis tournament. From the Actions tab of the Spring Tennis Tournament event record, you assign Kathleen to the action of calling the participants of the event. You can view information about the phone call Kathleen is assigned to make for the tournament from the Actions tab.

**Solicitor goal.** A solicitor goal is the amount of money a solicitor is responsible to raise for a particular campaign, fund, appeal, or other category goal. For example, the campaign goal for your Annual Campaign is \$500,000. You expect Joseph Diresta to obtain \$10,000 in contributions for this campaign. Therefore, Joseph's solicitor goal for the Annual Campaign is \$10,000. You can also assign solicitors to unspecified goals, which are goals not related to a specific campaign, fund, or appeal.

**Solicitor hierarchy.** The solicitor hierarchy is a tree view that displays how solicitors are organized for a goal for a campaign, a fund, or an appeal. In the hierarchy, solicitors can stand alone or report to other solicitors, themselves, or a solicitor team. Solicitor teams can report to other teams. The solicitor hierarchy visually presents the relationship solicitors have to one another. A solicitor may report to another solicitor because you want someone with little experience to report to a solicitor who has worked for your organization for a longer period of time.

Solicitors can also report to themselves. For example, you may want to create a fund goal for a solicitor who also contributes to the fund. You can enter a fund goal for the solicitor and indicate the solicitor reports to himself. When the solicitor contributes to the fund, he can also receive solicitor credit for the contribution. For solicitor teams, a solicitor must report to a specific team to be included in the team's solicitor hierarchy.

**Team.** Once you determine which constituents in your database to associate with a specific campaign, fund, or appeal, you can organize the solicitors into teams. A team is a group of solicitors who work toward a common goal. Each team member works to reach an individual goal that contributes to the overall team goal. Many organizations offer a reward to teams who reach or surpass their goals, which is an additional incentive for team members to encourage each other to attain their individual goals to meet the team's goal.

**Unspecified goal.** For goals that are not for a campaign, a fund, or an appeal, you can select an unspecified goal. If you have the proper user rights, you can create categories of unspecified goals. For example, your organization can have solicitors responsible to find prospects or attend organization functions. You may not expect these individuals to raise money. Rather, these solicitors may be concerned with making valuable contacts for your organization. You want to keep track of all solicitors and their activities. Therefore, you can create different categories of unspecified goals for solicitors who are not associated with a goal for a campaign, a fund, or an appeal.

## Understanding Solicitors

Once you determine which constituents in your database to make solicitors, you can use *The Raiser's Edge* to streamline your solicitors' fundraising efforts. The information you enter for each solicitor helps you organize all solicitors' efforts to raise money. You can assign solicitors to constituents and actions, organize your solicitors into specific categories with specific goals, and follow each solicitor's progress toward a goal.

You can select solicitors for each fundraising category in your organization and create solicitor teams for campaign, fund, and appeal goals. Once you add a solicitor to a goal, you can then assign the solicitor to constituents in your database to create an efficient system to secure contributions. Once you organize your solicitors, you can create a Solicitor Performance Summary or run one of the solicitor reports available under the **Analytical Reports** category of *Reports* to easily track their progress toward specific goals.

## What Is a Solicitor?

A solicitor is a constituent who requests contributions to your organization. In *The Raiser's Edge*, solicitors must be constituents, although not all your constituents are solicitors for your organization. Solicitors are usually assigned to constituents with whom they have a relationship. For example, a solicitor who is a close friend of a constituent will more successfully secure a gift than a solicitor who has never met the constituent. Solicitors appear as relationships on the constituent record of the individual or organization to which the solicitor is assigned.

You can associate solicitors with campaigns, funds, appeals, or any other goal categories your organization establishes. You can determine the goal amount that each solicitor for a particular goal type is responsible. You can then assign your solicitors to constituents and actions to provide an organized means for solicitors to achieve their goals.

Once a constituent who has assigned solicitors contributes a gift to your organization, you can determine which solicitors receive credit for the gift and how much credit each solicitor receives. Although most of your organization's solicitors work to secure contributions, you may create unspecified goals for certain solicitors, such as to make new contacts for your organization.

## What Is a Solicitor Assignment?

You can assign solicitors to constituents and actions you create for constituents. When you assign a solicitor to a constituent, you can determine the length of the assignment and the amount the solicitor asks a constituent to contribute. You can also decide whether the solicit amount is associated with a goal for a campaign, a fund, or an appeal.

If you use *Event Management*, you can also assign a solicitor to an action associated with an event from the event record. For example, you want David Murphy to contact all participants in your annual tennis tournament. From the Actions tab of the event record, you can assign David to the action of calling the participants. You can also assign a solicitor to an action associated with an appeal.

When you assign a solicitor to a constituent or an action, you determine the solicitor's responsibilities. Solicitor assignments also provide an easy way for you to see which solicitors receive credit for gifts contributed to your organization. Once you create goals and assignments for solicitors, you can create a Solicitor Performance Summary, a Solicitor Comparison Report, a Solicitor Goal Summary report, or a Solicitor Performance Analysis report to view the progress solicitors make toward their specific goals.

## What Is a Solicitor Goal?

A solicitor goal is the amount each solicitor is responsible to secure for a campaign, a fund, an appeal, or an unspecified goal. A solicitor usually has two different goals: an overall goal amount and a specific goal amount for each solicitor assignment.

The first goal is the amount the solicitor needs to secure for a campaign, a fund, an appeal, or an unspecified goal. To meet a goal for a campaign, a fund, or an appeal, you can assign the solicitor to constituents in your database. The second goal is the amount you enter when you assign a solicitor to a constituent. For example, for your organization's Annual Fund, you create a fund goal of \$5,000 for the solicitor Audrey Lorenz. To meet her fund goal, you assign Audrey to five constituents for \$1,000 each.

Audrey's constituent assignment total equals \$5,000. She now has a solicitor goal for the Annual Fund and five separate solicitor goals for the constituents she is assigned to for this fund. If each of these five constituents contributes \$1,000 or more, Audrey can meet or exceed her solicitor goal of \$5,000.

## What Is a Solicitor Team?

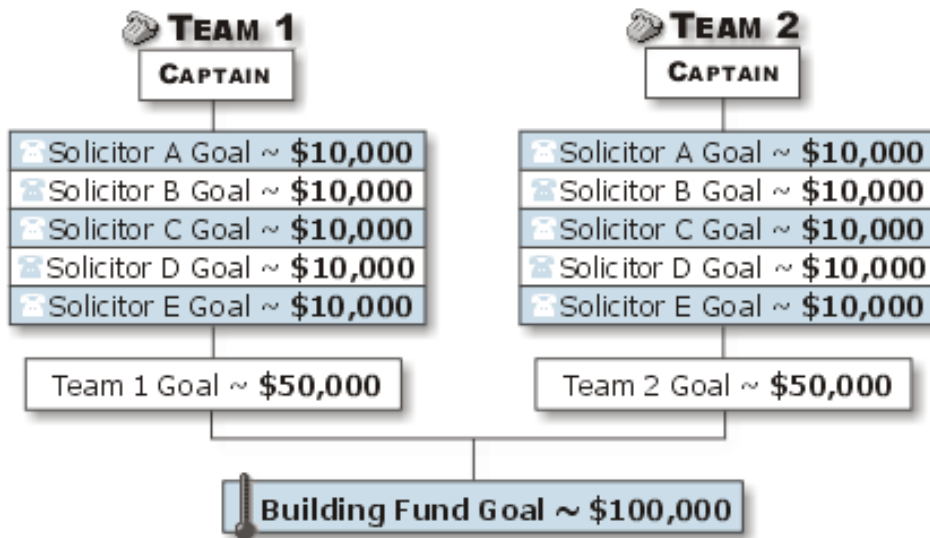
**Note:** The individual goals for each team member determine the team goal amount. When a team member's individual goal amount changes, the team goal amount increases or decreases accordingly. To make a team responsible for a specific overall amount, you must decide how to distribute the amount among the team members.

To further organize fundraising efforts for your organization's campaigns, funds, and appeals, you can set up solicitor teams. A solicitor team is a group of solicitors associated with a specific campaign, fund, or appeal goal. You can assign a captain for each solicitor team you create.

The captain serves as a primary contact for the team and organizes the team's efforts. The team captain may be devoted to organize, encourage, and direct the team and may not have a solicitor goal.

Members of a solicitor team have individual solicitor goals and the sum of these goals equals the team goal. Each team goal constitutes a portion of the overall campaign, fund, or appeal goal. For example, the overall fund goal of your organization's Building Fund is \$100,000. You want to assign twelve solicitors to this fund. You decide to create two teams, with each team responsible for \$50,000.

Both teams consist of five team members and one captain. Each member of the two teams is assigned an individual solicitor goal. You do not assign a solicitor goal to the team captains because you want the captains to coordinate their team's efforts. Added together, the individual team member goals equal the team goal of \$50,000. In this example, the team goals for both teams add up to the overall Building Fund goal amount of \$100,000.



**Note:** In the solicitor hierarchy, solicitors can report to themselves, other solicitors, or teams. Solicitor teams can only report to other teams.

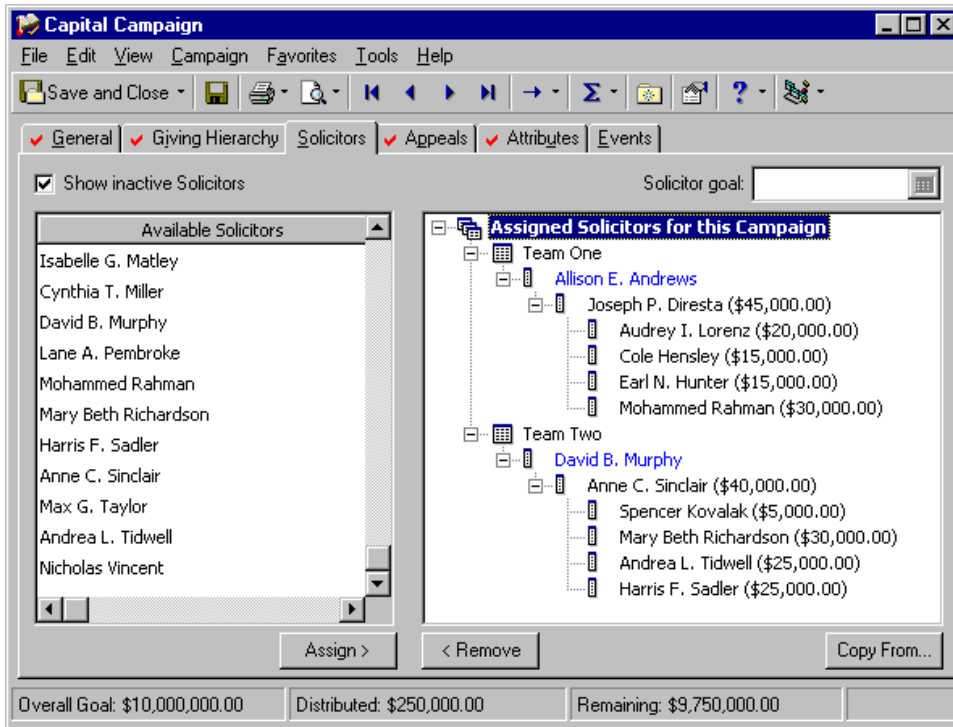
When you create a team for a goal for a campaign, a fund, or an appeal, the team appears in the solicitor hierarchy for that campaign, fund, or appeal. The solicitor hierarchy is a tree view that shows how solicitors are organized for the goal. To view the solicitor hierarchy, select the Solicitors tab of the campaign, fund, or appeal record.

At the highest level of the hierarchy are solicitors who do not report to teams or other solicitors, and teams that do not report to other teams. A plus sign appears to the left of these teams and solicitors. To view the teams or solicitors who report to the hierarchy entry, click the plus sign. Solicitors who have subentries in the solicitor tree view are responsible to advise and encourage solicitors who report to them.

The solicitor hierarchy works in much the same way as the management hierarchy of a business. Employees report to a manager; the manager reports to a higher official, perhaps a vice president; and the vice president reports to a president or board of directors. The purpose of the hierarchy is to make sure everyone works toward a common goal, in this case, to secure donations for your organization.

The following example explains the structure of solicitor teams. Your organization's Capital Campaign has two solicitor teams, Team One and Team Two. Each team has a goal of \$125,000. Each team member, with the exception of the team captain, is responsible for a portion of their team's goal.

The teams are further broken down by having several solicitors report to one solicitor. Team One consists of five members, not including the team captain. Four of the team's solicitors report to Joseph Diresta. Team Two is organized the same way, with four solicitors who report to Anne Sinclair. The team captains are not assigned a solicit amount. Just as the captain advises and encourages all team members, Joseph and Anne can provide additional support to the individuals who report to them.



## Solicitor Summary and Reports

In *The Raiser's Edge*, you can create a Solicitor Performance Summary to view information about gifts credited to your organization's solicitors. From the **View** menu of the Records page or the **View** menu of a solicitor's constituent record, select **Solicitor Performance Summary**.

The Solicitor Performance Summary provides a grid view of a constituent's solicitor activity. The summary results contain a goal panel and a thermometer graph that display the solicitor's progress toward a goal. The program saves the summary filters and settings for each user. When you create a new summary, the new filters and settings replace the old ones. You can select several graph views; including a bar, pie, line, or area graph of the summary results. For more information about how to create summaries, see the *Summaries Guide*.

From *Reports*, you can create additional reports for solicitors, such as the Solicitor Comparison Report, Solicitor Goal Summary, and Solicitor Performance Analysis report. You can also create an output query for each of these reports. An output query groups the records included in your report so you can use these records in other program functions in *The Raiser's Edge*. For example, you can use the output query generated by the Solicitor Performance Analysis report to create labels in *Mail*, then send your solicitors a copy of the report to keep them informed of their progress. For information about mailings, see the *Mail Guide*.

In addition to solicitor reports, you can create a Tickler Report to provide a list of upcoming actions your solicitors are scheduled to perform, such as phone calls or lunch meetings. The Action Detail report lists actions performed in the past. For example, this report indicates a constituent has only received phone calls from the assigned solicitor, so you decide a dinner meeting can lead to a larger contribution. For more information about specific reports, see the *Reports Guide*.

# Work with Solicitors

In *The Raiser's Edge*, you can make a constituent a solicitor from the Bio 1 or Org 1 tab of the constituent record. For information about how to make a constituent a solicitor, see "Solicitors: The Basics" on page 299. From the Relationships tab of an individual or organization constituent record, you can assign a solicitor to the constituent. You can also assign a solicitor to a constituent from the solicitor's constituent record. For information about how to assign a solicitor to a constituent, see "Solicitor Assignments" on page 311.

From a campaign record, a fund record, or an appeal record, you can add solicitors to a goal for the campaign, fund, or appeal. You can also create teams of solicitors from the campaign, fund, or appeal record. For information about how to add a solicitor to a goal for a campaign, a fund, or an appeal, see "Solicitor Goals" on page 329. For information about how to establish solicitor teams for a campaign, a fund, or an appeal, see "Solicitor Teams" on page 343.

From a solicitor's constituent record, you can view assignment and goal information for the solicitor. For information about how to view solicitor assignments or goal information, see "Solicitor Assignments" on page 311 or "Solicitor Goals" on page 329. You can also create, edit, and delete solicitor goals and assignments, if you have the proper security rights. For information about how to establish user rights, see the *Configuration & Security Guide*.

When your organization receives a gift as the result of a solicitor's efforts, you can credit all or a portion of the gift amount to the solicitor from the gift record. For information about how to credit a solicitor for a gift, see the *Gift Records Guide*.

From the action record, you can assign solicitors to a specific action. For example, you can create an action such as a lunch meeting and assign a solicitor to the action. The assigned solicitor is then responsible to carry out the action. If you use *Event Management*, you can also assign a solicitor to an action associated with an event from the Actions tab of the event record. To learn more about how to assign a solicitor to an action, see "Understanding Action Records" on page 244.

If you use *Prospect Research Management*, you can credit solicitors for proposals. From the Prospect tab of the constituent record, you can specify which solicitors receive credit for the proposal. For information about how to credit solicitors for a proposal, see the *Prospect Data Entry Guide*.

If you use *Membership Management*, you can credit a solicitor for a membership from the membership record. Similar to when you credit a solicitor for a gift, when a constituent pays membership dues and a solicitor receives credit for the membership, you can determine how much credit the solicitor receives. For information about how to credit solicitors for memberships, see the *Membership Data Entry Guide*.

If you use *Event Management*, you can credit a solicitor for gifts linked to an event. When you plan an event for your organization, on each participant record, you can also enter the names of the solicitor who encouraged a registrant, guest, or sponsor to participate in the event. For information about gifts linked to an event, see the *Event Gifts Guide*. For more information about event and participant records, see the *Event Management Data Entry Guide*.

## Solicitors: The Basics

In *The Raiser's Edge*, you can make constituents in your database solicitors, hide solicitor information for those who are no longer available, and make solicitors who are unavailable for a certain period of time inactive.

To make a constituent a solicitor, mark **This constituent - Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record. Once you make a constituent a solicitor, the solicitor information you enter is always available in the program unless you delete the constituent record.

If you unmark **This constituent - Is a solicitor** on the Bio 1 or Org 1 tab of the constituent record, the solicitor information remains in your database. However, you cannot access this information unless you flag the constituent as a solicitor again. The program then hides solicitor information that appears on records from view and excludes this information from queries, reports, and summaries.



If a solicitor is currently unable to work for your organization but plans to resume his duties at a future date, you can mark **This solicitor is inactive** on the solicitor information screen to make the solicitor inactive. The program excludes inactive solicitors from solicitor searches by default, but you can manually select to include them. You can also create queries, reports, and summaries that include inactive solicitors. If you no longer want a solicitor to be available for assignments, we recommend you make the solicitor inactive so you can still access his information.

## Make a Constituent a Solicitor

**Tip:** You can use shortcut keys to move around *The Raiser’s Edge* without your mouse. For example, press **CTRL + S** on your keyboard to save a record or **CTRL + O** to open a record.

From the Bio 1 or Org 1 tab of a constituent record, you can mark **This constituent - Is a solicitor** to make the constituent a solicitor.

