

# The Raiser's Edge™

MatchFinder Guide

## **013112**

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# What Is In This Guide?

In the *MatchFinder Guide*, you learn how to use the *MatchFinder* database to find information about matching gift companies. The *MatchFinder* database is separate from the database in *The Raiser's Edge*. However, you can link records in the *MatchFinder* database with records in *The Raiser's Edge* database. In this guide, you learn about how to access the *MatchFinder* information from *The Raiser's Edge* and how to use the cross-reference tool. You can also learn about the following:

- “Navigating in MatchFinder” on page 7
- “Understanding MatchFinder” on page 19
- “Download and Update the MatchFinder Database” on page 22
- “Matching Gift Company Record” on page 26
- “Cross-Reference MatchFinder Records with The Raiser's Edge” on page 32
- “Create and Break Links with MatchFinder Records” on page 46

## How Do I Use These Guides?

*The Raiser's Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

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

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

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

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

# Introduction to MatchFinder



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*MatchFinder* is a database, separate from the database in ***The Raiser's Edge***, that includes information about matching gift companies. When you use *MatchFinder*, you can link records in its database with records in your database in ***The Raiser's Edge***.

*MatchFinder* enables you to track matching gift companies. For example, many employees are not aware their employer matches gifts. If they are aware of a company's matching gift program, they may still be unfamiliar with the guidelines and restrictions of the program. In addition, nonprofit organizations may be unfamiliar with which companies match gifts. *MatchFinder* provides detailed information about matching gift programs for a variety of companies. Once you locate information about matching gift programs specific to the records in your database, you can view the matching gift information and create and break links between records in **The Raiser's Edge** and *MatchFinder*.

Blackbaud has incorporated information into one *MatchFinder* database that you can use with **The Raiser's Edge**. You can search this database to find important matching gift information about a company, cross-reference *MatchFinder* records with records in your database in **The Raiser's Edge**, and create and break links between these records. Blackbaud routinely provides an updated *MatchFinder* database. For more information about how to update the *MatchFinder* database, see "Download and Update the MatchFinder Database" on page 22.

You can access *MatchFinder* information through **The Raiser's Edge**. When you access *MatchFinder* information through the **The Raiser's Edge**, you can work with matching gift company information through organization constituent records and organization relationship records, view a company's guidelines, and cross-reference company records with those in **The Raiser's Edge**. You can also view *MatchFinder* information for a constituent from the Matching Gifts screen of the Matching Gifts tab of the gift record. For more information about the different ways to access *MatchFinder* information, see "Navigating in MatchFinder" on page 7.

## Frequently Used Terms

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

**Alias.** An alias is a secondary identification or acronym used to identify a constituent. For example, an alias for Computer Information Center may be CIC. You can use aliases to search for and access a *MatchFinder* record.

**Cross-reference.** A cross-reference is a direction from one place to pertinent information in another place. By cross-referencing, *MatchFinder* matches records stored in the *MatchFinder* database with constituent records in **The Raiser's Edge**. To match a company stored in **The Raiser's Edge** database with a matching gift company record stored in the *MatchFinder* database, you can use the Cross-Reference Tool. Once the cross-reference is complete, you can use the results report to compare information about the companies, so you can ensure your database stays up-to-date.

**MatchFinder Database.** A database is a group of records and fields that contain your constituent information. The *MatchFinder* database stores important information about matching gift companies. You can integrate the *MatchFinder* database to work with **The Raiser's Edge**. Blackbaud routinely updates the *MatchFinder* database.

**Matching gift company.** A matching gift company is a business that matches gifts given to an organization. The *MatchFinder* database stores information about matching gift companies. Each matching gift company record in *MatchFinder* consists of a series of tabs. Each tab stores specific information such as a contact name, an address, employee restrictions, special terms, and subsidiaries. You cannot edit the company record.

**Matching gift factor.** A matching gift factor is the rate at which the company matches gifts. For example, if the company gives \$2 for every \$1 donated by its employees, the matching gift factor is two.

**Organization constituent record.** An organization constituent is a business that contributes time, money, and resources in support of your organization. In **The Raiser's Edge**, you can access linked *MatchFinder* information through an organization record. From the Org 1 tab of an organization record, click the **MatchFinder** button. Once you click this button, you can view current matching gift company information, break a link that the organization has with a matching gift company, or create a new link.

**Organization relationship record.** An organization relationship is a business, club, church, agency, and any other organization that has some sort of association with a constituent. Organization relationships can have their own constituent records or exist solely on the original constituents' records. If the organization is a constituent in your database, the two records are linked together and, if the relationship is reciprocated, appear on each others' respective Relationships tabs.

You can access *MatchFinder* information through all organization relationship records in ***The Raiser's Edge***. From the General 2 tab of an organization relationship record, click the **MatchFinder** button. Once you click this button, you can view matching gift company information associated with the constituent. You can also break the link the constituent has with the matching gift company or create a new link. Organization relationships exist for both organization constituents and individual constituents in your database.

**Subsidiary.** A subsidiary is a company that is connected to or owned by a parent company. For example, Engineering Service Center is a matching gift company within the *MatchFinder* database. Engineering Service Center owns Engineering Technology Center, or ETC. On the Subsidiaries tab of the Engineering Service Center company record, ETC is listed because it is considered a subsidiary. If an organization in ***The Raiser's Edge*** is a subsidiary of a company in the *MatchFinder* database, you can link the organization to the matching gift company record of its parent.

## MatchFinder Security

Your user rights are assigned in *Security*. To access *Security*, click **Admin** on the Raiser's Edge bar. The security settings affect only your ability to access the *MatchFinder* functions. You also need the applicable rights in ***The Raiser's Edge*** for the functions you perform with the information from the *MatchFinder* database. For example, to link *MatchFinder* records to your records in ***The Raiser's Edge***, you must have security privileges in *Records*.

**Note:** For more information about security and security groups, see the *Configuration and Security Guide*.

Security access for *MatchFinder* can be assigned to specific areas, so you may have access to some areas but not others. For example, a security group may have access to update the *MatchFinder* database but not to launch the Cross-Reference Tool.

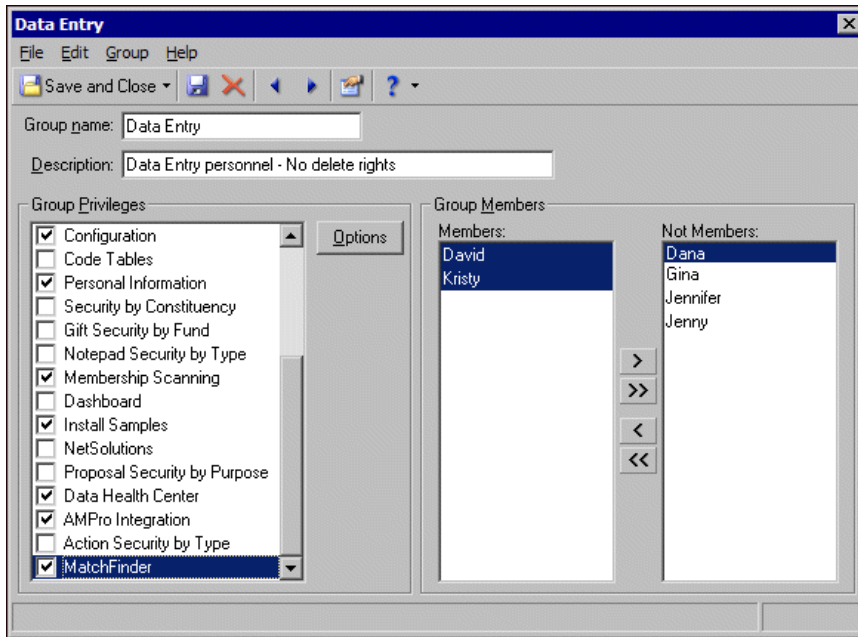
If, on the group screen, the **MatchFinder** checkbox is marked in the **Group Privileges** box, the members of the group have access to *MatchFinder*.

### ► Assign security privileges for MatchFinder

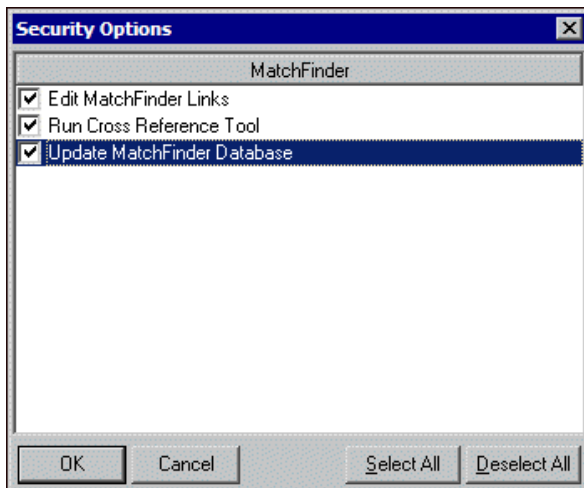
This procedure explains how to assign security settings specific to *MatchFinder*.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Security**. The Security page appears.
3. Under groups in the **Security** tree view list on the left, select the security group to assign access to *MatchFinder*. For example, to assign the data entry personnel access to *MatchFinder*, select the Data Entry group.

4. On the action bar, click **Open**. The selected group screen appears.



5. In the **Group Privileges** box, mark **MatchFinder**. When you mark this checkbox, the **Options** button is enabled.
6. Click **Options**. The Security Options screen appears.



**Warning:** To run the cross-reference tool, the user must have rights to **Edit MatchFinder Links** and **Run Cross-Reference Tool**.

