# Constituents Guide

05/27/2021Blackbaud CRM 4.0 Constituents US



Constituents-2017

# Contents

# Constituents Configuration

Before you can manage your constituent information, you must first configure options available to use with constituents. From *Constituents*, you can access tasks required to configure these options under **Configuration**.

# Constituencies

A constituency defines the affiliation a constituent has with your organization. From the Constituencies page, you can view and manage the available constituencies. To access the Constituencies page from *Constituents*, click **Constituencies** under **Configuration**.

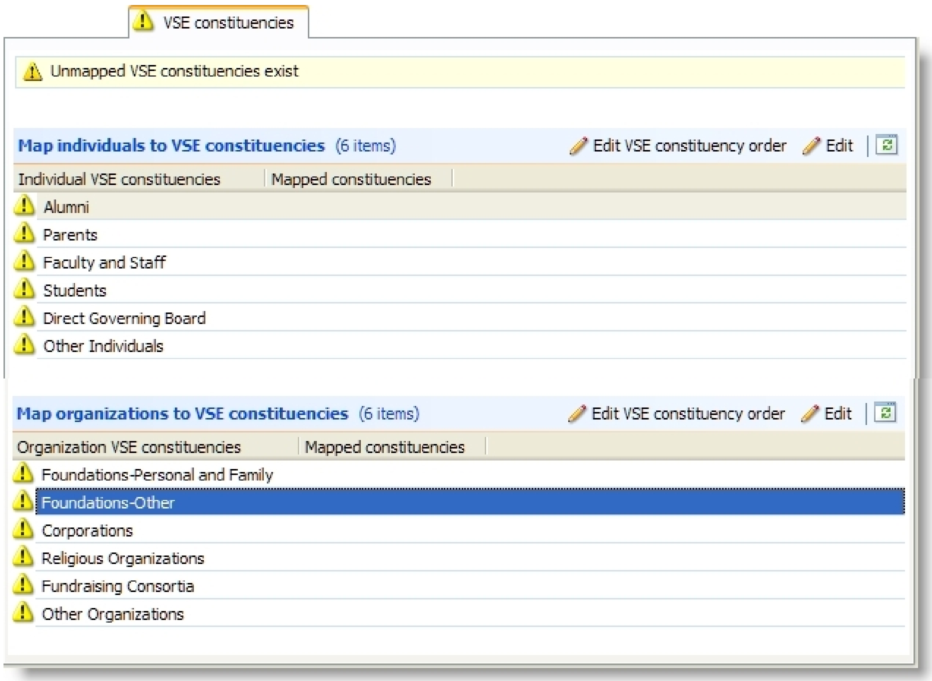
***Note:*** Donor constituencies, such as Major Donor, are automatically added to constituent records based on the level of donor giving. Revenue reporting filters help determine what types of revenue are considered when calculating donor constituencies. For example, when you specify pledge donations as a revenue reporting filter, pledge donations are considered when calculating donor constituencies. For more information about revenue reporting filters, refer to Revenue Filters.

On the Constituencies tab, you can view and manage your donor constituency criteria and configure your other constituencies.

Under **Constituencies**, you can change the order constituencies appear on reports and record summaries. For example, to display the Board member constituency before the Volunteer constituency, you can move Board members above Volunteer in the list of constituencies. For information about how to change the constituency order, see Edit Constituency Order on page 22.

You can also edit the display name of a constituency. For example, if your organization uses the term "docent" instead of "volunteer," you can change the Volunteer constituency to display Docent. When you change the display name, the original program or user-defined name appears in the **Constituency** column. For information about how to edit the display name, see Edit Constituency Display Name on page 21.

From the VSE constituencies tab, colleges, universities, and private secondary schools can map individual and organization constituencies to the constituencies of the Voluntary Support of Education (VSE) Survey. To determine how the VSE Survey Report handles revenue from constituents with multiple constituencies, your organization can also sort the VSE constituencies in order of importance. The program uses these constituencies to generate the VSE Survey Report.




For information about the VSE Survey Report, see the *Fundraising Purposes Guide*.

# Constituency Types

There are several default constituency types which the program may automatically add to a constituent. However, you can also manually add many constituencies to a constituent under Constituencies on the Personal Info tab. Constituencies also appear under **Active constituencies** in the summary of a constituent record and are sometimes a link to additional information about the constituent.

***Note:*** To add user defined constituency types, from *Administration*, click **Code tables**. Under the **Biographical** category, click **Constituency** under **Code table name** column. The Manage Code Table Entries page appears where you can manage your constituency types.

| Constituency | Description |
|---|---|
| **Alumnus** | If you are an educational organization, you designate an educational institution as affiliated in *Administration*. Then, when you select a status of "Graduated" for a constituent, this constituency appears under **Active constituencies** on the constituent record. |
| **Bank** | The "Bank" constituency is automatically added to any organization constituent you have set up as a bank in **Manage bank accounts** or **Bank search** in *Treasury*. You cannot manually add this constituency, but you can manually delete this constituency if it no longer applies or was added by mistake. |
| **Board member** | Under Constituencies on the Personal Info tab, you can add this constituency to a constituent and enter start and end dates. When you add the constituency, it appears under **Active constituencies** on the constituent record.<br><br>When the end date of the board membership occurs in the past, the constituent no longer has this constituency. |
| **Committee** | When you add a committee, you actually add a group with this constituency type. Committee groups have all of the group functionality, but can optionally also be event coordinators and solicitors. On the group page for a committee, you can manage the basics for the group, such as group membership. On the Committee page for the group, you can view and manage details about the committee. |
| **Committee member** | When you add a constituent to a committee, the constituent is assigned this constituency. When the end date of the committee membership occurs in the past, the constituent no longer has this constituency. |
| **Donor** | The criteria for the Donor constituency is established by the **Constituencies** task under **Configuration** in *Constituents*. The constituency appears on a constituent when the constituent meets the criteria established. When a donor no longer meets the criteria, the constituency is removed from the record.<br><br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Event registrant** | When a constituent is registered for an event, the constituent receives the event registrant constituency. |
| **Fundraiser** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a fundraiser in *Prospects*, the program automatically adds this constituency to the constituent record. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Grantor** | The "Grantor" constituency is automatically added to any constituent you have set up as a grantor in *Foundations*. You cannot manually add this constituency to a record, but you can manually delete this constituency if it no longer applies or was added by mistake. |

| Constituency | Description |
|---|---|
| **Loyal donor** | A constituent receives the "Loyal donor" constituency when the constituent meets the **Loyal donor definition** criteria set up in the **Constituencies** configuration task in *Constituents*. When a donor no longer meets the criteria, the constituency is removed from the record.<br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Major donor** | A constituent receives the "Major donor" constituency when the constituent meets the **Major donor definition** criteria set up in the **Constituencies** configuration task in *Constituents*. When a donor no longer meets the criteria, the constituency is removed from the record.<br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Major giving prospect** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a prospect in *Prospects*, the program automatically adds this constituency to the constituent record. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Matching gift organization** | The "Matching gift organization" constituency is automatically added to organization records who are identified as matching gift organizations through the MatchFinder Online service which can be configured in *Revenue*. You cannot manually add this constituency to a record, but you can manually delete this constituency if it no longer applies or was added by mistake. |
| **Member** | When you add an active membership to a constituent, the program automatically adds this constituency to the constituent. You can also manually add this constituency to a constituent and enter start and end dates.<br>When the membership expires, the constituent no longer has this constituency. |
| **Planned giver** | When you add a constituent as a major giving prospect in *Prospects*, you can then add planned gifts for the constituent. When a planned gift is marked as accepted or matured and has a designation and designation amount, the program automatically adds this constituency to the constituent record. |

| Constituency | Description |
|---|---|
| **Recognized donor** | When you include a constituent in a recognition program, the program automatically adds this constituency to the constituent record when you run the recognition process. |
| **Relation only** | When you add the constituent as a relationship of another constituent and there is no other constituency assigned, the program automatically adds this constituency to the constituent record.<br>When another constituency is added to the constituent, either manually or by the program, the "Relation only" constituency is removed. |
| **Sponsor** | When you add a constituent as a sponsor in *Sponsorship*, the program automatically adds this constituency to the constituent record. When the sponsorship is no longer active, the constituency is automatically removed from the constituent. |
| **Sponsorship donor** | When you add a constituent as a sponsor in *Sponsorship* and the sponsor is making a gift of sponsorship, the program automatically adds this constituency to the constituent record. |
| **Sponsorship recipient** | When a constituent makes a gift of sponsorship in *Sponsorship*, the program automatically adds this constituency to the gift recipient's constituent record. |
| **Staff** | You can add this constituency to a constituent and enter start and end dates. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Student** | If you are an educational organization, you designate an educational institution as affiliated in *Administration*. When you select a status of "Currently attending" or "Incomplete" on the primary education history record of an individual constituent, this constituency appears on the constituent record. |
| **Vendor** | When you add a constituent as a vendor and associate the vendor with event expenses, the program automatically adds this constituency to the constituent record. |
| **Volunteer** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a volunteer in *Volunteers*, the program automatically adds this constituency to the constituent record.<br>When the end date occurs in the past, the constituency is automatically removed from the constituent record. |

# Edit the Donor Constituencies Criteria

When a constituent first makes a donation, the program automatically applies a constituency of Donor to the constituent. You can configure the constituency of Donor to apply only to constituents who donate within a specified period of time, such as of a certain date or within a certain number of years. This time frame determines who your organization considers to be a donor.

You can also define the criteria used to define a donor as a Loyal donor or a Major donor. You can configure the constituency of Loyal donor to apply only to constituents who donate within a specified period of time, such as a certain number of consecutive years. You can configure the constituency of Major donor based on a constituent's total lifetime giving or largest donation. You can also select whether to consider recognition credits in the totals for the donor constituencies.

Your settings here ensure the program uses the Donor, Loyal donor, and Major donor constituencies consistently, such as in constituent records and selections.

### Edit the Donor constituency criteria

1. From *Constituents*, click **Constituencies** under Configuration. The Constituency page appears.
2. To determine what payments to include in constituency calculations, under **Donor constituency criteria**, click **Edit**. On the Edit donor constituency criteria screen, select whether to include the recognition credits of a constituent in the totals for the constituency definitions and click **Save**.
3. To determine the criteria for individual constituencies, expand the constituency you want to edit and click **Edit constituency criteria**. You can edit criteria for the Donor, Loyal donor, and Major donor constituencies.
4. For each type of constituency, make criteria selections.
    - For donors, you can either use a specific number of years, or a date since the constituent has given. To apply a constituency of Donor to a constituent who has donated within a number of recent years, select **Constituent has given in recent years**. In the **Years** field, enter the number of years to the current date within which the constituent must have donated. For example, to include all constituents who donated within the past three years, enter 3. To apply a constituency of Donor to a constituent who has donated since a specific date, select **Constituent has given since a specific date**. In the **Date** field, select the date after which a constituent must have last donated to have a constituency of Donor.
    - For loyal donors, enter how many consecutive months or years to the date the donors must give before you consider them to be a loyal donor.
    - For major donors, you can indicate a minimum lifetime giving amount and/or a minimum single donation. If you configure minimum amounts for both lifetime giving and largest donation criteria, the program assigns the Major donor constituency to a donor who meets either criteria. The program does not require a donor meet both minimum amounts to have a constituency of Major donor. To apply the constituency based on the lifetime giving of a constituent, select **Has lifetime giving greater than or equal to**. In the field, enter the minimum total lifetime giving a constituent must donate to have a constituency of Major donor. To apply the constituency based on the largest donation of a constituent, select **Has a largest donation greater than or equal to**. In the field, enter the minimum amount of a largest donation a constituent must donate to have a constituency of Major donor.

# Edit Constituency Display Name

From the Constituencies tab on the Constituencies page, you can edit the display name of a constituency. For example, if your organization uses the term “docent” instead of “volunteer,” you can change the Volunteer constituency to display Docent.

Under **Constituencies**, select the constituency with the display name to change and click **Edit**. The Edit constituency display name screen appears. Edit the display name and click **Save**. You return to the Constituencies page.

# Edit Constituency Order

You can change the order constituencies display on reports and record summaries based on what is important to your organization.

### Edit constituency order

1. From **Constituents**, under **Configuration**, click **Constituencies**. The Constituencies page appears.
2. Select the Constituencies tab.
3. Under **Constituencies**, click **Edit constituency order**. The Edit constituency order screen appears.
4. Select the constituencies to move and click the up or down arrows to move them to the desired position. The constituency at the top of the list appears first on reports and record summaries, followed in order by the constituencies below it.
5. After you make the changes, click **Save**. You return to the Constituencies page.

# Mark Constituencies as Inactive

When you no longer use a constituency, it is best to mark it as inactive. Inactive constituencies cannot be applied to constituents, and they do not appear as filters in queries or reports. If you inactivate a constituency that had previously been assigned to a constituent, the summary section of the constituent's record no longer shows that constituency. Inactivating constituencies you do not use reduces the likelihood of data-entry mistakes and improves system performance.

You mark constituencies as active or inactive from the Constituencies page. From *Constituents*, click **Constituencies** under **Configuration**. On this page, active constituencies show a checkmark on the Active column. To mark a constituency as inactive, select the row and click **Mark inactive**.

Once you inactivate a constituency, you can reactivate it at any time. When you reactivate a constituency, any constituents who had previously been identified with that constituency will show it as active. To reactivate a constituency, on the Constituencies page select the constituency and click **Mark active**.

# Change VSE Type to College or Secondary School

On the Constituencies page, colleges, universities, and private secondary schools can map individual and organization constituencies to the constituencies of the Voluntary Support of Education (VSE) Survey. The program uses these mapped constituencies to generate the VSE Survey Report. Before you map constituencies in your database to the VSE constituencies, you must verify the VSE constituencies that appear on the Constituencies page are applicable to your institution. You can easily change the VSE constituencies that appear to those of a secondary school or of a college, as applicable.

### Change the VSE type on the Constituencies page to a college or secondary school

1. From *Constituents*, click **Constituencies** under **Configuration**. The Constituencies page appears.
2. To display the VSE constituencies for a college or university, click **Change VSE type to college** under **Tasks**.

   To display the VSE constituencies for a secondary school, click **Change VSE type to secondary school** under **Tasks**.

   A message appears to confirm the change.
3. Click **Yes**. You return to the Constituencies page. The applicable VSE constituencies appear.

# Map Constituencies to VSE Categories

Colleges, universities, and private secondary schools can map individual and organization constituencies to the constituencies of the Voluntary Support of Education (VSE) Survey. The program uses these mapped constituencies to generate the VSE Survey Report. If you do not map all VSE constituencies to constituencies in your database, a message appears at the top of the Constituencies page to inform you that unmapped constituencies exist.

### Map constituencies to VSE categories

1. From *Constituents*, click **Constituencies** under **Configuration**. The Constituencies page appears.
2. Select the VSE constituencies tab.
3. Select whether to display the VSE constituencies for a college or secondary school. For information about how to select which VSE constituencies appear on the Constituencies page, see Change VSE Type to College or Secondary School on page 22.

> ***Warning:*** You must select whether to display the VSE constituencies for a college or secondary school *before* you map your constituencies. If you change the VSE constituencies displayed after you map your constituencies, you lose any information about mapped constituencies.

4. Select the VSE constituency to map to an individual or organization constituency in your database.
   - To map individual constituencies to a VSE constituency, select the VSE constituency in the **Individual VSE constituencies** column of the **Map individuals to VSE constituencies** grid.
   - To map organization constituencies to a VSE constituency, select the VSE constituency in the **Organization VSE constituencies** column of the **Map organizations to VSE constituencies** grid.
5. On the action bar, click **Edit**. The Map Constituencies to VSE Categories screen appears.
6. Under **Constituency**, select the constituency to map to the VSE constituency. You can map multiple individual or organization constituencies to a VSE constituency.
7. Click **Save**. You return to the Constituencies page. In the grid, the mapped constituencies appear in the **Mapped Constituencies** column for the VSE constituency.

# Edit the Sort Order of VSE Constituencies

To determine how the VSE Survey Report handles revenue from constituents with multiple constituencies, colleges, universities, and secondary schools can sort the VSE constituencies in order of importance. The hierarchy of the VSE constituencies determines to which VSE constituency the VSE Survey Report associates a donation from a constituent with multiple constituencies. For example, Fran Margaret is both an alumnus and a current parent at your institution. If you rank a VSE constituency of Alumni higher than Current Parents, the VSE Survey Report includes donations from Fran in the revenue associated with the VSE constituency of Alumni.

### Sort the hierarchy of the VSE constituencies

1. From *Constituents*, click **Constituencies** under **Configuration**. The Constituencies page appears.
2. Select the VSE constituencies tab.
3. Verify all VSE constituencies are mapped to individual and organization constituencies in your database.

> ***Note:*** If a VSE constituency is not mapped, "Unmapped VSE constituencies exist" appears at the top of the Constituencies page. For information about how to map VSE constituencies to constituencies in your database, see Map Constituencies to VSE Categories on page 23.

4. Select the VSE constituencies to sort.
   - To sort the individual VSE constituencies, select a constituency in the **Individual VSE Constituencies** column of the **Map Individuals to VSE Constituencies** grid.
   - To sort the organization VSE constituencies, select a constituency in the **Organization VSE Constituencies** column of the **Map Organizations to VSE Constituencies** grid.
5. On the action bar, click **Edit VSE constituency order**. The Edit VSE Constituency Order screen appears.
6. Under **Description**, select the constituency to sort in the hierarchy. For example, to adjust the importance of the Students constituency, select "Students".
7. Adjust the position of the selected constituency.
   - To decrease the ranking of the selected constituency, click the down arrow at the top of the screen.
   - To increase the ranking of the selected constituency, click the up arrow at the top of the screen.
8. Click **Save**. You return to the Constituencies page.

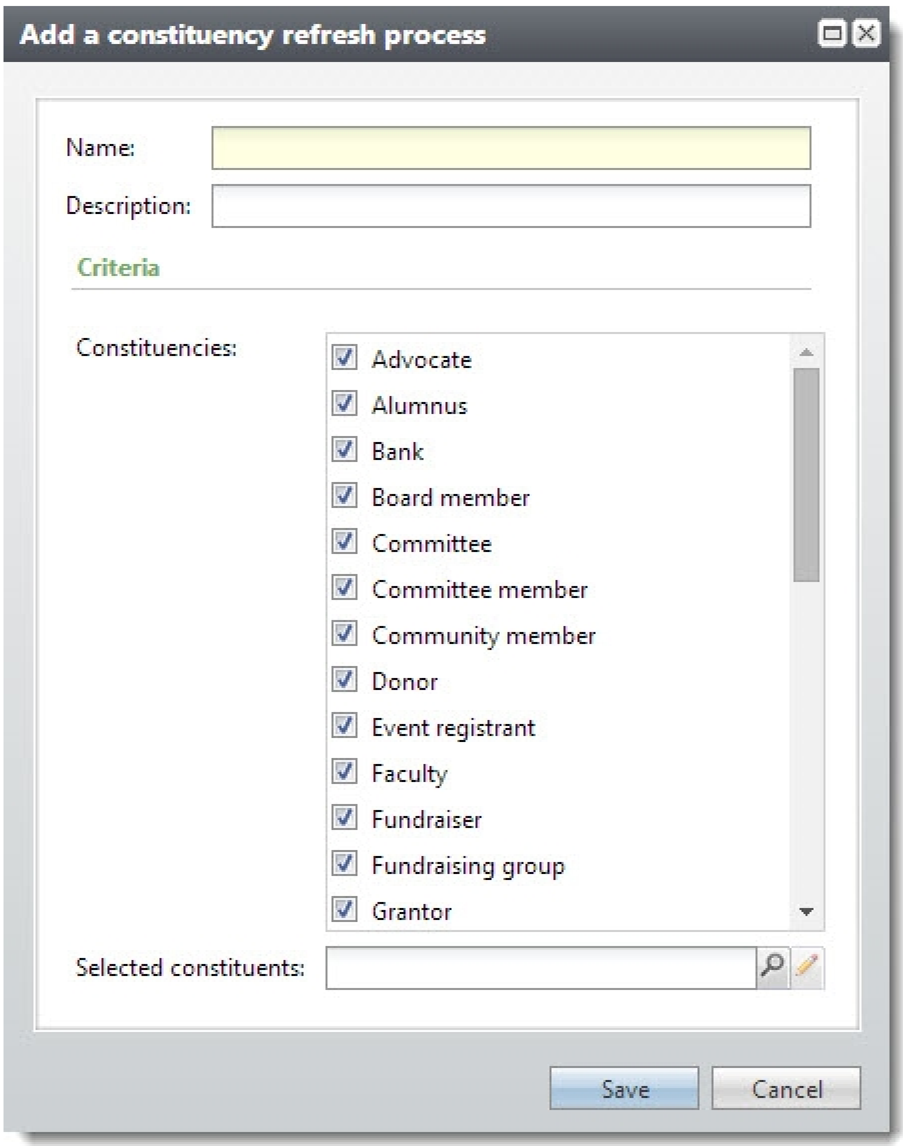
# Constituency Stored-Value Refresh Process

To help improve performance with querying on constituency information, we have added the ability to create and run a Constituency Stored-Value Refresh Process. The process recalculates the constituencies across your database. You must run the Constituency Refresh process in order to update the values. We recommend that you queue this process to run regularly, such as once a day. When you run the process, all records are updated with any constituency changes, and any reactivated constituencies that were previously marked as inactive appear on the appropriate records.

You can still query on constituencies, but you can also query based on the stored values of constituencies.

## Add Constituency Refresh Process

1. From *Constituents*, click **Constituency refresh process** under **Maintenance**. The Constituency Refresh Processes screen appears.
2. Click **Add**. The Add a constituency refresh process screen appears.

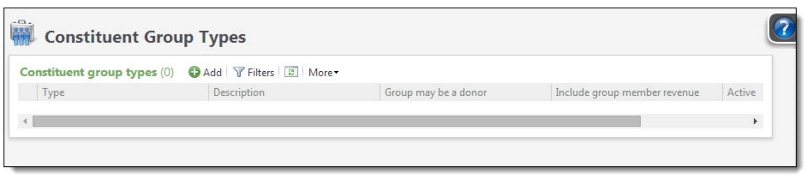



3. Enter a name and a description for the process.

4. Under **Criteria**, select the constituencies you want to include in the refresh process. All constituencies, both default and user-defined, are selected by default.
5. To apply the refresh process to a specific group of records, enter a selection in the **Selected constituents** field. When you leave this field empty, the process refreshes all records on your database.
6. Click **Save**. To run the process, select the process on the Constituency Refresh Processes screen and click **Start process**.

# Constituent Group Types

Before you add a constituent group record to the database, you must define the types of constituent groups used at your organization, such as giving circles and family foundations. To view or manage your constituent group types from *Constituents*, click **Constituent group types** under **Configuration**. The Constituent Group Types page appears.




Under **Constituent group types**, your constituent group types appear. For each type, you can view its description, whether the group may be a donor, whether to include gifts from members as revenue from the group, and whether the group type is active. To display inactive group types, click **Filter**, select **Include inactive** and click **Apply**.

From the grid, you can add and manage your organization’s constituent group types.

# Add Constituent Group Types

Before you add a constituent group record to the database, you must define its group type, such as giving circle or family foundation.

### Add a constituent group type

1. From *Constituents*, click **Constituent group types** under **Configuration**. The Constituent Group Types page appears.
2. Under **Constituent group types**, click **Add**. The Add a constituent group type screen appears.
3. Enter a unique name and a description to help identify the group type.
4. Select whether groups of this type can be donors and whether to include charitable revenue received from the group’s members in the overall giving summary of the group. If you select **Include member giving in group giving summaries**, the program includes the revenue received from the members of the group in the giving views and total giving amount of the group.
5. Click **Save**. You return to the Constituent Group Types page.

## Delete Constituent Group Types

After you add a constituent group type, you can delete it as necessary, such as when your organization no longer uses it. You cannot delete a group type when it is assigned to a constituent group.

***Tip:*** To retain a history of the constituent group type in your database but still prevent its use, mark the group type as inactive rather than delete the record. For information about how to mark a constituent group type as inactive, see Mark Constituent Group Types as Inactive or Active on page 27.

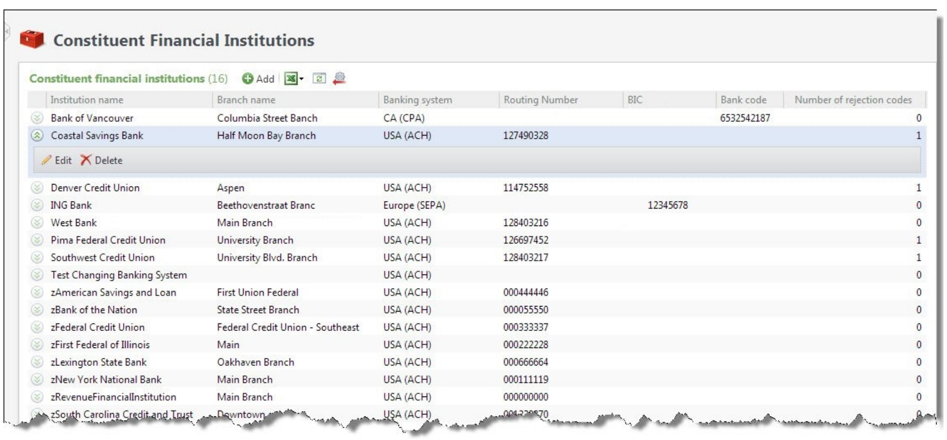
## Mark Constituent Group Types as Inactive or Active

To retain information about a constituent group type that your organization no longer uses, you can make the group type inactive in the database.

After you mark a constituent as inactive, you can mark the constituent as active again if necessary.

# Constituent Financial Institutions

In *Constituents*, you can store information about the financial institutions your constituents use. You manage this information on the Constituent Financial Institutions page. To access the Constituent Financial Institutions page from *Constituents*, click **Constituent financial institutions** under **Configuration**.




Under **Constituent financial Institutions**, you can view financial institutions in the database. For each institution, you can view its name, branch name, and routing number, or BIC. You enter this information when you add the financial institution to the database. To update the information that appears in the grid, click **Refresh** on the action bar.

***Note:*** Depending on the banking systems enabled for your organization, additional columns that represent banking system and routing number or BIC information may display on this page. You can enable or disable banking systems for your organization from the **Banking systems** link in *Treasury*.

Depending on your security rights and system role, you can manage the financial institutions from the action bar.

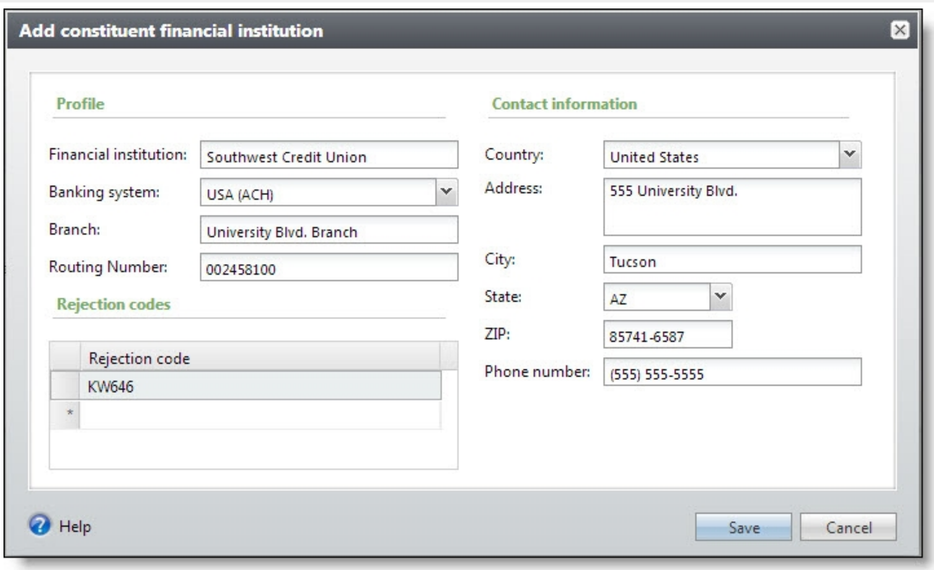
***Note:*** You set up your organization's bank accounts from the Manage Bank Accounts page in *Treasury*. After you set up a bank account, you can select a specific bank account to process your organization's financial transactions, such as transactions included in a direct debit transmission file. For information about how to manage bank accounts, see the *Treasury Guide*.

# Add Constituent Financial Institutions

## Add a constituent financial institution

1. From *Constituents*, click **Constituent financial institutions** under **Configuration**. The Constituent Financial Institutions page appears.
2. Under **Constituent financial institutions**, click **Add** on the action bar. The Add constituent financial institution screen appears. For information about the items on this screen, see Add Constituent Financial Institution Screen on page 29.

***Note:*** To add a financial institution from the Financial Institution Search screen, click **Add** on the action bar of the **Results** grid.




3. In the **Financial institution** field, enter the name of the financial institution.
4. In the **Banking system** field, select the banking system to associate with the financial institution.

***Note:*** Banking systems can only be enabled or disabled through the **Banking systems** link on the Treasury page.

5. To further identify the financial institution, enter its branch and routing number information.

***Note:*** Routing number and BIC fields can display differently depending on the banking system you select. For example, if **Europe (SEPA)** is an enabled banking system, and you select it in the **Banking system** field on this screen, the **BIC** field appears.

6. Under **Rejection codes**, enter the rejection codes associated with the routing number or BIC.

***Note:*** When you process direct debit transactions, you receive a return file from your financial institution that includes result codes for any rejected transactions. When you commit the Direct Debit Return batch, the program attempts to match a result code to a rejection code to verify that the financial institution rejected the transaction. For more information about the Direct Debit Return batch, see the *Batch and Import Guide*.

7. Under **Contact information**, enter address and phone number information about the branch.
8. Click **Save**. You return to the Constituent Financial Institutions page. In the grid, the new financial institution appears.

# Add Constituent Financial Institution Screen

The table below explains the items on the Add constituent financial institution screen. For information about how to access this screen, see Add Constituent Financial Institutions on page 28.

| Screen Item | Description |
|---|---|
| **Financial institution** | Enter the name of the financial institution. |
| **Banking system** | Select the banking system to associate with the financial institution.<br>Banking systems can only be enabled or disabled through the **Banking systems** link on the Treasury page. |
| **Branch** | As financial institutions often have multiple branches, enter a name to identify this branch of the institution, such as Downtown or Baker Street. |
| **Routing number, Sort code, BIC, or Bank code** | Enter the routing number, sort code, BIC, or bank code used to identify the financial institution.<br>Routing number, sort code, BIC, and bank code fields can display differently depending on the banking system you select. For example, if **Europe (SEPA)** is an enabled banking system, and you select it in the **Banking system** field on this screen, the **BIC** field appears. |
| **Rejection code** | Enter the rejection codes associated with the routing number. The program uses this information to determine whether the financial institution rejects a direct debit transaction. |
| **Contact information** | Enter the address and telephone number information for the financial institution. |

# Edit a Constituent Financial Institution

On the Constituent Financial Institutions page, you can edit information about a financial institution used by a constituent. For example, you can change the name of the financial institution to reflect a bank merger.

***Warning:*** The **Banking system** field cannot be edited when the constituent financial institution is linked to a constituent account.

### Edit a constituent financial institution

1. From *Constituents*, click **Constituent financial institutions** under **Configuration**. The Constituent Financial Institutions page appears.
2. Under **Constituent Financial Institutions**, click the institution you want to edit.
3. On the action bar, click **Edit**. The Edit constituent financial institution screen appears. The items on this screen are the same as the Add constituent financial institution screen. For information about the items on this screen, see Add Constituent Financial Institution Screen on page 29.
4. Edit the information as necessary.

   ***Warning:*** The **Banking system** field cannot be edited when the constituent financial institution is linked to a constituent account.
5. Click **Save**. You return to the Constituent Financial Institutions page.

# Giving Level Programs

Giving level programs enable you to build loyalty among your constituents. For example, a constituent may receive a specific benefit or recognition for a minimum threshold donation. One giving level program may cover your entire organization, or you can establish different giving level programs for specific divisions within an organization. For example, a development office may run a organization-wide giving level program and the membership office may also run their own giving level program. To view and manage the giving level programs your organization uses, from *Constituents*, click **Giving level programs** under **Configuration**. The Giving Level Programs page appears.

In the grid, you can view the name, description, and number of levels of each program. You can also view the smart field used to calculate the revenue for each program.

To view a Giving Level Program report for a program, select it in the grid and click **View Report** on the action bar. With this report, you can view which constituents are members of each level of a giving level program. For information about this report, see Giving Level Program Report on page 312.

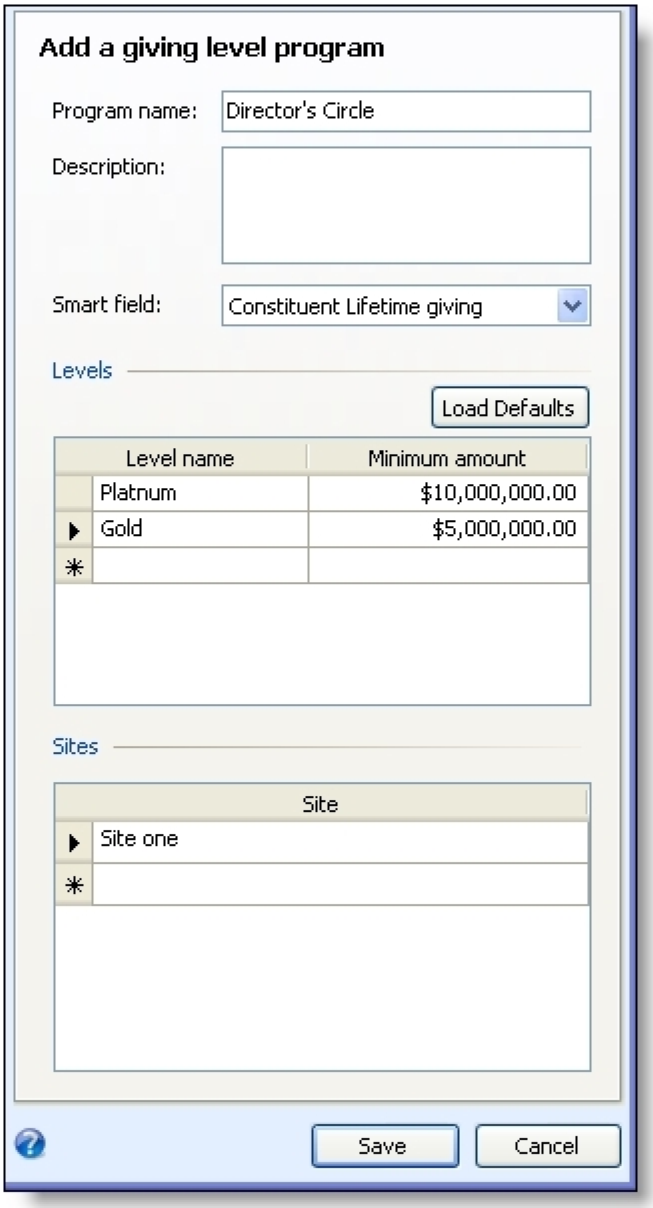
From the grid, you can also add and manage your giving level programs.

## Add Giving Level Programs

To build loyalty among your constituents, you can add a giving level program. One giving level program may cover your entire organization, or you can add different giving level programs for specific divisions within an organization

### Add a giving level program

1. From *Constituents*, click **Giving level programs** under **Configuration**. The Giving Level Programs page appears.
2. Click **Add**. The Add a giving level program screen appears.




3. Enter a unique name and description to help identify the giving level program.
4. In the **Smart field** field, select the smart field with the result set of revenue to consider as giving revenue to include in the program.
5. Under **Levels**, enter the name and minimum donation amount for each level of the program.

If the selected smart field contains value groups, click **Load Defaults** to base the levels of the program on the value groups of the smart field.

6. In the **Site** grid, you can restrict the new program to specific sites used by your organization. If no site is selected, than all sites have access to the new program; if you select sites, only sites included in the grid have access to the new program.
7. Click **Save**. You return to the Giving Level Programs page. In the grid, the new giving level program appears.

# First Name and Gender Defaults

The program includes thousands of first names with default gender assignments in place. To view and manage the first name gender defaults, such as to add a name or change a gender assignment, from *Constituents*, click **First names** under **Configuration**.

### Add a first name and default gender

1. From *Constituents*, click **First names** under **Configuration**. The First Names page appears.
2. Under **First names**, click **Add**. The Add a first name screen appears.
3. Enter the first name for which you want to assign a gender default.
4. In the **Gender** field, select the gender to assign by default when a user enters the name.
5. Click **Save**. You return to the First Names page.

# Household Settings

You can configure settings for constituent households on the Household Settings page. To access the Household Settings page from *Constituents*, click **Household settings** under **Configuration**.


Under **Default household name format options**, you can view the default name format options set for constituent households. When your organization communicates with a household, the program uses these defaults to create addressees and salutations for the household.

Under **Household revenue options**, you can view whether constituent households can donate to your organization. If you allow households to donate, you can process revenue from households just as you do for individuals and organizations. If not, you can process revenue from household members but not from the household. If you do not allow households to be donors, they can still receive recognition credits.

# Default Household Name Format Options

To ease communication with your constituent households, you can set up the default name format option to use with households. The name format option determines the addressees and salutations used in your communications with constituent households.

***Note:*** For a specific constituent household, you can override the default household name format options. For information about how to set the name format for a specific household, see Add Name Formats for a Constituent on page 102.

## Edit the default name format options for constituent households

1. From *Constituents*, click **Household settings** under **Configuration**. The Household Settings page appears.
2. Under **Default household name format options**, click **Edit** on the action bar. The Edit default household recognition options screen appears.
3. Select the name format option to use as default when your organization communicates with constituent households.
4. Click **Save**. You return to the Manage Household Settings page.

# Household Revenue Options

Before you add households to your database, you should decide whether to allow households to donate to your organization. For example, your organization may create constituent households for communication or analysis purposes but prefer to associate revenue transactions with household members rather than the household itself.

## Edit the revenue options for constituent households

1. From *Constituents*, click **Household settings** under **Configuration**. The Manage Household Settings page appears.
2. Under **Household revenue options**, click **Edit**. The Edit household revenue options screen appears.
3. Select whether constituent households can be donors.
   - To allow households to donate, select **Yes**. If you select this option, your organization can process revenue transactions from households just as you do for individuals and organizations.
   - To not allow households to donate, select **No**. If you select this option, your organization cannot process revenue transactions from households but can still apply recognition credits to households. For example, if a household member donates to your organization, you can recognize the household with a recognition credit.
4. Click **Save**. You return to the Manage Household Settings page.

# Life Changes

It may be beneficial for your organization to set standard operating policies around how to reflect changes to a constituent's record after they are marked as deceased or get married. For example, to save money on mailings, you may consider policies to automatically change a deceased constituent's solicit code to "Do not mail" and automatically update contact information for constituents when they marry.

On the Manage Life Changes page, you can configure the program to automatically update specific constituent information after you mark a constituent as deceased or update a constituent's spousal relationship. To access the Manage Life Changes page from *Constituents*, click **Life changes** under **Configuration**.

***Note:*** If system configuration options are not set for deceasing or for marriage, the Deceasing Options page or Marriage Options page does not appear.

To help you manage these configuration options, the Manage Life Changes page contains multiple tabs.

## Deceasing Options

From the Deceasing tab on the Manage Life Changes page, you can configure the program to update specific constituent information automatically after you mark a constituent as deceased. You can also configure the program to display a Deceasing Options page so users can update a constituent's relationships, constituencies, and other information after they mark a constituent as deceased.

### Manage Global Rules for Deceased Constituents

When you configure global rules for deceased constituents, the program automatically applies these settings when a user or the *DeceasedRecordFinder* service marks a constituent as deceased. For example, after you mark a constituent as deceased, the program can automatically mark the constituent as inactive so they do not appear in searches.

#### Set global rules for deceased constituents

1. From *Constituents*, click **Life changes** under **Configuration**. The Manage Life Changes page appears.
2. Select the Deceasing tab.
3. Under **Global rules for deceased constituents**, click **Edit** on the action bar. The Edit global rules for deceased constituents screen appears. For information about items on this screen, see Edit Global Rules for Deceased Constituents Screen on page 35.


4. Select the options to automatically apply when a user marks a constituent as deceased.
5. Click **Save**. You return to the Manage Life Changes page.

   When a user or the *DeceasedRecordFinder* service marks a constituent as deceased, the program automatically makes the changes specified to the constituent record.

## Edit Global Rules for Deceased Constituents Screen

The table below explains the items on the Edit global rules for deceased constituents screen.

| Screen Item | Description |
|---|---|
| **Add solicit code to deceased** | To automatically add a new solicit code to record of a constituent marked as deceased, select this checkbox and select the solicit code to apply, such as Do not mail. |
| **If financial accounts exist, change EFT status** | To automatically change the electronic funds transfer (EFT) status of the financial accounts for a deceased constituent, select this checkbox and select the status to apply, such as Inactive. |
| **Disable wealth updates for prospects marked deceased** | To disable the Update prospect *WealthPoint* data process for constituents marked as deceased, select this checkbox. When you select this checkbox, the Update prospect *WealthPoint* data process no longer updates the record of a deceased prospect, even when included in a selection of constituents on which a *WealthPoint* update is executed.<br>For more information, see the *Prospects Guide*.<br>For more information, see the Prospects section of the help file. |

| Screen Item | Description |
| --- | --- |
| **Set record status to inactive for the deceased** | To mark a deceased as constituent as inactive, such as to not include the constituent in search results, select this checkbox. To search for an inactive constituent, you must select **Include inactive** on the Search screen. |
| **No longer give recognition credit for gifts given by the spouse** | To not apply recognition credits to a deceased constituent for gifts received from the deceased constituent's spouse, such as to keep recognition credits accurate, select his checkbox. When you select this checkbox, you do not affect existing recognition credit. |
| **If spouse exists, change marital status** | To automatically update the marital status of the spouse of a constituent marked as deceased, select this checkbox and select the marital status to apply, such as Widowed. |

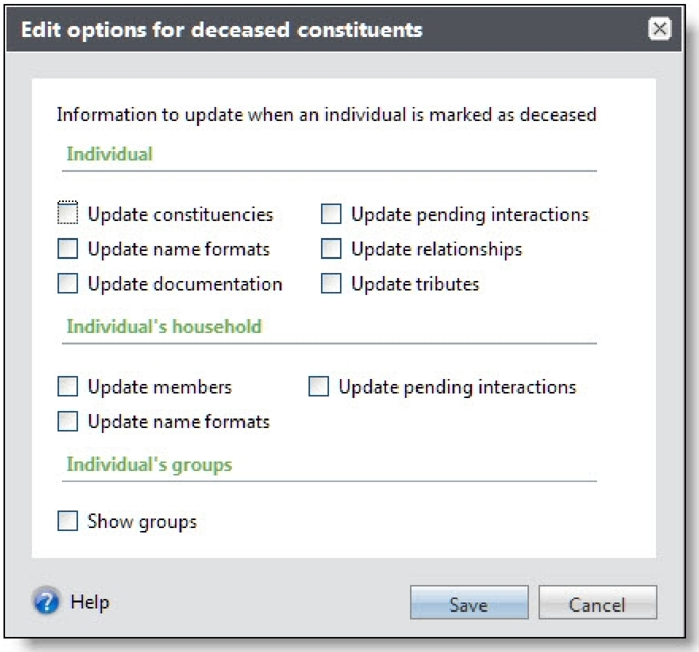
# Manage Options for Deceased Constituents

When you configure deceasing options, you determine which information appears on the Deceasing Options page that appears when a user or the *DeceasedRecordFinder* service marks a constituent as deceased so users can adjust information as necessary. For example, from the Deceasing Options page, users can determine whether to delete pending interactions for a deceased constituent or assign them to another constituent.

***Note:*** When a user marks a constituent as deceased, the program automatically asks the user to evaluate and update the constituent information selected. If the options for deceased constituents are not configured, the Deceasing Options page does not appear.

## Set options for deceased constituents

1. From *Constituents*, click **Life changes** under **Configuration**. The Manage Life Changes page appears.
2. Select the Deceasing tab.
3. Under **Options for deceased constituents**, click **Edit** on the action bar. The Edit options for deceased constituents screen appears. For information about items on this screen, see Edit Options for Deceased Constituents Screen on page 38.




4. Select the information users can manage when a constituent is marked as deceased.
5. Click **Save**. You return to the Manage Life Changes page.

## Deceasing Options Page

Depending on the options your system administrator configures in *Constituents*, the Deceasing Options page appears when you mark a constituent as deceased. On this page, you can review the constituent record and update the constituent's relationships, constituencies, and other information as necessary. To access the Deceasing Options page from a constituent record, click **Go to deceasing options** on the action bar under **Deceased information** on the Personal tab.

***Note:*** In *Constituents*, your system administrator selects the information that appears on the Deceasing Options page. If no information is selected by your system administrator, the Deceasing Options page does not appear.

After you confirm the accuracy of the information on the Deceasing Options page, you can mark the information as reviewed.

You can manage constituent information that appears on the tabs on the Deceasing Options page.

### Constituencies Tab

On the Constituencies tab, all affiliations the deceased constituent has with your organization appear. You can update this information as necessary. For example, if the deceased constituent was a board member for your organization, you can remove that constituency. If the constituent has a spouse or is part of a household, grids appear to display the constituencies of the spouse and household.

### Relationships Tab

On the Relationships tab, all of the people with whom the deceased constituent is associated appear. You can update this information as necessary. For example, you can change the marital status of the spouse of a deceased constituent or add an individual as the executor of the constituent. Constituents can have individual, organization, and household relationships.

**Interactions Tab**

On the Interactions tab, all specific communication activities and actions between your organization and the constituent appear. You can update this information as necessary. These can include meetings, telephone calls, email messages, and mailings. For example, if the deceased constituent has a pending telephone call interaction with your organization, you can remove it from their record.

**Personal Information tab**

On the Personal information tab, all name formats used for the constituent appear. You can update this information as necessary. For example, if the deceased constituent's spouse has a name format of "Mr. and Mrs. Michael Jones," you can remove the deceased constituent's name from the salutation. If the constituent has a spouse or is part of a household, grids appear to display the name formats of the spouse and household.

**Documentation Tab**

On the Documentation tab, all notes, media links, and attachments for the constituent appear. You can update this information as necessary. For example, to include the deceased constituent's obituary in their constituent record, you can attach a media link. Summary information for the selected documentation appears.

**Tributes Tab**

On the Tributes tab, all tributes associated with the constituent appear. With tributes, you recognize a donation to your organization in relation or tribute to someone else. For example, after a constituent is marked as deceased, you can create a tribute "In memory of..." to recognize the deceased constituent.

**Household/Groups Tab**

On the Household/Groups tab, all members of the constituent's household appear under **Current household members**. You can update this information as necessary. For example, you can set the deceased constituent's spouse as the primary household contact. If the constituent is a member of a constituent group, the groups appear under **Current group memberships**.

To access the record of the group, click its name in the grid.

## Edit Options for Deceased Constituents Screen

The table below explains the items on the Edit options for deceased constituents screen.

| Screen Item | Description |
|---|---|
| **Individual** | Select the information about an individual constituent, such as constituencies or relationships, that users can manage after the constituent is marked as deceased. |

| Screen Item | Description |
|---|---|
| **Individual's household** | Select the information about an individual constituent's household, such as members and name formats, that users can manage when the individual is marked as deceased. |
| **Individual's groups** | Select whether to display the groups associated with an individual constituent on the Deceasing Options page when you mark the individual as deceased. When you select **Show groups**, users can manage information about the deceased constituent's group membership, such as to determine whether the membership in each group is still appropriate. |

# Marriage Options

With marriage options, you can specify what happens when your constituents marry. For example, you can set a global rule to automatically change the marital status of the constituents. You can determine the options to display on the Marriage Options page that appears when a user adds a spouse for a constituent. You can also specify new familial relationships to automatically create for married constituents, such as "step-" and "-in-law" relationships.

## Edit Global Rules for Married Constituents

When you configure global rules for married constituents, the program automatically applies these settings when a user adds a spouse to a constituent. For example, you can configure the program to automatically change the marital status of a constituent to Married when a user adds a spousal relationship.

### Edit global rules for married constituents

1. From *Constituents*, click **Life changes** under **Configuration**. The Manage Life Changes page appears.
2. Select the Marriage tab.
3. Under **Global rules for married constituents**, click **Edit** . The Edit global rules for married constituents screen appears.
4. Select whether to automatically change the marital status of two constituents when a user marks them as spouses. If you select **Change marital status**, select the status to assign, such as Married.
5. You can also mark whether or not to copy the primary phone number and email address from the constituent to the spouse's constituent record.
6. Click **Save**. You return to the Manage Life Changes page.

## Edit Options for Married Constituents

When you configure marriage options, you determine which information appears on the Marriage Options page that appears when a user adds a spouse for a constituent so users can adjust information as necessary. For example, from the Marriage Options page, users can update contact information and select which address or phone number to use as the primary.

***Note:*** When a user adds a spouse for a constituent, the program automatically asks the user to evaluate and update the constituent information selected. If the options for married constituents are not configured, the Marriage Options page does not appear.

### Set options for married constituents

1. From *Constituents*, click **Manage life changes** under **Configuration**. The Manage Life Changes page appears.
2. Select the Marriage tab.
3. Under **Options for married constituents**, click **Edit** on the action bar. The Edit options for married constituents screen appears.
4. Select the information users can manage when they add a spouse to a constituent.

   When you select **Update contact information**, **Update name formats**, or **Update household information**, a corresponding tab appears on the Marriage Options page that appears after users add a spouse so they can determine which information is correct for the constituent.
5. Click **Save**. You return to the Manage Life Changes page.

## New Individual Relationships to Create for Marriages

Marriages can create new individual relationships, such as "step-" and "-in-law" familial relationships. You can configure the program to automatically create these relationships for a spouse when a user adds a spousal relationship, based on the spouse's gender and the constituent's existing relationships. For example, the program can create a stepparent relationship for a constituent when the spouse has a child.

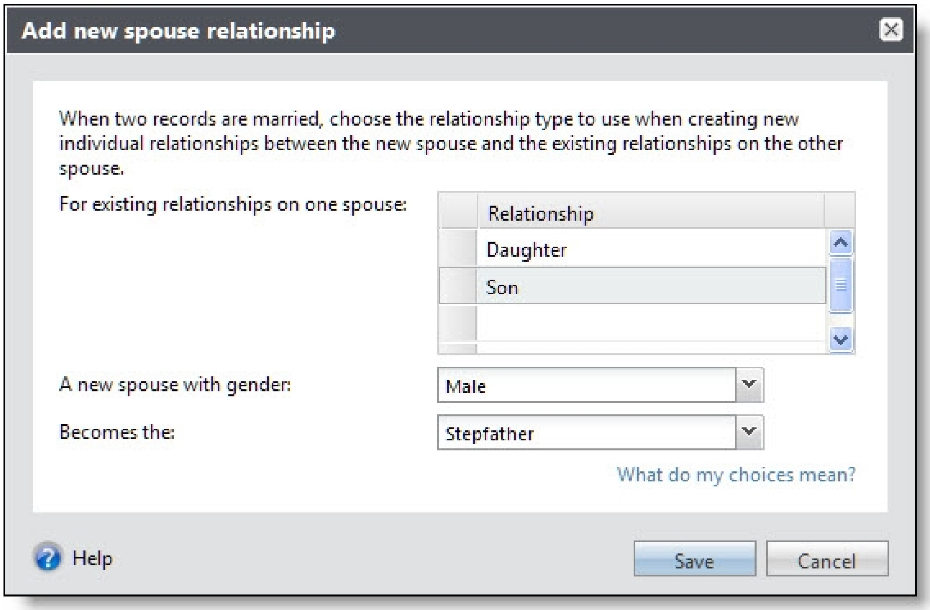
The program may also create reciprocal relationships based the individual relationships it creates for a spouse. For example, if the program creates a Stepfather relationship for a constituent because the spouse has a daughter, the program may also create the reciprocal relationship of Stepdaughter.

***Warning:*** If an existing reciprocal pattern does not exist for a relationship, the program does not automatically create the new relationships. For example, you can configure the program to create a relationship of Stepfather for male constituents when the spouse has a daughter. But if you do not configure a reciprocal relationship for Stepfather, such as Stepdaughter, the program cannot determine the relationship for the daughter and does not create a new relationship between the constituent and the spouse’s daughter. As you configure relationships for married constituents, we recommend you ensure the pattern for a reciprocal relationship exists between two individuals. Otherwise, you can manually enter the first occurrence of the relationship to establish the pattern for future relationships.

### Add new relationships to create for marriages

1. From *Constituents*, click **Life changes** under **Configuration**. The Life Changes page appears.
2. Select the Marriage tab.

3. Under **New individual to create for marriages**, click **Add** on the action bar. The Add new spouse relationship screen appears.




4. In the **For existing relationships on one spouse** grid, select the individual relationships on a constituent for which to create a new relationship for the spouse. For example, to create a relationship of Stepfather, select child relationships such as Son and Daughter.
5. In the **A new spouse with gender** field, select the gender on which to base the new relationship. For example, to create a new relationship applicable to a male spouse, select Male. To create a relationship applicable to either gender, select Any.
6. In the **Becomes the** field, select the relationship type to apply to the spouse based on the selected types of constituent relationships. For example, create Stepfather relationships between the spouse and the constituent's children, select Stepfather.
7. To view a diagram that explains the effect of your selections, click **What do my choices mean?**.
8. Click **Save**. You return to the Manage Life Changes page.

## Add a New Spouse Relationship Screen

The table below explains the items on the Add a new spouse relationship screen.

| Screen Item | Description |
|---|---|
| **For existing relationships on one spouse** | Select the individual relationship types on a constituent for which to create a new relationship on the spouse. For example, to create a relationship of Stepfather, select child relationships such as Son and Daughter. |

| Screen Item | Description |
|---|---|
| **A new spouse with gender** | Select a gender to which the new relationship applies. For example, to create relationship applicable only to a male spouse, select Male. To create a relationship applicable to either gender, select Any. |
| **Becomes the** | Select the relationship type to apply to the spouse based on the selected constituent relationships and gender. For example, to create stepfather relationships between the spouse and the constituent's children, select Stepfather. |
| **What do my choices mean?** | To view a diagram that explains the relationships and reciprocal relationships the program creates because of your selections, click this link. |

# Additional Relationships to Create Among Spouses' Relationships

Marriages can create new individual relationships, such as "step-" and "-in-law" familial relationships. You can configure the program to automatically create these relationships for a constituent when a user adds a spousal relationship, based on the spouse's relationships. For example, the program can create a step-sibling relationship for a constituent's child when the spouse also has a child.

The program may also create reciprocal relationships based the individual relationships it creates for a spouse's relationships. For example, if the program creates a Stepbrother relationship for a constituent's son because the spouse has a daughter, the program may also create the reciprocal relationship of Stepsister.

***Warning:*** If an existing reciprocal pattern does not exist for a relationship, the program does not automatically create the new relationships. For example, you can configure the program to create a relationship of Stepbrother for a constituent's sons when the spouse has a daughter. But if you do not configure a reciprocal relationship for Stepbrother, such as Stepsister, the program cannot determine the relationship for the daughter and does not create a new relationship between the constituent's sons and the spouse's daughter. As you configure relationships for married constituents, we recommend you ensure the pattern for a reciprocal relationship exists between two individuals. Otherwise, you can manually enter the first occurrence of the relationship to establish the pattern for future relationships.

### Add additional relationships to create among spouse's relationships

1. From *Constituents*, click **Life changes** under **Configuration**. The Manage Life Changes page appears.
2. Select the Marriage tab.
3. Under **Additional relationships to create among spouse's relationships**, click **Add** on the action bar. The Add a new additional relationship to create screen appears.


4. In the **If one spouse has a** field, select the type of constituent relationship for which to create the new relationship. For example, to create a new relationship for a constituent's daughters upon a marriage, select Daughter.
5. In the **They become the** field, select the relationship to assign the selected relationship type with respect to the spouse's relationships. For example, to create stepsister relationships between the constituent's daughters and the spouse's children, select Stepsister.
6. In the **For existing relationships on the other spouse** grid, select the types of the spouse's relationships for which to create the new relationship. For example, for step-siblings, select Daughter or Son.
7. Click **Save**. You return to the Manage Life Changes page.

# Origination Settings

You can use constituent origin information to track the source for the constituent record.

If a constituent is added at the same time revenue is added (a new constituent gives a gift, for example) or if a constituent has no source information and revenue is added (an existing constituent with no revenue history gives a gift, for example), a default constituent source code may be assigned which is tied to the revenue. To view or manage the default source code, from *Constituents*, click **Origination settings** under **Configuration**.

To view or edit constituent origin information from a constituent record, click **History** under **More information**. On the Origin tab, click **Edit**. You can edit or select a constituent source. You cannot edit the date the record was added. Origination information also appears in *Query* so you can analyze your data and measure and compare the effectiveness of your constituent sources.

### Assign a default constituent source for revenue

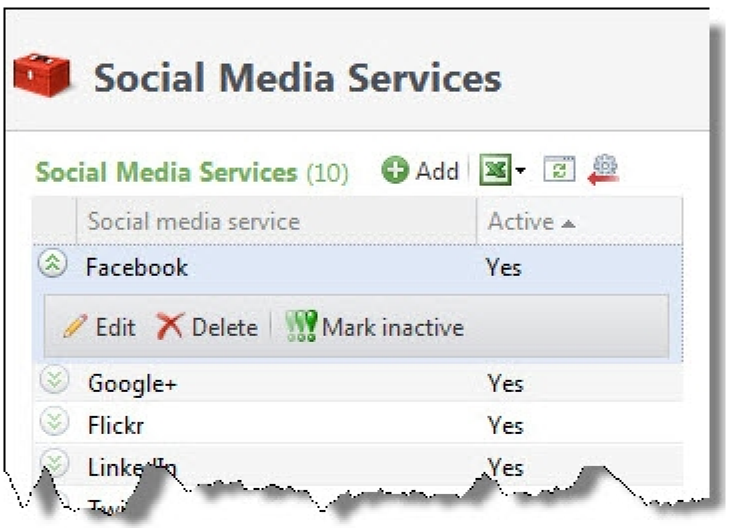
1. From *Constituents*, click **Origination settings** under **Configuration**. The Origination Settings page appears.
2. On the action bar, click **Edit**. The Edit constituent source code for revenue screen appears.

3. Select the default source code to assign to a constituent added at the same time as a revenue transaction or when the constituent has no source code defined at the time revenue is added.
4. Click **Save**. When users add revenue for a constituent with no source defined, the program automatically assigns the default constituent source code for revenue.

# Social Media Services

To build relationships and learn more about your constituents, you can track their accounts for social media services, such as *Flickr* or *Twitter*, and social networking services, such as *Facebook*, *Google+* or *LinkedIn*.

For example, if a volunteer blogs or Tweets, you can link to his social media account, so you can follow his media posts and encourage him to write about his support for your organization. For information about how to manage social media accounts on a constituent's record, see Manage Social Media for a Constituent on page 94.




By default, Blackbaud configures *Facebook*, *Flickr*, *Google+*, *LinkedIn*, *Myspace* and *Twitter* services. As new social media and networking activities become popular, you can add and manage them as necessary to track constituent activity online. To access the Social Media Services page from *Constituents*, click **Social media services** under **Configuration**.

***Tip:*** If you subscribe to Social Media Finder, when a new social media service returns on a wealth screening for a prospect, we automatically add the social media service to the list of services on the Social Media Services page. You do not need to add it manually.

## Add a social media service

When constituents join new social media and social networking services, you can add services to track constituents' accounts and add an account to a constituent's record.

1. From *Constituents*, click **Social media services** under **Configuration**. The Social Media Services page appears.
2. Click **Add**. The Add a social media service screen appears.

3. Enter the name of the social media or social networking service.
4. To include an icon for the service, click **Choose file** and browse to and select an image from your computer.

***Note:*** Icons should be 16 pixels by 16 pixels.

5. Click **Save**. You return to the Social Media Services page. By default, the new service is active.

# Reason Codes

With reason codes, your organization can standardize the reasons users change information and restrict the use of records, such as when they mark a constituent as inactive or write off unpaid pledges. When users make the change, they can select this code to consistently explain the reason for the change. On the Reason Codes page, you can view and manage the reason codes your organization uses. To access the Reason Codes page from *Constituents*, click **Reason codes** under **Configuration**.

For more information about reason codes, see the *Administration Guide*.

# Relationship Settings

On the Relationship Settings page, you can manage your constituent relationship types and configure settings for corporate relationships used for organization constituents.

To access the Relationship Settings page, from *Constituents*, click **Relationship settings** under **Configuration**.

To help you manage your relationship types and settings, the Relationship Settings page contains multiple tabs.

## Relationship Types

On the Relationship Types tab of the Relationship Settings page, you can manage the relationship types used with your constituents. For example, your organization may specify that a relationship type of Brother applies to only the male gender, or that Sister applies only to the female gender. You can also specify the types of constituents the relationship type applies, along with the types of constituents who can have relationships of this type. For example, a relationship type of Employee might apply to only individuals—that is, only individual constituents can be considered as employees.

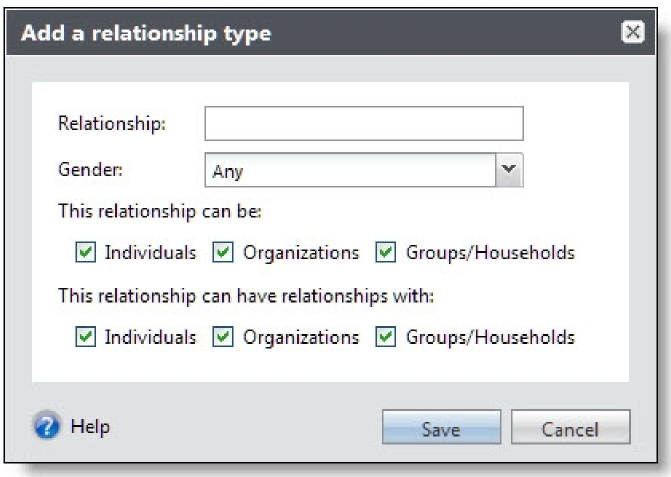
When you add relationships to constituents, you specify the reciprocal relationship. If you add a relationship type of Father to a constituent, the reciprocal relationship might be Son or Daughter. The most common relationship pairs become the default reciprocal relationships. If your organization has more father/daughter pairs than father/son pairs, the default reciprocal relationship when you add a relationship type of Father is Daughter. However, you can still select Son or any other value for the reciprocal relationship.

# Add Relationship Types

From the Relationship Settings page, you can add relationship types. When you add a relationship type, you also select the gender and types of constituents to which it applies.

### Add a relationship type

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Relationship Types tab, click **Add**. The Add a relationship type screen appears.




3. In the **Relationship** field, enter a unique name for the relationship type such as Brother or Employee.
4. Select the gender to which the relationship type applies. If the relationship type applies to either gender, select "Any."
5. Under **This relationship can be**, select the types of constituents who can have a relationship of this type. For example, a relationship type of Employee might apply only to individual constituents, as only individuals are considered employees.
6. Under **This relationship can have relationships with**, select the types of constituents who can have a relationships with constituents of this relationship type. For example, a relationship type of Employee relates to both individuals and organizations, as both may be employers and have employees.
7. Click **Save**. You return to the Relationship Settings page.

# Mark Relationship Types Active or Inactive

Rather than delete an relationship type, you can mark it as inactive. The relationship type remains in your database, but users can no longer apply it to constituent relationships. To mark a relationship type as inactive, select it on the Relationship Types tab on the Relationship Settings page and click **Mark**

**inactive**. To reactivate an inactive relationship type, select it under **Relationship types** and click **Mark active**.

To display inactive relationship types on the Relationship Types page, click **Filter**, select **Include inactive**, and click **Apply**.

## Delete Relationship Types

From the Relationship Settings page, you can delete a relationship type, such as if your organization no longer uses it.

> ***Tip:*** Rather than delete a relationship type, you can mark it as inactive. Inactive relationship types remain in your database, but users cannot apply them to constituent relationships. For information about how to mark a relationship type as inactive, see Mark Relationship Types Active or Inactive on page 46

# Corporate Relationships

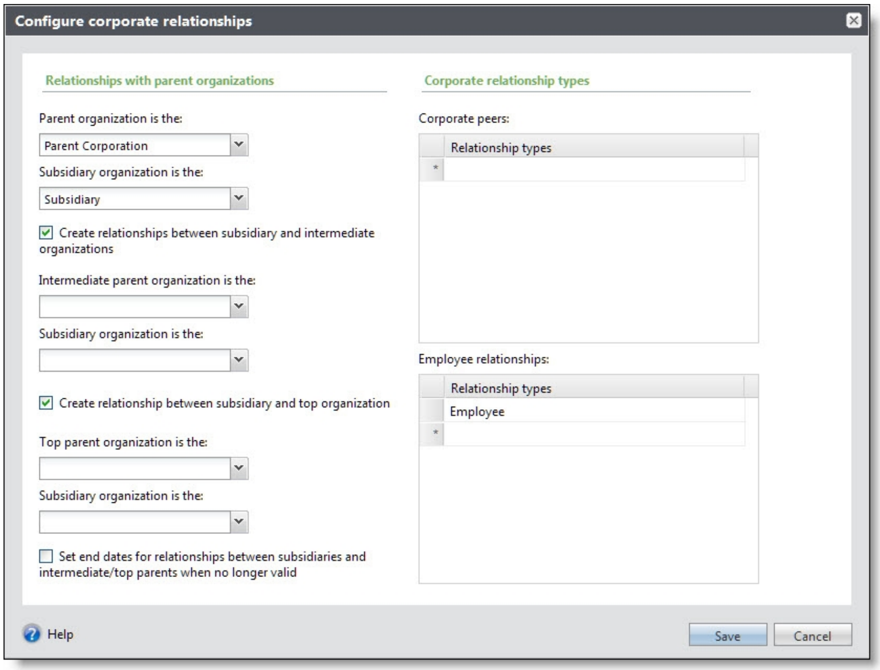
From the Corporate Relationships tab on the Relationship Settings page, you can configure relationships for parent, intermediate, and subsidiary organizations. You can also specify corporate peer and employee relationships.

An organization constituent's employee information appears in corporate summaries for that organization. Corporate summaries include general data, giving history, and employee information for an organization. On the Corporate Information page for an organization constituent, you can view corporate summaries on the Revenue, Employee Giving, and Prospect Plans tabs. You can also view corporate peer organizations on the Corporate Information page.

To ensure that an organization constituent's corporate data accurately includes all employee totals, you must specify the employee relationship types to include in the totals. For example, you can specify that records with relationship types of Employee and Owner count as employees for an organization. When you view corporate summaries, all employees and owners then count as employees and appear in all employee data for the organization.

### Configure corporate relationships

1. From *Constituents*, click **Relationship settings** under **Configuration**. The Relationship Settings page appears.
2. On the Corporate Relationships tab, click **Edit**. The Configure corporate relationships screen appears.




3. In the **Parent organization is the** field, select the default relationship type that the parent organization represents in the relationship, such as Parent Corporation.
4. In the **Subsidiary organization is the** field, select the default relationship type that the subsidiary organization represents in the relationship, such as Subsidiary.
5. Select whether to automatically create relationships between subsidiary organizations and their intermediate parent organizations.
6. If you select **Create relationships between subsidiary and intermediate organizations**, select the relationship types to assign the intermediate parent and subsidiary organizations. The program then creates relationships between the subsidiary organization and all organizations above it.
7. Select whether to automatically create relationships between subsidiary organizations and their top parent organizations.
8. If you select **Create relationship between subsidiary and top organization**, select the relationship types to apply to the top parent and subsidiary organizations. A relationship is then created between the bottom organization and the top organization.
9. Select whether to automatically set end dates when relationships between subsidiary and parent relationships are no longer valid, such as due to dissolution.
10. Under **Corporate peers**, select the relationship types for peer organizations.
11. Corporate peers are other organizations with information to include on the Corporate Information page, such as corporate foundations. Corporate peers also appear on the Extended Network page of the organization.
12. Under **Employee relationships**, select the relationship types for employees. Organization constituents with these relationship types appear in employee data compiled in corporate summaries.
13. Click **Save**. You return to the Relationship Settings page.

## Configure Corporate Relationships Screen

The table below explains the items on the Configure corporate relationships screen. For information about how to access this screen, see Corporate Relationships on page 47.

| Screen Item | Description |
|---|---|
| **Parent organization is the** | Select the default relationship type that the parent organization represents in the relationship, such as Parent Corporation. |
| **Subsidiary organization is the** | Select the default relationship type that the subsidiary organization represents in the relationship, such as Subsidiary. |
| **Create relationships between subsidiary and intermediate organizations** | To automatically create relationships between subsidiary organization and their intermediate parent organizations, select this checkbox and select the relationship types to assign to each. The program then creates relationships between a subsidiary organization and all organizations above it. |
| **Create relationship between subsidiary and top organization** | To automatically create relationships between subsidiary organizations and their top parent organizations, select this checkbox and select the relationship types to assign to each. The program then creates relationships between a subsidiary organization and its top parent organization. |
| **Set end dates for relationships between subsidiaries and intermediate/top parents when no longer valid** | To automatically create end dates when relationships between subsidiary and parent organizations are no longer valid, select this checkbox. |
| **Corporate peers** | Select the relationship types to apply to peer organizations.<br><br>Corporate peers are other organizations whose information you want to include on the Corporate Information page, such as corporate foundations. Corporate peers also appear on the Extended Network page of the organization. |
| **Employee relationships** | Select the relationship types to apply to employees. Organizations constituents with these relationship types appear as employees in corporate summaries. |

# Title Codes and Gender Defaults

You can configure the program to automatically assign genders to constituents based on their titles, such as Mr. and Mrs. On the Title Code Defaults page, you can manage the titles used in your organization and establish the default gender for each. To access this page from *Constituents*, click **Title code defaults** under **Configuration**.

### Add a title code

1. From *Constituents*, click **Title code defaults** under **Configuration**. The Title Code Defaults page appears.

2. Click **Add**. The Add a title code screen appears.
3. Enter the title, such as Mrs. or Governor.
4. In the **Gender** field, select the default gender to assign to the title.
5. Click **Save**. You return to the Title Code Defaults page.

# Constituent Records

After you add a constituent, constituent group, or constituent household to the database, the program automatically creates a record of the constituent. From the record, you can manage information about the constituent, such as contact information, relationships, documentation, and name formats. You can make a constituent inactive and view additional detail information about the constituent. To access the record of a constituent, search the database for the constituent. For information about Constituent Search, see Constituent Search on page 61.

At the top of the record, profile information about the constituent appears in a series of summary tiles. For each constituent type, each user can select which tiles should appear. There is no limit to the number of tiles that can appear. To temporarily minimize all of the tiles on a record, click **Show less**. To expand all the tiles, click **Show more**.

Above the summary tiles, the record type, Lookup ID, deceased status, inactive status, and any active constituencies are always visible. For information about the items that appear on a record for a specific type of constituent, see Individual Constituent Record on page 239, Organization Constituent Record on page 252, Constituent Group Record on page 265, or Constituent Household Record on page 274.

Each application user can configure which tiles are visible for each record type. You can also rearrange tiles to customize the view. To add or remove tiles from the view, click **Customize summary**. The

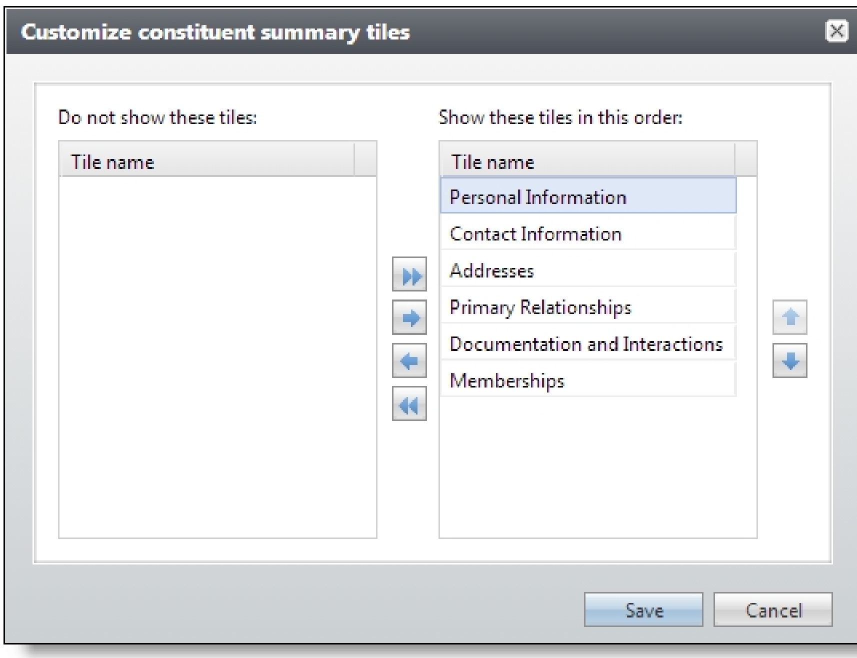
Customize summary tiles screen appears. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

From the record, you can view and manage additional information about the constituent. To help you navigate through this information, the constituent record also contains multiple tabs. Tiles and tabs are linked. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tabs and tiles are automatically updated.