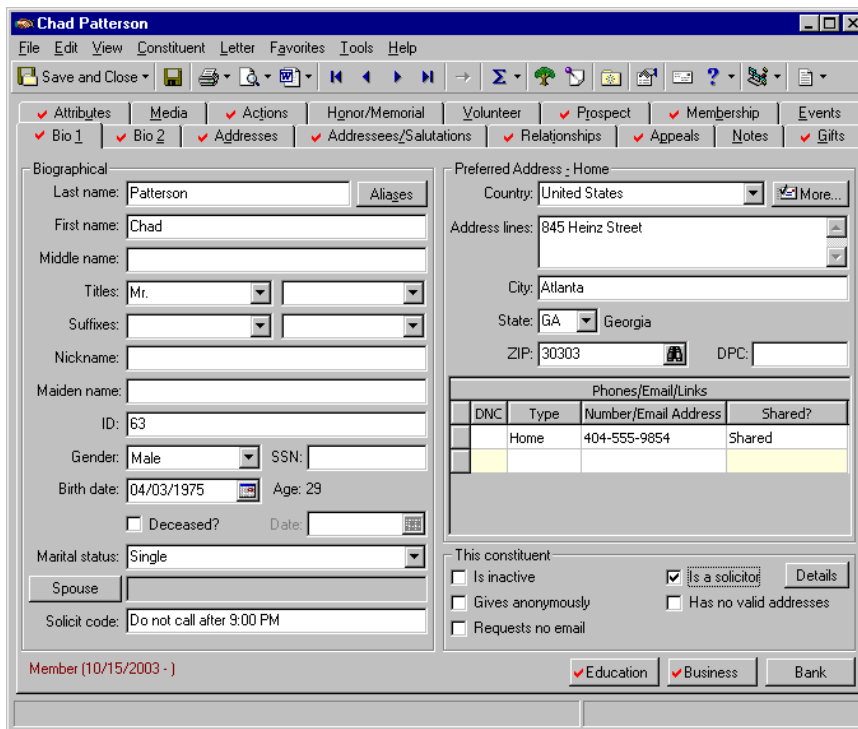
### ▶ Make a constituent a solicitor from the constituent record

You can make both individuals and organizations that are constituents in your database solicitors.

**Scenario:** Chad Patterson is a long-time supporter of your organization. Chad calls to tell you he knows many other constituents and wants to help raise funds. Update Chad’s constituent record and make him a solicitor.

**Note:** For organization constituents, the **This constituent - Is a solicitor** checkbox is located on the Org 1 tab of the constituent record.

1. From Chad Patterson’s constituent record, select the Bio 1 tab. For more information about how to open records, see “Access Constituent Records” on page 4.



2. Under **This Constituent**, mark **Is a solicitor**.

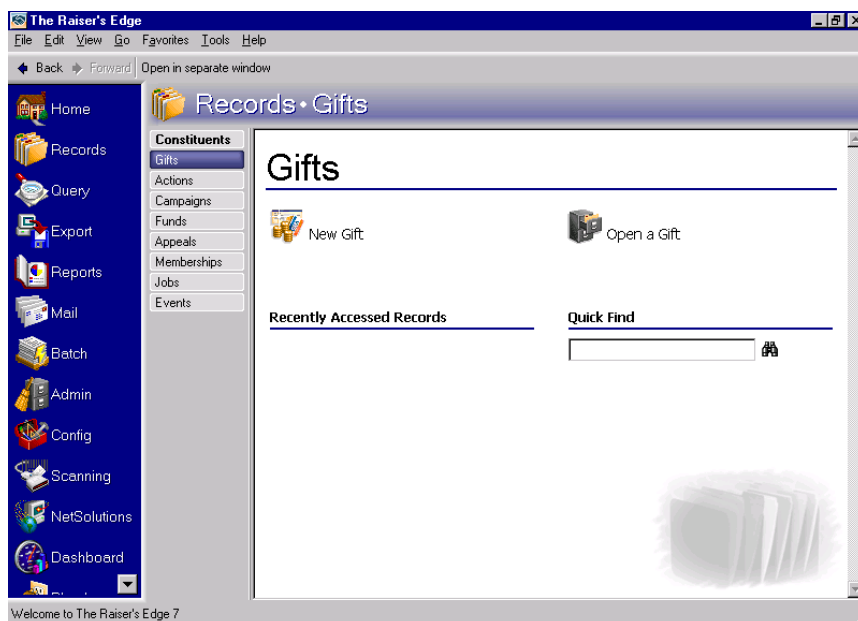
3. On the toolbar, click **Save and Close**. Chad Patterson is now a solicitor in your database.

► **Make a constituent a solicitor from the Open screen**

On the Open screen, you can search for constituents in your database who are not solicitors and make these constituents solicitors directly from the Open screen. You can make a constituent a solicitor from any record in the program to which you can add a solicitor. To access the Open screen for constituents, in the **Solicitors** field, click the binoculars.

**Scenario:** Michelle Wagner recently received a volunteer award from your organization. In response to Michelle's recognition, her employer, City Insurance Company, contributes \$5,000 to your Building Fund. Michelle is not a solicitor for your organization, but you want to credit her for the gift. Make Michelle a solicitor from the gift record.

1. On the Raiser's Edge bar, click **Records**. The Records page appears.
2. Click **Gifts**. The Gifts page appears.



3. Click **New Gift**. The New Gift screen appears.

**Note:** If the message “The constituent has at least one outstanding pledge. Would you like to apply this gift to a pledge?” appears, click **No**.

4. Enter the gift information for City Insurance Company, as shown in the picture below. For information about how to enter a new gift, see the Gift Record chapter of the *Gift Records Guide*.

5. After you enter the gift information, click **Solitors**. The Solitors Credited for this Gift screen appears.

**Note:** In the **Solicitor** column, the drop-down arrow appears so, if on a gift record, you add a solicitor that already exists, you can select from a list of solicitors assigned to the particular constituent.

6. Click in the **Solicitor** column. The binoculars and a drop-down arrow appear.

**Note:** We recommend you use only one or two of the most useful criteria fields to search for a record. Because the search results must meet all criteria you enter, too much information may actually prevent you from locating the record.

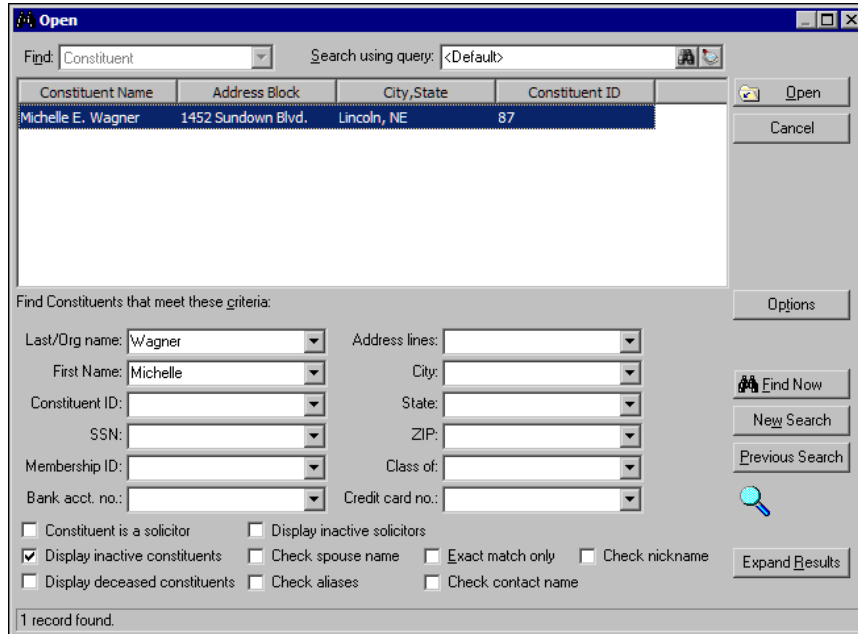
7. Click the binoculars. The Open screen appears.

**Note:** If you do not know the correct spelling or number, you can enter the first few letters or characters in the **Find Constituents that meet these criteria** fields. For more information about how to use these fields, see the *Program Basics Guide*.

8. Unmark **Constituent is a solicitor**.
9. In the **Last/Org name** field, enter “Wagner”.
10. In the **First name** field, enter “Michelle”.

**Note:** Make sure **Constituent is a solicitor** is unmarked on the Open screen. Otherwise, you cannot find Michelle Wagner, who is not yet a solicitor in your database.

- Click **Find Now**. Michelle's name appears in the constituent grid.



Find: Constituent Search using query: <Default>

Constituent Name	Address Block	City, State	Constituent ID
Michelle E. Wagner	1452 Sundown Blvd.	Lincoln, NE	87

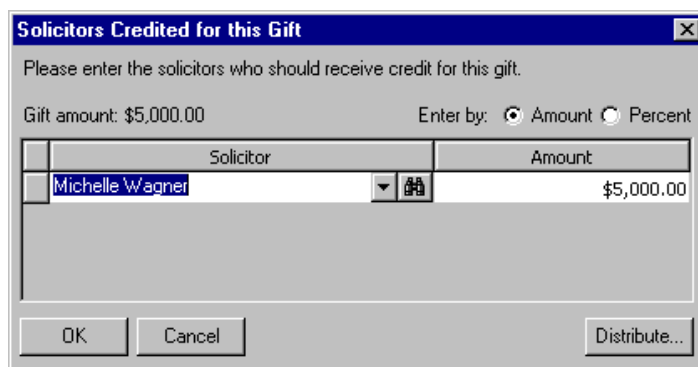
Find Constituents that meet these criteria:

Last/Orig name: Wagner Address lines:   
 First Name: Michelle City:   
 Constituent ID: State:   
 SSN: ZIP:   
 Membership ID: Class of:   
 Bank acct. no.: Credit card no:

Constituent is a solicitor  Display inactive solicitors   
 Display inactive constituents  Check spouse name  Exact match only  Check nickname   
 Display deceased constituents  Check aliases  Check contact name

1 record found.

- Select the name and click **Open**. A message appears to inform you that the constituent is not a solicitor and to ask whether to make the constituent a solicitor.
- To make Michelle a solicitor for your organization, click **Yes**. Michelle's name appears in the **Solicitor** column of the Solicitors Credited for this Gift screen. The \$5,000 amount defaults into the **Amount** column.



Solicitors Credited for this Gift

Please enter the solicitors who should receive credit for this gift.

Gift amount: \$5,000.00 Enter by:  Amount  Percent

Solicitor	Amount
Michelle Wagner	\$5,000.00

OK Cancel Distribute...

**Note:** A red check mark on the **Solicitors** button indicates the record contains solicitor information.

14. Click **OK**. You return to the gift record. Michelle's name appears in the **Solicitors** field.

15. On the toolbar, click **Save and Close**.

A message may appear to inform you that this solicitor does not exist as an assigned solicitor on the constituent's record and to ask whether to add the solicitor as an assigned solicitor.

16. Click **No**. You do not want to create a solicitor assignment for Michelle at this time. You can determine Michelle's responsibilities as a solicitor later. For information about solicitor assignments, see "What Is a Solicitor Assignment?" on page 296. Michelle is now a solicitor in your database and she receives solicitor credit for City Insurance Company's gift.

## View Solicitor Details

Once you make a constituent a solicitor, you can view solicitor goal and assignment information for the solicitor from the Solicitor Information screen.

From the Goals tab of the Solicitor Information screen, you can view solicitor goals. To view goals by campaign, fund, appeal, category, or type, you can apply filters to the information in the Goals grid. The Goals grid shows the type of goal; the goal amount; the campaign, fund, appeal, or other category for which the goal was created; if the solicitor reports to another solicitor; and the name of the solicitor to whom he reports. To print the information in the Goals grid or export the information to another application, use the right-click menu.

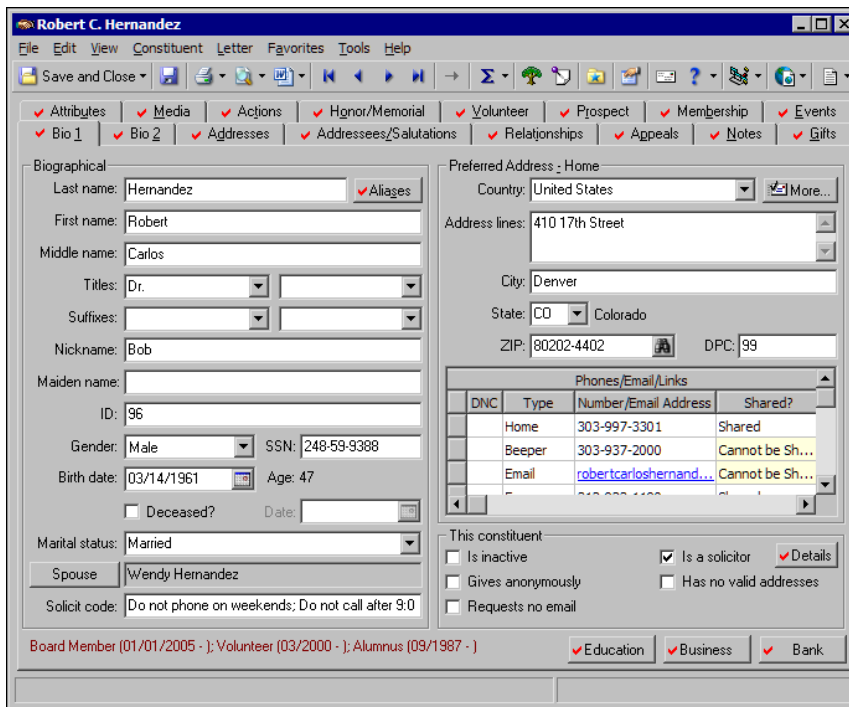
From the Assignments tab, you can view the solicitor's constituent assignments. The Assignments grid lists the constituents to whom the solicitor is assigned, the solicitor type for each assignment, the amount the solicitor is responsible to secure, and the start and end dates of the assignment. You can view Gift Details for each gift assigned to the solicitor for the selected constituent assignment. To print the information in the Assignments grid or export the information to another application, use the right-click menu.

### ► View solicitor details from the solicitor's constituent record

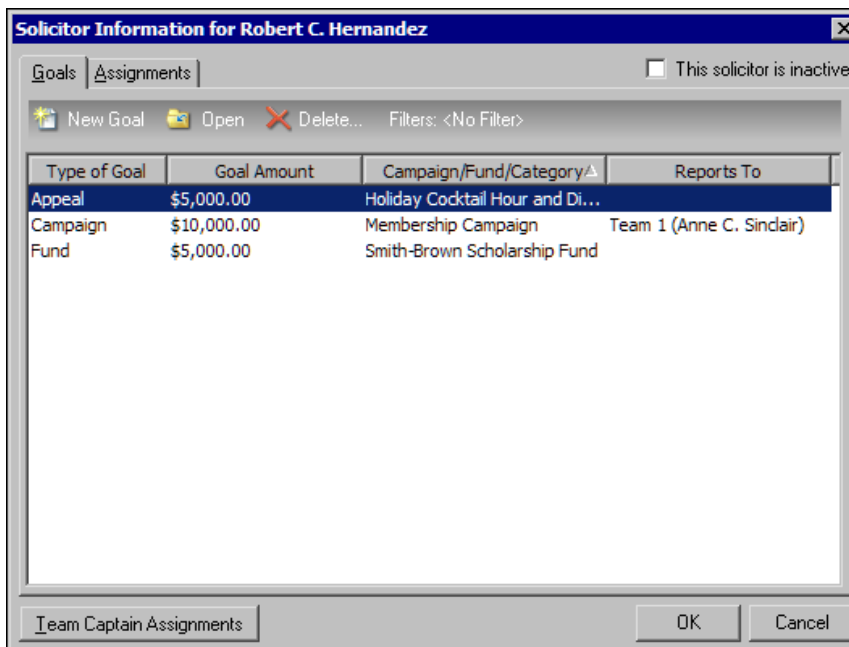
To view information about solicitor goals and assignments, click **Details** on the Bio 1 or Org 1 tab of the solicitor's constituent record. To view the same information, you can also select **View, Solicitor Details** from the menu bar of the solicitor's constituent record.

Note: You can maximize and resize your constituent records.

1. From a solicitor’s constituent record, select the Bio 1 or Org 1 tab. For information about how to open records, see “Access Constituent Records” on page 4.



2. Click **Details** beside the **Is a constituent** checkbox, or select **View, Solicitor Details** from the menu bar. The Solicitor Information screen appears.



3. To view solicitor information about the constituent, select the Goals tab or the Assignments tab.
4. When you finish viewing solicitor information, click **OK**. You return to the Bio 1 or Org 1 tab of the constituent record.
5. On the toolbar, click **Save and Close**.

## Hide Solicitor Information in Your Database

To hide solicitor information, unmark **This constituent - Is a solicitor**. If you unmark this checkbox, the **Details** button is disabled and you can no longer view solicitor information from the constituent record. The **Solicitor Details** menu item also becomes disabled from the **View** menu.

The hidden information includes gift credit; action, constituent, and team captain assignments; and the solicitor's personal goals. Because you cannot access their solicitor information, these solicitors are not available for new assignments or goals, and they cannot receive credit for gifts contributed to your organization. You cannot include these solicitors in searches, queries, exports, reports, or summaries. When you mark **This constituent - Is a solicitor**, the **Details** button and the **Solicitor Details** menu item become enabled, and you can view solicitor goal and assignment information.

### ► Hide solicitor information from the solicitor's constituent record

When you hide solicitor information, it remains in your database, but the **Details** button is disabled and you can no longer view solicitor information from the constituent record. The **Solicitor Details** menu item also becomes disabled from the **View** menu. You cannot view solicitor information until you mark **This constituent - Is a solicitor**.

**Scenario:** Isabelle Matley has been a solicitor for your organization for almost twenty years. For the past five years, Isabelle has been heavily involved with other projects and has not been able to work as a solicitor. Because Isabelle has had very few solicitor assignments in the past five years, hide her solicitor information.

1. From Isabelle Matley's constituent record, select the Bio 1 tab. For more information about opening records, see "Access Constituent Records" on page 4.

The screenshot shows a software window titled "Isabelle G. Matley" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1 (selected), Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The main area is divided into several sections:

- Biographical:** Last name: Matley (with an Aliases checkbox), First name: Isabelle, Middle name: Gray, Titles: Mrs., Suffixes, Nickname: Izzy, Maiden name: Salvona, ID: 52, Gender: Female, SSN: 222-33-4446, Birth date: 05/14/1952, Age: 55, Deceased? checkbox, Marital status dropdown, Spouse button, Solicit code.
- Preferred Address - Home:** Country: United States, Address lines: 847 Candler Road, City: Charleston, State: SC (South Carolina), ZIP: 29405, DPC.
- Phones/Email/Links:** A table with columns: DNC, Type, Number/Email Address, Shared?.
 

DNC	Type	Number/Email Address	Shared?
	Home	843-555-4878	Not Shared
	Email	igm@homeweb.com	Cannot be Sh...
- This constituent:**
  - Is inactive
  - Gives anonymously
  - Requests no email
  - Is a solicitor
  - Has no valid addresses
  - Details (button)

At the bottom, there are buttons for Education, Business, and Bank, and a footer note: "Development Staff (10/11/2004 -)".

**Warning:** Before you unmark **This Constituent - Is a solicitor**, we recommend you print a copy of the solicitor information.

2. Under **This Constituent**, unmark **Is a solicitor**. The program disables the **Details** button and hides Isabelle's solicitor information. On the **View** menu, the **Solicitor Details** menu item is also disabled.