7. For each area of *MatchFinder* you want the members of the security group to have access, mark the corresponding checkbox.
- To enable members of the security group to create and break links between records in the *MatchFinder* database and the database in *The Raisers' Edge*, mark **Edit MatchFinder Links**.
  - To enable members of the security group to use the cross-reference tool, mark **Run Cross-Reference Tool**. To run the cross-reference tool, the user must also have rights to **Edit MatchFinder Links**.
  - To enable members of the security group to run the process to update the *MatchFinder* database, mark **Update MatchFinder Database**.



To mark all three checkboxes, click **Select All**. To unmark all three checkboxes, click **Deselect All**.

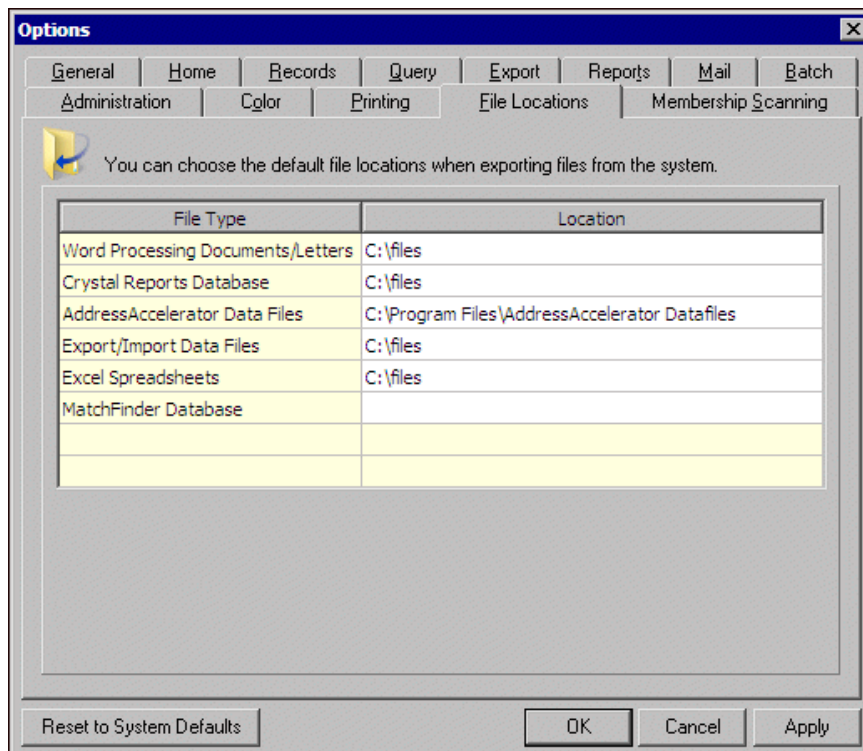
8. Click **OK**. You return to the selected group screen.
9. Click **Save and Close**. You return to the Security page of *Administration*.

## MatchFinder User Options

*MatchFinder* is a database, separate from the database in *The Raiser's Edge*, that includes information about matching gift companies. When you use *MatchFinder*, you can search this database to find important matching gift information about a company, cross-reference *MatchFinder* records with records in your database in *The Raiser's Edge*, and create and break links between these records. To access this database, you must enter its location on the File Locations tab of User Options.

### ► Set the file location of the MatchFinder database

1. From the menu bar, select **Tools, User Options**. The Options screen appears.
2. Select the File Locations tab.



**Warning:** If your organization has multiple *MatchFinder* users or plans to add *MatchFinder* users in the future, we recommend you access the database from a shared network location. A shared database helps ensure the *MatchFinder* information you use is accurate and current.

3. When you use *MatchFinder*, "MatchFinder Database" appears in the **File Type** column. In the **Location** column, enter the path to the location to download and access the *MatchFinder* database.  
You can download the *MatchFinder* database to a workstation or a network location.
4. Click **OK**. You return to the previous screen.

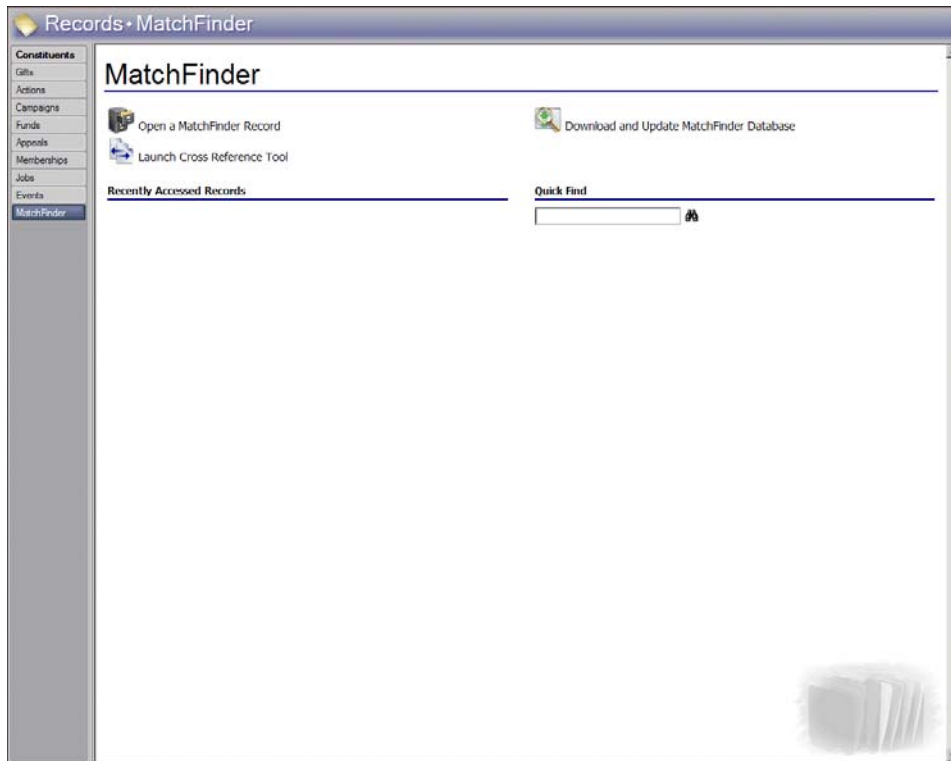
# MatchFinder Alphabetization Guidelines

When *MatchFinder* alphabetizes companies and their subsidiaries, it uses guidelines. You can use these guidelines to help you understand how *MatchFinder* organizes records. Understanding this can help you search for records quickly and efficiently.

- *MatchFinder* alphabetizes company names that begin with “The” by the second piece of information in their name. For example, The ABC Corporation is alphabetized by ABC.
- Typically, *MatchFinder* alphabetizes names that can be identified as proper names by the last name. For example, S.C. Johnson & Sons Inc. is alphabetized by Johnson, rather than SC.
- When *MatchFinder* alphabetizes companies, it ignores spaces and periods. For example, a company listed as C.D.C. Industries or C D C Industries is alphabetized by where it falls within the alphabet. In this case, by CDC.
- Company names that begin with one letter and then a hyphen (W-G, Inc.), a slash (A/C), or an ampersand (A&G) fall at the beginning of that letter’s section in the alphabet. This occurs regardless of spacing. For example, W & G and W&P both fall at the beginning of the Ws. Names with ampersands appear first, hyphens second, and slashes third.
- If the name begins with a whole word and then an ampersand, such as California & Hawaii, the organization lists alphabetically by the first name at the beginning of companies with that word. For example, California & Hawaii, California National. If the name begins with a whole word, followed by a dash or hyphen, then the name falls after other companies with the same name. For example, Federal Homes, Federal-Mogul, Federal/Danville.
- Names with two words appear before names with one word that begin with the same word. For example, Health Care Partners appears before Healthcare International.
- Company names that begin with numbers, such as 21st Century Insurance, fall at the very beginning of the alphabet, before the As.
- Company names that begin with St., such as St. Paul Insurance, are alphabetized by “St” rather than Saint.
- Company names that begin with US appear at the beginning of the list of names beginning with Us, followed by company names beginning with USA. This occurs regardless of periods or spacing, such as U.S. or U S.

# Navigating in MatchFinder

In *The Raiser's Edge*, you can navigate through *MatchFinder* information from the MatchFinder page. To access the MatchFinder page, click **Records** on the Raiser's Edge bar and then click **MatchFinder**. The MatchFinder page appears. From the MatchFinder page, you can open *MatchFinder* records, update the *MatchFinder* database, and launch the Cross-Reference Tool. When you open *MatchFinder* records from the MatchFinder page, you access the actual records stored in the *MatchFinder* database, not *Raiser's Edge* records. Remember, *MatchFinder* is a database of records separate from *The Raiser's Edge*. While you can integrate the two to work together, the actual *MatchFinder* records are separate.



The MatchFinder page also contains a list of recently accessed *MatchFinder* records. To open a record listed in the **Recently Accessed Records** frame, double-click on its name in the list.

To quickly find a record, in the **Quick Find** field, enter the name of the *MatchFinder* record and click the binoculars to display a list of records that match your entry.

In *The Raiser's Edge*, you can also work with *MatchFinder* information from an organization record or organization relationship record. Using *MatchFinder*, you can link records and look up matching gift companies. The **MatchFinder** button appears on the Org 1 tab of an organization constituent record and the General 2 tab of all organization relationship records. When you click the **MatchFinder** button on your constituent records, you can begin to work with matching gift company information.

You can also view matching gift information for a constituent from the Matching Gifts screen of the Matching Gifts tab of a gift record.

## Access MatchFinder Information

In *The Raiser's Edge*, you can access a *MatchFinder* record from the MatchFinder page. When you access a record from the MatchFinder page, you can only view the record. You cannot create or break links from the MatchFinder page.