## Customize summary tiles for a constituent record type

To customize the summary of each constituent record type, each application user can select and reorder summary tiles. For information about the summary tiles available for each constituent record type, see Constituent Summary Tiles on page 58.

1. From a constituent record, click **Customize tiles**. The Customize summary tiles screen appears.




2. Select the summary tiles you want to view for all records of this constituent type.

   To include a tile, use the arrows to move the tile name into the **Show tiles in this order** list.

   To exclude a tile, use the arrows to move the tile name into the **Do not show these tiles** list.

3. Under **Show tiles in this order**, you can change the order of the tiles.

   Select a tile and then use the up and down arrows to move the tile into the order you want.

4. Click **Save** to save the tiles and return to the constituent record. All constituent records for this constituent type show the summary tiles you selected.

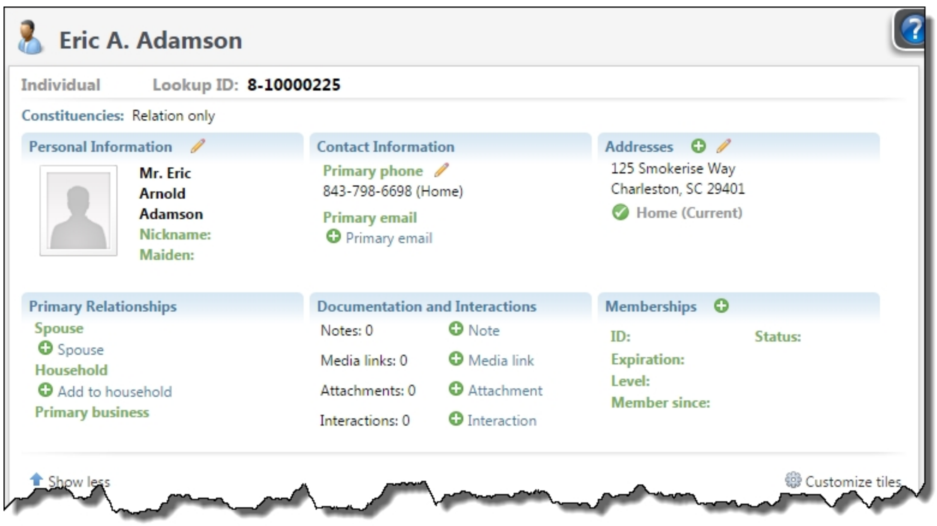
   Tiles respect security settings. If you select to show a tile which includes information that you do not have rights to view, the information does not appear in the tile.

If your screen is not wide enough for all of the tiles to display right to left, the tiles will wrap to appear on additional rows.

To temporarily minimize all of the tiles on a record, click **Show less**. To expand all the tiles, click **Show more**.

# Constituent Summary Tiles

On the constituent record, profile information appears in a series of summary tiles. Under the tiles, the constituent record also contains multiple tabs of additional information. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tabs and tiles are automatically updated.




Each application user can configure which tiles are visible for each record type. Additionally, each user can rearrange the visible tiles to customize the view. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

***Note:*** Users who have security access to the summary section of constituent records can see all tiles. This is true even for tiles that have information about sections of the program that the user may not have access to. For example, if a user has rights to see the constituent summary section but no rights to see membership information, they can still see the Membership tile on constituent records.

| Tile Name | Description |
|---|---|
| **Personal Information** | For individuals, this tile shows the constituent's name, nickname, maiden name, profile image, and whether the individual gives anonymously.<br>For organizations, it shows the constituent's alias, industry, number of employees, number of subsidiaries, and profile image.<br>For groups, it shows the group's alias, description, date created, whether the group gives anonymously, and profile image.<br>For households, it shows the household's description, date created, whether the household gives anonymously, and profile image.<br>To edit this information for a constituent, click the **Edit** icon. You can also update the constituent's profile image.<br>To open the constituent's Info tab, click the tile name. |
| **Contact Information** | If the constituent's record includes a primary phone and email address, the tile shows the information. If not, you can add a primary phone number and email address from this tile. To change this information, click the **Edit** icon.<br>When an organization has multiple contacts, the Contact Information tile displays the primary contact information.<br>Additionally if one or more social media accounts have been added to the record, icons for the first four accounts appear in the tile. To view an social media account, click the icon.<br>To open the Contact Info tab, click the tile name. |
| **Addresses** | This tile shows the constituent's address, address type, and whether the address is marked "Do not contact." To change an address, click the **Edit** icon. You can also add an address from this tile.<br>If a constituent has more than one address, you can click the arrows to view each address. To open the Contact tab, click the tile name. |

| Tile Name | Description |
|---|---|
| **Documentation and Interactions** | This tile shows the number of notes, media links, attachments, and interactions for the constituent. To add a note, media link, attachment or interaction, click an **Add** icon.<br>To open the Documentation and Interactions tab for an individual, group, or organization, click the tile name.<br>To open the Documentation tab for a household, click the tile name. |
| **Memberships** | This tiles shows a constituent's membership information. For all constituents, this includes the membership name, primary member, ID, status, expiration date, level, and when the membership started. If a constituent has more than one membership, you can click the arrows to view each membership. You can also add a membership from this tile.<br>For an individual, if the individual is a member of a household, the tile shows the constituent's memberships and the household's memberships.<br>For a group or household, the tile shows memberships for the group and for each constituent within the group.<br>To open the Memberships tab for the constituent, click the tile name. |
| **Education** | This tile is available for individual constituent records. It shows the education information for the individual. If the consistent does not have any education records, you can add them from this tile.<br>To open the Education tab for the individual constituent, click the tile name. |
| **Primary Relationships** | This tile is available for individual constituent records. It shows the spouse, household, and primary business records related to the individual. To open a related constituent's record, click the name for the related spouse, household, or business. If the consistent does not have a spouse, household, or business listed, you can add one from this tile.<br>To open the Relationships tab for the individual constituent, click the tile name. |
| **Contacts** | This tile is available for organization constituent records. It shows contact information for constituents with relationships to the organization, such as the contact's name, department or title, phone number, email address, and whether the contact is current. You can add and edit contacts from this tile.<br>If an organization has more than one contact, you can click the arrows to view each contact. To open the Relationships tab for the organization, click the tile name. |
| **Group Members** | This tile is available for group constituent records. It shows the primary member, as well as the number of current and former members. To open the primary member's constituent record, click the member's name. To view a list of current or former members, click the related link on the tile.<br>To open the Relationships tab for the group, click the tile name. |

| Tile Name | Description |
|---|---|
| **Household Members** | This tile is available for household constituent records. It shows the primary member, as well as the number of current and former members. To open the primary member's constituent record, click the member's name. To view a list of current or former members, click the related link on the tile.<br><br>To open the Relationships tab for the household, click the tile name. |
| **Opportunities** | This tile displays opportunity information for constituents who are major giving prospects. This information includes the opportunity's plan, the plan's primary manager, the amount of the opportunity, and its status. To edit this information, click the **Edit** icons.<br><br>If a constituent has more than one opportunity, you can click the arrows to view each opportunity. You can also add an opportunity from this tile.<br><br>To open the related record, click the name of the plan, the name of the primary manager, or the opportunity amount.<br><br>To open the Opportunities tab of the plan the Opportunity tile is displaying, click the tile name. |
| **Prospect Status** | This tile summarizes information for major giving prospects. You can view a constituent's prospect information from the tile, including the prospect status and the prospect manager. From the Prospect Status tile, you can also flag the prospect for tracking purposes.<br><br>To edit the prospect's status or prospect manager information, click the **Edit** icons. |

# Constituent Search

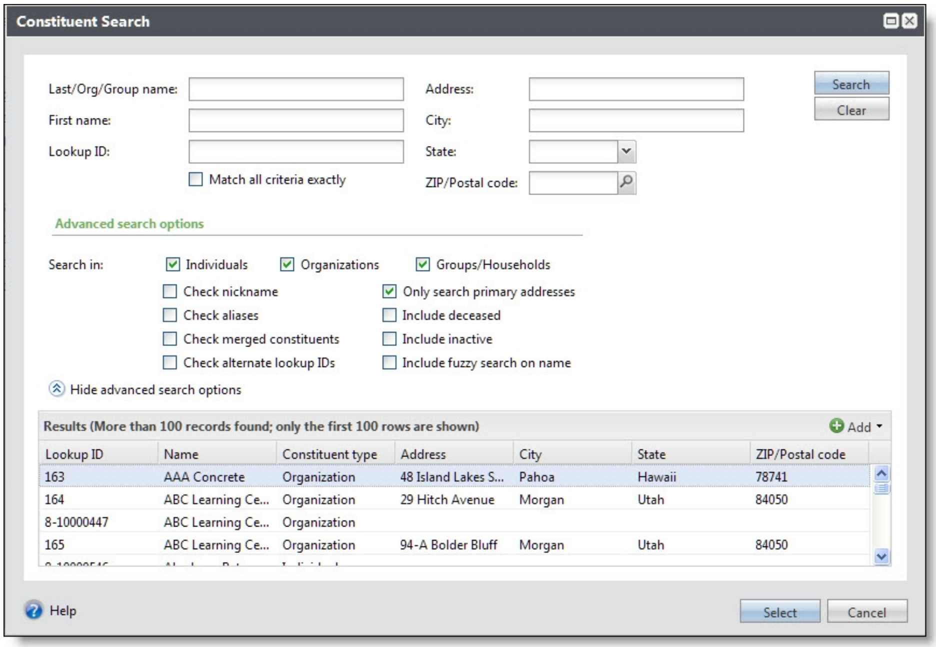
After you add a constituent to the database, you can use the Constituent Search screen to access the constituent’s record.

When you search for a constituent, you can make the search broad or specific, depending on the criteria you select. To get the results you need, we recommend you be selective in your search criteria and use detailed information such as name and address. For more recommendations about your search criteria, see Constituent Search Recommendations on page 64.

***Note:*** To quickly search the entire application, you can also enter the constituent's name or lookup ID in the quick find field at the top of the page.

### Search for a constituent

1. From *Constituents*, click **Constituent search**. The Constituent Search screen appears. For information about the items on this screen, see Constituent Search Screen on page 63.




***Note:*** By default, you search for a constituent by lookup ID or basic name and address information. To use additional criteria such as constituency, email address, or phone number, click **Settings** and configure the settings for the Constituent Search screen. You can also configure the search results to display similar additional information. For information about how to edit the search list settings, see the *Administration Guide*.

2. Enter the search criteria to use, such as name and address information, to find the constituent record. To match the search criteria exactly as entered, select **Match all criteria exactly**.

***Tip:*** If you do not select **Match all criteria exactly**, you can use "wildcard" characters in place of parts of search criteria, such as if you are unsure of an exact spelling. To replace a group of characters, use an asterisk (*) or percent sign (%). To replace a single character, use a question mark (?) or an underscore (_). For example, to return all constituents with a last name that ends with "son" such as Johnson and Williamson, enter "*son" or "%son" as the last name. To find the last name of Smith or Smyth, enter "Sm?th" or "Sm_th".

3. Under **Advanced search options**, select the criteria options to include. For example, select the constituent types to return in the results and select whether to include nicknames and only primary addresses in the search.

   The criteria options you select are sticky. When you close the search and then reopen search later, the same options remain selected. For example, if you select to include deceased constituents, they are included every time you search. To exclude deceased constituents later, deselect the option.

***Note:*** When you search for a duplicate constituent, the **Advanced search options** are not sticky.

4. Click **Search**. The program searches the database for constituents that match the search criteria entered. In the **Results** grid, the constituents that match the criteria appear. Depending on the search criteria you enter, the search may return one constituent or many.
5. Under **Results**, click the name of the constituent record to open.

The constituent record opens.

If the constituent you want does not appear under **Results**, click **Add** on the action bar to add the constituent to the database.

- For information about how to add an individual constituent, see Add Individual Constituents on page 229.
- For information about how to add an organization constituent, see Add Organization Constituents on page 248.
- For information about how to add a constituent household, see Add Households on page 267.
- For information about how to add a constituent group or committee, see Add Constituent Groups on page 259.

# Constituent Search Screen

The table below explains the items on the Constituent Search screen. For information about how to access this screen, see Constituent Search on page 61.

| Screen Item | Description |
|---|---|
| **Last/Org/Group name** and **First name** | Enter the name of the constituent to find. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith. |
| **Lookup ID** | Enter the primary identifier used at your organization. You can enter the entire ID or only the beginning digits. For example, if you enter "1", all lookup IDs that begin with the number 1 appear. |
| **Email address** | Enter the constituent's email address. |
| **Address** | Enter the street address or post office box of the constituent to find, such as 7930 Baker Street. To search only by street name, use a wildcard character in place of the street number, such as "*Baker Street" or "%Baker Street". |
| **City** | Enter the city or town of the constituent to find. |
| **State** | Select the state of the constituent to find. |
| **ZIP/Postal code** | Enter the Zip code of the constituent to find. |
| **Phone number** | Enter the constituent's phone number. |
| **Match all criteria exactly** | To use search criteria exactly as entered, select this checkbox.<br>If you select this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered. |

| Screen Item | Description |
|---|---|
| **Search in** | When you click **Show advanced search options**, this field appears. Select the types of constituents to include in the search. |
| **Check nickname** | When you click **Show advanced search options**, this checkbox appears. To include nicknames from the Personal tab of individual constituent records in your search, select this checkbox and enter the nickname in the **First name** field. |
| **Check aliases** | When you click **Show advanced search options**, this checkbox appears. To include aliases from the Names tab of constituent records in your search, select this checkbox and enter the alias in the name fields. |
| **Check merged constituents** | When you click **Show advanced search options**, this checkbox appears. To include constituents merged from a duplicate constituent check, select this checkbox. |
| **Check alternate lookup IDs** | When you click **Show advanced search options**, this checkbox appears. To include alternate lookup IDs in your search, select this checkbox and enter the alternate lookup ID in the **Lookup ID** field. |
| **Only search primary addresses** | When you click **Show advanced search options**, this checkbox appears. To include only the primary addresses from the Contact tab of the constituent records in your search, select this checkbox and enter the primary address information in the address fields. |
| **Include deceased** | When you click **Show advanced search options**, this checkbox appears. To include constituents marked as deceased in the search, select this checkbox. |
| **Include inactive** | When you click **Show advanced search options**, this checkbox appears. To include constituents marked as inactive in the search, select this checkbox. |
| **Include fuzzy search on name** | When you click **Show advanced search options**, this checkbox appears. To return constituents with names that sound like the search criteria entered, select this checkbox. For example, if you select this checkbox and enter a last name of "Smith", the program includes constituents named "Smyth" in the results. |
| **Results** | When you click **Search**, the constituents that match the search criteria entered appear. For searches that return more than 100 constituents, only the first 100 appear. |

# Constituent Search Recommendations

The search criteria that you enter on the Constituent Search screen has a direct impact on how long it takes to get your search results. In general, we recommend that you be selective in your search criteria and use detailed information, but to ensure that you get search results in a timely manner, we also recommend that you consider the following tips before you enter search criteria.

- For the fastest search results, use the **Lookup ID** field only.
- If you don't have the lookup ID, the **Last/Org/Group name** field alone is nearly as fast as the **Lookup ID** field alone.

***Note:*** If you enter criteria in just the **Last/Org/Group name** and **ZIP/Postal** code fields, search results are a bit slower. This combination of fields is useful for common last names, but you may want to search by just last name for less common names.

- If you place wildcards at the start of search fields, the Constituent Search screen cannot use indexes and, therefore, search results are much slower. We recommend that you avoid wildcards at the start of search fields, especially "%."
- If you select **Include fuzzy search on name**, search results are noticeably slower. This checkbox can be useful when you are unsure how to spell a name or suspect the spelling you are entering may not match the constituent record. However, if you are confident about the spelling of a name, we recommend against using this checkbox.

# Need Help With Constituent Search?

If you find that you're receiving too many or not enough results in a constituent search, click **Show advanced search options** and use these options to narrow or expand your search:

- Select the type of constituent you want to search for: Individuals, Organizations, and/or Groups/Households.
- Select **Check nickname** to include nicknames from the Personal tab of individual constituent records in your search. Enter the nickname in the **First name** field.
- Select **Check Aliases** to include aliases from the Names tab of constituent records in your search. Enter the alias in each of the name fields.
- Select **Check alternate lookup IDs** to include alternate lookup IDs in your search. Enter the alternate lookup ID in the **Lookup ID** field.
- Select **Check merged constituents** to include constituents merged from a duplicate constituent check.
- Select **Only search primary addresses** to include only the primary addresses from the Contact tab of the constituent records in your search. Enter the primary address information in the address fields.
- Select **Include deceased** to include constituents marked as deceased in the search.
- Select **Include inactive** to include constituents marked as inactive in the search.
- Select **Include fuzzy search on name** to return constituents with names that sound like the search criteria entered. For example, if you enter a last name of "Smith", the program includes constituents named "Smyth" in the results. This option will slow search performance so we recommend against using this option if you are confident about the spelling of a name.

***Tip:*** Selected advanced search options will "stick" for all future constituent searches throughout ***Altru***. This allows you to set and forget search options or change them often for each individual search.

# Wildcards

You can use special characters called “wildcards” to define special conditions for a search field. For example, wildcards are extremely helpful when you are unsure how to spell a name or suspect something may be misspelled. Here is a list of wildcard characters and examples of how they are used.

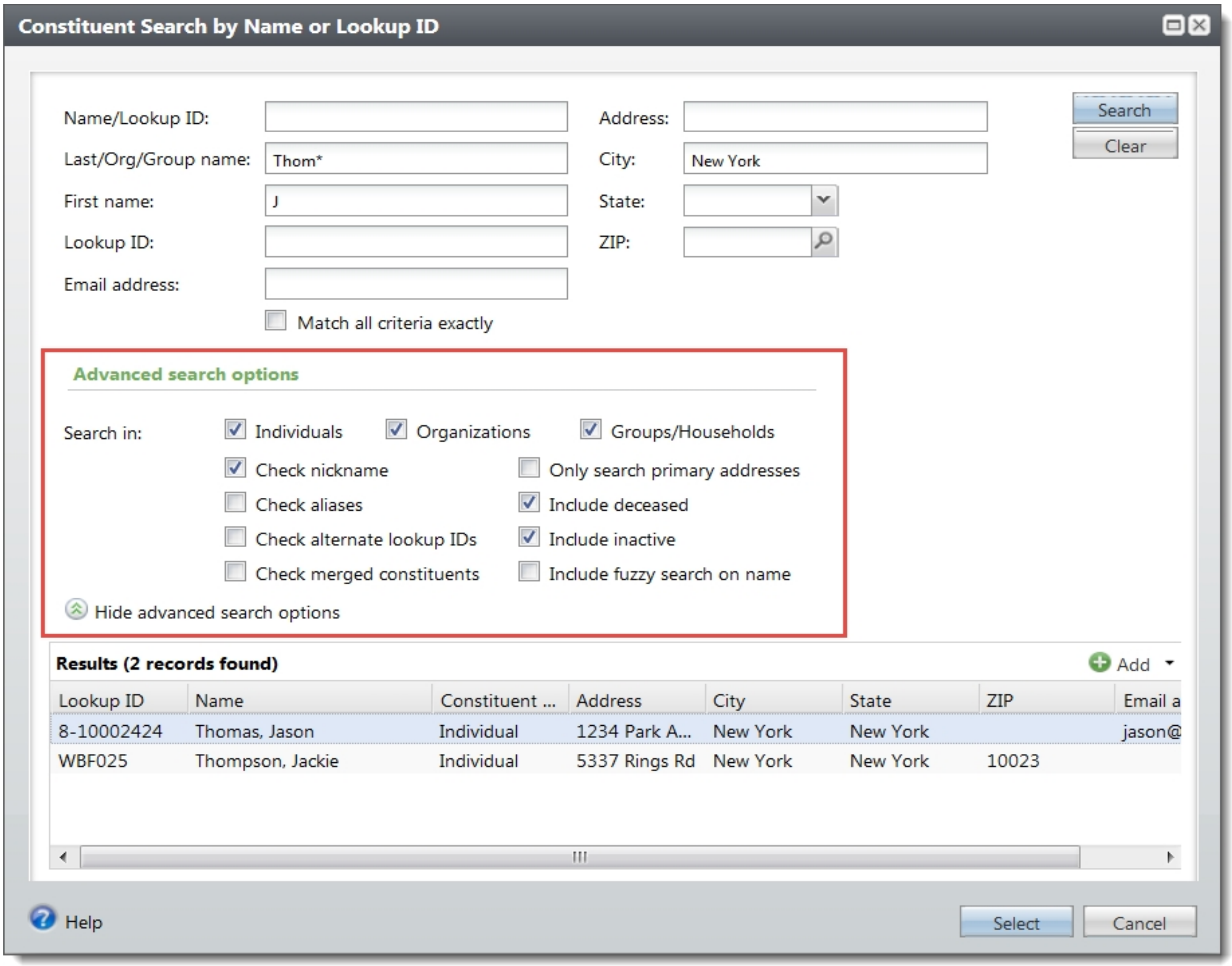
**Question Mark (?) or Underscore (_)**

Use the question mark or the underscore symbol to replace a character. When you include a question mark within a word, you search for every possible spelling of the word with the question mark in that specific spot. You can use multiple question marks within a word. For example, to locate any records with a last name like Smith or Smyth, you can enter Sm?th in the **Last name** field. The program selects all records whose last name fits the pattern specified.

**Asterisk (*) or Percent (%)**

Use the asterisk or percent sign to replace a series of characters. For example, to locate all constituents with a last name like Johnson, you can enter John* in the **Last name** field. The search results include all constituents with a last name that starts with “John”, such as Johnson, Johnssen, and Johnston.

***Tip:*** We recommend that you avoid placing wildcards at the start of search fields, especially "%", because it can cause search results to process much slower.




# Post Code Search

You can use the Post Code Search screen to locate postal codes within a specific location. For postal codes to appear in the search results, a system administrator must import a *.csv file that contains a list of codes. When you enter a city and state on the Post Code Search screen, all codes that match the criteria appear.

For information about how to import postal codes, see the *Administration Guide*.

## Search for a postal code

1. From a search screen, click **Search** in the **ZIP/Postal code** field. The Post Code Search screen appears.
2. Enter the search criteria.

> ***Tip:*** If you do not select **Match all criteria exactly**, you can use "wildcard" characters in place of parts of search criteria, such as if you are unsure of an exact spelling. To replace a group of

characters, use an asterisk (*) or percent sign (%). To replace a single character, use a question mark (?) or an underscore (_). For example, to return all constituents with a last name that ends with "son" such as Johnson and Williamson, enter "*son" or "%son" as the last name. To find the last name of Smith or Smyth, enter "Sm?th" or "Sm_th".

3. Click **Search**. The program searches the database for postal codes that match the criteria entered.
4. Under **Results**, select the postal code to use and click **Select**. You return to the record search screen, and the postal code appears in the **ZIP/Postal code** field.

# Edit the Primary Lookup ID for a Constituent

When you add a constituent record to the database, the program automatically assigns it a lookup ID. This primary lookup ID appears in the **Lookup ID** field on the constituent record. You can edit this lookup ID as necessary.

***Note:*** Rather than edit the primary lookup ID, you can also assign alternate lookup IDs for the constituent. For information about how to add an alternate lookup ID, see Add Alternate Lookup IDs for a Constituent on page 107.

# Write a Letter to a Constituent

From a constituent record, you can write a personal letter to the constituent.

When you write the letter, you can use a Microsoft *Word* document saved to the Letter Template Library. Before you write the letter, you must complete several setup tasks in *Administration*, *Marketing and Communications*, and Microsoft *Word*:

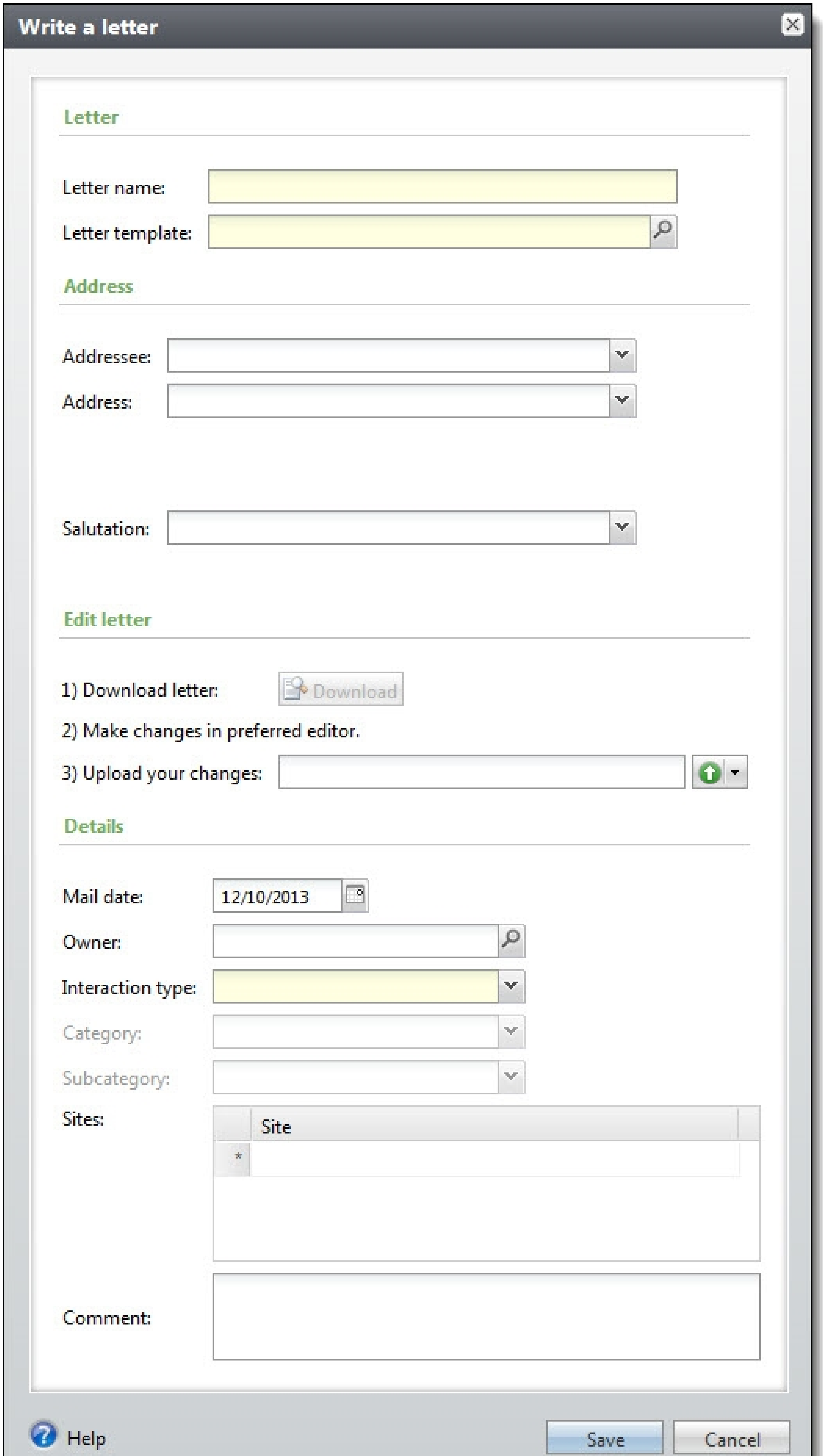
1. From *Administration*, create a constituent export definition that specifies the merge fields to use on the letter. On the Set save options tab of the definition, select **Allow definition to be used by other areas of the application**.
2. From *Marketing and Communications*, in the Letter Template Library, generate a header file based on the export definition created in step 1.
3. In *Word*, create a document for the letter content and insert the merge fields from the header file created in step 2. Save the file in *.docx format.
4. From *Marketing and Communications*, in the Letter Template Library, create a letter template with a Constituent letter type and Export definition output type. In the **Export definition** field, select the export definition created in step 1. In the **Letter** field, select the *Word* document created in step 3.

### Write a letter

1. Open the record of the constituent to receive the letter. For information about how to open a constituent record, see Constituent Search on page 61.

***Note:*** To access the Write a letter screen from the Contact tab of the constituent record, under **Contact information**, select the address to which to send the letter and click **Write a letter**.

2. Under **Tasks**, click **Write a letter**. The Write a letter screen appears.


Write a letter
Letter
Letter name:
Letter template:
Address
Addressee:
Address:
Salutation:
Edit letter
1) Download letter:
Download
2) Make changes in preferred editor.
3) Upload your changes:
Details
Mail date:
12/10/2013
Owner:
Interaction type:
Category:
Subcategory:
Sites:
Site
Comment:
Help
Save
Cancel

3. Under **Letter**, enter a unique name to help identify the letter.

   Search for and select the document to use from the Letter Template Library.
4. Under **Address**, select the addressee, address, and salutation to use with the letter.

***Note:*** If you select a letter template based on an export definition, the Address section is disabled. The export definition provides the addressee, address, and salutation.

5. Under **Edit letter**, you can download and edit the contents of the letter. Click **Download** to open the letter in an editor, make your changes, and save the letter locally. Then, click the green arrow to upload the updated letter.
6. Under **Details**, enter the date you send the letter to the constituent.
7. If your user account is linked to the constituent, the **Owner** field defaults to you. You can assign any user in the database as the owner.
8. To help categorize the letter with similar interactions, select its type, category, and subcategory.
9. To restrict use of the letter to specific sites at your organization, select the sites to manage the letter.
10. In the **Comment** field, enter any additional information about the letter.
11. Click **Save**. You navigate to the Documentation tab on the constituent interaction page.

# Write a Letter Screen

The table below explains the items on the Write a letter screen.

| Screen Item | Description |
|---|---|
| **Letter name** | Enter a unique name to help identify the letter, such as Personal thank you. |
| **Letter template** | Search for and select the template to use.<br>To use a template from your network or computer, you must first add it to the Letter Template Library. To add a template from the search screen, click **Add** on the action bar of the **Results** grid. On the Add letter template screen, select the file to add and click **Save**. To use merge fields to automatically enter information from your database in the letter, such as name and address, the template must be a Microsoft *Word* document.<br>For information about the Letter Template Library, see the *Marketing and Communications Guide*. |
| **Addressee** | Select the addressee to use with the letter. The addressee determines how the person's name appears on the letter, envelope, and label. |

| Screen Item | Description |
|---|---|
| **Address** | Select the address to receive the letter.<br>If you access the Write a letter screen from the Contact tab, this field automatically displays the address selected under **Contact information**, **Address**. |
| **Salutation** | Select the salutation to use with the letter. The salutation determines how you greet the person in the letter and can be formal or informal. |
| **Download letter** | To edit the contents of the letter, click **Download**. Open the file in your preferred text editor, and save it locally. |
| **Upload your changes** | Once you have saved your updated letter locally, click the green arrow to upload the new file. |
| **Mail date** | Enter the date you send the letter.<br>When you save the letter, it appears on the Documentation and Interactions tab for the record, under **Interactions**. The mail date appears in the **Date** column. |
| **Owner** | Enter an owner for the letter. If your user account is linked to this constituent, your name defaults in this field, but you may edit it if necessary. |
| **Interaction type** | Select the interaction type of the letter, such as Mail or Letter.<br>When you save the letter, it appears on the Documentation and Interactions tab for the record, under **Interactions**. The interaction type appears in the **Type** column. |
| **Category** and **Subcategory** | To further define the interaction type of the letter, select its applicable category and subcategory. |
| **Sites** | To restrict use of the letter to specific sites at your organization, select the sites to manage the letter. |
| **Comment** | Enter any additional information about the letter. |

# Delete a Constituent

When you no longer need a constituent record, you can delete it from your database. Before you delete a constituent record, we recommend you first back up your database.

***Tip:*** To retain a history of the constituent in your database but still limit access and use of the constituent record, mark the constituent as inactive rather than delete the record. For information about how to mark a constituent as inactive, see Mark a Constituent as Inactive or Active on page 98. If a constituent passes away, you can mark the constituent as deceased rather than delete the record. For information about how to mark deceased constituents, see Mark an Individual Constituent as Deceased on page 242.

On the constituent record, click **Delete constituent** under **Tasks**. When a message appears to ask whether to delete the constituent, click **Yes**.

# Individual Summary

To view an overview of an individual constituent including the revenue, activities, and household members associated with the constituent, select the Summary tab.

Under **Revenue summary**, information about the total revenue received from the constituent, such as toward giving, memberships, and events, appears. If the constituent is a member of a constituent household, you can also view the total giving received from the household. To view the complete revenue history for the individual, click **View all revenue**. The Revenue and Recognition page for the individual appears. For information about the items on this page, see Revenue Information on page 157.

Under **Recent revenue**, the most recent revenue transactions received from the individual appear. To view more information about a transaction, click its link. The revenue record of the transaction appears.

Under **Recent and upcoming activities**, the most recent or pending interactions or activities such as event registrations or volunteer opportunities associated with the constituent appear. To view the more information about an activity, click its link. The record of the activity appears.

Under **Recent and upcoming communications**, the most recent or pending communications associated with the individual appear. To view all communication with the constituent, click **View all**. The Communications page for the constituent appears. For information about the items on this page, see Communications Information on page 195.

# Group or Household Summary

To view an overview of a constituent group or household including its members and primary contact, select the Summary tab.

Under **Group information** or **Household information**, you can view a description of the constituent group or household, the name of its primary contact, the date your organization added it to your database, and whether it gives anonymously. To view the constituent record of the primary contact, click the contact's name in the **Primary contact** field.

Under **Revenue summary**, information about the group or household's revenue history appears, including the total giving received from it and its members. To view the complete revenue history for the group or household, click **View group giving**. The Revenue Information page for the group or household appears. For information about the items on this page, see Revenue Information on page 157.

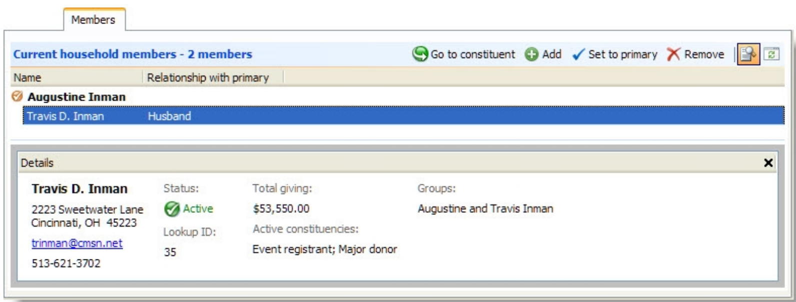
Under **Recent completed interactions**, the four most recent interactions with the constituent group or household or its members appear. To view all interactions with the group or household and its members, click **View all**. The Interactions page for the constituent group or household appears. For information about the items on this page, see Interaction Information on page 187.

Under **Recent communications**, the four most recent communications with the constituent group or household or its members appear. To view all communication with the group or household and its members, click **View all**. The Communications page for the constituent group or household appears. For information about the items on this page, see Communications Information on page 195.

Under **Current household members**, the names of the primary contact and next three members for the constituent group or household appear. You can view the active constituencies for each member that appears. For each of the additional three members, you can also view the relationship with the primary contact. To view all members of the group or household, click **View group members** or **View household members**. The record opens to the Members tab. For information about the items on this tab, see Group or Household Members on page 74.

# Group or Household Members

To view all the members of a constituent group or household, select the Members tab. Under **Current group members** or **Current household members**, the active members of the group or household appear. A checkmark indicates the primary contact. For each additional member, you can view the relationship with the primary contact.




***Note:*** For a dissolved constituent household, the **Previous household members** grid appears and displays the former members of the household. For information about this grid, see Manage Previous Members of a Group or Household on page 280.

To view additional information about a member, select the member in grid and click **Show Details** on the action bar. The **Details** window appears and displays the address, status, lookup ID, total giving, and active constituencies of the member. You can also view the constituent groups and household that include the member.

To view additional information about a member, click the member's name. The constituent record of the member appears. For information about the items on an individual constituent record, see Individual Constituent Record on page 239.

From the grid, you can manage the members of the constituent group or household as necessary.

# Add Members to a Constituent Household

From the Members tab, you can add members to the constituent household.

### Add a member to a constituent household

1. Open the record of the constituent household with the member to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.

3. Under **Current household members**, click **Add**. The Add a household member screen appears. For information about the items on this screen, see Add a Household Member Screen on page 75.
4. Search for and select the individual to add to the household.

***Tip:*** If you know the individual is not already a constituent, click **Add**in the **Constituent** field to add the individual.

5. To copy the primary contact information of the household to the record of the new member, select **Copy household's primary contact information**.
6. Under **Household relationships**, select the relationships between the new member and the existing members, such as Father and Daughter.

***Note:*** When you add a new member to a household, the program automatically adds the member as an individual relationship to the Relationships tabs of all members of the household. From the Relationships tab, you can define the relationship the new members has with each member of the household.

7. Click **Save**. You return to the Members tab.

## Add a Household Member Screen

The table below explains the items on the Add a household member screen. For information about how to access this screen, see Add Members to a Constituent Household on page 74.

| Screen Item | Description |
|---|---|
| **Constituent** | Search for and select the individual to add to the household.<br>If you know the individual is not already a constituent, click **Add** to add the individual. |
| **Copy household's primary contact information** | To copy the primary contact information of the household to the record of the member, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab. |
| **Household relationships** | Select the relationships between the new member and the existing members, such as Father and Daughter. |

# Add Members to a Constituent Group

From the Members tab, you can add members to the constituent group.

### Add a member to a constituent group

1. Open the record of the constituent group with the member to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Members tab, click **Add**. The Add a group member screen appears.

3. In the **Member** field, search for and select the constituent to add as a group member. For information about the search screen, see Constituent Search on page 61.
4. Enter a start date for the group member.

   When a constituent is no longer a member of the group, you can remove the constituent and enter an end date.
5. Enter any comments about the group member.
6. Click **Save**. You return to the Members tab.

# Edit Members of a Constituent Group

From the Members tab, you can edit information about members of the constituent group.

### Edit a member of a constituent group

1. Open the record of the constituent group with the member to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.
3. Under **Current group members**, select the member to edit and click **Edit**. The Edit a group member screen appears.
4. Edit the start date, end date, or comments as necessary.
5. Click **Save**. You return to the Members tab.

# Set a Member of a Constituent Group or Household as the Primary Contact

From the record of a constituent group or household, you can select the member to be its primary contact. On the Members tab, select the member to act as the primary contact and click **Set to primary**. A checkmark indicates the primary contact of the group or household.

# Remove a Member from a Constituent Group or Household

From the Members tab, you can remove members from a constituent group or household.

### Remove a member from a constituent group or household and maintain member history

1. Open the record of the constituent group or household with the member to remove. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.

3. In the grid, select the member to remove and click **Edit**. The Edit member screen appears.
4. In the **End date** field, select the date the constituent ends its membership of the group or household.
5. Click **Save**. You return to the Members tab. In the grid, the member no longer appears unless the Include previous members checkbox is marked.

### Remove a member from a constituent group or household and not maintain member history

***Tip:*** To maintain the member's history with the group or household, edit the member and enter an end date rather than delete the member.

1. Open the record of the constituent group or household with the member to remove. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.
3. In the grid, select the member to remove and click **Delete**. A message appears to ask whether to remove the member from the group or household.
4. Click **Yes**. You return to the Members tab.

## Roles for Group Members

You can assign roles to members of a constituent group. For example, if a group represents a planning committee for your organization, you might assign roles such as Co-chair and Secretary to its members. A group member may have multiple roles. In addition, roles can have start and end dates to signify the term or amount of time a member serves in the role.

### Add a role for a group member

1. Open the record of the constituent group with the member to assign to a role. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.
3. Under **Current group members**, select the member to assign to a role.
4. On the action bar, click **Add** and select **Role**. The Add a role screen appears.
5. Select the role to assign to the group member.
6. Assign a start date for the member in the role, if known. If the role has a set term, such as one that corresponds with your fiscal year, enter both the start and end dates.
7. Click **Save**. You return to the Members tab.

### Edit a role

1. Open the record of the constituent group with the role to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Members tab.

3. Under **Current group members**, select the role to edit.
4. On the action bar, click **Edit**. The Edit a role screen appears.
5. Edit the start or end date for the member in the role.
6. Click **Save**. You return to the Members tab.

### Delete a role

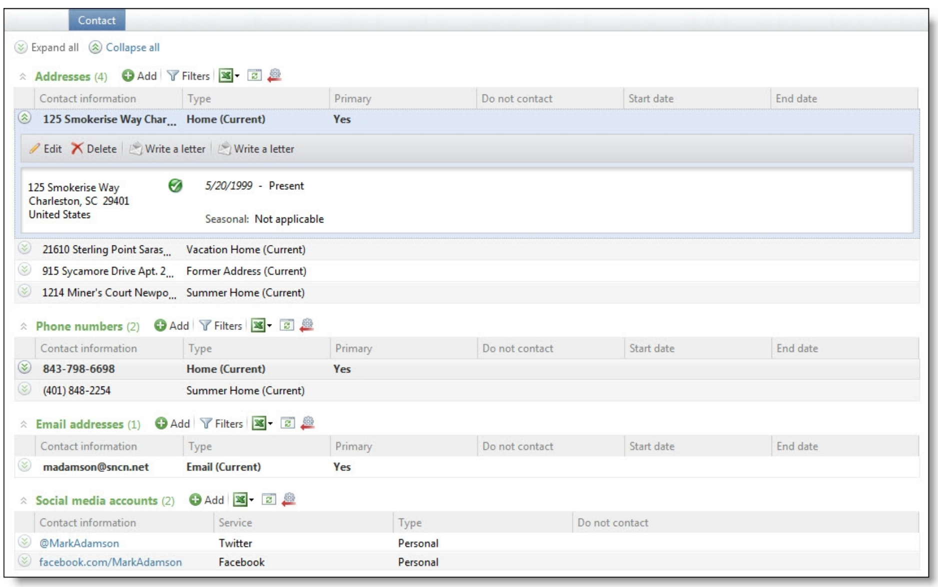
You can delete a role from a group member, such as if you add it in error. When you delete a role, it is removed from the member's history.

***Tip:*** If a member serves in a role for a term, such as co-chair for a year, edit the role and enter the appropriate start and end date to preserve the member's history in the group.

On the Members tab on the constituent group's record, select the role to delete and click **Delete**. When a message appears to ask whether to delete the role, click **Yes**.

# Contact Information

To manage the view and manage the contact information for the constituent, select the Contact tab.




Under **Addresses**, the address information for the constituent appears, including start and end dates and whether to mail to the address. A lock and the word "Confidential" indicates the constituent has requested the address is not to be shared with others outside your organization. To display former addresses in addition to current addresses for the constituent, select **Show former contact information** and click **Apply**.

Under **Addresses**, you manage the constituent's address information. You set the default address format in *Administration*. After you add a country on the Countries and States page in *Administration*, you can define its default address format. When you add an address, the country you select determines the address format. For information about how to define a default address format, see the

*Administration Guide*.

***Note:*** You can write a letter to a constituent from the Contact tab. Under **Addresses**, click **Write a letter** on the action bar of the address to receive the letter. For information about how to write a letter, see Write a Letter to a Constituent on page 68.

Under **Phone numbers**, all phone numbers for the constituent appear. From the Contact tab, you can manage the constituent's phone number information.

Under **Email addresses**, the email addresses for the constituent appear. From the Contact tab, you can manage the constituent's email address information.

Under **Social media accounts**, the constituent's accounts for social media and social networking appear. From the Contact tab, you can manage information about the constituent's participation in sites such as *Facebook*, *Google+*, *LinkedIn*, *Twitter*, and blogs. You can also link to the constituent's profile page for each account.

# Add Addresses

On the Contact tab of a constituent record, you can add addresses for the constituent. You can designate one address as the primary address. You can also select whether to send mail to the address.

When you add an address for an individual, you can automatically copy it to the record of an associated constituent household and to all members of the household.

### Add an address

1. Open the record of the constituent with the address to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under Addresses, click **Add**. The Add address screen appears. For information about the items on this screen, see Add Address Screen on page 80.
4. Select the Address tab.
5. Under **Address information**, select the type of address to enter, such as Home or Business, and enter the address information.
6. With *Data Tune-Up*, you can use an address validation service to verify the address entered exists. When you use the address validation service, the program updates missing or incomplete information such as the Zip code, standardizes the street address, and updates the Coding Accuracy Support System (CASS) certified information.

   To not include the address entered when your organization runs the address validation process, select **Omit from validation**.

   To run the address validation process for the address now, click **Validate**. The program updates the address fields accordingly. If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84.
7. In the **Start date** field, enter the date the constituent begins use of the address.

***Note:*** If you leave the **Start date** field blank, the program uses the date you enter the address as the start date and displays the start date in italics on the Contact tab.

8. If the constituent changed to the address from an address on the constituent record, select **Recently moved/changed to the above address** and, in the **Old address** field, select the former address. When you save the new address, the program automatically marks the selected old address as a former address.
9. To use the address entered as the primary address for the constituent, select **Set as primary address**.
10. If the constituent requests that you not send mail to the address, select **Do not send mail to this address**. In the **Reason** field, select why the constituent does not want to receive mail at the address.
11. If the constituent has a household relationship, the **Copy address to household and members** checkbox appears. To copy the address to the record of the constituent household and its members, select this checkbox.
12. If the constituent requested that the address is not to be shared with others outside your organization, select **This address is confidential**. When you mark an address as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the address on the Contact tab so users know not to share the address information.
13. If the address entered is a seasonal address, under **Seasonal information**, enter the start and end dates for the time period the constituent uses the address.
14. Under **Address source**, you can select a source for the address information, as well as enter any comments. For example, if the spouse of a constituent lets you know about a new address, you can add the address and select Family Member for the information source.
15. To enter additional information about the address, select the Details tab.
16. Click **Save**. You return to the Contact tab. The new address appears.

# Add Address Screen

| Screen Item | Description |
|---|---|
| **Type** | On the Address tab, select the type of address for the constituent, such as Business or Home. |
| **Country** | Select the country for the constituent's address.The country you select determines the fields that appear on the screen. For example, if you select "United Kingdom" instead of "United States", the **County** and **Postcode** fields appear instead of **State** and **ZIP**. |
| **Address** | Enter the street address or post office box for the constituent. |
| **City** | Enter the city or town for the constituent address. |
| **State** | Select the state for the constituent address. |

| Screen Item | Description |
|---|---|
| **ZIP** | Enter the Zip code for the constituent address. If your administrator has imported a ZIP code table, you see a search icon on this field that you can use to search for the correct ZIP code. |
| **Omit from validation** | With *Data Tune-Up*, you can run an address validation process to verify addresses entered in the database exist. When you run the address validation process, the program automatically updates missing or incomplete address information, standardizes street addresses, and updates the Coding Accuracy Support System (CASS) certified information.<br><br>To not include the address entered when your organization runs the address validation process, select this checkbox. |
| **Validate** | To run the address validation process to verify the address entered exists, click this button. The address validation process verifies the address, and the program automatically updates the address accordingly.<br><br>If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84. |
| **Start date** | Select the date when the constituent begins use of the address. |
| **End date** | When you edit an address, this field appears. To retain the address as a former address for the constituent, select the date when the constituent stops use of the address. When you enter an end date, the program automatically marks the address as Do not mail. |
| **Recently moved/changed to the above address** | When you add an address, this checkbox appears. If the constituent moved or changed from an existing address on the constituent record to this address, select this checkbox.<br><br>If you select this checkbox, in the **Old address** field, select which address from the record the new address replaces. When you save the new address, the program automatically marks the selected address as a former address and as Do not mail. It also uses the start date of the new address as the end date of the former address. |
| **Set as primary address** | To designate the address as the constituent's main address for communications, select this checkbox. By default, the first address you enter for a constituent is the primary address. You can enter only one primary address for a constituent. Under **Addresses** on the Contact tab, the primary address appears first. |
| **Do not send mail to this address** | If the individual requests that you not send mail to the address, select this checkbox. |
| **Reason** | If you select **Do not send mail to this address**, this field is enabled. Select why the individual requests to not receive mail at the address. |
| **Copy address to household members** | When the constituent is a member of a household with additional members, this checkbox appears. To copy the address to the household and its members, select this checkbox. |

| Screen Item | Description |
|---|---|
| **This address is confidential** | If the constituent requested that the address is not to be shared with others outside your organization, select **This address is confidential**. When you mark an address as confidential, it is not excluded from reports or queries. A lock icon and the word “Confidential” appears with the address on the Contact tab so users know not to share the address information. |
| **Seasonal information** | For a seasonal address, select the start and end dates for the time period when the constituent uses the address. |
| **Information source** and **Comments** | When you add or make changes to an address, you can select a source for the information and enter any comments. For example, if the spouse of a constituent lets you know about a change of address, you can make the changes and select “Family Member” for the information source. |
| **County** | Select the county for the constituent address. If you validate the address, the county received from the address validation service automatically appears. |
| **Reason** | Appears only on the Revert address screen. Enter a **Reason** for the reversion. You create reasons in the **Reason codes** tool accessed under **Configuration** on the Constituent page. |
| **DPC** | Enter the Delivery Point Code (DPC) for the address. DPC is a POSTNET barcode that contains a ZIP+4 barcode plus two additional digits (or 10 additional bars) to designate a specific delivery point. The barcode consists of 62 bars total, with beginning and ending frame bars and five bars each for the nine digits of the ZIP+4, the last two digits of the primary street address or post office box, and a correction digit.<br><br>If you receive a three-digit DPC from your vendor, enter only the first two digits. The first two digits of the DPC are the last two digits of the street address number.<br><br>If you validate the address, the DPC received from the address validation service automatically appears. |
| **CART** | Enter the Carrier Route (CART) for the address. CART refers to the addresses served by the postal carrier and the route used to deliver the mail. The CART can include the city, rural, and highway contract routes.To ease the delivery of mail and receive a postal discount, you can add CART information to addresses in your mailings.<br><br>If you validate the address, the CART received from the address validation service automatically appears. |
| **LOT** | Enter the Line of Travel (LOT) for the address. LOT is the direction the mail carrier takes along a CART. LOT information is required for standard mailings to receive the Basic Enhanced Carrier Route rate.<br><br>If you validate the address, the LOT received from the address validation service automatically appears. |
| **Region** | Select the region for the address, such as North or Southeast. |
| **Congressional district** | Select the congressional district for the address. If you validate the address, the district received from the address validation service automatically appears. |

| Screen Item | Description |
|---|---|
| **State House district** | Select the state House district for the address. |
| **State Senate district** | Select the state Senate district for the address. |
| **Local precinct** | Select the local precinct for the address. |
| **Validation information** | If you click **Validate** or include the address in an address validation process, the information from the process appears, such as the last validation attempt and the message received from the validation service. |

# Edit an Address for a Constituent

From the Contact tab of a constituent record, you can edit addresses as necessary. When you edit an address, you can add an end date to retain the address as a former address, such as if the constituent moves to a new residence.

## Edit an address

1. Open the record of the constituent with the address to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Select the address and click **Edit**. The Edit address screen appears. The items on this screen are the same as the Add address screen. For information about the items on this screen, see Add Address Screen on page 80.
4. On the Address tab, edit the address information as necessary.

   To retain the address as a former address for the constituent, under **Address information**, in the **End date** field, select the date stops use of the address. When you enter an end date for an address, the program automatically marks the address as Do not mail.

***Tip:*** You cannot enter an end date for the primary address of the constituent. To make a primary address a former address, you must first add and select **Set as primary address** for the new primary address.

5. On the Details tab, edit additional information about the address as necessary, such as its source or region.
6. Click **Save**. You return to the Contact tab.

# Delete an Address for a Constituent

From the Contact tab of a constituent record, you can delete a constituent address, such as when you no longer need it.

***Note:*** To preserve a record of address history, you can edit an address and add an end date to indicate the address is no longer in use.

### Delete an address

1. Open the record of the constituent with the address to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Select the address and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the Contact tab. The address no longer appears.

# Validate an Address for a Constituent

With *Data Tune-Up*, you can use the address validation service to verify that addresses you enter exist. When you validate an address, the program automatically standardizes its format, corrects misspelled words, and updates it with missing information such as the Zip code.

To validate an address entered for a constituent, such as on the Add address screen or Add an individual screen, click **Validate**. If the address entered is valid, the program automatically updates it accordingly. If the program cannot validate an address, such as when the address is incorrect or provides possible matches, a message appears to ask whether to search for the correct address.

### Search for a valid address for a constituent

1. Next to the address entered for a constituent, such as on the Add address screen or Add an individual screen, click **Validate**. If the address is invalid, such as when it contains incorrect information or provides possible matches, a message appears to ask whether to search for the correct address.
2. Click **Yes**. The address validation screen appears.
3. Verify the address information entered is correct.
4. Click **Search**. Under **Results**, information about possible addresses that match the criteria entered appear.
5. Under **Select a street**, the possible street names that match the criteria appear. If the results return multiple street names, select the street name you think is correct.
6. Under **Address ranges for selected**, the address ranges for the selected street name appear. Determine the correct street address for the constituent and update the **Address** field as necessary.
7. Click **Validate**. If the address is valid, you return to the previous screen. The program standardizes the address and updates it with any missing information.

# Map an Address for a Constituent

From the Contact tab of a constituent record, you can view a map of the constituent address. To create a map, your organization must have Microsoft *Virtual Earth* installed and you must have rights to the mapping software.

***Note:*** Before you can create a map of an address, you must first create a geocode for the address. If the address is not coded, the **Geocode** button appears. For information about how to code an address, see Geocode an Address for a Constituent on page 85.

To map an address, select an address and click **Map**. The Mapping page appears and displays the location of the address. From the Mapping page, you can create and save the map.

# Geocode an Address for a Constituent

Before you can create a map of a constituent address, you must first create a geocode for the address. To create a geocode, your organization must have Microsoft *Virtual Earth* installed and you must have rights to the mapping software.

### Create a geocode for a constituent address

1. Open the record of the constituent with the address to geocode. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Contact information**, select the address to create a geocode for.
4. On the action bar, click **Geocode**. A message appears to ask whether to create a geocode for the address.
5. Click **Yes**. You return to the Contact tab. When you select the address, the **Map** button appears. For information about how to view a map for the address, see Map an Address for a Constituent on page 85.

# Address Attributes and the Address Page

From *Administration*, you can enable attribute categories for addresses. With attributes, you can track additional information about addresses, such as the number of mail pieces returned. If attributes are enabled for addresses, you can access the address page for an address to view basic information and attributes for the address.

***Note:*** For information about how to manage attribute categories, see the *Administration Guide*.

To access the address page, click the address under **Contact information** on the Contact tab of the constituent record.

On the address page, basic address information appears on the Address tab. Additional information, including address validation information, appears on the Details tab. On the Attributes tab, you can manage the address attributes. To edit the address from the Address page, click **Edit address** under **Tasks**. To return to the Contact tab of the constituent record, select the address and click **Edit**.

### Add an address attribute

1. Open the record of the constituent with the address to assign an attribute. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Contact information**, click the address. The Address page appears.
4. Select the Attributes tab.
5. Under **Attributes**, click **Add**. The Add address attribute screen appears.
6. In the **Category** field, select the type of attribute to assign to the address.
7. In the **Value** field, enter or select the value of the attribute to assign to the address.
8. If the attribute applies to the address for a finite duration, select the start and end dates of the attribute.
9. Enter any additional information to record about the address attribute.
10. Click **Save**. You return to the Attributes tab.

### Edit an address attribute

1. Open the record of the constituent with the address attribute to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Contact information**, click the address with the attribute to edit. The Address page appears.
4. Select the Attributes tab.
5. Under **Attributes**, select the attribute to edit.
6. On the action bar, click **Edit**. The Edit address attribute screen appears.
7. Edit the information as necessary.
8. Click **Save**. You return to the Attributes tab on the Address page.

### Delete an address attribute

1. Open the record of the constituent with the address attribute to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Contact information**, click the address with the attribute to edit. The Address page appears.
4. Select the Attributes tab.

5. Under **Attributes**, select the attribute to delete and click **Delete**. A message appears to ask whether to delete the attribute.
6. Click **Yes**. You return to the Attributes tab.

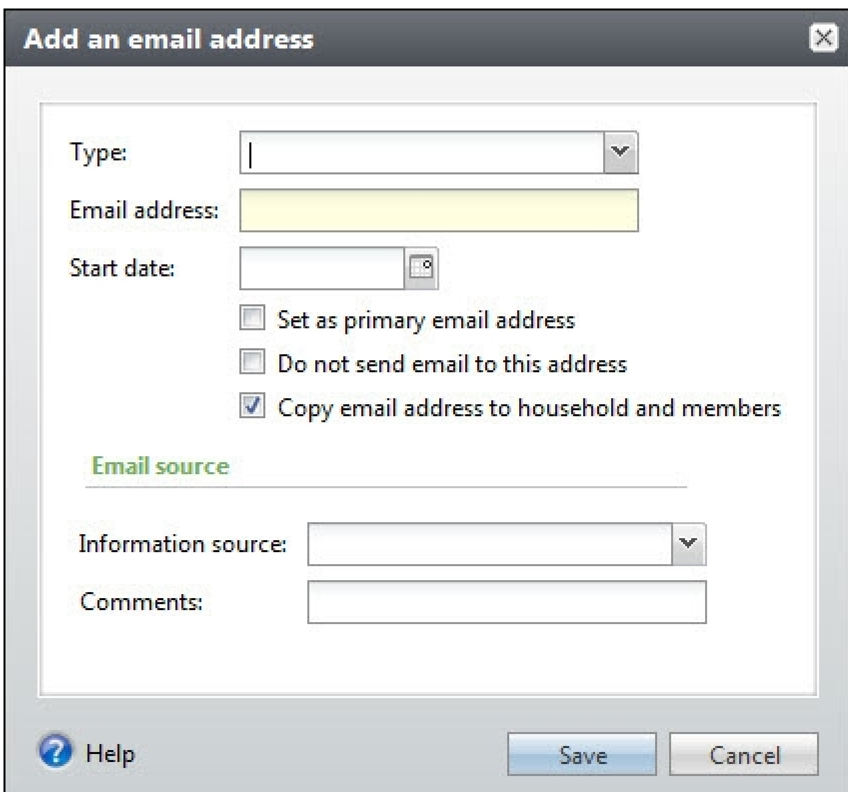
# Add Email Addresses for a Constituent

From the Contact tab of a constituent record, you can add email addresses for the constituent. You can specify a start date for the email address. You can designate one email address as the primary address. You can also select whether to send email to the address.

When you add an email address for an individual, you can automatically copy it to the record of an associated constituent household and to all members of the household.

## Add an email address

1. Open the record of the constituent with the email address to add.
2. Select the Contact tab.
3. Under **Email addresses**, click **Add**. The Add an email address screen appears.




4. In the **Type** field, select the type of email address to add, such as Home or Business.
5. In the **Email address** field, enter the email address for the constituent.
6. You can enter a start date for the email address, if known.

7. Only one email address can be marked as the primary one. If the constituent has only one email address, the **Set as primary email address** checkbox is marked and disabled. If there are multiple email addresses for the constituent and this is the primary one for the constituent, select this checkbox. This email address will be marked as primary and the previous number will no longer be marked as primary.
8. If the constituent requests that you not send email to the address, select **Do not send email to this address**.
9. If the constituent has a household relationship, the **Copy email address to household and members** checkbox appears. To copy the address to the record of the constituent household and its members, select this checkbox.
10. Under **Email source**, you can select a source for the email address information, as well as enter any comments. For example, if the spouse of a constituent lets you know about a new email address, you can add the email address and select "Family Member" for the information source.
11. Click **Save**. You return to the Contact tab.

# Add an Email Address Screen

The table below explains the items on the Add an email address screen.

| Screen Item | Description |
|---|---|
| **Type** | Select the type of email address for the record, such as Business or Home. |
| **Email address** | Enter the email address. |
| Start and end dates | Select the date when the constituent begins use of the email address, if known.<br>When you edit an email address, the **End date** field appears. To retain the email address as a former email address for the constituent, select the date when the constituent stops use of the email address. |
| **Set as primary email address** | To designate the address as the record's primary email address for communications, select this checkbox. By default, the first email address you enter for a record is the primary email address. You can enter only one primary email address for a record. Under **Contact information**, **Email address** on the Contact tab, the primary address appears first. |
| **Do not send email to this address** | If the contact requests that you not use the email address, select this checkbox. |
| **Information source** and **Comments** | When you add or make changes to an email address, you can select a source for the email information and enter any comments. For example, if the spouse of a faculty member lets you know about a change of email address, you can make the changes and select "Family Member" for the information source. |

# Edit an Email Address for a Constituent

From the Contact tab of a constituent record, you can edit email addresses as necessary.

### Edit an email address

1. Open the record with the email address to edit.
2. Select the Contact tab.
3. Select the email address to edit and click **Edit**. The Edit email address screen appears. The items on this screen are the same as the Add an email address screen. For information about the items on this screen, see Add an Email Address Screen on page 88.

***Tip:*** You cannot enter an end date for the primary email address of the constituent. To make a primary email address a former email address, you must first add and select **Set as primary email address** for the new primary email address.

4. Edit the information as necessary.

***Note:*** If an email address is blacklisted, a message appears under the **Email address** field. The program will not send email to such an address. An email address is blacklisted if it returns a hard bounce when you send email through ***Blackbaud Internet Solutions*** or if you blacklist the address on the Email Services page in *Administration*. A hard bounce indicates a permanent delivery failure such as when the Internet Service Provider reports that the address is canceled or nonexistent. The program does not blacklist soft bounces that indicate temporary delivery failures such as network issues or full mailboxes. If an address is blacklisted, you can correct the address so that the constituent can receive email from your organization. Or if you think the email address is incorrectly marked as invalid, you can update its status on the Email Services page in *Administration*.

5. Click **Save**. You return to the Contact tab.

# Delete an Email Address for a Constituent

From the Contact tab of a constituent record, you can delete a constituent email address, such as when you no longer need it.

### Delete an email address

1. Open the record of the constituent with the email address to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Select the address to delete and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the Contact tab. The email address no longer appears.

# Add Phone Numbers for a Constituent

On the Contact tab of a constituent record, you can add phone numbers for the constituent. You can designate one number as the primary phone number. You can also select whether to use the number to contact the constituent.

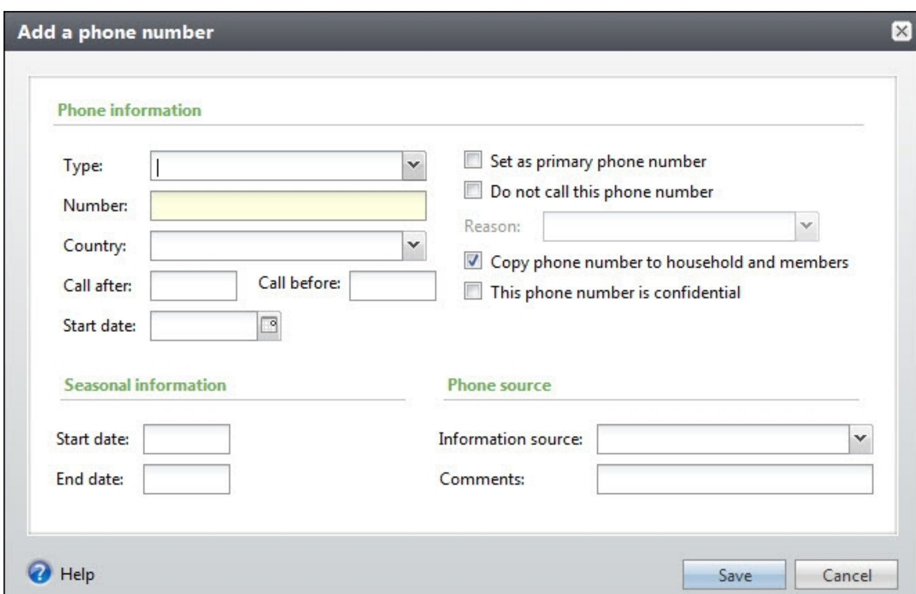
You can also enter times to indicate the constituent's calling preferences for the phone number, such as "call after 9:00 a.m." If you add or make changes to a number, you can select a source for the phone information and enter any comments. For example, if the spouse of a constituent lets you know about a change of phone number, you can make the changes and select "Family Member" for the information source.

You can enter start and end dates for phone numbers to indicate whether or not the number is still in use. If a number is no longer valid, you can enter an end date and select **Do not call this phone number**. You can also select a reason to explain why the number should not be used, such as "No longer in service."

When you add a phone number for an individual, you can automatically copy it to the record of an associated constituent household and to all members of the household.

## Add a phone number

1. Open the record of the constituent with the phone number to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Phone numbers**, click **Add**. The Add a phone number screen appears. For information about the items on this screen, see Add a Phone Number Screen on page 91.




4. In the **Type** field, select the type of phone number to add, such as Home or Cell phone.
5. In the **Number** field, enter the phone number for the constituent.

6. In the **Country** field, select the country that uses the phone format you want to apply to this number.
7. You can use **Call after** and **Call before** to specify times to use the phone number to indicate the constituent's preferences, such as "call after 9:00 a.m."
8. You can use **Start date** to indicate when the number is valid.
9. Only one phone number can be marked as the primary one. If the constituent has only one phone number, the **Set as primary phone number** checkbox is selected and disabled. If there are multiple phone numbers for the constituent and this is the primary number for the constituent, select this checkbox. This number will be marked as primary and the previous number will no longer be marked as primary.
10. If the constituent requests that you not call the number, select **Do not call this phone number**.

    After you mark a number as "Do not call," you can also select a reason to explain why the number is no longer to be used, such as "Donor preference."
11. If the constituent has a household relationship, the **Copy phone number to household and members** checkbox appears. To copy the number to the record of the constituent household and its members, select this checkbox.
12. If the constituent requested that the phone is not to be shared with others outside your organization, select **This phone number is confidential**. When you mark a phone number as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the number on the Contact tab so users know not to share the information.
13. Under **Seasonal information**, enter the start date and end date to indicate when the seasonal information is valid.
14. Under **Phone source**, you can select a source for the phone number information, as well as enter any comments. For example, if the spouse of a constituent lets you know about a new phone number, you can add the number and select "Family Member" for the information source.

***Note:*** If the program automatically creates a phone number, it selects a default information source and may disable the field. For example, if the program creates a phone number based on a payment form that you create in *Web*, you cannot edit the default "Web Forms" information source.

15. Click **Save**. You return to the Contact tab.

# Add a Phone Number Screen

The table below explains the items on the Add a phone number screen. For information about how to access this screen, see Add Phone Numbers for a Constituent on page 90.

| Screen Item | Description |
|---|---|
| **Type** | Select the type of phone number for the constituent, such as Cell Phone or Home. |

| Screen Item | Description |
|---|---|
| **Number** | Enter the phone number for the constituent.<br>If phone formatting is enabled, your selection in **Country** determines how the number displays.<br>If phone formatting is disabled, enter the phone number exactly how you want it to appear in the program. |
| **Country** | If phone formatting is enabled, select the country that uses the phone format you want to apply to this number. If you do not select a country, the program uses the format of your default country. For information about how to assign a phone format to a country or designate a default country, see the *Administration Guide*.<br>If phone formatting is enabled, select the country that uses the phone format you want to apply to this number. If you do not select a country, the program uses the format of your default country. For information about how to assign a phone format to a country or designate a default country, see the Administration section of the help file. |
| **Call after** and **Call before** | You can specify times to use the phone number to indicate the constituent's preferences. A **Call after** time is a start time for the number, which indicates it is okay to call the number after the specified time. A **Call before** time is an end time, after which the number should not be called. |
| **Start date** | You can use start and end dates to indicate the period of time during which the phone number is valid. |
| **Set as primary phone number** | To designate the number as the constituent's phone number for communications, select this checkbox. By default, the first phone number you enter for a constituent is the primary number. You can enter only one primary phone number for a constituent. Under **Phone numbers** on the Contact tab, the primary number appears first. |
| **Do not call this phone number** | If the individual requests that you not use the phone number, select this checkbox. |
| **Reason** | If you select **Do not call this phone number**, this field is enabled. Select why the individual requests to not receive calls at the number, such as "Donor preference." If a phone number is no longer valid and you enter a end date for it, you may also set the number to "Do not call" with a reason of "No longer in service." |
| **Copy phone number to household and members**<br>or<br>**Update matching phone information for household** | When you add a phone number and the constituent is a member of a household with additional members, this checkbox appears. To copy the phone number to the household and its members, select this checkbox.<br>When you edit a phone number and the constituent is a member of a household, select this checkbox to update the phone number on the household members' records as well as on the household record. |

| Screen Item | Description |
|---|---|
| **This phone number is confidential** | If the constituent requested that the phone number is not to be shared with others outside your organization, select **This phone number is confidential**. When you mark a phone number as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the phone number on the Contact tab so users know not to share the information. |
| **Seasonal information** | Under **Seasonal information**, enter the start date and end date that the seasonal information is valid. |
| **Information source** and **Comments** | When you add or make changes to a phone number, you can select a source for the phone information and enter any comments. For example, if the spouse of a constituent lets you know about a change of phone number, you can make the changes and select "Family Member" for the information source.<br><br>If the program automatically creates a phone number, it selects a default information source and may disable the field. For example, if the program creates a phone number based on a payment form that you create in *Web*, you cannot edit the default "Web Forms" information source. |

# Edit a Phone Number for a Constituent

From the Contact tab of a constituent record, you can edit phone numbers as necessary.

### Edit a phone number

1. Open the record of the constituent with the phone number to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Select the number to edit and click **Edit** on the action bar. The Edit phone number screen appears. The items on this screen are the same as the Add a phone number screen. For information about the items on this screen, see Add a Phone Number Screen on page 91.

***Tip:*** You cannot enter an end date for the primary phone number of the constituent. To make a primary phone number a former phone number , you must first add and select **Set as primary phone number** for the new primary phone number .

4. Edit the information as necessary.
5. Click **Save**. You return to the Contact tab.

# Delete a Phone Number for a Constituent

From the Contact tab of a constituent record, you can delete a constituent phone number, such as when you no longer need it.

***Note:*** To preserve a record of phone number history, you can edit a phone number and add an end date to indicate the number is no longer in use.

### Delete a phone number

1. Open the record of the constituent with the phone number to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Select the number to delete and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the Contact tab. The number no longer appears.

# Manage Social Media for a Constituent

To build relationships and learn more about your constituents, you can track constituent accounts for social media services, such as *Flickr* or *Twitter*, and social networking services, such as *Facebook*, *Google+*, or *LinkedIn*. You can add information about these accounts to the contact tab on a constituent's record.

***Note:*** When you add social media accounts for a constituent, the icons for the first four accounts appear in the constituent's Contact Information constituent tile in the summary section of the constituent record. The icons are hyperlinks to the constituent's social media profile page using the URL provided in the **Profile page URL** field. A hyperlink to the profile page also appears in the Service column of the Social media accounts list on the Contact tab.

For example, if a volunteer blogs or Tweets, you can link to his social media account, so you can follow his media posts and encourage him to write about his support for your organization.

***Tip:*** If you subscribe to Social Media Finder, if you add a social media account through the constituent record Contact tab, it is automatically added to the wealth and ratings record Social Summary tab, and vice versa.

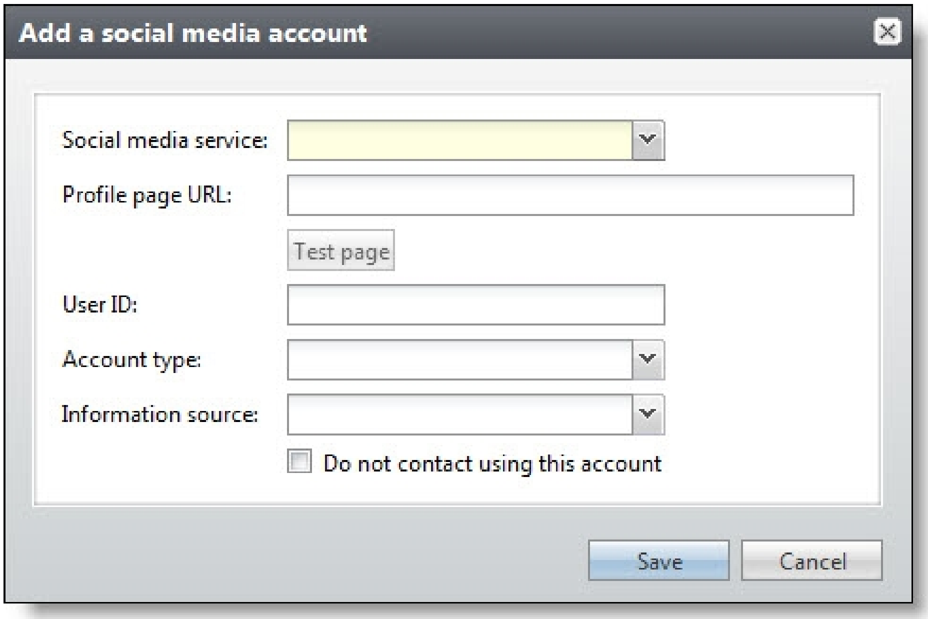
Only manually added and social media accounts from a *WealthPoint* screening that you confirm appear as icons below the profile picture on the wealth and ratings record or on the contact information tile of a constituent record.