3. On the toolbar, click **Save and Close**.

## Make a Solicitor Inactive

If a constituent can no longer work as a solicitor for your organization, we recommend you make the solicitor inactive rather than hide the solicitor information in your database. When you make a solicitor inactive, you indicate the constituent is a solicitor who is no longer available for assignments or goals. The solicitor information remains in your database, but the constituent is not available for new solicitor assignments. You can query, report, or create summaries that include an inactive solicitor's information. However, the program excludes inactive solicitors from searches by default, so you cannot accidentally create a new assignment or goal for an inactive solicitor.

If the solicitor you want to make inactive has assignments pending, you can adjust the assignment dates. Once you assign a solicitor to a constituent, you enter a start and end date to determine how long the assignment lasts. Until the assignment expires, the solicitor is responsible to contact the constituent and encourage the constituent to contribute to your organization. When you mark **This solicitor is inactive**, the program searches the solicitor information for open assignments. If the solicitor has an assignment that has not expired, you can either close the assignment or change the assignment's end date before you make the solicitor inactive. If you update the solicitor assignment, you can select the date the assignment expires.

► **Make a solicitor inactive and update assignments**

When you make a solicitor inactive, you indicate the solicitor is no longer available for assignments or goals. If a solicitor has assignments that have not yet expired, you can either close each assignment or change the assignment end dates while you make the solicitor inactive.

**Scenario:** David Murphy, a solicitor for your organization, plans to spend six months traveling. He asks to take time off from his work as a solicitor. Because David's leave is temporary, you want to be able to access his solicitor information, but do not want him to be available for new assignments while on leave. Make David an inactive solicitor in your database. David has constituent assignments that have not expired. Change the assignment end dates (**Date to**) to close the assignments while you make him an inactive solicitor.

1. From David Murphy's constituent record, select the Bio 1 tab. For information about how to open records, see "Access Constituent Records" on page 4.

David B. Murphy

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Hgnor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

Biographical

Last name: Murphy Aliases

First name: David

Middle name: Benson

Titles: Mr.

Suffixes:

Nickname:

Maiden name:

ID: 51

Gender: Male SSN:

Birth date: 09/11/1953 Age: 54

Deceased? Date:

Marital status: Married

Spouse: Margaret L. Murphy

Solicit code:

Preferred Address - Home

Country: United States More...

Address lines: 3596 Friendship Way

City: Cambridge

State: MA Massachusetts

ZIP: 02141 DPC:

DNC	Type	Number/Email Address	Shared?
	Home	617-499-8814	Shared

This constituent

Is inactive

Is a solicitor Details

Gives anonymously

Has no valid addresses

Requests no email

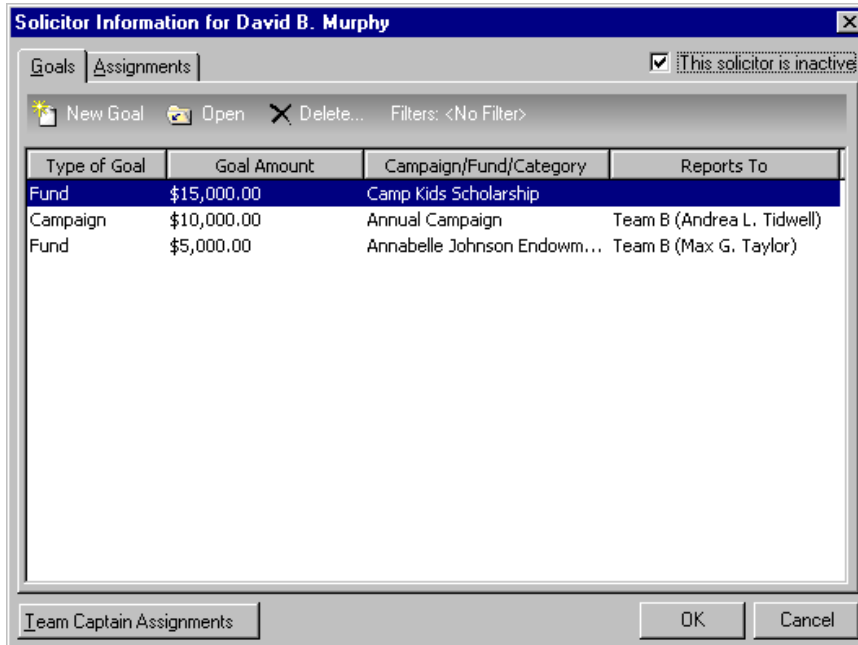
Trustee (04/03/2004 - )

Education Business Bank

2. Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

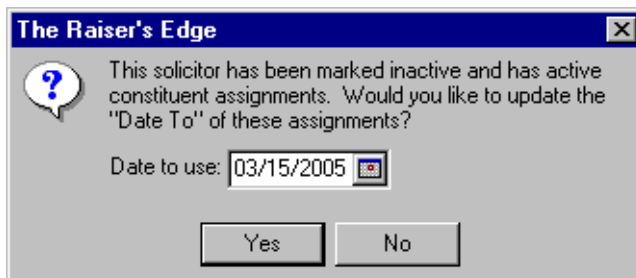
**Note:** You can include inactive solicitors in queries, summaries, exports, and reports.

3. Select the Goals tab.



4. Mark **This solicitor is inactive**. You can still view David's solicitor information, but he no longer appears as a current solicitor in your database.
5. Click **OK**. You return to the Bio 1 tab.
6. On the toolbar, click **Save and Close**.

Because David has current constituent assignments, a message appears to inform you that the solicitor has active assignments and to ask whether to update the **Date to** field (end date) for these assignments. On the message, the current date defaults into the **Date to use** field.



**Note:** Occasionally, you may want to leave an assignment open or select a date other than the current date to appear in the **Date to use** field. If a solicitor is temporarily inactive, you can change date in the **Date to use** field to the date you expect the solicitor to return.

7. In the **Date to use** field, enter today's date as the end date to appear in the **Date to** field on the current solicitor assignments.
8. Click **Yes**. The constituent record closes and the constituent assignments update.

## Solicitor Assignments

Once you enter campaign, fund, appeal, or unspecified goals, you can create assignments to help your organization's solicitors achieve these goals. You can assign solicitors to constituents and actions. When you assign a solicitor to a constituent, you determine the length of the assignment and the amount the solicitor is responsible to secure. You can create the assignment from the constituent record of the individual or organization to which a solicitor is assigned or from the solicitor's constituent record.

**Note:** Security is established in *Administration*. For more information about user rights, see the Security chapter of the *Configuration & Security Guide*.

On the Relationships tab of an individual or organization constituent record, you can assign a new solicitor to the constituent. Select **Assigned Solicitors** from the tree view on the left and click **New Assigned Solicitor**. Once you create solicitor assignments, you can view solicitors assigned to the constituent and edit and delete solicitor assignments, if you have proper security rights. The solicitor assignment information you enter on the Relationships tab also appears on the Bio 1 or Org 1 tab of the solicitor's constituent record. To view this assignment information from a solicitor's constituent record, click **Details** on the Bio 1 or Org 1 tab of the solicitor's constituent record. The Solicitor Information screen appears. Select the Assignments tab.

From the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the Bio 1 or Org 1 tab of the solicitor's constituent record, you can also assign the solicitor to a constituent. On the action bar, click **New Assignment**. Once you create solicitor assignments, on the Assignments tab, you can edit and delete solicitor assignments, if you have proper security rights.

You can assign solicitors to constituent, event, or appeal actions from the General tab of the action record. Click **Solicitors**. The Solicitors Assigned to this Action screen appears. Once you assign a solicitor to an action, the solicitor is responsible to make sure the action is carried out. For example, you create an action record for an email going to the constituent Samantha Hart. You assign a solicitor, Angela Diresta, to this action, so Angela sends the email to Samantha. Assigning solicitors to actions is discussed in "Actions" on page 229.

## Create a Solicitor Assignment

**Note:** You can add table entries to appear in the **Solicitor type** field. For information about adding entries to the **Solicitor type** table, see the *Configuration & Security Guide*.

You can assign a solicitor to an individual or organization constituent in your database to seek contributions to your organization. When you assign a solicitor to a constituent, you can enter specific assignment information, such as the length of the assignment and the solicit amount.

To further define the solicitor assignment, you can enter a solicitor type and associate the assignment with a specific campaign, fund, or appeal. For example, you assign the solicitor Andrea Tidwell to Melissa Elzy. Andrea's assignment is to ask Melissa to contribute to your organization's Capital Campaign. You select "Campaign" in the **Solicitor type** field to show that Andrea seeks campaign contributions for this assignment. You select "Capital Campaign" in the **Campaign** field to define the campaign for which Andrea seeks contributions. You can enter this information to define a solicitor's constituent assignment.

**Note:** Solicitors must be constituents. If you assign a solicitor to an individual or organization, the individual or organization must also be a constituent in your database.

Once you assign a solicitor to an individual or organization, you can view, edit, and delete the assignment from the Relationships tab of the individual or organization's constituent record, if you have proper security rights. You can also view, edit, and delete the assignment information from the solicitor's constituent record. When you change an assignment in one place, it automatically changes in the other.

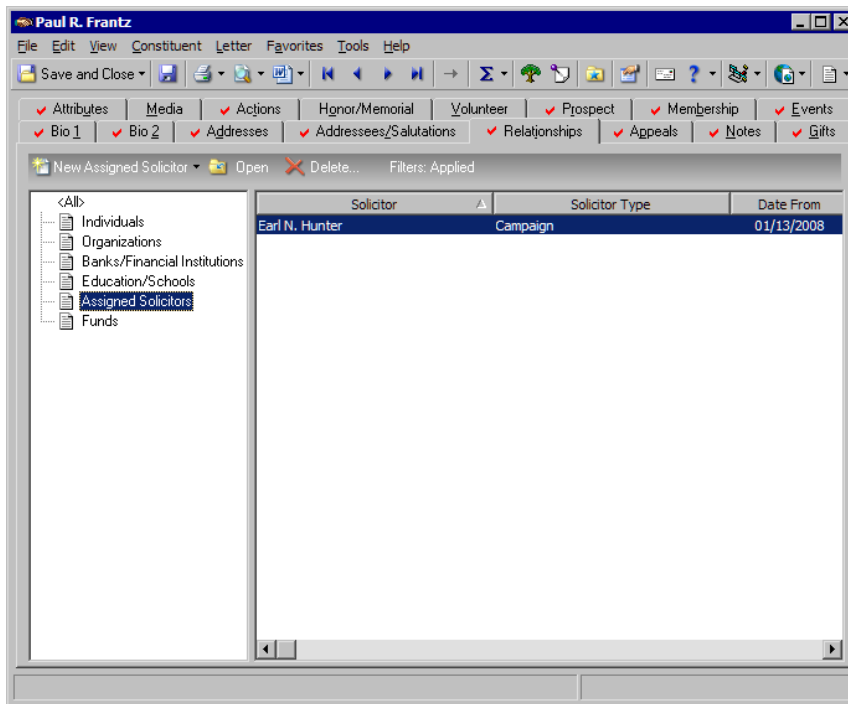
► **Assign a solicitor to a constituent from the Relationships tab**

**Note:** From the Color tab of User Options, you can select a color in which assigned solicitors appear on the Relationships tab. For information about how to select a color, see the *Program Basics Guide*.

You can assign a solicitor to a constituent from the Relationships tab of the individual or organization's constituent record.

**Scenario:** The constituents Mohammed Rahman and Paul Frantz are close friends. Mohammed is a solicitor for your organization. Because of their friendship, assign Mohammed to Paul for one year, with a solicit amount of \$1,000. The money received goes to the Natural Disaster Relief Fund of your Disaster Relief Campaign.

1. From Paul Frantz's constituent record, select the Relationships tab. For information about how to open records, see "Access Constituent Records" on page 4.
2. From the tree view on the left, select **Assigned Solicitors**.



**Tip:** On the toolbar, you can click the left and right arrows to move forward and backward through a list of solicitors to whom the constituent is assigned. You can also select **Assignment**, **Previous Assigned Solicitor** or **Next Assigned Solicitor** from the menu bar.

- On the toolbar, click **New Assigned Solicitor**. The New Assigned Solicitor screen appears.

**Note:** From the Records tab of User Options, you can select how a constituent name appears on the constituent record title bar.

- In the **Solicitor** field, click the binoculars and search your database for “Mohammed Rahman”. When found and selected, the constituent name appears in the **Solicitor** field.
- In the **Solicitor type** field, select “Campaign”. Mohammed works on your large campaigns, like the Disaster Relief Campaign.
- In the **Date from** field, enter the date 01/01/2009; in the **Date to** field, enter the date 01/01/2010.

**Tip:** In the **Amount** field, you do not need to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

- In the **Amount** field, enter the amount \$1,000. This is the amount you want Mohammed to encourage Paul to donate to you organization within this time period.
- In the **Campaign** field, select “Disaster Relief Campaign”. Paul’s future donation goes to this campaign.
- In the **Fund** field, select “Natural Disaster Relief Fund”. Paul’s future donation will be allocated to this fund.

Leave the **Appeal** field blank. After your organization receives a donation from Paul, you can update the solicitor assignment with the appeal Mohammed used to secure the donation. For information about how to update an assignment, see “Edit a Solicitor Assignment” on page 321.

- In the **Notes** box, enter “Mohammed Rahman and Paul Frantz are close friends. Mohammed is sure to secure the donation.”

**Note:** The solicitor assignment also appears on the Mohammed’s constituent record. It appears on the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the Bio 1 tab.

- On the toolbar, click **Save and Close**. You return to the Relationships tab of Paul’s constituent record. The new solicitor assignment appears in the grid.
- On the toolbar, click **Save and Close**.

► **Assign a solicitor to a constituent from the solicitor's constituent record**

You can assign a solicitor to a constituent from the Assignments tab of the Solicitor Information screen. This screen is conveniently accessed from the **Details** button on the Bio 1 or Org 1 tab of the solicitor's constituent record.

**Scenario:** The constituents David Murphy and Joseph Bernstein are cousins. David is a solicitor for your organization. Because of their familial relationship, assign David to Joseph for one year, with a solicit amount of \$2,000. The money received goes to the Smith-Brown Scholarship Fund of your Scholarship Campaign.

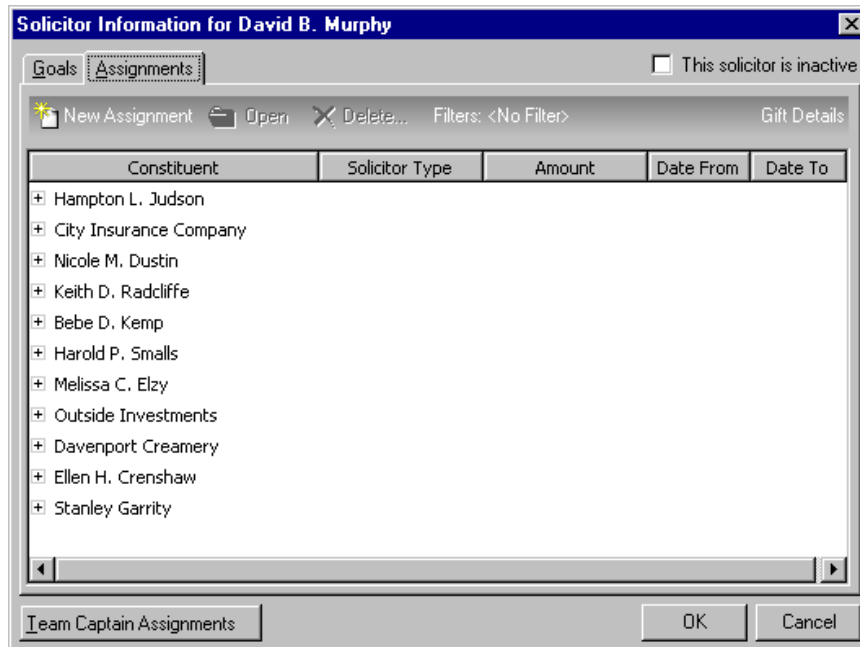
1. From David Murphy's constituent record, select the Bio 1 tab.

The screenshot shows a web-based constituent record for David B. Murphy. The 'Bio 1' tab is active. The form includes the following fields and sections:

- Biographical:** Last name: Murphy, First name: David, Middle name: Benson, Titles: Mr., Gender: Male, Birth date: 09/11/1953, Age: 54, Marital status: Married, Spouse: Margaret L. Murphy.
- Preferred Address - Home:** Country: United States, Address lines: 3596 Friendship Way, City: Cambridge, State: MA, ZIP: 02141.
- Phones/Email/Links:** A table with columns: DNC, Type, Number/Email Address, Shared?. One entry is visible: Home, 617-499-8814, Shared.
- This constituent:**
  - Is inactive
  - Is a solicitor
  - Details
  - Gives anonymously
  - Has no valid addresses
  - Requests no email
- Trustee (04/03/2004 - )** with buttons for Education, Business, and Bank.

2. Click **Details** beside **Is a solicitor**. The Solicitor Information screen appears.

3. Select the Assignments tab.



4. On the action bar, click **New Assignment**. The New Solicitor Assignment screen appears.

5. In the **Constituent** field, click the binoculars and search your database for “Joseph Bernstein”. When found and selected, the constituent name appears in the **Constituent** field.
6. In the **Solicitor type** field, select “Campaign”. David works on your large campaigns, like the Scholarship Campaign.
7. In the **Date from** field, enter the date 01/01/2009; in the **Date to** field, enter the date 01/01/2010.

**Tip:** In the **Amount** field, it is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

8. In the **Amount** field, enter the amount \$2,000. This is the amount you want David to encourage Joseph to donate to your organization within this time period.



9. In the **Campaign** field, select “Scholarship Campaign”. Joseph’s future donation goes to this campaign.
10. In the **Fund** field, select “Smith-Brown Scholarship Fund”. Joseph’s future donation will be allocated to this fund.

Leave the **Appeal** field blank. After your organization receives a donation from Joseph, you can update the solicitor assignment with the appeal David used to secure the donation. For information about how to update an assignment, see “Edit a Solicitor Assignment” on page 321.

11. In the **Notes** box, enter “David Murphy and Joseph Bernstein are first cousins. David is sure to secure the donation.”

**Note:** The solicitor assignment also appears on the Relationships tab of Joseph’s constituent record. On Joseph’s constituent record, select the Relationships tab. Select **Assigned Solicitors** from the tree view on the left. The assignment appears in the grid on the right.

12. On the toolbar, click **Save and Close**. You return to the Assignments tab. In the grid, the new solicitor assignment appears.
13. Click **OK**. You return to the Bio 1 tab of David’s constituent record.
14. On the toolbar, click **Save and Close**.