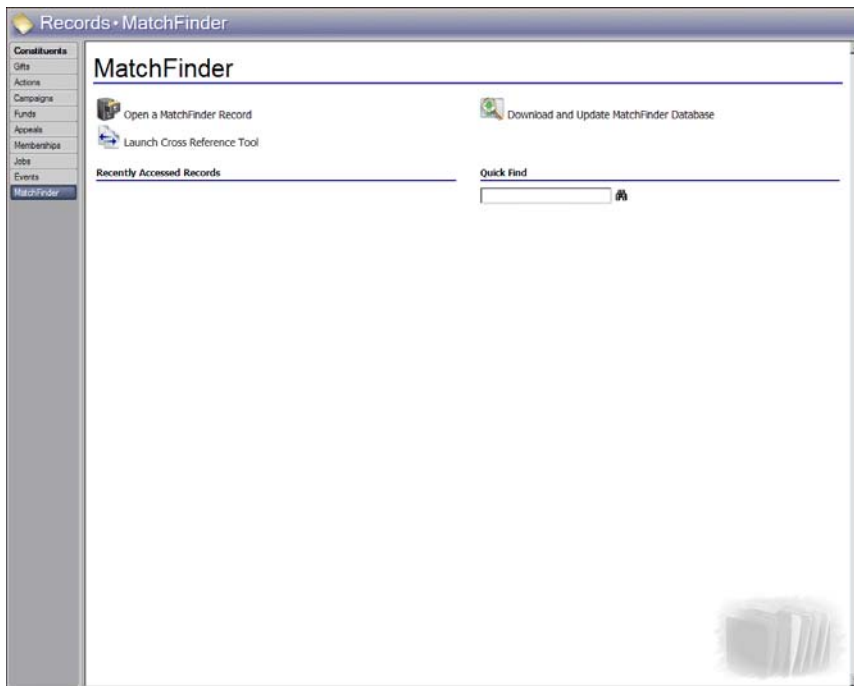
You can work with MatchFinder information from the Org 1 tab of an organization record or from the General 2 tab of an organization relationship record. When you access these records, a **MatchFinder** button appears.

When you click the **MatchFinder** button, if no link exists for the record, the Open a Company screen appears so you can enter criteria to search for a specific matching gift company to link. This criteria can include the company's name, city, or state. To search for the record, in the **Company Name** field, enter all or part of the company's name. For example, if you enter "Smith" in the **Company Name** field, *MatchFinder* lists any company whose name or alias begins with Smith. A company alias is secondary identification or an acronym used to identify a constituent. For example, the alias for Premier Consulting Agency can be PCA. PCA is the secondary identification for the name of the company.

When you click the **MatchFinder** button on a constituent record that is already linked to a *MatchFinder* record, the matching gift company information linked to the record appears. For more information about how *MatchFinder* searches for records, see "MatchFinder Alphabetization Guidelines" on page 6.

► **Open a MatchFinder record from the MatchFinder page**

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



- Click **Open a MatchFinder Record**. If the constituent record is not linked to a *MatchFinder* record, the Open screen for *MatchFinder* records appears.

**Note:** If you do not know the correct spelling or number, enter the first few letters or characters in the **Find Matchfinder Records that meet these criteria** fields. For more information about how *MatchFinder* searches for records, see “MatchFinder Alphabetization Guidelines” on page 6.

- In the **Find Matchfinder Records that meet these criteria** frame, enter the criteria to use to search for the *MatchFinder* record. This criteria can include the company’s name, city, and state. You can also specify whether the results must match the entered criteria exactly.
- Click **Find Now**. If the search criteria entered matches an organization in the database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find multiple records.

Company Name	Industry	Location	Parent
Ladd Transportation	Manufacturing	Greensboro, NC	La-Z-Boy Inc
La-Z-Boy Inc (Ladd F...	Manufacturing	Greensboro, NC	

- In the grid, select the *MatchFinder* record to open.

7. Click **Open**. The *MatchFinder* matching gift company record appears. You cannot edit or change the company record.

The screenshot shows a web application window titled "La-Z-Boy Inc (as of 07/12/2005)". The window has a menu bar with "File", "Edit", "View", "Record", "Favorites", and "Help". Below the menu bar is a toolbar with icons for "Close", navigation (back, forward, home, search), and a help icon. The main content area has tabs for "Company", "Employee Restrictions", "Nonprofit Eligibility", "Rules", "Subsidiaries", and "Special Terms". The "Company" tab is active, displaying the following information:

Company name: La-Z-Boy Inc	
Alias: Ladd Furniture	
Fund/Foundation:	Industry: Manufacturing
Fiscal year ends:	Status: Active
Web address: www.lazyboy.com	Date: 2003

Below this information are two sections: "Company Address" and "Contact".

<b>Company Address</b> Address: 4620 Grandover Pkwy Box 26777 City: Greensboro State: NC ZIP: 27417-6777 Country: Phone: 336-315-4265 Ext: Fax: 336-315-4380		<b>Contact</b> Last name: Sims First name: Bernita Middle name: Title/Suffix: Ms. Position: HR Generalist II E-mail: bernita.sims@la-z-boy.com
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In some cases, the *MatchFinder* company record you select to open may not have the same name of the *MatchFinder* company record that actually appears. This is because one company may have multiple subsidiaries. Subsidiaries are companies that are owned by or are a part of another company. For example, you select to open the *MatchFinder* record for Ladd Furniture. The *MatchFinder* record for La-Z-Boy Inc appears. The same matching gift company information exists for both companies because Ladd Furniture is listed as a subsidiary of La-Z-Boy on the Subsidiaries tab.

8. To close the *MatchFinder* company record, click **Close** on the toolbar.

► **Open MatchFinder information from an organization constituent record**

1. On the Raiser's Edge bar, click **Records**. For more information about working with constituent records, see the *Constituent Data Entry Guide*.
2. Click **Constituents**. The Constituents page appears.

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

4. In the **Find Constituents that meet these criteria** frame, enter the criteria to use to search for the organization. This criteria can include the organization's name, ID, membership ID, bank account number, address lines, city, state, ZIP, class of format, and credit card number.

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

5. Click **Find Now**. If the search criteria entered matches an organization in the database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find multiple records.



6. In the grid, select the organization whose record you want to open.
7. Click **Open**. The organization record appears.

The screenshot shows the 'Ladd Furniture' software window. The menu bar includes File, Edit, View, Constituent, Letter, Favorites, Tools, and Help. The toolbar contains various icons for file operations and navigation. The main window is divided into several sections. At the top, there are tabs for 'Org 1', 'Org 2', 'Addresses', 'Relationships', 'Appeals', 'Notes', 'Gifts', 'Attributes', 'Media', and 'Actions'. Below these tabs, the 'Org Name' field is set to 'Ladd Furniture'. The 'Constituent ID' field is set to '238'. The 'Preferred Address : Business' section includes fields for 'Country' (United States), 'Address lines', 'City', 'State', 'ZIP', and 'DPC'. There is a 'Phones/Email/Links' table with columns for 'D...', 'Type', 'Number/Email A...', and 'Shared?'. The 'Solicit code' field is empty. On the right side, there is a 'Matching Gift Information' section with a 'Factor' field, a 'Fiscal year starts' field, and a 'Matching Gift Limits' table. The table has columns for 'Minimum' and 'Maximum' and rows for 'Per gift', 'Annual per donor', and 'Total per donor'. Below this is a 'Notes' section. At the bottom right, there are checkboxes for 'Is inactive', 'Is a solicitor', 'Gives anonymously', 'Has no valid addresses', and 'Requests no email'. There are also 'MatchFinder' and 'Bank' buttons.

8. Select the Org 1 tab.
9. Click **MatchFinder**.
  - If the constituent record is linked to a *MatchFinder* record, the *MatchFinder* matching gift company record appears. Go to step 10.
  - If the constituent record is not linked to a *MatchFinder* record, the Open screen appears so you can search *MatchFinder* for the matching gift company.

The screenshot shows the 'Open' dialog box. The 'Find:' dropdown menu is set to 'MatchFinder Records'. The main area of the dialog is empty. On the right side, there are buttons for 'Open', 'Cancel', 'Options', 'Find Now', 'New Search', and 'Expand Results'. At the bottom, there is a section titled 'Find MatchFinder Records that meet these criteria:'. It includes a 'Company name' field set to 'Ladd Furniture', a 'City' field, and a 'State' field. There is a checkbox for 'Exact match only'.



- a. In the **Find MatchFinder Records that meet this criteria** frame, organization information from *The Raiser's Edge* appears. Decide which criteria to use to search for the company and enter the information in the appropriate criteria fields. The criteria can include the company's name, city, and state.
- b. Click **Find Now**.

If the search criteria entered matches a company in the *MatchFinder* database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find multiple records.

- c. In the grid, select the company whose record you want to open and click **Open**. The *MatchFinder* matching gift company record appears.
10. You cannot edit or change the *MatchFinder* matching gift company record. For information about the items on the *MatchFinder* matching gift company record, see "Matching Gift Company Record" on page 26.

In some cases, the *MatchFinder* company record you select to open may not have the same name of the *MatchFinder* company record that actually appears. This is because one company may have multiple subsidiaries. Subsidiaries are companies that are owned by or are a part of another company. For example, you select to open the *MatchFinder* record for Ladd Furniture. The *MatchFinder* record for La-Z-Boy Inc appears. The same matching gift company information exists for both companies because Ladd Furniture is listed as a subsidiary of La-Z-Boy on the Subsidiaries tab.

From the *MatchFinder* company record, you can link the matching gift company information to the organization constituent record in *The Raiser's Edge*. For more information about how to view and link a *MatchFinder* record to company information in *The Raiser's Edge*, see "Create and Break Links with MatchFinder Records" on page 46.

#### ► Open MatchFinder information from an organization relationship record

You can work with organization relationship information from the General 2 tab of all organization relationship records for a constituent. For individual constituent records, you can access the primary organization relationship record (primary business) from the **Business** button on the Bio 1 tab. To access all other organization relationship records for individual and organization constituent records, select the Relationships tab and then select **Organizations** from the list on the left. Whether you work with organization relationship records for an organization or an individual, you can work with *MatchFinder* information to ensure your constituent records stay updated.