# Add a Social Media Account for a Constituent

You can add social media and social networking service accounts to a constituent's record. You can link to a constituent's online profile to learn more about the constituent, such as relationships and interests.

### Add a social media account

1. Open the record of the constituent with the social media account to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Social media accounts**, click **Add**. The Add a social media account screen appears.




4. In the **Social media service** field, select the social media or social networking service for the account.

   For Twitter accounts, enter a handle for the account, such as @Blackbaud.

   For all other accounts, enter the URL of the constituent's profile page and the User ID for the constituent's social media account. When the user ID is part of the URL for the profile page, the program attempts to parse it automatically. Otherwise, you can enter the ID manually, though it is not required.

***Tip:*** When you view a constituent's social media or social networking profile page, you can copy the URL from your web browser's address bar. If the social media service is one that is pre-configured by Blackbaud, the program automatically enters the User ID. Blackbaud automatically pre-configures Facebook, Flickr, Google+, LinkedIn, Myspace, and Twitter.

5. To confirm the constituent's profile page URL or account name is valid, click **Test page**.

***Note:*** When you add a social media account for a constituent, the icon for the account appears in the constituent's Contact Information constituent tile in the summary section of the constituent record. Only the first four accounts appear as icons on the tile. The icon is a hyperlink to the constituent's social media profile page using the URL provided in the **Profile page URL** field. A hyperlink to the profile page also appears in the Service column of the Social media accounts list on the Contact tab.

6. In the **Account type** field, select the type of account to add, such as personal or business.
7. In the **Information source** field, select a source for the social media information.
8. If the constituent requests that you not contact the account, select **Do not contact using this account**.
9. Click **Save**. You return to the Contact tab.

## Edit a Constituent Social Media Account for a Constituent

You can edit a constituent's contact information for social media and social networking accounts. For example a constituent may have a new user name, or the URL of the constituent's blog may have changed because he switched hosting services.

### Edit a social media account

1. Open the record of the constituent with the social media account to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Social media accounts**, select the account to edit and click **Edit**. The Edit a social media account screen appears.
4. Edit the account information as necessary. For information about the items on this screen, see Add a social media account on page 94.
5. Click **Save**. You return to the Contact tab.

## Delete a Social Media Account for a Constituent

You can delete social media and social networking accounts from a constituent's record, such as when the constituent closes an account.

### Delete a social media account

You can delete social media and social networking accounts from a constituent's record.

1. Open the record of the constituent with the social media account to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Contact tab.
3. Under **Social media accounts**, select the account to delete and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the Contact tab. The social media account no longer appears.

# Personal Information

You can view and manage personal information about an individual constituent, from the Personal Info tab. This tab includes three tabs on the tier two level.

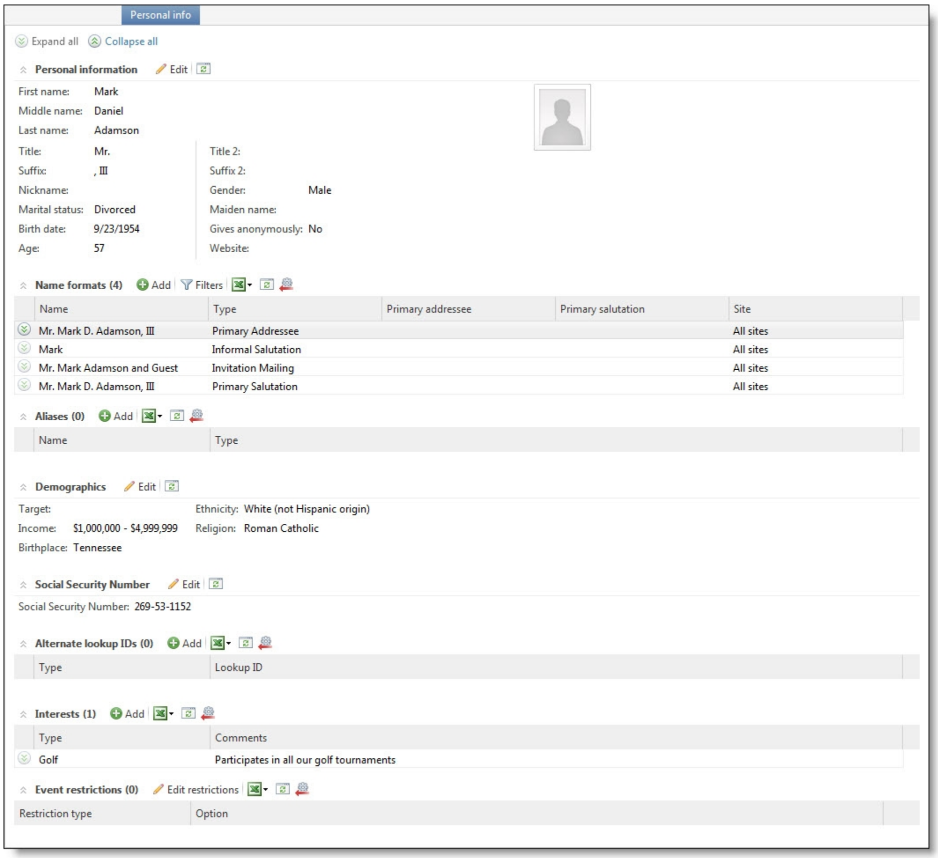
To view and edit personal information, name formats, aliases, demographics, inactive status, deceased information, Social Security number, alternate lookup IDs, and interests, click **Personal**. For information about this tab, see Personal on page 97.

To view and edit constituencies, click **Constituencies**. For information about this tab, see Constituencies on page 110.

To view and edit a constituent's education history, click **Education**. For information about this tab, see Education Information on page 117.

# Personal

To view and manage personal information about an individual constituent, select the Personal tab. You can expand and collapse the information that appears.




For constituents marked as inactive, the **Inactive details** frame appears. Under **Inactive details**, information about why the constituent was marked inactive appears. You can edit this information as necessary. For information about how to edit information about the inactive status, see Edit Status Details for an Inactive Constituent on page 99.

Under **Personal information**, information such as the constituent's name, nickname, marital status, and website address appear. From this frame, you can edit the information entered about a constituent. For information about how to edit personal information, see Edit Personal Information for an Individual Constituent on page 100.

Under **Name Formats**, information about the constituent's salutation appears. From this frame, you can add multiple addressees and salutations to use in communication with a constituent. You can also designate a name format as the primary addressee or salutation. The primary addressee is how the constituent requests to typically be addressed, such as on envelopes and labels. The primary salutation is how the constituent requests to typically be greeted in communication. For information about how to edit name formats, see Edit a Name Format for a Constituent on page 103.

Under **Aliases**, information about the constituent's aliases appears. From this frame you can edit aliases such as a former name, a stage name, an alternate name, or a nickname not captured on the Personal tab.When you search for a constituent, you can use aliases to find the correct constituent. For information about how to edit an alias, see Edit an Alias for a Constituent on page 105.

Under **Demographics**, information about the constituent’s target giving level and income appear. You can also view information about the individual’s birthplace, ethnicity, and religious preference appear. From this frame, you can edit the information entered about a constituent. For information about how to edit demographic information, see Edit Demographic Information for a Constituent on page 105.

For constituents marked as deceased, the **Deceased information** frame appears. Under **Deceased information**, information such as the date the constituent passed away and how your organization learned the constituent passed away appears. From this frame, you can edit this information as necessary. For information about how to edit the deceased information, see Edit Deceased Information for an Individual Constituent on page 106.

***Note:*** If your system administrator configures the Life Changes options so you can edit additional information about a deceased constituent, **Go to deceasing options** appears on the action bar of the **Deceased information** frame.

If you have the proper system role and security rights, the **Social Security Number** frame appears and displays the individual’s Social Security number. From this frame, you can edit this information as necessary. For information about how to edit the Social Security number, see Edit the Social Security Number for an Individual Constituent on page 106.

Under **Alternate lookup IDs**, additional lookup IDs assigned the individual appear. Alternate lookup IDs are categorized by type, so a constituent may have multiple alternate lookup IDs. However, a constituent can have only one alternate lookup ID per type. From this frame, you can manage alternate lookup IDs for the organization.

Under **Interests**, the interests of the individual appear. For example, a constituent may have an interest in women’s issues. You can add this interest to the record to remind you to include the constituent when you send invitations to events around women’s issues. From this frame, you can manage the interests entered for the organization.

## Mark a Constituent as Inactive or Active

To retain information about a constituent who no longer actively supports your organization, you can make a constituent inactive in the database. The program automatically excludes inactive constituents from constituent searches. To search for an inactive constituent, you must first select **Include inactive** on the Constituent Search screen.

After you mark a constituent as inactive, you can mark the constituent as active again if necessary. On the Personal Info tab of the constituent record, click **Mark active**. When a message appears to ask whether to mark the constituent as active, click **Yes**.

***Note:*** To configure reason codes for marking constituents inactive, from *Constituents*, under **Configuration**, click **Reason codes**.

### Mark a constituent as inactive

1. Open the record of the constituent to mark as inactive. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Personal Info tab, click **Mark inactive**. The Constituent mark inactive screen appears.
3. Select the reason code to explain the need to mark the constituent as inactive.

> ***Tip:*** To configure reason codes for inactive constituents, from *Constituents*, click **Reason codes** under **Configuration**. For information about how to configure reason codes for inactive constituents, see the *Administration Guide*.

4. In the **Details** field, enter any additional information about the inactive status of the constituent.
5. Click **Save**. You return to the constituent record.

## Edit Status Details for an Inactive Constituent

After you mark a constituent as inactive, you can edit the details of the inactive status as necessary.

### Edit inactive details

1. Open the record of the inactive constituent with the details to edit. For information about how to open a constituent record, see Constituent Search on page 61.

> ***Tip:*** To search for an inactive constituent, select **Include inactive** on the Constituent Search screen.

2. For an individual, select the Personal Info tab.

   For an Organization, select the Organization Info tab.

   For a constituent group or household, select the Details tab.
3. Under **Inactive details**, click **Edit** on the action bar. The Mark inactive screen appears.
4. Edit the reason code or details entered to explain the inactive status.
5. Click **Save**. You return to the Personal, Organization, or Details tab.

## Mark an Individual Constituent as Deceased

When an individual constituent passes away, you can mark the constituent as deceased. When you mark a constituent as deceased, you can enter information such as the deceased date. The program automatically retains the information about deceased constituents but excludes them from constituent searches. To search for a deceased constituent, you must first select **Include deceased** on the Constituent Search screen.

After you mark a constituent as deceased, you can edit the deceased date or confirmation information as necessary from the Personal Info tab.

***Note:*** If you use Blackbaud's *DeceasedRecordFinder* service and your system administrator configures the Life Changes options in *Constituents*, the program automatically marks deceased constituents as deceased and updates their constituent records.

***Note:*** Your system administrator may configure the Life Changes options so you can edit information about a deceased constituent from the Deceasing Options page.

If you accidentally or incorrectly mark a constituent as deceased, you can make a constituent marked as deceased active again.

### Mark a constituent as deceased

1. Open the record of the individual constituent to mark as deceased. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Personal Info tab, click **Mark deceased**. The Mark individual deceased screen appears.
3. In the **Deceased date** field, enter the date the constituent passed away. If you are unsure of the exact date, enter a fuzzy date such as the month and year or year only. If you do not know the date, leave the field blank.
4. In the **Confirmation** field, select how your organization confirms the constituent passed away, such as a death certificate or relative.
5. In the **Source** field, select how your organization first learns the constituent passed away, such as an obituary. Your system administrator determines the options for this field.
6. Click **Save**.
   - If your system administrator configures the Life Changes options to enable users to edit information about deceased constituents, the Deceasing Options page appears. For information about the Deceasing Options page, see Deceasing Options Page on page 37.
   - If your system administrator does not configure the Life Changes options to enable users to edit information about deceased constituents, you return to the constituent record. The **Status** field displays Deceased.

## Edit Personal Information for an Individual Constituent

When you add an individual constituent to your database, you add personal information about the constituent such as the name, personal website URL, and whether the constituent gives anonymously. From the Personal tab of the constituent record, you can add and edit this information as necessary. When you edit personal information about the constituent, you can also select an image to associate with the individual.

***Note:*** From a constituent record, to view an audit of the edits made to the record, click **History** under **More information**. The Constituent History page for the record appears. For information about the items on the Constituent History page, see Constituent History on page 217.

### Edit personal information

1. Open the record of the constituent with the information to edit. For information about how to open a constituent record, see Constituent Search on page 61.

2. Select the Personal info tab. Then click **Personal**.
3. Under **Personal information**, click **Edit** on the action bar. The Edit personal information screen appears.

***Tip:*** To access the Edit personal information screen, you can also click the picture on the constituent record and click **Edit**.

4. Edit the information as necessary. If the constituent requests to donate anonymously, select **Gives anonymously**.
5. To add an image for the constituent:
   a. In the **Image** field, click **Choose file**. The Open screen appears.
   b. Browse to and select the image file to use with the constituent.
   c. Click **Open**. You return to the Edit personal information screen. In the **Image** field, the selected image appears.

      To remove the image selected for a constituent, click **Clear file**.
6. Click **Save**. You return to the Personal tab.

## Edit Personal Information Screen

The table below explains the items on the Edit personal information screen. For information about how to access this screen, see Edit Personal Information for an Individual Constituent on page 100.

| Screen Item | Description |
|---|---|
| **Last name**, **First name**, **Middle name** | Enter the name of the individual constituent exactly as it should appear throughout your database such as on pages and reports. |
| **Maiden name** | Enter a maiden name for the individual as necessary. On the constituent record, the maiden name entered appears as an alias on the Names tab. When you search for individual constituents, you can select to include maiden names in the search criteria. |
| **Nickname** | Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria. |
| **Marital status** | Select whether the individual constituent is single, married, or divorced. |
| **Title** and **Title 2** | Select a title for the individual such as Mr., Mrs., or Ms. You can select a second title if necessary, such as “Reverend Dr.” |

| Screen Item | Description |
|---|---|
| **Suffix** and **Suffix 2** | Select a suffix for the individual such as Sr. or M.D. You can select a second suffix if necessary, such as "III Esq." |
| **Image** | This field displays an image associated with the constituent, such as a picture of the individual. To add an image for the constituent, click **Choose file**. The Open screen appears so you can browse to and select the image file to use.<br>To remove an image associated with the constituent, click **Clear file**. |
| **Gender** | Select whether the individual is a male or female. If you are unsure of the individual's gender, select "Unknown". |
| **Birth date** and **Age** | Enter the individual's date of birth, such as 10/10/1941. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed. |
| **Website** | If the constituent has a personal website or weblog, enter the web address. On the constituent record, the web address appears as a link to the website. |
| **Gives anonymously** | If the constituent requests to donate anonymously, select this checkbox. |

# Add Name Formats for a Constituent

When you add a constituent, you can add multiple addressees and salutations to use in communications with a constituent. For an individual, select the Personal Info Tab and then click **Personal**. Under **Name Formats**, you can also designate a name format as the primary addressee or salutation. The primary addressee is how the constituent requests to typically be addressed, such as on envelopes and labels. An address is often formal, such as Ms. Joan Johnson or Mr. Thomas F. Stewart. The primary salutation is how the constituent requests to typically be greeted in communication and can be formal or informal. For example, you may greet Mr. Thomas F. Stewart as Thomas Stewart or Tom.

***Tip:*** To save time, you can configure default name formats in *Marketing and Communications* **Configuration**. You can specify which name formats to add automatically to new constituent records and choose which formats to use as the default **Primary addressee** and **Primary salutation**.

## Add a name format for a constituent

1. Open the record of the constituent with the name format to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual constituent, select the Personal Info tab. Then click **Personal**.

   For an organization constituent, select the Organization Info tab. Then click **Organization**.
3. Under **Name formats**, click **Add** on the action bar. The Add name format screen appears.
4. Select the type of name format to add such as Formal Addressee or Informal Salutation.

5. Select whether to use an automatically formatted name or a custom name format.
   - To use an automatically formatted name, select the format in the grid and click **Select**.

   The **Format** field displays the order of the elements in the selected name format. The **Result** field displays how the constituent's name appears with that format.
   - To create a custom name format, select **<Custom>** in the grid and, under **Result**, enter how to display the constituent's name.
6. In the **Site** field, select the site at your organization to use the name format. To not restrict the format to a specific site, select All sites.
7. If the constituent requests to be addressed with this format on a regular basis, select **Primary addressee**.
8. If the constituent requests to be greeted with this format on a regular basis, select **Primary salutation**.

***Note:*** A constituent can have only one primary addressee and primary salutation. When you include the constituent in communication, the program automatically uses the primary addressee and salutation.

9. Click **Save**. You return to the Personal or Organization tab.

# Edit a Name Format for a Constituent

After you add a name format for a constituent, you can edit it as necessary.

### Edit a name format for a constituent

1. Open the record of the constituent with the name format to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual constituent, select the Personal Info tab. Then click Personal.

   For an organization constituent, select the Organization info tab. Then click Organization.
3. Under **Name formats**, select the name format to edit.
4. On the action bar, click **Edit**. The Edit name format screen appears. The items on this screen are the same as the Add name format screen. For information about the items on this screen, see Add Name Formats for a Constituent on page 102.
5. Edit the name format as necessary.
6. Click **Save**. You return to the Person or Organization tab.

# Delete a Name Format for a Constituent

You can delete a name format from a constituent as necessary.

### Delete a name format for a constituent

1. Open the record of the constituent with the name format to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual constituent, select the Personal Info tab. Then click **Personal**

   For an organization constituent, select the Organization Info tab. Then click **Organization**.
3. Under **Name formats**, select the name format to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the name format.
5. Click **Yes**. You return to the Personal or Organization tab. Under **Name formats**, the format no longer appears.

## Add an Alias for a Constituent

From the Personal tab of a constituent record, you can add multiple aliases for a constituent. When you search for a constituent, you can use aliases to find the correct constituent. For an individual constituent, an alias can be a former name, a stage name, an alternate name, or a nickname not captured on the Personal tab. For an organization constituent, an alias can be an acronym or a name by which the organization is commonly called in the community.

### Add an alias

1. Open the record of the constituent with the alias to add.
2. For an individual constituent, select the Personal Info tab. Then click **Personal**.

   For an organization constituent, select the Organization Info tab. Then click **Organization**.
3. Under **Aliases**, click **Add**. The Add alias screen appears.
4. Select the type of alias to add for the person, such as Former Last Name for an individual or Acronym for an organization.
5. Enter the alias in the name fields.
6. Click **Save**. You return to the Personal or Organization tab.

## Add Alias Screen

| Screen Item | Description |
| --- | --- |
| **Type** | Select the type of alias to add. For an individual, an alias can be a former last name, pen name, or alternate nickname. For an organization, an alias can be an acronym or alternate name. |
| Name fields | For an individual constituent, all name fields appear, such as first name, middle name, and last name, as well as titles and suffixes. Organizations have just one name field to use for an alias. When you search for a constituent, you can select Include aliases to include them in the search. |

# Edit an Alias for a Constituent

From the Personal tab of a constituent record, you can edit aliases as necessary.

### Edit an alias

1. Open the record of the constituent with the alias to edit.
2. For an individual constituent, select the Personal Info tab. Then click **Personal**.

   For an organization constituent, select the Organization Info tab. Then click **Organization**.
3. Under **Aliases**, select the alias to edit.
4. On the action bar, click **Edit**. The Edit alias screen appears. The items on this screen are the same as the Add alias screen.
5. Edit the information as necessary.
6. Click **Save**. You return to the Personal or Organization tab.

# Delete an Alias for a Constituent

From the Personal tab of a constituent record, you can delete an alias when necessary.

### Delete an alias

1. Open the record of the constituent with the alias to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual constituent, select the Personal Info tab. Then click **Personal**.

   For an organization constituent, select the Organization Info tab. Then click **Organization**.
3. Under **Aliases**, select the alias to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the alias.
5. Click **Yes**. You return to the Personal or Organization tab. Under **Aliases**, the alias no longer appears.

# Edit Demographic Information for a Constituent

You can enter demographic information about a constituent, such as income level. For an individual constituent, you can also enter information such as birthplace, ethnicity, and religion.

### Edit demographic information

1. Open the record of the constituent with the demographic information to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

   For an organization, select the Organization Info tab. Then click **Organization**.

For a constituent group or household, select the Details tab.

3. Under **Demographics**, click **Edit** on the action bar. The Edit demographics screen appears.
4. In the **Target** and **Income** fields, select the target giving level and estimated income for the constituent.
5. For an individual constituent, enter the birthplace and select the ethnicity and religious preference as necessary.
6. Click **Save**. You return to the constituent record.

# Edit Deceased Information for an Individual Constituent

After you mark a constituent as deceased, you can edit the deceased information as necessary.

***Tip:*** If your system administrator configures the Life Changes options in *Administration* to allow users to edit information about a deceased constituent, you can edit additional information about the deceased constituent from the Deceasing Options page. For information about the Deceasing Options page, see Deceasing Options Page on page 37.

### Edit deceased information

1. Open the record of the deceased constituent with information to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Personal**.
3. Under **Deceased information**, click **Edit** on the action bar. The Edit deceased information screen appears. The items on this screen are the same as the Mark individual deceased screen. For information about items on this screen, see Mark an Individual Constituent as Deceased on page 242.
4. Edit the information as necessary.
5. Click **Save**. You return to the Personal tab.

# Edit the Social Security Number for an Individual Constituent

From the Personal tab of the constituent record, you can enter and edit the Social Security number for the individual.

### Edit the Social Security number

1. Open the record of the constituent with the Social Security number to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Personal**.
3. Under **Social Security Number**, click **Edit** on the action bar. The Edit Social Security Number screen appears.
4. Enter the Social Security number exactly as it should appear in the database, such as 111 00 1111 or 111-00-1111.

5. Click **Save**. You return to the Personal tab.

# Add Alternate Lookup IDs for a Constituent

When you add a constituent record, the program automatically assigns the constituent a lookup ID. This primary lookup ID appears in the **Lookup ID** field on the constituent record. You can manually assign additional lookup IDs to a constituent record.

### Add an alternate lookup ID

1. Open the record of the constituent with the alternate lookup ID to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.
3. For an organization, select the Organization Info tab. Then click **Organization**.
4. For a constituent group or household, select the Details tab.
5. Under **Alternate lookup IDs**, click **Add** on the action bar. The Add an alternate lookup ID screen appears.
6. In the **Type** field, select the type of alternate lookup ID to add.
7. In the **Lookup ID** field, enter the new alternate lookup ID.

   ***Note:*** You cannot enter two lookup IDs of the same type with the same ID number. You can enter multiple alternate lookup IDs of the same type for one record, as long as the alternate IDs do not match.
8. Click **Save**. You return to the constituent record. Under **Alternate lookup IDs**, the new lookup ID appears.

# Edit an Alternate Lookup ID

After you add an alternate lookup ID for a constituent, you can edit it or its type as necessary.

***Note:*** This procedure explains how to edit an alternate lookup ID assigned to a constituent by an application user. For information about how to edit the primary lookup ID assigned to a constituent by the program when you add the constituent record, see Edit the Primary Lookup ID for a Constituent on page 68.

### Edit an alternate lookup ID

1. Open the record of the constituent with the alternate lookup ID to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

   For an organization, select the Organization Info tab. Then click **Organization**.

   For a constituent group or household, select the Details tab.
3. Under **Alternate lookup IDs**, select the lookup ID to edit.

4. On the action bar, click **Edit**. The Edit alternate lookup ID screen appears. The items on this screen are the same as the Add an alternate lookup ID screen. For information about the items on this screen, see Add Alternate Lookup IDs for a Constituent on page 107.
5. Edit the information as necessary.
6. Click **Save**. You return to the constituent record.

# Delete an Alternate Lookup ID

After you add an alternate lookup ID for a constituent, you can delete it, such as if your organization no longer uses its type of lookup ID.

## Delete an alternate lookup ID

1. Open the record of the constituent with the alternate lookup ID to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

   For an organization, select the Organization Info tab. Then click **Organ**iz**ation**.

   For a constituent group or household, select the Details tab.
3. Under **Alternate lookup IDs**, select the lookup ID to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the lookup ID.
5. Click **Yes**. You return to the constituent record.

# Add Interests for a Constituent

To improve your ability to target donors, you can add interests for a constituent. For example, a constituent may have an interest in women’s issues. You can add this interest to the record as a reminder to include the constituent when you send invitations to events around women’s issues.

***Tip:*** From*Analysis*, you can create a query to generate a selection of constituents that share the same interest.

## Add an interest for a constituent

1. Open the record of the constituent with the interest to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

   For an organization, select the Organization Info tab. Then click **Organ**iz**ation**.

   For a constituent group or household, select the Details tab.
3. Under **Interests**, click **Add** on the action bar. The Add interest screen appears. For information about the items on this screen, see Add Interest Screen on page 109.
4. In the **Type** field, select the type of interest to add.
5. In the **Comments** field, enter any additional information or detail about the interest.

6. Click **Save**. You return to the constituent record. Under **Interests**, the new interest and any comments entered appear.

## Add Interest Screen

| Screen Item | Description |
|---|---|
| **Type** | Select the type of interest the constituent has, such as Golf, Volunteering, or Wine tasting. Interests can include hobbies, travel, technology, and specific issues. |
| **Comments** | Enter any additional notes or information about the constituent interest. For example, if a constituent is interested in wine tasting, enter a reminder to include the constituent when you send invitations to your next wine auction. |

# Edit an Interest for a Constituent

After you add an interest for a constituent, you can edit its type or comments entered about the interest as necessary.

### Edit an interest

1. Open the record of the constituent with the interest to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

   For an organization, select the Organization Info tab. Then click **Organization**.

   For a constituent group or household, select the Details tab.
3. Under **Interests**, select the interest to edit.
4. On the action bar, click **Edit**. The Edit interest screen appears. The items on this screen are the same as the Add interest screen. For information about the items on this screen, see Add Interest Screen on page 109.
5. Edit the information as necessary.
6. Click **Save**. You return to the constituent record.

# Delete an Interest for a Constituent

After you add an interest for a constituent, you can delete it as necessary.

### Delete an interest

1. Open the record of the constituent with the interest to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. For an individual, select the Personal Info tab. Then click **Personal**.

For an organization, select the Organization Info tab. Then click **Organization**.

For a constituent group or household, select the Details tab.

3. On the action bar, click **Delete**. A message appears to ask whether to delete the interest.
4. Click **Yes**. You return to the constituent record.

# Edit Event Restrictions for a Constituent

You can track a constituent's dietary, physical, or other restrictions so you can properly accommodate them for events. For example, if a constituent prefers a vegetarian diet, you can track this restriction so they are served proper food.

***Note:*** Any restrictions you add on the constituent record also appear on the constituent's registrant record.

### Edit event restrictions

1. Open the record of the constituent with the event restrictions to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Personal**.
3. Under **Event restrictions**, click **Edit constituent default restrictions**. The Constituent default restrictions screen appears.
4. Select the necessary restriction types and options such as a restriction type of Dietary, and an Option of Vegetarian.

   ***Note:*** If a restriction type or option that you need does not appear, you must configure a new one. For information about how to configure restriction types, see the *Events Guide*.
5. Click **Save**. You return to the constituent record.

# Constituencies

Constituencies define the affiliations your constituents have with your organization. A constituent can have multiple constituencies, and these relationships can start and end and overlap. For example, a constituent may first become a donor in your database and remain a donor for an undetermined length of time. The constituent may later become a volunteer for your organization, but for only six months. You can use constituencies to define these relationships and group similar constituents in queries, mailings, and reports. To view the constituencies of a constituent, select the Constituencies tab.

Under **Constituencies**, the constituencies of the constituent appear. The program may automatically add a constituency to a constituent, such as volunteer. For information about the constituencies that may appear, see Constituency Types on page 112.

***Note:*** If you add a constituent group as a committee, the constituency of Committee appears.

From the **Constituencies** grid, you can add and manage the constituencies for a constituent.

Your organization may assign a fundraiser to maintain your organization's relationship with a constituent. Under **Constituent relationship managers**, you can view the fundraisers assigned to the constituent. When a user edits the contact information on a constituent record, a relationship manager can view the changes made. From the grid, you can add and manage the fundraisers who maintain the relationship with the constituent and view changes to the constituent record.

# Add Constituencies for a Constituent

On the Constituencies tab, you can add constituencies already defined in the program, such as Board Member or Staff, to a constituent. You can also add constituencies defined by your organization such as Friend or Trustee.

### Add a constituency

1. Open the record of the constituent with the constituency to add. For information about how to open a constituent record, see Constituent Search on page 61.

- For individuals, select the Personal Info tab.
- For organizations, select the Organization Info tab.
- For groups/households, select the Details tab.

2. Then select the Constituencies tab.
3. Under **Constituencies**, click **Add** and select the type of constituency o apply to the constituent. To add a constituency defined by your organization, select User-defined. The Add constituency screen appears.
4. For a user-defined constituency, select the type of constituency to add.
5. Enter the start and end dates of the constituency. If the duration of the constituency is undetermined, leave the **Date to** field blank.
6. Click **Save**. You return to the Constituencies tab.

## Add Constituency Screen

| Screen Item | Description |
|---|---|
| **Constituency** | This field appears for a user-defined constituency only. Select the type of constituency to assign to the constituent. The constituency defines why the constituent is in your database and the affiliation with your organization. |
| **Date from** | Enter the date the constituency begins. |
| **Date to** | Enter the date the constituency ends. If the duration of the constituency is undetermined, leave this field blank. |

# Edit a Constituency

After you add a constituency to a constituent, you can edit it as necessary. For example, you can edit the duration of the constituency.

***Note:*** You can edit only constituencies added through the **Constituencies** grid. You cannot edit constituencies the program automatically assigns to a constituent, such as Donor.

### Edit a constituency

1. Open the record of the constituent with the constituency to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Constituencies**.
3. Under **Constituencies**, select the constituency to edit.
4. On the action bar, click **Edit**. The Edit Constituency screen appears. The items on this screen are the same as the Add Constituency screen. For information about the items on this screen, see Add Constituency Screen on page 111.
5. Edit the information as necessary.
6. Click **Save**. You return to the Constituencies tab.

# Delete a Constituency

You can delete a constituency from a constituent when necessary. From the **Constituencies** grid, you can delete the constituencies added from the action bar. You cannot delete constituencies the program automatically assigns to a constituent, such as Donor.

***Tip:*** To retain a historical record of the constituency, you can edit its end date to indicate the constituency is no longer active rather than delete the constituency. For information about how to edit a constituency, see Edit a Constituency on page 112.

### Delete a constituency

1. Open the record of the constituent with the constituency to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Constituencies**.
3. Under **Constituencies**, select the constituency to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the constituency.
5. Click **Yes**. You return to the Constituencies tab.

# Constituency Types

There are several default constituency types which the program may automatically add to a constituent. However, you can also manually add many constituencies to a constituent under

Constituencies on the Personal Info tab. Constituencies also appear under **Active constituencies** in the summary of a constituent record and are sometimes a link to additional information about the constituent.

***Note:*** To add user defined constituency types, from *Administration*, click **Code tables**. Under the **Biographical** category, click **Constituency** under **Code table name** column. The Manage Code Table Entries page appears where you can manage your constituency types.

| Constituency | Description |
|---|---|
| **Alumnus** | If you are an educational organization, you designate an educational institution as affiliated in *Administration*. Then, when you select a status of “Graduated” for a constituent, this constituency appears under **Active constituencies** on the constituent record. |
| **Bank** | The "Bank" constituency is automatically added to any organization constituent you have set up as a bank in **Manage bank accounts** or **Bank search** in *Treasury*. You cannot manually add this constituency, but you can manually delete this constituency if it no longer applies or was added by mistake. |
| **Board member** | Under Constituencies on the Personal Info tab, you can add this constituency to a constituent and enter start and end dates. When you add the constituency, it appears under **Active constituencies** on the constituent record.<br><br>When the end date of the board membership occurs in the past, the constituent no longer has this constituency. |
| **Committee** | When you add a committee, you actually add a group with this constituency type. Committee groups have all of the group functionality, but can optionally also be event coordinators and solicitors. On the group page for a committee, you can manage the basics for the group, such as group membership. On the Committee page for the group, you can view and manage details about the committee. |
| **Committee member** | When you add a constituent to a committee, the constituent is assigned this constituency. When the end date of the committee membership occurs in the past, the constituent no longer has this constituency. |
| **Donor** | The criteria for the Donor constituency is established by the **Constituencies** task under **Configuration** in *Constituents*. The constituency appears on a constituent when the constituent meets the criteria established. When a donor no longer meets the criteria, the constituency is removed from the record.<br><br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Event registrant** | When a constituent is registered for an event, the constituent receives the event registrant constituency. |

| Constituency | Description |
|---|---|
| **Fundraiser** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a fundraiser in *Prospects*, the program automatically adds this constituency to the constituent record. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Grantor** | The "Grantor" constituency is automatically added to any constituent you have set up as a grantor in *Foundations*. You cannot manually add this constituency to a record, but you can manually delete this constituency if it no longer applies or was added by mistake. |
| **Loyal donor** | A constituent receives the "Loyal donor" constituency when the constituent meets the **Loyal donor definition** criteria set up in the **Constituencies** configuration task in *Constituents*. When a donor no longer meets the criteria, the constituency is removed from the record.<br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Major donor** | A constituent receives the "Major donor" constituency when the constituent meets the **Major donor definition** criteria set up in the **Constituencies** configuration task in *Constituents*. When a donor no longer meets the criteria, the constituency is removed from the record.<br>***Note:*** If a constituent with a "Donor" constituency gives a large gift and receives the "Major donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. In addition, if a donor qualifies for the "Loyal donor" constituency, the "Donor" constituency is no longer displayed in the summary section of the constituent record. The "Donor" constituency still appears under Constituencies on the Personal Info tab. |
| **Major giving prospect** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a prospect in *Prospects*, the program automatically adds this constituency to the constituent record. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Matching gift organization** | The "Matching gift organization" constituency is automatically added to organization records who are identified as matching gift organizations through the MatchFinder Online service which can be configured in *Revenue*. You cannot manually add this constituency to a record, but you can manually delete this constituency if it no longer applies or was added by mistake. |

| Constituency | Description |
|---|---|
| **Member** | When you add an active membership to a constituent, the program automatically adds this constituency to the constituent. You can also manually add this constituency to a constituent and enter start and end dates.<br><br>When the membership expires, the constituent no longer has this constituency. |
| **Planned giver** | When you add a constituent as a major giving prospect in *Prospects*, you can then add planned gifts for the constituent. When a planned gift is marked as accepted or matured and has a designation and designation amount, the program automatically adds this constituency to the constituent record. |
| **Recognized donor** | When you include a constituent in a recognition program, the program automatically adds this constituency to the constituent record when you run the recognition process. |
| **Relation only** | When you add the constituent as a relationship of another constituent and there is no other constituency assigned, the program automatically adds this constituency to the constituent record.<br><br>When another constituency is added to the constituent, either manually or by the program, the "Relation only" constituency is removed. |
| **Sponsor** | When you add a constituent as a sponsor in *Sponsorship*, the program automatically adds this constituency to the constituent record. When the sponsorship is no longer active, the constituency is automatically removed from the constituent. |
| **Sponsorship donor** | When you add a constituent as a sponsor in *Sponsorship* and the sponsor is making a gift of sponsorship, the program automatically adds this constituency to the constituent record. |
| **Sponsorship recipient** | When a constituent makes a gift of sponsorship in *Sponsorship*, the program automatically adds this constituency to the gift recipient's constituent record. |
| **Staff** | You can add this constituency to a constituent and enter start and end dates. When the end date occurs in the past, the constituent no longer has this constituency. |
| **Student** | If you are an educational organization, you designate an educational institution as affiliated in *Administration*. When you select a status of "Currently attending" or "Incomplete" on the primary education history record of an individual constituent, this constituency appears on the constituent record. |
| **Vendor** | When you add a constituent as a vendor and associate the vendor with event expenses, the program automatically adds this constituency to the constituent record. |
| **Volunteer** | You can add this constituency to a constituent and enter start and end dates. When you add a constituent as a volunteer in *Volunteers*, the program automatically adds this constituency to the constituent record.<br><br>When the end date occurs in the past, the constituency is automatically removed from the constituent record. |

# Add Constituent Relationship Managers

Your organization may add a fundraiser as a relationship manager to maintain your relationship with a constituent. Fundraisers are constituents with the Fundraiser constituency assigned to their constituent records. You can assign multiple relationship managers to a constituent. When a user edits the contact information on a constituent record, the relationship managers can view the changes made. For information about how to view changes made to constituent contact information, see Constituent Data Review on page 223.

***Tip:*** To assign a relationship manager to multiple constituents, you can create a global change instance to add the manager to the selection of constituents. For information about Global Changes, see the *Administration Guide*.

### Add a relationship manager to a constituent

1. Open the record of the constituent to assign to the relationship manager. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Constituencies**.
3. Under **Constituent relationship managers**, click **Add** on the action bar. The Add relationship manager screen appears.
4. Search for and select the fundraiser to assign as the constituent relationship manager. Fundraisers are constituents with the Fundraiser constituency assigned to their constituent records.
5. Click **Save**. You return to the Constituencies tab.

# Edit a Constituent Relationship Manager

After you assign a relationship manager to a constituent, you can edit the assignment to assign the constituent to another relationship manager.

***Tip:*** To edit the relationship manager assigned to multiple constituents to another fundraiser, you can create a global change instance to change the manager for the selection of constituents. For information about Global Changes, see the *Administration Guide*.

### Edit a constituent relationship manager

1. Open the record of the constituent with the relationship manager to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Constituencies**.
3. Under **Constituent relationship managers**, click **Edit** on the action bar. The Edit relationship manager screen appears.
4. Search for and select the fundraiser to assign as the constituent relationship manager.
5. Click **Save**. You return to the Constituencies tab.

## Delete a Constituent Relationship Manager

After you assign a relationship manager to a constituent, you can delete the assignment as necessary.

***Tip:*** To remove the relationship manager assigned to multiple constituents, you can create a global change instance to change the manager for the selection of constituents. For information about Global Change, see the *Administration Guide*.

### Delete a constituent relationship manager

1. Open the record of the constituent with the relationship manager to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Personal Info tab. Then click **Constituencies**.
3. Under **Constituent relationship managers**, click **Delete** on the action bar. A message appears to ask whether to delete the relationship manager.
4. Click **Yes**. You return to the Constituencies tab.

# Education Information

From an individual constituent's record, you can view the constituent's education history on the Education tab.

Under **Education**, you can view the education institutions and programs the constituent attends or has attended in the past. For each educational institution, you can view the date attended, degree received, class year, program, and educational status. You can also view whether the program is the primary education for alumni information. Typically, the most recent program attended is the primary education for the constituent.

To view additional information about the constituent’s history with the program, see EducationRecord on page 119.

Under **Education**, you can manage the education history for the constituent.

Under **Involvement**, you can view any educational activities or honors the constituent has involvement with. For each activity, you can view its type, position held, name, and date range. You can also view any comments entered about the involvement, the institution affiliated with the involvement, and any awards received as a result of the involvement. From the grid, you can manage the educational involvement of the constituent.

## Add Education History for an Individual Constituent

You can add education history for an individual’s record, such as the primary schools, universities, and other education institutions attended.

### Add education history

1. Open the record with the education history to add.

2. Select the Education tab and click **Add**.
3. To designate the education program being added as the primary education for the individual, select **Primary education information**. If this is the first education history record for the constituent, it will be marked as primary automatically if the educational institution is marked as affiliated in the Educational Catalog in *Administration*.
4. In the **Educational institution** field, select the institution that the individual attends or attended.

***Note:*** If you are an educational organization with an affiliation with the institution selected in the **Educational institution** field, an asterisk appears next to the institution name.

5. In the **Program** field, select the program the individual attended at the institution, such as Undergraduate.
6. In the **From** and **To** fields, select the dates the individual attended the selected program at the institution.
7. In the **Status** field, select the educational status of the individual at the institution, such as “Currently attending” or “Graduated”. If you are unsure of the status, select “Unknown”.

   Depending on the status selected, enter additional information about the educational status, such as the date the individual graduated, the level achieved, or the reason for an unknown status.
8. In the **Degree** and **Honor awarded** fields, select the degree of the program attended, such as BA or PhD, and whether the individual received the degree at the institution.
9. In the **Class of** field, enter the actual class year for the individual at the institution.

   If the individual identifies with a graduating class different than the actual class year, in the **Preferred class of** field, enter the preferred class year for the individual.
10. In the **Information source** and **Source date** fields, select the source for the education information and the date you receive it.
11. In the **Comments** field, enter any additional information about the individual’s history at the educational institution.
12. Under **Graduation information**, if the individual graduated, enter the date, the individual’s class, and the class with which the individual prefers to identify. For example, the individual be assigned a different class than her peers because of a late or early graduation. But the individual may prefer to list the same class as her peers.
13. Under **Additional information**, enter information about the education history, such as the college or school attended at the institution, department, or degree type.
14. Click **Save**. You return to the Education tab. Under **Education**, the new education history appears.

# Add Educational Involvement for an Individual Constituent

You can add involvements records to track information about activities associated with an individual’s education history, such as athletic programs, social organizations, special programs, or academic honors.

### Add an educational involvement

1. Open the record of the individual with the educational involvement to add.
2. On the Education tab, under **Involvement**, click **Add**. The Add educational involvement screen appears.
3. In the **Type** field, select the type of involvement to add, such as "Athletics" or "Study Abroad Program."
4. In the **Name** field, select the name of the involvement.
5. Enter the date range, if known, in which the individual participated in the involvement.
6. In the **Educational institution**, select the educational institution. The educational institutions available are those for which the individual has an education record.
7. If the educational institution is affiliated with your organization, you can select the program, college or school, division, department, and sub department to associate with this involvement. The information available in these fields is based on the academic catalog set up for educational institution in *Administration*. If the educational institution is not affiliated with your organization, you can enter or select whichever program, college/school, and department information is applicable.
8. In the **Position** field, enter the position held.
9. In the **Award** field, select any special recognition or award the individual received associated with the involvement.
10. In the **Notes** field, enter any additional information about the involvement.
11. Click **Save**. You return to the Education tab.

# EducationRecord

From a constituent's record, you can view a summary of an individual's history with the program.

At the top of the record, information about the individual appears, including address, active constituencies, and inactive status. You can also view the individual’s history with the educational information. To edit the education history information, click **Edit education** under **Tasks**. The Edit education history screen appears.

If your organization sets up educational history attributes, the **Attributes** grid appears. In this grid, you can view any attributes associated with the education record. Educational attributes help identify the individual’s educational interests or experience. For example, you can use education attributes to record scholarships, extracurricular activities, awards, committees, and hobbies.

Under **Attributes**, you can manage the educational attributes for the individual associated with the education history.

- Add Attributes to the Education History of an Individual Constituent on page 120

## Add Attributes to the Education History of an Individual Constituent

You can add education history about the individual that are associated with an education record. Educational attributes help identify the individual’s educational interests or experience. For example, you can use education attributes to record scholarships, extracurricular activities, awards, committees, and hobbies.

## Student and Alumnus Page

If your organization is affiliated with an educational institution, you can view constituents as students and alumni. You set up affiliated educational institutions through the **Education catalog** in *Administration*.

On the student or alumnus view of a constituent, you can manage the affiliated education information. This information can also be viewed from the Education tab of the constituent. For more information, see Education Information on page 117.

On the student or alumnus view of a constituent, you can also view scholarship information. If the constituent is designated as the recipient of a fundraising purpose, the information appears on the Scholarship tab of the student or alumnus page.

- Scholarships and Funds Received on page 120

## Scholarships and Funds Received

Students and alumni of your affiliated educational institution may receive scholarship funds. If a student or alumnus is the recipient of a fundraising purpose, the information appears on the Scholarship tab of the student or alumnus page.

Constituents can also receive funds for reasons other than scholarships. You can add this information on the Recipients tab of a fundraising purpose. Once a constituent is a recipient of funds, you can access the Funds Received page for the constituent.

# Organization Information

To view and manage information about an organization constituent, select the Organization tab.

Under **Organization details**, information such as the constituent’s name, industry, number of employees and subsidiary organizations, and website address appear. From this frame, you can edit the information entered about the organization.

Under **Name Formats**, information about the constituent's salutation appears. From this frame, you can add multiple addressees and salutations to use in communication with a constituent. You can also designate a name format as the primary addressee or salutation. The primary addressee is how the constituent requests to typically be addressed, such as on envelopes and labels. The primary salutation is how the constituent requests to typically be greeted in communication.

Under **Aliases**, information about the constituent's aliases appear. From this frame you can edit aliases such as a former name, an alternate name, or a nickname not captured on the Organization tab.When you search for a constituent, you can use aliases to find the correct constituent

Under **Demographics**, information about the constituent's target giving level and income appear. From this frame, you can edit the information entered about a constituent. For information about how to edit demographic information, see Edit Demographic Information for a Constituent on page 105.

Under **Matching gift conditions**, information about the organization's matching gift policies appear, such as the minimum and maximum matching factors and any notes entered. An organization can have multiple levels of matching gift details. From this frame, you can manage matching gift conditions for the organization.

Under **Alternate lookup IDs**, additional lookup IDs assigned the organization appear. Alternate lookup IDs are categorized by type, so a constituent may have multiple alternate lookup IDs. However, a constituent can have only one alternate lookup ID per type. From this frame, you can manage alternate lookup IDs for the organization.

Under **Interests**, the interests of the organization appear. For example, a constituent may have an interest in women's issues. You can add this interest to the record to remind you to include the constituent when you send invitations to events around women's issues. From this frame, you can manage the interests entered for the organization.

For constituents marked as inactive, the **Inactive details** frame appears. Under **Inactive details**, information about why the constituent was marked inactive appears. You can edit this information as necessary. For information about how to edit information about the inactive status, see Edit Status Details for an Inactive Constituent on page 99.

To manage an organization's constituencies and constituent relationship managers, select the Constituencies tab from the Organization Info tab. For more information, see Constituencies on page 110.

# Edit Details for an Organization Constituent

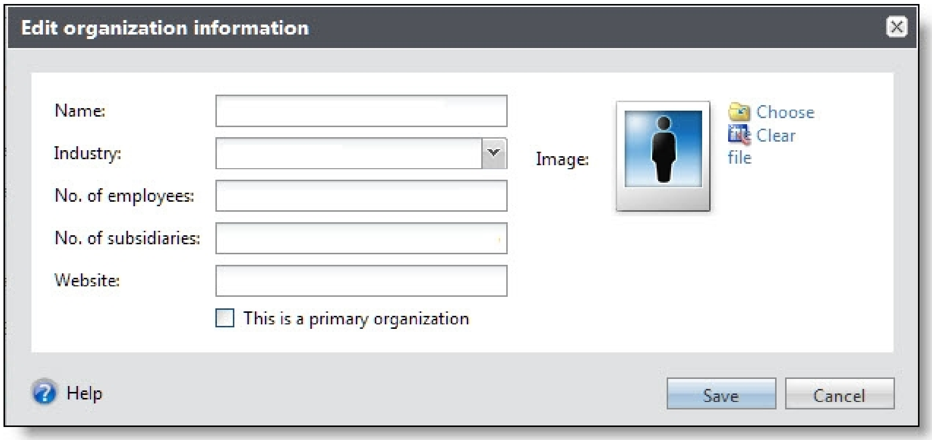
After you add an organization to your database, you can edit the detail information about the organization, such as name, industry, and website URL as necessary.

***Note:*** From a constituent record, to view an audit of the edits made to the record, click **History** under **More information**. The Constituent History page for the record appears. For information about the items on the Constituent History page, see Constituent History on page 217.

## Edit detail information about an organization

1. Open the record of the organization constituent with the detail information to edit. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Organization tab.
3. Under **Organization details**, click **Edit** on the action bar. The Edit organization details screen appears. For information about the items on this screen, see Edit Organization Details Screen on page 122.

***Tip:*** To access the Edit organization information screen, you can also click the picture on the constituent record and click **Edit**.




4. Edit the information as necessary.
5. To add an image for the constituent:
   a. In the **Image** field, click **Choose file**. The Open screen appears.
   b. Browse to and select the image file to use with the constituent.
   c. Click **Open**. You return to the Edit organization details screen. In the **Image** field, the selected image appears.

      To remove the image selected for a constituent, click **Clear file**.
6. Click **Save**. You return to the Organization tab.

# Edit Organization Details Screen

The table below explains the items on the Edit organization details screen. For information about how to access this screen, see Edit Details for an Organization Constituent on page 121.

| Screen Item | Description |
|---|---|
| **Name** | Enter the name of the organization, exactly as it should appear throughout the program. |
| **Industry** | Select the organization's type of industry such as Health care or Education. |
| **No. of employees** | Enter the number of people employed at the organization. |
| **No. of subsidiary orgs** | If the organization is the parent of another organization, enter the number of companies the organization owns and controls. |
| **Website** | Enter the address to the organization's corporate website. On the constituent record, the address entered appears as a link to the organization's website. |

| Screen Item | Description |
|---|---|
| **This is a primary organization** | If the location entered is the main headquarters or office of operation for the organization, select this checkbox.<br>When you search for an organization, you can select to include only primary organizations in the search results. |
| **Image** | To add an image for the organization such as the company logo, click **Choose file**. The Open screen appears so you can browse to and select the image file to use.<br>To remove an image associated with the constituent, click **Clear file**. |

# Add Matching Gift Conditions for an Organization

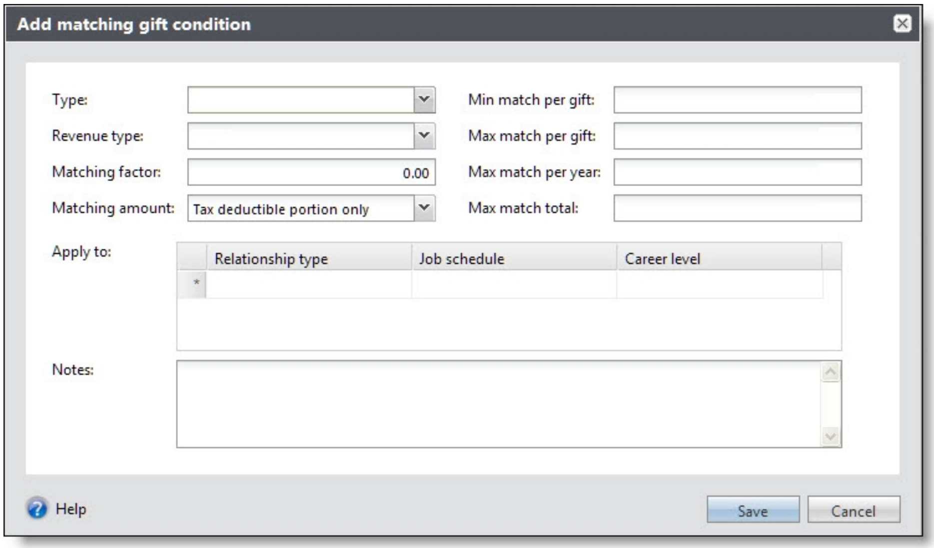
Many organizations match contributions their employees or other qualified persons give to approved nonprofit organizations. For example, AAA Concrete matches employee gifts on a two-to-one ratio. Kyle Bell, an employee of AAA Concrete, donates $100 to your organization. Because AAA Concrete matches employee gifts, your organization receives an additional $200 from AAA Concrete if Kyle's gift meets the conditions set by AAA Concrete.

Matching gifts can be very important when you work with revenue. To increase your organization's total donations, we recommend you research and track each organization's matching gift conditions. On the Organization tab, you can add the matching gift conditions for an organization constituent. An organization that matches gifts may have several types of matching gift conditions, and the details for each type may differ. For example, the organization may match on a three-to-one ratio for donations from an executive and on a two-to-one ratio for donations from a full-time employee.

After you add matching gift conditions for an organization, the program considers it a matching organization. When you add an individual relationship for an organization or an organization relationship for an individual, you can select whether the organization matches the donations of the individual. For more information about how to add relationships, see Relationships on page 128.

### Add a matching gift condition for an organization constituent

1. Open the record of the organization constituent with the matching gift condition to add. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Organization tab.
3. Under **Matching gift conditions**, click **Add** on the action bar. The Add matching gift condition screen appears. For information about the items on this screen, see Add Matching Gift Condition Screen on page 125.




4. In the **Type** field, select the type of matching gift condition to add such as Employee.
5. Select the type of revenue eligible to qualify for the matching gift condition.
6. In the **Matching factor** field, enter the ratio by which the organization matches donations from the selected relationships.
7. In the **Matching amount** field, select whether the organization matches the full amount of the donation or only the tax-deductible portion as reflected on the receipt.
8. In the **Min match per gift** and **Max match per gift** fields, enter the minimum and maximum amounts of matching gifts the organization provides. For example, the organization may only provide matching gifts between $25 and $1,000. If the organization does not have a minimum or maximum matching gift amount, leave the field blank.
9. In the **Max match per year** and **Max match total** fields, enter the maximum amounts of a constituent's annual and lifetime giving the organization matches. For example, the organization may match no more than $10,000 annually or $100,000 for the lifetime of the constituent.
10. In the **Apply to** grid, select the relationship types for which the matching gift condition applies.
11. For each selected relationship type, select whether the matching gift condition applies to a specific schedule, such as Full time or Part time, or career level, such as Executive.

***Note:*** You can use relationship type, job schedule, and career level together to make conditions as specific as necessary. If you use only relationship types, your condition is broadest. For example, if you select Employee as the relationship type, gifts from all employees at the organization are eligible, based on the other conditions. If you select a relationship type of Employee and a job schedule of Full time, then gifts from part time or temporary employees are not eligible.

12. Under **Notes**, enter any additional information about the organization's matching gift program.
13. Click **Save**. You return to the Organization tab.

# Add Matching Gift Condition Screen

The table below explains the items on the Add matching gift condition screen. For information about how to access this screen, see Add Matching Gift Conditions for an Organization on page 123.

| Screen Item | Description |
|---|---|
| **Type** | Select the type of matching gift condition. An organization may have multiple condition types, and the details for each may differ. For example, an organization may match two-to-one for donations from employees and three-to-one for donations from board members. |
| **Revenue type** | Select the revenue type for the matching gift condition. Only revenue of this type is eligible to qualify for a matching gift. |
| **Matching factor** | Enter the ratio by which the organization matches donations. For example, with a factor or 0.5, the organization donates $50 for each $100 the matched relationship donates. If the organization matches gifts evenly, enter 1. |
| **Matching amount** | Select whether the organization matches the total amount of the gift or only the tax-deductible portion, or receipt amount. |
| **Min match per gift** | Enter the minimum amount of gift the organization matches. For example, the organization may match only donations of $25 or higher.<br>If the organization does not require a minimum gift amount, leave this field blank. |
| **Max match per gift** | Enter the maximum amount of gift the organization matches. For example, the organization may match only donations of $1,000 or lower.<br>If the organization does not have a maximum gift amount, leave this field blank. |
| **Max match per year** | Enter the maximum amount of constituent annual giving the organization matches. For example, the organization may match no more than $10,000 of an employee's annual donations.<br>If the organization does not have a maximum gift amount, leave this field blank. |

| Screen Item | Description |
|---|---|
| **Max match total** | Enter the maximum amount of constituent lifetime giving the organization matches. For example, the organization may match no more than $100,000 of an employee's lifetime donations.<br><br>If the organization does not have a maximum gift amount, leave this field blank. |
| **Apply to** | To automatically create matching gifts when you receive revenue from the organization's relationships, select the types of relationships for which the matching gift condition applies. For each relationship type, select whether the condition applies to a specific job schedule, such as Full time or Part time, or career level, such as Executive.<br><br>You can use relationship type, job schedule, and career level together to make conditions as specific as you want them to be. If you use only relationship types, your condition is broadest. For example, if you select Employee as the relationship type, gifts from all employees at the organization are eligible, based on the other conditions. If you select a relationship type of Employee and a job schedule of Full time, then gifts from part time or temporary employees are not eligible.<br><br>If you do not select any relationships, you cannot automatically create matching gifts based on the condition. For information about how to select whether to automatically create matching gifts, see the *Revenue Guide*. |
| **Notes** | Enter any additional information about the organization's matching gift program, such as that it matches an employee's donations only after the employee has been with the organization five years. |

# Edit a Matching Gift Condition for an Organization

After you add a matching gift condition for an organization constituent, you can edit it as necessary.

## Edit a matching gift condition

1. Open the record of the organization constituent with the matching gift condition to edit. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Organization tab.
3. Under **Matching gift conditions**, select the matching gift condition to edit.
4. On the action bar, click **Edit**. The Edit matching gift condition screen appears. The items on this screen are the same as the Add matching gift condition screen. For information about the items on this screen, see Add Matching Gift Condition Screen on page 125.
5. Edit the information as necessary.
6. Click **Save**. You return to the Organization tab.

# Re-order Matching Gift Conditions for a Constituent

If you have multiple matching gift conditions for an organization, you can arrange them in the order the program should check to determine which condition applies to a constituent. For example, if you have a matching gift condition type of Employee and one of Employee Manager, you may want to have Employee Manager first, particularly if the matching factor or match maximums are different. If a constituent is both an employee and a manager at an organization, the Employee Manager condition would need to be listed first on the organization’s matching gift conditions for the Employee Manger condition to apply instead of the Employee condition.

### Re-order matching gift conditions

1. Open the record of the organization constituent with the matching gift condition to delete. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Organization tab.
3. Under **Matching gift conditions**, click **Re-order conditions**. The Re-order matching gift conditions screen appears.
4. Use the arrows to arrange the order of the matching gift condition types as necessary.
5. Click **Save**. You return to the Organization tab with the matching gift conditions displayed in the order you specified.

# Delete a Matching Gift Condition for a Constituent

After you add a matching gift condition for an organization, you can delete it as necessary.

### Delete a matching gift condition

1. Open the record of the organization constituent with the matching gift condition to delete. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Organization tab.
3. Under **Matching gift conditions**, select the matching gift condition to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the matching gift condition.
5. Click **Save**. You return to the Organization tab.

# Group or Household Details

To view and manage information about a constituent group or household, select the Details tab.


Under **Demographics**, information about the group or household's target giving level and income appear. From this frame, you can edit the information entered about a constituent. For information about how to edit demographic information, see Edit Demographic Information for a Constituent on page 105.

Under **Alternate lookup IDs**, additional lookup IDs assigned the group or household appear. Alternate lookup IDs are categorized by type, so a constituent may have multiple alternate lookup IDs. However, a constituent can have only one alternate lookup ID per type. From this frame, you can manage alternate lookup IDs for the group or household.

Under **Interests**, the interests of the group or household appear. For example, a group may have an interest in women's issues. You can add this interest to the record to remind you to include the group when you send invitations to events around women's issues. From this frame, you can manage the interests entered for the group or household.

For constituents marked as inactive, the **Inactive details** frame appears. Under **Inactive details**, information about why the constituent was marked inactive appears. You can edit this information as necessary. For information about how to edit information about the inactive status, see Edit Status Details for an Inactive Constituent on page 99.

# Relationships

Relationships are familial, social, or professional associations with the constituent. Successful fundraising revolves around the ability to cultivate and manage all types of relationships. When you add a relationship for a constituent, the relationship appears on both constituents' Relationships tabs. To view and manage the relationships for a constituent, select the Relationships tab.

You can also view an employment history of an individual or organization constituent. For more information, see Employment History on page 220.

> ***Note:*** To view a hierarchal view of the relationships entered on the Relationships tab, click **Extended Network** under **More information**. The Extended Network page appears. For information about the items on this page, see Extended Network on page 152.

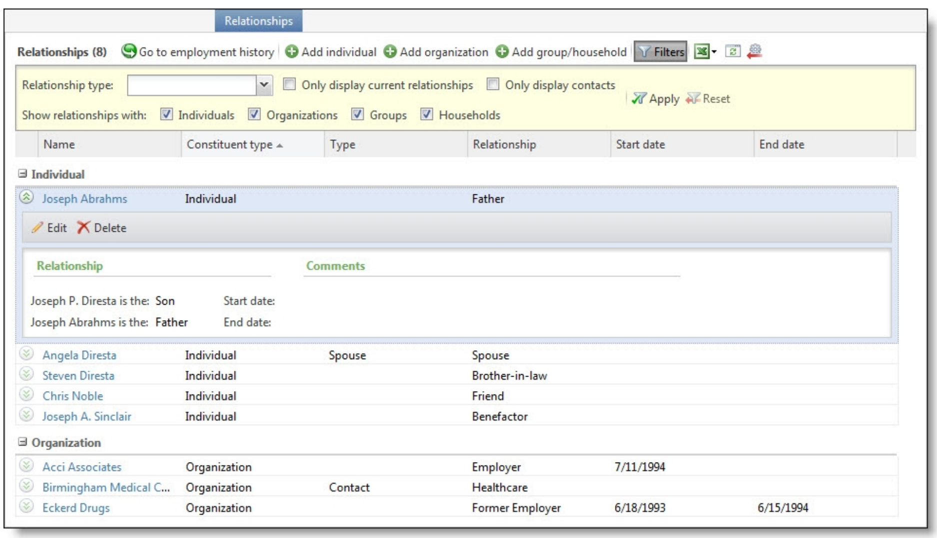
Under **Relationships**, the individual, organization, group, household relationships, and employment history of the constituent appear.

Under **Group member**, if the constituent is a member of a group or household, you can view information about the membership. You can also view information about previous memberships.

# Relationships

From the constituent record, you can view a constituent's familial, social, or professional associations. From the Relationships tab, click **Relationships**. The individual, organization, group, household relationships, and employment history of the constituent appear.

- Individual relationships are the people with whom the constituent is associated, such as a spouse, friend, family member, or business associate.
- Organization relationships are the businesses, churches, agencies, and other organizations that have an association with the constituent. For example, a constituent can be a member of cultural organization, an employee of an business, or a board member of a nonprofit organization.
- Household relationships show the association between constituent households and the constituents included in the households. A household can have multiple constituents as members, but a constituent can be a member of only one household.
- Group relationships show the association between constituents and the constituent groups to which they belong. Group relationships include families made up of multiple households, giving circles, and family foundations.
- Employment history allows you to track the employment history for constituents which includes job title, job category, and career level information. For organization constituents, you can view all employees, past and present. For individual constituents, you can view a work history. You can use the employment history information as an added dimension in cultivation and solicitation. For example, you might hold a special networking event for individuals with jobs in similar categories.




When you add relationships to constituents, you specify the reciprocal relationship. If you add a relationship type of “Father” to a constituent, the reciprocal relationship might be “Son” or “Daughter.” The most common relationship pairs become the default reciprocal relationships. If your organization has more father/daughter pairs than father/son pairs, the default reciprocal relationship when you add a relationship type of “Father” will be “Daughter.” However, you can still select “Son” or any other value for the reciprocal relationship.

For each relationship in the grid, you can view the name and type of the related constituent, the relationship type, the start and end dates of the relationship. To help find a specific relationship, you can filter the relationships that appear. On the action bar, click **Filter**, select the criteria of the relationship to view, and click **Apply**. You can select to view only current or contact relationships and those of a specific relationship type.

You can also limit the relationships that appear in the grid to individuals, organizations, groups, households, or any combination of these relationship categories.

To view additional detail information about a relationship, select the item in the grid and click **Show Details** on the action bar. The **Details** window appears and displays additional information, based on relationship type. For example, for individual relationships, you can view whether the relation is the spouse of or shares a household with the constituent. For organization relationships, you can view whether the constituent is a contact for the organization, the position the constituent holds with the organization, whether the organization is the primary business for the constituent, and whether the organization matches the constituent's gifts.

***Note:*** From an organization constituent record, you can also write a letter to the contact of the organization. Under **Relationships**, select the individual to receive the letter and click **Write a letter** on the action bar. For information about how to write a letter, see Write a Letter to a Constituent on page 68.

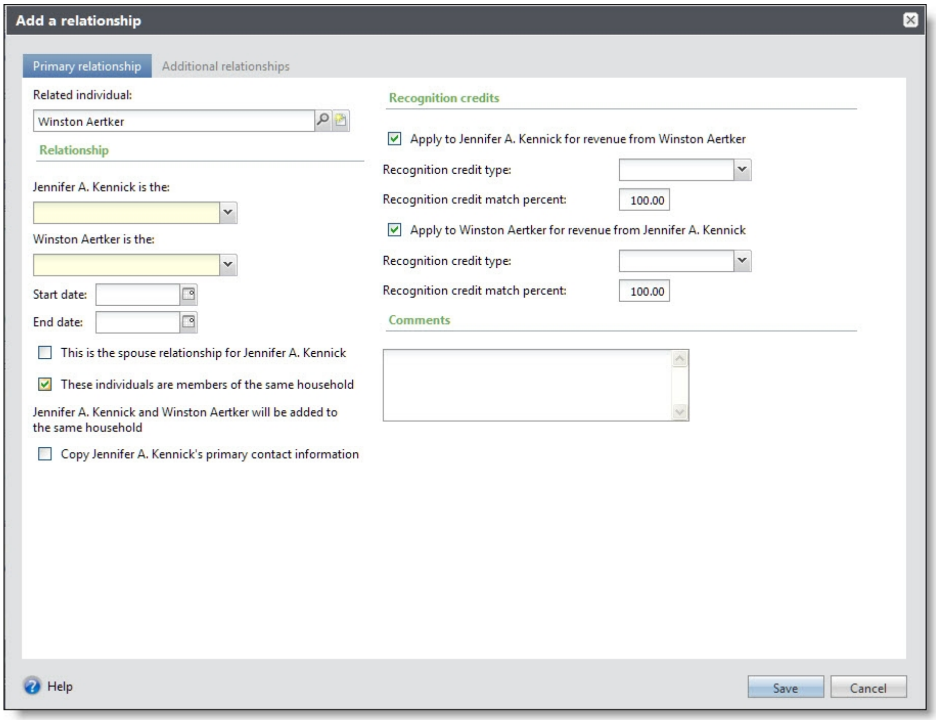
From the grid, you can also manage the relationships of the constituent.

# Add Individual Relationships for an Individual Constituent

From the Relationships tab of an individual constituent record, you can add individual relationships for the constituent. When you add an individual relationship for a constituent, the relationship appears on the Relationship tabs of both the constituent and the related individual.

### Add an individual relationship for an individual constituent

1. Open the record of the individual constituent with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click **Add individual**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Individual Relationship for an Individual Constituent) on page 132.




4. In the **Related individual** field, search for the individual to add as a relationship. If the individual is not already a constituent in the database, you can add the individual from the search screen.

***Note:*** If you know the individual is not already a constituent,click **Add**in the **Related individual** field.

5. Under **Relationship**, select the association the constituent and the related individual have with each other, the start and end dates of the relationship, and whether the relation is the spouse of the constituent or shares a household with the constituent.

***Note:*** When you select a relationship, your organization's common reciprocal relationships appear at the top of the list. For example, if you select that the constituent is the Father, the related individual displays Son and Daughter first, since they are the most common reciprocal relationships for Father. However, you can select another relationship type if necessary.

If you select **This is the spouse relationship for [Constituent]** or **These individuals are members of the same household** and neither the constituent nor the related individual are members of a household, the **Copy [Individual's] primary contact information** checkbox appears. Select whether to copy the constituent's contact information to the record of the related individual.

6. Under **Recognition credits**, select whether to apply recognition credit to the constituent for revenue from the related individual or to the related individual for revenue from the constituent.

   If you select **Apply to [Individual] for revenue from [Related individual]** or **Apply to [Related individual] for revenue from [Individual]**, select the type and percentage of recognition credit to apply.

7. Under **Comments**, enter any additional information about the relationship.

8. If the constituent is in a household and the relationship you add is a member of the household, select the Additional relationships tab to specify the relationships between the new household member and the existing members.
9. Click **Save**. You return to the Relationships tab.

# Add a Relationship Screen (Individual Relationship for an Individual Constituent)

| Screen Item | Description |
|---|---|
| **Related individual** | Search for the individual to add as a relationship. If the individual is not already a constituent in the database, click **Add** on the Individual Search screen.<br>If you know the individual is not already a constituent, you can click **Add** on the Add a relationship screen instead of first going to the search screen. |
| **[Constituent] is the** | Select the constituent's affiliation to the related individual, such as Father or Client. |
| **[Individual] is the** | Select the related individual's affiliation to the constituent, such as Daughter or Attorney.<br>Your organization's common reciprocal relationships for a selected relationship type appear at the top of the list. For example, if you select that the constituent is the Father, therelated individual displays Son and Daughter first, since they are the most common reciprocals for Father. However, you can select another relationship type if necessary. |
| **Start date** and **End date** | Select the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **This is the spouse relationship for [Constituent]** | If the related individual is the spouse or domestic partner of the constituent, select this checkbox.<br>When you select this checkbox, the program automatically selects **These individuals are members of the same household**. |
| **These individuals are members of the same household** | If the related individual is in the same household as the constituent, select this checkbox. If you select **This is the spouse relationship for [Constituent]**, the program automatically selects this checkbox. If both the constituent and related individual are already members of households, this checkbox is disabled.<br>If neither the constituent nor the related individual are members of households, the program automatically creates a record of the new constituent household when you save the relationship. If only one of the two constituents is a member of a household, the program adds the other constituent as a member of the household. |
| **Copy [Constituent's] primary contact information** | If you select **This is the spouse relationship for [Constituent]** or **These individuals are members of the same household** and neither the constituent nor the related individual are members of households, this checkbox appears. To copy the primary contact information from the constituent to the record of the related individual, select this checkbox. |

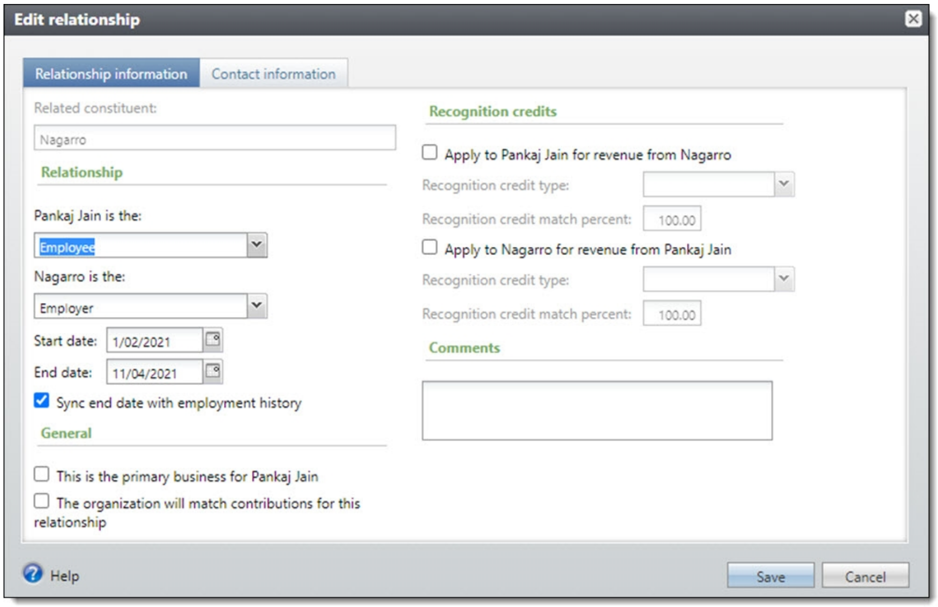
| Screen Item | Description |
|---|---|
| **Apply to [Constituent] for revenue from [Individual]** | To credit the constituent for revenue received from the related individual, select this checkbox. Recognition credits allow multiple constituents to share credit for a single revenue transaction without the creation of duplicate constituents in the database.<br>If you select this checkbox, select the type and percentage of recognition credit to apply to the constituent. |
| **Apply to [Individual] for revenue from [Constituent]** | To credit the related individual for revenue received from the constituent, select this checkbox.<br>If you select this checkbox, select the type and percentage of recognition credit to apply to the related individual. |
| **Comments** | Enter any additional information to record about the relationship.<br>If the constituent is in a household and the relationship you add is a member of the household, you can click on the Additional relationships tab to specify the relationships between the new household member and the existing members |
| **Additional relationships** | If the constituent is in a household and the related individual is a member of the household, select this tab to specify the relationships between the related individual and the existing household members. |

# Add Individual Relationships for an Organization Constituent

From the Relationships tab of an organization constituent record, you can add individual relationships for the organization. When you add an individual relationship for an organization constituent, the relationship appears on the Relationship tabs of both the organization constituent and the related individual.