## View a Solicitor Assignment

From the Relationships tab of a constituent record, you can view information about solicitors assigned to the constituent. Open the constituent record of the constituent to whom solicitors are assigned. Select the Relationships tab and select **Assigned Solicitors** from the tree view. In the grid, all the constituent’s solicitor assignments appear. You can open each solicitor entry to edit the assignment information and you can delete assignments, if you have proper security rights. From the right-click menu, you can print a copy of the grid or you can export the grid information to another application.

You can also view solicitor assignment information from the Assignments tab of the Solicitor Information screen. For information about how to access Solicitor Details, see “View Solicitor Details” on page 305. To view assignments by campaign, fund, appeal, or date range, you apply filters to the information in the assignment grid. The grid on the Assignments tab lists the constituents to whom a solicitor is assigned. You can view gift details for each gift assigned to the solicitor for the selected constituent assignment. From the right-click menu, you can print the information on the Assignments tab grid or you can export the grid to another application.

### ► View a solicitor assignment from the Relationships tab

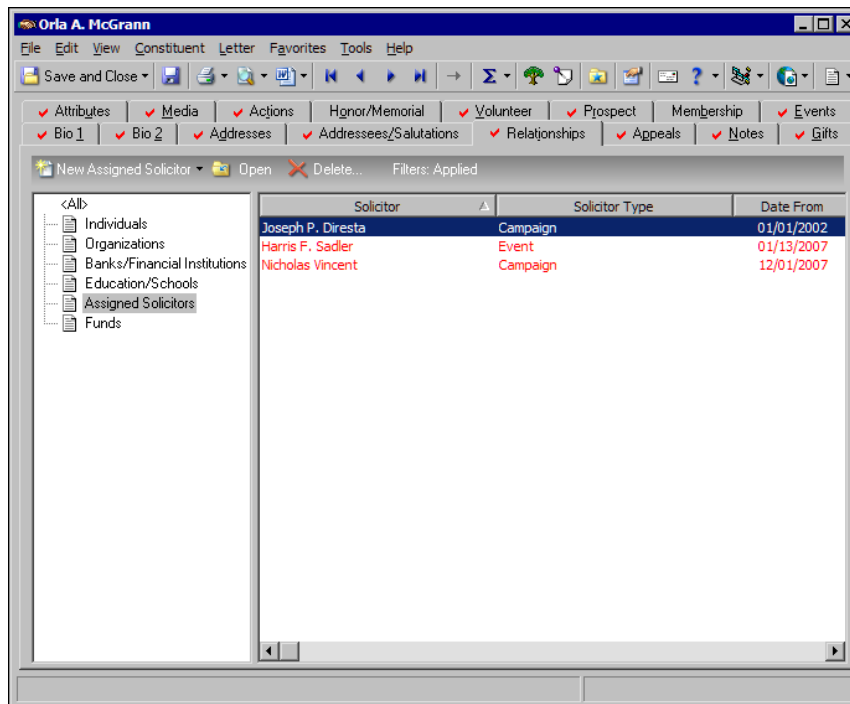
**Note:** From the Color tab of User Options, you can select the color in which assigned solicitors appear on the Relationships tab. For information about how to select a color, see the *Program Basics Guide*.

You can view information about solicitors assigned to a constituent from the constituent record of the individual or organization to which a solicitor has been assigned.

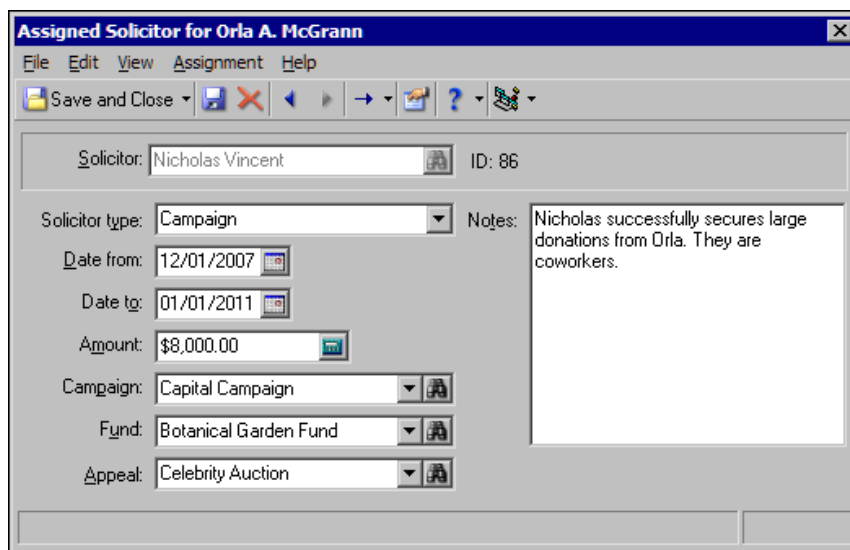
**Scenario:** Orla McGrann contributes several large donations to your organization each year. Because they successfully secure contributions from Orla, you want to find out which solicitors are assigned to her so you can assign them to other constituents in the future.

1. From Orla McGrann’s constituent record, select the Relationships tab. For more information about how to open records, see “Access Constituent Records” on page 4.

- From the tree view, select **Assigned Solicitors**. The solicitor assignments appear in the grid on the right.



- To view additional information for an solicitor assignment, select the solicitor in the grid and click **Open** on the action bar. The Assigned Solicitor screen appears.



- When you finish viewing the information, click **Save and Close** on the toolbar. You return to the Relationships tab of Orla's constituent record.
- Click **Save and Close**

► **View a solicitor assignment from the solicitor's constituent record**

You can view solicitor assignment information from the solicitor's constituent record.

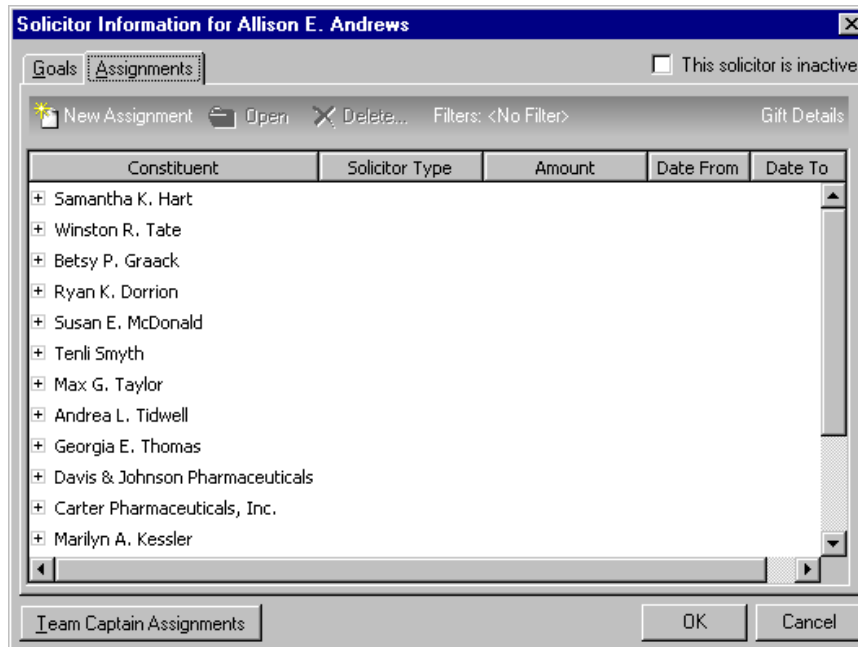
**Scenario:** You create a solicitor goal for Allison Andrews, a solicitor for your Playground Campaign. Now, you want to assign Allison to constituents in your database so she can reach her solicitor goal for this campaign. You want to see to which constituents Allison is currently assigned so you can determine whether to assign her to additional constituents.

1. From Allison Andrews's constituent record, select the Bio 1 tab. For information about how to open records, see "Access Constituent Records" on page 4.

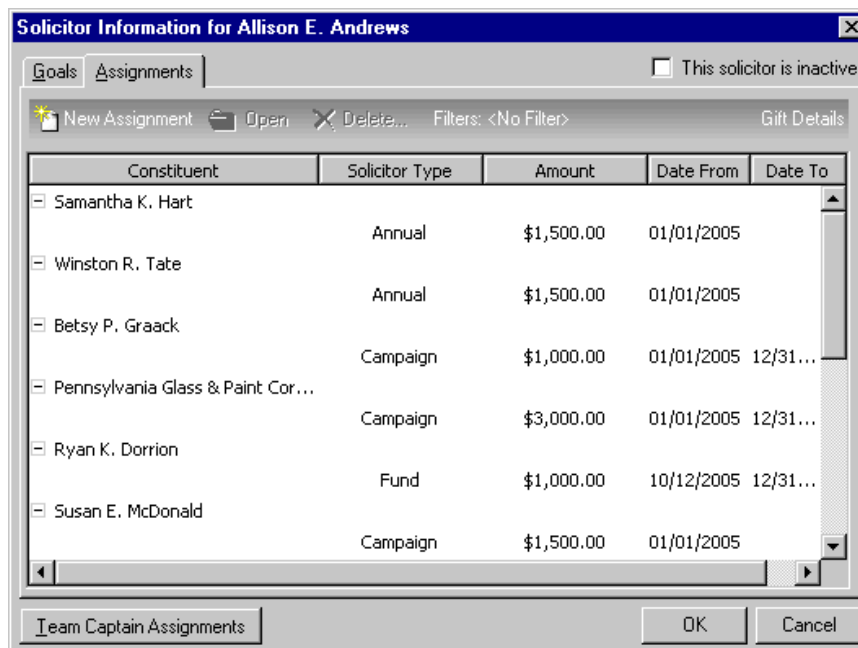
DNC	Type	Number/Email Address	Shared?
	Home	612-321-0047	Shared
	Cell Phone	612-393-0029	Cannot be Sh...
	Email	AEA@anet.com	Cannot be Sh...

2. Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

3. To view Allison's constituent assignments, select the Assignments tab.



4. To view additional information about each assignment, in the **Constituent** column, click the plus sign on the left of each entry.



5. When you finish viewing information for each assignment, click **OK**. You return to the Bio 1 tab of Allison's constituent record.
6. On the toolbar, click **Save and Close**.

► **View gift details for a solicitor assignment**

When the constituent to whom a solicitor is assigned contributes a gift and the solicitor receives credit for the contribution, the gift information appears on the Assignments tab of the solicitor's constituent record.

**Scenario:** Ryan Dorrien recently contributed \$500 to your Acquisition Fund. Allison Andrews is the solicitor assigned to Ryan for this fund. You want to view Allison's assignment information to verify she received full credit for Ryan's gift.

1. From Allison Andrews's constituent record, select the Bio 1 tab. For information about how to open records, see "Access Constituent Records" on page 4.

**Allison E. Andrews**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical**

Last name: Andrews Aliases  
 First name: Allison  
 Middle name: Eve  
 Titles: Mrs.  
 Suffixes: , Ph.D.  
 Nickname: Allie  
 Maiden name: Kersher  
 ID: 4  
 Gender: Female SSN: 369-52-1114  
 Birth date: 07/25/1960 Age: 47  
 Deceased? Date:   
 Marital status: Married  
 Spouse: Dustin S. Andrews  
 Solicit code: Do not phone at work

**Preferred Address : Home**

Country: United States More...  
 Address lines: 4859 Philpot Lane  
 City: Minneapolis  
 State: MN Minnesota  
 ZIP: 55403 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	612-321-0047	Shared
	Cell Phone	612-393-0029	Cannot be Sh...
	Email	AEA@anet.com	Cannot be Sh...

**This constituent**

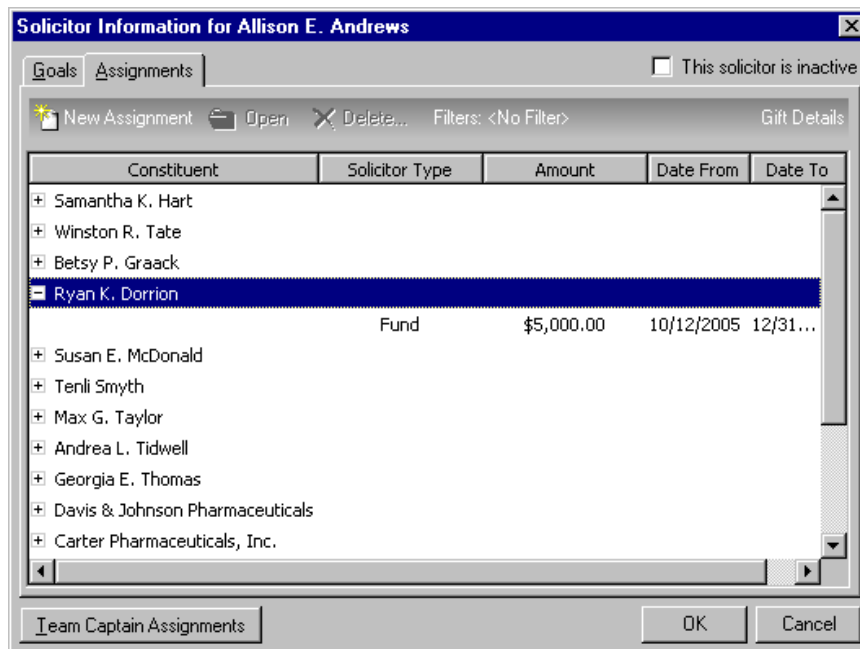
Is inactive  Is a solicitor Details  
 Gives anonymously  Has no valid addresses  
 Requests no email

Alumnus (05/1982 -)

Education Business Bank

2. Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

3. Select the Assignments tab.



4. To view all assignments Allison has for Ryan, in the **Constituent** column, click the plus sign to the left of Ryan Dorrior's name.
5. On the action bar, click **Gift Details**. The gifts Ryan has contributed that are credited to Allison appear.



6. On the action bar, click **Close**. You return to the Assignments tab.
7. Click **OK**. You return to the Bio 1 tab of Allison Andrews's constituent record.
8. On the toolbar, click **Save and Close**.

## Edit a Solicitor Assignment

**Note:** You establish security in *Administration*. For more information about user rights, see the Security chapter of the *Configuration & Security Guide*.

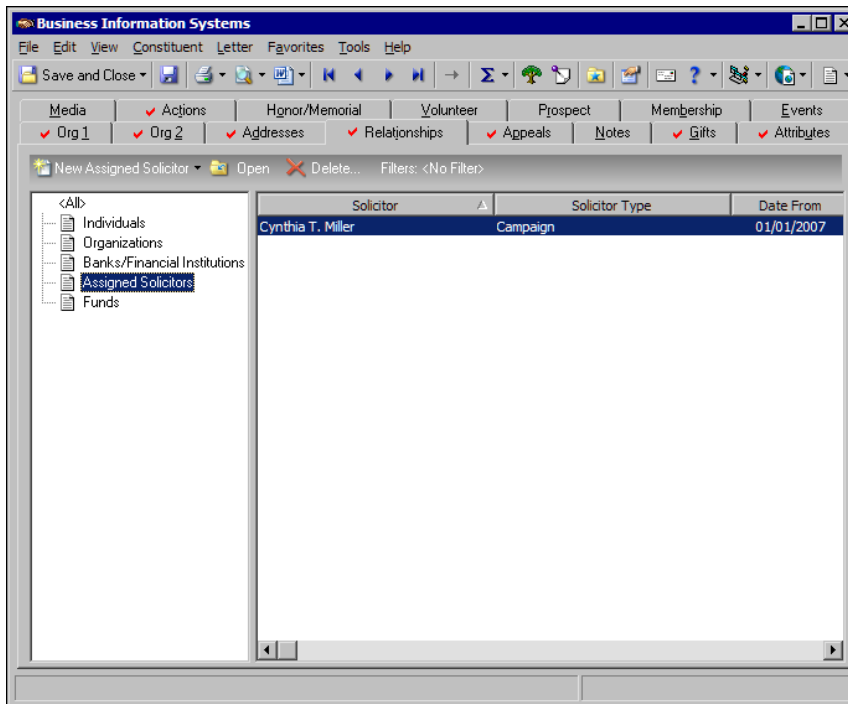
If you have proper security rights, you can edit a solicitor assignment from the constituent record of the individual or organization to which the solicitor is assigned. You can also edit a solicitor assignment from the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the solicitor's constituent record. For more information about how to access the Assignments tab, see "Solicitor Assignments" on page 311.

► **Edit a solicitor assignment from the Relationships tab**

Once you create a solicitor assignment, you can edit the assignment information from the constituent record of the individual or organization to which the solicitor is assigned.

**Scenario:** Cynthia Miller is a solicitor assigned to Business Information Systems. The company experienced tremendous growth in the last year, and you decide to increase the amount Cynthia requests Business Information Systems to contribute to your organization. From the Relationships tab of Business Information Systems' constituent record, open the solicitor assignment and increase the amount.

1. From Business Information Systems's constituent record, select the Relationships tab. For information about how to open records, see "Access Constituent Records" on page 4.
2. From the tree view, select **Assigned Solicitors**. In the grid, the solicitors assigned to Business Information Systems appear.



3. Select the solicitor assignment for “Cynthia Miller” and click **Open** on the action bar. The Assigned Solicitor screen appears.

**Assigned Solicitor for Business Information Systems**

File Edit View Assignment Help

Save and Close [Save] [Close] [Back] [Forward] [Search] [Help] [Refresh]

Solicitor: Cynthia Miller ID: 150

Solicitor type: Campaign Notes: Cynthia has great success working with our larger clients.

Date from: 01/01/2007

Date to: 12/31/2013

Amount: \$10,000.00

Campaign: Endowment Campaign

Fund: Annabelle Johnson Endowme

Appeal: Annual Exhibit

**Note:** The changes you make to the solicitor assignment information also appear on the solicitor’s constituent record. They appear on the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the Bio 1 tab. For an organization constituent record, the **Details** button appears on the Org 1 tab.

4. In the **Amount** field, change the original amount to \$20,000.
5. On the toolbar, click **Save and Close**. You return to the Relationships tab of Business Information System’s constituent record.
6. Click **Save and Close**.



► **Edit a solicitor assignment from the solicitor’s constituent record**

Once you create a solicitor assignment, you can edit the solicitor assignment from the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the solicitor’s constituent record.

**Scenario:** Lane Pembroke is a solicitor assigned to Robert Hernandez. Lane has worked with Robert for years. This year, Lane believes he can persuade Robert to give \$25,000 to your organization; \$5000 more than the original amount of \$20,000. From Lane’s constituent record, open the solicitor assignment and change the amount.

1. From Lane Pembroke’s constituent record, select the Bio 1 tab. For information about how to open records, see “Access Constituent Records” on page 4.

DNC	Type	Number/Email Address	Shared?
	Home	607-555-8134	Not Shared

2. Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.
3. Select the Assignments tab.