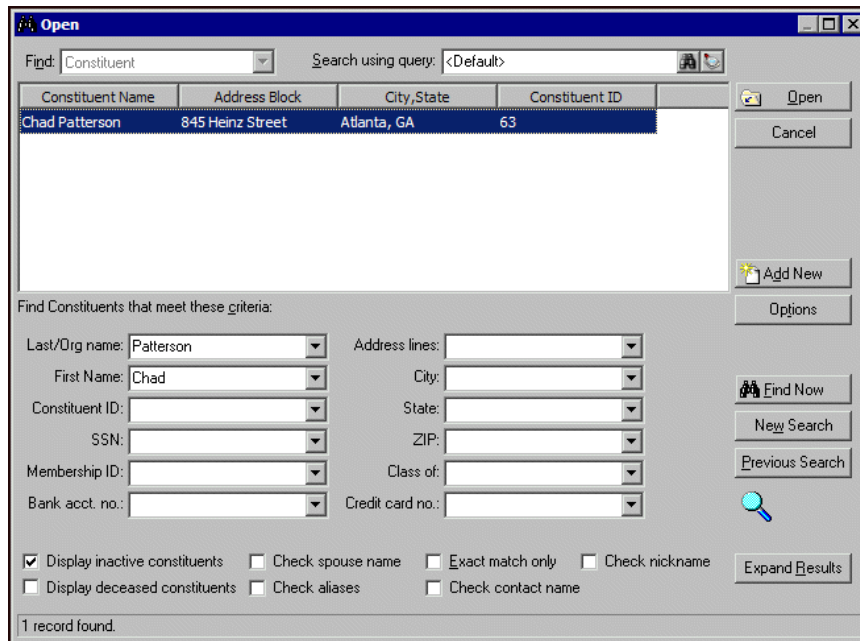
For more information about relationship records, see the Relationships chapter of the *Constituent Data Entry Guide*.

1. On the Raiser's Edge bar, click **Records**.
2. Click **Constituents**. The Constituents page appears.
3. Click **Open a Constituent**. The Open screen appears.

4. In the **Find Constituents that meet these criteria** frame, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. This criteria can include the constituent's first or last name, constituent identification number, social security number, address, city, state, zip, membership identification number, and class of format.

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

- Click **Find Now**. If the search criteria you entered matches a constituent in the database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find multiple records.



Find: Constituent Search using query: <Default>

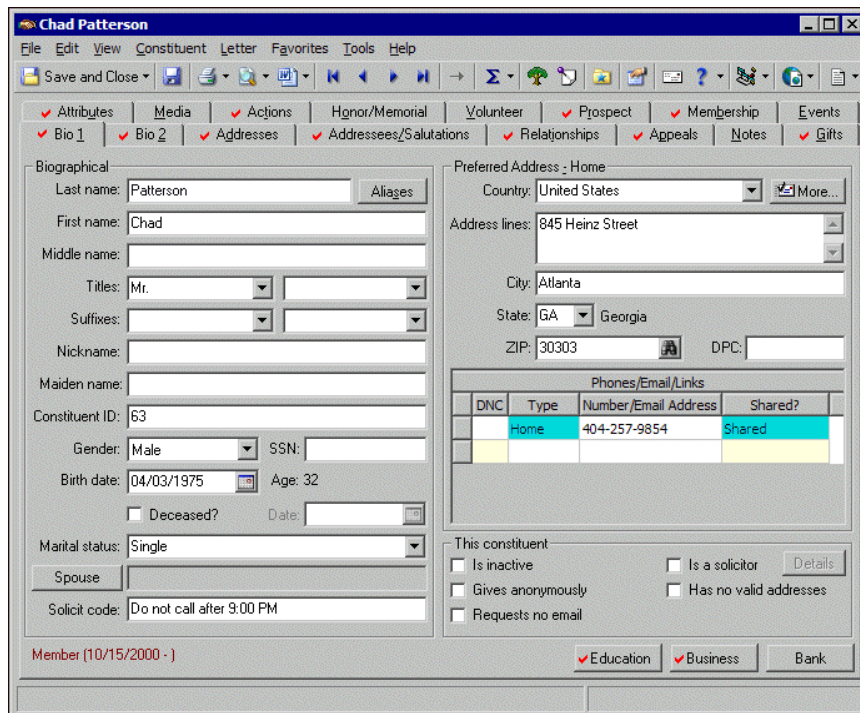
Constituent Name	Address Block	City, State	Constituent ID
Chad Patterson	845 Heinz Street	Atlanta, GA	63

Find Constituents that meet these criteria:

Last/Org name: Patterson Address lines: City: State: ZIP: Class of: Credit card no.:  
 First Name: Chad  
 Constituent ID: SSN: Membership ID: Bank acct. no.:  
☒ Display inactive constituents ☐ Check spouse name ☐ Exact match only ☐ Check nickname  
☐ Display deceased constituents ☐ Check aliases ☐ Check contact name

1 record found.

- In the grid, highlight the constituent whose record you want to open.
- Click **Open**. The constituent record appears.



Chad Patterson

File Edit View Constituent Letter Favorites Tools Help

Save and Close

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

Biographical

Last name: Patterson Aliases  
 First name: Chad  
 Middle name:   
 Titles: Mr.   
 Suffixes:   
 Nickname:   
 Maiden name:   
 Constituent ID: 63  
 Gender: Male SSN:   
 Birth date: 04/03/1975 Age: 32  
☐ Deceased? Date:   
 Marital status: Single  
 Spouse:   
 Solicit code: Do not call after 9:00 PM

Preferred Address: Home

Country: United States More...  
 Address lines: 845 Heinz Street  
 City: Atlanta  
 State: GA Georgia  
 ZIP: 30303 DPC:

Phones/Email/Links

DNC	Type	Number/Email Address	Shared?
	Home	404-257-9854	Shared

This constituent

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

Member (10/15/2000 -)

Education Business Bank

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

**Organization Relationship for Chad Patterson**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

Org name: Ladd Furniture ID: 238 Aliases

Country: United States More... Industry: Position: Marketing Assistant Print? Profession: Manufacturing Income: \$40,000 - \$49,999 Relationship: Employer Reciprocal: Employee Date from: 2000 to

Address lines: City: State: ZIP: DPC:

☐ Print organization name with address

Phones/Email/Links			
DNC	Type	Number/Email Ad...	Shared?
	Business	404-977-1002	Not Shared
	Fax	404-633-7404	Not Shared

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

☒ Employee ☒ Primary business information

☐ Contact ☐ Do not mail to this contact

Contact type:

Press F7 for table lookup, F8 for AddressAccelerator

9. Select the General 2 tab.

**Organization Relationship for Chad Patterson**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

☒ Ladd Furniture matches gifts from Chad Patterson

Matching Gift Information

Factor: Fiscal year starts:

Matching Gift Limits		
	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

Notes:

☐ Automatically soft credit this organization for Gifts

MatchFinder

Press F7 to zoom

10. Click **MatchFinder**.

- If the constituent record is linked to a *MatchFinder* record, the *MatchFinder* matching gift company record appears. Go to step 11.
- If the constituent record is not linked to a *MatchFinder* record, the Open screen appears so you can search *MatchFinder* for the matching gift company.

- In the **Find MatchFinder Records that meet this criteria** frame, organization information from *The Raiser's Edge* appears. Decide which criteria to use to search for the company and enter the information in the appropriate criteria fields. The criteria can include the company's name, city, and state.
- Click **Find Now**.

Company Name	Industry	Location	Parent
La-Z-Boy Inc (Ladd F...	Manufacturing	Greensboro, NC	

If the search criteria entered matches a company in the *MatchFinder* database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find multiple records.

- In the grid, select the company whose record you want to open and click **Open**. The *MatchFinder* matching gift company record appears.



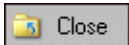
11. You cannot edit or change the company record. For information about the items on the *MatchFinder* matching gift company record, see “Matching Gift Company Record” on page 26.

In some cases, the *MatchFinder* company record you select to open may not have the same name of the *MatchFinder* company record that actually appears. This is because one company may have multiple subsidiaries. Subsidiaries are companies that are owned by or are a part of another company. For example, you select to open the *MatchFinder* record for Ladd Furniture. The *MatchFinder* record for La-Z-Boy Inc appears. The same matching gift company information exists for both companies because Ladd Furniture is listed as a subsidiary of La-Z-Boy on the Subsidiaries tab.

From the *MatchFinder* company record, you can link the matching gift company information to the organization constituent record in ***The Raiser's Edge***. For more information about how to view and link a *MatchFinder* record to company information in ***The Raiser's Edge***, see “Create and Break Links with MatchFinder Records” on page 46.

## MatchFinder Record Toolbar

The toolbar contains buttons that represent common commands for a *MatchFinder* matching gift company record. When you access a *MatchFinder* company record through the MatchFinder page, these buttons appear on the toolbar. Buttons on the toolbar may occasionally appear in a lighter shade. The lighter shade designates that a specific button is disabled for the type of task you are performing. To save time when you use functions on a *MatchFinder* company record, use these buttons as alternatives to menu commands.



Close

Close a company record



Go to the first *MatchFinder* company record



Go to the previous *MatchFinder* company record



Go to the next *MatchFinder* company record



Go to the last *MatchFinder* company record



Add a *MatchFinder* company record to favorites



View *MatchFinder* company record properties



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

## Understanding MatchFinder

*MatchFinder* is a database, separate from ***The Raiser's Edge***, that includes information about matching gift companies. When you use *MatchFinder*, you can link records in its database to records in your database in ***The Raiser's Edge***.