### Add an individual relationship for an organization constituent

1. Open the record of the organization constituent with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click **Add individual**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Individual Relationship for an Organization Constituent) on page 136.




4. In the **Related individual** field, search for the individual to add as a relationship. If the individual is not already a constituent in the database, you can add the constituent from the search screen.

***Note:*** If you know the individual is not already a constituent, click **Add** in the **Related individual** field.

5. Under **Relationship**, select the association each constituent has with the other and the start and end dates of the relationship.

***Note:*** When you select a relationship, your organization's common reciprocal relationships appear at the top of the list. For example, if you select that the organization is the Employer, the related individual displays Employee first, since it is the most common reciprocal relationship for Employer. However, you can select another relationship type if necessary.

6. Select **Sync end date with employment history** to automatically synchronize end dates when you add or edit an end date on a relationship or employment history for the constituent.

***Note:*** The dates only synchronize with the latest employment information. Historical employment information is not synchronized.

7. Under **General**, select whether the organization is the primary business for the related individual.

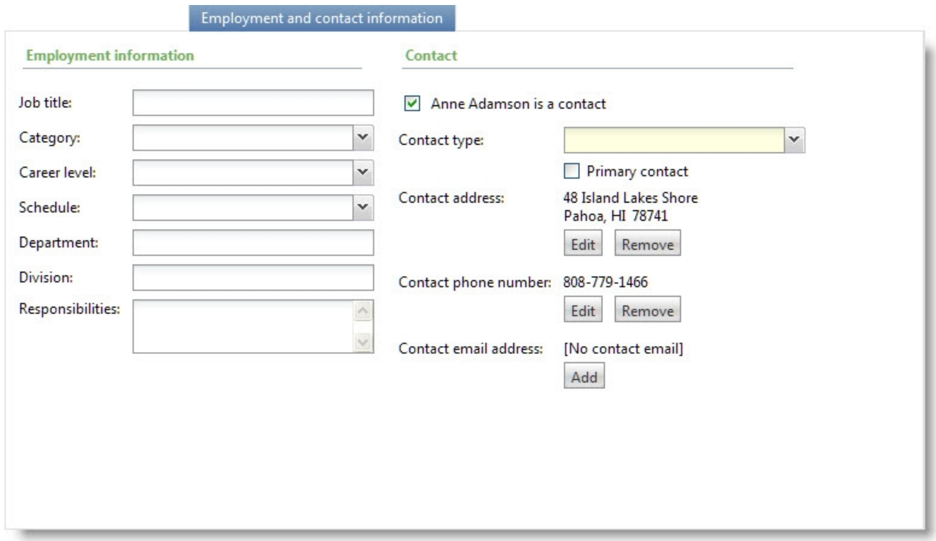
   If the organization is a matching gift company and has matching options set up on the Organization tab of its constituent record to match gifts for the related individual, select **This organization will match contributions for this relationship**.

   If the individual replaces a previous relationship, select **This replaces the relationship with** and select the former organization relationship to replace. After you save, an end date is automatically added to the relationship you replaced.

8. Under **Recognition credits**, select whether to apply recognition credit to the organization for revenue from the individual, or to apply recognition credit to the individual from the

organization. If you select to apply recognition credit to either constituent, select the type and percentage of recognition credit the constituent receives.

9. Under **Comments**, enter any additional information about the relationship.
10. Select the Employment and contact information tab.




11. If the individual is an employee of the organization, under **Employment information**, enter details about the employement, such as job title, career level, schedule, department, and responsibilities.

***Note:*** All individual relationships with employment information appear on the Employment history page, accessed from the Relationships tab of the organization. For information, see Employment History on page 220.

12. Under **Contact**, select whether the individual is a contact for the organization. If you select **Individual is a contact**, select the contact type and whether the related individual is the primary contact for the organization.
13. By default, the **Contact address**, **Contact phone**, and **Contact email address** fields display the primary information of the organization. To use a different contact information for the individual as an organization contact, click **Edit** and enter the contact information. To remove contact information, click **Remove**. If no contact information is specified or you remove existing information, click **Add**to add an address, phone number, or email address for the contact relationship.

    The contact information entered here appears on the Contact tab of the individual's constituent record. If you delete the individual's constituent record, the contact information remains on the relationship.
14. Click **Save**. You return to the Relationships tab.

# Add a Relationship Screen (Individual Relationship for an Organization Constituent)

| Screen Item | Description |
|---|---|
| **Related individual** | Search for the individual to add as a relationship. If the individual is not already a constituent in the database, click **Add** on the Constituent Search screen.<br><br>If you know the individual is not already a constituent, click **Add** on this field to add the constituent. |
| **[Organization] is the** | Select the organization's affiliation to the individual, such as Employer. |
| **[Individua]l is the** | Select the individual's affiliation to the constituent, such as Employee.<br><br>Your organization's common reciprocal relationships for a selected relationship type appear at the top of the list. For example, if you select that the organization is the Employer, the related individual displays Employee first, since it is the most common reciprocal for Employer. However, you can select another relationship type if necessary. |
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **Sync end date with employment history** | Select this option to automatically synchronize end dates when you add or edit an end date on a relationship or employment history for the constituent. The dates only synchronize with the latest employment information. Historical employment information is not synchronized. |
| **This is the primary business for [Individual]** | If the organization is the primary business, such as the employer, for the individual, select this checkbox. |
| **The organization will match contributions for this relationship** | If the organization is a matching gift company and has matching options set up on its constituent record to match gifts for the individual, select this checkbox. |
| **This replaces the relationship with** | If the individual replaces a previous relationship, select this checkbox and select the previous individual relationship. After you save, an end date is automatically added to the relationship you replaced. |
| **Recognition credits** | Select whether to apply recognition credit to the organization for revenue from the individual, or to the individual for revenue from the organization. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives. |

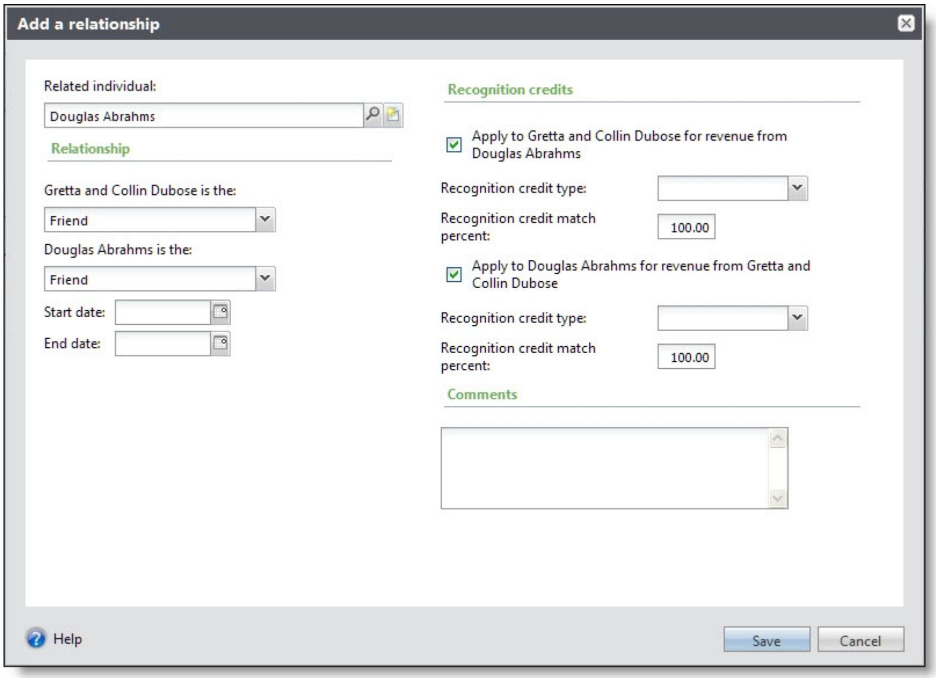
| Screen Item | Description |
|---|---|
| **Comments** | Enter any additional information to record about the relationship. |
| **Employment information** | If the individual is an employee at the organization, enter details about the employment, such as the job title, job category, and career level to use in analysis for future cultivation. You can also enter the employee schedule, department, division, and responsibilities if applicable.<br><br>Constituents may have multiple current jobs, but only with different organizations. All individual relationships with employment information appear on the Employment history page, accessed from the Relationships tab of the organization |
| **Contact** | Select whether the individual is a contact for the organization. If you select **[Individual] is a contact**, select whether the individual is the primary contact for the organization. When you run a communications process that includes the organization, the primary contact receives the communication.<br><br>By default, the **Contact address**, **Contact phone**, and **Contact email address** fields display the primary contact information of the organization. To use different contact information for the individual as an organization contact, click **Edit**and enter the contact information. To remove a contact address, phone number, or email address, click **Remove**. If no contact information is specified or you remove existing information, click **Add** to add contact information.<br><br>Thecontact information entered here appears on the Contact tab of the individual's constituent record. If you delete the individual's constituent record, the contact information remains on the relationship. |

# Add Individual Relationships for a Constituent Group or Household

From the Relationships tab of a constituent group or household record, you can add individual relationships. When you add an individual relationship for a group or household, the relationship appears on the Relationship tabs of both the group or household and the related individual.

## Add an individual relationship for a constituent group or household

1. Open the record of the constituent group or household with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click **Add individual**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Individual Relationship for a Constituent Group or Household) on page 138.




4. In the **Related individual** field, search for the individual to add as a relationship. If the individual is not already a constituent in the database, you can click the constituent from the search screen.

***Note:*** If you know the individual is not already a constituent, click **Add** in the **Related individual** field.

5. Under **Relationship**, select the association each constituent has with the other, as well as the start and end dates of the relationship.

***Note:*** When you select a relationship, your organization's common reciprocal relationships appear at the top of the list. For example, if you select that a household is the Friend, the related individual displays Friend first, since it is the most common reciprocal relationship for Friend. However, you can select another relationship type if necessary.

6. Under **Recognition credits**, select whether to apply recognition credit to the constituent for revenue from the individual, or to the individual for revenue from the constituent.

   If you select **Apply to [group or household name] for revenue from [Related individual]** or **Apply to [Related individual] for revenue from [group or household name]**, select the type and percentage of recognition credit to apply.

7. Under **Comments**, enter any additional information about the relationship.
8. Click **Save**. You return to the Relationships tab.

## Add a Relationship Screen (Individual Relationship for a Constituent Group or Household)

The table below explains the items on the Add relationship screen. For information about how to access this screen, see Add Individual Relationships for a Constituent Group or Household on page

137.

| Screen Item | Description |
|---|---|
| **Related constituent** | Search for the individual to add as a relationship. If the individual is not already a constituent in the database,you can add the constituent from the search screen.<br>If you know the individual is not already a constituent, click **Add** in this field to add the constituent. |
| **[Group or household] is the** | Select the constituent's affiliation to the related individual. |
| **[Individual] is the** | Select the individual's affiliation to the constituent group or household.<br>Your organization's common reciprocal relationships for a selected relationship type appear at the top of the list. For example, if you select that a household is a Friend, the related individual displays Friend first, since it is the most common reciprocal for Friend. However, you can select another relationship type if necessary. |
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **Recognition credits** | Select whether to apply recognition credit to the group or household for revenue from the individual, or to the individual for revenue from the group or household. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives. |
| **Comments** | Enter any additional information to record about the relationship. |

# Edit an Individual Relationship for a Constituent

After you add individual relationships for a constituent, you can change the information at any time. When you edit an individual relationship for a constituent, the changes to the relationship appear on the Relationship tabs of both the constituent and the related individual.

### Edit an individual relationship for a constituent

1. Open the record of the constituent with the relationship to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, select the individual relationship to edit.
4. On the action bar, click **Edit**. The Edit relationship screen appears. The items on this screen are the same as the Add a relationship screen. For information about the items on this screen, see Add a Relationship Screen (Individual Relationship for an Individual Constituent) on page 132, Add a Relationship Screen (Individual Relationship for an Organization Constituent) on page 136, or Add a Relationship Screen (Individual Relationship for a Constituent Group or Household) on page 138.

5. Edit the information as necessary.
6. Click **Save**. You return to the Relationships tab.

# Delete an Individual Relationship for a Constituent

From the Relationships tab of a constituent record, you can delete individual relationships as necessary. When you delete an individual relationship from a constituent, the program removes the relationship from the Relationship tabs of both the constituent and the related individual.

***Tip:*** To retain a historical record of the relationship, edit its end date to indicate the relationship is not current rather than delete the relationship. For information about how to edit a relationship, see Edit an Individual Relationship for a Constituent on page 139.

To delete an individual relationship from a constituent, from the Relationships tab, click **Relationships**. Then select the relationship from the constituent's record and click **Delete**. When a message appears to ask whether to delete the relationship, click **Yes**.

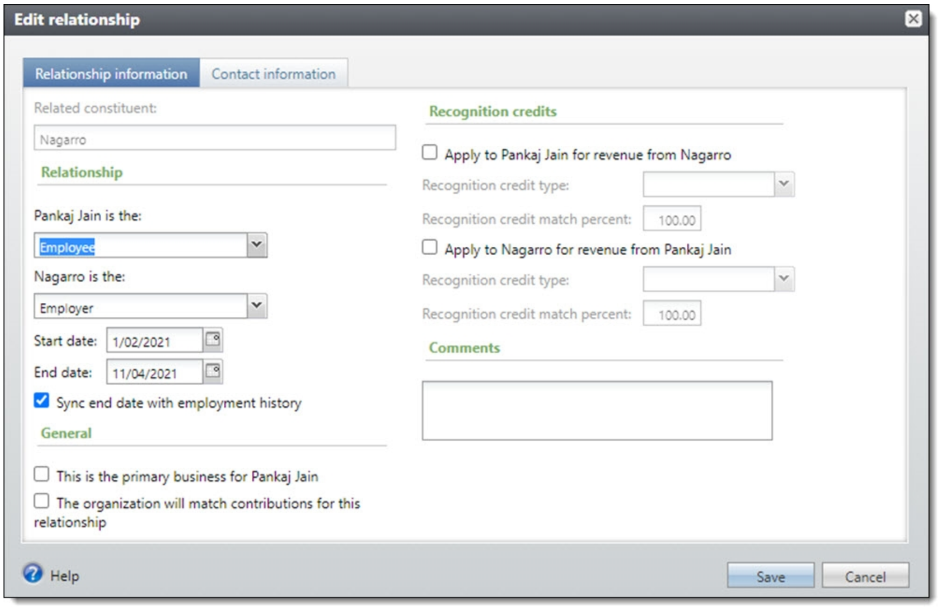
***Note:*** When you delete an individual relationship with a household member from an individual constituent, you delete only the relationship defined for the household member. The household member continues to appear under **Relationships**, but no relationship type appears in the **Relationship** column. To completely remove the related individual from the constituent, remove the related individual from the shared household.

# Add Organization Relationships for an Individual Constituent

From the Relationships tab of an individual constituent record, you can add organization relationships for the constituent. When you add an organization relationship for an individual constituent, the relationship appears on the Relationship tabs of both the individual constituent and the related organization.

### Add an organization relationship for an individual constituent

1. Open the record of the individual constituent with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click **Add organization**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Organization Relationship for an Individual Constituent) on page 143.



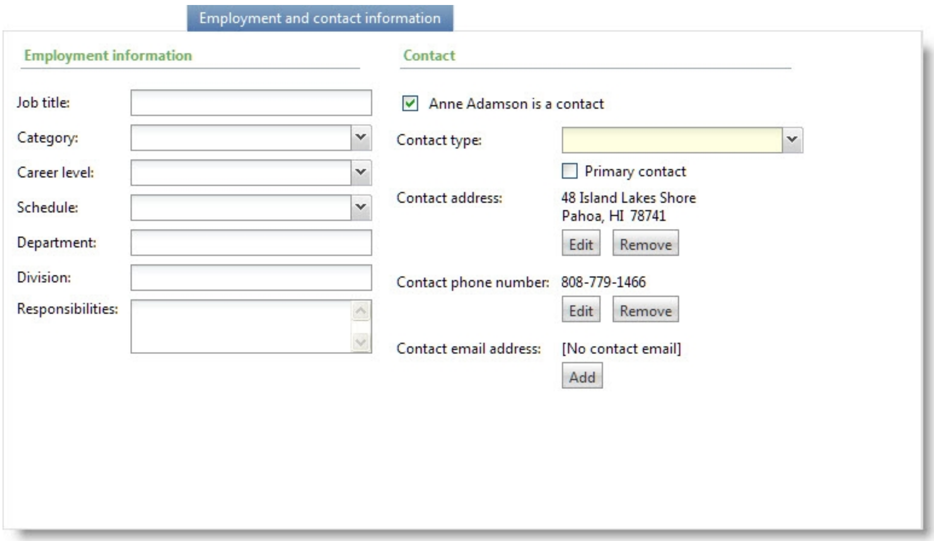

4. In the **Related organization** field, search for and select the organization to add as a relationship.
5. Under **Relationship**, select the association each constituent has with the other and the start and end dates of the relationship.
6. Select S**ync end date with employment history** to automatically synchronize end dates when you add or edit an end date on a relationship or employment history for the constituent.

***Note:*** The dates only synchronize with the latest employment information. Historical employment information is not synchronized.

7. Under **General**, select whether the organization is the primary business for the related individual.

   If the organization is a matching gift company and has matching options set up on the Organization tab of its constituent record to match gifts for the related individual, select whether the organization matches gifts received from the individual.

   If the individual replaces a previous relationship, select **This replaces the relationship with** and select the former organization relationship. After you save, an end date is automatically added to the relationship you replaced.
8. Under **Recognition credits**, select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit to apply.
9. Under **Comments**, enter any additional information about the relationship.
10. Select the Employment and contact information tab.




11. If the individual is an employee of the organization, under **Employment information**, enter details about the employment, such as job title, career level, schedule, department, and responsibilities.
12. To hide the employment relationship on your Blackbaud Internet Solutions website, select **Is private**.

***Note:*** All organization relationships with employment information appear on the Employment history page, accessed from the Relationships tab of the individual. For more information, see Employment History on page 220.

13. Under **Contact**, select whether the individual is a contact for the organization. If you select **Individual is a contact**, select the contact type and whether the related individual is the primary contact for the organization.
14. By default, the **Contact address**, **Contact phone**, and **Contact email address** fields display the primary information of the organization. To use a different contact information for the individual as an organization contact, click **Edit** and enter the contact information. To remove contact information, click **Remove**. If no contact information is specified or you remove existing information, click **Add**to add an address, phone number, or email address for the contact relationship.

    The contact information entered here appears on the Contact tab of the individual's constituent record. If you delete the individual's constituent record, the contact information remains on the relationship.
15. Click **Save**. You return to the Relationships tab.

# Add a Relationship Screen (Organization Relationship for an Individual Constituent)

| Screen Item | Description |
|---|---|
| **Related organization** | Search for the organization to add as a relationship.<br>If the organization is not already a constituent, you can add the organization constituent from the search screen. |
| **[Related individual] is the** | Select the constituent's affiliation to the organization, such as Employee. |
| **[Organization] is the** | Select the organization's affiliation to the constituent, such as Employer. |
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **Sync end date with employment history** | Select this option to automatically synchronize end dates when you add or edit an end date on a relationship or employment history for the constituent. The dates only synchronize with the latest employment information. Historical employment information is not synchronized. |
| **This is the primary business for [Related individual]** | If the related organization is the primary business, such as the employer, for the individual, select this checkbox. |
| **The organization will match contributions for this relationship** | If the organization is a matching gift company and has matching gift conditions set up on the Organization tab of its constituent record to match gifts for the individual, select this checkbox. |
| **This replaces the relationship with** | If the organization replaces a previous relationship, select this checkbox and select the previous organization relationship. After you save, an end date is automatically added to the relationship you replaced. |
| **Recognition credits** | Select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit, specify the type and percentage of recognition credit to apply. |

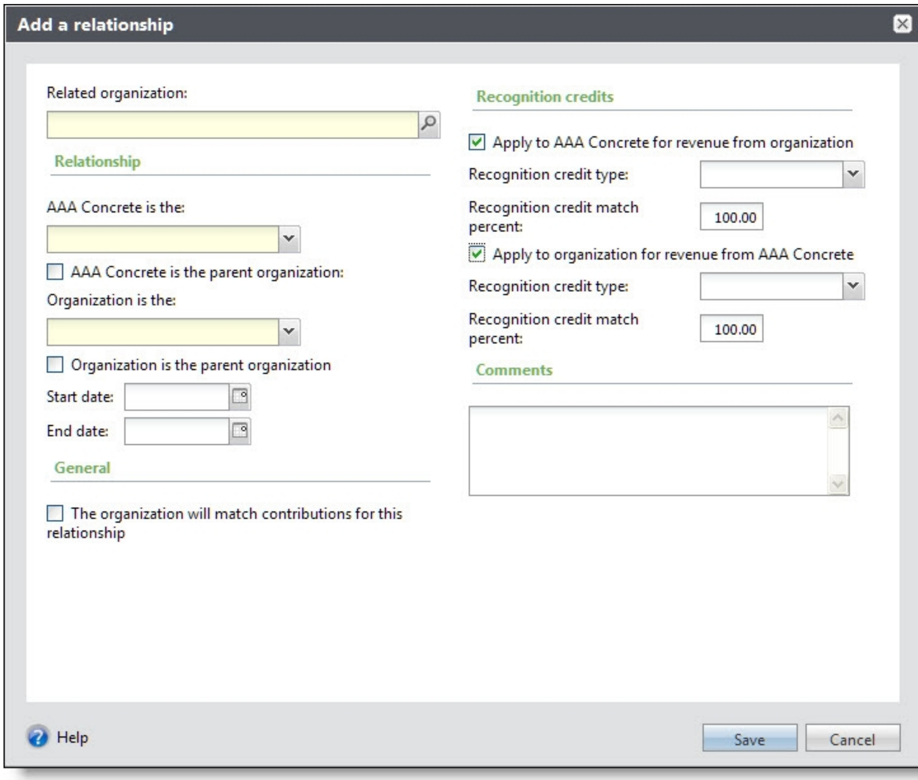
| Screen Item | Description |
| --- | --- |
| **Comments** | Enter any additional information to record about the relationship. |
| **Employment information** | If the individual is an employee at the organization, enter details about the employment, such as the job title, job category, and career level to use in analysis for future cultivation. You can also enter the employee schedule, department, division, and responsibilities if applicable.<br><br>To hide the employment relationship on your Blackbaud Internet Solutions website, select **Is private**.<br><br>Constituents may have multiple current jobs, but only with different organizations. All individual relationships with employment information appear on the Employment history page, accessed from the Relationships tab of the organization. |
| **Contact** | Select whether the individual is a contact for the organization. If you select **[Individual] is a contact**, select whether the individual is the primary contact for the organization. When you run a communications process that includes the organization, the primary contact receives the communication.<br><br>By default, the **Contact address**, **Contact phone**, and **Contact email address** fields display the primary contact information of the organization. To use different contact information for the individual as an organization contact, click **Edit**and enter the contact information. To remove a contact address, phone number, or email address, click **Remove**. If no contact information is specified or you remove existing information, click **Add** to add contact information.<br><br>Thecontact information entered here appears on the Contact tab of the individual's constituent record. If you delete the individual's constituent record, the contact information remains on the relationship. |

# Add Organization Relationships for an Organization Constituent

From the Relationships tab of an organization constituent record, you can add organization relationships for the constituent. When you add an organization relationship for an organization constituent, the relationship appears on the Relationship tabs of both organizations.

## Add an organization relationship for an organization constituent

1. Open the record of the organization constituent with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click  **Add organization**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Organization Relationship for an Organization Constituent) on page 145.




4. In the **Related organization** field, search for and select the organization to add as a relationship.
5. Under **Relationship**, select the association each constituent has with the other, specify the parent organization, and select the start and end dates of the relationship.
6. Under **General**, select whether the related organization matches revenue from the organization constituent.
7. Under **Recognition credits**, select whether to apply recognition credit to either organization for revenue from the other. If you select to apply recognition credit to a constituent, select the type and percentage of recognition credit the constituent receives.
8. Under **Comments**, enter any additional information about the relationship.
9. Click **Save**. You return to the Relationships tab.

## Add a Relationship Screen (Organization Relationship for an Organization Constituent)

The table below explains the items on the Add relationship screen. For information about how to access this screen, see Add Organization Relationships for an Organization Constituent on page 144.

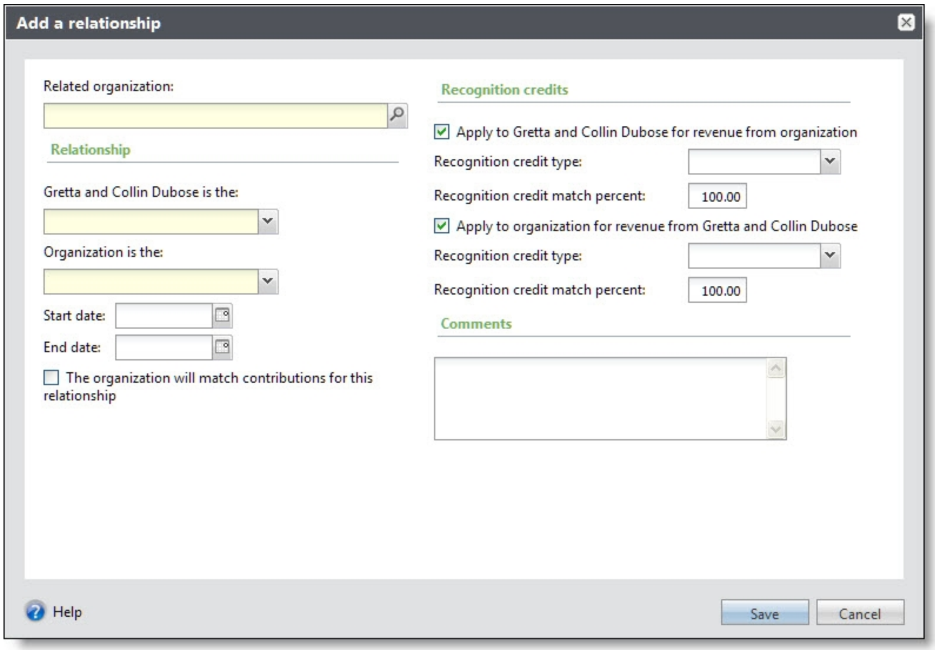
| Screen Item | Description |
|---|---|
| **Related organization** | Search for and select the organization to add as a relationship. For information about the items on the Organization Search screen, see Constituent Search Screen on page 63.<br><br>If the related organization is not already a constituent, you can add theconstituent from the search screen. |
| **[Organization] is the** | Select the constituent's affiliation to the organization such as Business Partner. |
| **Constituent is the parent organization** | Select whether the constituent is the parent organization. |
| **Organization is the** | Select the related organization's affiliation to the constituent such as Business Partner. |
| **Organization is the parent organization** | Select whether the related organization is the parent organization. |
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **This organization will match contributions for this relationship** | Select whether the related organization nmatches contributions for revenue from the organization constituent. |
| **Recognition credits** | Select whether to apply recognition credit to either organization for revenue from the other. If you select to apply recognition credit to a constituent, specify the type and percentage of recognition credit the constituent receives. |
| **Comment** | Enter any additional information to record about the relationship. |

# Add Organization Relationships for a Constituent Group or Household

From the Relationships tab of a constituent group or household record, you can add organization relationships. When you add an organization relationship for a constituent group or household, the relationship appears on the Relationship tabs of both the constituent group or household and the related organization.

### Add an organization relationship for a constituent group or household

1. Open the record of the constituent group or household with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under Relationships, click **Add organization**. The Add a relationship screen appears. For information about the items on this screen, see Add Relationship Screen (Organization Relationship for a Constituent Group or Household) on page 147




4. In the **Related organization** field, search for and select the organization to add as a relationship.
5. Under **Relationship**, select the association the group or household and the organization have with each other and the start and end dates of the relationship.
6. Select whether the organization matches charitable giving from the group or household.
7. Under **Recognition credits**, select whether to apply recognition credit to the group or household for revenue from the organization, or to the organization for revenue from the group or household. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives.
8. Under **Comments**, enter any additional information about the relationship.
9. Click **Save**. You return to the Relationships tab.

# Add Relationship Screen (Organization Relationship for a Constituent Group or Household)

The table below explains the items on the Add relationship screen. For information about how to access this screen, see Add Organization Relationships for a Constituent Group or Household on page 146.

| Screen Item | Description |
|---|---|
| **Related organization** | Search for the organization to add as a relationship. For information about the items on the Organization Search screen, see Constituent Search Screen on page 63.<br><br>If the organization is not already a constituent, you can add the constituent from the search screen. |

| Screen Item | Description |
|---|---|
| **[Group/household] is the** | Select the group or household's affiliation to the organization. |
| **[Related organization] is the** | Select the organization's affiliation to the group or household. |
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **This organization will match contributions for this relationship** | Select whether the organization match contributions for revenue from the group or household. |
| **Recognition credits** | Select whether to apply recognition credit to the group or household for revenue from the organization, or to the organization for revenue from the group or household. If you select to apply recognition credit to a constituent, specify the type and percentage of recognition credit the constituent receives. |
| **Comment** | Enter any additional information to record about the relationship. |

# Edit an Organization Relationship for a Constituent

After you add organization relationships for a constituent, you can change the information at any time. When you edit an organization relationship for a constituent, the changes to the relationship appear on the Relationship tabs of both the constituent and the related organization.

## Edit an organization relationship for a constituent

1. Open the record of the constituent with the relationship to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, select the organization relationship to edit.
4. On the action bar, click **Edit**. The Edit relationship screen appears. The items on this screen are the same as the Add a relationship screen. For information about the items on this screen, see Add a Relationship Screen (Organization Relationship for an Individual Constituent) on page 143, Add a Relationship Screen (Organization Relationship for an Organization Constituent) on page 145, or Add Relationship Screen (Organization Relationship for a Constituent Group or Household) on page 147.
5. Edit the information as necessary.
6. Click **Save**. You return to the Relationships tab.

# Delete an Organization Relationship for a Constituent

From the Relationships tab of a constituent record, you can delete organization relationships as necessary. When you delete an organization relationship from a constituent, the program removes the relationship from the Relationship tabs of both the constituent and the related organization.

***Tip:*** To retain a historical record of the relationship, you can edit its end date to indicate the relationship is not current rather than delete the relationship. For information about how to edit a relationship, see Edit an Organization Relationship for a Constituent on page 148.

### Delete an organization relationship for a constituent

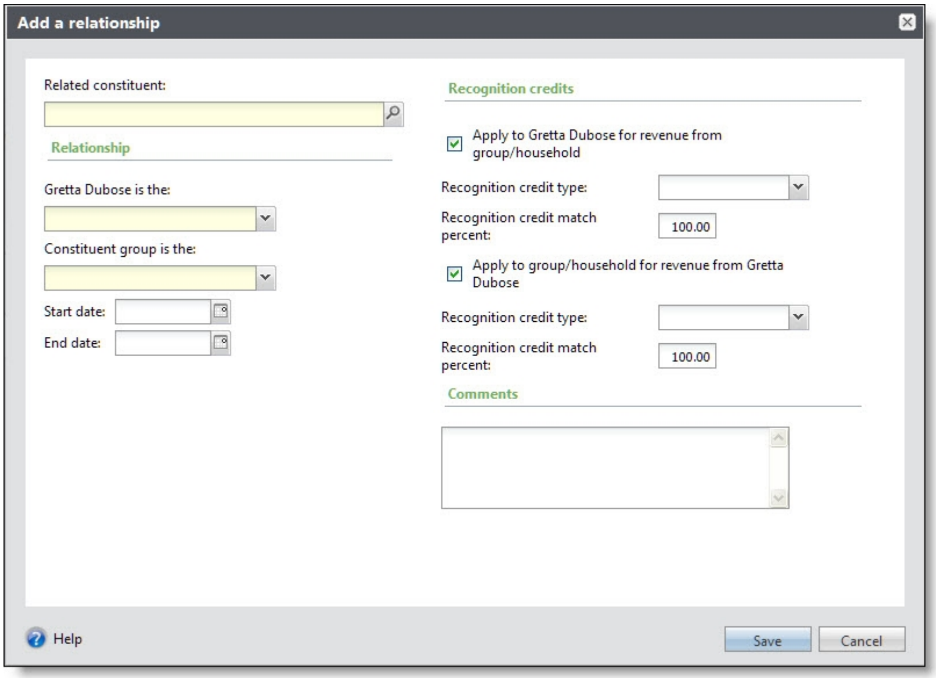
1. Open the record of the constituent with the relationship to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, select the organization relationship to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the relationship.
5. Click **Yes**. You return to the Relationships tab.

# Add Group or Household Relationships for a Constituent

From the Relationships tab of a constituent record, you can add constituent group or household relationships for the constituent. When you add a constituent group or household relationship for a constituent, the relationship appears on the Relationship tabs of both the constituent and the related group or household.

### Add a constituent group or household relationship for a constituent

1. Open the record of the constituent with the relationship to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, click **Add group/household**. The Add a relationship screen appears. For information about the items on this screen, see Add a Relationship Screen (Constituent Group or Household Relationship for a Constituent or a Constituent Household) on page 150.




4. In the **Related constituent** field, search for and select the group or household to add as a relationship.
5. Under **Relationship**, select the association the constituent and the group or household have with each other and the start and end dates of the relationship.
6. Under **Comments**, enter any additional information about the relationship.
7. Under **Recognition credits**, select whether to apply recognition credit to the constituent for revenue from the group or household, or to the group or household for revenue from the constituent. If you select to apply recognition credit to a constituent, specify the type and percentage of recognition credit the constituent receives.
8. Click **Save**. You return to the Relationships tab.

# Add a Relationship Screen (Constituent Group or Household Relationship for a Constituent or a Constituent Household)

| Screen Item | Description |
|---|---|
| **Related constituent** | Search for the group or household to add as a relationship. |
| **[Constituent] is the** | Select the constituent's affiliation to the related group or household. |
| **[Constituent group] is the** | Select the related group or household’s affiliation to the constituent. |

| Screen Item | Description |
|---|---|
| **Start date** and **End date** | Enter the dates the relationship begins and ends. If the relationship is for an undetermined length of time, leave the **End date** field blank. |
| **Recognition credits** | Select whether to apply recognition credit to the constituent for revenue from the group or household, or to the group or household for revenue from the constituent. If you select to apply recognition credit to a constituent, specify the type and percentage of recognition credit the constituent receives. |
| **Comments** | Enter any additional information to record about the relationship. |

# Edit a Group or Household Relationship for a Constituent

After you add group or household relationships for a constituent, you can change the information at any time. When you edit a group or household relationship for a constituent, the changes to the relationship appear on the Relationship tabs of both the constituent and the related group or household.

### Edit a constituent group or household relationship for a constituent

1. Open the record of the constituent with the relationship to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, select the group or household relationship to edit.
4. On the action bar, click **Edit**. The Edit relationship screen appears. The items on this screen are the same as the Add a relationship screen. For information about the items on this screen, see Add a Relationship Screen (Constituent Group or Household Relationship for a Constituent or a Constituent Household) on page 150.
5. Edit the information as necessary.
6. Click **Save**. You return to the Relationships tab.

# Delete a Group or Household Relationship for a Constituent

From the Relationships tab of a constituent record, you can delete constituent group or household relationships as necessary. When you delete a group or household relationship from a constituent, the program removes the relationship from the Relationship tabs of both the constituent and the related group or household.

***Tip:*** To retain a historical record of the relationship, you can edit its end date to indicate the relationship is not current rather than delete the relationship. For information about how to edit a relationship, see Edit a Group or Household Relationship for a Constituent on page 151.

### Delete a group or household relationship for a constituent

1. Open the record of the constituent with the relationship to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Relationships tab, and then click **Relationships**.
3. Under **Relationships**, select the group or household relationship to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the relationship.
5. Click **Yes**. You return to the Relationships tab.

# Group Member Tab

If a constituent is a member of a group or household, you can view information about the membership on the **Group Member** tab. From the constituent record, under the Relationships tab, click **Group Member**. On the **Group Member** tab, you can view the current and previous group and household memberships of the constituent.

To view the record of a current or previous group, click its name under **Current group memberships** or **Previous group memberships**.

Under **Previous group memberships**, you can manage the constituent's previous memberships with groups or households.

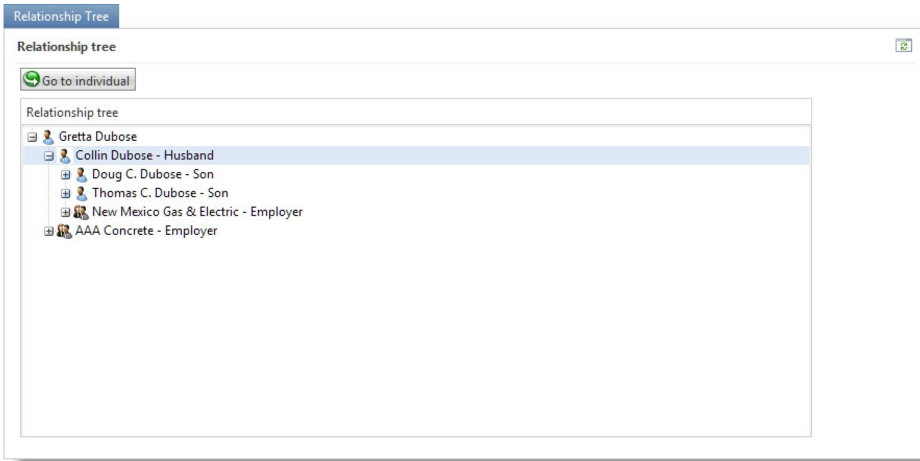
# Extended Network

From the constituent record, to access a tree view of the constituent’s relationships, click **Extended network** under **More information**. The Extended Network page for the constituent appears. The Extended Network page displays detail information from the constituent record, such as contact information, lookup ID, and active constituencies. On the Relationship Tree tab, you can view a hierarchal view of the constituent’s relationships, including the relationships for each entry in the tree view. For information about this tab, see Relationship Tree on page 152.

The Extended Relationships tab allows you to view all relationships identified by ***WealthPoint*** for an individual constituent, constituent group, or households. For information about this tab, see Extended Relationships on page 153.

# Relationship Tree

On the Relationship Tree tab, the **Relationship tree** grid displays a hierarchal view of the constituent’s relationships entered on the Relationships tab.

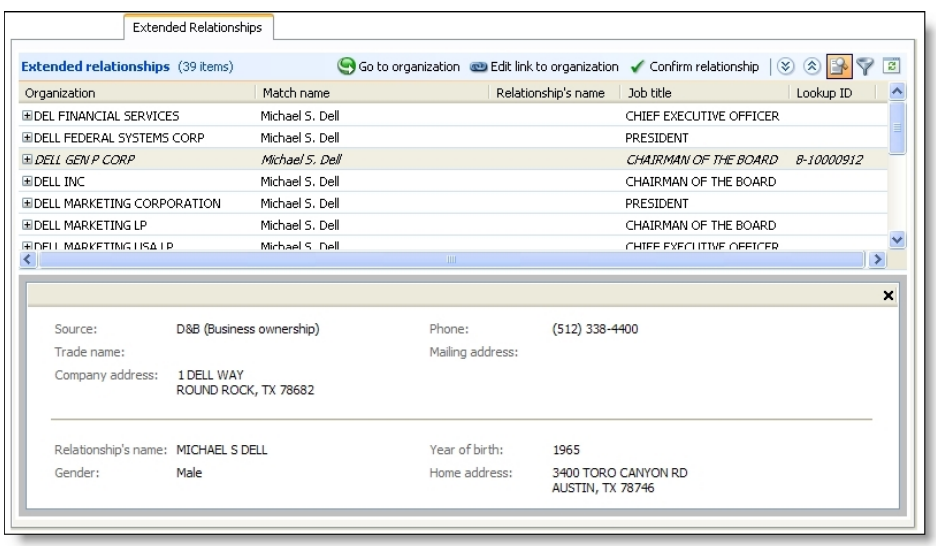



You can also view the relationships of each related constituent in the tree. To view the relationships of a related constituent, click its plus sign. For example, Arthur Blank's wife Wendy appears on the Relationships tab of Arthur's constituent record. Wendy works for Davis & Johnson Pharmaceuticals, and this relationship appears on the Relationships tab of Wendy's constituent record. When you click the plus sign next to Wendy's name, her relationships appear, including Davis & Johnson Pharmaceuticals. To make sure the tree displays the latest information, click **Refresh List**.

To access the constituent record of a related constituent, select it in the tree and click **Go to constituent**.

To view a graphic representation of the constituent's relationships, under **More information**, click **Relationship maps**. For information about relationship maps, see Relationship Maps on page 156.

# Extended Relationships




On the Extended Relationships tab, the **Organization** column displays the names of organizations with a confirmed relationship with the constituent. Click the plus sign next to the organization name to view a list of individuals with ties to the selected organization. If the individual is a constituent in your database, the name is italicized; if the individual is a constituent in your database and has a formal relationship with the selected constituent, the name is bold and italicized.

***Note:*** The **Lookup ID** columns populates only if the relationship record is linked to a constituent in your database.

When you screen a prospect through ***WealthPoint***, the constituent information from your database is matched against businesses and organizations in the ***WealthPoint*** database that they may have an involvement with. After a record is matched, the application determines who else in the ***WealthPoint*** database the associated prospect may have relationships with. The application returns the organizational and individual relationships, which appear on the Extended Relationships tab. These relationships can include people associated with the same nonprofit or foundation as board members, directors, or trustees; or business partners associated as colleagues or co-executives. Because of your relationship with the initial prospect, you may be able to add to your donor pool by reaching out to these extended relationships.

## Add/Link an Extended Relationship individual or organization as a constituent in your database

1. Open the record of the constituent with the extended relationship to add as a constituent or link to a constituent record. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Extended relationships**. The Extended Network page appears.
3. Select the Extended Relationships tab.
4. Under **Extended Relationships** , select the relationship to add as a new constituent or link to a constituent record.
5. On the action bar, click **Edit link**. The Edit link screen appears.
6. To link the relationship to an constituent record, select **[Relationship] is linked to**, and then search for and select the constituent to link to the relationship.

   To add the relationship as a new constituent, select **[Relationship] is linked to** and click **Add new** to add the constituent.

   ***Warning:*** If you add the relationship as an individual constituent, you must enter primary business relationship information about the individual. For information about how to add an individual, see Add an Individual Screen on page 234. For information about how to add an organization, see Add an Organization Screen on page 250.
7. Click **Save**. You return to the Edit link screen.
8. Click **Save**. You return to the Extended Relationships tab. Under **Extended Relationships**, the name of the individual or organization appears in italics.

## Unlink an Extended Relationship individual or organization from a constituent in your database

1. Open the record of the constituent with the extended relationship to unlink from a constituent record. For information about how to open a constituent record, see Constituent Search on page 61.

2. Under **More information**, click **Extended relationships**. The Extended Network page appears.
3. Select the Extended Relationships tab.
4. Under **Extended Relationships** , select the relationship to unlink from a constituent record.
5. On the action bar, click **Edit link**. An Edit link screen appears.
6. Select **[Relationship] is not linked to a constituent**.
7. Click **Save**. The link is removed, and you return to the Extended Relationships tab.

## Add/confirm a linked Extended Relationship individual or organization as a relationship on the constituent record

So prospect researchers have time to thoroughly investigate the giving potential of an extended relationship, the individuals and organizations that appear on the Extended Relationships tab of a constituent's Extended Network page are not formally linked as relationships on the constituent's record. After you determine the giving potential, you can easily promote an individual or organization to the formal position of relationship as necessary.

1. Open the record of the constituent with the extended relationship to add or confirm as a relationship. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Extended relationships**. The Extended Network page appears.
3. Select the Extended Relationships tab.
4. Under **Extended Relationships** , select the relationship to add as a relationship on the constituent’s record.
5. On the action bar, click **Confirm relationship**. The Add relationship screen appears.
6. Under **Relationship**, enter relationship information about the individual or organization.
7. Click **Save**. You return to the Extended Relationships tab. Under **Extended Relationships**, the name of the individual or organization appears in bold and italics.

## Go to a linked constituent’s record

1. Open the record of the constituent with the extended relationship to view as a linked constituent. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Extended relationships**. The Extended Network page appears.
3. Select the Extended Relationships tab.
4. Under **Extended Relationships**, select the linked relationship to view as a constituent.
5. On the action bar, click **Go to constituent**. The selected constituent record appears.
6. To return to the Extended Relationships tab, click **Back**.

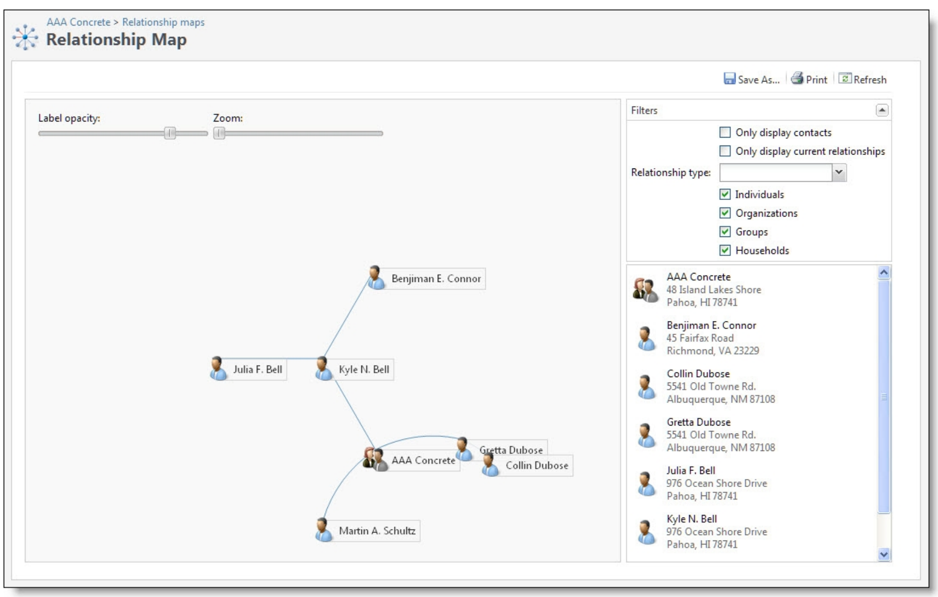
### Export extended relationship information to an outside application

1. Open the record of the constituent with the extended relationship to view as a linked constituent. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Extended relationships**. The Extended Network page appears.
3. Select the Extended Relationships tab.
4. Under **Extended Relationships**, right-click and select **Export grid**. The Save as screen appears.
5. Browse to the location to save the file and enter a name for the file. In the **Save as type** field, you can select only "Comma separated value".
6. Click **Save**. You can open the saved *.csv file format in several applications such as Microsoft *Excel*.

# Relationship Maps

To view a graphic representation of the constituent’s relationships, you can create a relationship map on the constituent's Relationship Map page. To access this page from a constituent's record, click **Relationship maps** under **More information**.

To create a relationship map, click **Add**. An interactive spoke and wheel map appears that connects the constituent to each of related constituent.




To adjust the appearance or scope of the map, use these options.

| Screen Item | Description |
|---|---|
| **Label opacity** | To adjust the darkness of the label text, move the slider to the left or right. |

| Screen Item | Description |
|---|---|
| **Zoom** | To zoom in and out from the map, move the slider to the left or right. |
| **Pin/Unpin** | To pin a constituent, which keeps the label visible regardless of the **Label opacity** setting, hover your cursor over the constituent and click **Pin**. To allow the label display to change based on the **Label opacity**, click **Unpin**. |
| **Expand /Collapse** | To expand the map to include additional relationships, place your cursor over a constituent and click **Expand**. The map now includes that constituent's relations. |
| **Go to constituent** | To open the record of a related constituent, hover your cursor over the constituent and click **Go to constituent**. |
| **Filters** | Select the criteria for relations to include in the map, such as relationship type or constituent type. |
| **Save As** | To save the map for later use, click this button. Saved maps appear on the Relationship Maps page. |
| **Print** | To print the map, click this button. |

## Relationship Maps Properties

When you save a relationship map, a properties screen appears. On this screen, you can enter a name and description for the map and select whether to allow other users to edit it. To add a relationship map, click **Add** on the Relationship Maps page, design the map, and click **Save As**. To edit a user map, select it on the Relationship Maps page and click **Edit properties**.

The table below explains the items on the properties screen.

| Screen Item | Description |
|---|---|
| General tab | Enter a unique name and description for the relationship map. |
| Permissions tab | Select whether other users can edit the relationship map. |

# Revenue Information

To view a snapshot of a constituent's revenue information, from the constituent record, click the Revenue tab. To help you navigate through this information, the Revenue tab contains multiple second-tier tabs.

## Revenue Summary

The Revenue Summary tab displays a cumulative summary of a constituent's revenue. For an individual constituent associated with a household, it displays the total giving balance for the individual (left side of the tab) and for any household to which the constituent belongs (right side of tab). For a constituent household, it displays the total revenue for all household members.

You can filter the information that appears on this tab.

- You can filter the information by criteria such as date and whether to view the information based on calendar year or fiscal year. You can also select a revenue filter to determine the types of revenue transactions and applications to include in amounts.

  The **Sites** filter option allows you to view summary information associated with a specific site. You can also filter by campaigns.

- For individual constituents who are household members, any selections in the filters apply to both the **Individual summary** and **Household summary** grids. The revenue data appears based on the individual and the household. For example, under**Individual summary**, the total of all revenue for the individual appear; under **Household summary**, the total of all revenue for all members of the household appears.

***Note:*** From the **Reporting filters** configuration task in *Revenue*, you can configure revenue filters. For example, you can create one filter to include all types of revenue transactions and applications and another to include only payments toward donations, pledges, and recurring gifts.

| Screen Item | Description |
|---|---|
| **Total revenue** | This field appears for households and individuals who are not household members. This field displays the total amount of all payments received from the constituent and the balance of any existing commitments. For example, the total includes payments toward pledge installments and the pledge balance, minus write-offs. Payments toward recurring gifts are included, but not recurring gifts themselves. The balance of any overdue, unpaid recurring gift installments is included.<br><br>The total includes planned gifts are included if added as revenue; the calculation includes planned gift payments, as well as the balance of the planned gift.<br><br>Other types of revenue considered as commitments, such as event registrations and matching gift claims, work the same way. Payments toward the commitments are included, as well as any remaining balance for the commitments. |
| **Total** | This field appears for individual constituents who are household members. Under **Individual summary**, this field displays the total revenue received from the individual. Under **Household summary**, this field displays the total revenue received from the household to which the individual belongs. |
| **Total revenue by members** | For a constituent household, this field displays the total amount of all payments received from members of the household and the balance of any existing commitments. |
| **Total number** | This field displays the count of all transactions included in the**Total revenue** or **Total** field. |
| **Total years with revenue** | This field displays the total number of years with at least one transaction per year included in the **Total revenue** or **Total** field. |

| Screen Item | Description |
|---|---|
| **Consecutive years with revenue** | This field displays the earliest year with a transaction included in the **Total revenue** or **Total** field, after which each consecutive year also includes at least one transaction included in the **Total revenue** or **Total** field. If there are no consecutive years with transaction included, "N/A" appears. |
| **First** | This is the earliest amount based on the transactions included in the **Total revenue** or **Total** field. |
| **Last** | This is the latest amount based on the transactions included in the **Total revenue** or **Total** field. |
| **Revenue by year** | If data for multiple years of giving exists, this section displays each year with revenue from the constituent appears, along with the total revenue, total revenue by household, and total number of transactions included for the year. |

For more information about revenue, revenue types, revenue filters, and recognition credits, see the *Revenue Guide*.

# Revenue History

To view a history of all of the revenue your organization received from the constituent, select the Revenue History tab. Under **Revenue history**, you can view a history of all revenue transactions or commitments associated with the constituent, such as gifts, pledges, pledge payments, and event registration fees. For a constituent group or household, you can view information about the revenue history of both the household or group and its members.

The grid maintains the relationship between revenue transactions and commitments, such as between a gift and its matching gift claim or between a pledge and its installment payments.

- To view a specific transaction related to another transaction, such as to view the payments related to a single pledge, in the **Group by** field, select Transaction and click **Apply**. The grid displays all transactions. Click the triangle next to the parent transaction to view related transactions. For example, when you click the triangle next to a transaction that has been split between designations, the split designation information displays.
- To view commitment information, such as event registration payment commitments, in the **Group by** field, select Commitment and click **Apply**. The grid displays all commitments. Click the triangle next to the parent commitment to view related commitments. For example, when you click the triangle next to a pledge that has a payment and a write-off associated with it, the payment and write-off information displays.

***Note:*** You can filter the information on the Revenue History tab by criteria such as date, revenue type, and transaction type. You can also use a revenue filter to determine the types of revenue transactions and applications to include in amounts. From the **Reporting filters** configuration task in *Revenue*, you can configure revenue filters. For example, you can create one filter to include all types of revenue transactions and applications and another to include only payments toward donations, pledges, and recurring gifts.

From the tab, you can view the record of a transaction associated with the constituent. In the grid, click the amount of the transaction to view. The selected revenue record appears.

For information about revenue, revenue types, and recognition credits, see the *Revenue Guide*.

# Recognition Summary

The Recognition Summary tab displays a cumulative summary of a constituent's recognition credits. For an individual constituent associated with a household, it displays the total recognition credits for the individual (left side of the tab) and for the household to which the constituent belongs (right side of tab). For a constituent household, it displays the total recognition credits for all household members.

You can filter the information that appears on this tab:

- You can filter the information by criteria such as date and whether to view the information based on calendar year or fiscal year. You can also select a recognition filter to determine the types of revenue transactions and applications to include in amounts.

  The **Sites** filter option allows you to view recognition summary information associated with a specific site. You can also filter by campaigns.

- For individual constituents who are household members, any selections in the filters apply to both the **Individual summary** and **Household summary** grids. The revenue data appears based on the individual and the household. For example, under **Individual summary**, the totals of recognition credit for the individual appear; under **Household summary**, the total of recognition credit for all members of the household appear.

***Note:*** From the **Reporting filters** configuration task in *Revenue*, you can configure revenue filters and recognition filters. For example, you can create one filter to include all types of revenue transactions and applications and another to include only payments toward donations, pledges, and recurring gifts. You can then create a recognition filter that will include recognition credit for only those transactions. The recognition filter can also include only specified recognition credit types.

| Screen Item | Description |
|---|---|
| **Total recognition** | This field appears for households and individual constituents not in a household. This field displays the total recognition credits the constituent has received, such as for spouse revenue. |
| **Total** | This field appears for individual constituents who are household members. Under **Individual summary**, this field displays the total recognition credit the individual receives for revenue. Under **Household summary**, this field displays the total recognition credit the household to which the individual belongs receives for revenue. |
| **Total number** | This field displays the count of all transactions included in the **Total recognition** or **Total** field. |

| Screen Item | Description |
|---|---|
| **Total years with recognition** | This field displays the total number of years with at least one recognition credit per year included in the **Total recognition** or **Total** field. |
| **Consecutive years with recognition** | This field displays the earliest year with a recognition credit included in the **Total recognition** or **Total** field, after which each consecutive year also includes at least one recognition credit included in the **Total recognition** or **Total** field. If there are no consecutive years with recognition credit included, "N/A" appears. |
| **First** | This field displays the earliest amount based on the recognition credit included in the **Total recognition** or **Total** field. |
| **Last** | This field displays the latest amount based on the recognition credit included in the **Total recognition** or **Total** field. |
| **Recognition by year** | If data for multiple years of giving exists, this section displays each year with recognition credit for the constituent appears, along with the total recognition, total recognition by household, and total number of recognition credit transactions included for the year. |

For more information about revenue, revenue types, and recognition credits, see the *Revenue Guide*.

# Recognition History

Recognition History on page 161With recognition credits, you can analyze a constituent's giving for recognition purposes such as donor walls, honor rolls, or giving club classifications. Recognition credits allow you to recognize someone other than the donor for a gift, or recognize the donor or another constituent for an amount other than the gift amount or over an extended period of time. You can also use recognition credits to recognize a donor for some recognition programs but not others. To view a history of the recognition credits associated with the constituent's gifts to your organization, select the Recognition History tab.

Under **Recognition history**, you can view the date, type, amounts recognized and given, and the donor associated with each recognition credit. For a constituent household, you can view information about the recognition credits of both the household and its members. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

***Note:*** You can filter the information on the Recognition History tab by things such as date. You can also use a recognition filter to determine the types of revenue transactions and applications to include in amounts. From the **Reporting filters** configuration task in *Revenue*, you can configure revenue filters and recognition filters. For example, you can create one filter to include all types of revenue transactions and applications and another to include only payments toward donations, pledges, and recurring gifts. You can then create a recognition filter that will include recognition credit for only those transactions. The recognition filter can also include only specified recognition credit types.

To view additional information about a transaction, click its amount under **Recognition history**. The record of the transaction appears.

# Recognition Programs

From *Constituents*, your organization may create recognition programs and constituent recognition processes. A constituent recognition process automatically calculates the donations received from constituents and awards themwith recognition when they achieve an applicable level of a recognition program. To view the recognition programs associated with a constituent, select the Recognition Programs tab within the Revenue tab..

Under **Recognition programs**, the recognitions the constituent has achieved appears. For each recognition, you can view its program name; status; expiration, join, and achievement dates; and total annual giving. You can also view how long the constituent has been a member of the program and the amount to donate to achieve the next level.

To view additional information about a recognition, such as its history or any recognition credit or benefits associated with the recognition, click its name under **Recognition programs**. The record of the constituent recognition appears. For information about the items on this record, see Constituent Recognition Record on page 164.

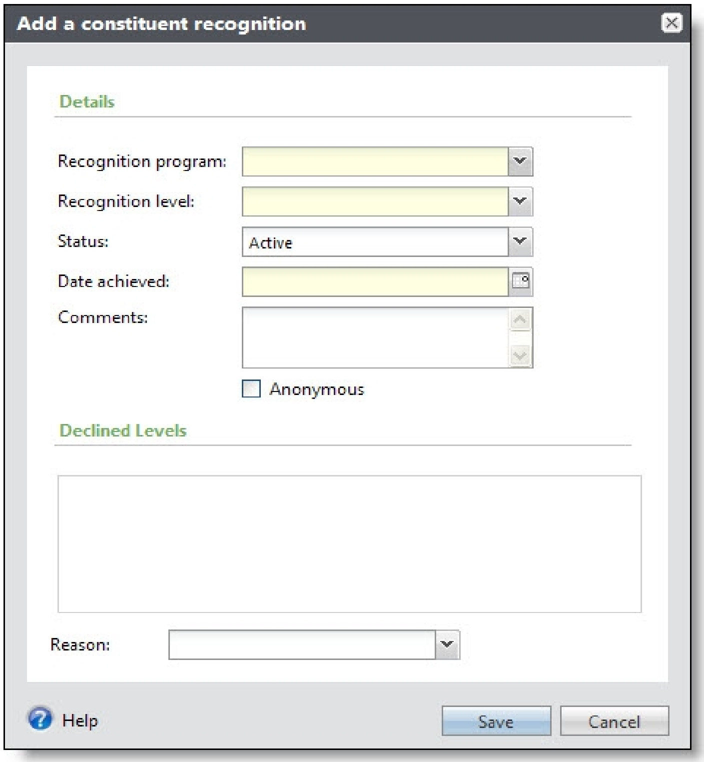
From the Recognition Programs tab, you can manually add and delete recognitions as necessary. You can also decline recognition program levels. If a constituent has declined a recognition program level, the Constituent recognition process will not include the constituent for that level, even if the constituent qualifies.

# Add Recognitions for a Constituent

Typically, a constituent recognition process automatically awards a constituent with a recognition, based on the level achieved of a recognition program. You can also manually add a recognition as necessary.

### Add a recognition for a constituent

1. Open the record of the constituent with the recognition to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Revenue tab.
3. Select the Recognition Programs tab inside the Revenue tab.
4. Under **Recognition programs**, click **Add**. The Add a constituent recognition screen appears.




***Note:*** You can also add a constituent recognition from the Recognition History tab of the recognition record. When you add a recognition from the recognition record, the **Recognition program** field is disabled. For information about the recognition record, see Constituent Recognition Record on page 164.

5. In the **Recognition program** and **Recognition level** fields, select the program and level of the recognition to award the constituent.
6. In the **Status** field, select whether the recognition is active or pending. For example, if you must first confirm that the constituent wants to receive recognition in the program, select Pending.
7. In the **Date achieved** field, select the date the constituent achieved the recognition.
8. In the **Comments** field, enter any additional information about the recognition.
9. If the constituent requests to receive the recognition anonymously, select **Anonymous**.
10. Under **Declined levels**, if the constituent wants to decline a level within the specified recognition program, select the recognition level to decline. You can also include a reason why the constituent declined the level.
11. Click **Save**. You return to the Recognition Programs tab.

## Delete a Constituent Recognition

After you add a recognition to a constituent, you can delete it as necessary. When you delete a recognition, you remove it from the constituent and delete its history from your database.

### Delete a recognition from a constituent

1. Open the record of the constituent with the recognition to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Revenue tab.
3. Select the Recognition Programs tab inside the Revenue tab.
4. Under **Recognition programs**, click **Delete** on the action bar of the recognition. A message appears to ask whether to delete the recognition and its history.

***Note:*** When a lifetime recognition exists for a constituent, a **Drop** button appears on the action bar. If you do not want to delete the lifetime recognition from the database, click **Drop**. The constituent drops from the lifetime recognition program, but the recognition history remains in the database. For information about recognition history, see Constituent Recognition Record on page 164.

5. Click **Yes**. You return to the Recognition Programs tab.

# Constituent Recognition Record

When you add a constituent recognition, the program automatically creates a record of the recognition. From the record, you can view and manage information about the recognition.

To access a recognition record from the Revenue and Recognitions page, click the name of the recognition program on the Recognition Programs tab.

At the top of the record, information about the recognition appears, including its status; expiration, join, and achievement dates; and total annual giving. You can also view how long the constituent has been a member of the program and the amount to donate to achieve the next level.

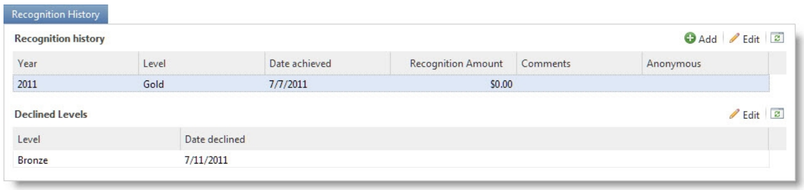
Under **Tasks**, you can manage the recognition as necessary.

- When the status for the recognition is Pending, to change the status from Pending to Active, click **Mark active**.
- When a lifetime recognition exists for a constituent, to remove the recognition from the constituent but retain the recognition and its history in the database, click **Drop recognition**.
- To delete a recognition from the constituent and the database, click **Delete recognition**.

From the tabs on the recognition record, you can view and manage history information about the constituent recognition. You can also view and manage the recognition credits and benefits associated with the recognition. To help you navigate through this information, the recognition record contains multiple tabs.

## Recognition History

To view a history of constituent recognition, such as the levels the constituent achieved with the recognition program, select the Recognition History tab. Under **Recognition history**, you can view the constituent's achievements in the recognition program, including the year, level, date, and revenue associated with each annual achievement. You can also view any comments entered about the recognition and whether the constituent requests to be recognized anonymously. To make sure the latest information appears, click **Refresh List** on the action bar.




Under **Recognition history**, you can add and edit achievements with the recognition program for the constituent.

Under **Declined levels**, you can edit declined levels for the recognition program.

# Edit Constituent Recognition History

From the Recognition History tab, you can edit the recognition awarded a constituent. When you edit a constituent recognition, you cannot edit its recognition program.

## Edit a constituent recognition

1. Open the record of the constituent with the recognition to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Programs tab.
4. Under **Recognition programs**, click **Go to recognition** on the action bar of the recognition to edit. The recognition record appears.
5. Select the Recognition History tab.
6. Under **Recognition history**, select the recognition to edit.
7. On the action bar, click **Edit**. The Edit constituent recognition history screen appears. The items on this screen are the same as the Add a constituent recognition screen. For information about the items on this screen, see Add Recognitions for a Constituent on page 162.
8. Edit the information as necessary.
9. Click **Save**. You return to the Recognition History tab.

# Edit Declined Levels

From the Recognition History tab, you can edit declined levels associated with a recognition program.

## Edit declined levels for a recognition program

1. Open the record of the constituent with the recognition to edit. For information about how to open a constituent record, see Constituent Search on page 61.

2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Programs tab.
4. Under **Recognition programs**, click **Go to recognition** on the action bar of the recognition to edit. The recognition record appears.
5. Select the Recognition History tab.
6. Under **Declined levels**, click **Edit**. The Edit declined levels screen appears.
7. Select the declined levels of the recognition program.
8. Click **Save**. You return to the Recognition History tab.

## Recognition Credit History

To view a history of the recognition credits associated with the constituent's revenue associated with the recognition program, select the Recognition Credit History tab. Under **Recognition credit history**, you can view information such as the date, type, recognition and gift amounts, donor associated with each recognition credit, and the designation.

To help find a specific recognition credit, you can filter the history information that appears in the grid. On the action bar, select the criteria of the recognition credit to view and click **Apply**. You can select to view recognition credits of a specific year or time frame. To remove the selected filters and display all interactions, click **Reset** on the action bar.

To view more information about the revenue transaction that generates a recognition credit, click its amount under **Recognition credit history**. The record of the transaction appears. For information about the items on this record, see the *Revenue Guide*.

## Benefits

To view the benefits associated with a constituent recognition, select the Benefits tab. Under **Benefits**, you can view the recognition level associated with each benefit. You can also view the date the constituent received each benefit, the quantity received, the unit and total value of each benefit, and any comments entered about the benefit.

From the grid, you can edit information about the benefits the constituent receives in association with the recognition.

### Edit the benefits for a constituent recognition

1. Open the record of the constituent with the recognition benefits to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Programs tab.
4. Under **Recognition programs**, click **Go to recognition** on the action bar of the recognition to edit. The recognition record appears.
5. Select the Benefits tab.

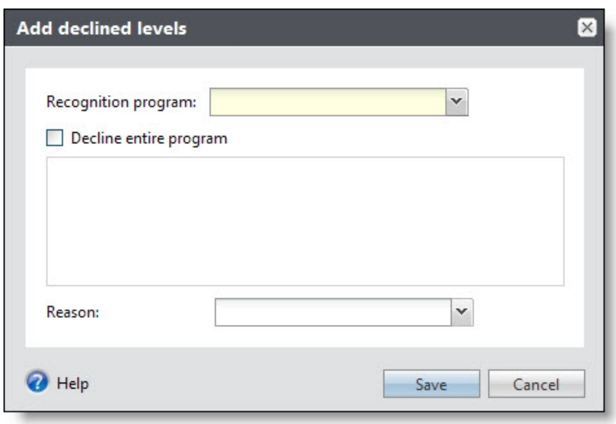
6. Under **Benefits**, click **Edit** on the action bar. The Edit benefits screen appears.
7. Enter or edit information about the benefits the constituent receives with the recognition.
8. Click **Save**. You return to the Benefits tab.

# Declined Recognition Levels

Constituents may decline to be included in recognition programs and levels, even before they qualify. From the Recognition Programs tab, you can specify any programs and levels that the constituent declines. The Constituent recognition process will not include constituents who have declined recognition levels. When a constituent declines a recognition level, you can specify a reason.

## Add a declined recognition level for a constituent

1. Open the record of the constituent with the recognition to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Programs tab.
4. Under **Declined recognition levels**, click **Add**. The Add declined levels screen appears.




5. Select the recognition program the constituent wants to decline.
6. Select **Decline entire program** if the constituent wants to decline all levels within the recognition program. Otherwise, select the specific levels to decline. You can also include a reason why the constituent declined the level.
7. Click **Save**. You return to the Recognition Programs tab.

## Edit a declined recognition level for a constituent

1. Open the record of the constituent with the recognition to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.

3. Select the Recognition Programs tab.
4. Under **Declined recognition levels**, select the declined program or level and click **Edit**. The Edit declined levels screen appears.
5. Select **Decline entire program** if the constituent wants to decline all levels within the recognition program. Otherwise, select the specific levels to decline. You can also include a reason why the constituent declined the level.
6. Click **Save**. You return to the Recognition Programs tab.

### Delete a declined recognition program for a constituent

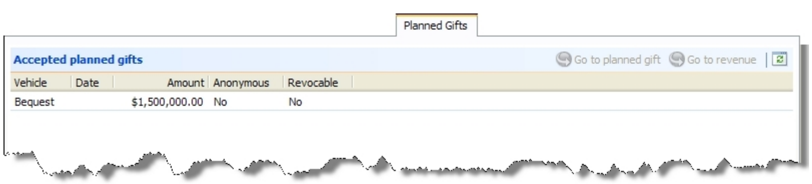
1. Open the record of the constituent with the recognition to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Programs tab.
4. Under **Declined recognition levels**, select the declined program and click **Delete**. A confirmation message appears.

> ***Note:*** When you delete a declined recognition program for a constituent, you delete the program and any levels within the program. To delete a recognition level within a declined program, edit the declined program and remove the level.

5. Click **Yes**. You return to the Recognition Programs tab.

# Planned Gifts

With planned gifts, donors can leave your organization money or assets upon their death or invest money so that they receive benefits during their life and then bequeath the remaining funds to your organization. To view the planned gifts of a constituent, select the Planned Gifts tab.



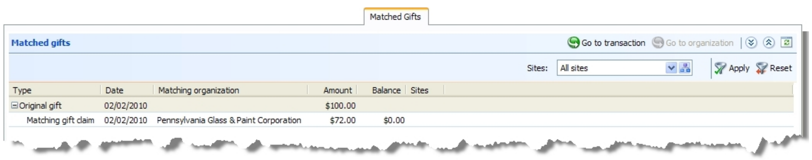

Under **Accepted planned gifts**, any planned gifts added for the constituent from a prospect record or plan in *Prospects* appears. If the constituent is listed as a planned gift relationship for another constituent, those planned gifts also appear.

To view the record of a planned gift, select it in the grid and click **Go to planned gift** on the action bar.

For more information about planned gifts, see the *Prospects Guide*.

# Matched Gifts

Some organizations match revenue their employees or corporate partners give to nonprofit organizations. If you receive a donation from an employee of an organization that matches gifts, you may receive the matching gift from the organization. To view the matched gifts of a constituent, select the Matched Gifts tab.



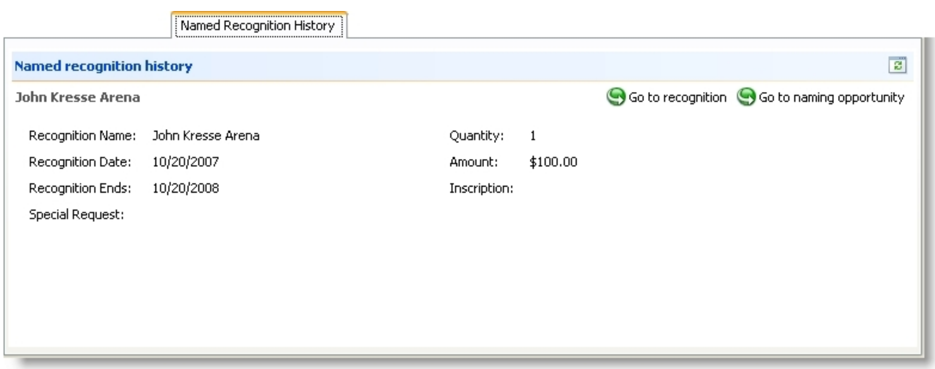

Under **Matched gifts**, any matched gifts for the constituent from the employer or other affiliated business appear.

To view the record of a matched gift, select it in the grid and click **Go to transaction** on the action bar. To view the constituent record of the matching organization, select its matching gift in the grid and click **Go to organization** on the action bar.

For more information about matching gifts, see the *Revenue Guide*.

# Named Recognition History

With naming opportunities, your organization can allow donors to place their name on a physical object of notable importance, such as bricks in a sidewalk or a plaque on a building, as an award for specific donation amounts. To view a history of the naming opportunities associated with the constituent, select the Named History Recognition tab.