4. To view the list of assignments, in the **Constituent** column, beside Robert Hernandez, click the plus sign.

**Solicitor Information for Lane A. Pembroke**

Goals Assignments  This solicitor is inactive

New Assignment Open Delete... Filters: <No Filter> Gift Details

Constituent	Solicitor Type	Amount	Date From	Date To
Robert C. Hernandez	Volunteer	\$20,000.00	06/01/2000	05/31/2005
Clara M. Daniels				

Team Captain Assignments OK Cancel

5. Select the solicitor assignment to edit and click **Open** on the action bar. The Solicitor Assignment screen appears.

**Solicitor Assignment for Lane A. Pembroke**

File Edit View Assignment Help

Save and Close

Constituent: Robert Hernandez ID: 96

Solicitor type: Volunteer Notes: Lane and Robert are golfing partners. Lane is sure to secure his goal over the next five years.

Date from: 06/01/2007

Date to: 05/31/2012

Amount: \$20,000.00

Campaign: Capital Campaign

Fund: Building Fund

Appeal:

**Note:** The changes you make to the solicitor assignment information also appear on the Relationships tab of the constituent record to which the solicitor is assigned.

6. In the **Amount** field, change the original amount to \$25,000.
7. On the toolbar, click **Save and Close**. You return to the Assignments tab.
8. Click **OK**. You return to the Bio 1 tab of Lane's constituent record.
9. On the toolbar, click **Save and Close**.

## Delete a Solicitor Assignment

**Note:** You establish security in *Administration*. For more information about user rights, see the Security chapter of the *Configuration & Security Guide*.

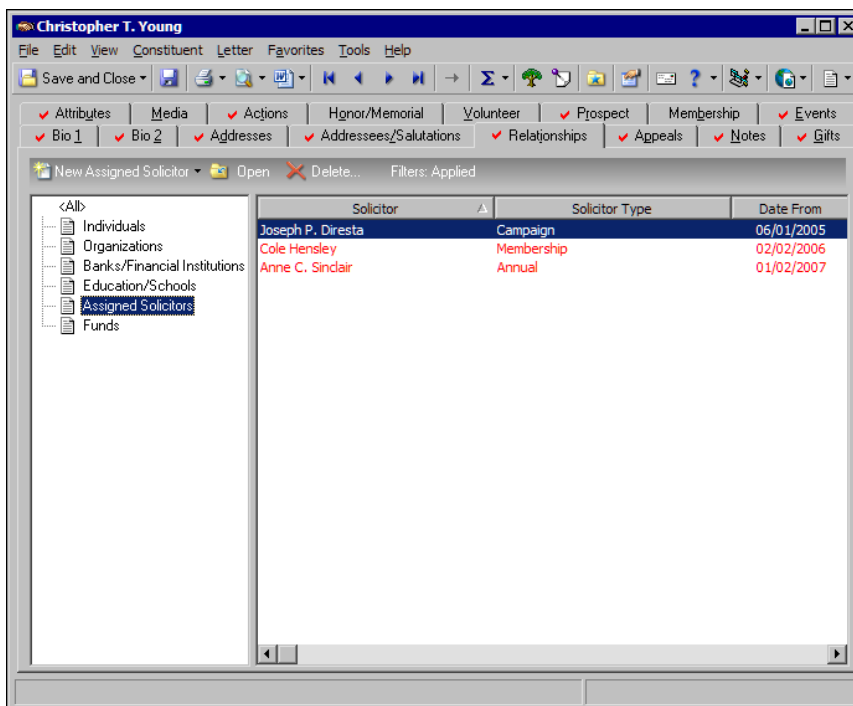
If you have proper security rights, you can delete solicitor assignments from the constituent record of the individual or organization to which the solicitor is assigned. You can also delete solicitor assignments from the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the Bio 1 or Org 1 tab of the solicitor's constituent record. Once you delete a solicitor assignment, the program permanently removes the assignment information from both places.

### ▶ Delete a solicitor assignment from the Relationships tab

You can delete a solicitor assignment from the constituent record of the individual or organization to whom the solicitor is assigned.

**Scenario:** Joseph Diresta is a solicitor for your Botanical Garden Fund. Joseph is assigned to his golf partner, Christopher Young, for this fund. Several of Christopher's relatives recently experienced damage to their property because of a severe earthquake. In response to this disaster, Christopher lets you know he will now contribute only to your Natural Disaster Relief Fund. Delete Joseph's solicitor assignment to Christopher for the Botanical Garden Fund.

1. From Christopher Young's constituent record, select the Relationships tab. For information about how to open records, see "Access Constituent Records" on page 4.
2. From the tree view on the left, select **Assigned Solicitors**. Solicitors assigned to Christopher appear in the grid on the right.



3. Select the solicitor assignment for "Joseph Diresta" and click **Delete** on the action bar. The Assigned Solicitor screen opens and a message appears to ask whether to delete the assignment.

4. Click **Yes**. Joseph is no longer assigned to Christopher. The program also removes this solicitor assignment from the Assignments tab of Joseph's constituent record.
5. On the toolbar, click **Save and Close**.

► **Delete a solicitor assignment from the solicitor's constituent record**

You can delete a solicitor assignment from the Assignments tab of the Solicitor Information screen, accessed from the **Details** button on the solicitor's constituent record.

**Scenario:** Audrey Lorenz is a solicitor for your Capital Campaign. You assigned Audrey to Porter Nelson as his solicitor for this campaign for the next three years. You later realize that you assigned Audrey to Porter by mistake. Harris Sadler is already been assigned to Porter for this campaign and has successfully achieved donations. From Audrey's constituent record, delete her constituent assignment to Porter.

1. From Audrey Lorenz's constituent record, select the Bio 1 tab. For more information about how to open records, see "Access Constituent Records" on page 4.

**Audrey I. Lorenz**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical**

Last name: Lorenz Aliases  
 First name: Audrey  
 Middle name: Irene  
 Titles: Ms.  
 Suffixes:  
 Nickname: Sis  
 Maiden name:  
 ID: 46  
 Gender: Female SSN: 259-45-5401  
 Birth date: 05/04/1971 Age: 37  
 Deceased? Date:  
 Marital status: Single  
 Spouse:  
 Solicit code:

**Preferred Address : Home**

Country: United States More...  
 Address lines: 578 Kings Way  
 City: Philadelphia  
 State: PA Pennsylvania  
 ZIP: 19125 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	215-339-4120	Not Shared

**This constituent**

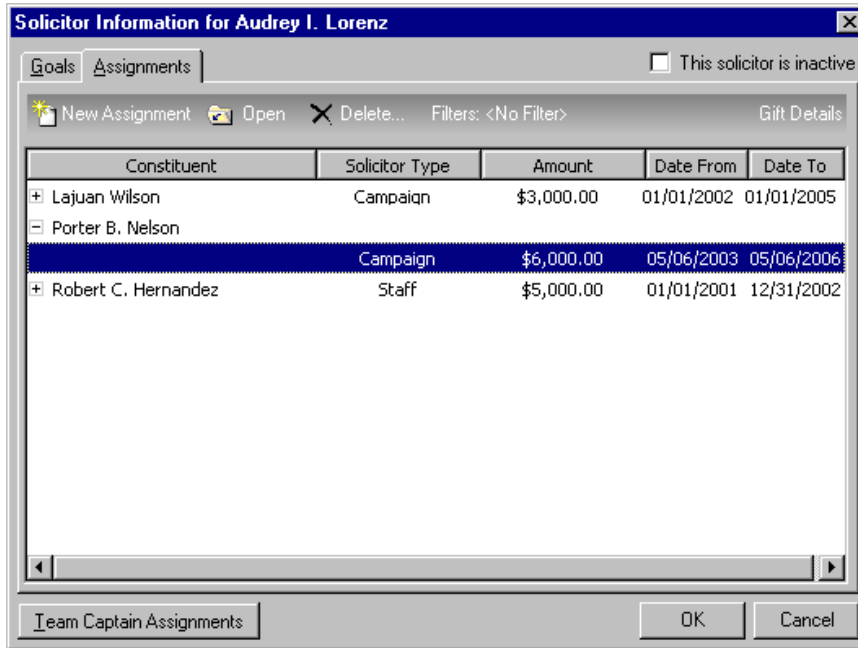
Is inactive  Is a solicitor **Details**  
 Gives anonymously  Has no valid addresses  
 Requests no email

Employee (06/15/1998 - )

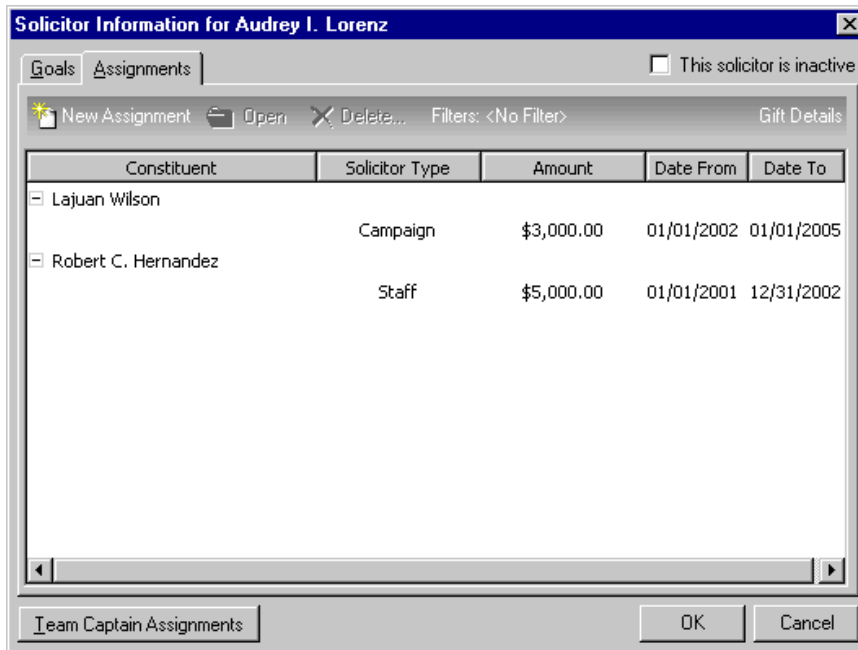
Education Business Bank

2. Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.
3. Select the Assignments tab

4. To view the list of assignments, in the **Constituent** column, beside Porter Nelson, click the plus sign.



5. Select the solicitor assignment to delete, and click **Delete** on the action bar. The Solicitor Assignment screen opens and a message appears to ask whether to delete the assignment.
6. Click **Yes**. You return to the Assignments tab. Porter is no longer assigned to Audrey for the Capital Campaign. The program also removes this solicitor assignment from the Relationships tab of Porter's constituent record.



7. Click **OK**. You return to Audrey's constituent record.
8. On the toolbar, click **Save and Close**.

## Solicitor Goals

**Note:** You establish security in *Administration*. For more information about user rights, see the Security chapter of the *Configuration & Security Guide*.

With the possible exception of team captains, solicitors associated with a campaign, a fund, or an appeal are responsible to obtain a certain amount of the overall goal for the campaign, fund, or appeal. For example, the overall goal for your Annual Campaign is \$50,000, but the solicitor, Jason Campbell, is responsible for only \$3,000 of the overall goal. To track the progress of your solicitors, we recommend you record the goal information for each solicitor. If you have proper security rights, you can enter this information on the Goals tab.

**Note:** For more information about setting up tables, see the *Configuration & Security Guide*.

You can create unspecified goals from the solicitor's constituent record. An unspecified goal is any solicitor goal amount that is not associated with a campaign, a fund, or an appeal. If you have security rights, you can enter categories of unspecified goals in the Solicitor Goal Categories table in *Configuration*. With unspecified goal categories, you can easily keep track of these solicitor goals. For example, your organization may have the unspecified goal category "Flowers" to cover the expense of flowers or plants your organization purchases as condolence or congratulatory gifts for constituents.

Solicitors with unspecified goals are responsible to secure the entire goal amount entered. Unlike a campaign, a fund, or an appeal, you cannot create a record for an unspecified goal. You can create categories to organize solicitor information for these goals, but unspecified goals do not have an overall goal amount like for a campaign, a fund, or an appeal. Unspecified goals may consist of contribution requests that do not have monetary value, such as to establish contacts or seek professional advice for your organization. Therefore, the goal amount for an unspecified goal may or may not be monetary.

Once you enter solicitor goal amounts for a campaign, a fund, an appeal, or other category, you can create reports based on solicitor information. From *Reports*, you can run the Solicitor Performance Analysis, the Solicitor Comparison Report, or the Solicitor Goal Summary to determine whether your solicitors reach their individual goals. From *Records*, you can create a Solicitor Performance Summary to track your solicitors' progress.

### Create a Solicitor Goal

You can associate a solicitor with a goal for a specific campaign, fund, or appeal, or you can create an unspecified goal for the solicitor to meet. From the solicitor's constituent record, or the record of the campaign, fund, or appeal, you can add the solicitor to a goal for a campaign, a fund, or an appeal. Once you designate a goal for the solicitor, the solicitor appears in the solicitor hierarchy for the campaign, fund, or appeal. To specify a goal that is not for a campaign, a fund, or an appeal, you can create an unspecified goal for a solicitor from the solicitor's constituent record.

When you add a solicitor to the solicitor hierarchy for a goal for a campaign, a fund, or an appeal, you can determine how much the solicitor is responsible to secure for the overall goal. For example, you add Cynthia Miller as a solicitor for your organization's Scholarship Campaign. The overall goal for this campaign is \$1 million. You assign Cynthia a solicitor goal amount of \$5,000. Cynthia is responsible to secure \$5,000 for the Scholarship Campaign. To reach this goal, you assign Cynthia to constituents in your database who she will ask to contribute to the Scholarship Campaign.

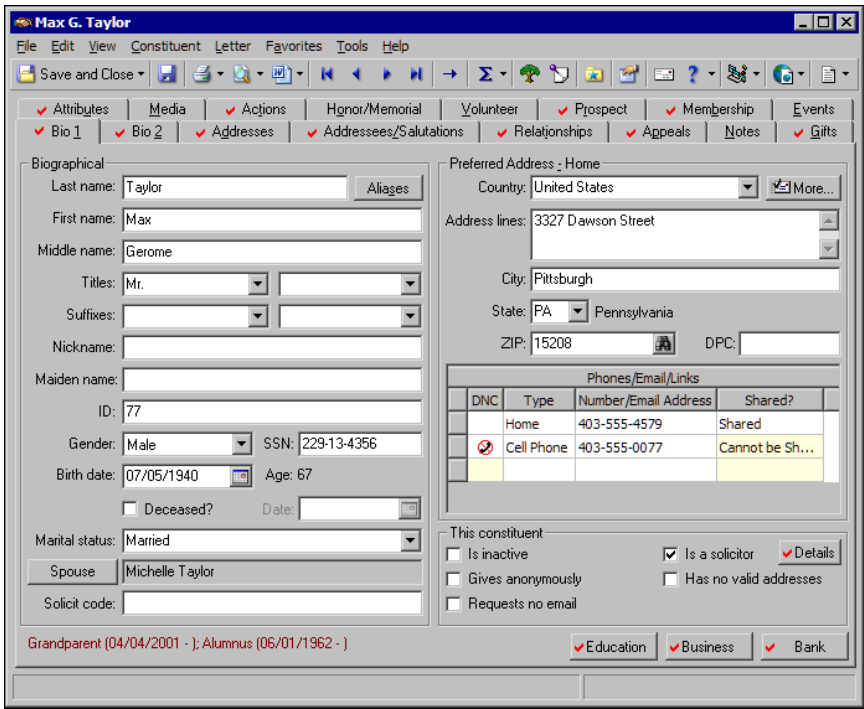
► **Create a solicitor goal from a constituent record**

To help secure the contributions necessary to meet the overall campaign, fund, or appeal goal, you can assign a portion of the overall goal for a campaign, a fund, or an appeal to solicitors in your organization.

**Scenario:** Max Taylor wants to work on your Building Fund. Max is an experienced solicitor. Assign him a solicitor goal of \$10,000 for this fund.

**Note:** From the Records tab of User Options, you can select how a constituent name appears on the constituent record title bar.

1. From Max Taylor’s constituent record, select the Bio 1 tab. For information about how to open records, see “Access Constituent Records” on page 4.



- Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

Type of Goal	Goal Amount	Campaign/Fund/Category	Reports To
Fund	\$5,000.00	2001 Annual Fund	Team A (Anne C. Sinclair)
Fund	\$2,000.00	Annabelle Johnson Endowm...	Team B (Max G. Taylor)

- On the Goals tab, click **New Goal** on the action bar. The Goal screen appears.

**Note:** The amount you enter in the **Goal Amount** field is the solicitor’s goal amount for the type of goal selected, not the overall goal amount.

- In the **Type of goal** frame, select **Fund**. Max requests to work as a solicitor for the Building Fund. In the **Fund** field, select “Building Fund”. You can click the binoculars to search your database for the fund.

**Tip:** In the **Goal amount** field, it is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

- In the **Goal amount** field, enter the amount \$10,000.
- Leave the **Reports to** field blank. Max does not report to anyone for this goal. If Max was part of a team, you would enter to whom Max reports, in this field.



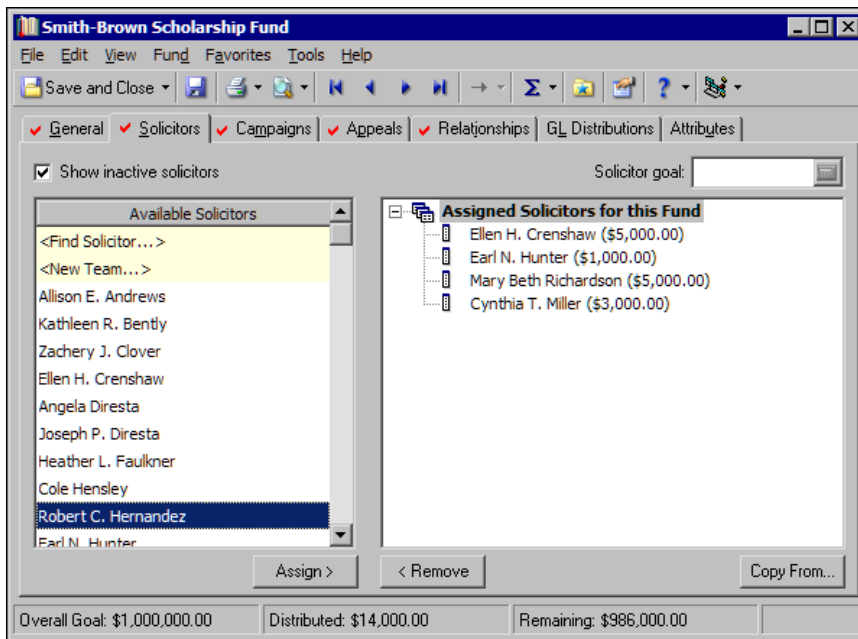
7. In the **Notes** box, enter “Max Taylor requests to work as a solicitor for the Building Fund.”
8. On the toolbar, click **Save and Close**. You return to the Goals tab. In the grid, Max’s solicitor goal information for the Building Fund appears.
9. Click **OK**. You return to the Bio 1 tab of Max’s constituent record.
10. On the toolbar, click **Save and Close**.