On a *MatchFinder* record, you can view eligibility requirements, rules and guidelines, subsidiary information, and special terms about each matching gift company's program. In addition, *MatchFinder* stores the maximum and minimum amounts a matching gift company matches, as well as the matching gift factor. Using the cross-reference tool, you can automatically link matching gift companies stored in *MatchFinder* to your records in ***The Raiser's Edge***. You can also import information about companies in the *MatchFinder* database to linked records in ***The Raiser's Edge***.

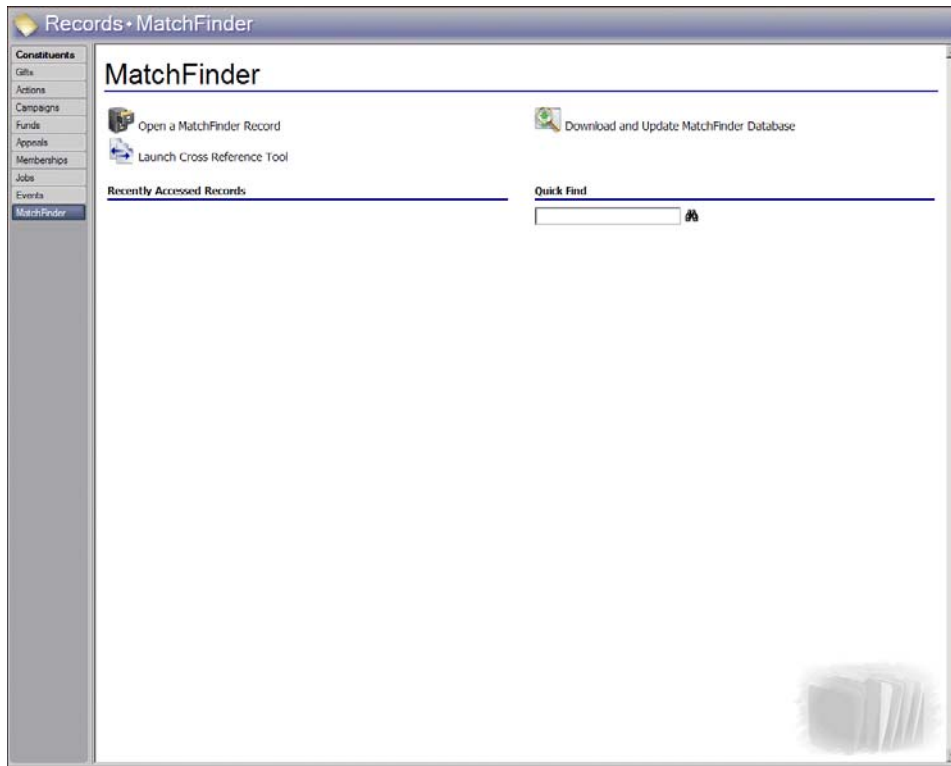
When you work with matching gift information in ***The Raiser's Edge***, the **MatchFinder** button appears on the Org 1 tab of an organization constituent record and the General 2 tab of all organization relationship records. You can access organization relationship records from the Relationships tab of all organization and individual constituent records. You can also access organization relationship information from the **Business** button of an individual constituent record's Bio 1 tab. To work with matching gift company information, click the **MatchFinder** button.

If a constituent's matching gift is linked to a *MatchFinder* record, a **MatchFinder** button also appears on the Matching Gifts screen of the Matching Gifts tab of the gift record. To view linked matching gift information for a constituent, click the **MatchFinder** button.

Through *Reports* on the Raiser's Edge bar, you can also access the *MatchFinder* Organization Summary report. This profile report displays the matching gift factor and limits of companies in the *MatchFinder* database.

## MatchFinder Page

From the MatchFinder page in *The Raiser's Edge*, you can work with *MatchFinder* company records. To access the MatchFinder page, click **Records** on the Raiser's Edge bar, and then **MatchFinder**.



From the MatchFinder page, you can open *MatchFinder* records, update the *MatchFinder* database, and launch the Cross-Reference Tool. When you open *MatchFinder* records from the MatchFinder page, you access the actual records stored in the *MatchFinder* database, not *Raiser's Edge* records. Remember, *MatchFinder* is a database of records separate from *The Raiser's Edge*. While you can integrate the two to work together, the actual *MatchFinder* records are separate.



## Organization Constituent Record

From the Org 1 tab of an organization constituent record in *The Raiser's Edge*, you can work with *MatchFinder* company records. To create and break links to *MatchFinder* records, click the **MatchFinder** button. For more information about how to create and break links from the Org 1 tab, see "Create and Break Links with MatchFinder Records" on page 46.

**Ladd Furniture**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Honor/Memorial Org 1 Org 2 Addresses Relationships Appeals Notes Gifts Attributes Media Actions

Org Name: Ladd Furniture Aliases

Constituent ID: 238

Preferred Address : Business

Country: United States More...

Address lines:

City:

State:

ZIP: DPC:

Phones/Email/Links

D...	Type	Number/Email A...	Shared?

Solicit code:

Organization matches Gifts

Matching Gift Information

Factor: Fiscal year starts:

Matching Gift Limits		
	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

Notes:

This constituent

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

MatchFinder Bank

## Organization Relationship Record

From the General 2 tab of organization relationship records in *The Raiser's Edge*, you can work with *MatchFinder* records. For organization and individual constituent records, you can work with organization relationship records from the Relationships tab of the constituent record. You can also work with organization relationship records for individual constituent records through the **Business** button on the Bio 1 tab of an constituent record. For more information about the Relationships tab, see the Relationships chapter of the *Constituent Data Entry Guide*.

**Organization Relationship for Chad Patterson**

File Edit View Relationship Help

Save and Close Undo Redo ?

General 1 General 2 Attributes/Notes

☒ Ladd Furniture matches gifts from Chad Patterson

Matching Gift Information

Factor:  Fiscal year starts:

Matching Gift Limits	
Per gift	
Annual per donor	
Total per donor	

Notes:

☐ Automatically soft credit this organization for Gifts

MatchFinder

Press F7 to zoom

Once you access an organization relationship record, to create and break links to *MatchFinder* records, click the **MatchFinder** button. For more information about creating and breaking links from the Org 1 tab, see “Create and Break Links with MatchFinder Records” on page 46.

## Download and Update the MatchFinder Database

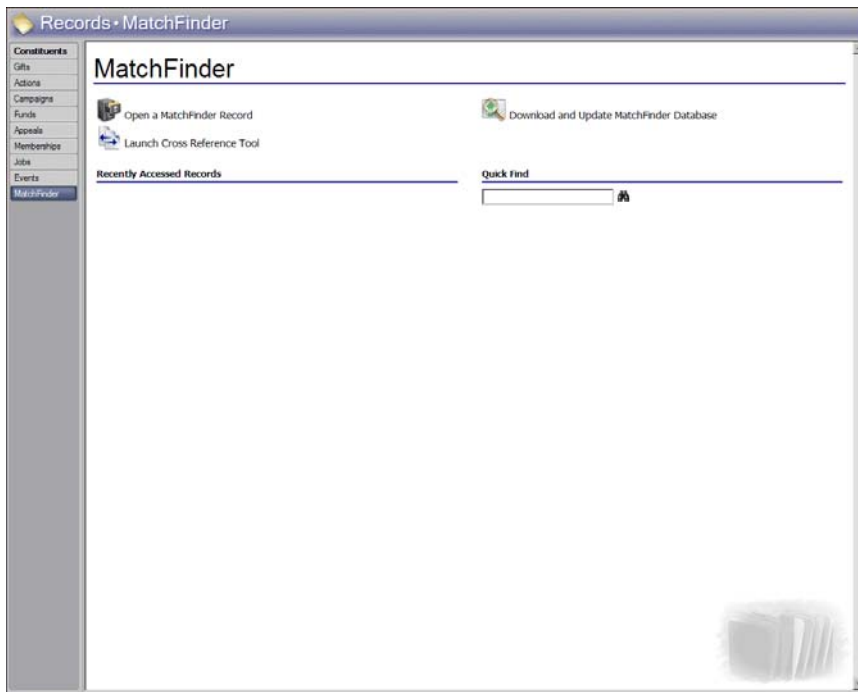
**Warning:** To download or update the *MatchFinder* database, you must have a working internet connection. If you do not have a working internet connection, you can request Blackbaud send you the database on CD.

*MatchFinder* is a database, separate from the database in *The Raiser's Edge*, that includes information about matching gift companies. When you use *MatchFinder*, you can search this database to find important matching gift information about a company, cross-reference *MatchFinder* records with records in your database in *The Raiser's Edge*, and create and break links between these records. Blackbaud routinely provides an updated *MatchFinder* database. From the MatchFinder page in *The Raiser's Edge*, you can easily download and update your *MatchFinder* database.

Before you download or update the *MatchFinder* database, we recommend you set up the file location of your *MatchFinder* database in User Options. You can update the file location as necessary. For information about how to set up the file location of your database, see “MatchFinder User Options” on page 5.

► **Download and update the MatchFinder database**

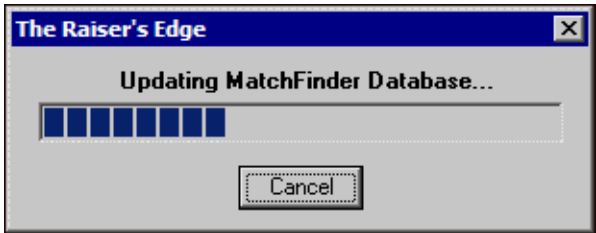
1. On the Raiser’s Edge bar, click **Records**.
2. Click **MatchFinder**. The MatchFinder page appears.