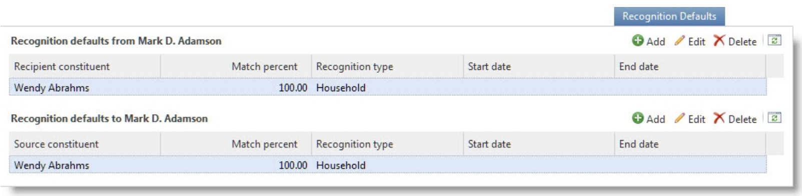

Under **Named recognition history**, you can view the name, dates, quantity, amount, and inscription associated with each naming opportunity. You can also view any special requests received from the constituent about the named recognition. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

To view additional information about a recognition, such as its history or any recognition credit or benefits associated with the recognition, click **Go to recognition** on the its action bar. The record of the constituent recognition appears. For information about the items on this record, see Constituent Recognition Record on page 164.

To view additional information about a naming opportunity, click **Go to naming opportunity** on its action bar under **Named recognition history**. The record of the naming opportunity appears. For information about the items on this record, see the *Fundraising Guide*.

# Recognition Defaults

With recognition defaults, you can define how the program assigns recognition credits to a constituent when your organization receives revenue from another constituent. For example, you can specify how recognition credits default to members of a household based on revenue received from another member of the household. To view the recognition credit defaults for a constituent, select the Recognition Defaults tab.




Under **Recognition defaults from Constituent**, you can view the constituents who automatically receive recognition credits for donations from the constituent. For each recognition credit recipient, you can view the percentage of the donation recognized, the recognition type, and the start and end dates of when the recipient receives the recognition. From the grid, you can also add and manage recognition credit defaults for revenue received from the constituent.

Under **Recognition defaults to Constituent**, you can view the constituents whose revenue automatically generate recognition credits for the constituent. For each source constituent, you can view the percentage of the donation recognized, the recognition type, and the start and end dates of when the constituent receives the recognition. From the grid, you can also add and manage recognition credit defaults to apply to the constituent.

***Note:*** On the Recognition Defaults tab, recognition defaults generated by a household setting appear gray. You cannot edit or delete a default generated by a household setting. Recognition defaults are determined by the household record itself or from global settings for your database.

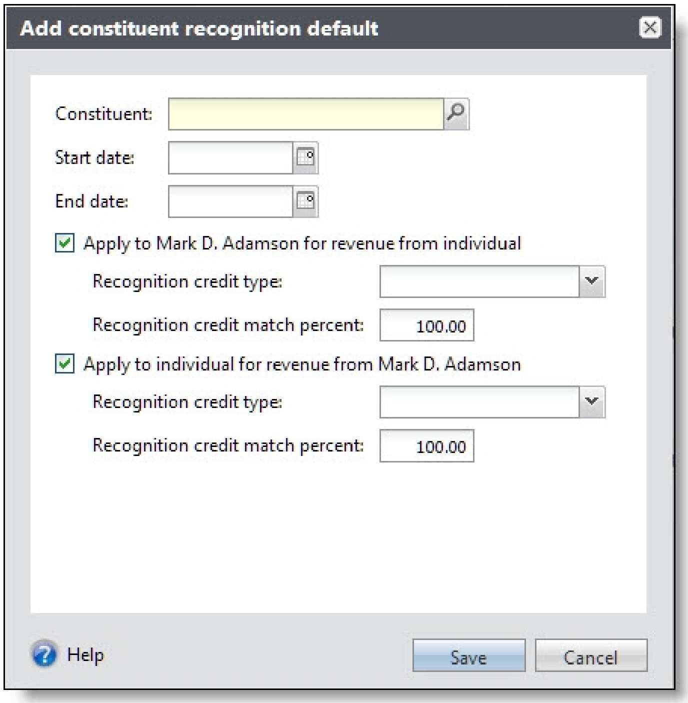
# Add Recognition Credit Defaults for Revenue from a Constituent

You can add recognition credit defaults so, when a constituent donates to your organization, other selected constituents automatically receive recognition credit for the revenue.

### Add a recognition credit default for donations received from a constituent

1. To add recognition credit defaults to other constituents based on revenue received from an individual, open the individual's constituent record. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Revenue tab, then the Recognition tab.

3. Under **Recognition defaults from Constituent**, click **Add**. The Add constituent recognition default screen appears. For information about the items on this screen, see Add Constituent Recognition Default Screen (for Revenue Received From Constituent) on page 171.




4. In the **Constituent** field, search for the individual to receive recognition credit for revenue received from the constituent.
5. In the **Start date** and **End date** fields, enter the time frame for which the selected constituent receives recognition credit. If the constituent should receive recognition credit for an undetermined length of time, leave the **End date** field blank.
6. Select whether to automatically apply recognition credit to each constituent for revenue received from the other. If you select to apply recognition credit to a constituent, specify the type and match percentage of recognition credit the constituent receives.
7. Click **Save**. You return to the Recognition Defaults tab.

   If you select **Apply to Constituent for revenue from individual**, the new recognition default appears under **Recognition defaults to Constituent**. If you select **Apply to individual for revenue from Constituent**, the new recognition default appears under **Recognition defaults from Constituent**.

## Add Constituent Recognition Default Screen (for Revenue Received From Constituent)

The table below explains the items on the Add constituent recognition default screen for revenue received from a constituent. For information about how to access this screen, see Add Recognition Credit Defaults for Revenue from a Constituent on page 170.

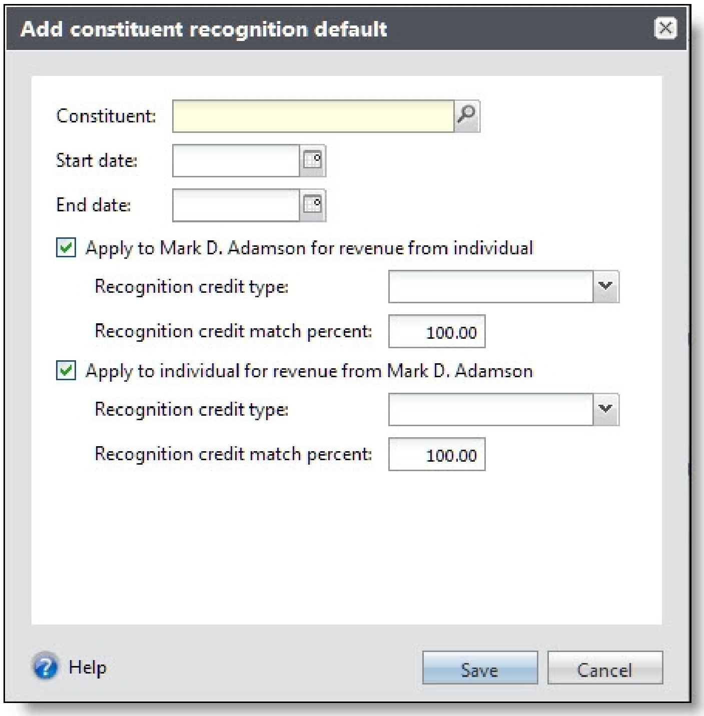
| Screen Item | Description |
|---|---|
| **Constituent** | Search for and select the individual to receive recognition credit for revenue from the constituent.<br>For information about how to search for a constituent, see Constituent Search on page 61. |
| **Start date** | Select the date on which the recognition credit default begins. |
| **End date** | Select the date on which the recognition credit default ends. If the default has an undetermined duration, leave this field blank. |
| **Apply to Constituent for revenue from individual** | To apply recognition credit to the constituent for revenue received from the individual, select this checkbox.<br>If you select this checkbox, select the type of recognition credit to apply, such as Household, and enter the percentage of the donation to apply as recognition credit. To credit the constituent with the full donation amount received from the individual, leave the default 100. |
| **Apply to individual for revenue from Constituent** | To apply recognition credit to the individual for revenue received from the constituent, select this checkbox.<br>If you select this checkbox, select the type of recognition credit to apply, such as Household, and enter the percentage of the donation to apply as recognition credit. To credit the individual with the full donation amount received from the constituent, leave the default 100. |

# Add Recognition Credit Defaults to a Constituent for Revenue from Other Constituents

You can add recognition credit defaults so a constituent automatically receives recognition credit when selected other constituents donate to your organization.

### Add a recognition credit default for a constituent for donations received from other constituents

1. To add recognition credit defaults based on revenue received from other constituents, open the constituent record. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Revenue tab, then the Recognition tab.
3. Under **Recognition defaults to [Constituent]**, click **Add**. The Add constituent recognition default screen appears. For information about the items on this screen, see Add Constituent Recognition Default Screen (for Revenue Received From Another Constituent) on page 173.




4. In the **Constituent** field, search for the individual with the revenue to generate recognition credit for the constituent.
5. In the **Start date** and **End date** fields, enter the time frame for which the constituent receives recognition credit based on revenue from the individual. If the constituent should receive recognition credit for an undetermined length of time, leave the **End date** field blank.
6. Select whether to automatically apply recognition credit to each constituent for revenue received from the other. If you select to apply recognition credit to a constituent, specify the type and match percentage of recognition credit the constituent receives.
7. Click **Save**. You return to the Recognition tab.

   If you select **Apply to Constituent for revenue from individual**, the new recognition default appears under **Recognition defaults to Constituent**. If you select **Apply to individual for revenue from Constituent**, the new recognition default appears under **Recognition defaults from Constituent**.

## Add Constituent Recognition Default Screen (for Revenue Received From Another Constituent)

The table below explains the items on the Add constituent recognition default screen for revenue received from another constituent. For information about how to access this screen, see Add Recognition Credit Defaults to a Constituent for Revenue from Other Constituents on page 172.

| Screen Item | Description |
|---|---|
| **Constituent** | Search for and select the individual with the revenue to generate recognition credit for the constituent.<br>For information about how to search for a constituent, see Constituent Search on page 61. |
| **Start date** | Select the date on which the recognition credit default begins. |
| **End date** | Select the date on which the recognition credit default ends. If the default has an undetermined duration, leave this field blank. |
| **Apply to Constituent for revenue from individual** | To apply recognition credit to the constituent for revenue received from the individual, select this checkbox.<br>If you select this checkbox, select the type of recognition credit to apply, such as Household, and enter the percentage of the donation to apply as recognition credit. To credit the constituent with the full donation amount received from the individual, leave the default 100. |
| **Apply to individual for revenue from Constituent** | To apply recognition credit to the individual for revenue received from the constituent, select this checkbox.<br>If you select this checkbox, select the type of recognition credit to apply, such as Household, and enter the percentage of the donation to apply as recognition credit. To credit the individual with the full donation amount received from the constituent, leave the default 100. |

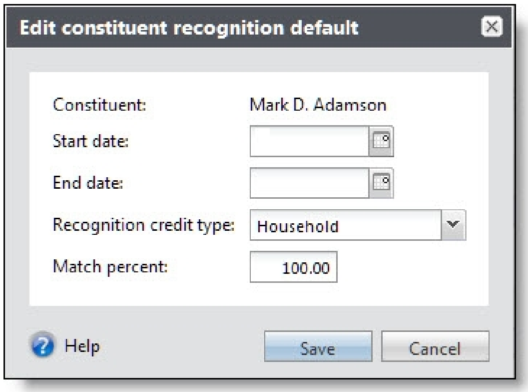
# Edit a Recognition Credit Default

After you add a recognition credit default, you can edit it as necessary. When you edit a recognition credit default, you can edit only the start and end dates and the recognition credit type and match percent. You cannot edit the recipient or source constituent.

***Note:*** You cannot edit a recognition credit default generated by a household setting.

## Edit a recognition credit default

1. Open the constituent with the recognition credit default to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Revenue tab, then the Recognition tab.
3. Select the recognition credit default to edit.
   - To edit a recognition credit default based on revenue received from the constituent, select the default under **Recognition defaults from Constituent**.
   - To edit a recognition credit default the constituent receives based of revenue received from another constituent, select the default under **Recognition defaults to Constituent**.
4. On the action bar, click **Edit**. The Edit constituent recognition default screen appears. The items on this screen also appear on the Add constituent recognition default screen. For information about the items on this screen, see Add Constituent Recognition Default Screen (for Revenue Received From Constituent) on page 171 or Add Constituent Recognition Default Screen (for Revenue Received From Another Constituent) on page 173.




5. Edit the information as necessary.
6. Click **Save**. You return to the Recognition Defaults tab.

## Delete a Recognition Credit Default

After you add a recognition credit default, you can delete it as necessary.

***Tip:*** To not apply a recognition credit default but still retain a history of the default, you can edit the default to enter an end date. For information about how to edit a recognition credit default, see Edit a Recognition Credit Default on page 174.

***Note:*** You cannot delete a recognition credit default generated by a household setting.

### Delete a recognition credit default

1. Open the record of the constituent with the recognition credit default to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Revenue and recognition**. The Revenue and Recognition page appears.
3. Select the Recognition Defaults tab.
4. Select the recognition credit default to delete.
   - To delete a recognition credit default based on revenue received from the constituent, select the default under **Recognition defaults from Constituent**.
   - To delete a recognition credit default the constituent receives based of revenue received from another constituent, select the default under **Recognition defaults to Constituent**.
5. On the action bar, click **Delete**. A message appears to ask whether to delete the default.
6. Click **Yes**. You return to the Recognition Defaults tab.

# Documentation and Interactions Tab

From the Documentation and Interactions tab, you can use secondary tabs to manage helpful and interesting information about your constituent records.

- From the **Constituent Documentation** tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.
- From the **Documentation Summary** tab, you can view and edit all note information in the database related to this constituent. When you edit existing note information from this location, the related functional area is also updated.
- From the **Surveys** tab, you can manage surveys and responses for the constituent. You can use this information to track the constituent's interests and satisfaction.
- From the **Interactions** tab, you can manage interactions and responses for the constituent. For example, you can add and edit information about meetings, telephone calls, email messages, and mailings.

# Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

## Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

### Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

#### Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

### Add an Attachment Screen

| Screen Item | Description |
| --- | --- |
| **Type** | Select the type of attachment. The system administrator configures attachment types. |

| Screen Item | Description |
|---|---|
| **Date** | Enter the date of the attachment. |
| **Title** | Enter the title, or purpose, of the attachment. |
| **Author** | To search for the author, click the binoculars. A search screen appears. |
| **File** | To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. |

## Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

### Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

## Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

### Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

# Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

## Add Media Links

When you add a media link, you enter the website address.

### Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

## Add a Media Link Screen

| Screen Item | Description |
|---|---|
| **Type** | Select the type of media link. The system administrator configures media link types. |
| **Date** | Enter the date of the media link. |
| **Title** | Enter the title, or purpose, of the link. |
| **Author** | To search for an author, click the binoculars. A search screen appears. |
| **Media URL** | Enter the URL for a website. |

## Edit Media Links

You can edit the URL for a website.

### Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

## Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

### Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

# Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

## Add Notes

On the Documentation tab, you can track notes about your records.

### Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

## Add a Note Screen

| Screen Item | Description |
|---|---|
| **Type** | Select the type of note. The system administrator configures note types. |
| **Date** | Enter the date of the note. |
| **Title** | Enter the title, or purpose, of the note. |
| **Author** | To search for an author, click the magnifying glass. A search screen appears. |
| **Notes** | Enter the content of the note. |

## Edit Notes

On the Documentation tab, you can edit notes as necessary.

### Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

## Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

### Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

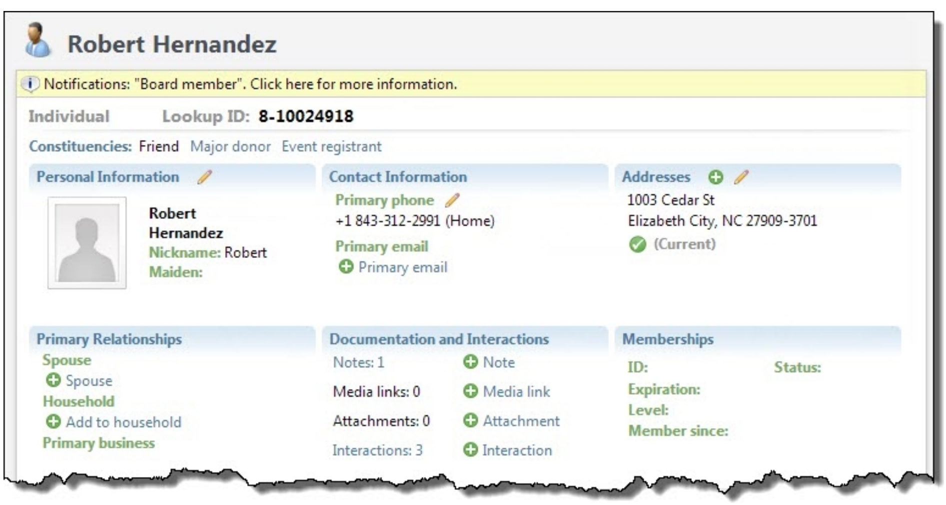
# Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Planned Gift records
- Research Group records
- Revenue records

Notifications appear on the information bar of a record.



**Note:** Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

## Add Notifications to Specific Records

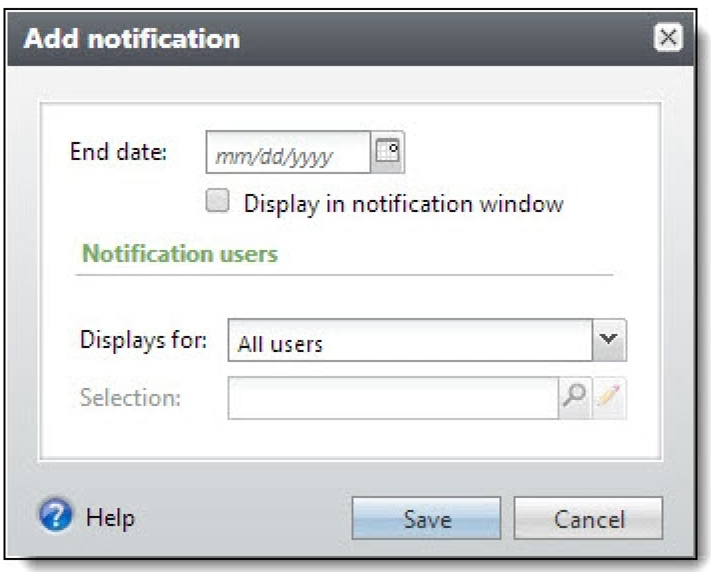
On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

### Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

**Note:** You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.




4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Click **Save**. You return to the Documentation tab.

## Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

### Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

***Note:*** To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

## Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

***Note:*** For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

## Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

# Documentation Summary

Under the Documentation and Interactions tab, the **Documentation Summary** tab provides all note information in the database related to this constituent - Revenue notes, Planned Gift notes, Interaction notes - so you can view and manage this information from one central location.

From **Documentation Summary**, you can edit existing note information. Any note information you edit from this location appears in the related functional area. For example, if you edit a revenue note from the Revenue list on the Documentation Summary tab, this information also appears on the Documentation tab of the constituent's revenue record.

# Survey Information

Your organization may use surveys to determine the interests or satisfaction of your constituents. From a the Documentation and Interactions tab of a constituent record, to manage the surveys the constituent participates in and track the constituent's responses, click **Surveys**. The **Surveys** tab for the constituent appears.

The Surveys tab displays detail information from the constituent record, such as contact information, lookup ID, and active constituencies. Under **Surveys**, you can view the surveys your organization has sent the constituent or the constituent has participated in. From this grid, you can also add and manage the surveys associated with the constituent.

When you add a constituent survey, the program automatically creates a record of the survey. From the Survey record, you can view and manage information about the survey such as related constituent responses and documentation.

## Surveys

On the **Surveys** tab for a constituent, the **Surveys** grid displays the surveys sent to or associated with the constituent.

To access the Surveys tab, from the Documentation and Interactions tab on a constituent record, click **Surveys**.

For each survey, you can view the date your organization sent the survey, the date the constituent responded, the name and category of the survey, and the number of questions included. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

To view a detail summary of the survey, select its row in the grid. Beneath the row, additional information appears, such as any comments entered about the survey. You enter this information when you manually add the survey to the constituent.

To help find a specific survey, you can filter the surveys that appear in the grid. On the action bar, select the criteria of the survey to view and click **Apply**. You can select to view surveys sent or responded to during a specific time frame, such as This year, This quarter, or Next week. If you select "<Specific date range>", enter the time period in the **Start date** and **End date** fields. To remove the selected filters and display all surveys, click **Reset** on the action bar.

To view additional information about a survey, such as any responses received from the constituent or any documentation associated with the survey, click its name in the grid. The record of the survey appears. For information about the items on this record, see Survey Record on page 186.

***Note:*** If you integrate with ***Blackbaud Internet Solutions*** and include a Survey part on your website, you can download responses from your online surveys. When you download survey responses from ***Blackbaud Internet Solutions***, the program automatically updates the Surveys page of the constituents who participate in the survey with a record of their participation and their respective responses. To indicate that the constituent entered the survey responses through your website, in the **Details** window, the **Comment** field displays "Generated by Blackbaud Internet Solutions".

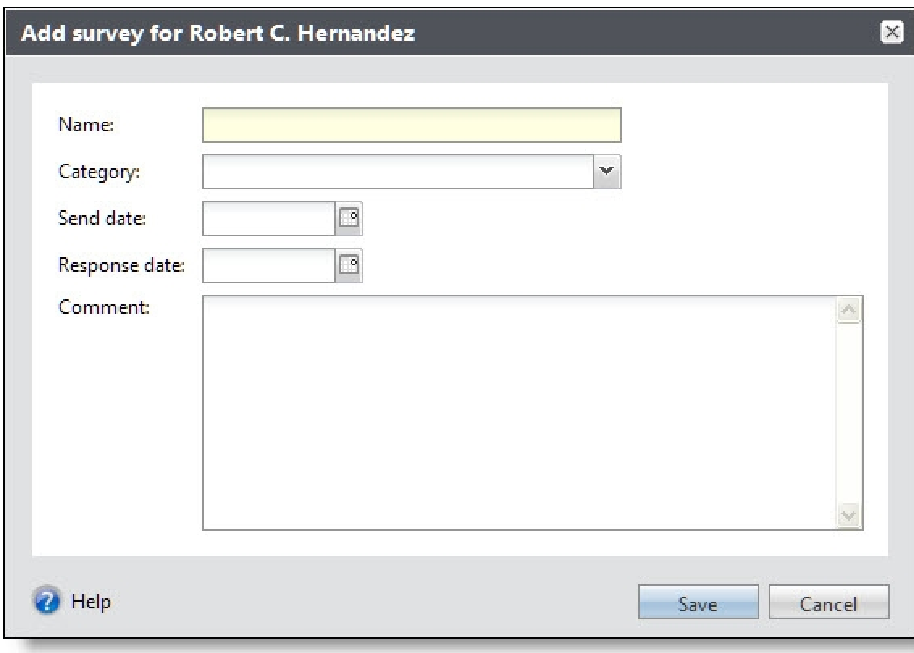
From the grid, you can add and manage the surveys associated with the constituent.

# Add Surveys to a Constituent

Your organization may use surveys to determine the interests or satisfaction of your constituents. When your organization receives survey responses from a constituent, you can add the survey to the constituent's record. When you add a survey to a constituent, the program automatically generates a record of the survey. From the constituent record, you can enter and track the responses received from the constituent. From the survey record, you can add documentation about the survey.

## Add a survey to a constituent

1. Open the record of the constituent with the survey to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Documentation and Interactions tab, click **Surveys**. The Surveys tab appears.
3. Under **Surveys**, click **Add**. The Add survey screen appears.




4. In the **Name** field, enter a name to help identify the survey, such as its title.
5. To further identify the survey, in the **Category** field, select the type of survey the constituent completed, such as Interests or Satisfaction. Your system administrator determines the selections available in the **Category** field.
6. In the **Send date** field, enter the date your organization made the survey available to the constituent. For example, enter the date your organization mailed the survey or posted it on your website.
7. In the **Response date** field, enter the date the constituent submitted the completed survey.
8. In the **Comment** field, enter any additional information about the survey, as necessary.

9. Click **Save**. The survey record appears so you can enter the survey questions and the responses received for each. For information about the survey record, see Survey Record on page 186.

## Edit a Survey Record

You can edit the information entered for a constituent's survey as necessary. For example, you can adjust the category selected for the survey or enter additional comments about the survey.

### Edit a survey record

1. Open the record of the constituent with the survey to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Documentation and Interactions tab, click **Surveys**. The Surveys tab appears.
3. Under **Surveys**, select the survey to edit. The row expands.
4. Click **Edit**, click **Edit survey**. The Edit survey screen appears. The items on this screen are the same as the Add survey screen. For information about the items on this screen, see Add Surveys to a Constituent on page 184.

***Note:*** To edit the survey from the survey record, under **Tasks**, click **Edit survey**.

5. Edit the information as necessary.
6. Click **Save**. You return to the Surveys tab.

## Edit Survey Responses

After you add a survey to a constituent's record, you can add and edit the survey questions and the responses your organization receives from the constituent.

### Add and edit survey responses received from a constituent

1. Open the record of the constituent with the survey responses to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Documentation and Interactions tab, click **Surveys**. The Surveys tab appears.
3. Under **Surveys**, select the survey with the responses to edit. The row expands.
4. Click **Edit**, **Edit responses**. The Edit responses screen appears.

***Note:*** To add or edit the responses from the survey record, such as when you first add the survey to the constituency, select the Responses tab and click **Edit responses** on the action bar.

5. In the **Survey question** column, enter the questions included in the survey.
6. For each question, in the **Response** column, enter the answer received from the constituent.
7. Click **Save**. You return to the Surveys tab.

## Delete a Survey Record

You can delete a survey from a constituent, such as if you inadvertently add a survey to the wrong constituent. When you delete a survey, you delete its record and responses from the constituent record.

### Delete a survey record

1. Open the record of the constituent with the survey to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Documentation and Interactions tab, click **Surveys**. The Surveys tab appears.
3. In the **Surveys** grid, select the survey to delete. The row expands.
4. Click **Delete**. A message appears to ask whether to delete the survey record.

***Note:*** From the survey record, under **Tasks**, you can also click **Delete**.

5. Click **Yes**. You return to the Surveys tab. In the grid, the survey no longer appears.

# Survey Record

When you add a survey to a constituent record, the program automatically creates a record of the survey. From the survey record, you can view and manage information about the survey. You can also view and manage the responses and documentation associated with the survey.

For a constituent record, go to the Documentation and Interactions tab. Then click **Surveys**. To access a survey record, click the name of the survey under **Surveys**.

At the top of the survey record, profile information about the constituent appears, including primary contact information, lookup ID, inactive status, and any active constituencies. You can also view and manage the responses and documentation associated with the survey. To help you navigate through this information, the survey record contains multiple tabs.

***Note:*** If you integrate with ***Blackbaud Internet Solutions*** and include a Survey part on your website, you can download responses from your online surveys. When you download survey responses from ***Blackbaud Internet Solutions***, the program automatically generates a record of the survey for the constituents who respond. To indicate that the constituent entered the survey responses through your website, the **Comment** field displays "Generated by Blackbaud Internet Solutions". Under Responses, the **Responses** grid displays the survey questions and constituent responses downloaded from the website.

From the grid, you can also edit or delete the survey record.

## Responses

To view the questions and answers associated with the constituent's survey, from a constituent record, select the Documentation and Interactions tab. Then click **Surveys**. The Surveys tab appears. From the list of surveys, click the name of the survey. The survey record appears. From the Responses tab, under

**Responses**, the **Survey question** column displays the questions entered for the survey. The **Response** column displays the constituent response entered for each question.

To add or edit information in the grid, click **Edit responses** on the action bar. For information about how to edit survey questions and responses, see Edit Survey Responses on page 185.

## Documentation

From a constituent record, the Documentation and Interactions tab includes a second tier of tabs for Constituent Documentation, Documentation Summary, Surveys, and Interactions. You can manage notes, notifications, media links, and file attachments for some of these tier two tabs.

You can use notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

For information about how to manage notes and other documentation for the Constituent Documentation, Surveys, and Interactions tabs, see Documentation on page 176.

## Go to Survey

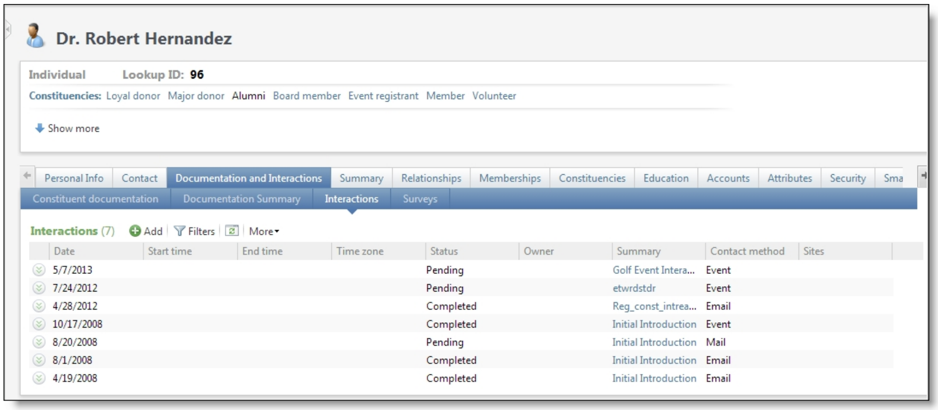
For a constituent record, go to the Documentation and Interactions tab. Then click **Surveys**. To access the record of a survey, click the name of the survey.

# Interaction Information

Interactions are specific communication activities and actions your organization takes to build a relationship and secure a donation from a constituent. Interactions can include meetings, telephone calls, email messages, and mailings. You can access a summary of the interactions your organization has with a constituent from the constituent record. From the Documentation and Interactions tab, click **Interactions**.The Interactions page for the constituent appears. You can view the interactions your organization has with the constituent, as well as add and manage the interactions, constituent responses, and documentation.

## Interactions

The Interactions tab for a constituent record displays the interactions your organization has with the constituent, such as meetings and mailings. To access the Interactions tab, from the Documentation and Interactions tab on constituent record, click **Interactions**.




For each interaction, you can view its date, its status, the owner of the interaction, a summary of interaction, and how the user contacted the constituent. The Interactions list by default is sorted by the earliest transaction date to the most recent.

To view a detailed summary of an interaction, select its row in the grid. Beneath the row,additional information appears, such as the participants involved in the interaction, the categories of the interaction, and any comments entered about the interaction. You enter this information when you manually add the interaction to the database.

To help find a specific interaction, you can filter the interactions that appear in the grid. On the action bar, click **Filter**, select the criteria of the interaction to view, and click **Apply**. You can select to view interactions of a specific type and during a specific time frame, such as This year, This quarter, or Next week. If you select "<Specific date range>", enter the time period in the **Start date** and **End date** fields. To remove the selected filters and display all interactions, click **Reset** on the action bar.

To view additional information about an interaction, such as any responses received from the person or any documentation associated with the interaction, click the summary of the interaction in the grid. The record of the interaction appears.

To view the record of the user who owns or performs an interaction with the person, click the name of the owner in the grid. The record for the interaction owner appears.

From the grid, you can add and manage interactions your organization has with the constituent.

## Add Constituent Interactions

You can manually add interactions associated with a constituent, such as a telephone conversation to discuss your organization's mission in detail. When you add an interaction, you can enter a summary or its objective, its expected and actual dates, and any comments or additional information about the interaction.

If a constituent is linked to a system user and that user adds an interaction to any constituent record, the interaction owner is automatically defaulted to the user adding the interaction. The user can change the interaction owner manually if needed.

***Note:*** If you have a large number of constituents to which you need to add information about pending or completed interactions you can use the Add constituent interaction global change definition available in **Manage Global Changes**. For information about working in **Manage Global Changes**, see the Global Change chapter in the *Administration Guide*.

## Add a constituent interaction

1. Open the record of the constituent with the interaction to add.
2. From the Documentation and Interactions tab, click **Interactions**. The Interactions tab for the constituent appears.
3. Under **Interactions**, click **Add**. The Add an interaction screen appears.
4. For a constituent group or household, the **Constituent** field appears. Select the member of the group or household to whom the interaction applies. If the interaction applies directly to the group, you may select the group.
5. In the **Summary** field, enter a short summary to help identify and describe the objective of the interaction.
6. In the **Status** field, select whether the interaction is pending, complete, declined, or canceled.
7. In the **Owner** field, search for and select the constituent to perform the interaction.

***Note:*** If a constituent is linked to a system user and that user adds an interaction to any constituent record, the interaction owner is automatically defaulted to the user adding the interaction. The user can change the interaction owner manually if needed.

8. If your organization uses categories to identify the objective of the interaction, such as Cultivation or Mission-related, select the applicable categories in the **Category** and **Subcategory** fields.
9. In the **Expected date** field, select the date on which the owner expects to perform the interaction.

   For a completed interaction, in the **Actual date** field, select the date the owner performed the interaction.
10. In the **Contact method** field, select how the interaction owner contacts the constituent, such as Phone call, Email, or Meeting.
11. If the interaction occurs at an event, in the **Event** field, search for and select the event to associate with the interaction.
12. In the **Time zone** field, select the time zone to associate with the start and end times.
13. In the **Location** field, you can select an existing address for the constituent record to use as the location, such as “Home” or “Work,” or you can select “Other” and then enter a different location or address.
14. To restrict use of the interaction to only selected sites at your organization, in the **Sites** grid, select the sites to access the interaction.
15. Under **Comment**, enter any comments or additional information about the interaction.
16. If the interaction involves additional constituents, under **Participants**, select the constituents involved. For example, if the constituent informs you his wife is also interested in the topic of the interaction, add his wife to the **Participant** grid.

***Note:*** Any of the constituent’s relationships can be interaction participants. Participants can include related household members and other individuals; related organizations such as the constituent’s personal business or place of employment; and any constituent group to which the constituent belongs.

17. Click **Save**. You return to the Interactions tab.

## Add Interaction Screen

The table below explains the items on the Add interaction screen. For information about how to access this screen, see Add Constituent Interactions on page 188.

| Screen Item | Description |
|---|---|
| **Constituent** | For a constituent group or household, select the group or member to whom the interaction applies. |
| **Summary** | Enter a summary to help identify the purpose or objective of the interaction. |
| **Status** | Select whether the interaction is pending, complete, declined, or canceled. |
| **Owner** | Click the binoculars and use the search screen to select the constituent to perform the interaction. For information about the search screen, see Constituent Search on page 61.<br><br>If a constituent is linked to a system user and that user adds an interaction to any constituent record, the interaction owner is automatically defaulted to the user adding the interaction. The user can change the interaction owner manually if needed. |
| **Category** and **Subcategory** | If your organization categorizes interactions, select the applicable categories for the interaction, such as Cultivation, Volunteer Opportunities, or Mission-related. |
| **Expected date** | Enter the date the owner expects to perform the interaction. |
| **Actual date** | If the interaction status is Completed, enter the date the owner performed the interaction. |
| **Event** | If the interaction occurs at an event, click the binoculars. The Event Search screen appears so you can select the event to associate with the interaction. |
| **Expected start time/Expected end time** | Enter the time you expect the interaction to begin. If you enter an **Expected start time**, you must enter an **Expected end time**. |
| **Expected end time/Actual end time** | Enter the time the interaction actually began. If you enter an **Actual start time**, you must enter an **Actual end time**. |
| **Time zone** | Select the time zone to associate with the start and end times. If you enter start and end time information, you must select a time zone. |

| Screen Item | Description |
|---|---|
| **Location** | You can select an existing address for the constituent record to use as the location, such as "Home" or "Work," or you can select "Other" and then enter a different location or address. |
| **Sites** | To restrict access to the interaction to only selected sites at your organization, select the sites to use the interaction. |
| **Comment** | Enter any additional comments or information about the interaction. |
| **Participants** | Select any additional constituents involved in the interaction. For information about constituent relationships, see Relationships on page 128. |

## Edit a Constituent Interaction

After you add an interaction for a constituent, you can edit it as necessary.

### Edit an interaction

1. Open the record of the constituent with the interaction to edit.
2. From the Documentation and Interactions tab, click **Interactions**. The Interactions tab for the record appears.
3. Under **Interactions**, select the interaction to edit. The row expands.
4. Click **Edit interaction**. The Edit interaction screen appears. The items on this screen are the same as the Add interaction screen.

***Note:*** To edit an interaction from its record, select the Details tab and click **Edit** on the action bar.

5. Edit the information as necessary.
6. Click **Save**. You return to the Interactions tab.

## Edit Constituent Responses to an Interaction

After you interact with a constituent, you can add and manage the constituent's responses to the interaction. For example, if you send the constituent a letter with a response card, you can add the answers received on the completed response card.

***Note:*** Before you can edit responses to an interaction, your organization must set up the available response categories. For information about how to configure response categories, see the *Marketing and Communications Guide*.

### Edit constituent responses to an interaction

1. Open the record of the constituent with the response to edit. For information about how to open a constituent record, see Constituent Search on page 61.

2. From the Documentation tab and Interactions tab, click **Interactions**. The Interactions tab for the constituent appears.
3. Select the interaction with the responses to edit. The row expands.
4. Click **Edit responses**. The Edit Responses screen appears.

***Note:*** To edit the responses from an interaction record, select the Responses tab and click **Edit responses** on the action bar. For information about the interaction record, see Interaction Record on page 192.

5. Select the date, category, and answer applicable for each response. For example, you request a constituent select which upcoming volunteer opportunities interest her. When the constituent responds, enter the date you receive the response and select the category and response applicable to the answer received.
6. Click **Save**. You return to the Interactions tab.

***Note:*** The responses entered for an interaction appear on the Responses tab of the interaction record. For information about this record, see Interaction Record on page 192.

## Delete a Constituent Interaction

After you add an interaction, you can delete it from the constituent as necessary.

### Delete an interaction

1. Open the record of the constituent with the response to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Documentation and Interactions tab, click **Interactions**. The Interactions tab for the constituent appears.
3. Select the interaction to delete. The row expands.
4. Click **Delete**. A confirmation message appears.
5. Click **Yes**. You return to the Interactions tab.

# Interaction Record

When you add a constituent interaction, the program automatically creates a record of the interaction. From the interaction record, you can view and manage information about the interaction.

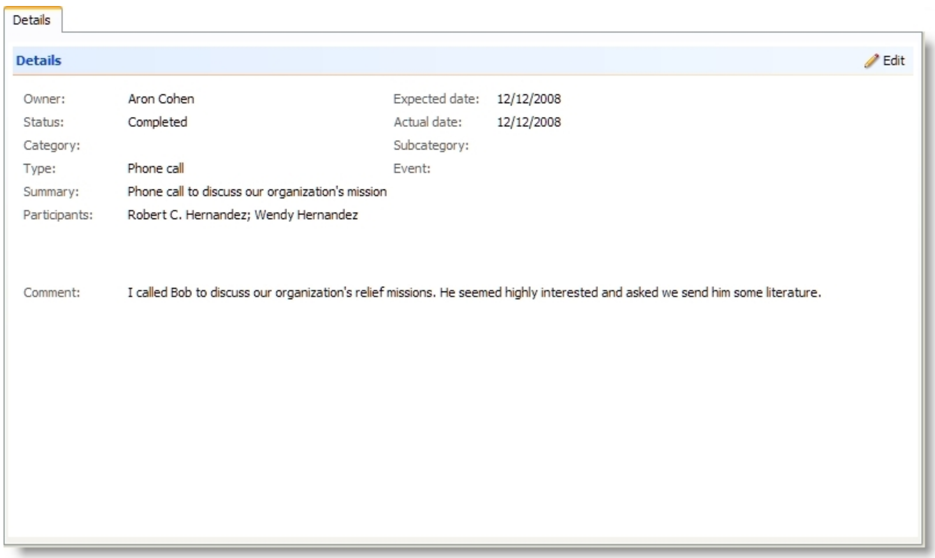
To access an interaction record, from the constituent record, select the Documentation and Interactions tab. Then click **Interactions**. The Interactions tab appears. Select the interaction from the list. The row expands to display information additional information. From the grid on the Interactions tab, click the interaction summary.

You can view and manage detail information about the interaction. You can also view and manage the responses and documentation associated with the interaction.

***Note:*** To delete an interaction from the constituent record , click **Delete** on the action bar. For information about how to delete an interaction, see Delete a Constituent Interaction on page 192.

## Details

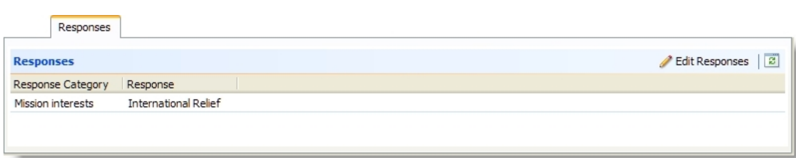
To view specific detail information entered about an interaction, from the interaction record, select the Details tab. Under **Details**, information entered about the interaction such as owner, dates, status, and categories appear. You can also view any comments or additional information entered about the interaction.




To edit the information that appears on this tab, click **Edit** on the action bar. The Edit interaction screen appears. For more information about how to edit an interaction, see Edit a Constituent Interaction on page 191.

## Responses

To view the responses received from the constituent interaction, select the Responses tab. Under **Responses**, you can view its category and answer associated with each response. To make sure the latest information appears, click **Refresh List** on the action bar.




To add or edit responses to the interaction, click **Edit Responses** on the action bar. The Edit responses screen appears. For more information about how to edit interaction responses, see Edit Constituent Responses to an Interaction on page 191.

## Documentation

From a constituent record, the Documentation and Interactions tab includes a second tier of tabs for Constituent Documentation, Documentation Summary, Surveys, and Interactions. You can manage notes, notifications, media links, and file attachments for some of these tier two tabs.

You can use notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

For information about how to manage notes and other documentation for the Constituent Documentation, Surveys, and Interactions tabs, see Documentation on page 176.

## Attributes

You can use attributes to store specialized information about a constituent interaction when no field or tab exists for that information. Attributes help track the information that best meet your organization's needs. For example, you may use attributes to record where the constituent prefers to meet for meetings or interests of the constituent discussed during the interaction. To view the attributes associated with an interaction, from the interaction record, select the Attributes tab.

***Note:*** The Attributes tab appears only if your system administrator configured applicable attributes. For information about how to add attribute categories, see the *Administration Guide*.

Under **Attributes**, you can view attributes assigned to the interaction. For each attribute, you can view its value, group, and valid date range. You can also view any comments entered about the attribute. From the grid, you can also manage the attributes assigned to the interaction.

Add attributes for a constituent interaction

1. On the record of the interaction to which to add an attribute, select the Attributes tab

   ***Tip:*** To access an interaction record, from the Documentation and Interactions tab on a constituent record, click **Interactions**. The Interactions tab appears. From the list of interactions, click the summary for the interaction record. The interaction record appears.

2. Under **Attributes**, click **Add** on the action bar. The Add constituent interaction attribute screen appears.
3. In the **Category** field, select the type of attribute to assign to the interaction. Your organization sets up attribute categories in *Administration*.
4. In the **Value** field, enter or select the value of the attribute to assign to the interaction.
5. If the attribute applies to the interaction for a specific duration, select the start and end dates of the attribute.
6. In the **Comment** field, enter any additional information to record about the attribute.
7. Click **Save**. You return to the Attributes tab.

Edit a constituent interaction attribute

1. On the record of the interaction with the attribute to edit, select the Attributes tab.

   ***Tip:*** To access an interaction record, from the Documentation and Interactions tab on a constituent record, click **Interactions**. The Interactions tab appears. From the list of interactions, click the summary for the interaction record. The interaction record appears.

2. Under **Attributes**, select the attribute to edit and click **Edit** on the action bar. The Edit constituent interaction attribute screen appears. The items on this screen are the same as the Add constituent interaction attribute screen.
3. Edit the information as necessary.
4. Click **Save**. You return to the Attributes tab.

Delete a constituent interaction attribute

After you add an attribute to an interaction, you can delete it as necessary.

1. On the record of the interaction with the attribute to delete, select the Attributes tab.

> ***Tip:*** To access an interaction record, from the Documentation and Interactions tab on a constituent record, click **Interactions**. The Interactions tab appears. From the list of interactions, click the summary for the interaction record. The interaction record appears.

2. Under **Attributes**, select the attribute to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the attribute,
4. Click **Yes**. You return to the Attributes tab.

## Edit an Interaction Lookup ID

The program automatically assigns a lookup ID to each interaction you enter for a constituent. This identifier appears in the Lookup ID display on the interaction record. You can use this information when you import and export information.

### Edit an interaction lookup ID

1. Access the record of the interaction with the lookup ID to edit.

> ***Tip:*** To access an interaction record, from the Documentation and Interactions tab on a constituent record, click **Interactions**. The Interactions tab appears. From the list of interactions, click the summary for the interaction record. The interaction record appears.

2. Under **Tasks**, click **Edit interaction lookup ID**. The Edit interaction lookup ID screen appears.
3. Edit the lookup ID as necessary.
4. Click **Save**. You return to the interaction record.

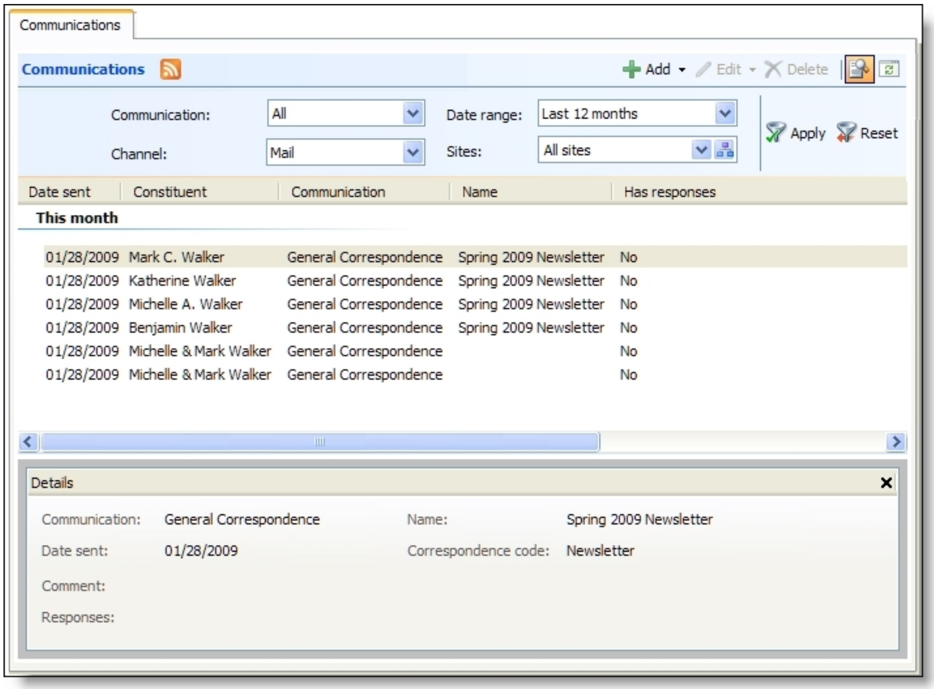
# Communications Information

To view a snapshot of your organization’s communication with a constituent from the constituent's record, select the Communications tab. Then click **Communications**. You can manage all the communication your organization has with the constituent. The Communications tab records any process or action that generates a communication with the constituent, such as a mailing.

You can also view and manage the various communications and appeal mailings that include the constituent and how the constituent prefers to receive communication. To help you navigate through this information, the Communications tab includes tiered tabs.

# Communications

From the Communications tab on a constituent record, you can view all mail and email communication your organization has with the constituent. From the grid, you can manually add and manage communications such as appeals. You cannot manually add email. Email communication sent to the constituent, including email from ***Blackbaud Internet Solutions***, automatically appears in the grid.




Under **Communications**,your communications with the constituent appear. For each communication, you can view the date of the communication, its type and channel, and whether the constituent responded to the communication. For a constituent group or household, the **Constituent** column appears and displays the member who receives the communication.

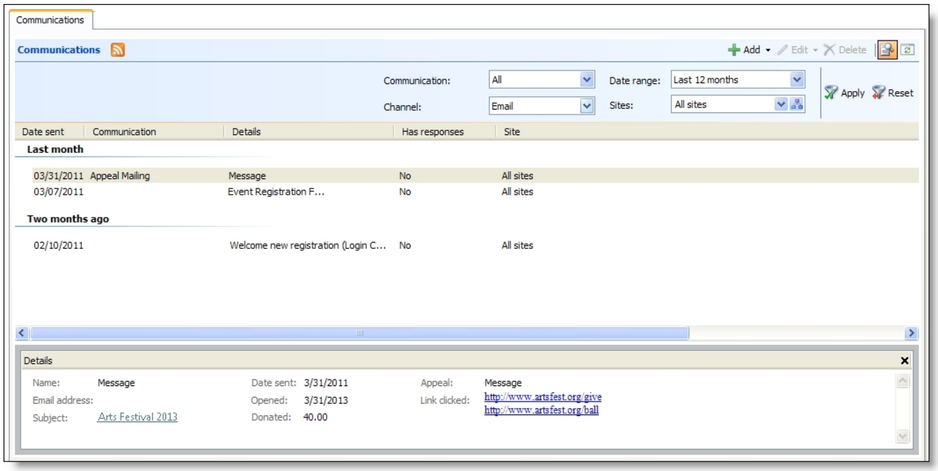
To help find a specific communication, you can filter the grid by criteria such as type or channel. In the filter fields, select the criteria of the communications to display and click **Apply**. To remove the filter, click **Reset**. To make sure the grid displays the latest information, click **Refresh List**.

For a mail communication, the **Name** column appears when the program generated the communication as part of a process.

To view additional information about a mail communication, select its row in the grid. Beneath the row, additional details appear. If the constituent responded to the mail, the **Responses** field displays the response. When you select a mail communication that was manually added to the constituent record and contains comments, the **Comments** field displays the comments entered.

To access the status page of a communication process, click its name under **Communications**.

For an email communication, you can view information about the communication your organization sends to the constituent. The **Details** column lists the subject of the email sent to the constituent.




To view additional information about an email communication, select its row in the grid. Beneath the row, details about the communication appear, including the date it was sent; whether its delivery was unsuccessful; the email address it was sent to; whether the constituent opened the email, clicked a link in it, or made a donation to your organization in response to it; and the subject of the email.

The total in the **Donated** field only includes donations from ***Blackbaud Internet Solutions***. It does not include membership or event payments.

Depending on your system role and security rights, you can view the message report online for email from ***Blackbaud Internet Solutions***. To view the message report, select its row in the grid and then click the link in the **Subject** field.

***Tip: Blackbaud Internet Solutions*** email is associated with the Appeal Mailings or Online Confirmations communication types. Email messages and email campaigns are associated with the Appeal Mailings type. Automatically generated email messages, such as an acknowledgement sent when a user submits a donation, are associated with the Online Confirmationstype .

# Add General Correspondence for a Constituent

From a constituent record, you can manually add a correspondence to indicate that the communication occurred. For example, you can record a personal letter written to thank a constituent for lunch. Select the Communications tab and then click **Communications**.

## Add a mailing for a constituent

1. From the constituent's record, select the Communications tab. Then click **Communications**.
2. Under **Communications**, click **Add** on the action bar and select **Add general correspondence**. The Add general correspondence screen appears.
3. In the **Correspondence code** field, select the code to associate with the correspondence.
4. Select the date you sent the correspondence to the constituent.
5. In the **Comments** field, enter any additional notes about the correspondence, such as an explanation or description of the communication.
6. Click **Save**. You return to the Communications tab.

# Edit a General Correspondence Record for a Constituent

From a constituent record, you can edit a general correspondence record that was manually added for a constituent. Select the Communications tab and then click **Communications**.

### Edit a general correspondence record for a constituent

1. From the constituent's record, select the Communications tab. Then click **Communications**.
2. Under **Communications**, select the general correspondence to edit.
3. On the action bar, click **Edit** and select **Correspondence**. The Edit general correspondence screen appears. The items on this screen are the same as the Add general correspondence screen. For information about the items on this screen, see Add General Correspondence for a Constituent on page 197.
4. Adjust the information as necessary.
5. Click **Save**. You return to the Communications tab.

# Delete a General Correspondence Record from a Constituent

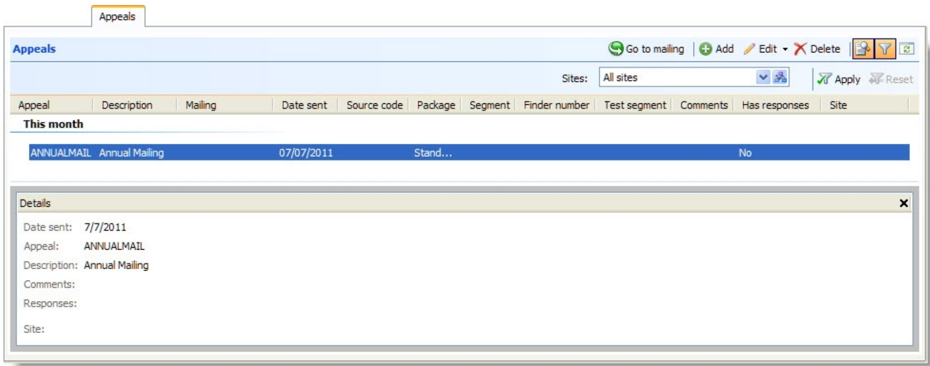
From a constituent record, you can delete a general correspondence record that was manually added for a constituent. Select the Communication's tab and then click **Communications**.

### Delete a general correspondence record for a constituent

1. From the constituent's record, select the Communications tab. Then click **Communications**.
2. Under **Communications**, select the correspondence to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the correspondence record.
4. Click **Yes**. You return to the Communications tab.

# Appeals

Appeals are planned efforts your organization performs to contact constituents and generate gifts, such as direct mailings, phonathons, dinners, and auctions. Typically, an appeal occurs within a specific time period and has a monetary goal. From the constituent record, select the Communications tab and then click **Appeals**. The appeal mailings your organization sends the constituent appear.



Under **Appeals**, you can view information about each appeal, such as its date, mailing, and package. You can also view whether the constituent responded to the appeal. To display the latest information in the grid, click **Refresh List** on the action bar.

To view additional information about an appeal, select its row under **Appeals**. Beneath the row, details about the appeal appear, such as its description and send date. For an appeal that was manually added to the constituent record and contains comments, the **Comments** field displays the comments entered. If the constituent responded to the appeal, the **Responses** field displays the response.

To access the status page of an appeal mailing process, click its name under **Appeals**.

From the grid, you can add and manage the appeals sent to the constituent.

# Add Appeal Mailings for a Constituent

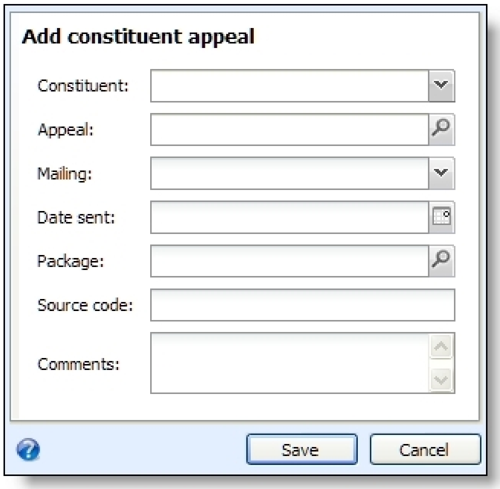
You can manually add an appeal mailing to a constituent record, such as if you send an appeal to a constituent outside of a larger mailing. From the constituent record, select the Communications tab and then click **Communications** or **Appeals**.

When you manually add an appeal mailing, you can associate it with an existing mailing or package or assign a source code to track revenue.

## Add an appeal mailing record for a constituent

1. On the constituent record, select the Communications tab.
2. Click **Appeals**.
3. Under **Appeals**, click **Add**. The Add constituent appeal screen appears. For information about the items on this screen, see Add Constituent Appeal Screen on page 200.

***Note:*** You can also add an appeal mailing from the Communications tab. On the action bar, click **Add** and select **Add appeal mailing**.




4. For a constituent group or household, select which constituent—the group or household, or one of its members—receives the appeal.
5. In the **Appeal** field, search for and select the appeal to associate with the constituent.
6. If the appeal is associated with a mailing, in the **Mailing** field, select the appeal mailing the constituent receives.
7. In the **Date sent** field, select the date you send the appeal to the constituent.
8. To associate a package with the mailing, in the **Package** field, search for select the package.
9. To track the appeal, in the **Source code** field, enter the source code to use to identify the appeal.
10. In the **Comments** field, enter any additional information about the appeal.
11. Click **Save**. You return to the Appeals tab.

## Add Constituent Appeal Screen

The table below explains the items on the Add constituent appeal screen. For information about how to access this screen, see Add Appeal Mailings for a Constituent on page 199.

| Screen item | Description |
|---|---|
| **Constituent** | For a constituent household, this field appears. Select the constituent that receives the appeal. |
| **Appeal** | Appeals are planned efforts your organization undertakes to contact constituents and generate gifts. They usually are bound by a time period and have a monetary goal. You can set up appeals such as direct mailings, phonathons, dinners, and auctions.<br>Search for and select the appeal to add to the constituent. |
| **Mailing** | If the appeal is associated with an appeal mailing, select the mailing the constituent receives. |

| Screen item | Description |
|---|---|
| **Date sent** | Select the date you send the appeal to the constituent. |
| **Package** | Packages are the various pieces of mail available for a mailing. For example, your organization may have a glossy calendar package for the best donors and prospects, as well as a glossy brochure, standard brochure, and postcard.<br>To associate a package with the appeal, search for select the package the constituent receives. |
| **Source code** | To help track the effectiveness of the appeal, enter a source code to identify the appeal. A source code is a series of letters or numbers included on a mailing to identify the list, offer, package, segment, and media used with the appeal. |
| **Comments** | Enter any additional information to associate with the appeal. |

# Edit an Appeal Mailing Record for a Constituent

You can edit an appeal mailing that was manually added for a constituent.

### Edit an appeal mailing record

1. On the constituent record, select the Communications tab.
2. Click **Appeals**.
3. Under **Appeals**, select the appeal mailing to edit.
4. Click **Edit constituent appeal**. The Edit constituent appeal screen appears. The items on this screen are the same as the Add constituent appeal screen. For information about the items on this screen, see Add Constituent Appeal Screen on page 200.

***Note:*** You can also edit an appeal mailing from the Communications tab. Under **Communications**, select the appeal mailing to edit. On the action bar, click **Edit** and select **Correspondence**. The Edit constituent appeal screen appears.

5. Edit the information as necessary.

***Note:*** You can edit only appeal mailings that were manually added to the constituent record. You cannot edit an appeal mailing generated when the program runs a process.

6. Click **Save**. You return to the Appeals tab.

# Edit Responses Received from a Constituent Communication

If you include a response card in a communication, you can track the responses received from the constituent. For example, if you ask whether a constituent is interested in volunteer work at your organization and the constituent returns the completed response card, you can enter the response on the Communications tab for the constituent.

### Edit the responses for a constituent communication

1. On the constituent record, select the Communications tab.
2. To edit responses for a general correspondence, click **Communications**.

   To edit responses for an appeal mailing, click **Appeals**.
3. In the grid, select the communication with the responses to enter or edit.
4. Click **Edit responses**. The Edit responses screen appears.
5. Enter information about each response received from the communication.
   a. In the **Date** column, enter the date you receive the response.
   b. In the **Category** column, select the category for the response such as Volunteer Interest. Your organization configures response categories in *Administration*.
   c. Select the constituent's response or response code, such as Yes.
6. Click **Save**. You return to the Communications tab.

   In the grid, the **Has responses** column displays "Yes". In the **Details** window, the **Responses** field displays the responses received.

## Delete an Appeal Mailing Record from a Constituent

You can delete an appeal mailing record that was manually added for a constituent.

### Delete an appeal from a constituent

1. On the constituent record, select the Communications tab.
2. Click **Communications** or **Appeals**.
3. In the grid, select the appeal to delete.

> ***Note:*** You can also delete an appeal from the Communications tab. Under **Communications**, select the appeal mailing to delete and click **Delete** on the action bar.

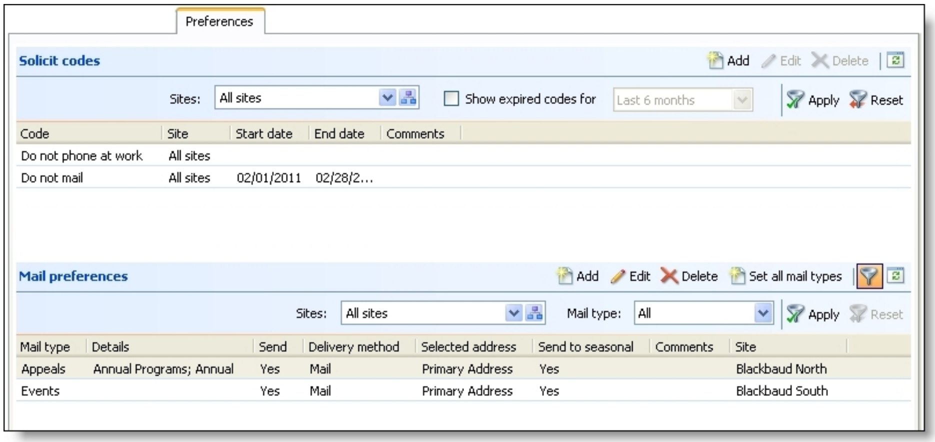
4. On the action bar, click **Delete**. A message appears to ask whether to delete the appeal.

> ***Note:*** You can delete only appeal mailings hat were manually added to the constituent record. You cannot delete an appeal mailing generated when the program runs a process.

5. Click **Yes**. You return to the Communications tab.

## Preferences

From a constituent record, you can manage the communication preferences for the constituent. Communication preferences help ensure your organization communicates with constituents in ways they prefer. Select the Communications tab and then click **Preferences**.




On the Preferences tab, the **Solicit codes** and **Mail preferences** grids display the communication preferences set up for the constituent. From these grids, you can manage the communication preferences of the constituent.

# Solicit Codes

Solicit codes allow constituents to globally opt out of solicitations and communications. For example, for constituents who do not want to receive email of any type, you can configure a “Do not email” solicit code and assign it to the Communications tab of their constituent records. When you run a marketing effort, you can exclude constituents based on solicit codes. For example, you can exclude constituents with a "Do not email" solicit code from all email blasts or constituents with a "Do not call" solicit code from all telemarketing efforts.

From a constituent record, you can manage the constituent’s solicit codes. Select the Communications tab and then click **Preferences**. In the **Solicit codes** grid, you can view the solicit codes assigned to the constituent. For each solicit code, you can view its duration and any comments entered.

***Note:*** To define more nuanced rules for solicitations and communications, use mail preferences or constituent attributes. For example, you can set mail preferences for a constituent who wants to receive appeals by mail, but receipts by email. You can create even more precise mail preferences, for example, a constituent wants to receive invitations to sporting events, but not auctions. For custom rules that cannot be configured through mail preferences, create constituent attributes. For example, if a constituent does not want the calendar that is typically mailed with the holiday appeal, you can create an attribute for "Include no calendar."

## Assign Solicit Codes to a Constituent

From a constituent record, you can assign solicit codes to the constituent. Select the Communications tab and then click **Preferences**.

### Add a solicit code for a constituent

1. On the constituent’s record, select the Communications tab. Then click **Preferences**.
2. Under **Solicit codes**, click **Add** on the action bar. The Assign solicit code screen appears.

3. Select the solicit code exclusion to assign to the constituent. For example, if the constituents requests to not receive email from your organization, select Do not email. When you run an email communications process and select to exclude constituents with this solicit code, the program automatically removes the constituent from the process.
4. In the **Start date** field, enter the date the solicit code begins.
5. To assign the solicit code to the constituent only temporarily, in the **End date** field, enter the date the solicit code ends. If the solicit code does not have an end date, such as to permanently assign the solicit code to the constituent, leave this field blank.

***Note:*** When you run a mailing process, the program uses only solicit codes that are valid as of the run date to exclude constituents from the process.

6. In the **Comments** field, enter any notes about the constituent's solicit code as necessary.
7. Click **Save**. You return to the Preferences tab.

## Edit a Solicit Code for a Constituent

From a constituent record, you can edit the solicit codes assigned to the constituent. Select the Communications tab and then click **Preferences**.

### Edit a solicit code for a constituent

1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Solicit codes**, select the solicit code to edit.
3. On the action bar, click **Edit**. The Edit solicit code screen appears. The items on this screen are the same as the Assign solicit code screen. For information about the items on this screen, see Assign Solicit Codes to a Constituent on page 203.
4. Edit the information as necessary.
5. Click **Save**. You return to the Preferences tab.

## Delete a Solicit Code from a Constituent

From a constituent record, you can delete solicit codes from the constituent, such as if it is no longer applicable. Select the Communications tab. Then click **Preferences**.

### Delete a solicit code from a constituent

1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Solicit codes**, select the solicit code to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the solicit code.
4. Click **Yes**. You return to the Preferences tab.

# Mail Preferences

To respect a constituent's communication preferences, you can use constituents' mail preferences. For example, a constituent may request to receive appeal mailings at the primary home address and revenue acknowledgments at the primary email address. From a constituent record, you can manage the constituent's communications preferences. Select the Communications tab and then select **Preferences**.

Under **Mail preferences**, you can view the mail preferences assigned to the constituent. For each preference, you can view its applicable criteria and whether to send communications that meet the criteria to the constituent. If the **Send** column displays Yes, the preferred channel, or delivery method, and address type appear. You can also view any comments entered about the preference.

You can filter the preferences that appear by site or mail type. For example, if you have system rights to view mail preferences for all sites, the grid may display hundreds of preferences. To view only preferences that apply to your site, click **Filter** on the action bar, select My site in the **Site** field, and click **Apply**.

From the grid, you can add and manage the communication preferences for the constituent. You can set preferences separately for each mail type. If a constituent has one preferred channel for all communications, you can also set one preference for all mail types.

## Assign Mail Preferences to a Constituent

From a constituent record, you can assign communication preferences to the constituent. Select the Communications tab and then click **Preferences**.

***Tip:*** While you can set preferences separately for each mail type, if a constituent has one preferred channel for all communications, you can also set one preference for all mail types. For information about how to set a preference for all mail types, see Set a Constituent Mail Preference for All Mail Types on page 207.

### Add a mail preference to a constituent

1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Mail preferences**, click **Add** on the action bar. The Add a mail preference screen appears.
3. In the **Mail type** field, select the type of communication to which the preference applies.
4. Select any additional criteria of the communication to which the preference applies, such as category.

***Note:*** You cannot add multiple preferences for the same mail criteria. However, you can add multiple preferences for the same mail type.

***Note:*** Depending on the selected mail type, select the site or business unit the preference applies. Administrators can set up security access to constituents based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this constituent preference as soon as you click **Save**.

5. Under **Preference**, select whether to send communications of the selected criteria to the constituent.

   If you select **Send**, select the preferred channel and address type to use and whether to exclude the constituent from a communication when the preferred channel is unavailable.

   - For a constituent household or group, select whether to send to the constituent or to a member of the group or household. If a member of the group or household is the contact for a mail preference, that constituent cannot be removed from the group.
   - For an individual constituent or a constituent household, if you select Mail, select whether to send to a seasonal address when applicable.
   - For an organization constituent, if you select Mail, select whether to send to the primary contact at the organization or the primary address of the organization itself.
6. In the **Comments** field, enter any notes about the preference as necessary.
7. Click **Save**. You return to the Preferences tab.

## Add a Mail Preference Screen

The table below explains the items on the Add a mail preference screen.

| Screen Item | Description |
|---|---|
| **Mail criteria** | Select the mail type and criteria to which the preference applies. |
| **Preference** | Select whether to send communications of the selected criteria to the constituent. |
| **Send to** | If you select **Send**, for a constituent group or household, select whether to send communications to the constituent group or household or to a member. If a member of the group or household is the contact for a mail preference, that constituent cannot be removed from the group. |
| **Send by** | If you select **Send**, select the preferred channel to use to communicate with the constituent, such as Mail or Email.<br>If you select Email, you can send only communications with an email output format to the constituent. |
| **Send to contact(s)** | If you select **Send**, for an organization, select which contacts at the organization receive communications. |
| **Selected address** | If you select **Send**, select the type of address to receive communications, such as Primary Address. |
| **Send to seasonal address when valid** | If you select to send by Mail, for an individual or a constituent household, select whether to send communications to a seasonal address when applicable. |
| **If Channel is unavailable, do not include in communication** | If you select **Send**, select whether to exclude the constituent from a communication when the preferred channel is unavailable.<br>If you do not select this checkbox, the constituent may receive communication through another channel when the preferred channel is unavailable. |
| **Comments** | Enter any additional information about the communication preference. |

## Edit Mail Preferences for a Constituent

From a constituent record, you can edit the constituent's communication preferences. Select the Communications tab and then click **Preferences**.

### Edit a mail preference for a constituent

1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Mail preferences**, select the preference to edit.
3. On the action bar, click **Edit**. The Edit mail preference screen appears. The items on this screen are the same as the Add a mail preference screen.
4. Edit the information as necessary.
5. Click **Save**. You return to the Preferences tab.

## Delete Mail Preferences from a Constituent

From a constituent's record, you can delete a mail preference from the constituent, such as if it no longer applies. Select the Communications tab and then select **Preferences**.

### Delete a mail preference from a constituent

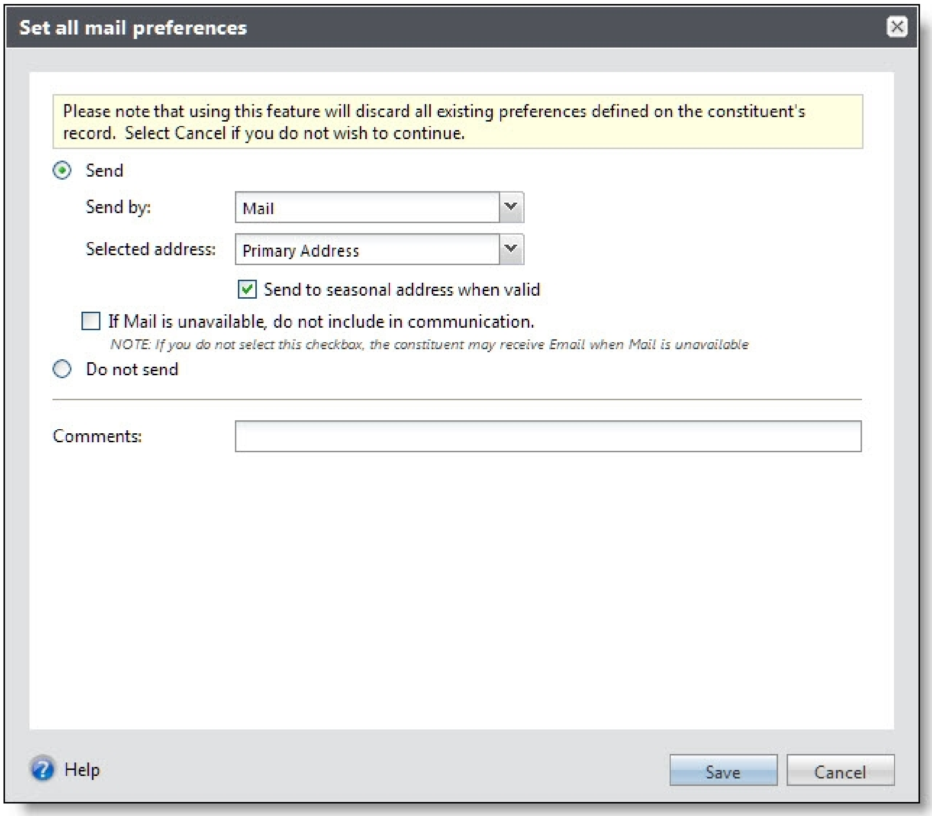
1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Mail preferences**, select the preference to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the preference.
4. Click **Yes**. You return to the Preferences tab.

## Set a Constituent Mail Preference for All Mail Types

Rather than set mail preferences separately for each mail type, you can set mail preferences for all mail types for a constituent. When you set a mail preference for all mail types, the program replaces all existing mail preferences with this preference.

### Set a mail preference for all mail types of a constituent

1. On the constituent's record, select the Communications tab. Then click **Preferences**.
2. Under **Mail preferences**, click **Set all mail types** on the action bar. The Set all mail preferences screen appears.




3. Select whether to send communications to the constituent.

   If you select **Send**, select the preferred channel and address type to use and whether to exclude the constituent from a communication when the preferred channel is unavailable.

   - For a constituent household or group, select whether to send to the constituent or to a member of the group or household. If a member of the group or household is the contact for a mail preference, that constituent cannot be removed from the group.
   - For an individual constituent or a constituent household, if you select Mail, select whether to send to a seasonal address when applicable.
   - For an organization constituent, if you select Mail, select whether to send to the primary contact at the organization or the primary address of the organization itself.

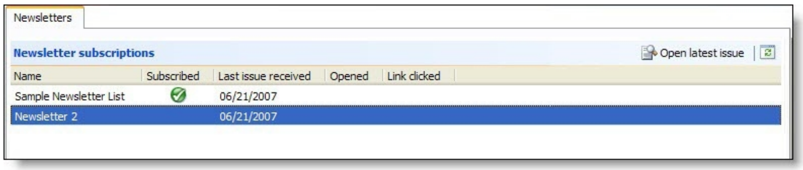
4. In the **Site** field, enter the site at your organization to which the preferences apply.