▶ **Create a solicitor goal from a campaign record, a fund record, or an appeal record**

You can assign a solicitor to a goal for a campaign, a fund, or an appeal from the record of the campaign, fund, or appeal.

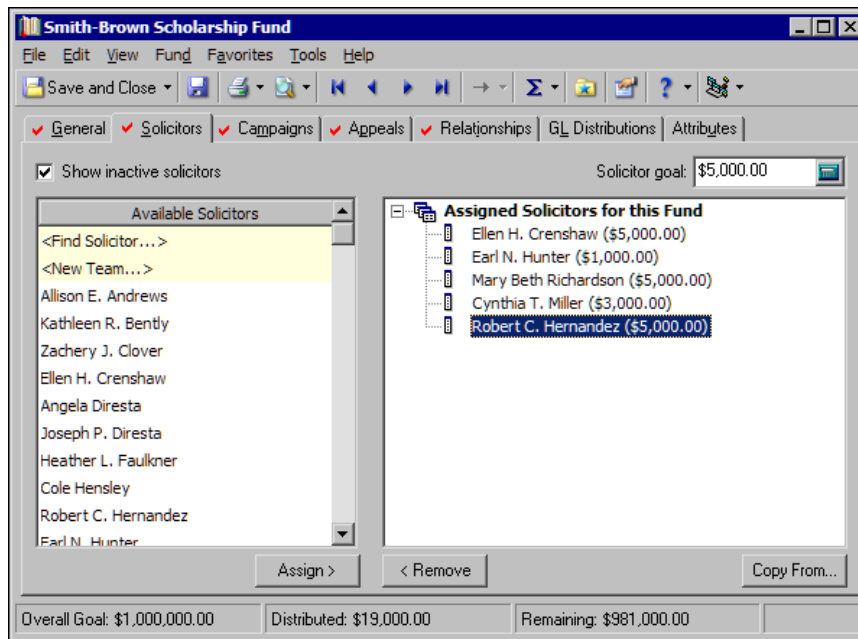
**Scenario:** You create solicitor goals for your Smith-Brown Scholarship Fund. Add Robert Hernandez to the solicitor hierarchy for this fund with a goal amount of \$5,000.

1. From the Smith-Brown Scholarship Fund record, select the Solicitors tab. For information about how to open a fund record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. In the **Available Solicitors** box, scroll down and select Robert Hernandez and click **Assign**. In the **Assigned Solicitors for this Fund** box, Robert appears.
3. In the **Assigned Solicitors** box, select Robert’s name.

4. In the **Solicitor goal** field, enter the amount \$5,000.



**Note:** The overall campaign or fund goal amount appears at the bottom of the Solicitors tab. The goal amount for each solicitor you select appears in the **Solicitor goal** field. Additional panels at the bottom of the tab display the amount of the overall goal that has been distributed and the amount that remains to be distributed.

Robert does not report to anyone for this goal. If Robert was part of a team, you would first enter the team or solicitor to who he reports, and then enter him underneath to show the solicitor hierarchy. Robert's solicitor goal is included in the Distributed and Remaining amounts at the bottom of the screen.

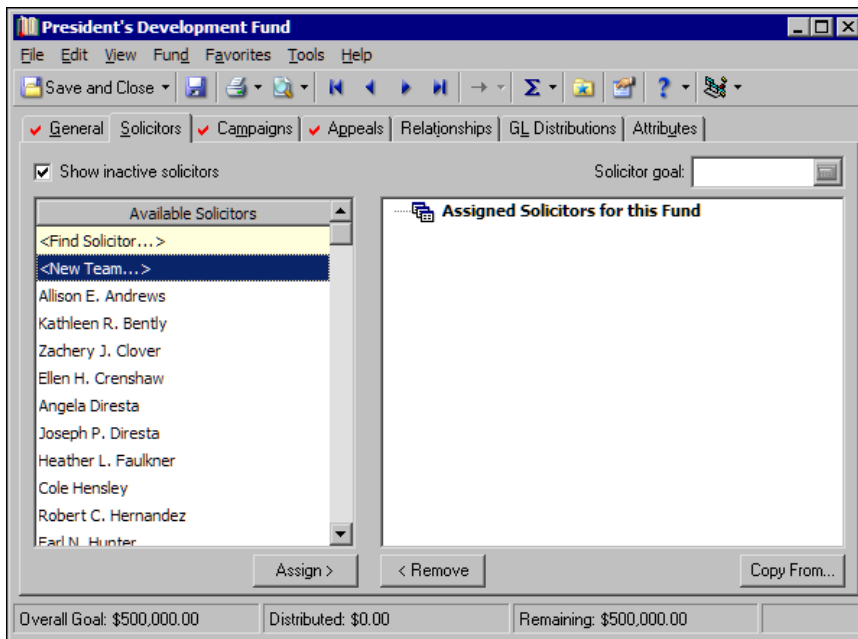
5. To save the information and close the fund record, click **Save and Close** on the toolbar.

► **Copy solicitor goals to a campaign, a fund, or an appeal**

To copy the solicitor goals for one campaign, fund, or appeal to another campaign, fund, or appeal record, click **Copy From**. When you copy solicitor goals, you save time because you do not have to enter the solicitor information twice. However, when you copy the solicitor information from one campaign, fund, or appeal to another, you overwrite any solicitor information already entered for the campaign, fund, or appeal.

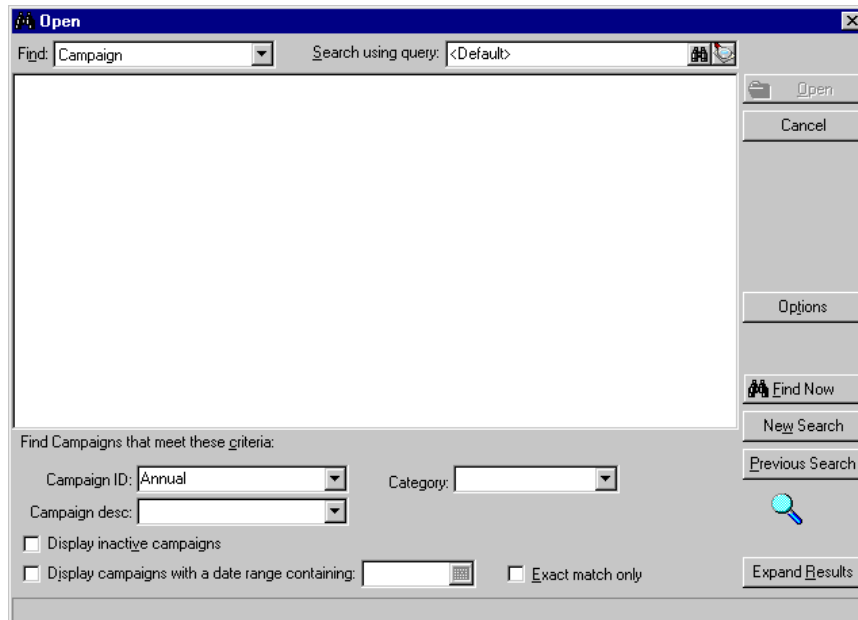
**Scenario:** The solicitors for your Annual Campaign want to work on an additional project. Because these solicitors work well together, you want them to work on the same fundraising goal. Add the solicitors for the Annual Campaign to the President’s Development Fund.

1. From the record of the President’s Development Fund, select the Solicitors tab. For information about how to open a fund record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. Click **Copy From**. The Open screen for funds appears.

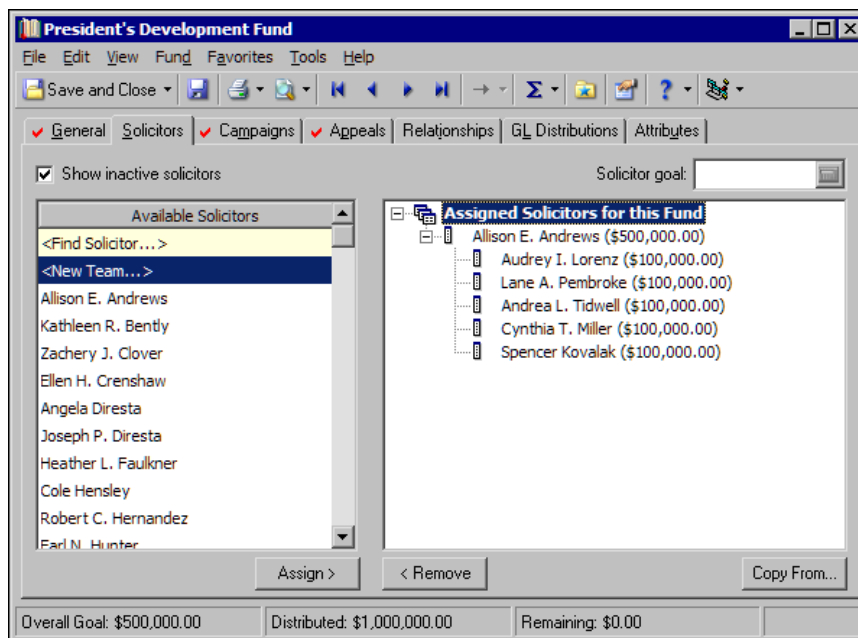
- In the **Find** field, select “Campaign”.



- Search for the Annual Campaign. For information about how to open a campaign record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

**Note:** At the bottom of the Solicitors tab, the overall goal amount for the campaign, fund, or appeal appears. In the **Solicitor goal** field, the goal amount for the selected solicitor appears. Additional fields at the bottom of the tab display the amount of the overall goal that has been distributed and the amount that remains to be distributed.

- Select the “Annual Campaign” and click **Open**. The solicitor hierarchy for the Annual Campaign appears in the **Assigned Solicitors for this Fund** box on the Solicitors tab.



- To save the new solicitor hierarchy information, click **Save and Close** on the toolbar. Once you save and close the record, when you reopen the record, the **Distributed** and **Remaining** fields are updated.

## View a Solicitor Goal

You can view information about a solicitor's goal on the Goals tab of the Solicitor Information screen. For information about how to access Solicitor Details, see "View Solicitor Details" on page 305. To view goals by campaign, fund, appeal, category, or type, you apply filters to the information in the Goals grid. The Goals grid displays the type of goal, the goal amount, the campaign, fund, appeal, or other category for which the goal was created; and, if the solicitor reports to another solicitor, the name of the solicitor to whom he reports. To print the information in the Goals grid or export the information to another application, use the right-click menu.

### ► View a solicitor goal

You can view a solicitor's goal information from the solicitor's constituent record.

**Scenario:** You create a solicitor goal for Robert Hernandez, a solicitor for your Membership Campaign. You want to view the amount of Robert's goal for this campaign. To view his goal, open the Solicitor Information screen from his constituent record.

1. From Robert Hernandez's constituent record, select the Bio 1 tab. For information about how to open records, see "Access Constituent Records" on page 4.

The screenshot shows a web application window titled "Robert C. Hernandez". The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a row of tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The "Bio 1" tab is selected.

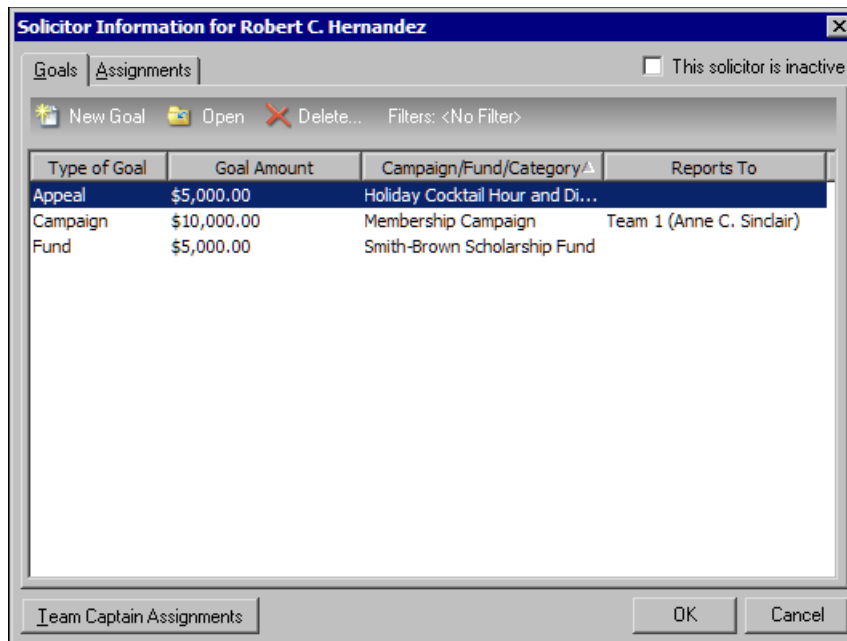
The "Bio 1" tab displays the following information:

- Biographical:**
  - Last name: Hernandez (with an "Aliases" link)
  - First name: Robert
  - Middle name: Carlos
  - Titles: Dr.
  - Suffixes:
  - Nickname: Bob
  - Maiden name:
  - ID: 96
  - Gender: Male
  - SSN: 248-59-9388
  - Birth date: 03/14/1961 (Age: 47)
  - Deceased? (checkbox)
  - Marital status: Married
  - Spouse: Wendy Hernandez
  - Solicit code: Do not phone on weekends; Do not call after 9:0
- Preferred Address: Home**
  - Country: United States
  - Address lines: 410 17th Street
  - City: Denver
  - State: CO (Colorado)
  - ZIP: 80202-4402
  - DPC: 99
- Phones/Email/Links**

DNC	Type	Number/Email Address	Shared?
	Home	303-997-3301	Shared
	Beeper	303-937-2000	Cannot be Sh...
	Email	robertcarloshernand...	Cannot be Sh...
- This constituent**
  - Is inactive
  - Is a solicitor
  - Details
  - Gives anonymously
  - Has no valid addresses
  - Requests no email

At the bottom of the screen, there is a status bar showing: Board Member (01/01/2005 - ); Volunteer (03/2000 - ); Alumnus (09/1987 - ). There are also buttons for Education, Business, and Bank.

- Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears. On the Goals tab, view information about Robert's Membership Campaign goal, including the goal amount and the solicitor to whom Robert reports for this goal.



- Click **OK**. You return to the Bio 1 tab.
- On the toolbar, click **Save and Close**.

## Edit a Solicitor Goal

You can edit a solicitor goal from the solicitor's constituent record or from the record of the campaign, fund, or appeal. Once you save the changes made to a solicitor goal, you can view the new information from the Goals tab of the solicitor's constituent record. For information about how to access the Goals tab, see "View a Solicitor Goal" on page 336.

► **Edit a solicitor goal from a constituent record**

Once you create a solicitor goal, you can edit the goal information from the solicitor’s constituent record.

**Scenario:** RCS Corporation is a solicitor for your Endowment Campaign. You create a solicitor goal of \$10,000 for RCS Corporation for this campaign. A representative for the company calls to ask that you increase RCS’s solicitor goal amount to \$20,000. Change the solicitor goal from RCS Corporation’s constituent record.

1. From RCS Corporation’s constituent record, select the Org 1 tab. For information about how to open records, see “Access Constituent Records” on page 4.

The screenshot shows a software window titled "RCS Corporation" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar are several tabs: Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Org 1, Org 2, Addresses, Relationships, Appeals, Notes, Gifts, Attributes, and Media. The "Org 1" tab is selected.

Fields include:

- Org Name: RCS Corporation
- ID: 112
- Preferred Address: Business
- Country: United States
- Address lines: 1259 Six Forks Road
- City: Raleigh
- State: NC (North Carolina)
- ZIP: 27609
- DPC: [empty]

There is a table for "Phones/Email/Links":

D...	Type	Number/Email A...	Shared?
	Business	919-555-2369	Shared
	Fax	919-555-9865	Shared

Other sections include:

- Organization matches Gifts
- Matching Gift Information: Factor: 1.50, Fiscal year starts: 06/01
- Matching Gift Limits table:

	Minimum	Maximum
Per gift	\$15.00	\$2,000.00
Annual per donor	\$15.00	\$5,000.00
Total per donor	\$15.00	\$10,000.00

Notes: RCS matches for full-time employees, who have been with the company for over a year.

This constituent section has checkboxes for:
 

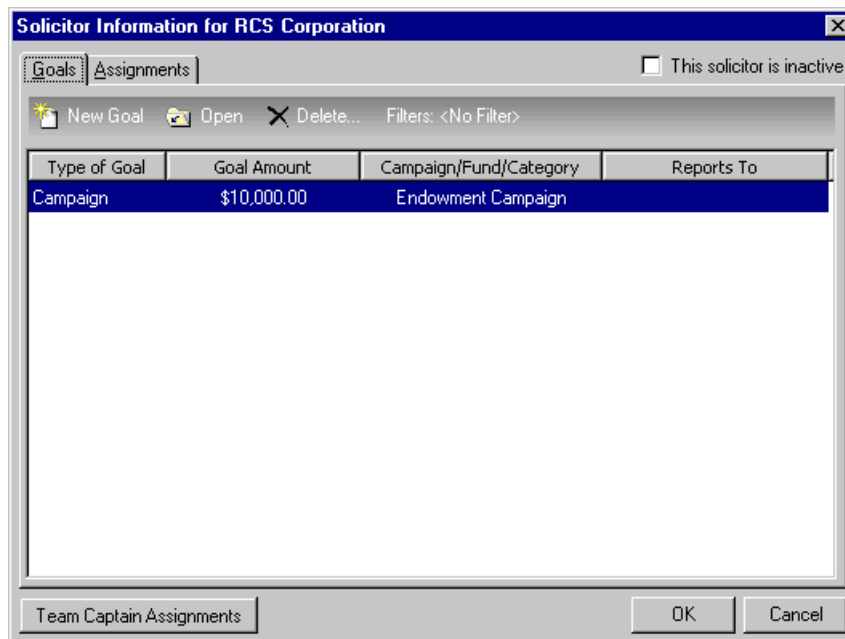
- Is inactive
- Is a solicitor
- Gives anonymously
- Has no valid addresses
- Requests no email

Solicit code: One solicitation annually

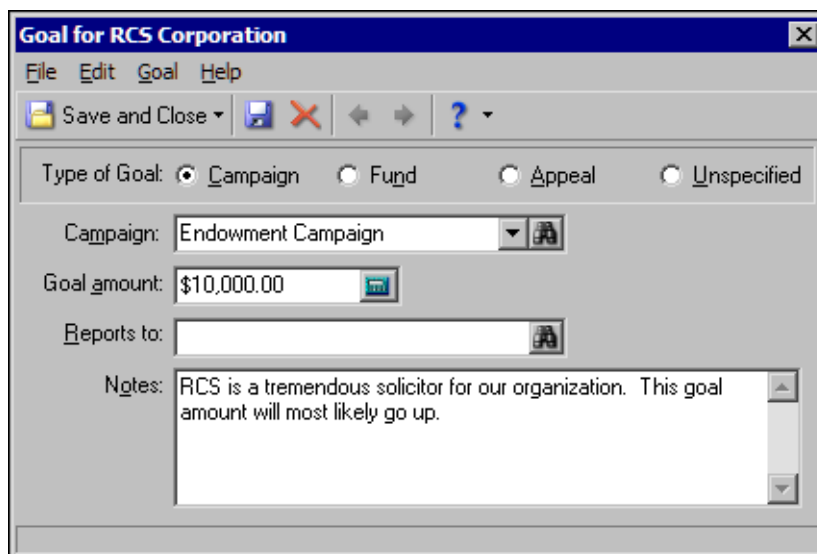
Corporation\Business; Major Donor Prospect (01/01/1995 - 07/09/1998)

Buttons: Bank

- Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.