3. Click **Download and Update MatchFinder Database**. The program compares the version of the database at the location entered in User Options against the current *MatchFinder* database.
  - If your *MatchFinder* database is the same version as the current *MatchFinder* database, a message appears to inform you that your database is up-to-date. To return to the MatchFinder page, click **OK**.
  - If no file location is entered in User Options for your *MatchFinder* database, the Browse for Folder screen appears. Map to the file location for the database and click **OK**. The program downloads the *MatchFinder* database to the selected location and saves the file location in User Options.
  - If the file location entered in User Options for your *MatchFinder* database is not valid, such as it was accidentally deleted, a message appears to ask you to select another file location. Click **OK**.  
 When the Browse for Folder screen appears, map to the new file location for the database and click **OK**. The program downloads the *MatchFinder* database to the selected location and saves the file location in User Options.
  - If the program cannot access the location where Blackbaud stores the current *MatchFinder* database, a message appears to inform you that it cannot connect to Blackbaud’s servers. To return to the MatchFinder page, click **OK**, and have your system administrator check your internet connection.

**Note:** On the Transfer status screen, you can click **Cancel** to stop the download while it is in progress, if necessary. If you cancel the download in progress, no new data is committed to your *MatchFinder* database.

If the program can access the file location entered in User Options and the location of the current *MatchFinder* database, and your database requires an update, the program automatically downloads the current *MatchFinder* database to the file location entered in User Options. The Updating MatchFinder Database screen appears and displays the progress of the download.



**Note:** If an error occurs during the download, such as due to an internet connection failure, a message appears to inform you that the update cannot complete. Click **OK** to return to the MatchFinder page and attempt to download the database again. If an error occurs during the download, no new data is committed to your *MatchFinder* database.

When the download is complete, a message appears to inform you the update was successful.

4. Click **OK**. You return to the MatchFinder page.

# MatchFinder Organization Summary Report

**Note:** For a detailed explanation of each report and instructions on how to generate a report, see the *Reports Guide*. For a sample of each report, see the *Sample Reports Guide*.

When you use the optional module *MatchFinder*, the *MatchFinder* Organization Summary report is available. Accessed through *Reports* on the Raiser's Edge bar, this profile report displays the matching gift factor and limits of companies in the *MatchFinder* database. The exact data included depends on your parameter tab settings. For example, you can select to view information about matching gift companies in a specified location. You can also select to view only companies of a selected industry, educational institution, or other type of nonprofit organization.

MatchFinder Organization Summary						
08/21/2007						Page 1
Company Name	City	State	Industry	Ratio	Min Gift	Max Gift
3Com	Marlborough	MA	Computer	1.00		\$1,000.00
4-Guys Stainless Steel Fabricators, Inc.	Meyersdale	PA	Manufacturing			
A. Teichert & Son, Inc.	Sacramento	CA	Construction	1.00		\$75.00
A.M. Castle & Co.	Franklin Park	IL	Manufacturing	1.00		
ABC Inc.	New York	NY	Telecommunications			
Acme-Cleveland Corporation	Cleveland	OH	Manufacturing	1.00		
Acxiom Corporation	Conway	AK	Service			
A-D Electronics, Inc.	Blissfield	MI	Electronics			
Adams Harkness & Hill Inc.	BOSTON	MA	Financial Services	1.00		\$2,000.00
Advanced Technology Laboratories Inc.	Bothell	WA	Medical/Pharmaceutic	1.00		\$150.00
Aeroquip-Vickers, Inc.	Maumee	OH	Manufacturing			
Agilent Technologies	Princeton	NJ	Service	1.00		\$5,000.00
Allianz of America, Inc.	Westport	CT	Financial Services	1.00		\$5,000.00
Alpha Industries, Inc.	Woburn	MA	Manufacturing			
Amana Appliances	Amana	IA	Manufacturing			

# MatchFinder Matching Gift Company Records



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Rules Tab .....	30
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Special Terms Tab .....	32
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## Procedures

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You can work with *MatchFinder* matching gift company records in ***The Raiser's Edge***. You can also cross-reference *MatchFinder* matching gift company records with records stored in ***The Raiser's Edge***.

This chapter outlines the *MatchFinder* company records.

## Matching Gift Company Record

All matching gift company records stored in the *MatchFinder* database consist of six tabs. Each tab stores specific information such as a contact name, an address, employee restrictions, special terms, and subsidiaries. You cannot edit or change the company record.

**La-Z-Boy Inc (as of 07/12/2005)**

File Edit View Record Favorites Help

Close [Navigation Icons] [Help Icon]

Company | Employee Restrictions | Nonprofit Eligibility | Rules | Subsidiaries | Special Terms

Company name: La-Z-Boy Inc

Alias: Ladd Furniture

Fund/Foundation:

Fiscal year ends:

Industry: Manufacturing

Status: Active

Web address: www.lazyboy.com

Date: 2003

**Company Address**

Address: 4620 Grandover Pkwy  
Box 26777

City: Greensboro

State: NC ZIP: 27417-6777

Country:

Phone: 336-315-4265 Ext:

Fax: 336-315-4380

**Contact**

Last name: Sims

First name: Bernita

Middle name:

Title/Suffix: Ms.

Position: HR Generalist II

E-mail: bernita.sims@la-z-boy.com

Blackbaud routinely updates the *MatchFinder* database. From the *MatchFinder* page in ***The Raiser's Edge***, you can easily download and update the records in your *MatchFinder* database. When you update your *MatchFinder* database, the updated matching gift company files overwrite the existing files. For more information about how to update your *MatchFinder* database, see "Download and Update the MatchFinder Database" on page 22.

## Company Tab

The Company tab stores information about the matching gift company and its contact. The company name, alias, industry, address, and the contact name and position are stored on this tab. You cannot edit any information on this tab or any other tab on the company record.

**La-Z-Boy Inc (as of 07/12/2005)**

File Edit View Record Favorites Help

Close [Navigation Icons] ?

Company | Employee Restrictions | Nonprofit Eligibility | Rules | Subsidiaries | Special Terms

Company name: La-Z-Boy Inc

Alias: Ladd Furniture

Fund/Foundation:

Fiscal year ends:

Web address: www.lazyboy.com

Industry: Manufacturing

Status: Active

Date: 2003

**Company Address**

Address: 4620 Grandover Pkwy  
Box 26777

City: Greensboro

State: NC ZIP: 27417-6777

Country:

Phone: 336-315-4265 Ext:

Fax: 336-315-4380

**Contact**

Last name: Sims

First name: Bernita

Middle name:

Title/Suffix: Ms.

Position: HR Generalist II

E-mail: bernita.sims@la-z-boy.com

**Company name.** The **Company name** field displays the organization's name.

**Alias.** The **Alias** field can contain an acronym for the organization or another name by which it is known.

*The Raiser's Edge* uses the information in this field to locate a record in the *MatchFinder* database. For example, an alias for Computer Information Center may be CIC. Aliases can be used to search for and access a *MatchFinder* company record.

**Fund/Foundation.** The **Fund/Foundation** field indicates the name of a company's corporate foundation. For example, when a company makes its matching gifts through a corporate foundation, the foundation name appears in this field.

**Fiscal year ends.** The **Fiscal year ends** field indicates the date on which the company's fiscal year ends. Many companies have a limit on the amount they match within a fiscal year.

**Web address.** The **Web address** field displays a company's Web site address.

**Industry.** The **Industry** field indicates the sector of business in which the company is classified. For example, the industry for Computer Services Incorporated is the Computer industry.

**Status.** The **Status** field displays the standing of the matching gift program. The status of a company can be Active, Suspended, or Terminated.

**Date.** The **Date** field displays the date on which the status was defined.

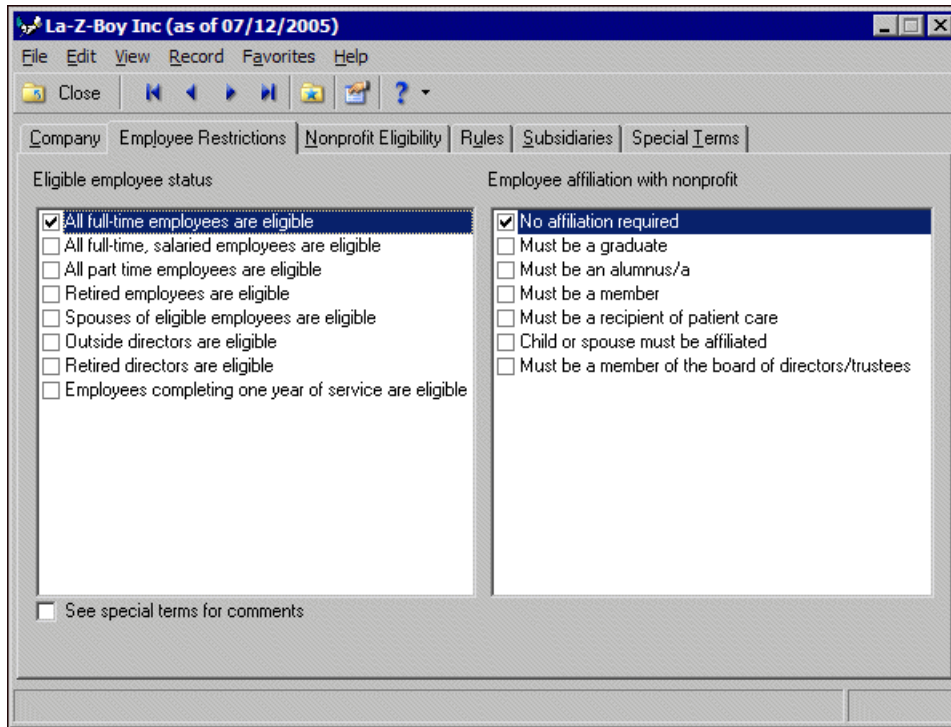
**Company Address.** In the **Company Address** frame, you can view the mailing address and phone number for the company. If the address is too long to fit in the **Address** box, use the scroll bar on the right to view the entire entry.

**Contact.** The **Contact** frame contains information about the company's contact person, including the contact's name, position, and email address.