***Note:*** Administrators can set up security access to constituents based on site. Any security settings your administrators established for the site you specify in the **Site** field take effect for this constituent preference as soon as you click **Save**.

5. In the **Comments** field, enter any notes about the mail preference as necessary.
6. Click **Save**. You return to the Preferences tab.

# Newsletters Tab

To view newsletter information for the constituent, from the constituent record, select the Communications tab. Then click **Newsletters**.




In the **Newsletter subscriptions** grid, you can view information about the newsletters your organization sends to the constituent. The **Name** column lists the names of the newsletters sent to the constituent. For each newsletter in the grid, you can view summary information, including whether the constituent subscribes to the newsletter; the date of the last issue received; and whether the constituent opened the newsletter or clicked a link in it. To update the grid, click **Refresh list**.

Depending on your system role and security rights, you can also view the report on the website for each newsletter in the **Newsletter subscriptions** grid. To view the report, select it in the grid and click **Open latest issue**. The website opens to the report for the selected newsletter.

***Note:*** To view a report, you must log in to ***Blackbaud Internet Solutions***.

# Accounts

To view bank or financial institution account information about a constituent, from the Revenue tab select the Accounts tab.

Under **Financial accounts**, you can view the accounts associated with the constituent. For each account, you can view its financial institution, routing and account numbers, account type, and electronic funds transfer (EFT) status.

***Note:*** Depending on the banking systems enabled for your organization, additional columns that represent banking system and routing number information may display on this tab. You can enable or disable banking systems for your organization from the **Banking systems** link in *Treasury*.

To ease monetary transactions between your organization and the constituent, you can add and manage these accounts from the grid. For example, a constituent may have an account with a particular bank and ask you to automatically withdraw funds each month to apply toward a recurring gift.

***Note:*** You set up your organization’s bank accounts from the Manage Bank Accounts page in *Treasury*. After you set up a bank account, you can select a specific bank account to process your organization’s financial transactions, such as transactions included in a direct debit transmission file. For information about how to manage bank accounts, see the *Treasury Guide*.

If a constituent has a bank account with "Europe (SEPA)" as the banking system,

In order to process direct debit payments in euros from a constituent with a bank account which uses the "Europe (SEPA)" banking system, your organization must have a signed SEPA mandate on file from the constituent which authorizes you to draw funds from the constituent's account. When you enter revenue for the constituent using the direct debit account, you must select an existing mandate or add a new one. Mandates are displayed by bank account on the Accounts tab of the constituent record. You can edit these mandates, such as to enter a **Signature date** or change the **Mandate status**, if needed.

# Add Financial Accounts for a Constituent

You can add the financial accounts a constituent uses to support your organization, such as to use direct debit to withdraw payments for a recurring gift.

### Add a financial account

1. Open the record of the constituent with the financial account to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Revenue tab, select the Accounts tab.
3. Under **Financial accounts**, click **Add** on the action bar. The Add financial account screen appears. For information about the items on this screen, see Add Financial Account Screen on page 210.
4. Enter a unique name to help identify the account, such as in acknowledgement letters.
5. In the **Financial institution** field, click the search button. The Financial Institution Search screen appears so you can find and select the financial institution to associate with the constituent.

   If the search results do not return the applicable institution, you can add it from the search screen. For information about how to add a financial institution, see Add Constituent Financial Institutions on page 28.
6. In the **Account number** field, enter the identification number for the account.

***Note:*** The **Account number** field may display differently depending on the default banking system associated with the financial institution you select. For example, if **Europe (SEPA)** is associated with the financial institution you select on this screen, the **Account number (IBAN)** field appears.

7. In the **Account type** field, select the type of account, such as Savings.
8. In the **EFT status** field, select the electronic funds transfer (EFT) status of the account. For example, for an account outside of the United States, select Inactive. For an account in the United States, to include the financial account in the next prenotification process, select Prenotify.
9. Click **Save**. You return to the Accounts tab.

# Add Financial Account Screen

The table below explains the items on the Add financial account screen. For information about how to access this screen, see Add Financial Accounts for a Constituent on page 210.

| Screen Item | Description |
|---|---|
| **Name on account** | Enter a unique name to identify the constituent's account, such as in acknowledgements. |
| **Financial institution** | Click the search button and use the Financial Institution Search screen to select the branch of the financial institution associated with the constituent. You can also search by banking system as well as routing number, sort code, BIC, or bank code information. The fields on the Search screen display differently depending on your enabled banking systems.<br><br>Before you can select a financial institution, it must exist in your database. We recommend you add financial institutions with the **Financial Institutions** configuration task. If the search results do not return the institution or branch you want, you can also add the institution from the Financial Institution Search screen. For information about how to add an institution, see Add Constituent Financial Institutions on page 28. |
| **Branch** | This field displays the branch name entered for the selected financial institution. |
| **Routing number, Sort code, BIC, or Bank code** | This field displays the routing number, sort code, BIC, or bank code entered for the selected financial institution. In most cases, the financial institution provides the number or code to use. |
| **Account number** | Enter the constituent's account number, formatted as you want it to appear throughout the program.<br><br>This field may display differently depending on the default banking system associated with the financial institution. For example, if **Europe (SEPA)** is associated with the financial institution you select on this screen, the **Account number (IBAN)** field appears. |
| **Account type** | Select the type of account the constituent has with the financial institution, such as Savings. |
| **EFT status** | For an account in the United States, select the electronic funds transfer (EFT) status of the account. EFT is a general banking system by which your organization automatically withdraws revenue from the constituent's bank account, such as for recurring gift payments. When you first add a financial account, select Prenotify to include the account when your organization next runs a prenotification process.<br><br>For an account outside of the United States, select Inactive. |

# Edit a Financial Account for a Constituent

After you add a financial account for a constituent, you can edit its information as necessary.

### Edit a financial account

1. Open the record of the constituent with the financial account to edit. For information about how to open a constituent record, see Constituent Search on page 61.

2. From the Revenue tab, select the Accounts tab.
3. Under **Financial accounts**, select the account to edit.
4. On the action bar, click **Edit**. The Edit financial account screen appears. The items on this screen are the same as the Add financial account screen. For information about the items on this screen, see Add Financial Account Screen on page 210.
5. Edit the information as necessary.
6. Click **Save**. You return to the Accounts tab.

## Delete a Financial Account for a Constituent

After you add a financial account for a constituent, you can delete it as necessary.

### Delete a financial account

1. Open the record of the constituent with the financial account to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. From the Revenue tab, select the Accounts tab.
3. Under **Financial accounts**, select the account to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the account.
5. Click **Yes**. You return to the Accounts tab.

# Constituent Attributes

You can use attributes to store specialized information about constituents when no field or tab exists for that information. Attributes help track constituent information that best meets your organization's needs. For example, you can use attributes to record hobbies, dietary preferences, special requests, or advocacy activities. To view a constituent's attributes, select the Attributes tab.

Under **Attributes**, you can view attributes assigned to the constituent. For each attribute, you can view its value, group, valid date range, and any comments about the constituent attribute. You can also manage the constituent's attributes.

***Note:*** Your organization sets up constituent attributes in *Administration*. For information about how to create and manage attribute categories, see the *Administration Guide*.

## Add Attributes to a Constituent

From the Attributes tab of a constituent record, you can assign attributes to record special information about the constituent. You can add an unlimited number of attributes to the constituent. If necessary, you can assign the same attribute multiple times to the constituent to build a comprehensive constituent record.

### Add a constituent attribute

1. Open the record of the constituent with the attribute to add. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Attributes tab.
3. Under **Attributes**, click **Add** on the action bar. The Add constituent attribute screen appears. For information about the items on this screen, see Add Constituent Attribute Screen on page 213.
4. In the **Category** field, select the type of attribute to assign to the constituent. Your organization sets up constituent attribute categories in *Administration*.
5. Enter or select the value of the attribute category to assign to the constituent.
6. If the attribute applies to the constituent for a finite duration, select the start and end dates of the constituent attribute.
7. In the **Comments** field, enter any additional information to record about the constituent attribute.
8. Click **Save**. You return to the Attributes tab.

# Add Constituent Attribute Screen

| Screen Item | Description |
|---|---|
| **Category** | Select the type of attribute to assign to the constituent, such as Office hours, Dietary preference, or Responsibilities.<br>When you edit a constituent attribute, you cannot edit this field.<br>Your organization defines attribute categories in *Administration*. For information about how to manage attribute categories, see the *Administration Guide*. |
| **Value** | Enter or select a value for the attribute category. For example, for a category of Dietary preference, enter “Vegetarian” or “Lactose intolerant”.<br>Your organization defines attribute categories and their values in *Administration*. Depending on the configuration, this field may provide a drop-down menu; accept free-form text, a number, or date; and so on. For information about how to manage attribute categories and values, see the *Administration Guide*. |
| **Start date** and **End date** | If the attribute or attribute value applies to the constituent for a finite duration, enter the start and end dates of the duration. |
| **Comment** | Enter any additional information to record about the value. |

# Edit a Constituent Attribute

After you add an attribute to a constituent, you can edit it as necessary. When you edit a constituent attribute, you cannot edit the attribute category.

### Edit a constituent attribute

1. Open the record of the constituent with the attribute to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Attributes tab.
3. Under **Attributes**, select the attribute to edit.
4. On the action bar, click **Edit**. The Edit constituent attribute screen appears. The items on this screen are the same as the Add constituent attribute screen. For information about the items on this screen, see Add Constituent Attribute Screen on page 213.
5. Edit the information as necessary.
6. Click **Save**. You return to the Attributes tab.

# Delete a Constituent Attribute

After you add an attribute to a constituent, you can delete it as necessary.

### Delete a constituent attribute

1. Open the record of the constituent with the attribute to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Attributes tab.
3. Under **Attributes**, select the attribute to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the attribute.
5. Click **Save**. You return to the Attributes tab.

# Smart Fields

Smart fields help provide application users quick access to specific information that otherwise would require time and the configuration of queries and reports to view. For example, your system administrator may create a smart field to display the total giving of a constituent. To display information about a constituent generated from a smart field created in *Administration*, select the Smart Fields tab.

Under **Smart Fields**, you can view the names of the smart fields and the value and value group of each. To ensure the information in the grid is current, click **Refresh List** on the action bar.

For information about how to create and manage smart fields, see the *Administration Guide*.

# Constituent Security

To view information about the security groups and sites to which the constituent belongs, select the Security tab.

Security groups enable you to divide constituents into partitions. You can then establish different roles and apply a different security group to each role. Feature permission settings in a role apply only to records included within the specific security group. For example, you may grant two roles rights to the same constituent features, such as the ability to add and edit constituent addresses, but users in one role can access only constituents in the School of Law group, while users in the other role can access only constituents in the School of Medicine group. Under **Security groups**, you can view and manage the security groups that include the constituent.

***Tip:*** Your organization sets up security groups in *Administration*. In *Administration*, you can also configure a business process to automatically apply or remove the assignment of a security group to constituents.

Site security allows you to restrict access to a constituent record to the users associated with assigned sites. Under **Sites**, you can view the sites assigned to the constituent. To edit the sites, click **Edit**. The Edit constituent sites screen appears.

For more information about security, see the *Security Guide*.

## Assign Security Groups to a Constituent

From the Security tab of a constituent record, a system administrator can assign a security group to the constituent. You can associate security groups with system roles to partition constituents so different roles can access different constituents.

As soon as you assign a security group to a constituent, that constituent becomes unavailable to users without rights to records associated with the group. However, users currently logged in when you make the change can still access the constituent record within the duration of the cache specified in the program's Web.config file. When the cache duration passes or the user logs out and back in, logged in users can no longer access the record.

### Assign a security group

1. Open the record of the constituent to assign a security group. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Security tab.
3. Under **Security groups**, click **Assign security group** on the action bar. The Assign security group screen appears.
4. Select the security group to assign to the constituent. You set up security groups in *Administration*.
5. Click **Save**. You return to the Security tab. Users who have rights to records associated with the group can access the constituent record.

# Remove a Security Group from a Constituent

From the Security tab of a constituent record, you can remove a security group assigned to the constituent.

### Remove a security group

1. Open the record of the constituent with the security group to remove. For information about how to open a constituent record, see Constituent Search on page 61.
2. Select the Security tab.
3. Under **Security groups**, select the group to remove.
4. On the action bar, click **Remove security group**. A message appears to ask whether to remove the group.
5. Click **Yes**. You return to the Security tab. Users who have rights to records associated with the removed group can no longer access the constituent record.

# View a Security Group Record

After you assign a security group to a constituent, you can access the record of the group from the Security tab of the constituent record. On the security group record, you can manage its system roles and configure the constituent security settings.

To access the security group record from the Security tab of the constituent record, click the name of the group under **Security groups**.

For more information about Security, see the *Security Guide*.

# Tributes

A constituent tribute is a form of recognition. With tributes, you can indicate that your organization should recognize a donation in relation, or tribute, of someone other than the donor. Examples of tributes include “In memory of”, “In honor of”, or “On behalf of”. To view all tributes made by the constituent and all tributes for which the constituent is the acknowledgee, from the Revenue tab select the Tributes tab.

Under **Tributes**, you can view the text, type, and date of each tribute associated with the constituent. You can also view whether each tribute is active and whether the constituent is the tributee or the acknowledgee. To ensure the information in the grid is current, click **Refresh** on the action bar.

To view detailed information about the tribute, such as its acknowledgees and revenue received, click its name under **Tributes**. The record of the tribute appears. For information about the items on this record, see Tribute Record on page 305.

From the grid, you can add and edit tributes associated with the constituent. For information about how to manage tributes, see Tribute Information on page 300.

# Organization History

To view and manage parent and corporate merger history information about an organization constituent, select the **History** tab.

Under **Parent history**, information about the organization constituent's parent organization appears. From this grid, you can view the past and current parent organizations, go to the parent organization's constituent record, and edit or delete parent history information. You select the parent organization on the Organization tab. For information about how to select the parent organization, see Organization Information on page 120.

***Warning:*** If you delete a current parent organization history from the **History** tab, the program does not delete it from the Organization tab.

Under **Merger history**, information about an organization's corporate merger history appears. From this grid, you can open any organization constituent record involved in the merger.

For information about mergers, see Corporate Mergers on page 253.

## Parent History Information

On the Organization History tab, you can review the parent history information about the organization constituent. To open the parent organization's constituent record, select the parent organization in the grid and click **Go to organization**. To edit the start and end date for the parent relationship with the organization, select the parent and click **Edit**. The Edit parent history screen appears so you can edit the dates.

Although not recommended, you can delete a parent history from the organization. Select the parent organization history to delete and click **Delete**. When a confirmation screen appears, click **Yes**. You return to the organization constituent record.

For information about how to assign a parent organization, see Edit Details for an Organization Constituent on page 121.

## Corporate Merger History

On the Organization History tab, you can review the corporate merger history for the organization constituent. To go to either source organizations for the merger, under **Merger history**, select the merger and on the action bar, click **Go to** and select which of the organizations to view. In your database, source organizations are inactive.

# Constituent History

From the constituent record, you can view an audit of the changes made to the record. From a constituent, click the **History** tab.

Under **History**, you can view the changes and revisions made to the constituent record. For each change, you can view the date and time of the change, the action performed, the field affected, the field values before and after the action, and the user or process that performed the change. In the **Application** column, you can also view the application from which the change was made. For changes made through regular use of the program, “Blackbaud App Server” appears. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

To help find a specific change, you can filter the history information that appears. On the action bar, select the criteria of the information to view, and click **Apply**. You can select to view historical information by a specific user and of a specific action. In the **Show** field, you can select to view changes made during a specific time frame, such as Last 30 days, Last 6 months, or Last year. If you select “Specific date range”, enter the time period in the **Start date** and **End date** fields. To remove the selected filters and display all history information, click **Reset** on the action bar.

You can also go to the **Origin** tab to see information about where this constituent record came from—whether it was through a direct marketing acquisition list or from a volunteer fair, for example. For more information, see Constituent Origin on page 218.

## Constituent Origin

Constituent origin information tracks the source for the constituent record. If a constituent comes to your organization to be a volunteer, you might assign the constituent a source of Volunteer. If a constituent is added at the same time revenue is added (a new constituent gives a donation, for example) or if a constituent has no source information and revenue is added (an existing constituent with no revenue history gives a donation, for example), a default constituent source code may be assigned which is tied to the revenue.

To view or edit constituent origin information from a constituent, click **History** under **More information**. On the Origin tab, click **Edit**. You can edit or select a constituent source. The date the record was added is not editable.

Origination information is also available in *Query* so you can analyze your data and measure how effective your constituent sources are.

# Wealth and Ratings

Wealth information is data used to track your constituent’s estimated wealth. Knowing the types and amount of wealth your constituents possess allows you to better determine cultivation strategies and determine the constituent’s giving potential.

From a prospect’s Wealth and Ratings screen, you can enter a variety of wealth-related information, such as real estate, stock, pension, and salary. If you subscribe to ***WealthPoint***, the wealth screening solution from Target Analytics, you can also import all ***WealthPoint*** data obtained by Target Analytics.

> ***Tip:*** The **WealthPoint** service helps you identify your best major and planned gift constituents, attract and retain wealthy donors, maximize gifts, determine the wealth potential of your entire database, set reasonable campaign goals, and free up staff resources for person-to-person fundraising.

For organizations, groups, and households wealth information is arranged in the **Wealth summary** grid of the prospect's Wealth and Ratings screen.

For individual prospects wealth information is arranged in a series of tabs that categorize the data collected.

- Affiliations tab: Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.
- Assets tab: Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.
- Biographical Information tab: Houses biographical data collected from the Who's Who database.
- Giving tab: Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.
- Model Scores tab: Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which constituent will become a major donor.
- Wealth Summary tab: Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.

# Online Information

After you download and commit a sign-up request or user profile update for a constituent from your website, an **Online Info** tab appears on the constituent record. To view the constituent's online activity, click the tab.

***Note:*** To apply a constituency for a constituent who is also a member of your site, first define the constituency, such as Community member or Online user, in *Constituents* under **Configuration**. Then, select the constituency in the **Constituency** field on the User Login part in ***Blackbaud Internet Solutions***. For information about the User Login part, see the *Website Design Guide*.

The **Online Info Summary** subtab includes the constituent's user name on your website, the date the constituent registered on your website, and the date and time the constituent last logged in to the website.

In addition, the **Web Traffic** tab tracks more online activity for the constituent on your website.

Under **Top five pages visited**, you can view the web pages that a constituent visits most often while logged in. In the **View** field, you select whether to view pages for this week, last week, this month, last month, this year, last year, or the entire time the constituent has been registered on your site. The grid displays the number of visits to each page. To open a page in a web browser, click its name in the grid.

Under **Last pages visited**, you can view the most recent pages the constituent visited while logged in. In the **View** field, you select whether to display five, 10, or 25 pages. The grid displays the date of the most recent visit for each page. To open a page in a web browser, click its name in the grid.

Under **Visit summary**, bar graph displays how frequently the constituent logs in to your website during a selected interval. In the **View visits per** field, you select the time interval to view.

# Employment History

You can track the employment history for constituents which includes job title, job category, and career level information. For organization constituents, it offers a view of all employees, past and present. For individual constituents, it offers a work history. You can use the employment history information as an added dimension in cultivation and solicitation. For example, you might hold a special networking event for individuals with jobs in similar categories.

Items are added to the employment automatically when an individual and organization constituent have a relationship which includes any employment information (job title, job category, or career level). When you create an organization relationship for an individual, for example, if you include a job title, the item is automatically added to the employment history. You can also manually add items to the employment history. For organization constituents, you can add new job information for individuals who already have a relationship with the organization. For individual constituents, you can add current or previous jobs with organizations the individual already has a relationship with.

***Note:*** The easiest way to add employment history items for individuals and organization with no established relationship is to add those relationships on the Relationships tab and include the employment information. For past jobs and employees, you can use the start and end dates on the relationship. Those relationships will automatically appear in the employment history. For more information, see Add Individual Relationships for an Organization Constituent on page 133 and Add Organization Relationships for an Individual Constituent on page 140.

When you view the employment history, you can exclude inactive items. Employment information with an end date prior to the current date is considered inactive.

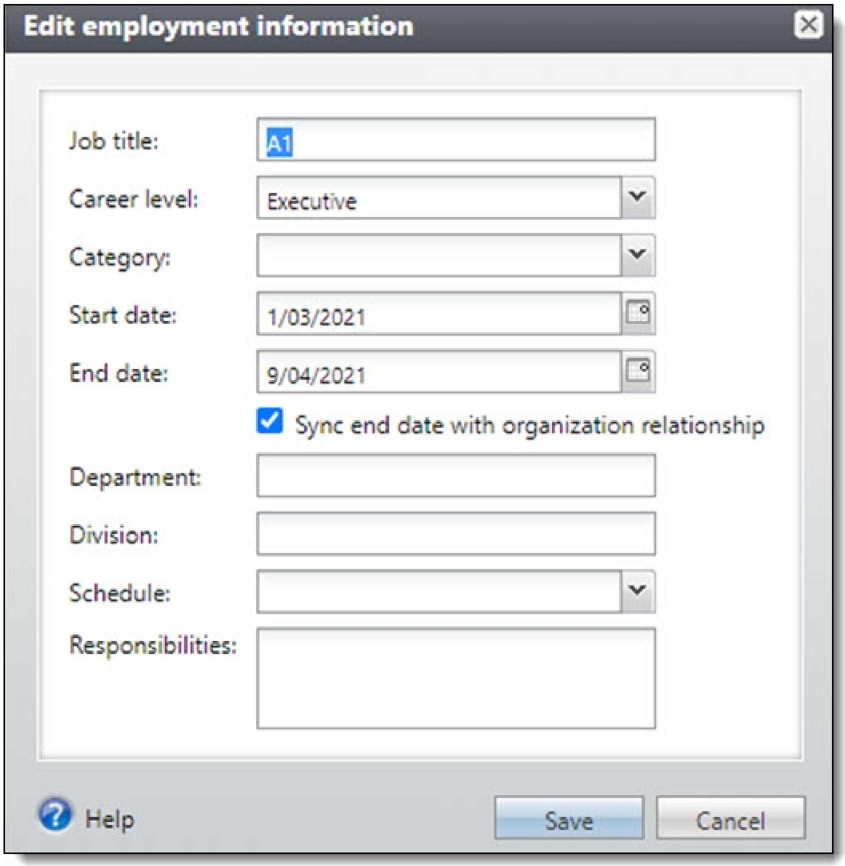
## Add Employment History

You can add employment information from the Relationships tab of an individual or an organization. For organization constituents, you can add new job information for individuals who already have a relationship with the organization. For individual constituents, you can add current or previous jobs with organizations the individual already has a relationship with.

***Note:*** For individuals and organization with no established relationship, you can add the relationship on the Relationships tab and include the employment information. Those relationships will automatically appear in the employment history. For more information, see Add Individual Relationships for an Organization Constituent on page 133 and Add Organization Relationships for an Individual Constituent on page 140.

### Add employment information to an individual (with an existing organization relationship)

1. From *Constituents*, open an individual record. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Relationships tab, make sure a relationship with the organization already exists.
3. Under **Employment History**, click **Add**. The Add employment information screen appears.




4. In the **Relationship** field, select the organization relationship.

***Tip:*** If no organization relationships exists, or the one you want is not available, add the organization relationship from the Relationships tab and include the employment information.

5. Enter information about the employment, such as job title or category, career level, schedule, department, division, responsibilities, and start and end dates.
6. Select **Sync end date with organization relationship** to automatically synchronize end dates when you add or edit an end date on a relationship or employment history for the constituent.

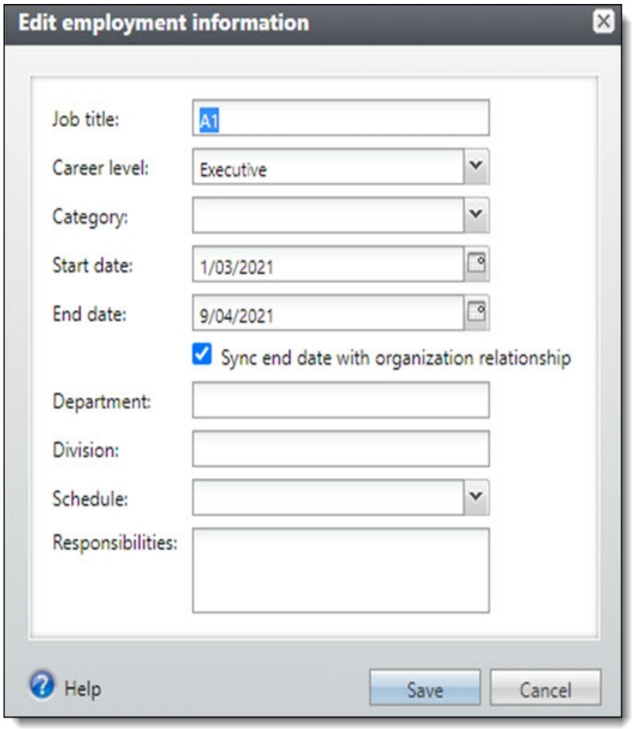
***Note:*** The dates only synchronize with the latest employment information. Historical employment information is not synchronized.

7. To hide the employment relationship on your Blackbaud Internet Solutions website, select **Is private**.
8. Click **Save**. You return to the Employment history page.

## Add employment information to an organization (with an existing individual relationship)

1. From *Constituents*, open an organization record. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Relationships tab, ensure a relationship with the individual already exists.

3. Under **Employment History**, click **Add**. The Add employment information screen appears.




4. In the **Relationship** field, select the individual relationship.

***Tip:*** If no individual relationships exists, or the one you want is not available, you can add the individual relationship from the Relationships tab and include the employment information.

5. Enter information about the employment, such as job title or category, career level, schedule, department, division, responsibilities, and start and end dates.
6. To hide the employment relationship on your Blackbaud Internet Solutions website, select **Is private**.
7. Click **Save**. You return to the Employment history page.

# Edit Employment History

You can edit employment information from the Relationships tab of an individual or an organization. If an employee was promoted or changed jobs at the organization, you should edit the employment information to add an end date to old job or title and add a new employment history item for the new job or title, which gives you a more complete view of the constituent's employment history over time.

## Edit employment information

1. From *Constituents*, open a constituent record. For information about how to open a constituent record, see Constituent Search on page 61.

2. On the Relationships tab of an organization or individual constituent, under **Employment history**, select an employment information item and click **Edit**. The Edit employment information screen appears.
3. Edit the job title or category, career level, schedule, department, division, responsibilities, and start and end dates. To hide the employment relationship on your Blackbaud Internet Solutions website, select **Is private**.
4. Click **Save**. You return to the Employment history page.

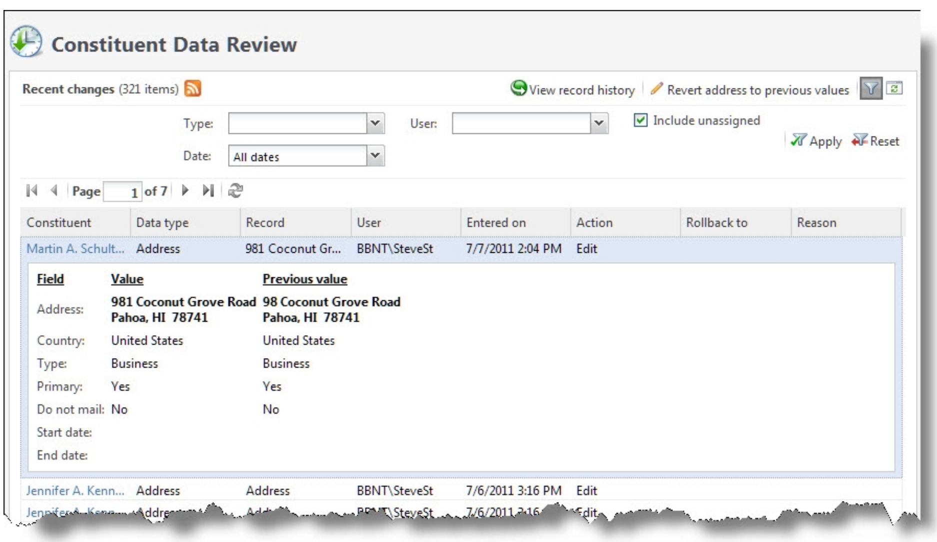
## Delete Employment History

If necessary, you can delete the relationship from the Relationships tab of the constituent. However, if an employee was promoted or changed jobs, rather than deleting the old item, you should edit the employment information to add an end date to old job or title, which makes that item inactive. You can then add a new employment history item for the new job or title. This gives you a more complete view of the constituent's employment history over time.

To delete an item from the employment history, on the Relationship tab select the item from the Employment history list and click **Delete**. When you delete an item from the employment history, the relationship with that organization or individual is not also removed from the Relationships tab.

# Constituent Data Review

On the Constituent Data Review page, you can view an audit of the changes made to the contact information of constituents in your database. To access the Constituent Data Review page, from *Constituents*, click **Constituent data review**.




***Note:*** On the Constituencies tab of a constituent record, you can assign fundraisers to maintain your organization's relationship with the constituent. For information about how to assign a relationship manager to a constituent, see Add Constituent Relationship Managers on page 116.

If your organization assigns relationship managers to constituents, the **Recent changes** grid displays the changes made to the constituents to which you are assigned as the relationship manager. To also view the changes made to constituents not assigned to relationship managers, select **Include unassigned** on the action bar and click **Apply**. In the grid, you can view the name of the constituent associated with the change, the type of contact information changed, the user who made the change, and the date of the change. You can also view whether the change was the addition of new contact information or the edit of existing information. To make sure the grid displays the latest information, click **Refresh List** on the action bar.

To help find a specific change, you can filter the information that appears. On the action bar, select the criteria of the changes to view, and click **Apply**. You can select to changes of a specific type of contact information, the user who made the change, or the date range of the change. To remove the selected filters and display all change information, click **Reset** on the action bar.

To view additional information about a change, select its row under **Recent changes**. Beneath the row, contact information for the constituent, before and after the change, appear. To view additional information about the constituent associated with a change, such as to correct an edit, ciick the constituent's name under **Recent changes**. The constituent record appears.

# View Constituent Record History

To view the selected record’s entire change history from the Constituent Data Review page, select the change under **Recent changes** and click **View record history**. The view changes from **Recent changes** to **Record history**. To return to **Recent changes**, click **Return to recent changes**. What appears in the **Recent changes** view is determined by the **Date** filter.

# Rollback a Constituent Data Change

From the Constituent Data Review page, you can undo any change listed under **Recent changes** or **Record history**.

### Rollback a selected constituent data change

1. From the Constituent Data Review page, under **Recent changes** or **Record history**, select the change entry to roll back to its original state.

   The action bar displays a rollback action based on the selected change. For example, for a change to a constituent address, **Revert address to previous values** appears; for the addition of a new email address, **Delete email address** appears.
2. Click the rollback action. The appropriate screen appears.
3. In the **Reason**field, select the reason code that explains the rollback.

> ***Note:*** To configure reason codes for constituent rollbacks from *Constituents*, click **Reason codes** under **Configuration**.

4. Click **Save**. You return to the Constituent Data Review page.

> ***Warning:*** When you edit a rollback, you do not roll back only that particular change; you roll back to a specific point in time. This means you also undo any other changes made to the record between the time of the original change and the rollback.

> ***Note:*** To restore a rolled back change, select the change in the grid and select the appropriate button. For example, if you mistakenly delete a new email address, to restore the change, select the deleted email change in the grid and click **Re-add deleted email address**; to restore a mistakenly rolled back address change, select the rolled back address in the grid and click **Revert address to previous values**.

## Delete Address/Phone number/Email Address Screen

In the **Reason** field, enter a reason code to explain the reversion.

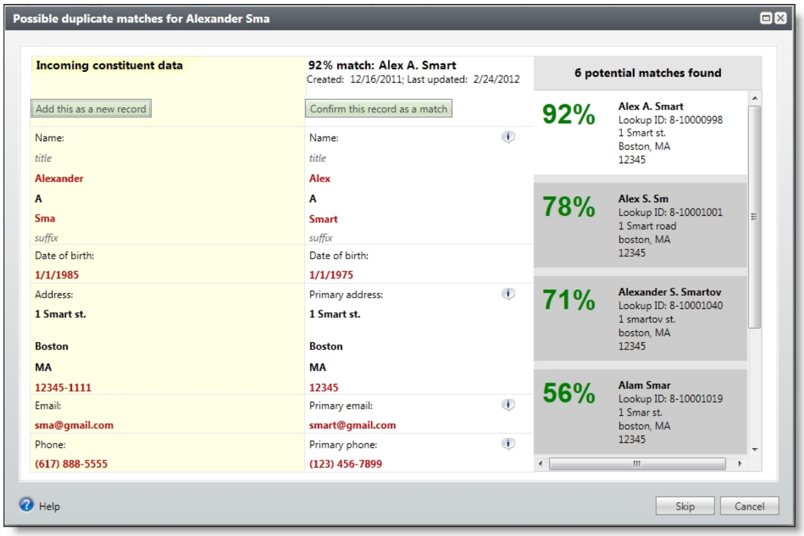
> ***Note:*** To configure reason codes for constituent rollbacks from *Constituents*, click **Reason codes** under **Configuration**.

# Duplicate Constituents

When you add a new individual or organization constituent, the program automatically compares it to existing records to verify that it does not already exist in the database. If the program finds other constituents with similar name and address information, the Possible duplicate matches screen appears and displays all possible matching records. From this screen you can decide whether to create a new constituent or to update an existing record with new information.

### Resolve duplicate constituents from the Add an Individual or Add an Organization screen

1. From the Add an Individual or Add an Organization screen, enter information for a new constituent. When you click **Save**, the program automatically runs a duplicate check to find any existing constituents that may match this new constituent. If it finds a match, the program flags automatically displays the Possible duplicate matches screen so you can decide whether to create a new constituent or to update the existing constituent with new information.

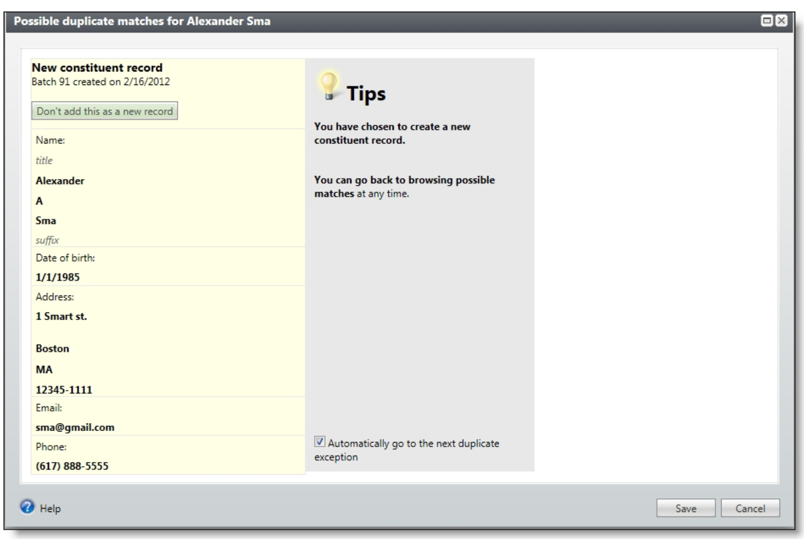



The **Incoming constituent data** column displays information from the new record.

The **Potential Matches** column on the right lists all existing constituents in the database that are possible matches, ranked from the highest to lowest match confidence score. The percentage represents the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about the match confidence score, see the *Administration Guide*.

When you select a constituent in the **Potential matches** column, its information appears in the middle column so you can compare the incoming and existing records side-by-side. Black fields are exact matches. Red fields are similar but need careful review. After you compare the records, you can do one of the following:

- If you decide the incoming constituent is not a duplicate, click **Add this as a new record**. The screen displays the name and contact information for the new record. Click **Save** to create a new record, or if you change your mind, you can click **Don't add this as a new record** to return to the previous screen.



- If you decide the incoming constituent does match an existing constituent, click **Confirm this record as a match**. Additional options appear. You can evaluate each red field and decide what to do with the incoming data: If you select to add or update a field, it appears green in the existing constituent column. If you select to ignore a field, it appears stricken through in the incoming constituent column.

a. To discard all new or conflicting data from the incoming constituent, click **Ignore all**.

b. To automatically apply the constituent update rules set on the Global data entry page of *Administration*, click **Use my organization's rules**. For example, if you have **Add incoming phone number as new phone number** set as a rule, when you click **Use my organ**iz**ations rules**, the program automatically adds the incoming phone number to the existing record. If your update rules require manual review for certain fields, you must review those incoming fields and manually select which action to take. As a reference, your organization's selected update rules appear in the **Tips** column. For information about constituent update rules, see the *Administration Guide*.

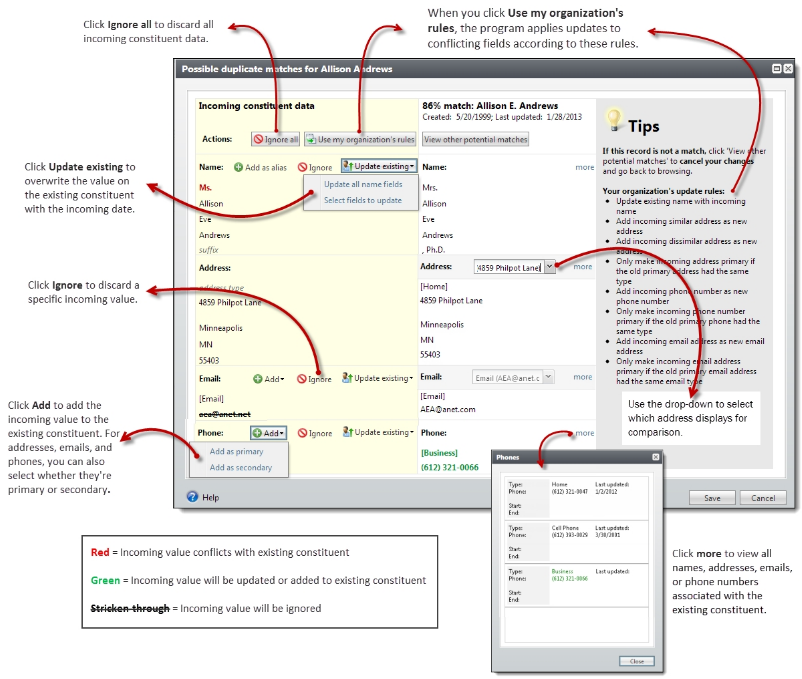
c. To add the name as an alias to the existing constituent, click **Add as alias**. To add the address, email, or phone number as primary or secondary on the existing constituent (rather than replace the existing value), click **Add** and select **Add as primary** or **Add as secondary**. If the incoming constituent has information that is blank on the existing constituent, you can click **Add** to add that data to the existing record.

***Note:*** If the existing constituent has multiple addresses, phone numbers, or emails, use the drop-down to select which one to display.

***Note:*** Click **more** to view the history of changes for each field on the address, phone number, or email.

d. To discard the incoming value (neither add a new value nor update the existing value), click **Ignore**.

e. To replace the existing name, address, email, or phone number with the incoming value, click **Update existing** and select whether to update all fields or to select individual fields to update. If you select **Update all name/address/email/phone number fields**, the program moves all fields of that type to the existing constituent. If you select **Select fields to update**, the **Ignore** and **Update current** options appear so you can handle each field individually.




2. Click **Save** to save your changes to the existing record, or if you change your mind, you can click **View other potential matches** to return to the previous screen.

# Prospect Management

For information about prospects and prospect management, see the *Prospects Guide*.

# Fundraiser Management

For information about fundraisers and prospect management, see the *Prospects Guide*.

# Individual Constituents



Individual constituent records maintain information about the people in your database, such as the donors and solicitors associated with your organization. When you add an individual constituent, you can also track relationships the constituents have with other people and organizations in your database.

## Add Individual Constituents

When you add an individual constituent record, you enter personal and primary contact and business information for the individual.

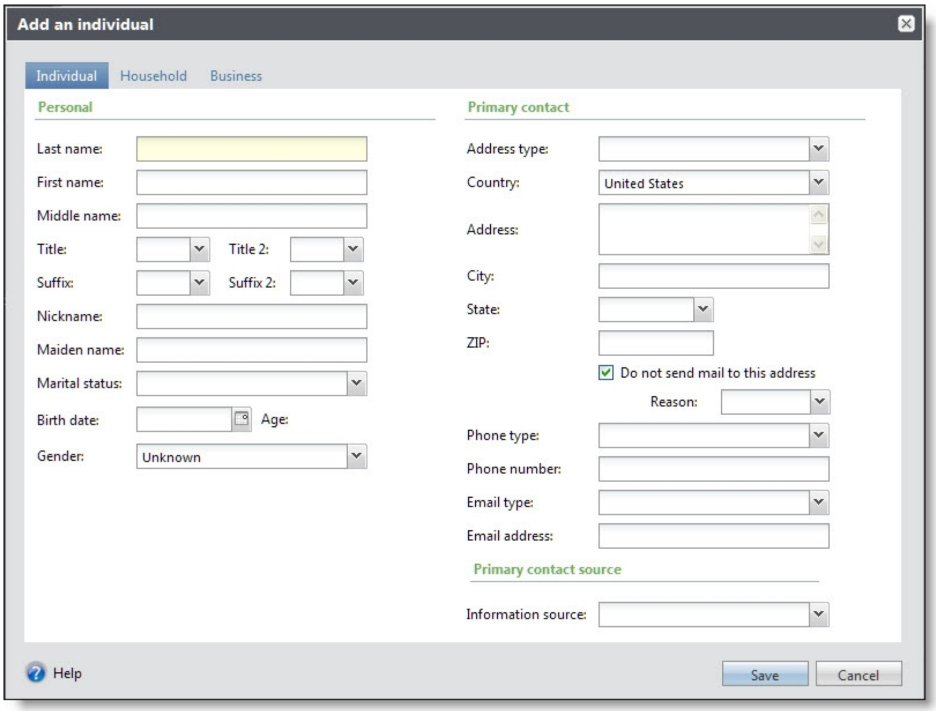
You can also add a spouse or partner relationship for the individual and create a household for the couple.

***Tip:*** For information about bulk updates through a batch, see Add or Update Multiple Constituents through Batch Entry on page 234.

## Add an individual constituent

To avoid duplicate constituents, we recommend you first search your database for the constituent before you add a new individual.

1. From *Constituents*, click **Add an individual**. The Add an individual screen appears.




2. Select the Individual tab.
3. Under **Personal**, enter the name of the constituent as it should appear throughout the database, including any title or suffix.
4. In the **Marital status** field, select whether the individual is married, single, or divorced.
5. In the **Birth date** field, enter the individual’s date of birth. If you are unsure of the exact birth date, enter a “fuzzy” date such as 10/1941. If the date contains a year, the constituent’s age is calculated and displayed.
6. In the **Gender** field, select whether the individual is a male or female. If you are unsure of the constituent’s gender, select “Unknown”.
7. Under **Primary contact**, select the type of address to use as the primary address for the individual, such as Home or Business, and enter the address information.

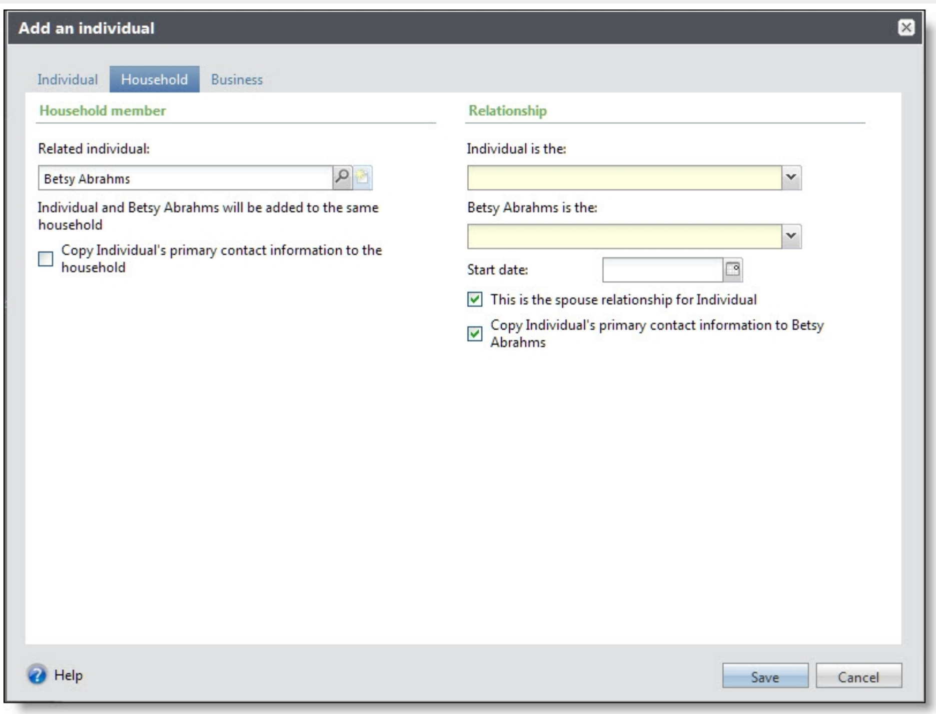
   If the constituent requests that you not send mail to the address, select **Do not send mail to this address**. In the **Reason** field, select why the constituent does not want to receive mail at the address.
8. With *Data Tune-Up*, you can use an address validation service to verify the address entered exists. When you use the address validation service, the program updates missing or incomplete information such as the Zip code, standardizes the street address, and updates the Coding Accuracy Support System (CASS) certified information.

To not include the address entered when your organization runs the address validation process, select **Omit from validation**.

To run the address validation process for the address now, click **Validate**. The program updates the address fields accordingly. If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**.

9. In the **Phone type** field, select the type of phone number to use as the primary number for the individual, such as Home or Cell Phone. In the **Phone number** field, enter the phone number to use to contact the constituent.
10. In the **Email type** field, select the type of email address to use as the primary email address for the individual. In the **Email address** field, enter the email address to use to contact the constituent.
11. Under **Primary contact source**, select the information source for the contact information, such as "Family member." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.
12. To add information about a household member for the individual, select the Household tab.

***Tip:*** Households group multiple constituents who live together at the same address. On the Household tab, you can enter information about the individual's spouse, partner, or other household member. When you add a new individual, you can add only one household member. On the constituent record, you can add additional household members on the Household tab.




***Note:*** If you know the individual is not already a constituent, click **Add** in the **Related individual** field to add the constituent.

a. In the **Related individual** field, search for the individual to add as a spouse or household member. If the individual is not already a constituent in the database, you can click **Add** on the Constituent Search screen.

b. When you save the new individual constituent, the program automatically generates or updates a record of the constituent household with the individual. To copy the primary contact information of the individual constituent to the record of the household member, select **Copy individual's primary contact information to the household**.

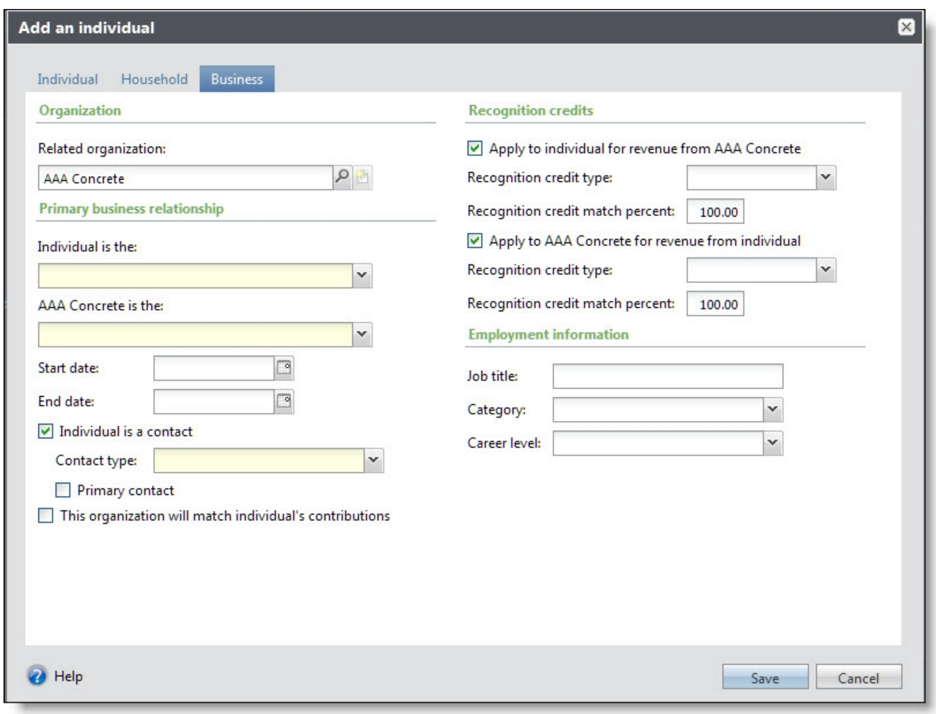
c. Under **Relationship**, select the relationships the individual constituent and the household member have with each other, such as Husband and Wife.

d. In the **Start date** field, enter the date the relationship started, or enter the date you enter the relationship to your database.

e. If the household member is the spouse or partner of the individual constituent, select **This is the spouse relationship**.

f. To copy the primary contact information of the individual constituent to the spouse or household member's record, select Copy individual's primary contact information to spouse.

13. To add information about a relationship the individual has with an organization, select the Business tab.




***Tip:*** If you know the organization is not already a constituent, click **Add** in the **Related organization** field to add the constituent.

a. In the **Related organization** field, search for the organization to add as a business for the individual. If the organization is not already a constituent in the database, you can click **Add** on the Constituent Search screen.

b. Under **Primary business relationship**, select the relationships the individual constituent and the organization have with each other, such as Employee and Employer.

c. In the **Start date** field, enter the date the relationship started, or enter the date you enter the relationship to your database.

d. In the **End date** field, enter the date the relationship ends, such if the individual resigns from the organization. If the relationship is for an undetermined duration, leave this field blank.

e. If the individual constituent is a contact for the organization, select **Individual is a contact** and select the contact type. If the individual is the primary contact for the organization, select **Primary contact**.

f. If the organization matches the donations of the individual constituent, select **This organization will match individual's contributions**.

g. Under **Recognition credits**, select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit to a constituent, specify the type and percentage of recognition credit the constituent receives.

h. If the organization is the employer of the individual, you can enter employment related information, such as the job title, category, or career level of the employee.

14. Click **Save**.

***Note:*** When you click **Save**, the program automatically uses the name and address entered for the constituent to verify the constituent does not already exist in the database. If the program finds another individual constituent with the same last name and address information, the duplicate search screen appears.

The record of the new individual constituent appears.

# Add an Individual from a Constituent

Most of the time when you add a constituent, you want to capture as much information about the constituent as you can. However, when you add an individual relationship to an individual constituent, you may not have as much information. For example, if you know one of your board members plays golf with "Bob Smith" every weekend, you may want to capture that relationship on your board member's constituent record. When you add relationships such as spouses or children, you only need the basic name information as the contact information will be copied from the primary constituent. With the **Add** button on the Add relationship form and the Add household members form, you can quickly add a new constituent.

### Add an individual from a constituent

1. From the Relationships tab of a constituent record, click **Add**, **Individual** or from the Members tab of a household, click **Add**.
2. On the Add relationship or Add household members form, instead of searching for a constituent, click the **Add** button in the **Related constituent** field.

***Note:*** If you are unsure whether the individual is already a constituent, you should first search for the constituent.

3. On the Add individual form, enter the basic biographical information for the constituent. Only last name is required.
4. Click **Save**. You return to the Add relationship or Add household members form where you can continue to enter information about the relationship.

# Add or Update Multiple Constituents through Batch Entry

With *Batch entry*, you can add or update multiple records quickly, without the need to open each separate record. There are two ways to use *Batch entry* to enter data:

- With *Import* and *Batch entry*, you can quickly add information into your database. With *Import*, you can create a process to import information from as a comma-separated value (*.csv) file saved from another program such as Microsoft *Excel*. You base the import process on a batch template, which contains the fields necessary to add or update the information. With the import process, you can generate a batch that contains the new or updated information. From *Batch entry*, you can then validate and commit the batch file to add or update your records.

  For example, you have a list of names and addresses of new constituents that you need to import into the database. After you save this information in a *.csv file, you can import the file into a batch template that contains the fields necessary for the constituent information.
- If you do not have an import file but want to add or update multiple records quickly, you can create a batch of the new or updated information. With a batch, the program lists the fields included in the selected batch template in a spreadsheet so you can efficiently enter information in the database.

***Note:*** For information about *Batch entry* or *Import*, see the *Batch and Import Guide*.

To add or update constituent information, the following batch types are available:

| Batch type | Description |
|---|---|
| Constituent batch | Adds constituent records based on information included in the import file or batch. |
| Constituent update batch | Updates and adds constituent records based on information included in the import file or batch.<br><br>From *Import*, the import process can compare a record ID included in the import file to primary and alternate lookup IDs. During the import process, if the program finds a match in the database, it updates the information in the matched record; if the program fails to find a match, it creates a new record; if the program encounters a possible duplicate record during the process, such as if the record ID in the import file matches the primary lookup ID on one record and the alternate lookup ID on another record, it generates an exception. After the import process completes, you can validate the batch to determine how to handle any potential exceptions before you commit the information. |

# Add an Individual Screen

The Add an individual screen contains three tabs on which you can enter data.

# Individual Tab

The table below explains the items on the Individual tab of the Add an individual screen.

***Note:*** Some of these fields also appear on a simplified "Add an individual" screen accessed from certain areas of the program, such as some constituent search screens.

| Screen Item | Description |
|---|---|
| **Last name**, **First name**, **Middle name** | Enter the name of the individual exactly as it should appear throughout your database such as on pages and reports. |
| **Title** and **Title 2** | Select a title for the individual such as Mr., Mrs., or Ms. You can select a second title if necessary such as “Reverend Dr.” |
| **Suffix** and **Suffix 2** | Select a suffix for the individual such as Sr. or M.D., as necessary. You can select a second suffix if necessary, such as “III Esq.” |
| **Nickname** | Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria. |
| **Maiden name** | Enter a maiden name for the individual as necessary. On the constituent record, the maiden name entered appears as an alias on the Names tab. When you search for individual constituents, you can select to include maiden names in the search criteria. |
| **Marital status** | Select whether the individual constituent is single, married, or divorced. |
| **Birth date** and **Age** | Enter the individual’s date of birth, such as 10/10/1941. If you are unsure of the exact birth date, you can enter a “fuzzy” date, such as the month and year or the year only. If the date contains a year, the constituent’s age is calculated and displayed. |
| **Gender** | Select whether the individual is a male or female. If you are unsure of the individual’s gender, select Unknown. |
| **Address type** | Select the type of address to use as the primary contact for the individual, such as Home or School Residence.<br>When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab. |
| **Country** | Select the country of the individual’s primary address. |
| **Address** | Enter the primary street address or post office box for the individual. |
| **City** | Enter the city or town for the individual’s primary address. |
| **ZIP** | Enter the Zip code for the individual’s primary address. |

| Screen Item | Description |
|---|---|
| **Omit from validation** | With *Data Tune-Up*, you can run an address validation process to verify addresses entered in the database exist. When you run the address validation process, the program automatically updates missing or incomplete address information and standardizes street addresses.<br>To not include the address entered when your organization runs the address validation process, select this checkbox. |
| **Validate** | To run the address validation process to verify the address entered exists, click this button. The address validation process verifies the address, and the program automatically updates the address accordingly.<br>If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. |
| **Do not send mail to this address** | If the individual requests that you not send mail to the primary address, select this checkbox. |
| **Reason** | If you select **Do not send mail to this address**, select why the constituent requests to not receive mail at the primary address. |
| **Phone type** | Select the type of phone number to use as the primary contact for the individual, such as Home or Business.<br>When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab. |
| **Phone number** | Enter the primary phone number for the individual.<br>If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*.<br>If phone formatting is disabled, you can manually enter the phone number as it should appear. |
| **Email type** | Select the type of email address to use as the primary contact for the individual, such as Personal or Business.<br>When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab. |
| **Email address** | Enter the primary email address for the individual. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the individual. |
| **Information source** | Select the information source for the contact information, such as "Family member." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent. |

# Household Tab

The table below explains the items on the Household tab of the Add an individual screen.

| Screen Item | Description |
|---|---|
| **Full name** | Search for the individual to add as a spouse or household member. To quickly find the constituent, enter the name of the constituent and press **TAB**. If the program matches the name to a constituent in the database, the constituent's name appears in the field. If the program matches the name to multiple constituents, the Individual Search screen appears and displays the matched constituents in the **Results** grid. Select the correct constituent or start a new search.<br><br>If the individual is not already a constituent in the database, you can add the constituent from the search screen.<br><br>If you know the individual is not already a constituent, click **Add** in this field to add the constituent. |
| **Copy Individual's primary contact information to Household Member** | When you save the new individual constituent, the program automatically generates or updates a record of the constituent household with the individual. To copy the primary contact information of the individual constituent to the record of the household, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab. |
| **Individual is the** | Select the relationship the individual has with the household member, such as Husband, Wife, or Partner. |
| **Spouse is the** | Select the relationship the household member has with the individual, such as Husband, Wife, or Partner. |
| **Start date** | Enter the date the relationship between the individual and household member began such as the wedding date of a spouse relationship, or enter the date you enter the relationship into your database. |
| **This is the spouse relationship for Individual** | If the household member is the spouse or partner of the individual, select this checkbox. |
| **Copy Individual's primary contact information to Spouse/Household Member** | To copy the primary contact information of the new individual constituent to the record of the new constituent household member or spouse, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab. |

# Business Tab

The table below explains the items on the Business tab of the Add an individual screen.

| Screen Item | Description |
|---|---|
| **Organization name** | Search for the organization to add as a business for the individual.<br>To quickly find the constituent, enter the name of the organization and press **TAB**. If the program matches the name to an organization in the database, the organization's name appears in the field. If the program matches the name to multiple organizations, the Organization Search screen appears and displays the matched organizations in the **Results** grid. Select the correct organization or start a new search.<br>If the organization is not already a constituent in the database, you can add the constituent from the search screen.<br>If you know the organization is not already a constituent, click **Add** in his field to add the constituent. |
| **Individual is the** | Select the relationship the individual has with the organization, such as Employee. |
| **Organization is the** | Select the relationship the organization has with the individual, such as Employer. |
| **Start date** | Enter the date the relationship between the individual and organization began such as the date the organization hires the individual, or enter the date you enter the relationship into your database. |
| **End date** | Enter the date the relationship between the individual and organization ends, such as the date the individual resigns from the organization. If the relationship is for an undetermined duration, leave this field blank. |
| **Individual is a contact** | If the individual is a contact for the organization, select this checkbox. |
| **Contact type** | If you select **Individual is a contact**, select the type of contact of the individual for the organization, such as Corporate Donations. |
| **Primary contact** | If you select **Individual is a contact**, this checkbox is enabled. If the individual is the primary contact for the organization, select this checkbox. When you run communications processes that include the organization, the primary contact receives the communication. |
| **This organization will match individual's contributions** | If the organization is a matching gift company that matches donations made by the individual, select this checkbox. |
| **Recognition credits** | Under **Recognition credits**, select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives. |
| **Employment information** | If the organization is the employer of the individual, enter employment related information such as job title, category, and career level. |

## Add A Household Member

From this screen you can add information about other members of this individual's household. For example, if you have information about the individual's son, you can enter it here.

Once you save the record, household member information displays on the new constituent's Relationships tab. In addition, a constituent record is created for the household member. The household member's constituent record includes the reciprocal relation information.

# Individual Constituent Record

When you add an individual to the database, the program automatically creates a record of the constituent. From the constituent record, you can view and manage information about the individual. You can add personal and address information about the constituent, as well as name formats.

You can also mark a constituent as inactive. To access a constituent record, search the database for the individual. For information about Constituent Search, see Constituent Search on page 61.

At the top of the record, profile information about the individual appears in a series of summary tiles. To minimize all of the tiles on a record, click **Show less.** To expand all the tiles, click **Show more**. Above the summary tiles, the record type, Lookup ID, deceased status, inactive status, and any active constituencies are always visible.

Each application user can configure which tiles are visible for each record type. Additionally you can rearrange tiles to customize the view. To add or remove tiles from the view, click **Customize summary**. The Customize summary tiles screen appears. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

From the constituent record, you can view and manage contact and detail information about the individual. You can also view and manage the name formats, nicknames, and aliases to use with the individual. To help you navigate through this information, the constituent household record contains multiple tabs. Tiles and tabs are linked. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tiles and tabs are automatically updated.

Depending on your system role and security rights, you can perform additional tasks to manage information about the individual from the constituent record.

## Link an Individual Constituent to an Application User

You can link an application user's login name to a corresponding constituent record so you can view information about the user's activities as a constituent.

From the individual constituent's record, click **Edit link to user** under **Tasks**. On the Edit link to user screen, select **Constituent is linked to** and search for the application user to link to the constituent. To return to the constituent record, click **Save**.

# Add a Spouse for an Individual Constituent

From an individual constituent record, you can add a spouse or partner relationship for the constituent.

***Note:*** After you add a spouse relationship, the **Remove spouse** task appears so you can dissolve the relationship as necessary. For information about how to remove a spouse, see Remove a Spouse from an Individual Constituent on page 241.

You can add only one spouse or partner to an individual constituent. From the Relationship tab, you can view the constituent record for the spouse or partner.

### Add a spouse or partner for an individual constituent

1. Open the constituent record of the individual for which to add the spouse relationship. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Add spouse**. The Add a spouse screen appears. For information about the items on this screen, see Add Spouse Screen on page 240.
3. In the **Spouse** field, search for and select the constituent to add as a spouse or partner relationship. To add the spouse or partner as a new constituent, click **Add**.
4. Under **Relationship**, select the relationships the individual and the spouse or partner have with each other, such as Husband and Wife.
5. In the **Start date** field, enter the date the relationship started or the date you enter the relationship to your database.
6. Click **Save**. You return to the individual constituent record. On the Relationships tab, the new spouse relationship appears.

## Add Spouse Screen

The table below explains the items on the Add spouse screen. For information about how to access this screen, see Add a Spouse for an Individual Constituent on page 240.

| Screen Item | Description |
|---|---|
| **Spouse** | Search for and select the constituent to add as a spouse or partner relationship. To add the spouse or partner as a new constituent, click **Add**. |
| **Individual is the** | Select the relationship the individual has with the spouse or partner, such as Husband, Wife, or Partner. |
| **Spouse is the** | Select the relationship the spouse or partner has with the individual, such as Husband, Wife, or Partner. |
| **Start date** | Enter the date the relationship between the individual and the spouse or partner began such as the wedding date, or enter the date you enter the relationship into your database. |

# Remove a Spouse from an Individual Constituent

If a constituent has a spouse relationship, you can remove the relationship such as due to divorce. After you remove a spouse relationship, it no longer appears on the Relationships tab on the individual's constituent record. If the constituent household does not remain intact, you can also dissolve the household.

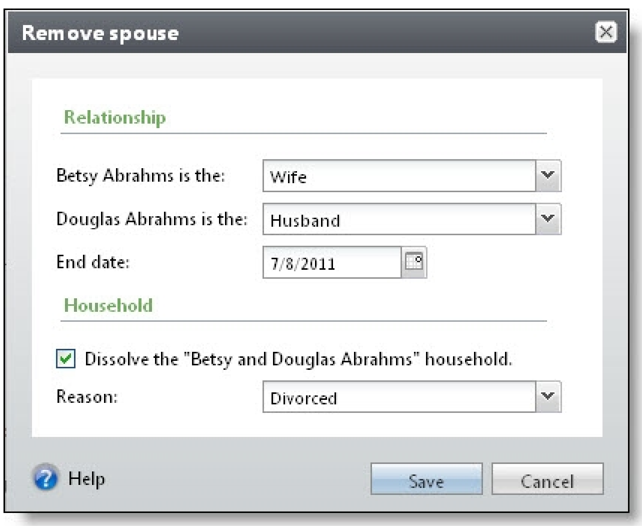
If you dissolve the household at the time you remove the spouse, you must select a reason for the change. Before you can update the household's status, a user with the appropriate security permissions must define reasons in the Dissolved Reason code table in *Administration*.

For information about how to add reason codes, see the *Administration Guide*.

***Note:*** After you remove a spouse relationship, the **Add spouse** task appears on the constituent record so you can add a spouse relationship as necessary. For information about how to add a spouse, see Add a Spouse for an Individual Constituent on page 240.

## Remove a spouse relationship for an individual constituent

1. Open the constituent record of the individual for which to remove the spouse relationship. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Remove spouse**. The Remove spouse screen appears.




3. Select the new relationships for the constituent and the former spouse, such as ex-husband and ex-wife, and the date the spouse relationship ended.
4. If the constituent and spouse are members of a household, select whether to dissolve the household. If you select **Dissolve the household**, select the reason to dissolve the household, such as divorce. For information about the items on this screen, see Remove Spouse Screen on page 242

***Note:*** You must include a reason when you dissolve a household. For information about how to add codes to the Dissolved Reason code table, see the *Administration Guide*.

5. Click **Save**. The Update contact information page appears. On this page, you can manage the contact information for each constituent previously in the spouse relationship. For information about this page, see Update Contact Information Page on page 242.

## Remove Spouse Screen

The table below explains the items on the Remove spouse screen. For information about how to access this screen, see Remove a Spouse from an Individual Constituent on page 241.

| Screen Item | Description |
|---|---|
| **Constituent is the** | Select the constituent's new affiliation to the spouse, such as Ex-Husband. |
| **Spouse is the** | Select the spouse's new affiliation to the constituent, such as Ex-Wife. |
| **End date** | Enter the date the relationship ended, such as the date of the divorce or the day you remove the relationship. |
| **Dissolve the household** | To dissolve the constituent household, select this checkbox. |
| **Reason** | If you select **Dissolve the household**, enter the reason to dissolve the household such as Divorce. |

## Update Contact Information Page

After you remove a spouse relationship from an individual constituent, the Update Contact Information page appears. From this page, you can update contact information for each constituent previously in the spouse relationship.

On the Update contact information page, a tab appears for each constituent previously in the spouse relationship. To update a constituent's contact information or write a letter to a constituent, select the constituent's tab. For information about how to manage constituent contact information, see Contact Information on page 78.

To view the record of an individual constituent, select the constituent's tab and click **Go to Constituent** under **Tasks**. For information about the items on the constituent record, see Individual Constituent Record on page 239.

# Mark an Individual Constituent as Deceased

When an individual constituent passes away, you can mark the constituent as deceased. When you mark a constituent as deceased, you can enter information such as the deceased date. The program automatically retains the information about deceased constituents but excludes them from constituent searches. To search for a deceased constituent, you must first select **Include deceased** on the Constituent Search screen.

After you mark a constituent as deceased, you can edit the deceased date or confirmation information as necessary from the Personal Info tab.

***Note:*** If you use Blackbaud's *DeceasedRecordFinder* service and your system administrator configures the Life Changes options in *Constituents*, the program automatically marks deceased constituents as deceased and updates their constituent records.

***Note:*** Your system administrator may configure the Life Changes options so you can edit information about a deceased constituent from the Deceasing Options page.

If you accidentally or incorrectly mark a constituent as deceased, you can make a constituent marked as deceased active again.

### Mark a constituent as deceased

1. Open the record of the individual constituent to mark as deceased. For information about how to open a constituent record, see Constituent Search on page 61.
2. On the Personal Info tab, click **Mark deceased**. The Mark individual deceased screen appears.
3. In the **Deceased date** field, enter the date the constituent passed away. If you are unsure of the exact date, enter a fuzzy date such as the month and year or year only. If you do not know the date, leave the field blank.
4. In the **Confirmation** field, select how your organization confirms the constituent passed away, such as a death certificate or relative.
5. In the **Source** field, select how your organization first learns the constituent passed away, such as an obituary. Your system administrator determines the options for this field.
6. Click **Save**.
   - If your system administrator configures the Life Changes options to enable users to edit information about deceased constituents, the Deceasing Options page appears. For information about the Deceasing Options page, see Deceasing Options Page on page 37.
   - If your system administrator does not configure the Life Changes options to enable users to edit information about deceased constituents, you return to the constituent record. The **Status** field displays Deceased.

### Mark a deceased constituent as active

1. Open the record of the deceased constituent to mark as active. For information about how to open a constituent record, see Constituent Search on page 61.

   ***Tip:*** To search for a deceased constituent, select **Include deceased** on the Constituent Search screen.
2. Under **Tasks**, click **Undo mark deceased**. A message appears to ask whether to no longer mark the constituent as deceased.
3. Click **Yes**. You return to the constituent record. The **Status** field no longer displays Deceased.

   If your system administrator configures the program to automatically mark deceased constituents as inactive, you must manually mark them as active again. For information about how to mark a constituent as active, see Mark a Constituent as Inactive or Active on page 98.

# Marriage Options

Depending on the options your system administrator configures in *Constituents*, the Marriage Options page appears when you add a spouse to a constituent. On this page, you can review the contact information, names, and household recognition options for the constituents and manage it as needed.

***Note:*** In *Constituents*, your system administrator selects the information that appears on the Marriage Options page. If no information is selected by your system administrator, the Marriage Options page does not appear.

You can manage constituent information that appears on the tabs on the Marriage Options page.

**Contact Information Tab**

On the Contact Information tab, all contact information for the two constituents appears. You can update this information as necessary. For example, you can copy address and phone information from one spouse to the other or from one spouse to the household.

**Interactions Tab**

On the Interactions tab, all specific communication activities and actions between your organization and the constituent appear. You can update this information as necessary. These can include meetings, telephone calls, email messages, and mailings. For example, if the deceased constituent has a pending telephone call interaction with your organization, you can remove it from their record.

**Personal Information Tab**

On the Personal Information tab, all name formats used for the constituents appear. You can update this information as necessary. For example, you can copy names from one spouse to the other.

**Household Recognition Tab**

On the Household Recognition tab, you can view the household recognition options. You can update this information as necessary. For example, you can indicate whether to recognize the household members for revenue from the household.

**Tributes Tab**

On the Tributes tab, all tributes associated with the constituent appear. With tributes, you recognize a donation to your organization in relation or tribute to someone else. For example, after a constituent is marked as deceased, you can create a tribute “In memory of...” to recognize the deceased constituent.

# Organization Constituents



Organization constituent records track important information about the companies, businesses, foundations, and other organizations in your database. When you add an organization constituent, you add details and primary contact information about the organization.

## Organization Search

Before you add an organization constituent record, we recommend you first search the database for the organization to avoid duplicate constituents. After you add an organization constituent, you can use the search screen to later find the constituent.

When you search for a constituent, you can make the search broad or specific, depending on the criteria selected. With a large database, we recommend you enter detailed information to find the records you need. For searches that return more than 100 constituents, only the first 100 appear.

### Search for an organization constituent

1. From *Constituents*, click **Organization search**. The Organization Search screen appears.
2. Enter the search criteria to use, such as name and address information, to find the constituent record. To match the search criteria exactly as entered, select **Match all criteria exactly**.

***Tip:*** If you do not select **Match all criteria exactly**, you can use "wildcard" characters in place of parts of search criteria, such as if you are unsure of an exact spelling. To replace a group of characters, use an asterisk (*) or percent sign (%). To replace a single character, use a question mark (?) or an underscore (_). For example, to return all organizations with a name that ends with "son", enter "*son" or "%son". To find an organization name of Smith or Smyth, enter "Sm?th" or "Sm_th".

3. To use additional search criteria, click **Show advanced search options**. Under **Advanced search options**, select the criteria options to include. For example, select whether to include aliases and only primary addresses in the search.
4. Click **Search**. The program searches the database for organization constituents that match the search criteria entered. In the **Results** grid, the constituents that match the criteria appear. Depending on the search criteria you enter, the search may return one constituent or many.
5. Under **Results**, click the name of the constituent record to open. The record appears.

   If the constituent you want does not appear under **Results**, click **Add** on the action bar. The Add an organization screen appears so you can add the constituent to the database. For information about how to add an organization constituent, see Add Organization Constituents on page 248.