- Select the Endowment Campaign goal and click **Open** on the action bar. The Goal screen appears.



**Tip:** In the **Goal amount** field, you do not need to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

- In the **Goal amount** field, change the amount to \$20,000.
- On the toolbar, click **Save and Close**. You return to the Goals tab. The **Goal amount** column contains the new solicitor goal amount for RCS Corporation.
- Click **OK**. You return to the Org 1 tab of RCS Corporation's constituent record.
- On the toolbar, click **Save and Close**.



► **Edit a solicitor goal from a campaign record, a fund record, or an appeal record**

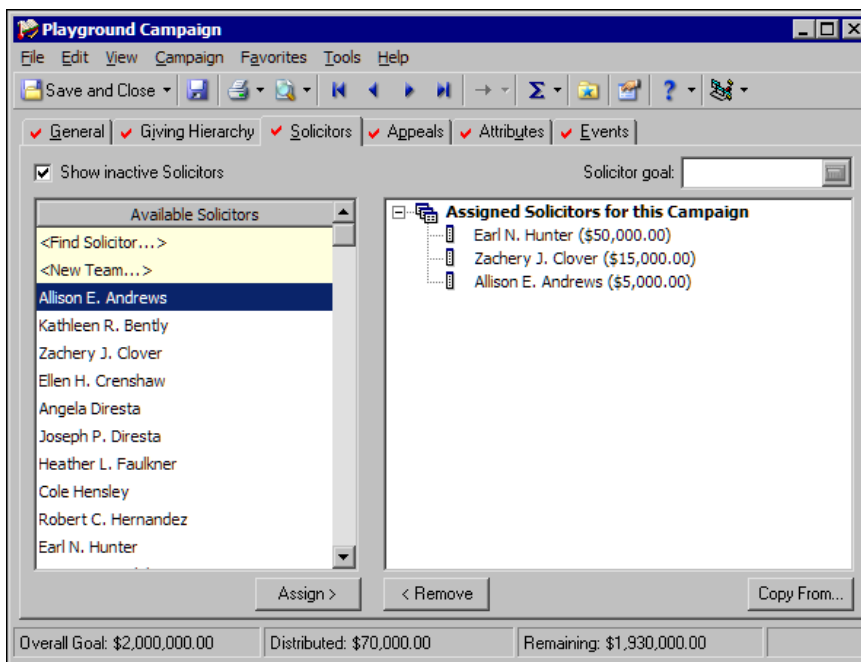
**Note:** A red check mark on the Solicitors tab indicates the tab contains solicitor information.

Once you create a solicitor goal for a campaign, a fund, or an appeal, you can edit the goal information from the record of the campaign, fund, or appeal.

**Scenario:** Zachary Clover, a solicitor for your Playground Campaign, is about to reach his solicitor goal of \$15,000 for this campaign. You want to increase Zachary's solicitor goal for this campaign to \$30,000. Change his goal amount from the campaign record.

**Note:** At the top of the solicitor hierarchy screen, the overall campaign or fund goal amount appears. A panel at the bottom of the screen displays the goal amount for each selected solicitor or team. Additional fields display the amount of the overall goal that has been distributed and the amount that remains to be distributed.

1. From the record of the Playground Campaign, select the Solicitors tab. For information about how to open a campaign record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



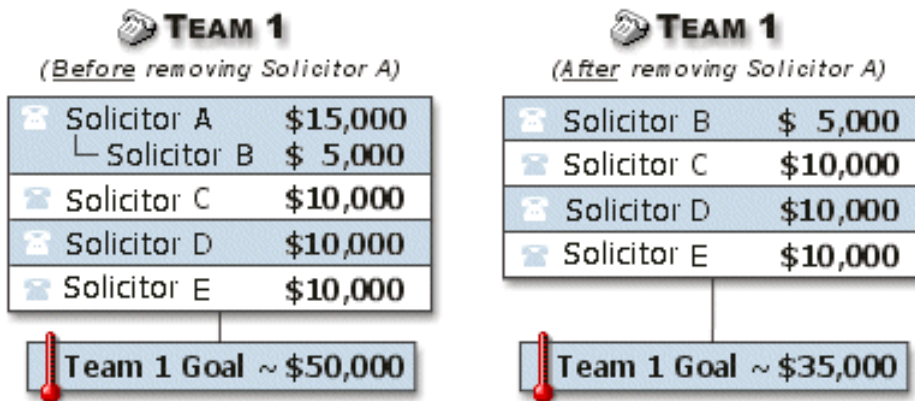
2. In the **Assigned Solicitors to this Campaign** box, select Zachary Clover.

**Tip:** In the **Solicitor goal** field, you do not need to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

3. In the **Solicitor goal** field, change the amount to \$30,000. The totals in the Distributed and Remaining fields at the bottom of the screen include Zachary's new solicitor goal amount.
4. On the toolbar, click **Save and Close**.

## Delete a Solicitor Goal

You can delete a solicitor goal from the solicitor's constituent record or from the record of the campaign, fund, or appeal. When you delete a solicitor's goal, you remove the solicitor from the goal hierarchy of the campaign, fund, or appeal. Imagine the solicitor hierarchy as a three layer cake. A team is the top layer. Solicitors who report to the team are the middle layer, and solicitors who report to other solicitors are the bottom layer. If you delete a solicitor's goal, you can also delete the goals of those who report to this solicitor or you can save these goals. If you save the goals, these solicitors are no longer in the bottom layer of the cake. Instead, they move up to the middle layer and report to the team.



### ▶ Delete a solicitor goal

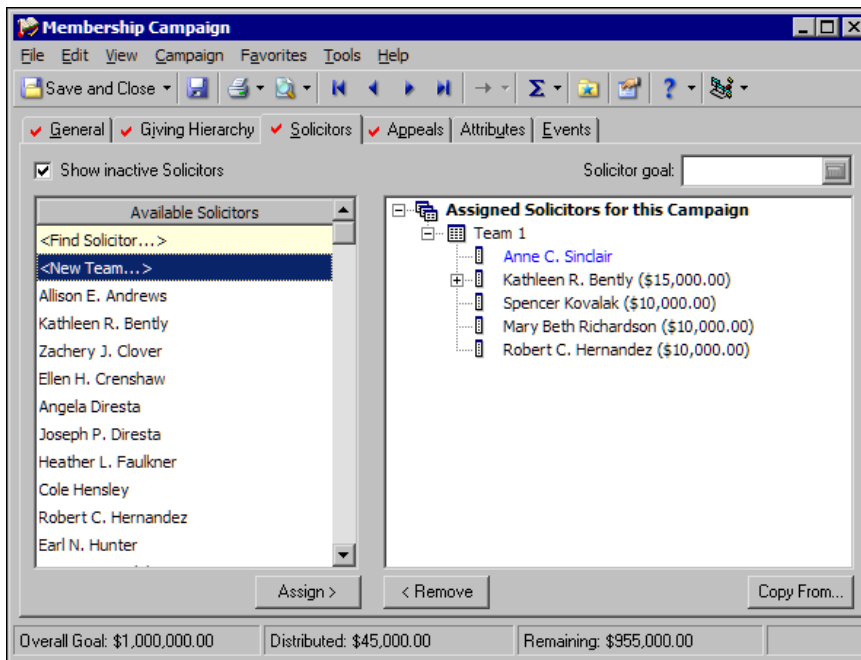
**Note:** A red check mark on the Solicitors tab indicates the tab contains solicitor information.

When you delete a solicitor's goal, you can also delete the goals of those who report to this solicitor, or you can save these goals.

**Scenario:** Kathleen Bently and Lane Pembroke are part of the solicitor hierarchy for the Membership Campaign. Lane, who has only worked as a solicitor for a few months, reports to Kathleen. Kathleen decides to focus on contributions for your Annual Campaign, so she asks to be removed from the list of solicitors for the Membership Campaign. Delete Kathleen's goal from the Membership Campaign solicitor hierarchy. When Kathleen is removed from the solicitor hierarchy, Lane can no longer report to her. He now reports directly to Team 1. Kathleen's goal amount is also subtracted from the team's goal amount.

**Note:** The overall goal amount appears at the bottom of the Solicitors tab. In the **Solicitor goal** field, the goal amount for the selected solicitor appears. Additional panels at the bottom of the tab display the amount of the overall goal that has been distributed and the amount that remains to be distributed.

1. From the record of the Membership Campaign, select the Solicitors tab. For information about how to open a campaign record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. To view the solicitor hierarchy for the goal, click the plus sign to the left of “Team 1”.

**Note:** When you delete a selection from the **Assigned Solicitors** box, you only delete the solicitor’s goal for a campaign, a fund, an appeal, or an unspecified goal, not the overall goal.

3. In the solicitor hierarchy, select Kathleen’s entry and click **Remove**. A message appears to ask whether to remove the solicitor from the hierarchy.
4. Click **Yes**.

Because other solicitors report to Kathleen, a message appears to ask whether to also remove them from the hierarchy.

**Note:** If you click **Yes**, the solicitor, any solicitors who report directly to this solicitor, and their goals are removed from the hierarchy. For more information, see “What Is a Solicitor Team?” on page 296 and “Solicitor Teams” on page 343.

Click **No**. You do not want to remove Lane from the hierarchy. Once you delete Kathleen’s solicitor goal for the Membership Campaign, Lane’s solicitor goal moves up one level to indicate he now reports to Team 1. You return to the Solicitors tab. Kathleen is no longer a member of the solicitor hierarchy for the Membership Campaign and Lane now reports directly to Team 1.

5. On the toolbar, click **Save and Close**.

## Solicitor Teams

In *The Raiser's Edge*, you can organize your solicitors into teams. For large or long-term fundraising goals, solicitor teams can help motivate solicitors and keep everyone involved in the project informed. When you establish teams, you do not have to contact each solicitor who works on a particular campaign, fund, appeal, or other goal. Instead, you contact a representative of the team, usually a team captain, and this solicitor communicates your message to the team. Within the team, you can also have solicitors who report to other, often more experienced, members. Therefore, the captain may have to contact only certain team members, who in turn, contact the solicitors who report to them. No matter how simple or complex the structure may be, you can use teams to improve the success of your overall goals.

### Create a Team of Solicitors

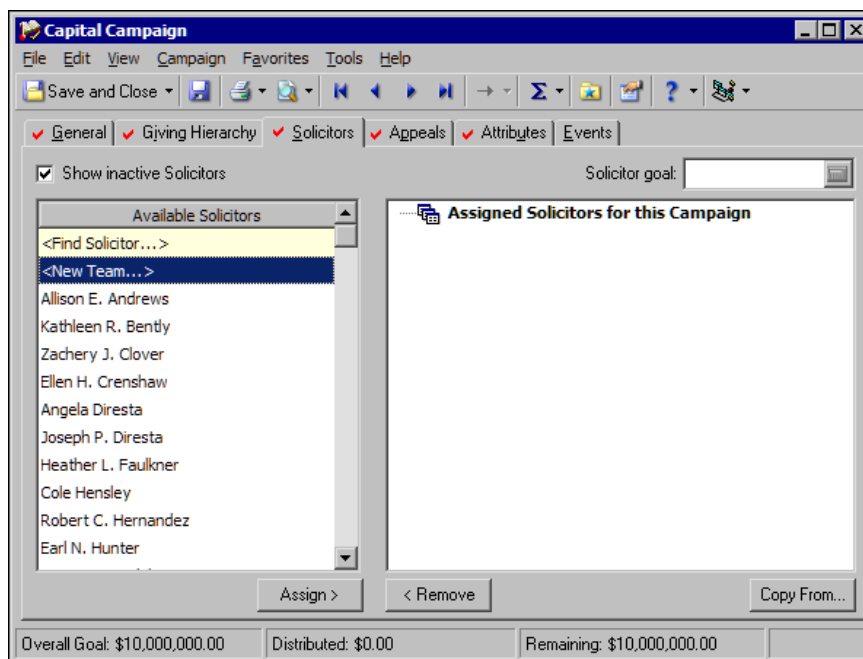
From the Solicitors tab of a campaign record, a fund record, or an appeal record, you can create solicitor teams for each of your organization's campaign, fund, or appeal goals. When you create a team of solicitors, you can select a name for the team, add team members, enter goal amounts for each team member, and determine whether a team member reports to another team member. Once you create a solicitor team, you can add members to the team from the campaign, fund, or appeal record. You can also add a solicitor to the team from the solicitor's constituent record.

#### ► Create a team of solicitors

When you determine which solicitors work on a particular fundraising project, you can organize these solicitors into teams.

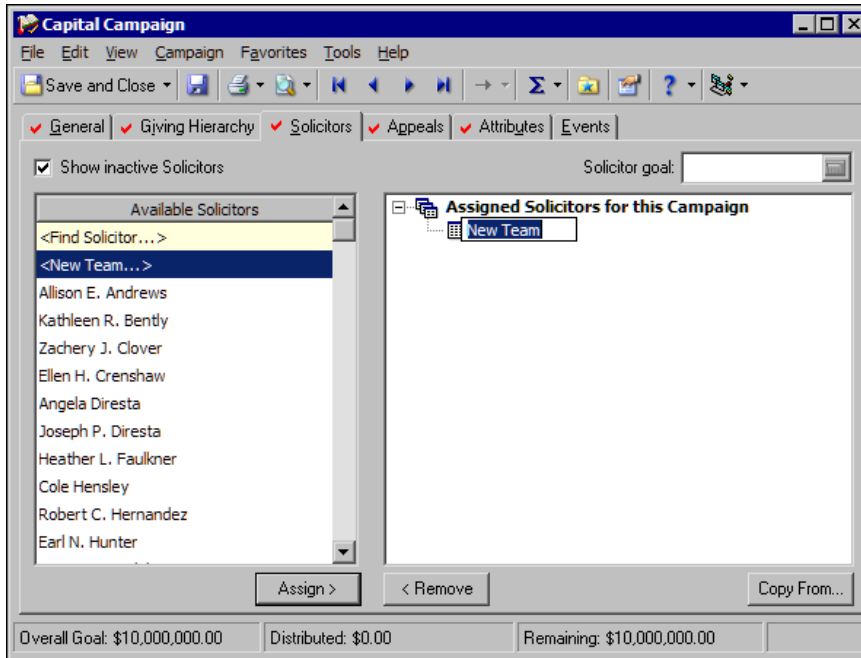
**Scenario:** For your Capital Campaign, you decide to organize solicitors into teams. To add an element of fun, you name the teams after playing card suits: Team Hearts, Team Clubs, and Team Diamonds. For Team Hearts, enter three team members and create a solicitor goal of \$5,000 for each member.

1. From the record of the Capital Campaign, select the Solicitors tab. For information about how to open a campaign record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



**Note:** Team members report to the team, to other members of their team, or to themselves. Team members cannot report to members of other teams.

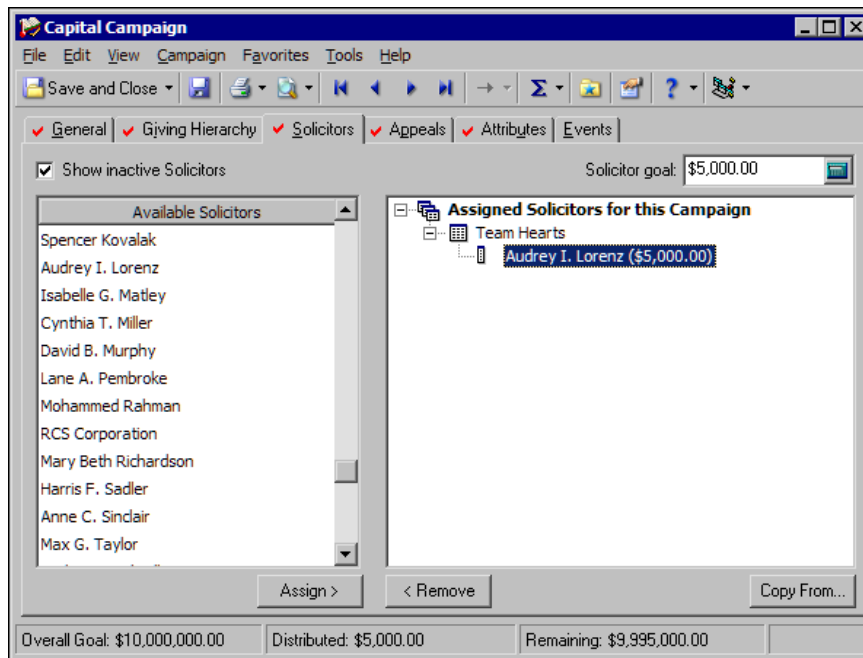
2. In the **Available Solicitors** box, select “<New Team>” and click **Assign**. “New Team” appears in the **Assigned Solicitors for this Campaign** box.



3. In the hierarchy, delete the name “New Team” and enter “Team Hearts”.
4. In the **Available Solicitors** box, select Audrey Lorenz and click **Assign**. Audrey moves over into the hierarchy, under Team Hearts.

**Note:** The overall goal amount appears at the bottom of the Solicitors tab. A panel at the bottom of this screen also displays the goal amount for the solicitor or team selected in the hierarchy. Additional panels display the amount of the overall goal that has been distributed and the amount that remains to be distributed.

5. Select Audrey's name in the hierarchy and, in the **Solicitor goal** field, enter the amount \$5000.



6. Follow steps 4 and 5 to enter the solicitors "Joseph Diresta" and "Cynthia Miller" as members of Team Hearts. Enter a goal amount of \$5,000 for each solicitor. When you assign each solicitor, make sure Team Hearts is selected so both report to Team Hearts. The totals in the Distributed and Remaining panels at the bottom of the Solicitors tab change.
7. On the toolbar, click **Save and Close**.