## Employee Restrictions Tab

The Employee Restrictions tab lists guidelines for employees who request their donations be matched. Restrictions include the required statuses and nonprofit affiliations for eligible employees. You cannot edit any information on this tab or any other tab on the company record.



**Eligible employee status.** Under **Eligible employee status**, you can view a list of employment conditions that must be met for the company to match gifts. For example, statuses can include whether an employee is full-time, part-time, or retired. If a status applies to the employees of the company, its checkbox is marked.

**Employee affiliation with nonprofit.** Under **Employee affiliation with nonprofit**, you can view associations that are required between an employee and the nonprofit organization for the company to match a gift. For example, affiliations can include whether an employee is a graduate, an alumni, or a member. If an affiliation is required, its checkbox is marked.

**See special terms for comments.** When the **See special terms for comments** checkbox is marked, special terms exist that are associated with employee restrictions. You can view these terms on the Special Terms tab.



## Nonprofit Eligibility Tab

The Nonprofit Eligibility tab lists the requirements for educational institutions and other nonprofit organizations. You cannot edit any information on this tab or any other tab on the company record.

La-Z-Boy Inc (as of 07/12/2005)

File Edit View Record Favorites Help

Close [Navigation Icons]

Company | Employee Restrictions | **Nonprofit Eligibility** | Rules | Subsidiaries | Special Terms

Eligibility of education institutions	Eligibility of other nonprofits
<input type="checkbox"/> All educational institutions are eligible	<input type="checkbox"/> All other nonprofits are eligible
<input checked="" type="checkbox"/> Four year colleges and universities	<input type="checkbox"/> Hospitals
<input checked="" type="checkbox"/> Graduate and professional schools	<input type="checkbox"/> Other healthcare organizations
<input checked="" type="checkbox"/> Junior/Community colleges	<input type="checkbox"/> Museums
<input checked="" type="checkbox"/> Seminaries	<input type="checkbox"/> Social Services
<input checked="" type="checkbox"/> Technical schools	<input type="checkbox"/> Cultural organizations
<input type="checkbox"/> Public secondary schools	<input checked="" type="checkbox"/> Public broadcasting
<input type="checkbox"/> Private secondary schools	<input type="checkbox"/> Religious organizations
<input type="checkbox"/> Public elementary schools	<input type="checkbox"/> Environmental/Conservation groups
<input type="checkbox"/> Private elementary schools	<input type="checkbox"/> Charities
<input checked="" type="checkbox"/> United Negro College Fund (UNCF)	<input type="checkbox"/> United Way/federated fund drives
<input checked="" type="checkbox"/> American Indian College Fund (AICF)	<input type="checkbox"/> Other
<input checked="" type="checkbox"/> Hispanic Assoc. of Colleges and Universities (HACU)	
<input checked="" type="checkbox"/> Educational institutions must be accredited	

☐ See special terms for comments

**Eligibility of educational institutions.** Under **Eligibility of educational institutions**, you can view the company's requirements to match gifts given to educational nonprofits. For example, some companies require the institution be a four-year college, university, or seminary. If an eligibility requirement is applicable to the company, its checkbox is marked.

**Eligibility of other nonprofits.** Under **Eligibility of other nonprofits**, you can view the company's requirements to match gifts given to other nonprofits. If a nonprofit is eligible for the matching gift program, its checkbox is marked.

**See special terms for comments.** When the **See special terms for comments** checkbox is marked, special terms exist that are associated with nonprofit eligibility. You can view these terms on the Special Terms tab.

## Rules Tab

The Rules tab provides specific company regulations for the matching gift program, including maximum and minimum match amounts, matching gift factor, types of gifts, when gifts are distributed, and instructions on sending receipts. This tab also indicates what donors must do to request the company match their gifts. You cannot edit any information on this tab or any other tab on the company record.

**Lexmark International, Inc. (as of 07/11/2006)**

File Edit View Record Favorites Help

Close [Navigation Icons] ?

Company Employee Restrictions Nonprofit Eligibility **Rules** Subsidiaries Special Terms

Distribution: Quarterly Minimum gift: \$50.00

When: Quarter after gift is Max per gift: \$5,000.00

Receipting: For each gift Donor annual max: \$5,000.00

Notification: 1 year from date of Lifetime total: Match ratio: 1.00 :1

Type of gifts matched

- ☐ All gifts are matched
- ☒ Gifts by check or cash
- ☐ Gifts by credit card
- ☒ Gifts of stock/securities
- ☐ Gifts-in-kind
- ☐ Deferred gifts
- ☒ Volunteer time
- ☐ Gifts to athletic programs
- ☒ Gifts for scholarships
- ☒ Gifts to building funds
- ☐ Insurance policy premiums

Donor gets matching gift by

- ☒ Filing company's matching gift form
- ☐ Presenting company with gift receipt
- ☐ Presenting company with acknowledgement letter
- ☐ Presenting gift to company

☒ See special terms for comments

Match notes:

The maximum matched per institution is a maximum match of \$10,000.00 per calendar year.

**Distribution.** The **Distribution** field indicates the frequency at which the matching gift company issues checks. The possible distribution entries are Continual, Monthly, Quarterly, Annually, and Semi-Annually.

**When.** To further defines the **Distribution** field, the **When** field indicates a more specific time when a company issues checks. For example, if the company issues checks at the end of every month, "Monthly" appears in the **Distribution** field and "End of Month" appears in the **When** field.

**Receipting.** The **Receipting** field indicates how the company handles receipts. The choices are No Receipt, For Each Gift, For Each Gift >= \$250 (greater than or equal to), or Annual Receipt.

**Notification.** The **Notification** field displays the date or deadline by which your organization must file the matching gift claim.

**Minimum gift.** The **Minimum gift** field displays the minimum gift amount the company matches. If the company does not require a minimum amount, this field is blank.

**Max per gift.** The **Max per gift** field displays the maximum gift amount the company matches for a single gift.

**Donor annual max.** The **Donor annual max** field displays the maximum total amount the company matches for each donor per fiscal year.

**Lifetime total.** The **Lifetime total** field displays the total amount, per donor, that a company matches. If the company sets a maximum **Lifetime Total** per donor that will be matched, it is stored in this field.

**Match ratio.** The **Match ratio** is the rate at which the company matches gifts. For example, if the company gives \$2 for every \$1 donated by its employees, the match ratio is two.

**Donor gets matching gift by.** The **Donor gets matching gift by** box lists the different possible procedures for requesting that a gift be matched. If a procedure applies to the company, its checkbox is marked.

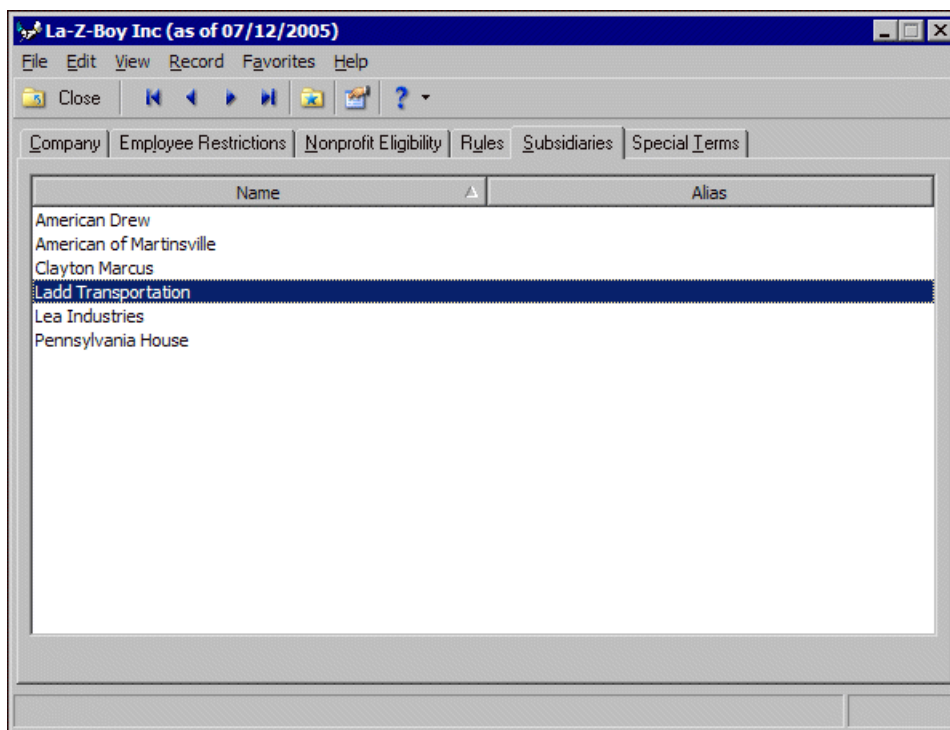
**Types of gifts matched.** The **Types of gifts matched** box lists the different classifications of gifts a company can match. If the company matches a gift type, its checkbox is marked.

**Match notes.** The **Match notes** box displays additional information about the company's matching gift program. This field often displays additional notes about the match ratio.

**See special terms for comments.** When the **See Special Terms for Comments** checkbox is marked, special terms exist about the company's rules for matching gifts. You can view these terms on the Special Terms tab.

## Subsidiaries Tab

The Subsidiaries tab lists the companies that are a part of the parent corporation. To retrieve a parent company's record, you can enter a subsidiary company name on the Open a Company screen. You cannot edit any information on this tab or any other tab on the company record.