# Organization Search Screen

The table below explains the items on the Organization Search screen. For information about how to access this screen, see Organization Search on page 245.

| Screen Item | Description |
|---|---|
| **Organization name** | Enter the name of the organization to find. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all organizations that begin with Sm appear. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return organizations named Smith. |
| **Lookup ID** | Enter the primary identifier used at your organization. You can enter the entire ID or only the beginning digits. For example, if you enter "1", all lookup IDs that begin with the number 1 appear. |
| **Parent org name** | To find a subsidiary organization, enter the name of its parent organization. |
| **Parent lookup ID** | To find a subsidiary organization, enter the lookup ID of its parent organization. |
| **Country** | Select the country of the organization to find. |
| **Address** | Enter the street address or post office box of the constituent to find, such as 7930 Baker Street. To search only by street name, use a wildcard character in place of the street number, such as "*Baker Street" or "%Baker Street". |
| **City** | Enter the city or town of the constituent to find. |

| Screen Item | Description |
|---|---|
| **State** | Select the state of the constituent to find. |
| **ZIP/Postal code** | Enter the Zip code of the constituent to find. |
| **Industry** | Select the industry of the organization to find. such as Education or Healthcare. |
| **Match all criteria exactly** | To use search criteria exactly as entered, select this checkbox.<br>If you select this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered. |
| **Check aliases** | When you click **Show advanced search options**, this checkbox appears. To include aliases from the Names tab of constituent records in your search, select this checkbox and enter the alias in the name fields. |
| **Check merged constituents** | When you click **Show advanced search options**, this checkbox appears. To include constituents merged from a duplicate constituent check, select this checkbox. |
| **Check alternate lookup IDs** | When you click **Show advanced search options**, this checkbox appears. To include alternate lookup IDs in your search, select this checkbox and enter the alternate lookup ID in the **Lookup ID** field. |
| **Only search parent organizations** | When you click **Show advanced search options**, this checkbox appears. To include only the parent organizations in your search, select this checkbox and enter the primary address information in the address fields. When you select this checkbox, the search does not return organizations marked as the subsidiary of another organization. |
| **Only search primary addresses** | When you click **Show advanced search options**, this checkbox appears. To include only the primary addresses from the Contact tab of the constituent records in your search, select this checkbox and enter the primary address information in the address fields. |
| **Include inactive** | When you click **Show advanced search options**, this checkbox appears. To include constituents marked as inactive in the search, select this checkbox. |
| **Include fuzzy search on name** | When you click **Show advanced search options**, this checkbox appears. To return constituents with names that sound like the search criteria entered, select this checkbox. For example, if you select this checkbox and enter a name of "Smith", the program includes constituents named "Smyth" in the results. |
| **Only search primary organizations** | When you click **Show advanced search options**, this checkbox appears. To include only the organizations marked as the primary organization, such as a main office or headquarters, in your search, select this checkbox and enter the primary address information in the address fields. |
| **Results** | When you click **Search**, this grid displays the constituents that match the search criteria entered. For searches that return more than 100 constituents, only the first 100 appear. |
| **Add** | To add a new organization, such as if the constituent you want does not appear in the search results, click this button on the action bar of the **Results** grid. The Add an organization screen appears so you can add the constituent to the database. For information about how to add an organization constituent, see Add Organization Constituents on page 248. |

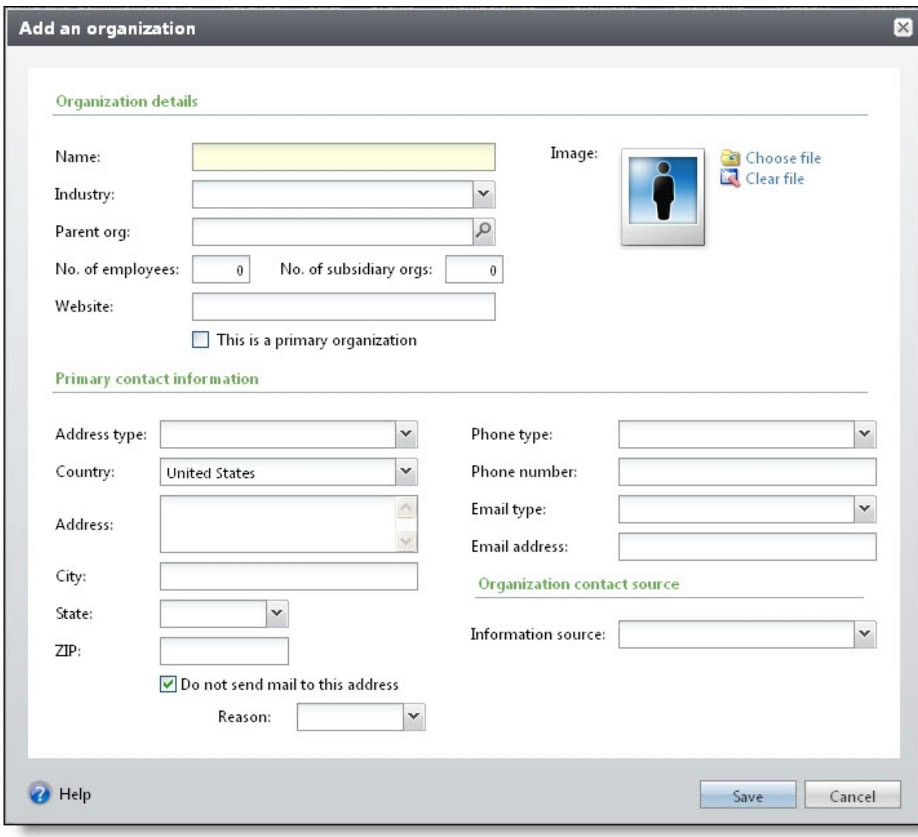
# Add Organization Constituents

Organization constituent records track important information about the companies, businesses, foundations, and other organizations in your database. When you add an organization constituent, you add details and primary contact information about the organization.

## Add an organization constituent

To avoid duplicate constituents, we recommend you first search your database for the constituent before you add a new organization. For information about how to search for an organization constituent, see Organization Search on page 245.

1. From *Constituents*, click **Add an organization**. The Add an organization screen appears. For information about the items on this screen, see Add an Organization Screen on page 250.




2. Under **Organization details**, enter the name of the organization and select its type of industry, such as Health care or Education.
3. If the organization is a subsidiary of another organization, in the **Parent org** field, search for and select the organization that owns and controls the new organization. For information about the Organization Search screen, see Organization Search Screen on page 246.
4. In the **No. of employees** field, enter the number of people employed at the organization.

5. If the organization is a parent organization of other organizations, in the **No. of subsidiary orgs** field, enter the number of subsidiaries the organization owns and controls.
6. In the **Website** field, enter the address to the organization's corporate website.
7. If the location entered is a main headquarters or office of operation for the organization, select **This is a primary organization**.
8. To add an image for the organization such as the company logo:
   a. In the **Image** field, click **Choose file**. The Open screen appears.
   b. Browse to and select the image file to use with the constituent.
   c. Click **Open**. You return to the Add an organization screen. In the **Image** field, the selected image appears.

      To remove the image selected for a constituent, click **Clear file**.
9. Under **Primary contact information**, select the type of address to use as the primary address for the contact, such as Business, and enter the address information.

   If the contact or organization requests that you not send mail to the address, select **Do not send mail to this address**. In the **Reason** field, select why the constituent does not want to receive mail at the address.
10. With *Data Tune-Up*, you can use an address validation service to verify the address entered exists. When you use the address validation service, the program updates missing or incomplete information such as the Zip code and standardizes the street address.

    To not include the address entered when your organization runs the address validation process, select **Omit from validation**.

    To run the address validation process for the address now, click **Validate**. The program updates the address fields accordingly. If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84.
11. In the **Phone type** field, select the type of phone number to use as the primary number for the organization, such as Business. In the **Phone number** field, enter the phone number to use to contact the constituent.
12. In the **Email type** field, select the type of email address to use as the primary email address for the organization. In the **Email address** field, enter the email address to use to contact the constituent.
13. Under **Organization contact source**, select the information source for the contact information, such as "Company's website." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.
14. Click **Save**.

***Note:*** When you click **Save**, the program automatically uses the name and address entered for the constituent to verify the constituent does not already exist in the database. If the program finds another individual constituent with the same last name and address information, the duplicate search screen appears.

The record of the new organization constituent appears. For information about the organization constituent record, see Organization Constituent Record on page 252.

# Add an Organization Screen

The table below explains the items on the Add an organization screen.

| Screen Item | Description |
|---|---|
| **Name** | Enter the name of the organization, exactly as it should appear throughout the program. |
| **Industry** | Select the organization's type of industry such as Health care or Education. |
| **Parent org** | If the organization is the subsidiary of another organization, click the binoculars. The Organization Search screen appears so you can find and select the organization that owns and controls the new organization. |
| **No. of employees** | Enter the number of people employed at the organization. |
| **No. of subsidiary orgs** | If the organization is the parent organization of another organization, enter the number of companies the organization owns and controls. |
| **Website** | Enter the address to the organization's corporate website. On the constituent record, the address entered appears as a link to the organization's website. |
| **This is a primary organization** | If the location entered is the main headquarters or office of operation for the organization, select this checkbox.<br>When you search for an organization, you can select to include only primary organizations in the search results. |
| **Image** | To add an image for the organization such as the company logo, click **Choose file**. The Open screen appears so you can browse to and select the image file to use.<br>To remove an image associated with the constituent, click **Clear file**. |
| **Address type** | Select the type of address to use as the primary contact for the organization, such as Business.<br>When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab. |
| **Country** | Select the country of the organization's primary address. |
| **Address** | Enter the primary street address or post office box for the organization. |
| **City** | Enter the city or town for the organization's primary address. |
| **ZIP** | Enter the Zip code for the organization's primary address. |

| Screen Item | Description |
|---|---|
| **Omit from validation** | With *Data Tune-Up*, you can run an address validation process to verify addresses entered in the database exist. When you run the address validation process, the program automatically updates missing or incomplete address information and standardizes street addresses.<br><br>To not include the address entered when your organization runs the address validation process, select this checkbox. |
| **Validate** | To run the address validation process to verify the address entered exists, click this button. The address validation process verifies the address, and the program automatically updates the address accordingly.<br><br>If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84. |
| **Do not send mail to this address** | If the organization or contact requests that you not send mail to the primary address, select this checkbox. |
| **Reason** | If you select **Do not send mail to this address**, select why the constituent requests to not receive mail at the primary address. |
| **Phone type** | Select the type of phone number to use as the primary contact for the organization, such as Business.<br><br>When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab. |
| **Phone number** | Enter the primary phone number for the organization.<br><br>If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*.<br><br>If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the Administration section of the help file.<br><br>If phone formatting is disabled, you can enter the phone number as it should appear. |
| **Email type** | Select the type of email address to use as the primary contact for the organization, such as Business.<br><br>When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab. |
| **Email address** | Enter the primary email address for the organization. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the organization. |
| **Information source** | Select the information source for the contact information, such as “Company’s website.” Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent. |

# Organization Constituent Record

When you add an organization to the database, the program automatically creates a record of the constituent. From the constituent record, you can view and manage information about the organization. You can add additional information about the organization, such as matching gift conditions and aliases. You can also mark a constituent as inactive. To access an organization constituent record, search the database for the organization. For information about Organization Search, see Organization Search on page 245.

At the top of the record, profile information about the organization appears in a series of summary tiles. To minimize all of the tiles on a record, click **Show less**. To expand all the tiles, click **Show more**. Above the summary tiles, the record type, Lookup ID, inactive status, and any active constituencies are always visible.

Each application user can configure which tiles are visible for each record type. Additionally you can rearrange tiles to customize the view. To add or remove tiles from the view, click **Customize summary**. The Customize summary tiles screen appears. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

From the constituent record, you can view and manage information about the organization. You can also view and manage the name formats and aliases to use with the organization. To help you navigate through this information, the constituent record also contains multiple tabs. Tiles and tabs are linked. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tabs and tiles are automatically updated.

Depending on your system role and security rights, you can perform additional tasks to manage information about the organization from the constituent record.

# Corporate Mergers, Acquisitions, and Dissolutions

When corporations merge, acquire other corporations, or dissolve, you need to update the constituent records in your database. Depending on the situation, you may need to mark an organization constituent record as inactive, add a parent organization to a newly acquired organization, or merge two organization constituents together. To determine which action to take, review the following scenarios.

- When a corporation is acquired by another corporation but remains a distinct entity, add the new parent organization on the Organization tab. For information, see Edit Details for an Organization Constituent on page 121.
- When a corporation dissolves, mark the record as inactive. For information, see Mark a Constituent as Inactive or Active on page 98.
- When two corporations merge to form a new corporation or when a corporation is acquired and merges with an existing corporation, use the **Merge organization** task. For information, see Corporate Mergers on page 253.

- To merge two duplicate constituent records instead of recording a corporate merger, see the Constituent Duplicates chapter in the *Constituent Duplicates and Merge Tasks Guide*.

# Corporate Mergers

When two corporations merge, you can combine the two organization constituents into one new constituent record or combine the two corporations into the primary organization constituent record. For example, when United Airlines and Continental Airlines merge and form United Continental Holdings Inc, you merge the two organization records and create a new primary organization record.

You also merge organization records when a corporation acquires another corporation but dissolves and merges the previous entity into the organization. For example when Google acquires the web feed management company FeedBurner, you merge the two organization records with Google as the primary organization and FeedBurner as the secondary organization.

If a corporation acquires another corporation but maintains the acquired corporation as a distinct entity, you can add the new parent on the Organization tab of the acquired organization constituent record. For information, see Edit Details for an Organization Constituent on page 121.

After you merge organization constituent records, you can view the history of the merger from the Corporate Structure Information page or Organization History tab of the new or primary organization.

When you complete a corporate merger in which the two organization constituents merge into a new organization, the records for the two constituents are marked as inactive. To preserve the history for analysis, we recommend you maintain the constituent records as inactive and not delete.

To merge two duplicate constituent records instead of recording a corporate merger, see the Constituent Duplicates chapter in the *Constituent Duplicates and Merge Tasks Guide*.

## Merge organizations

1. Open the record of the primary organization involved in the corporate merger. For information about how to open an organization constituent record, see Organization Search on page 245.

> ***Tip:*** The organization constituent you open and select to merge from is the primary organization. The primary organization in a corporate merger is the one in to which a secondary organization merges.

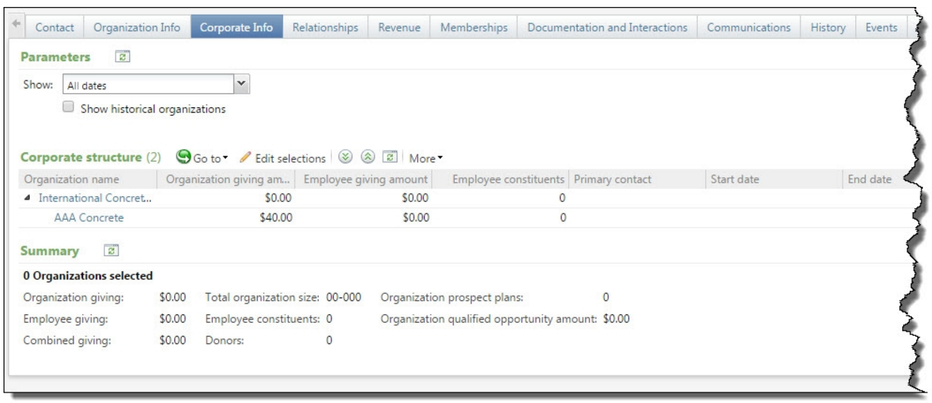
2. Under **Tasks**, click **Merge organization**. The Merge organizations screen appears.
3. Search for and select the secondary organization in the corporate merger.
4. Select whether to merge both organization constituents into a new constituent record. If you select this checkbox, enter the new organization’s name.
5. Enter the date of the merger.
6. Select the reason to mark the organization as inactive. If necessary, enter more details.

> ***Tip:*** When you create a new primary organization constituent from a corporate merger, the two merged records are marked inactive. If you merge the secondary organization into the primary organization, the secondary organization is marked inactive. When an organization is marked inactive, you retain its information but exclude it from searches, reports, and more.

7. Click **Save**. The two organizations merge. You return to the primary organization, or if selected, the new primary organization constituent record appears.

# Corporate Structure Information

When you add an organization relationship to an organization constituent, such as parent corporation or subsidiary or corporate peer organization, you create a corporate structure that strengthens your ability to gather information. You can track these relationships with customized hierarchical summaries that display how relationships connect within the corporate structure. Summaries include information such as organization and employee giving, primary contacts, organization size, and pending giving. You can view corporate summaries from the Corporate structure section of the Corporate Info tab of an organization constituent record.




Under **Corporate structure**, you can view a hierarchical representation of how the organization relationships of the constituent are related, based on parent and subsidiary relationships. To view a list of the subsidiary relationships of a parent organization, click the arrow next to the parent organization. To view corporate peer organizations, click the arrow next to Peers.

In the grid, you can view information about each organization in the hierarchy, such as primary contact and number of employee constituents. From the grid, you can select the organizations to appear in the corporate structure. For information about how to edit the organization included in the hierarchy, see Edit Corporate Structure Selections on page 255.

***Note:*** If you do not specify a parent for an organization, the organization assumes the role of the parent in its hierarchy. To assign a parent relationship to an organization, edit the **Parent org** field on the Organization tab of the constituent record. For information about how to edit the **Parent org** field, see Edit Details for an Organization Constituent on page 121.

To filter the items that appear in the grid, you can select the time frame of the corporate information to view. On the action bar, in the **Show** field, select the date range to view, such as Last 12 Months, and click **Apply**. To remove the filter and display all corporate information again, click **Reset** on the action bar.

***Tip:*** To help ensure accurate results in your corporate summaries, your organization can manage the corporate relationship types in *Administration*. For example, to include those related to an organization as an employee or owner in the employee totals within corporate summaries, you must add Employee and Owner as corporate relationship types. When you view employee data in a corporate summary, those with the designated relationship types appear in the employee totals. For information about how to manage corporate relationship types, see the Administration section of the help file.

***Tip:*** To help ensure accurate results in your corporate summaries, your organization can manage the corporate relationship types in *Administration*. For example, to include those related to an organization as an employee or owner in the employee totals within corporate summaries, you must add Employee and Owner as corporate relationship types. When you view employee data in a corporate summary, those with the designated relationship types appear in the employee totals. For information about how to manage corporate relationship types, see the *Administration Guide*.

Under **Summary**, the giving history for the organizations selected in the **Corporate structure** hierarchy appears. The **Combined giving** field displays the total giving of the selected organizations and their employee contributions. To view additional information about the selected organizations in the corporate structure, click **Go to** on the action bar and select the type of information to view: **Revenue**, **Employee information**, or **Prospect plans**. The Corporate Information page appears and displays information about the selected organizations. For information about the items on this page, see Corporate Information on page 255.

# Edit Corporate Structure Selections

On the Corporate Info tab of an organization constituent, you can view summary information an organization and its related parent or subsidiary companies. You can select the organizations from the corporate structure to include in summary information.

### Edit corporate structure selections

1. Open the record of the organization constituent with the structure selections to edit. For information about how to open an organization constituent record, see Organization Search on page 245.
2. Select the Corporate Info tab.
3. Under **Corporate structure**, click **Edit selections** on the action bar. The Edit Corporate Structure Selections screen appears.
4. Select the organizations to include in corporate summaries. To remove an organization from the summary information, deselect its checkbox.
5. Click **Save**. You return to the Corporate Info tab. Under **Summary**, only information about the selected organization appears.

# Corporate Information

To view additional information about organizations selected in the Corporate structure hierarchy , access the Corporate Info tab.

On this tab, you can view detail information about the revenue, employees, or prospects plans of the selected organizations. To access the Corporate Information page from the record, select the organizations to view, click **Go to** on the action bar, and select **Revenue**, **Employee information**, or **Prospect plans**.

To help you navigate through this information, the Corporate Information page contains multiple tabs.

# Revenue

To view detail information about the revenue of the selected organizations such as pledge payments, employee giving, and membership fees, select the Revenue tab on the Corporate Information page.

On this tab, you can select the type of revenue information to view. The bar chart displays the selected revenue information for the organizations selected to appear in summary information.

- To view information about all gifts, including pledges and recurring gifts related to gifts received from the selected organizations, select **Gifts**.
- To view information about all revenue types, including gifts and event registration fees received from the selected organizations, select **All revenue**.
- To view information about the lifetime giving of the selected organizations and their employees, select **Giving summary**.
- To view information about the combined recognition of the selected organizations and their employees, select **Recognition summary**.

You can filter the information that appears by date range. For example, you can select to view only information about revenue received during the last 30 days. In the **Show** field, select the criteria of the revenue to view and click **Apply**. To remove the filter and display information about all revenue received, click **Reset**.

To change the organizations included in summary information, click **Change Selections**. For information about how to edit the structure selections, see Edit Corporate Structure Selections on page 255.

To return to the Corporate Structure page for the organization constituent, click **Go to corporate structure** on the action bar. For information about the Corporate Structure page, see Corporate Structure Information on page 254.

# Employee Information

To view general information about each organization in the structure and their employees, such as organization size and volunteer totals, select the Employee Information tab on the Corporate Information page.

On this tab, you can select whether to view organization or individual employee summary information. The bar chart displays the selected information for the organizations selected to appear in summary information.

- To view information about the selected organizations such as organization size and employee giving, select **Organization summary**. For employees who are alumni of an academic institution affiliated with your organization, alumni information also appears.

***Note:*** When you select **Organization summary**, the organization size appears as a number range. If the organization experiences sizable growth, we recommend you edit the number of employees entered on the organization record. For information about how to edit the organization record, see Edit Details for an Organization Constituent on page 121.

- To view information about each organization employee who is also a constituent in your database, select **Individual summary**. Constituent information such as last gift date and pending and completed interactions appears.

You can filter the information that applies to a specific date range. For example, you can select to view only summary information about the last 30 days. In the **Show** field, select the criteria of the data to view and click **Apply**. To remove the filter and display all summary information, click **Reset**.

To change the organizations included in summary information, click **Change Selections**. For information about how to edit the structure selections, see Edit Corporate Structure Selections on page 255

To return to the Corporate Structure page for the organization constituent, click **Go to corporate structure** on the action bar. For information about the Corporate Structure page, see Corporate Structure Information on page 254.

# Prospect Plans

To view information about the prospect plans associated each organization in the structure and their employees, such as current stage and primary prospect manager, select the Prospect Plans tab on the Corporate Information page.

On this tab, you can select whether to view organization or individual employee prospect information. The bar chart displays the selected information for the organizations selected to appear in summary information.

- To view prospect information about the selected organizations such as current stage and qualified opportunity amount, select **Organization summary**.
- To view prospect information about each organization employee who is also a prospect in your database, such as primary prospect manager, select **Individual summary**.

You can filter the information that applies to a specific date range. For example, you can select to view only prospect information about the last 30 days. In the **Show** field, select the criteria of the data to view and click **Apply**. To remove the filter and display all prospect information, click **Reset**.

To change the organizations included in summary information, click **Change Selections**. For information about how to edit the structure selections, see Edit Corporate Structure Selections on page 255.

To access a prospect plan, in the **Plan Name** column in the grid near the bottom of the screen, click to link to the plan you want to view.

To return to the Corporate Structure page for the organization constituent, click **Go to corporate structure** on the action bar. For information about the Corporate Structure page, see Corporate Structure Information on page 254.

# Constituent Groups and Households



At your organization, you may find it important to track constituent groups and households. For example, a group of constituents may form a giving circle to pool fund together to donate to your organization in a joint effort. Constituent groups help you track the activities and giving of everyone included in the group. Constituent groups also help your organization recognize revenue received as coming from the group rather than an individual. Before you can add a constituent group to the database, your organization must configure the types of groups it uses.

Households help you track the activities and giving of everyone who lives under one roof. Constituent households also help your organization avoid the creation of duplicate mail for constituents who share an address. When you add an individual relationship for an individual constituent and the related individual is a spouse or shares a household with the constituent, the program automatically creates a record of the constituent household. You can configure whether and how constituent households receive recognition credit for revenue donated by members of the household. When a household member donates to your organization, these configuration settings determine whether you recognize the household, the member, all other household members, or a combination of all three.

# Add Constituent Groups

Your organization may find it important to track groups of constituents. For example, multiple constituents may pool their funds together to donate to your organization in a joint effort or you may have a group of constituents who serve on a committee for your organization. You can add the constituent group to your database. When you add a constituent group, you can enter information about the group and select the members of the group. Each member of the group must be a constituent in your database.

***Note:*** You can add a group without adding individual group members. However, the first individual constituent you add to the group will be marked as the primary group member.

If you want to add a group of constituents as a committee, you can use **Add a committee** to add a group with a constituency of “Committee” or you can add a group and manually assign it the “Committee” constituency. When you add a committee, you can indicate whether or not the committee can coordinate events or solicit revenue, which regular groups cannot do.

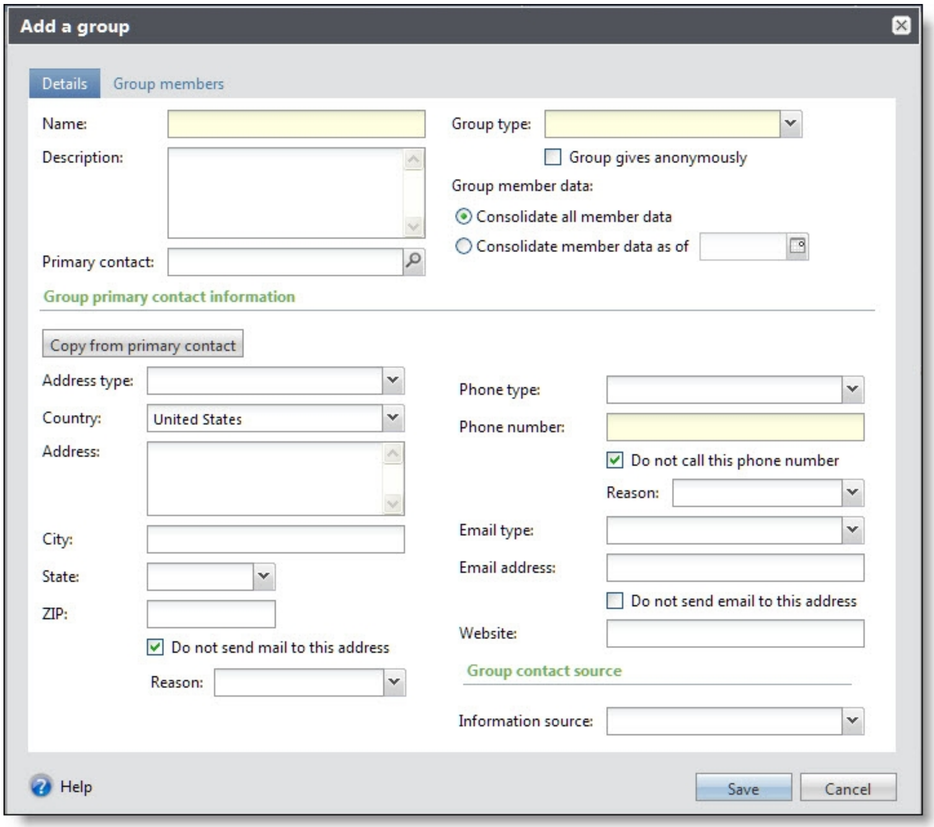
***Note:*** Before you can add a constituent group, you must define its group type in the database.

## Add a constituent group

1. From *Constituents*, click **Add a group**. The Add a group screen appears. Or, to add a group as a committee, click **Add a committee**. The Add a committee screen appears.

   For information about the items on either screen, see Add a Group Screen on page 262.

   ***Note:*** Committees are groups with a constituency of Committee. You can add a group and assign it the committee constituency, or you can click **Add a committee** to add a group that already has the constituency.




2. Select the Details tab.
3. Enter a unique name and description to help identify the group.
4. In the **Primary contact** field, search for and select the constituent who acts as the main contact for the group.

***Note:*** You can add a group without adding individual group members. However, the first individual constituent you add to the group will be marked as the primary group member.

5. In the **Group type** field, select the type of the constituent group.
6. If the selected group type can be a donor, the **Group gives anonymously** checkbox is enabled. If the group requests to donate anonymously, select this checkbox.
7. If you add the group as a committee, select whether the committee can coordinate events, solicit revenue, or set committee goals.
8. Under **Group member data**, select whether summaries about the group should include all constituent information about its members or only constituent information as of a specific date, such as when the group formed. If you select **Consolidate member data as of**, select the date in the field.
9. Under **Group primary contact information**, to use the address information entered for the primary contact, click **Copy from primary contact**. Otherwise, select the type of address to use as the primary address for the group and enter the information.

If the group or contact requests that you not send mail to the address, select **Do not send mail to this address** and select the reason why the group does not want to receive mail at the address.

10. With *Data Tune-Up*, you can use an address validation service to verify the address entered exists. When you use the address validation service, the program updates missing or incomplete information such as the Zip code, and standardizes the street address.

    To not include the address entered when your organization runs the address validation process, select **Omit from validation**.

    To run the address validation process for the address now, click **Validate**. The program updates the address fields accordingly. If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84.

11. In the **Phone type** field, select the type of phone number to use as the primary number for the group. In the **Phone number** field, enter the phone number to use to contact the group.

    If the group requests that you not call the number, select **Do not call this phone number** and select the reason to explain why the number is not to be used, such as Donor preference.

12. In the **Email type** field, select the type of email address to use as the primary email address for the group. In the **Email address** field, enter the email address to use to contact the group.

    If the group requests that you not send email to the address, select **Do not send email to this address**.

13. If the group has a website, in the **Website** field, enter its complete web address.
14. In **Information source**, select the source for the group's contact information to indicate how you received the information.

***Note:*** Sources help you track additional information about the reasons for new or changed contact information. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

15. To add information about the members of the group, select the Members tab.
16. You can mark **Add members individually** to add group members one at a time or you can mark **Add members using a selection** to add multiple constituents at once.

***Note:*** You can add many members at one time using a selection; however, you can only remove members from a group one at a time.

17. Under **Current members**, the primary contact automatically appears. To add an additional member to the group, search for and select the constituents to add as members.
18. To add additional members to the group based on the relationships of a current member:
    a. Under **Current members**, select the constituent with the relationship to add. Under **Find additional constituents**, the relationships of the selected constituent appear. To view the relationships of a constituent under **Find additional constituents**, click the plus sign next to the constituent.
    b. Under **Find additional constituents**, select the constituents to add as members.
    c. Click **Add selected**. Under **Current members**, the selected constituents appear.

***Note:*** To remove a constituent from the **Current members** box, delete the row for the constituent.

19. Click **Save**. The record of the constituent group appears. For information about the items on a constituent group record, see Constituent Group Record on page 265.

# Add a Group Screen

The Add a group screen contains two tabs on which you can enter data.

## Details Tab

| Screen Item | Description |
|---|---|
| **Name** | Enter the name of the constituent group exactly as it should appear throughout your database such as on pages and reports. |
| **Description** | Enter a description to help identify the group. |
| **Primary contact** | Search for and select the constituent who acts as the main contact for the group. When you add a constituent as the primary contact, the constituent is automatically added to the Members tab. You can add a group without adding individual group members. However, the first individual constituent you add to the group will be marked as the primary group member. |
| **Group type** | Select the type of the group, such as Giving circle or Family foundation. Your organization configures the available group types. |
| **Group gives anonymously** | If the group requests to donate anonymously, select this checkbox. |
| **Can coordinate events** | If you add the group as a committee, select whether the group can be assigned as an event coordinator. If you select this checkbox, you can assign event tasks to the group or its members. |
| **Can solicit revenue and set fundraising goals** | If you add the group as a committee, select whether the group can be assigned as a solicitor. If you select this checkbox, you can set fundraising goals and calculate revenue totals for money the group helps raise. |
| **Can set committee goals** | If you add the group as a committee, select whether the group can set non-monetary committee goals. |
| **Group member data** | Select whether summary information about the group should include all constituent information about the group's members or only constituent information as of a specific date, such as when the group formed.<br>If you select **Consolidate member data as of**, select the date in the field. |

| Screen Item | Description |
|---|---|
| **Copy from primary contact** | To use the address, telephone, and email information of the primary contact as the contact information for the group, click this button. |
| **Address type** | Select the type of address to use as the primary contact for the group.<br>When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab. |
| **Country** | Select the country of the group's primary address. |
| **Address** | Enter the primary street address or post office box for the group. |
| **City** | Enter the city or town for the group's primary address. |
| **ZIP** | Enter the Zip code for the group's primary address. |
| **Omit from validation** | With *Data Tune-Up*, you can run an address validation process to verify addresses entered in the database exist. When you run the address validation process, the program automatically updates missing or incomplete address information and standardizes street addresses.<br>To not include the address entered when your organization runs the address validation process, select this checkbox. |
| **Validate** | To run the address validation process to verify the address entered exists, click this button. The address validation process verifies the address, and the program automatically updates the address accordingly.<br>If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84. |
| **Do not send mail to this address** | If the group requests that you not send mail to the primary address, select this checkbox. |
| **Reason** | If you select **Do not send mail to this address**, select why the group requests to not receive mail at the primary address. |

| Screen Item | Description |
|---|---|
| **Phone type** | Select the type of phone number to use as the primary contact for the group, such as Home or Business.<br>When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab. |
| **Phone number** | Enter the primary phone number for the group.<br>If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*.<br>If phone formatting is disabled, you can manually enter the phone number as it should appear. |
| **Do not call this phone number** | If the household requests that you not call the number, select this checkbox. |
| **Reason** | If you select **Do not call this phone number**, this field is enabled. Select why the group requests to not receive calls at the number, such as "Donor preference." If a phone number is no longer valid and you enter a end date for it, you may also set the number to "Do not call" with a reason of "No longer in service." |
| **Email type** | Select the type of email address to use as the primary contact for the group, such as Personal or Business.<br>When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab. |
| **Email address** | Enter the primary email address for the group. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the individual. |
| **Do not send email to this address** | If the household requests that you send email to this email address, select this checkbox. |
| **Website** | If the group has a website, enter the web address. On the constituent record, the web address appears as a link to the website. |
| **Information source** | You can select a source for the group's address information to indicate where or how you received the information. Sources are used to help you track additional information about the reasons contact information is added or changed. |

## Members Tab

The table below explains the items on the Members tab of the Add a group screen.

| Screen Item | Description |
|---|---|
| **Current members** | This box displays the constituents added to the group. When you first add a group, the constituent selected to be the primary contact automatically appears. To add a constituent to the group, search for and select the constituent to add as a member.<br>To remove a member from the group, select and delete the row. |
| **Find additional constituents** | This box displays the relationships of the constituent selected under **Current members**. To view the relationships of a related constituent, click the arrow next to the constituent. To add related constituents to the group, select the constituents to add and click **Add selected**. |
| **Add members using a selection** | Below the Current members section, you can also mark **Add members using a selection**, which enables you to pick a selection of constituents to add to the group at once. You cannot undo the addition of group members using a selection. |

# Constituent Group Record

When you add a constituent group to the database, the program automatically creates a record of the group. From the record, you can view and manage information about the group. You can add member and address information about the group, as well as name formats. To access a constituent group record, search the database for the group.

At the top of the record, profile information about the group appears in a series of summary tiles. To temporarily minimize all of the tiles on a record, click **Show less**. To expand all the tiles, click **Show more**. Above the summary tiles, the record type, Lookup ID, inactive status, and any active constituencies are always visible.

Each application user can configure which tiles are visible for each record type. Additionally you can rearrange tiles to customize the view. To add or remove tiles from the view, click **Customize summary**. The Customize summary tiles screen appears. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

If the group is a committee for your organization, you can assign a constituency of “Committee” to the group. If you added the group using **Add a committee**, the group automatically has a constituency of “Committee.” To view the group record as a committee, from the group, click **Committee** under **View as**. For more information, see Committees on page 282.

From the constituent record, you can view and manage contact and detail information about the group. You can also view and manage the name formats and aliases to use with the group. To help you navigate through this information, the constituent group record contains multiple tabs. Tiles and tabs are linked. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tabs and tiles are automatically updated.

Depending on your system role and security rights, you can perform additional tasks to manage information about the group from the constituent record.

# Edit a Constituent Group

After you add a constituent group, you can edit its details, such as its name and whether it gives anonymously, as necessary.

***Note:*** You can view an audit of the edits made to a constituent's record. From a constituent record, under **More information**, click **History**. The Constituent History page for the record appears. For information about the items on the Constituent History page, see Constituent History on page 217.

### Edit a group

1. Open the record of the constituent group to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Edit group**. The Edit group screen appears. For information about the items on this screen, see Edit Group Screen on page 266.

***Tip:*** To access the Edit group screen, you can also click the picture on the constituent record and click **Edit**.

***Note:*** When a group is a committee, you can edit the committee from the Committee page. From a group with a constituency of Committee, click **Committee** under **View as**. On the Committee page, click **Edit committee** under **Tasks**.

3. Edit the detail information as necessary.
4. Click **Save**. You return to the constituent record.

# Edit Group Screen

The table below explains the items on the Edit group screen. For information about how to access this screen, see Edit a Constituent Group on page 266.

| Screen Item | Description |
|---|---|
| **Name** | Enter the name of the constituent group exactly as it should appear throughout your database such as on pages and reports. |
| **Description** | Enter a description to help identify the group. |
| **Website** | If the group has a website, enter its web address. On the constituent group record, the web address appears as a link to the website. |
| **Group type** | Select the type of the group, such as Giving circle or Family foundation. Your organization determines the available group types. |
| **Group gives anonymously** | If the group requests to donate anonymously, select this checkbox. |

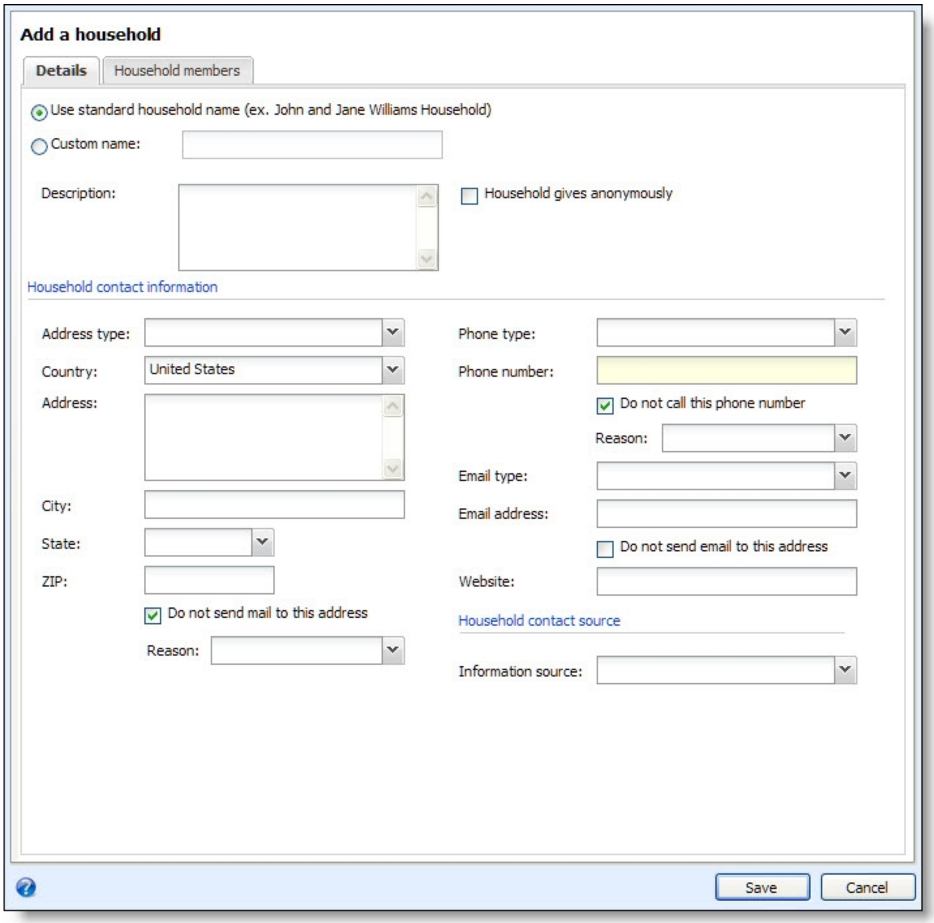
| Screen Item | Description |
|---|---|
| **Can coordinate events** | For a committee, select whether the group can be assigned as an event coordinator. If you select this checkbox, you can assign event tasks to the group or its members. |
| **Can solicit revenue and set fundraising goals** | For a committee, select whether the group can be assigned as a solicitor. If you select this checkbox, you can set fundraising goals and calculate revenue totals for money the group helps raise. |
| **Can set committee goals** | For a committee, select whether the group can set non-monetary committee goals. |
| **Image** | This field displays an image associated with the household, such as a picture of the household. To add an image for the household, click **Choose file**. The Open screen appears so you can browse to and select the image file to use.<br>To remove an image associated with the household, click **Clear file**. |
| **Group member data** | Select whether summary information about the group should include all constituent information about the group's members or only constituent information as of a specific date, such as when the group formed.<br>If you select **Consolidate member data as of**, select the date in the field. |

# Add Households

Your organization may find it important to track households. A household contains multiple individuals who live together at the same address. A household can contain any number of individuals, but an individual can belong to only one household. The record of a household can stand on its own with no related individuals, or it can include multiple related individuals such as husband, wife, son, and daughter. When you add a household, you can enter information about the household and select the members of the household. Each member of the household must be a constituent in your database.

## Add a household

1. From *Constituents*, click **Add a household**. The Add a household screen appears. For information about the items on this screen, see Add a Household Screen on page 271.




2. Select the Details tab.
3. Select whether to use the standard household name format or a custom name. To help further identify the household, enter a description.
4. If the household requests to donate anonymously, select **Household gives anonymously**.
5. Under **Household contact information**, select the type of address to use as the primary address for the household and enter the address information.

   If the household requests that you not send mail to the address, select **Do not send mail to this address** and select the reason why the household does not want to receive mail at the address.

***Note:*** If the houehold includes an existing individual constituent, you can copy the individual’s address to the household from the Household members tab rather than enter the address manually on the Details tab.

6. With *Data Tune-Up*, you can use an address validation service to verify the address entered exists. When you use the address validation service, the program updates missing or incomplete information such as the Zip code and standardizes the street address.

   To not include the address entered when your organization runs the address validation process, select **Omit from validation**.

To run the address validation process for the address now, click **Validate**. The program updates the address fields accordingly. If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84.

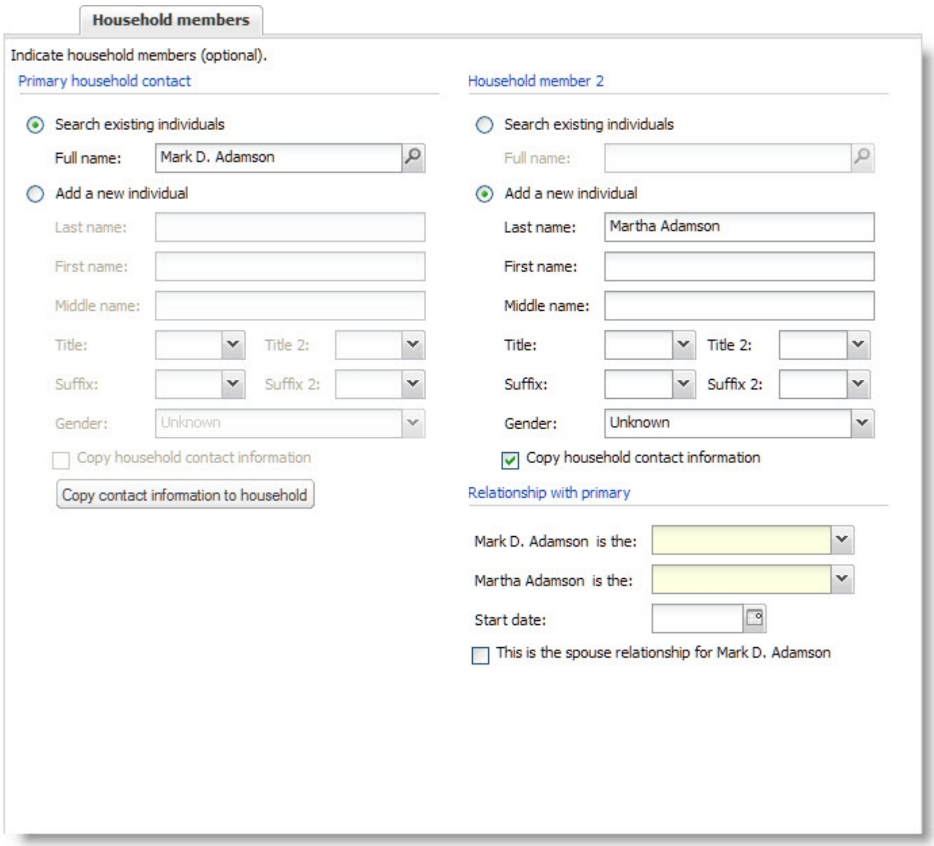
7. In the **Phone type** field, select the type of phone number to use as the primary number for the household. In the **Phone number** field, enter the phone number to use to contact the household.
8. If the household requests that you not call the number, select **Do not call this phone number** and select the reason why the number is not to be used, such as Donor preference.
9. In the **Email type** field, select the type of email address to use as the primary email address for the household. In the **Email address** field, enter the email address to use to contact the household.

   If the household requests that you not send email to the address, select **Do not send email to this address**.
10. If the household has a website, in the **Website** field, enter its complete web address.
11. Under **Household contact source**, select the information source for the contact information, such as Family member.

***Note:*** Sources help you track additional information about the reasons for new or changed contact information. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

12. To add information about the members of the household, select the Household members tab.

***Tip:*** To not associate any individuals with the household, leave the Household members tab blank.




13. Under **Primary household contact**, select whether the primary contact for the household is an existing individual or a new individual.

- If you select **Search existing individuals**, search for and select the primary contact for the household. For information about the search screen, see Constituent Search on page 61.

  To copy the contact information for the existing individual to the household record and replace any contact information entered on the Details tab, click **Copy contact information to household**.

- If you select **Add a new individual**, enter the name, title, and suffix of the primary contact. To use the address information entered for the household as the address information for the new individual, select **Copy household contact information**.

14. To add another member to the household, under **Household member 2**, select whether the second member is an existing individual or a new individual.

- If you select **Search existing individual**, search for and select the household member. For information about the search screen, see Constituent Search on page 61.
- If you select **Add a new individual**, enter the name, title, and suffix of the household member. To use the address information entered for the household as the address information for the new individual, select **Copy household contact information**.

  Under **Relationship with primary**, select the association the primary contact and household member have with each other, the start and end dates of the relationship, and whether the relation is the spouse of the primary contact.

> ***Note:*** When you add a household, you can add only two household members. To add additional household members, select the Members tab of the household record. For information about this tab, see Group or Household Members on page 74.

15. Click **Save**. The record of the constituent household appears. For information about the items on a constituent household record, see Constituent Household Record on page 274.

# Add a Household Screen

The Add a household screen contains two tabs on which you can enter data.

## Details Tab

The table below explains the items on the Details tab of the Add a household screen.

| Screen Item | Description |
|---|---|
| **Use standard Household name** | To use the default name format for households to name the household, select this option. |
| **Custom name** | To use a custom name for the household, select this option and enter the name exactly as it should appear throughout the program such as on pages and reports. |
| **Description** | Enter a description to help identify the household. |
| **Household gives anonymously** | If the household requests to donate anonymously, select this checkbox. |
| **Address type** | Select the type of address to use as the primary contact for the household.<br>When you add a new household, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab. |
| **Country** | Select the country of the household's primary address. |
| **Address** | Enter the primary street address or post office box for the household. |
| **City** | Enter the city or town for the household's primary address. |
| **ZIP** | Enter the Zip code for the household's primary address. |

| Screen Item | Description |
|---|---|
| **Omit from validation** | With *Data Tune-Up*, you can run an address validation process to verify addresses entered in the database exist. When you run the address validation process, the program automatically updates missing or incomplete address information and standardizes street addresses.<br>To not include the address entered when your organization runs the address validation process, select this checkbox. |
| **Validate** | To run the address validation process to verify the address entered exists, click this button. The address validation process verifies the address, and the program automatically updates the address accordingly.<br>If the program cannot validate the address, a message appears to ask whether to search for the address. To select the address from the address validation results, click **Yes**. For information about how to validate a single address, see Validate an Address for a Constituent on page 84. |
| **Do not send mail to this address** | If the household requests that you not send mail to the primary address, select this checkbox. |
| **Reason** | If you select **Do not send mail to this address**, select why the household requests to not receive mail at the primary address. |
| **Phone type** | Select the type of phone number to use as the primary contact for the household, such as Home or Business.<br>When you add a new household, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab. |
| **Phone number** | Enter the primary phone number for the household.<br>If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the *Administration Guide*.<br>If phone formatting is disabled, you can manually enter the phone number as it should appear. |
| **Do not call this phone number** | If the household requests that you not call the number, select this checkbox. |
| **Reason** | If you select **Do not call this phone number**, this field is enabled. Select why the household requests to not receive calls at the number, such as “Donor preference.” If a phone number is no longer valid and you enter a end date for it, you may also set the number to “Do not call” with a reason of “No longer in service.” |

| Screen Item | Description |
|---|---|
| **Email type** | Select the type of email address to use as the primary contact for the household, such as Personal or Business.<br>When you add a new household, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab. |
| **Email address** | Enter the primary email address for the household. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the individual. |
| **Do not send email to this address** | If the household requests that you send email to this email address, select this checkbox. |
| **Website** | If the household has a website, enter the web address. On the constituent record, the web address appears as a link to the website. |
| **Information source** | Select the information source for the contact information, such as Family member.<br>Sourceshelp you track additional information about the reasons for new or changed contact information. The information source appears next to the new or updated contact information on the Contact tab of the constituent. |

# Household Members Tab

The table below explains the items on the Household members tab of the Add a household screen.

| Screen Item | Description |
|---|---|
| **Primary household contact** | Select whether the primary contact for the household is an existing individual or a new individual.<br>If you select **Search existing individual**, search for and select the primary contact.<br>To copy the contact information for the individual to the household record and replace information entered on the Details tab, click **Copy contact information to household**.<br>If you select **Add a new individual**, enter the name of the primary contact to add as an individual. To use the address, telephone, and email information of the household as the contact information for the primary contact, select **Copy household contact information**. |

| Screen Item | Description |
|---|---|
| **Household member 2** | To add a second member to the household, under **Member**, select whether the member is an existing constituent or a new constituent.<br>If you select **Search existing individuals**, search for and select the household member.<br>If you select **Add a new constituent**, enter the name of the household member to add as an individual. To use the address, telephone, and email information of the household as the contact information for the member, select **Copy household contact information**. |
| **Relationship with primary** | If you add a second household member, select the relationship type the primary contact and member have with each other. |
| **Start date** | If you add a second household member, enter the date the relationship between the primary contact and member begins. |
| **This is the spouse relationship for Primary Contact** | If the household member is the spouse or domestic partner of the primary contact, select this checkbox. |

# Constituent Household Record

When you add a constituent household to the database, the program automatically creates a record of the household. From the record, you can view and manage information about the household. You can add member and address information about the household, as well as name formats. To access a constituent household record, search the database for the household. For information about Constituent Search, see Constituent Search on page 61.

At the top of the record, profile information about the household appears in a series of summary tiles. To temporarily minimize all of the tiles on a record, click **Show less**. To expand all the tiles, click **Show more**. Above the summary tiles, the record type, Lookup ID, inactive status, and any active constituencies are always visible.

Each application user can configure which tiles are visible for each record type. Additionally you can rearrange tiles to customize the view. To add or remove tiles from the view, click **Customize summary**. The Customize summary tiles screen appears. For information about how to customize summary tiles, see Customize summary tiles for a constituent record type on page 57.

From the constituent record, you can view and manage contact and detail information about the household. You can also view and manage the name formats and aliases to use with the household. To help you navigate through this information, the constituent household record contains multiple tabs. Tiles and tabs are linked. When you click a link on a tile, the related tab opens. When you add or edit constituent information in a tile or tab, the related tabs and tiles are automatically updated.

Depending on your system role and security rights, you can perform additional tasks to manage information about the household from the constituent record.

# Edit a Constituent Household

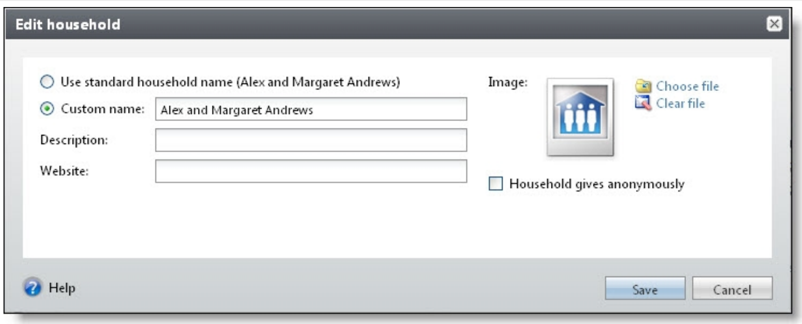
After you add a household, you can edit its details, such as its name and whether it give anonymously, as necessary.

***Note:*** You can view an audit of the edits made to a constituent record. From the constituent record, click **History** under **More information**. The Constituent History page for the record appears. For information about the items on the Constituent History page, see Constituent History on page 217.

### Edit a household

1. Open the record of the constituent household to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Edit household**. The Edit household screen appears. For information about the items on this screen, see Edit Household Screen on page 275.

***Tip:*** To access the Edit household screen, you can also click the picture on the constituent record and click **Edit**.




3. Edit the information as necessary.
4. Click **Save**. You return to the constituent record.

# Edit Household Screen

The table below explains the items on the Edit household screen. For information about how to access this screen, see Edit a Constituent Household on page 275.

| Screen Item | Description |
|---|---|
| **Use standard Household name** | To use the default name format for households to name the household, select this option. |

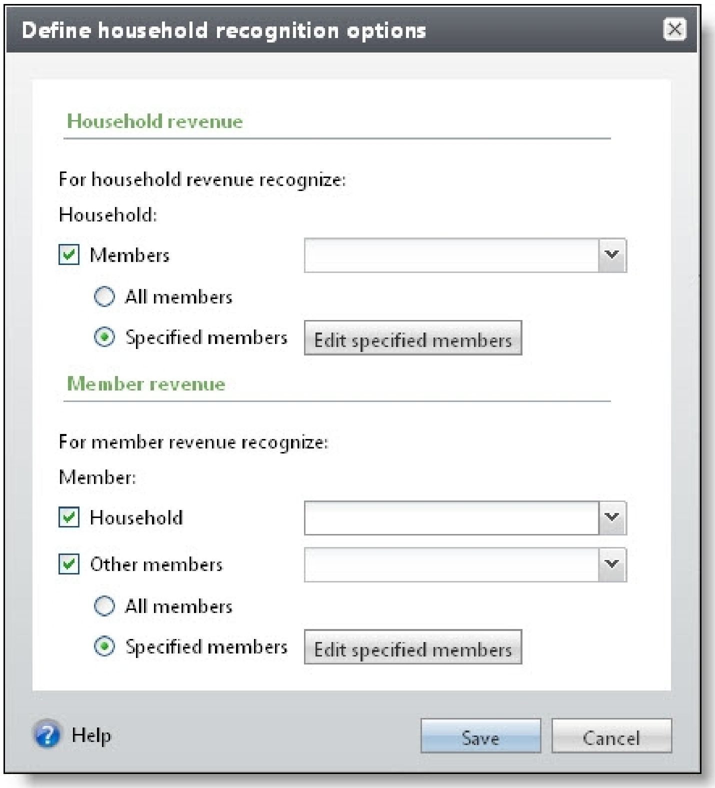
| Screen Item | Description |
|---|---|
| **Custom name** | To use a custom name for the household, select this option and enter the name exactly as it should appear throughout the program such as on pages and reports. |
| **Description** | Enter a description to help identify the household. |
| **Website** | If the household has a personal website or blog, enter its web address. On the constituent household record, the web address appears as a link to the website. |
| **Image** | This field displays an image associated with the household, such as a picture of the household. To add an image for the household, click **Choose file**. The Open screen appears so you can browse to and select the image file to use.<br>To remove an image associated with the household, click **Clear file**. |
| **Household gives anonymously** | If the household requests to donate anonymously, select this checkbox. |

# Define Recognition Options for a Constituent Household

For a specific constituent household, you can override the default household recognition options configured in *Administration*.

### Define household recognition options

1. Open the record of the constituent household with the recognition options to define. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Define household recognition options**. The Define household recognition options screen appears. For information about the items on this screen, see Define Household Recognition Options Screen on page 278.




3. Under **Household revenue**, select whether household members receive recognition credit when your organization receives revenue from the household. If you select **Members**, select whether to apply recognition credit to all members or only specific members of the household.

   If you select **Specified members**, define the members to receive recognition credit.

   a. Click **Edit specified members**. The Define household recognition screen appears.

   b. Under **Member**, select the members to receive recognition credit for revenue from the household.

   c. For each member, specify the type and percentage of recognition credit to apply.

   d. Click **OK**. You return to the Define household recognition options screen.

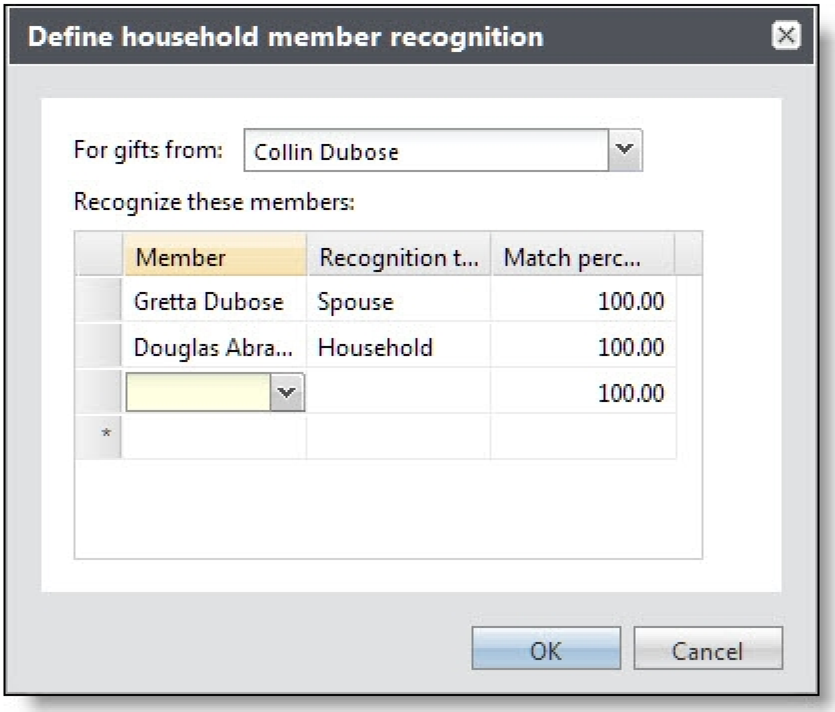
4. Under **Member revenue**, select whether to apply recognition credit to the household or its members when your organization receives revenue from a member of the household.

   If you select **Household**, select the type of recognition credit the household receives.

   If you select **Other members**, select whether to apply recognition credit to all members or only specified members of the household.

   If you select **Specified members**, define the members to receive recognition credit.

   a. Click **Edit specified members**. The Define household member recognition screen appears.




b. In the **For gifts from** field, select the member of the household with revenue for which to define recognition credit.

c. Under **Member**, select the members to receive recognition credit for revenue from the selected member.

d. For each member, specify the type and percentage of recognition credit to apply.

e. Click **Save**. You return to the Define household recognition options screen.

5. Click **Save**. You return to the constituent record.

# Define Household Recognition Options Screen

The table below explains the items on the Define household recognition options screen. For information about how to access this screen, see Define Recognition Options for a Constituent Household on page 276.

| Screen Item | Description |
|---|---|
| **Household revenue** | To apply recognition credit to household members for revenue received from the household, select **Members** and select whether to apply recognition credit to all members or only specific members.<br><br>If you select **Specified members**, click Edit specified members. On the Define household recognition screen, select the members to receive recognition credit and the type and percentage of recognition credit each receives. |

| Screen Item | Description |
|---|---|
| **Member revenue** | To apply recognition credit to the household when its members donate to your organization, select **Household** and select the type of recognition credit the household receives.<br>To apply recognition credit to household members for revenue received from another member, select **Other members** and select whether to apply recognition credit to all members or only specific members.<br>If you select **Specified members**, click **Edit specified members**. On the Define household member recognition screen, select the member with the revenue for which to define recognition credit and the members to receive recognition credit. For each member, specify the type and percentage of recognition credit each receives. |

# Dissolve or Reinstate a Constituent Household

When a member leaves and the household does not remain intact, such as in the case of divorce, you can dissolve a household. When you dissolve a household, the program marks it as inactive so you can assign its members to other households if necessary. After you dissolve a household, you can view its previous members on the Members tab of its record.

***Note:*** You can reinstate a dissolved household, such as if you dissolve the household in error. When you reinstate a household, its status changes from Dissolved to Active. Unless currently members of another household or marked as inactive or deceased, all previous members of the household are automatically reinstated. To reinstate a dissolved household from its record, click **Reinstate household** under **Tasks**. When a message appears to ask whether to reinstate the household, click **Yes**.

# Add a Constituent to a Group or Household

From a constituent record, you can add the constituent to a constituent group or household.

***Note:*** You can add an individual constituent or a constituent household to a constituent group or household. You can add an organization constituent or a constituent group to a constituent group only.

### Add an individual constituent or a constituent household to a group or household

1. Open the record of the constituent to add to a constituent group or household. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Add Constituent to a group or household**. The Add constituent to group or household screen appears.
3. Search for and select the constituent group or household to which to add the constituent.

4. If you add the constituent to a household and recognize members for revenue from other members, the **Recognize for household gifts** checkbox is enabled. To recognize the constituent for revenue received from other members, select this checkbox.

***Note:*** Your organization can configure recognition options for households to specify whether household members receive recognition credit for revenue from other members. For information about how to configure recognition credit for households, see Household Settings on page 32.

5. Click **Save**. The record of the selected constituent group or household appears.

### Add an organization constituent or a constituent group to a group

1. Open the record of the constituent to add to a constituent group. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Add Constituent to group**. The Add constituent to group screen appears.
3. Search for and select the group to which to add the constituent. For information about the Constituent Search screen, see Constituent Search on page 61.
4. Click **Save**. The record of the selected constituent group appears.

### Dissolve a household

1. Open the record of the constituent household to dissolve. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **Tasks**, click **Dissolve household**. The Dissolve household screen appears.
3. In the **Date** field, select the date the household dissolved.
4. In the **Reason** field, select the cause of the dissolution.

***Note:*** You must select a reason when you dissolve a household. For information about how to add codes to the Dissolved Reason code table, see the *Administration Guide*.

5. Click **Save**. You return to the constituent household record. In the summary, a status of **Dissolved** appears. When you search for the household, you must select **Include inactive** on the Search screen for the household to appear in the results.

# Manage Previous Members of a Group or Household

If you select to maintain members' history with a constituent group or household, you can view the previous members of the group or household. From the record of the constituent group or household, click **Previous group members** or **Previous household members** under **More information**. The Previous Members page for the constituent group or household appears.

Under **Previous group members** or **Previous household members**, you can view the members removed from the constituent group or household. For each previous member, you can also view the member's relationship with the primary contact, the dates the member's relationship with the group or household started and ended, and any comments entered about the member's removal.

To view the constituent record of a previous member, click the member's name in the grid.

From the grid, you manage the previous members of the constituent group or household.

# Edit a Previous Group Member

When you remove a member from a constituent group or household and select to maintain the member's history with the group or household, you can edit the end date or comments entered during the member's removal.

### Edit information about a previous group member

1. Open the record of the constituent group or household with the previous membership to edit. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Previous group members** or **Previous household members**. The Previous Members page for the constituent group or household appears.
3. Select the membership to edit and click **Edit**. The Edit membership screen appears.
4. Edit the end date or comments as necessary.
5. Click **Save**. You return to the Previous Members page.

# Reinstate a Previous Member

When you remove a member from a constituent group or household and select to maintain the member's history with the group or household, you can later reinstate the member.

### Reinstate a previous member to a constituent group or household

1. Open the record of the constituent group or household with the previous membership to reinstate. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Previous group members** or **Previous household members**. The Previous Members page for the constituent group or household appears.
3. Select the membership to reinstate.
4. On the action bar, click **Reinstate as group member** or **Reinstate as household member**. A message appears to ask whether to reinstate the member.
5. Click **Yes**. You return to the Previous Members page.

# Delete a Previous Member

When you remove a member from a constituent group or household and select to maintain the member's history with the group or household, you can delete the previous membership. When you delete a previous member from a constituent group or household, you no longer maintain the member's history with the group or household.

### Delete a previous member from a constituent group or household

1. Open the record of the constituent group or household with the previous membership to delete. For information about how to open a constituent record, see Constituent Search on page 61.
2. Under **More information**, click **Previous group members** or **Previous household members**. The Previous Members page for the constituent group or household appears.
3. Select the membership to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to no longer maintain the member's history with the group or household.
5. Click **Yes**. You return to the Previous Members page.

# Committees

To add a committee to the database, you can add a group as the committee or add the Committee constituency to a group. For a committee, you can select whether the group can coordinate events, solicit revenue, or set committee goals—things regular constituent groups cannot do. The Committee record includes basic group information, such as the group summary and group members, as well as committee-specific information such as goals and event tasks.

## Edit Committee

When a group is a committee, you can edit the committee from the Committee page. From a group with a constituency of "Committee," click **Edit committee** under **Tasks**. For more information, see Edit Group Screen on page 266.

## Goals

Committees can set fundraising goals or committee goals.

- Fundraising goals are monetary goals, set by committees that can solicit revenue. To specify that a committee can solicit revenue, when you add or edit the committee, select **Can solicit revenue and set fundraising goals**.
- Committee goals are unit-based, non-monetary goals, such as to recruit a specific number of new members or to achieve a specific number of letters written to change legislation. Committee goals are for committees that can set committee goals. To specify that a committee can set unit-based goals, when you add or edit the committee, select **Can set committee goals**

After you create these goals, you can use key performance indicators (KPIs) to help track their progress. For information about KPIs, see the *Reports and KPIs Guide*.

# Fundraising Goals

Fundraising goals exist only if the committee can solicit revenue. To specify that a committee can solicit revenue, when you add or edit the committee, select **Can solicit revenue and set fundraising goals**. With fundraising goals, you can track the committee’s progress toward raising a specified amount. On the Committee tab of the Committee record, select the Fundraising Goals tab to manage the fundraising goals of the committee.

Under **Fundraising goals**, you can add and manage the monetary goals of the committee. For each goal, you can create a key performance indicator (KPI) to track its progress. When you select a goal with a KPI, the KPI appears. When the group is listed as a solicitor on revenue, the program automatically tracks the sum of the revenue as progress toward the goal.

A committee may also be associated with a campaign. On the Campaigns tab within the Committee tab, you can add and manage campaigns. Any goals for the committee's campaigns also appear on the Fundraising Goals tab. You can edit a campaign's goals from the campaign itself. To access the record of a campaign, click its name on the Campaigns tab.

### Add a fundraising goal

1. On the record of a group with a constituency of Committee, select the Committee tab, and then select the Fundraising Goals subtab.

   ***Note:*** The Fundraising Goals tab appears for committees that can solicit revenue. To specify that a committee can solicit revenue, when you add or edit the committee, select **Can solicit revenue and set fundraising goals**.

2. Under **Fundraising goals**, click **Add goal**. The Add a goal screen appears.
3. Enter a unique name to help identify the goal.
4. In the **Goal** field, enter the monetary amount the committee should raise.
5. Select the start and end dates for the period of time the group should work to accomplish the goal.
6. Enter a description for the fundraising goal.
7. Click **Save**. You return to the Fundraising Goals tab.

### Edit a fundraising goal

1. On the record of a group with a constituency of Committee, select the Committee tab and then the Fundraising Goals subtab.
2. Under **Fundraising goals**, select the goal to edit.
3. On the action bar, click **Edit goal**. The Edit goal screen appears.
4. Edit the information about the goal.

   ***Note:*** You cannot manually edit the progress toward the goal. When the group is listed as a solicitor on revenue, the program automatically tracks the sum of the revenue as progress toward the goal.

5. Click **Save**. You return to the Fundraising Goals tab.

### Delete a fundraising goal

You can delete a fundraising goal for a committee, such as if it no longer applies. When you delete a fundraising goal, you do not affect the revenue counted toward the goal. However, the goal and its progress no longer appear on the Committee Fundraising and Giving report for the committee.

To delete a fundraising goal, from the constituent record of the committee, select the Committee tab and then the Fundraising Goals subtab. Under **Fundraising goals**, select the goal you want to delete and click **Delete** on the action bar. When a message appears to ask whether to delete the goal, click **Yes**.

## Committee Goals

Committees can have goals that are not monetary in nature, such as a goal for a total number of letters in a letter-writing campaign. Committee goals exist only if the committee can set non-monetary committee goals. To specify that a committee can set unit-based goals, when you add or edit the committee, select **Can set committee goals**.

On the Committee Goals tab within the Committee tab, you can manage the non-monetary goals of the committee.

### Add a committee goal

1. On the record of a group with a constituency of Committee, select the Committee tab, and then select the Committee Goals subtab.

   ***Note:*** The Committee Goals tab appears for committees that can set committee goals. To specify that a committee can set these goals, when you add or edit the committee, select **Can set committee goals**.

2. Under **Committee goals**, click **Add goal** on the action bar. The Add a goal screen appears.
3. Enter a unique name to help identify the goal, such as "New volunteer recruitment."
4. In the **Goal** field, enter the value the committee should achieve. For example, for volunteer recruitment, a goal could be 100.
5. Select the type of goal to set for the committee, such as Advocacy or Volunteer recruitment.
6. Select the start and end dates for the period of time the group should work to accomplish the goal.
7. Enter a description for the committee goal.
8. Click **Save**. You return to the Committee Goals tab.

### Edit a committee goal

1. On the record of a group with a constituency of Committee, click **Committee** under **View as**. The Committee page appears.

2. Select the Committee Goals tab.
3. Under **Committee goals**, select the goal to edit.
4. On the action bar, click **Edit goal**. The Edit goal screen appears.
5. Edit the information as necessary.

> ***Note:*** To update the progress toward the goal, select the goal on the Committee Goals tab and click **Update progress** on the action bar.

6. Click **Save**. You return to the Committee Goals tab.

### Update progress toward a committee goal

On the Committee record, you can update the committee's progress toward a committee goal. On the Committee Goals tab within the Committee tab, select the goal and click **Update progress** on the action bar. On the Update goal progress screen, enter the new value to indicate the committee's progress, such as the number of letters for a letter-writing campaign.

### Delete a committee goal

You can delete a committee goal for a committee, such as if it no longer applies. When you remove a goal, its progress no longer appears on the Committee Fundraising and Giving report for the committee.

To delete a committee goal, from the constituent record of the committee, select the Committee tab and then the Committee Goals subtab. Under **Committee goals**, select the goal and click **Delete** on the action bar. When a message appears to ask whether to delete the goal, click **Yes**.

# Campaigns

The Campaigns tab appears within the Committee tab for committees that can solicit revenue. To specify that a committee can solicit revenue, when you add or edit the committee, select **Can solicit revenue and set fundraising goals**. On the Campaigns tab within the Committee tab, you can associate the committee to campaigns.

When you associate a committee with a campaign, the committee becomes a fundraiser for the campaign, and the goals for the campaign appear on the Fundraising Goals tab within the Committee tab.

### Add a committee as a campaign fundraiser

1. On the record of a group with a constituency of Committee, select the Committee tab, and then select the Campaigns subtab.

   > ***Note:*** The Campaigns tab appears for committees that can solicit revenue. To specify that a committee can solicit revenue, when you add or edit the committee, select **Can solicit revenue and set fundraising goals**.

2. Under **Campaigns**, click **Add**on the action bar. The Add committee as campaign fundraiser screen appears.
3. Search for and select the campaign to assign to the committee.

   ***Note:*** On the Committee record, goals of the campaign appear as fundraising goals for the committee. However, you can edit these goals only from the campaign, not from the committee.
4. Select the position to assign to the committee as a fundraiser for the campaign.
5. Select the task to assign the committee as a fundraiser for the campaign.
6. Select the start and end dates for the period of time the group should work with the campaign.
7. Click **Save**. You return to the Campaigns tab.

### Remove a campaign from a committee

If a committee is no longer a fundraiser for a campaign, you can delete the campaign from the committee. When you delete the campaign from the committee, you do not delete the campaign from the database. You only remove it from the committee.

To remove a campaign, from the Committee record, select the Committee tab and then the Campaigns subtab. Select the campaign you want to delete and click **Delete** on the action bar. When a message appears to ask whether to delete the campaign, click **Yes**.

# Events

The Events tab appears within the Committee tab for committees that can manage events. To specify that a committee can manage events, when you add or edit the committee, select **Can coordinate events**. On the Events tab within the Committee tab, you can add the events that the committee helps coordinate

***Note:*** On an event record, you can add the committee as a coordinator on the Tasks/Coordinators tab.

# Add a Committee as an Event Coordinator

If a committee helps coordinate or plan an event, you can add the event to the committee. When you add an event to a committee, the committee appears as an event coordinator on the Tasks/Coordinators tab on the event record and an event summary appears on the Events tab within the Committee tab of the Committee record.