► **Add a solicitor to a team from the solicitor’s constituent record**

Once you create a solicitor team for a goal for a campaign, a fund, or an appeal, you can add a solicitor to the team from the solicitor’s constituent record.

**Scenario:** You want to add the solicitor, Mohammed Rahman, to the Endowment Campaign Team with a goal amount of \$5,000. From his constituent record, enter Mohammed as a member of this solicitor team.

1. From Mohammed Rahman’s constituent record, select the Bio 1 tab. For information about how to open records, see “Access Constituent Records” on page 4.

**Mohammed Rahman**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events  
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

**Biographical**

Last name: Rahman Aliases  
 First name: Mohammed  
 Middle name:  
 Titles: Mr.  
 Suffixes:  
 Nickname:  
 Maiden name:  
 ID: 68  
 Gender: Male SSN: 288-88-6464  
 Birth date: 10/09/1968 Age: 39  
 Deceased? Date:  
 Marital status: Married  
 Spouse: Sejal Rahman  
 Solicit code:

**Preferred Address - Business**

Country: United States More...  
 Address lines: 12 Broad Street  
 City: Dayton  
 State: OH Ohio  
 ZIP: 45406 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Business	937-458-9696	Shared

This constituent  
 Is inactive  Is a solicitor Details  
 Gives anonymously  Has no valid addresses  
 Requests no email

Alumnus (06/11/1995 - )

Education Business Bank

- Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

Type of Goal	Goal Amount	Campaign/Fund/Category	Reports To
Campaign	\$100,000.00	Disaster Relief Campaign	
Campaign	\$30,000.00	Capital Campaign	Joseph P. Diresta

- On the Goals tab, click **New Goal** on the action bar. The Goal screen appears.

- In the **Type of goal** frame, select **Campaign**.

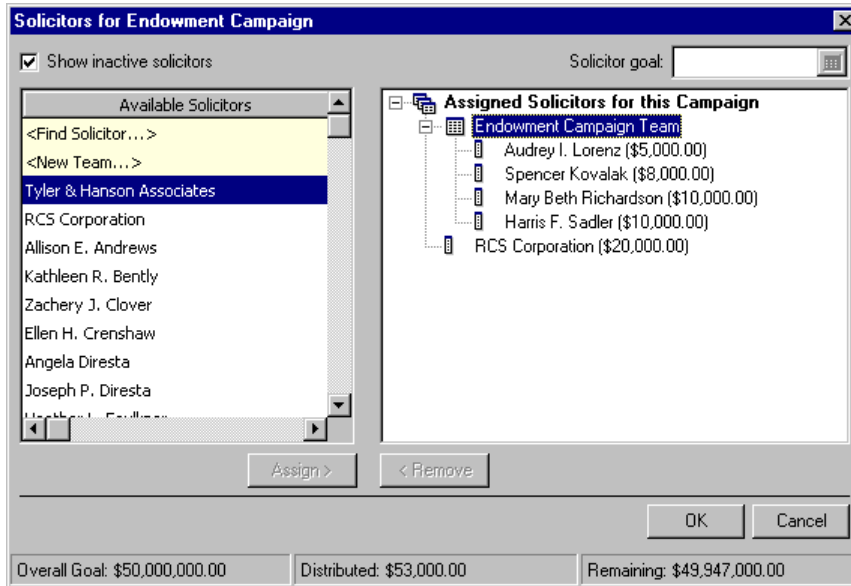
**Note:** The amount entered in the **Goal Amount** field is the solicitors’s goal amount for the type of goal selected, not the overall goal amount.

- In the **Campaign** field, select “Endowment Campaign”.
- In the **Goal Amount** field, enter the goal amount of \$5,000.

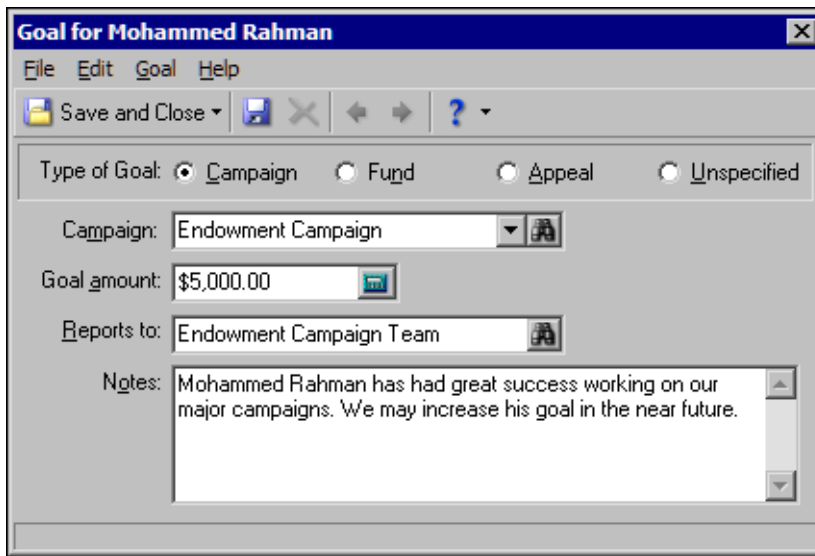
**Note:** You can select a solicitor or team included in the solicitor hierarchy as the **Reports to** entry. If a team is selected, the team name and the name of the team captain appear in the **Reports to** field. You do not have to enter a solicitor or team in the **Reports to** field.



- In the **Reports to** field, click the binoculars. The Solicitors screen appears.



- In the **Assigned Solicitors for this Campaign** hierarchy, select **Endowment Campaign Team**.
- Click **OK**. You return to the New Goal screen.
- In the **Notes** box, enter “Mohammed Rahman has had great success working on our major campaigns. We may increase his goal in the near future.”



- On the toolbar, click **Save and Close**. You return to the Solicitor Information screen. In the grid, Mohammed’s campaign goal for the Endowment Campaign appears.
- Click **OK**. You return to the Bio 1 tab of Mohammed’s constituent record.
- On the toolbar, click **Save and Close**.

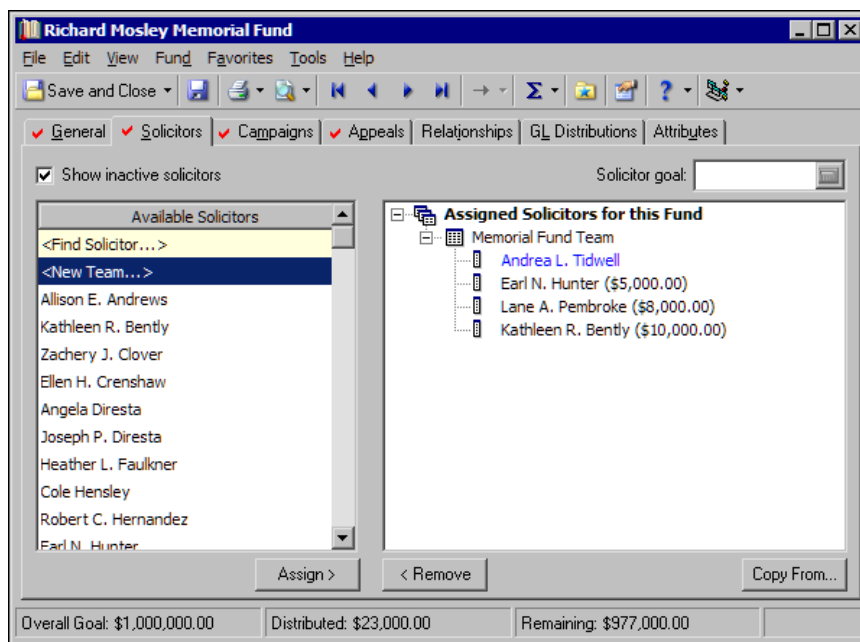
► **Delete a solicitor team**

**Note:** A red check mark on the Solicitors tab indicates the tab contains solicitor information.

You can delete a solicitor team for a goal for a campaign, a fund, or an appeal from the record of the campaign, fund, or appeal.

**Scenario:** Most of the solicitors for your Richard Mosely Memorial Fund are inactive. You decide to delete the team so you can reorganize and reassign new members.

1. From the record of the Richard Mosely Memorial Fund, select the Solicitors tab. For information about how to open a fund record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. In the **Assigned Solicitors for this Fund** box, select **Memorial Fund Team**.
3. Click **Remove**. A message appears to ask whether to remove the team.
4. Click **Yes**. A message appears to ask whether to delete the members of the solicitor team.

**Note:** To delete only the team and not the members, click **No**. The solicitor team members remain in the solicitor hierarchy for the goal, but they no longer report to a team. Members of the team who report to other members continue to report to these solicitors.

5. Click **Yes**. The program removes the Memorial Fund Team from the hierarchy and from the Goals tab of each solicitor's constituent record.
6. On the toolbar, click **Save and Close**.

## Assign a Team Captain

**Note:** A team captain primarily keeps both the team members and the organization informed of a project's progress; encourages and offers advice to team members; and coordinates the team's fundraising efforts.

You can assign a captain to each solicitor team. The captain is the primary contact for the team and usually organizes the team's efforts. While the team captain can have a solicitor goal, a solicitor goal is not required. A team captain may be strictly devoted to the organization, encouragement, and direction of the team. Once you create a solicitor team for a goal for a campaign, a fund, or an appeal, you can assign a captain to the team from the record of the campaign, fund, or appeal.

► **Assign a team captain**

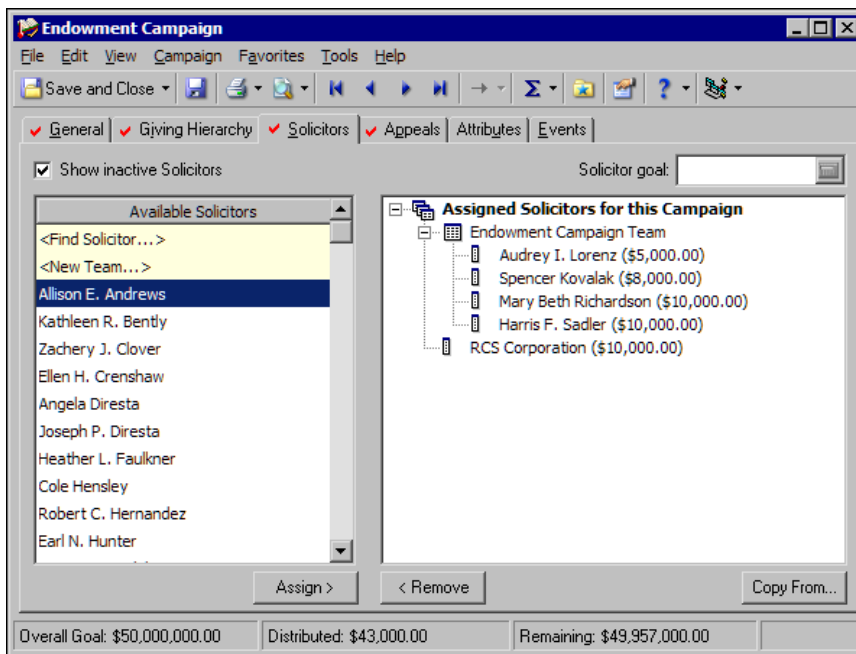
**Note:** A red check mark on the Solicitors tab indicates the tab contains solicitor information.

Once you establish teams for a fundraising goal, you can designate a captain for each team.

**Scenario:** The members of the Endowment Campaign Team request that you assign a captain to their team. Cole Hensley has experience as a team captain and knows the members of this team. Make Cole the captain for the Endowment Campaign Team.

**Scenario:**

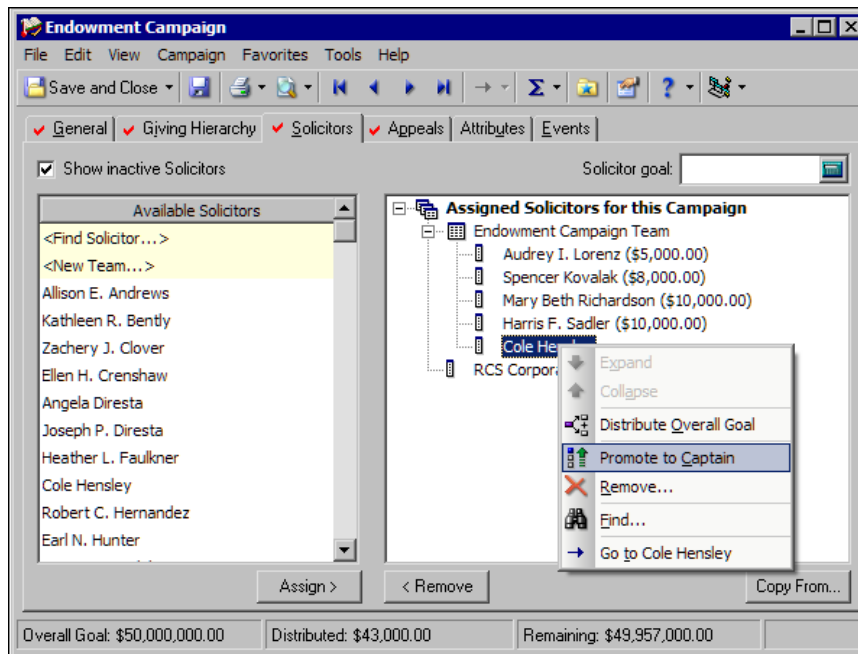
1. From the record of the Endowment Campaign, select the Solicitors tab. For information about how to open a campaign record, see the *Campaigns, Funds, & Appeals Data Entry Guide*.



2. In the hierarchy, select “Endowment Campaign Team”.
3. In the **Available Solicitors** box, select “Cole Hensley” and click **Assign**. Cole appears in the solicitor hierarchy of the “Endowment Campaign Team”.

**Note:** You can demote a captain the exact same way you promoted him. In the **Assigned Solicitors** box, select the captain’s name, right-click, and select **Demote Captain**.

4. In the solicitor hierarchy, select Cole Hensley's name, right-click, and select **Promote to Captain**.



Cole's name appears at the top of the team hierarchy in the **Assigned Solicitors to this Campaign** box. The name also appears in blue. Cole is promoted to captain of the Endowment Campaign Team.

5. On the toolbar, click **Save and Close**.

## View a Team Captain Assignment

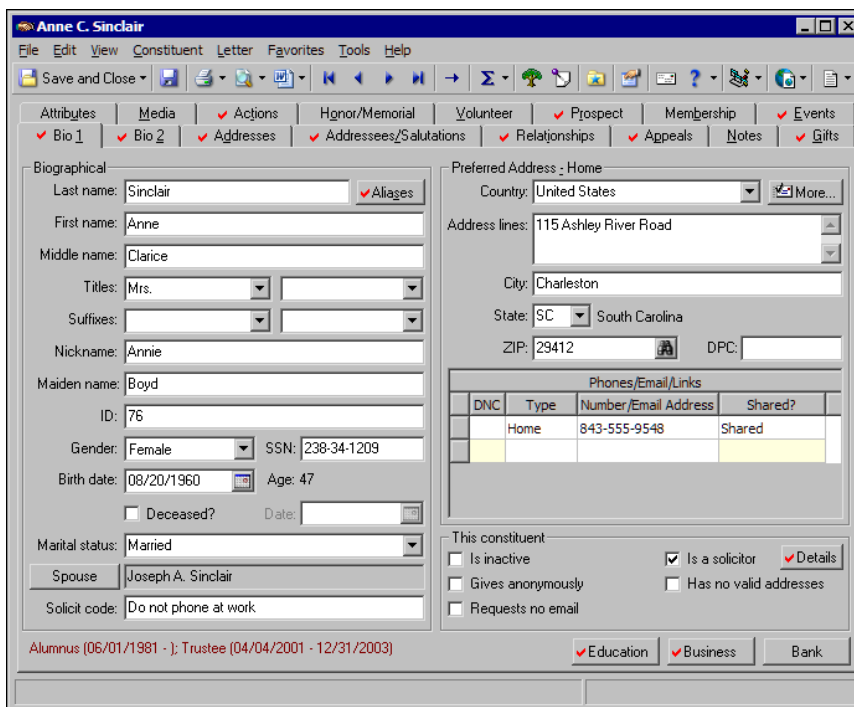
The purpose of a captain assignment for each team is to have a primary contact for the team and to make sure someone is responsible for the organization of the team's efforts. The team captain may be devoted to the organization, encouragement, and direction of the team, and may or may not have a solicitor goal. You are not required to have a captain for each solicitor team.

► **View a team captain assignment**

If a solicitor is the captain of a solicitor team, you can view the captain assignment information from the solicitor's constituent record.

**Scenario:** Anne Sinclair is one of your most successful solicitors. You want to make Anne the captain of one of the Capital Campaign solicitor teams. Anne has been a team captain in the past, and you are not sure if she is currently the captain of other solicitor teams. Before you create a team captain assignment for Anne, look to see whether she is the captain of any other solicitor teams.

1. From Anne Sinclair's constituent record, select the Bio 1 tab. For information about how to open records, see "Access Constituent Records" on page 4.



**Biographical**

Last name: Sinclair  Aliases

First name: Anne

Middle name: Clarice

Titles: Mrs.

Suffixes:

Nickname: Annie

Maiden name: Boyd

ID: 76

Gender: Female SSN: 238-34-1209

Birth date: 08/20/1960 Age: 47

Deceased? Date:

Marital status: Married

Spouse: Joseph A. Sinclair

Solicit code: Do not phone at work

**Preferred Address: Home**

Country: United States

Address lines: 115 Ashley River Road

City: Charleston

State: SC South Carolina

ZIP: 29412 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	843-555-9548	Shared

**This constituent**

Is inactive  Is a solicitor  Details

Gives anonymously  Has no valid addresses

Requests no email

Alumna (06/01/1981 - ); Trustee (04/04/2001 - 12/31/2003)

Education  Business  Bank

- Click **Details** beside the **Is a solicitor** checkbox. The Solicitor Information screen appears.

Type of Goal	Goal Amount	Campaign/Fund/Category	Reports To
Fund		2008 Annual Fund	Team A (Anne C. Sinclair)
Fund		Annabelle Johnson Endow...	Team A (Anne C. Sinclair)
Campaign		Membership Campaign	Team 1 (Anne C. Sinclair)

- On the Goals tab, click **Team Captain Assignments**. The Team Captain Assignments for Campaign, Fund and Appeal Goals screen appears.

Campaign/Fund	Overall Goal	Team	Team Goal
Membership Campaign	\$1,000,000.00	Team 1	\$50,000.00
2001 Annual Fund	\$200,000.00	Team A	\$25,000.00
Annabelle Johnson Endow...	\$500,000.00	Team A	\$20,000.00

- In the grid, view the team captain assignments for Anne.
- Click **Close**. You return to the Solicitor Information screen.
- Click **OK**. You return to the Bio 1 tab of Anne's constituent record.
- On the toolbar, click **Save and Close**.



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