From the Committee record, you can add a committee as the coordinator of an existing event. On the Events tab within the Committee tab, click **Add** under **Events**. On the Add committee as event coordinator screen, search for the event to assign to the committee as a coordinator and select whether the committee is the primary coordinator for the event. To return to the Events tab, click **Save**.

# Remove an Event from a Committee

If a committee is no longer a coordinator for an event, you can delete the event from the committee. When you delete the event from the committee, you do not delete the event from the database. You only remove it from the committee.

To remove a event, from the Committee record, select the event on the Events tab within the Committee tab and click **Delete** on the action bar. When a message appears to ask whether to delete the event, click **Yes**.

# Recognition Programs



Special recognition programs and levels, which you define, can be awarded to constituents for accumulating recognition credits totaling minimum level amounts.

***Note:*** Recognition programs and levels are based on recognition credits for qualified transactions, not on the actual revenue transactions. If a constituent makes a donation and the spouse receives recognition credit, the spouse may be eligible for the recognition program and level even though the payment is from another constituent.

Recognition programs have levels with a required minimum gift amount. The recognition level is achieved after one or more gifts from the constituent total the minimum amount. For example, a recognition program may have multiple levels. If Mark Adamson gave one or more gifts totaling $1500, he would qualify for the Bronze Level. If he gave another gift of $1500, bringing his total giving to $3000, he would qualify for the Silver Level.

| President's Club | |
|---|---|
| Bronze Level | Minimum giving is $1000 |
| Silver Level | Minimum giving is $2500 |
| Gold Level | Minimum giving is $5000 |

***Note:*** When you set up the levels for the recognition program, you determine what types of revenue, such as event registrations or donations, are included in the calculations.

# Recognition Programs: The Big Picture

### 1. Create a recognition program.

First, you must create a recognition program and levels. For details, see Recognition Programs on page 290.

### 2. Configure a constituent recognition process.

Next, you must configure a constituent recognition process to automatically assign constituents into specific recognition programs and levels based on their giving. For details, see Constituent Recognition Process Tasks on page 297.

### 3. Run the recognition process.

Then, you can run the constituent recognition process. You can do this manually or you can set up the process to run automatically. For details, see Run a constituent recognition process on page 298.

### 4. Report or query on constituents.

After the recognition process runs, you can query or report to see which constituents are in the different programs and levels. Be sure to let them know and thank them!

# Programs and Levels

Recognition programs and levels are based on recognition credits for qualified transactions, not on the actual revenue transactions. If a constituent makes a donation and the spouse receives recognition credit, the spouse may be eligible for the recognition program and level even though the payment is from another constituent.

Recognition programs include levels that define requirements for awarding recognition levels for constituents. For example, recognition program levels require a minimum amount for inclusion. The recognition program and level is achieved after the sum of qualifying recognition credits is calculated.

***Note:*** You run a recognition business process to calculate recognition credit amount totals and assign the appropriate recognition levels for constituents. For information about this process, see Constituent Recognition Process Tasks on page 297.

When you create a recognition program, on the Program tab, you enter basic information for the program, such as name and expiration. On the Recognition Criteria tab, you select recognition criteria requirements for the program. This includes a maximum gift amount. Constituents in the program cannot donate a single gift more than the maximum amount for recognition in the program. For example, the maximum gift amount for the program is $10,000 and a constituent donates a single gift of $15,000. The constituent does not receive recognition in the program.

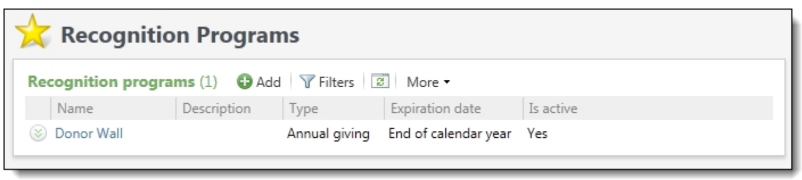
After you create a recognition program, you create recognition levels for the program. Recognition levels further define revenue requirements for a constituent, based on minimum amounts per level.

| President's Club | |
|---|---|
| Bronze Level | Minimum giving is $1000 |
| Silver Level | Minimum giving is $2500 |
| Gold Level | Minimum giving is $5000 |

Constituents who donate and receive recognition credit for less than the minimum amount will not be awarded that recognition program and level. For example, for the President's Club recognition program, a total gift amount of $1000 with recognition credit earns the Bronze level, $2500 earns the Silver level, and $5000 earns the Gold level.

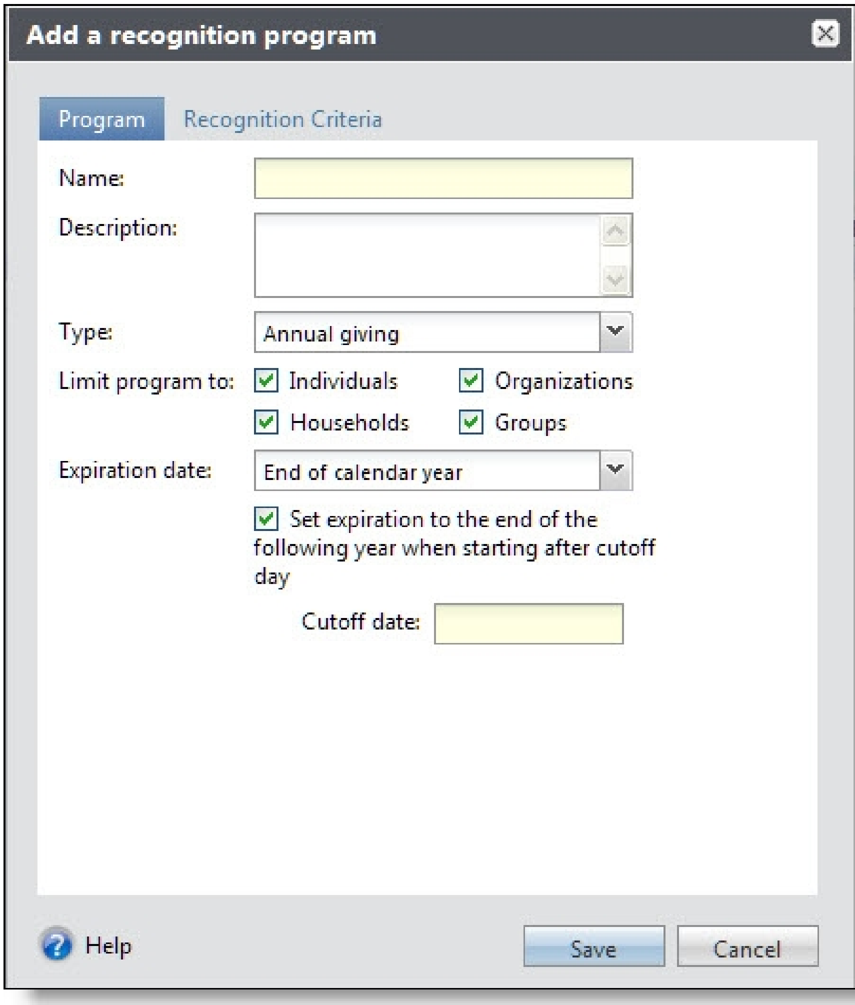
# Recognition Programs

With recognition programs, you can evaluate and recognize giving from your constituents. You can create different recognition programs, such as an annual donor wall. When your organization no longer uses a recognition program, you can mark it inactive. To view and manage your recognition programs, from *Constituents*, click **Recognition programs**. The Recognition Programs page appears.




## Add a recognition program

1. From *Constituents*, click **Recognition programs**. The Recognition Programs page appears.
2. Under **Recognition programs**, click **Add**. The Add a recognition program screen appears.

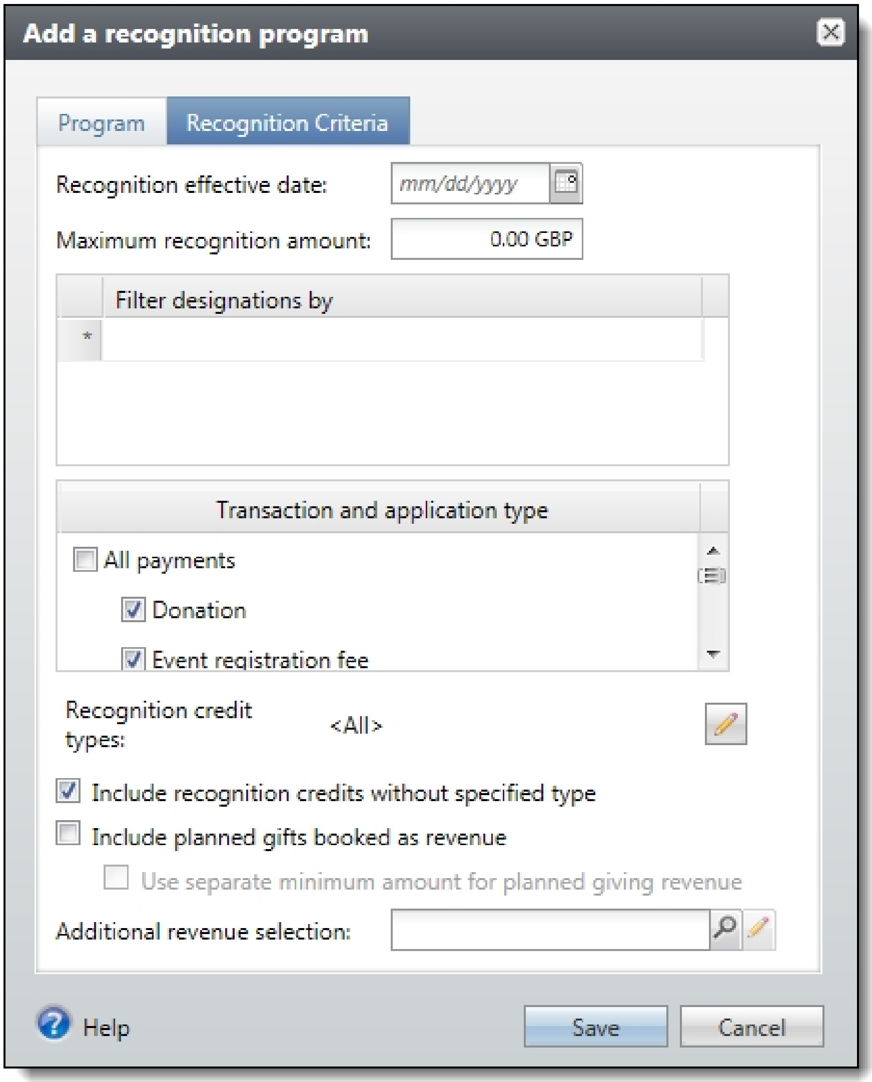



3. Enter a name and description for the recognition program.
4. Select the type of constituent giving recognized by the program, such as Annual giving or Lifetime giving.

   Your selection affects other fields on the screen. If you select Lifetime giving, the expiration and cutoff information is disabled.
5. In **Limit program to**, select the types of constituents eligible for the program. For example, if the program applies to individuals only, select **Individuals**. You must select at least one type.
6. For the **Expiration date**, select the date to use to calculate the expiration for the recognition program.
   - To expire the program on December 31, select "End of calendar year."
   - To expire the program on the last day of the fiscal year, select "End of fiscal year."
7. To establish a cutoff date for the program expiration date, select the checkbox.
8. Enter the month and day for the cutoff day. This provides additional recognition time for constituents in the program near the expiration date. For example, you enter 09/01 for the cutoff

date. When a constituent joins on or after September 1, the recognition program expires December 31 of the *next* calendar year.

9. Select the Recognition Criteria tab.




10. Select the date when the program should begin to recognize transactions and the corresponding recognition credits.
11. Enter the maximum amount to recognize with the program. For an annual program with lower levels that you use to cultivate and encourage newer donors, you might not want to include gifts over $5000. The larger amounts from donors may be recognized in a different way, more personal way by your organization. If a constituent gives more than one gift, he might be qualified for a level in a recognition program only if the gift does not exceed the maximum recognition amount.
12. In **Filter designations by**, to recognize revenue toward only specific designations, search for and select the applicable designations.

13. Under Transaction and application types, select the types of revenue transactions and applications to recognize with the program.

    ***Note:*** Recognition programs and levels are based on recognition credits for qualified transactions, not on revenue transaction amounts.

14. You can include or exclude recognition credit types. To include a new recognition credit type, for **Available recognition credit types**, click the button. You can then select the credit types to include.
15. To include an unspecified recognition credit type, select the **Include recognition credits without specified type** checkbox.
16. To include planned gifts added as revenue in the recognition program, select the **Include planned gifts booked as revenue** checkbox. If you select **Include planned gifts booked as revenue**, select whether to use a separate minimum amount for planned giving revenue. To set the amounts, you must edit the levels of the recognition program.
17. In the Additional revenue selection field, you can limit your results to transactions which match the criteria on the Recognition Criteria tab AND are included in a specified revenue selection.
18. Click **Save**.

## Edit recognition programs

1. From *Constituents*, click **Recognition programs**. The Recognition Programs page appears.
2. Under **Recognition programs**, select the program to edit and click **Edit**. The Edit a recognition program screen appears.
3. Enter a name and description for the recognition program.
4. When you edit a recognition program, you cannot change the **Type**.

   The type of program affects other fields on the screen. If the **Type** is Lifetime giving, the expiration and cutoff information is disabled.
5. When you edit a recognition program, you cannot change the **Limit program to** options.
6. For annual programs, set the **Expiration date**.
   - To expire the program on December 31, select "End of calendar year."
   - To expire the program on the last day of the fiscal year, select "End of fiscal year."
7. To establish a cutoff date for the program expiration date, select the checkbox.
8. Enter the month and day for the cutoff day. This provides additional recognition time for constituents in the program near the expiration date. For example, you enter 09/01 for the cutoff date. When a constituent joins on or after September 1, the recognition program expires December 31 of the *next* calendar year.
9. To edit the recognition criteria for the program, go the Recognition Criteria tab of a recognition program page and click **Edit** under Recognition credit criteria or under Filter designations by. For more information, see Edit recognition criteria or designations for a recognition program on page 294.
10. Click **Save**. You return to the Recognition Programs page.

### Edit recognition criteria or designations for a recognition program

1. On the recognition program record, select the Recognition Criteria tab.
2. The Recognition Criteria tab applies to the overall recognition program, not the individual recognition levels.
3. To edit the recognition criteria for the program to recogniz, click **Edit** under **Recognition credit criteria**.
4. Enter the maximum amount to recognize with the program. For an annual program with lower levels that you use to cultivate and encourage newer donors, you might not want to include gifts over $5000. The larger amounts from donors may be recognized in a different way, more personal way by your organization. If a constituent gives more than one gift, he might be qualified for a level in a recognition program only if the gift does not exceed the maximum recognition amount.
5. In **Filter designations by**, to recognize revenue toward only specific designations, search for and select the applicable designations.
6. Under Transaction and application types, select the types of revenue transactions and applications to recognize with the program.

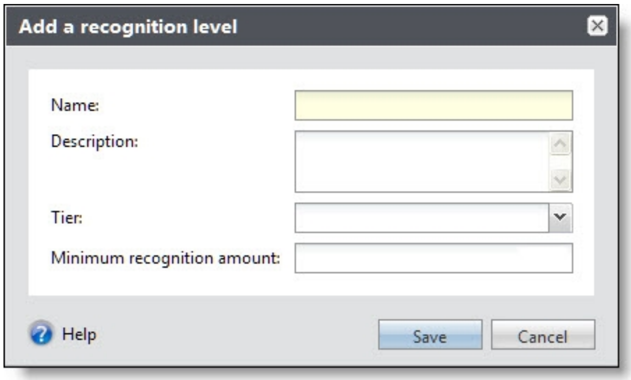
   Recognition programs and levels are based on recognition credits for qualified transactions, not on revenue transaction amounts.
7. You can include or exclude recognition credit types. To include a new recognition credit type, for **Available recognition credit types**, click the button. You can then select the credit types to include.
8. To include an unspecified recognition credit type, select the **Include recognition credits without specified type** checkbox.
9. To include planned gifts added as revenue in the recognition program, select the **Include planned gifts booked as revenue** checkbox. If you select **Include planned gifts booked as revenue**, select whether to use a separate minimum amount for planned giving revenue. To set the amounts, you must edit the levels of the recognition program.
10. In the Additional revenue selection field, you can limit your results to transactions which match the criteria on the Recognition Criteria tab AND are included in a specified revenue selection.
11. Click **Save**. You return to the Recognition Criteria tab.
12. To edit the designations for the program, click **Edit** under **Filter designations by**. The Edit designation filters screen appears.
13. Select the designations to use to recognize revenue recognition credits.
14. Click **Save**.

# Recognition Levels

Each recognition program includes recognition levels such as a Gold, Silver, and Bronze level. Each level is designated by a minimum gift amount.

## Add a recognition level

1. On the recognition program record, select the Recognition Levels tab.
2. Under **Recognition levels**, click **Add**. The Add a recognition level screen appears.



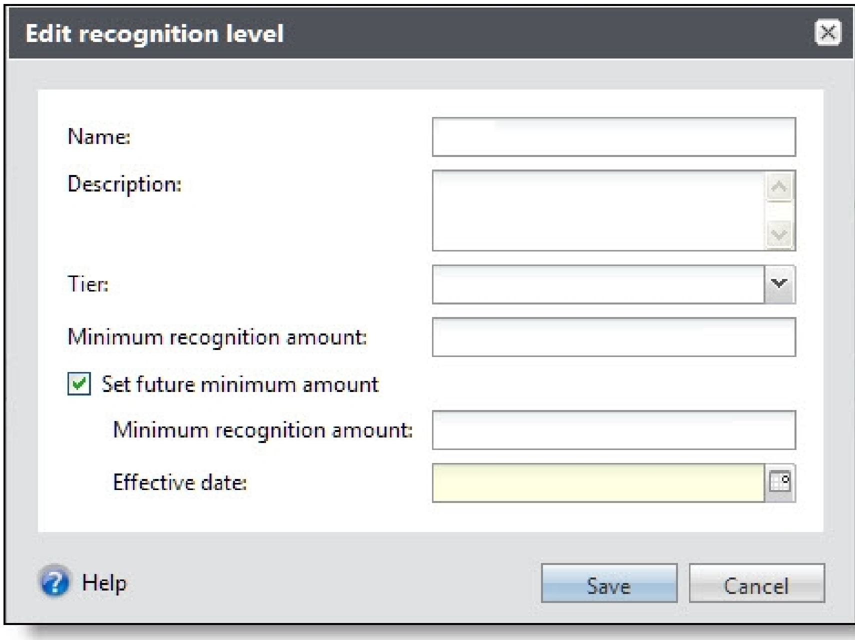

3. Enter a unique name and description to help identify the level.
4. To help categorize constituents within the level, select the tier of the program to associate with the level, such as Regular or Premiere.

   ***Note:*** Tiers are set up in the Membership > Reporting group code table in *Administration*. They can be associated with membership levels, as well as with recognition program levels.

5. In the **Minimum recognition amount** field, enter the minimum amount a constituent must donate for recognition at this level.
6. If you selected **Use separate minimum amount for planned giving revenue** on the Recognition Criteria tab for the recognition program, you can enter the minimum amount of planned gifts recognized at the level.
7. Click **Save**. The record of the recognition level appears.

## Edit basic recognition level information

1. On the Recognition Levels tab of a recognition program record, you can select a level and click **Edit**. The Edit recognition level screen appears.




2. You can edit the name and description for the level.
3. To help categorize constituents within the level, select the tier of the program to associate with the level, such as Regular or Premiere.

> ***Note:*** Tiers are set up in the Membership > Reporting group code table in *Administration*. They can be associated with membership levels, as well as with recognition program levels.

4. In the **Minimum recognition amount** field, enter the minimum amount a constituent must donate for recognition at this level.
5. If you selected **Use separate minimum amount for planned giving revenue** on the Recognition Criteria tab for the recognition program, enter the minimum amount of planned gifts recognized at the level.
6. If you want to establish new giving requirements for the level in the future, select the **Set future minimum amount** checkbox and enter another minimum amount for future recognition at this level in the **Minimum recognition amount** field.
7. If you selected **Use separate minimum amount for planned giving revenue** on the Recognition Criteria tab for the recognition program, a future **Planned giving amount** field appears for you to enter another planned giving minimum amount for future recognition.
8. If you selected **Set future minimum amount** on the Edit recognition level screen, the **Effective date** is required. Enter the future date to activate the recognition level with the future minimum amount requirements.
9. Click **Save**. The record of the recognition level appears.

## Edit benefits and minimum amounts for a recognition level

1. On the Recognition Levels tab of the recognition program record, click the name of the level to edit. The recognition level page appears.

2. To edit the benefits that constituents at the recognition level receive, on the Benefits tab, click **Edit**. The Edit benefits screen appears. You can add or change a benefit, quantity, unit value, or details. The **Total value** is automatically calculated with the **Quantity** number multiplied by the **Unit value** amount. For example, if you enter 2 in the **Quantity** column and $5 in the **Unit value** column, $10 defaults in the **Total value** column. This column is disabled and cannot be changed.
3. Click **Save**.
4. To edit the minimum recognition amounts for the level, on the Minimum Recognition Amounts tab for the level, select the amount and click **Edit**. The Edit recognition minimum amount screen appears. You can edit the **Minimum recognition amount** and, if applicable, the **Planned giving amount**.
5. Click **Save**.

## Recognized Donors

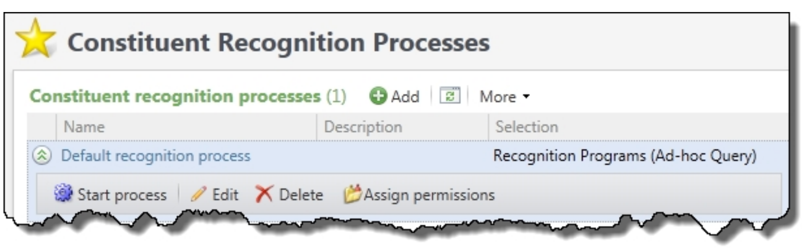
On the Recognized Donors tab of each recognition program page, you can view a list of donors that have been awarded membership to the program.

# Constituent Recognition Process Tasks

To automatically assign recognition levels to constituents, use constituent recognition processes. When you set up and run a constituent recognition process, the program calculates the sum of all qualifying recognition credit amounts for a constituent to assign the highest recognition level the constituent has achieved. The process runs based on recognition program criteria you select.

***Note:*** Recognition programs and levels are based on recognition credits for qualified transactions, not on the actual revenue transactions. If a constituent makes a donation and the spouse receives recognition credit, the spouse may be eligible for the recognition program and level even though the payment is from another constituent.

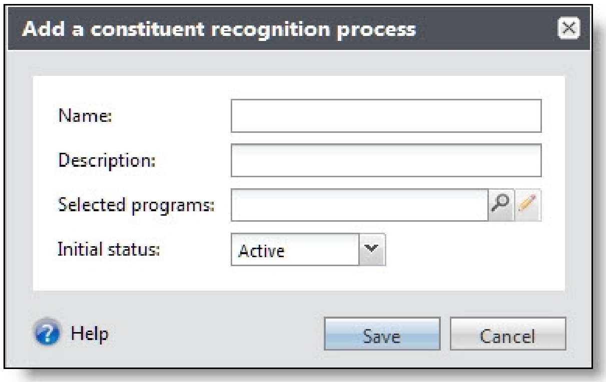
To manage your constituent recognition processes, from *Constituents*, click **Constituent recognition processes**. The Constituent Recognition Processes page appears. For each process, you can view its name and the selection of recognition programs it includes.




### Add constituent recognition process

1. From *Constituents*, click **Constituent recognition processes**. The Constituent Recognition Processes page appears.

2. Under **Constituent recognition processes**, click **Add**. The Add constituent recognition process screen appears.



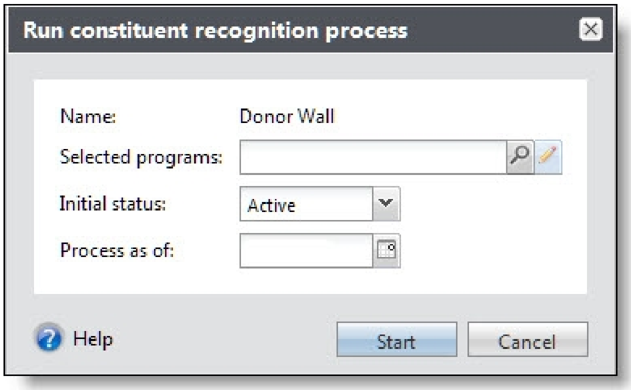

3. Enter a name and description to help identify the process.
4. To use the process to assign levels for only specific recognition programs, in the **Selected programs** field, search for the selection of programs to include. You can also create a new Recognition Program query if the one you want does not exist.
5. In the **Initial status** field, select whether the recognition programs assigned to constituents from the process are considered active or pending. You should set this field to "Active." If you set the field to "Pending" and run the process, any constituents who qualify will be assigned recognition programs and levels with a status of "Pending." You would have to manually change these statuses on each constituent.
6. Click **Save**. You return to the Constituent Recognition Processes page.

## Run a constituent recognition process

After you add or edit the constituent recognition process, you run the process to assign recognition programs and levels to constituents. When you run this process, the program calculates the sum of all qualifying recognition credit amounts for a constituent to assign the highest recognition level the constituent has achieved for that date.

***Note:*** After you run a recognition process runs, if you re-run it, it will only “recalculate” recognition levels if new revenue/recognition credits have been added for a constituent.

1. From *Constituents*, click **Constituent recognition processes**. The Constituent Recognition Processes page appears. Select the process and click **Start process**. The Run constituent recognition process screen appears. The items on this screen are the same as the Add a constituent recognition process screen.




2. To use the process to assign levels for only specific recognition programs, in the **Selected programs** field, search for and select the selection of programs to include.
3. In the **Initial status** field, select whether the recognition programs assigned to constituents from the process are considered active or pending. You should set this field to "Active." If you set the field to "Pending" and run the process, any constituents who qualify will be assigned recognition programs and levels with a status of "Pending." You would have to manually change these statuses on each constituent.
4. To assign recognition programs and levels to constituents as of a specific date, select the date to use. You can enter the current date if you want to count recognition credits added for constituents today.
5. Click **Start**. After the process completes, you can view the process status information on the process page.

# Tribute Information



A constituent tribute is a form of constituent recognition. With tributes, you can indicate to recognize a donation to your organization in relation, or tribute, to someone else. Examples of tributes include In memory of, In honor of, In recognition of, or On behalf of. You can associate each revenue record with one or multiple tributes.

On the Tributes page, you can view the tributes in your database. To access this page, select **Constituents**, **Tributes** from the navigation bar. Under **Tributes**, you can view and manage constituent tributes. For each tribute in the grid, you can view its text, tributee, creation date, active status, default designation, and associated sites.

To help find a specific tribute, you can filter the tributes that appear. On the action bar, select the criteria of the relationship to view and click **Apply**. You can select to view only tributes of a specific type or those created within a specific time frame. You can also select whether to display inactive tributes in the grid. To remove the filter criteria and view all active tributes in the grid, click **Reset** on the action bar.

From the grid, you can add and manage tributes and select to view additional information about a tribute or the constituent recognized by a tribute. From the Tributes page, you can also perform tasks to search for or manage tributes in your database.

# Add Tributes

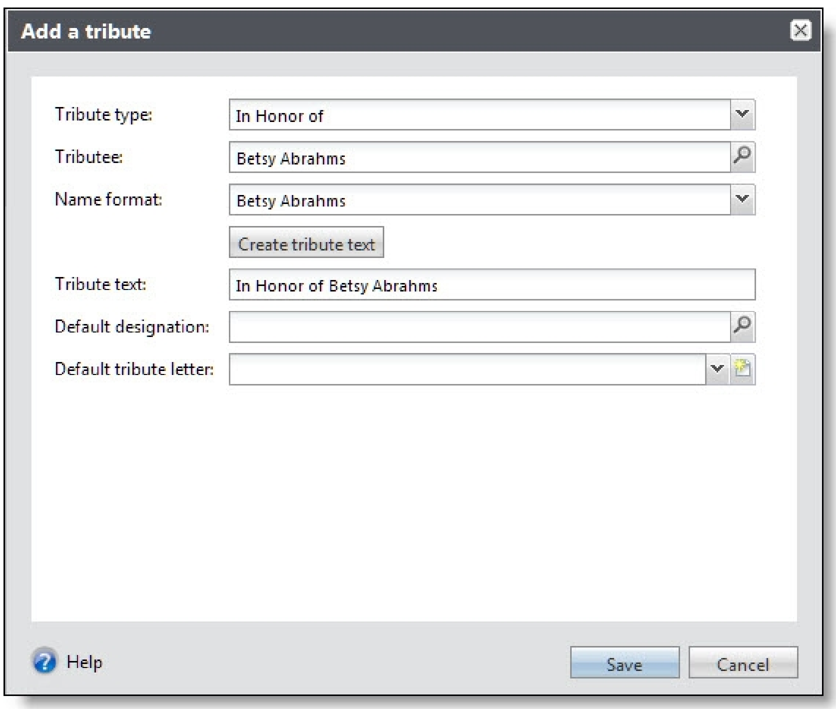
From the constituent record, you can add a tribute for a constituent.

## Add a tribute

1. From *Constituents*, click **Tributes**. The Tributes page appears.

***Tip:*** You can also add a tribute for a constituent from the Tributes tab of a constituent record. For information about the Tributes tab, see Tributes on page 216.

2. Under **Tributes**, click **Add** on the action bar. The Add a tribute screen appears.




3. Select the type of tribute to add, such as "In honor of."
4. In the **Tributee** field, search for and select the constituent to recognize with the tribute.

***Tip:*** You do not have to select a tributee. For example, if you add the tribute in memory of an individual related to the selected constituent, you do not need to create a new constituent record for the deceased individual. When you add a tribute from the Tributes tab of a constituent record, the constituent's name automatically appears in the **Tributee** field.

5. In the **Name format** field, select the name format to use to address the selected tributee.

6. In the **Tribute text** field, enter the message to use with the tribute. To use the selected tribute type, tributee, and name format to automatically generate the message, click **Create tribute text**.
7. In the **Default designation** field, click the binoculars and use the Designation Search screen to select the designation to which to apply revenue received through the tribute.
8. In the **Default tribute letter** field, select the tribute letter to send to the tributee when your organization receives revenue through the tribute. If you do not select a tributee, you cannot select a default letter.
9. Under **Sites**, select one or more sites to associate with this tribute.

   When you associate a site with a tribute, the association is used for filtering purposes only. On the Tributes page, you can use the **Sites** filter to view tributes associated with specific sites. This is useful when you work with large amounts of tributes.
10. Click **Save**. You return to the Tributes page.

# Add a Tribute Screen

The table below explains the items on the Add a tribute screen. For information about how to access this screen, see Add Tributes on page 301.

| Screen Item | Description |
|---|---|
| **Tribute type** | Select the type of tribute to add, such as In honor of, In memory of, or In recognition of. |
| **Tributee** | Search for and select the constituent to recognize with the tribute. For information about the search screen, see Constituent Search on page 61.<br><br>When you add a tribute from the Tributes tab of a constituent record, the constituent’s name automatically appears in this field. |
| **Name format** | Select the name format to use to address the selected tributee. |
| **Tribute text** | Enter the message to use to recognize the tributee with the tribute. To automatically generate the message based on the selected tribute type, tributee, and name format, click **Create tribute text**. |
| **Default designation** | Search for and select the designation to which to automatically apply revenue received through the tribute. |
| **Default tribute letter** | Select the tribute letter to send to the tributee when your organization receives revenue through the tribute. You can select a tribute letter only if you have selected a tributee. |
| **Sites** | Select one or more sites to associate with this tribute.<br><br>When you associate a site with a tribute, the association is used for filtering purposes only. On the Tributes page, you can use the **Sites** filter to view tributes associated with specific sites. This is useful when you work with large amounts of tributes. |

# Edit a Tribute

After you add a tribute for a constituent, you can edit it as necessary.

### Edit a tribute

1. From *Constituents*, click **Tributes**. The Tributes page appears.

> ***Tip:*** To edit a tribute from its record, click **Edit tribute** under **Tasks**. For information about the tribute record, see Tribute Record on page 305.

> ***Note:*** You can edit a tribute for a specific constituent from the Tributes tab of a constituent record. For information about the Tributes tab, see Tributes on page 216.

2. Under **Tributes**, select the tribute to edit.
3. On the action bar, click **Edit**. The Edit tribute screen appears. The items on this screen are the same as the Add a tribute screen. For information about the items on this screen, see Add a Tribute Screen on page 302.
4. Edit the information as necessary.
5. Click **Save**. You return to the Tributes tab.

# Delete a Tribute

After you add a constituent tribute, you can delete it from the Tributes page before users apply gifts to the tribute.

> ***Tip:*** If gifts are applied to the tribute and you no longer want to use the tribute, you can make the tribute inactive. For more information, see Mark a Tribute as Inactive or Active on page 304.

### Delete a constituent tribute

1. From *Constituents*, click **Tributes**. The Tributes page appears.

> ***Tip:*** To delete a tribute from its record, click **Delete** under **Tasks**. For information about the tribute record, see Tribute Record on page 305.

2. Under **Tributes**, select the tribute to delete.
3. On the action bar, click **Delete**. A message appears to ask whether to delete the tribute.
4. Click **Yes**. You return to the Tributes page. The tribute is deleted from the database. Under **Tributes**, the tribute no longer appears.

# Mark a Tribute as Inactive or Active

To retain information about a tribute that your organization no longer uses, you can make the tribute inactive in the database. Inactive tributes remain on the Tributes page for record keeping purposes, but users cannot apply future donations to the tribute. The program automatically excludes inactive tributes from tribute searches. To search for an inactive tribute, you must first select **Include inactive tributes** on the Tribute Search screen.

After you mark a tribute as inactive, you can mark it as active again if necessary.

### Mark a tribute as inactive

1. From *Constituents*, click **Tributes**. The Tributes page appears.

> ***Tip:*** To mark a tribute as inactive from its record, click **Mark inactive** under **Tasks**. For information about the tribute record, see Tribute Record on page 305.

2. Under **Tributes**, select the tribute to mark as inactive.
3. On the action bar, click **Mark inactive**. A message appears to ask whether to mark the tribute as inactive.
4. Click **Yes**. You return to the Tributes page. To view the tribute in the grid, select **Include inactive tributes** on the action bar.

### Mark a tribute as active

1. From *Constituents*, click **Tributes**. The Tributes page appears.

> ***Tip:*** To mark a tribute as active from its record, click **Mark active** under **Tasks**. For information about the tribute record, see Tribute Record on page 305.

2. On the action bar, select **Include inactive tributes** and click **Apply**.
3. Under **Tributes**, select the tribute to mark as active.
4. On the action bar, click **Mark active**. A message appears to ask whether to mark the tribute as active.
5. Click **Yes**. You return to the Tributes page. In the **Is active** column, a check mark appears for the tribute.

# Go to Tributee

From the Tributes page, you can access the constituent record of a tributee. The tributee is the constituent recognized by the tribute.

Under **Tributes**, click the name of the tributee. The tributee's constituent record appears. To view or manage the tributes for the constituent, select the Tributes tab.

For information about the items on the record, see Constituent Records on page 51.

# Tribute Record

To view information about the acknowledgees or revenue associated with a tribute on the Tributes page, you can access its record. To view the record of a tribute from the Tributes page, click the tribute text under **Tributes**.

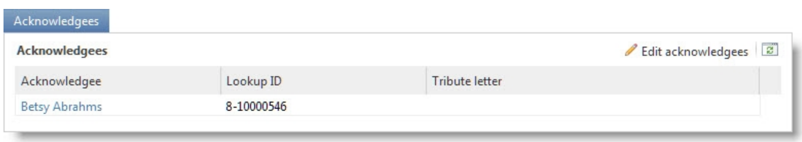
***Tip:*** To find a specific tribute, you can perform a tribute search. From the Tributes page, select Tasks, Search for a tributes from the menu bar or click Search for a tribute under Tasks on the explorer bar. For information about how to search for a tribute, see Tribute Search on page 306.

From the tribute record, you can perform tasks to manage the tribute.

To help you navigate through the tribute information, the record has multiple tabs.

## Acknowledgees

Acknowledgees are the constituents to notify when a donation is made toward the tribute. To view or manage the acknowledgees of a tribute, select the Acknowledgees tab of the tribute record.




Under **Acknowledgees**, you can view the constituents to notify when your organization receives revenue toward the tribute and the tribute letter to use with each. From the grid, you can view and manage the acknowledgees associated with the tribute.

## Edit Acknowledgees

From the Acknowledgees tab of a tribute record, you can add or edit acknowledgees associated with the tribute.

### Edit acknowledgees for a tribute

1. Open the record of the tribute with the acknowledgees to edit. For information about how to open a tribute record, see Tribute Search on page 306.
2. Select the Acknowledgees tab.
3. Under **Acknowledgees**, click **Edit acknowledgees** on the action bar. The Edit acknowledgees screen appears.
4. In the **Acknowledgee** column, select each constituent to receive a letter when your organization receives a donation toward the tribute. To search for a constituent, click the binoculars and use the Constituent Search screen.
5. In the **Tribute letter** column, select the letter to send each acknowledgee.

To add an acknowledgement letter, click the letter icon. For information about how to add a letter, see Add Tribute Letters on page 308.

6. Click **Save**. You return to the Acknowledgees tab. Under **Acknowledgees**, the selected constituents appear.

## Go to an Acknowledgee

From the Acknowledgees tab of a tribute record, you can access the constituent record of an acknowledgee. The acknowledgee is a constituent to notify when your organization receives a donation toward the tribute.

To access an acknowledgee's constituent record from the Acknowledgees tab, click the name of the acknowledgee under **Acknowledgees**. For information about the items on the record, see Constituent Records on page 51.

## Revenue

To view the revenue received toward a tribute, select the Revenue tab of the tribute record.

Under **Revenue**, you can view the revenue transactions received toward the tribute. For each transaction, you can view the constituent and date of the transaction, its tribute amount, and its transaction type.

From the grid, you can access the record of a transaction to view additional information. For information about how to access the record of a tribute transaction, see Go to Transaction on page 306.

## Go to Transaction

From the Revenue tab of a tribute record, you can access the revenue record of a donation made toward the tribute. Under **Revenue**, click the tribute amount. The revenue record appears.

For information about revenue records, see the *Revenue Guide*.

# Tribute Search

After you add a tribute to the database, you can use the Tribute Search screen to access the tribute's record. When you search for a tribute record, you can make the search broad or specific, depending on the criteria you select. To get the results you need, we recommend you be selective in your search criteria and use detailed information such as tribute text, tributee, or acknowledgee.

### Search for a tribute

1. From the Tribute Search screen, enter the search criteria to use, such as tribute text and tributee information, to find the tribute record. To match the search criteria exactly as entered, select **Match all criteria exactly**.

***Tip:*** If you do not select **Match all criteria exactly**, you can use "wildcard" characters in place of parts of search criteria, such as if you are unsure of an exact spelling. To replace a group of characters, use an asterisk (*) or percent sign (%). To replace a single character, use a question mark (?) or an underscore (_). For example, to return all tributes that have tributees with a last name that ends with "son" such as Johnson and Williamson, enter "*son" or "%son" as the tributee last name. To find the last name of Smith or Smyth, enter "Sm?th" or "Sm_th".

2. Click **Search**. The program searches the database for tributes that match the search criteria entered. Under **Results**, the tributes that match the criteria appear. Depending on the search criteria you enter, the search may return one tribute or many.
3. Under **Results**, click the text of the tribute to open.

   The tribute record opens. For information about the items on the record, see Tribute Record on page 305.

# Tribute Search Screen

The table below explains the items on the Tribute Search screen. For information about how to access this screen, see Tribute Search on page 306.

| Screen Item | Description |
|---|---|
| **Tribute text** | Enter the message used to recognize the tributee with the tribute. |
| **Tribute type** | Select the type of tribute to find, such as In honor of, In memory of, or In recognition of. |
| **Date created** | Select the date your organization added the tribute to the database. |
| **Default designation** | Enter the designation to which revenue received through the tribute automatically applies. |
| **Site** | If the tribute is associated with a specific site, select the site here. |
| **Tributee last/org name** and **Tributee first name** | Enter the name of the constituent recognized by the tribute. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith. |
| **Acknowledgee last/org name** and **Acknowledgee first name** | Enter the name of the constituent notified when your organization receives a donation toward the tribute. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all names that begin with Sm appear, such as Smith and Smalls. Names are not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith. |
| **Include inactive tributes** | To include tributes marked as inactive in the search, select this checkbox. |
| **Match all criteria exactly** | To use search criteria exactly as entered, select this checkbox.<br>If you select this checkbox, wildcard characters do not work and instead return only the literal character. Similarly, beginning characters return only those characters entered. |

| Screen Item | Description |
| --- | --- |
| **Results** | When you click **Search**, this grid displays the tributes that match the search criteria entered. For searches that return more than 100 tributes, only the first 100 appear. |

# Add Tribute Letters

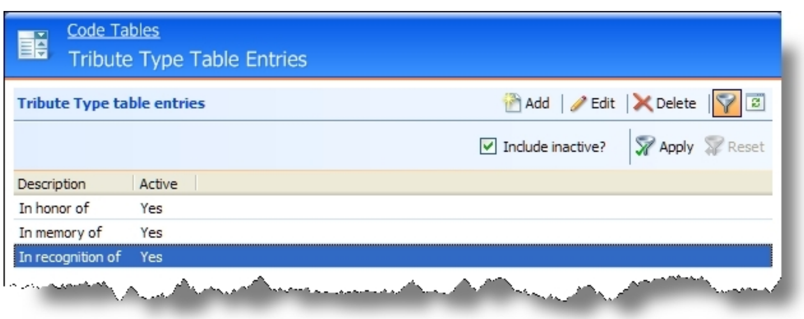
Your organization sends a tribute letter to acknowledgees when you receive donations toward a tribute. For example, when your organization receives a donation toward the tribute In memory of Alan Mendes, you send a tribute letter to his wife, Alice, to let her know Mary Frank sent a donation in memory of Alan. For information about acknowledgees, see Acknowledgees on page 305.

To add a tribute letter from the Tributes page, click **Add tribute letter** under **Tasks**. The Add a tribute letter screen appears. On this screen, you can enter a unique name and description to identify the letter and select the Microsoft *Word* template and output format to use to generate the letter.

You can also add a tribute letter from the Acknowledgements page in *Revenue*. For information about how to add a tribute acknowledgement letter, see the *Communications Guide*.

# Manage Tribute Types

From the Tributes page, to manage the types of tributes your organization uses, such as In honor of, In memory of, or In recognition of, click **Manage tribute types** under **Tasks**. The Tribute Type Table Entries page appears.




Under **Tribute Type table entries**, the options in the code table for the **Tribute type** field appear. For each table entry, you can view whether the tribute type is active. To display inactive tribute types in the field, on the action bar, click **Filter**, select **Include inactive?**, and click **Apply**. From the grid, you can add and manage the code table entries for the **Tribute type** field.

For information about how to manage code table entries, see the *Administration Guide*.

# Constituent Reports



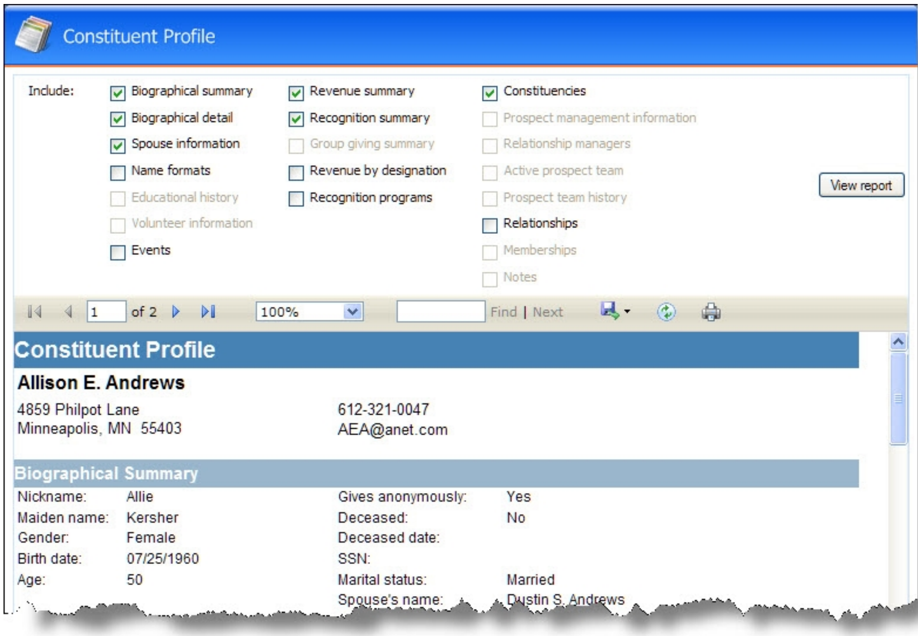
## Constituent Profile Report

In a constituent profile report, you can select to include an assortment of detailed constituent information. A constituent profile can be helpful, such as to present a constituent summary to your board members or solicitors. To access the report from a constituent's record, click **Constituent profile** under **Reports**.

***Note:*** To access the report from *Constituents*, click **Constituent profile report** under **Reports**. To access a constituent profile report from *Analysis*, click **Constituent reports** and then **Constituent profile**. The Constituent Search screen appears so you can search for the constituent to profile.

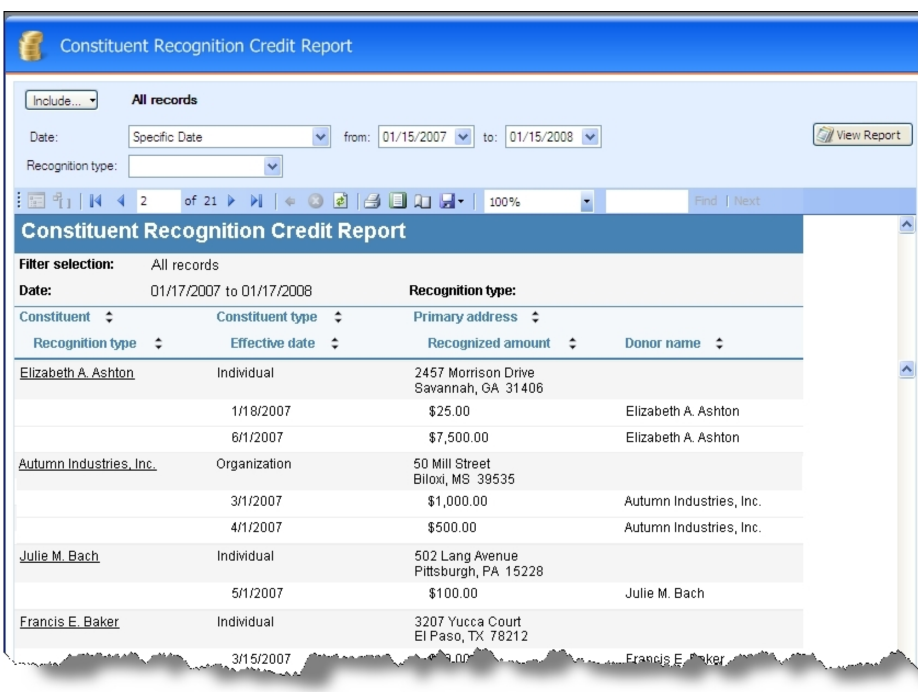
On the Constituent Profile page, You can select the information about the constituent to include in the report. The information available depends on the type of constituent selected, such as individual or household. You can also select which categories of information about the constituent to include in the profile. To update the report with the selected information, click **View report**.

***Note:*** You cannot select a checkbox if its information category does not appear on the constituent record.



# Constituent Recognition Credit Report

To view recognition credit information for a selected group of constituents, generate the Constituent Recognition Credit Report. For example, to prepare to create the Honor Roll list at the end of the month, run the Constituent Recognition Credit Report to correctly recognize constituents for the recognition type of Honor Roll.



For each constituent in the report with recognition credit, the Constituent Recognition Credit Report displays the constituent name, constituent type, and primary address. The report also displays a sub-report that lists the recognition type, the effective date, and the recognition amount associated with recognition credit. The sub-report also displays the donor name for the revenue associated with recognition credit.

When you run a Constituent Recognition Credit Report, filter by specific selections to narrow the data that appears in the report.

Filters for the Constituent Recognition Credit Report include:

- **Include** - To filter by a specific constituent query selection based on criteria you defined, click the binoculars to search for the selection. Depending on your security rights and system role, you can add and edit queries.
- **Date** - To narrow the results, select the date range for which to view constituent recognition credit information.
- **from** - To narrow the report by a specific date range, click the calendar icon to select a start date.
- **to** - To narrow the report by a specific date range, click the calendar icon to select an end date.
- **Recognition type** - Select a recognition credit type to filter the report. For example, select Spouse.

When you generate a report, you can use the toolbar buttons to modify how you view the report. The toolbar buttons are common to all reports.

For more information about the report toolbar, see the *General Features Guide*.

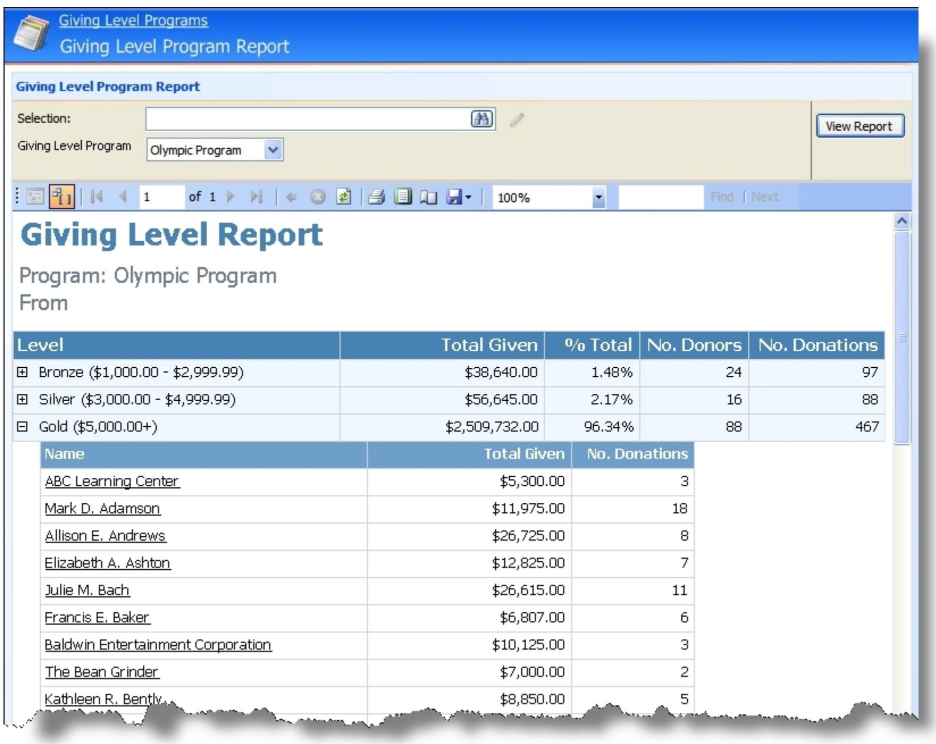
### View the Constituent recognition credit report

1. From *Constituents*, click **Constituent recognition credit** under **Reports**. The Constituent Recognition Credit Report screen appears.
2. Click **Include** and select the records to include. Select All records, Selected records, or Specific record” If you select Selected records or Specific record, in the field that appears,search for the constituent selection or record to include.
3. Enter the date range to filter the report.
   - In the **Date** field, select a date for which to view constituent recognition credit information.
   - If, in the **Date** field, you select Specific date, select the date for which to view constituent recognition credit information. The report will display information only for the selected date.
4. In the **Recognition type** field, select a recognition type to filter the report. For example, select Spouse.
5. Click **View Report**. The program generates and displays the report.
6. To close the report and return to the previous page, on the shell toolbar, click the **Back** button.

# Giving Level Program Report

With the Giving Level Program report, you can view which constituents are members of each level of a giving level program. The report shows summary revenue information about the levels within a program and information about each constituent who reaches a level in a giving program. The report shows the total given, percent of total, number of donors, and number of donations for each level, and the total given and number of donations for each constituent within a level. To view a detailed giving summary of a constituent, click the name of the constituent in the report.

To access the report from *Constituents*, click **Giving level programs** under **Configuration**. On the Giving Level Program page, select the program to include in the report and click **View Report** on the action bar. The Giving Level Program Report screen appears.




In the **Selection** field, search for and select a constituent selection to include in the report. To include all constituents in the report, leave this field blank. To run the report, click **View Report**.

You can print the report or export it in several different formats.

# Tribute Reports

From the Tributes page, you can generate constituent tribute reports. A constituent tribute is a form of constituent recognition. With tributes, you can indicate whether to recognize a donation to your organization in relation (or tribute) to someone else.

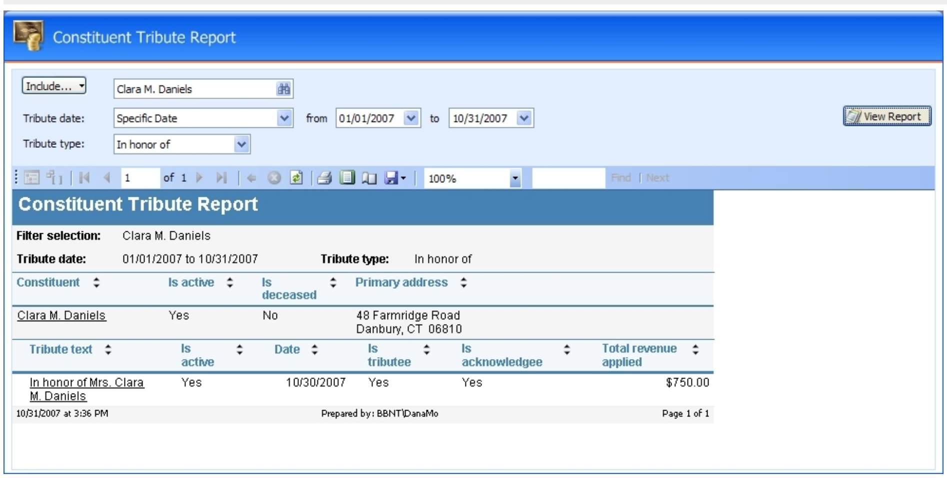
# Constituent Tributes Report

The Constituent Tributes Report displays the tributes associated with selected constituents. For each constituent, the name appears and whether the constituent is active or deceased. The report also displays the constituent's primary address and all tributes associated with the constituent. For each tribute, the report provides the tribute text, whether the tribute is active, the date the tribute was created, how the constituent is associated with the tribute (tributee or acknowledgee), and the total revenue applied to the tribute. From the report, you can click a constituent's name to go to the constituent record and click the tribute text to go to the tribute record.

The Constituent Tributes Report displays the tributes associated with selected constituents. For each constituent, the name appears and whether the constituent is active or deceased. The report also displays the constituent's primary address and all tributes associated with the constituent. For each tribute, the report provides the tribute text, whether the tribute is active, the date the tribute was created, how the constituent is associated with the tribute (tributee or acknowledgee), the total revenue applied to the tribute, and the gross amount of the tribute including Gift Aid. From the report, you can click a constituent's name to go to the constituent record and click the tribute text to go to the tribute record.

To access the report from the Tributes page or *Constituents*, click **Constituent tributes** under **Reports**. The Constituent Tributes report page appears. At the top of the report, click **Include** and select whether to include all records, selected records, or a specific record. If you select Selected records, click search for and select the selection of records to use. If you select Specific record, search for and select the constituent. You can then select a tribute date and tribute type. After you define the parameters for the report, click **View report**.

***Note:*** To access the Constituent Tributes Report from *Analysis*, click **Tribute reports** and then **Constituent tributes**.




You can print the report or save the report as an *Excel* spreadsheet or *Acrobat* PDF file.

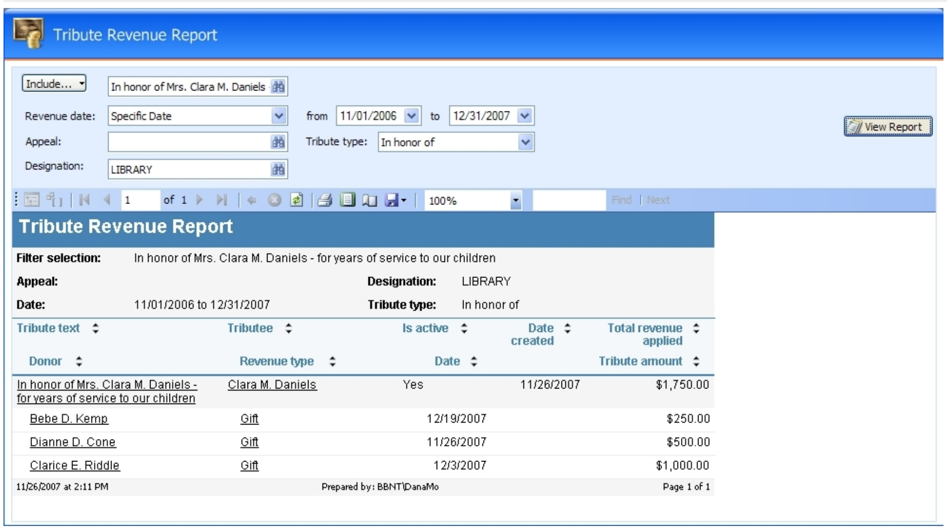
# Tribute Revenue Report

The Tribute Revenue Report displays the revenue records applied to selected tributes. For each tribute, the tribute text, tributee, whether the tribute is active or inactive, the date created, and the total revenue applied to the tribute appears. For each tribute, the report displays the donors for the tribute, revenue types, revenue dates, and revenue amounts. From the report, you can click a constituent's name to go to the constituent record and click the revenue type to go to the revenue record.

The Tribute Revenue Report displays the revenue records applied to selected tributes. For each tribute, the tribute text, tributee, whether the tribute is active or inactive, the date created, and the total revenue applied to the tribute with and without Gift Aid appears. For each tribute, the report displays the donors for the tribute, revenue types, revenue dates, and revenue amounts with and without Gift Aid. From the report, you can click a constituent's name to go to the constituent record and click the revenue type to go to the revenue record.

To access the report from the Tributes page, click **Tribute revenue** under **Reports**. The Tribute Revenue report page appears.

***Note:*** To access the Tribute Revenue Report from *Analysis*, click **Tribute reports** and then **Tribute revenue**.




At the top of the report, click **Include** and select whether to include all records, selected records, or a specific record. If you select Selected records, search for and select the selection of tributes to include. If you select Specific record, search for and select the tribute. You can then select a date or date range and type of the tribute or appeal and designation of the revenue transaction. Once you define the parameters for the report, click **View report**.

You can print the report or save the report as an *Excel* spreadsheet or *Acrobat* PDF file.

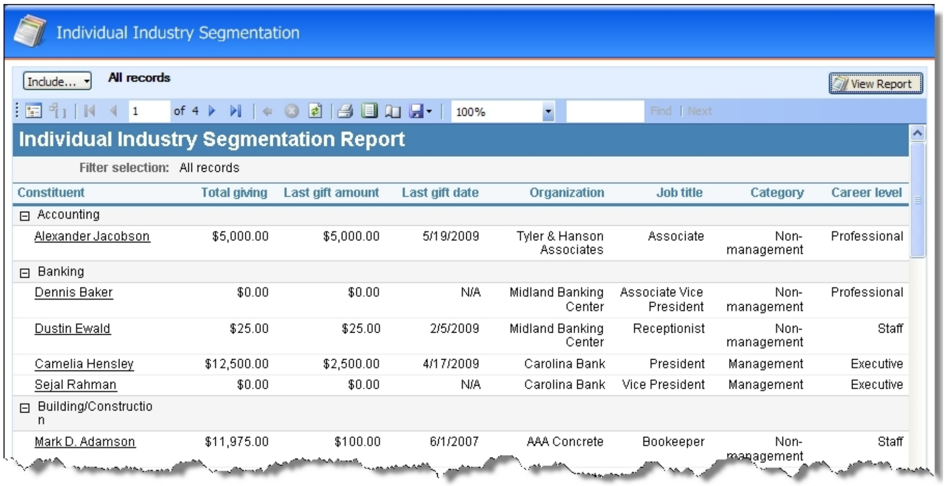
# Industry Analysis Reports

The industry segmentation reports provide basic information about individuals or organizations grouped by industry, along with giving totals. You can use these reports to analyze giving trends by industry and target future solicitations.

## Individual Industry Segmentation Report

The Individual industry segmentation report provides basic information about constituents grouped by industry. The report includes a breakdown for comparison of constituent giving and organization. A constituent could show up under different industries in the report, if the individual is associated with multiple organizations. You can use this report to analyze giving trends by industry and target future solicitations.

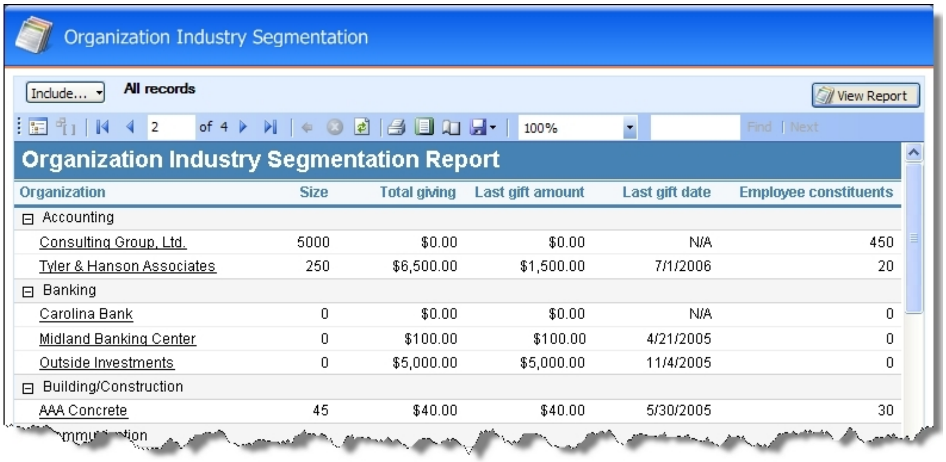
From *Analysis*, click **Constituent reports**, then **Individual industry segmentation**. Select whether to include all individuals or only selected individuals, and click **View Report**.




## Organization Industry Segmentation Report

The Organization industry segmentation report provides basic information about organizations grouped by industry. The report includes a breakdown for comparison of organization size, giving, and number of employees who are also constituents. You can use this report to analyze giving trends by industry and target future solicitations.

From *Analysis*, click **Constituent reports**, then **Industry segmentation**. Select whether to include all organizations or only selected organizations, and click **View Report**.



Organization Industry Segmentation

Include... All records View Report

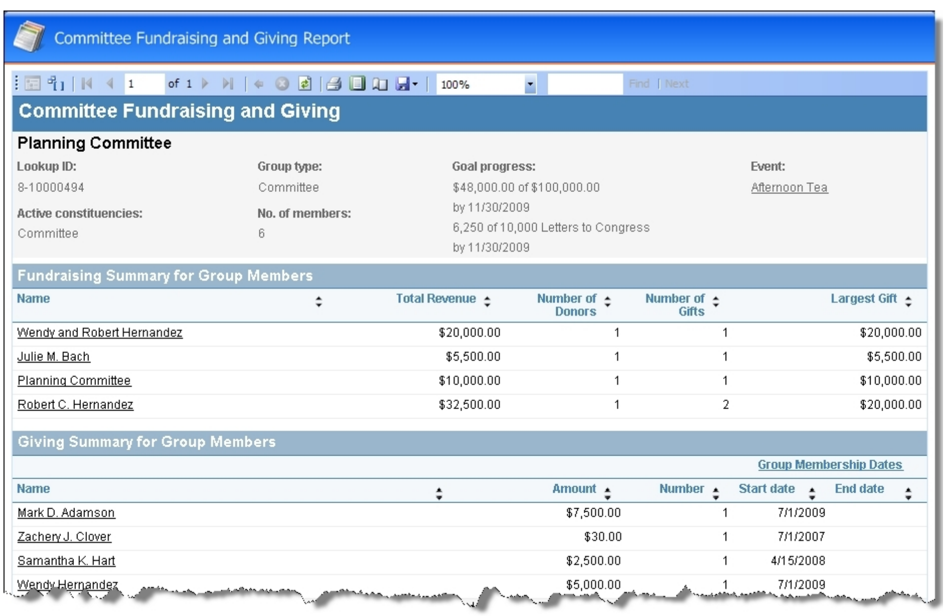
Organization Industry Segmentation Report

| Organization | Size | Total giving | Last gift amount | Last gift date | Employee constituents |
|---|---|---|---|---|---|
| Accounting | | | | | |
| Consulting Group, Ltd. | 5000 | $0.00 | $0.00 | N/A | 450 |
| Tyler & Hanson Associates | 250 | $6,500.00 | $1,500.00 | 7/1/2006 | 20 |
| Banking | | | | | |
| Carolina Bank | 0 | $0.00 | $0.00 | N/A | 0 |
| Midland Banking Center | 0 | $100.00 | $100.00 | 4/21/2005 | 0 |
| Outside Investments | 0 | $5,000.00 | $5,000.00 | 11/4/2005 | 0 |
| Building/Construction | | | | | |
| AAA Concrete | 45 | $40.00 | $40.00 | 5/30/2005 | 30 |

# Committee Fundraising and Giving Report

The Committee fundraising and giving report is available for committees that can solicit revenue. It provides revenue information about how much the committee has raised as a solicitor along with how much they have given themselves (as individual committee members and as the committee). In the giving summary for the group members, additional information about the group members is shown, such as group membership dates. If the committee has goals or helps coordinate events, that information is also included.

From the record of a group with a constituency of Committee, click **Committee** under **View as**. The Committee page appears. On this page, click **Committee fundraising and giving report** under **Reports**.



Committee Fundraising and Giving Report

Committee Fundraising and Giving

Planning Committee

Lookup ID: 8-10000494
Group type: Committee
Goal progress: $48,000.00 of $100,000.00 by 11/30/2009; 6,250 of 10,000 Letters to Congress by 11/30/2009
Event: Afternoon Tea
Active constituencies: Committee
No. of members: 6

Fundraising Summary for Group Members

| Name | Total Revenue | Number of Donors | Number of Gifts | Largest Gift |
|---|---|---|---|---|
| Wendy and Robert Hernandez | $20,000.00 | 1 | 1 | $20,000.00 |
| Julie M. Bach | $5,500.00 | 1 | 1 | $5,500.00 |
| Planning Committee | $10,000.00 | 1 | 1 | $10,000.00 |
| Robert C. Hernandez | $32,500.00 | 1 | 2 | $20,000.00 |

Giving Summary for Group Members

Group Membership Dates

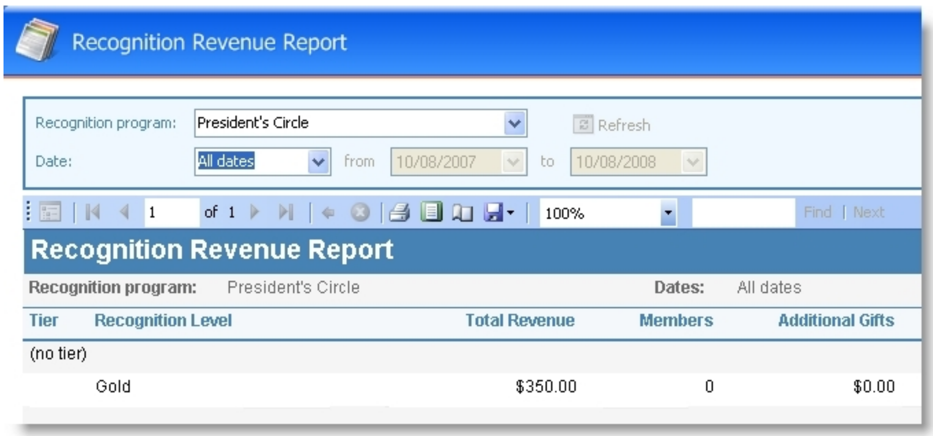
| Name | Amount | Number | Start date | End date |
|---|---|---|---|---|
| Mark D. Adamson | $7,500.00 | 1 | 7/1/2009 | |
| Zachery J. Clover | $30.00 | 1 | 7/1/2007 | |
| Samantha K. Hart | $2,500.00 | 1 | 4/15/2008 | |
| Wendy Hernandez | $5,000.00 | 1 | 7/1/2009 | |

# Recognition Program Reports

Recognition program reports analyze data about recognition programs. Use the Recognition Revenue Report to display revenue transaction details and use the Recognition Count Report to generate a list of constituents.

## Recognition Revenue Report

The Recognition Revenue Report displays revenue transaction details for a recognition program in a time frame that you specify.




### View the Recognition Revenue Report

1. From *Constituents*, click **Recognition Programs**. The Recognition Programs page appears.
2. Under **Reports**, click **Recognition revenue**. The Recognition Revenue report screen appears.
3. Select a recognition program to include in the report.
4. In the **Date** field, select a time period for the recognition revenue information.

   If you select Specific date, enter the date range for the report.
5. Click **View report**.

### View the Recognition Statistics Comparison Report

1. On the Recognition Programs page, click **Recognition Statistics Comparison Report** under **Reports**. The Recognition Statistics Comparison Report screen appears.
2. In the **This period** field, select a current time period for the report.

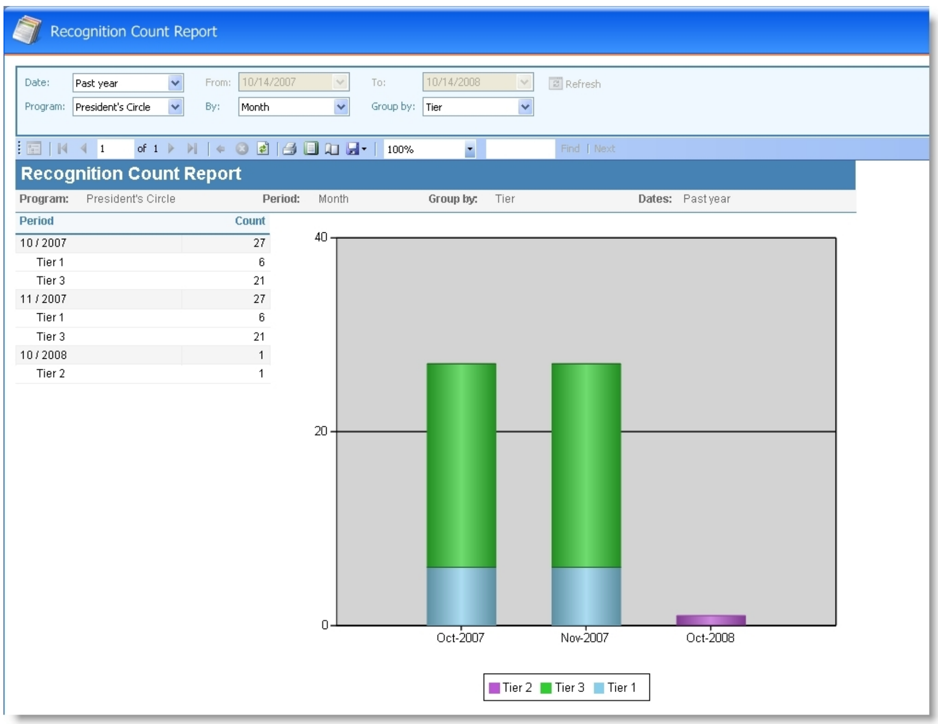
   If you select “Specific date,” enter a start date and end date for the current time period.
3. In the **Last period** field, select a past time period for the report.

   If you select “Specific date,” enter a start date and end date for the past time period.

4. In the **Program** field, select a program to use for the report results.
5. In the **Group by** field, select to group report results by channel or activity. You must select a group option.
6. To refresh the data and view the report, click **Refresh**.
7. To close the report and return to the previous page, on the shell toolbar, click the **Back** button.

# Recognition Count Report

To generate a list of constituents in a recognition program, generate the Recognition Count Report. You can select to group report results by recognition type or level.




## View the Recognition Count Report

1. On the Recognition Programs page, click **Recognition count**under **Reports**. The Recognition Count report screen appears.
2. In the **Date** field, select a time period for the recognition count.

   If you select Specific date, enter a date range for the report.
3. Select the recognition program to include in the report.
4. In the **By** field, select whether to calculate the count by a monthly, quarterly, or yearly interval.
5. In the **Group by** field, select whether to display the results by recognition type or level.
6. To refresh the data and view the report, click **View report**.