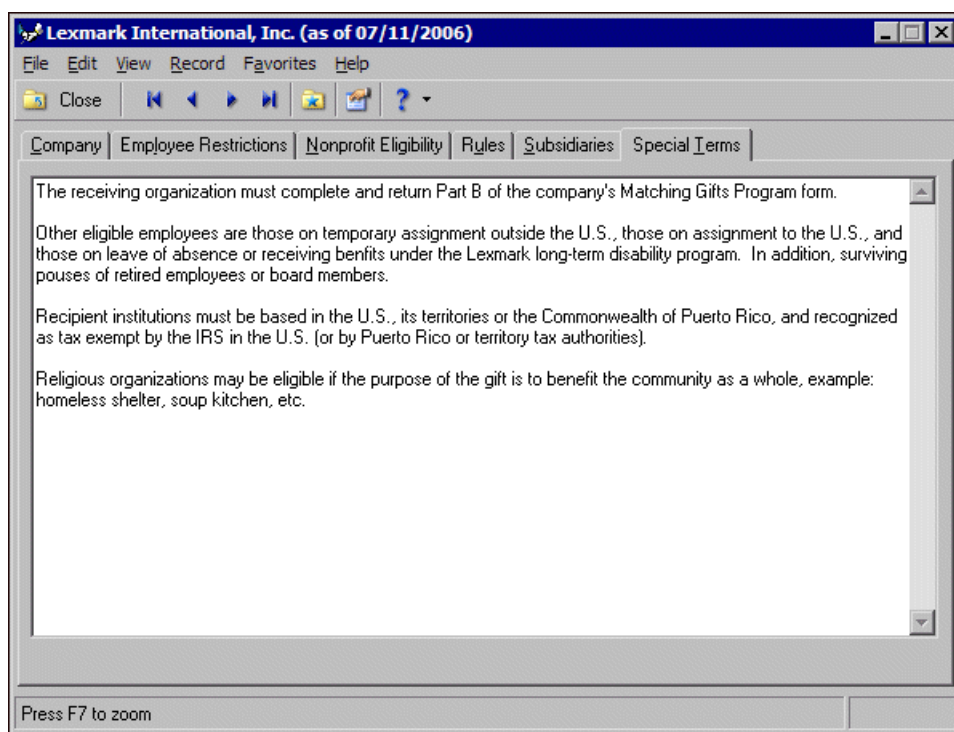


**Name.** In the **Name** column, you can view the names of subsidiaries that are part of the parent corporation.

**Alias.** For each subsidiary listed, any aliases appears in the **Alias** column. An alias is another name by which the company is known. The Subsidiaries tab also lists whether the employees of that subsidiary are eligible to participate in the parent company's matching gift program.

## Special Terms Tab

The Special Terms tab displays any special conditions for matching gifts. If, on another tab, the **See special terms for comments** checkbox is marked, additional information exists on the Special Terms tab. You cannot edit any information on this tab or any other tab on the company record.



## Cross-Reference MatchFinder Records with The Raiser's Edge

The cross-reference tool is one of the most important and unique features of *MatchFinder*. With the cross-reference tool, the organization relationships of individual constituents in your **The Raiser's Edge** database are matched with matching gift company records in *MatchFinder*. Once the cross-referencing is complete, you can view the matched records and update the cross-referenced records as necessary.

### Launch the Cross-Reference Tool

The cross-reference tool is one of the most important and unique features of *MatchFinder*. With the cross-reference tool, the organization constituents and organization relationships of individual constituents in **The Raiser's Edge** are matched with matching gift company records in *MatchFinder*.

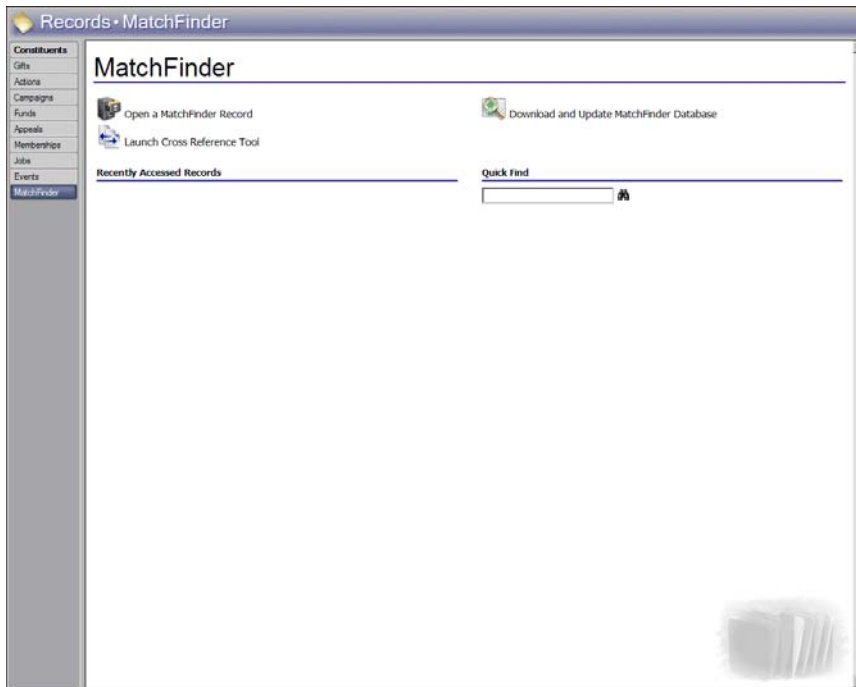
Before you use the cross-reference tool, we recommend you back up your database. If you are unsatisfied with the cross-reference results, you can easily restore your database from the backup.

► **Launch the cross-reference tool**

**Scenario:** You want to know how many *MatchFinder* records match records stored in your database in *The Raiser's Edge*. To find this information, cross-reference matching gift company records in *MatchFinder* with the organizations stored in *The Raiser's Edge*. Once you cross-reference these records, you can select which matching records to link and import the information to update your records in *The Raiser's Edge*.

**Warning:** Before you launch the cross-reference tool, we recommend you back up your database in *The Raiser's Edge*. If you are unsatisfied with the cross-reference results, you can easily restore your database from the backup.

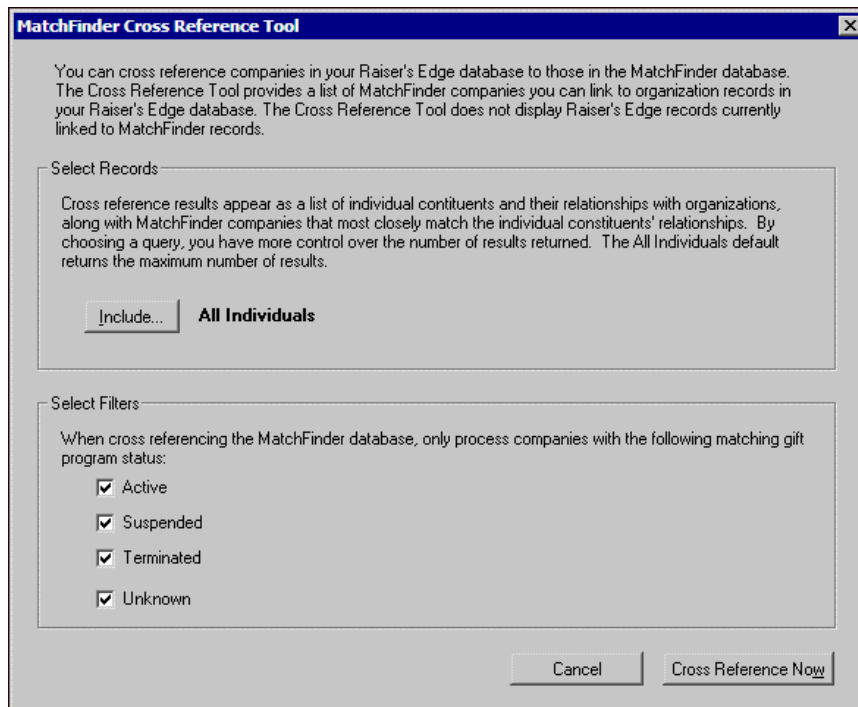
1. On the Raiser's Edge bar, click **Records**.
2. Click **MatchFinder**. The MatchFinder page appears.



**Warning:** To avoid simultaneous linking of records, only one user in *The Raiser's Edge* can use the cross-reference tool at a time. If another user is using the cross-reference tool when you click **Launch Cross-Reference Tool**, a message appears to inform you that it is already in use. To return to the MatchFinder page, click **OK**.

3. Click **Launch Cross-Reference Tool**. A message appears to recommend you back up your database in *The Raiser's Edge* before you launch the cross-reference tool.

4. To cross-reference the records in the *MatchFinder* and *The Raiser's Edge* databases, click **Yes**. The Select Records and Filters screen appears.



5. The **Select Records** frame displays the constituents to include in the cross-reference process. To return the maximum number of results, "All Individuals" appears by default.

**Note:** If you select a query of records but change your mind, you can easily return to the default "All Individuals" selection. Click **Include** and select **All Individuals**.

To reduce the number of results returned, you can select a query of individual constituent records with organization relationships to cross-reference. For example, you may want to use a query that contains individual constituents who have an organization relationship with a specific company.

- a. In the **Select Records** frame, click **Include** and select **Selected Individuals**. The Open Query screen appears.

Open Query

Find: Queries

Find Queries that meet these criteria:

Query type: Individual

Query format:

Query name:

Description:

☐ Show merged queries only ☐ Exact match only

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results

- b. Under **Find Queries that meet these criteria**, enter the criteria to use to search for the query of individual constituents to use. Criteria can include the format, name, or description of the query; the date on which the query was created; or the person who created the query. You can also select whether to display only merged queries or those that match the criteria exactly.
- c. Click **Find Now**. In the box, the queries in *The Raiser's Edge* that match the criteria entered appear.

Open Query

Find: Queries

Query Name	Query Description	Type	Format	Created By
All Volunteers	Query for use with th...	Individual	Dynamic	Supervisor
Giving less than \$10.00		Individual	Static	Supervisor
Individual search for ...	Used by the Search S...	Individual	Dynamic	Supervisor
Solicit Code of Do not...		Individual	Dynamic	Supervisor

Find Queries that meet these criteria:

Query type: Individual

Query format:

Query name:

Description:

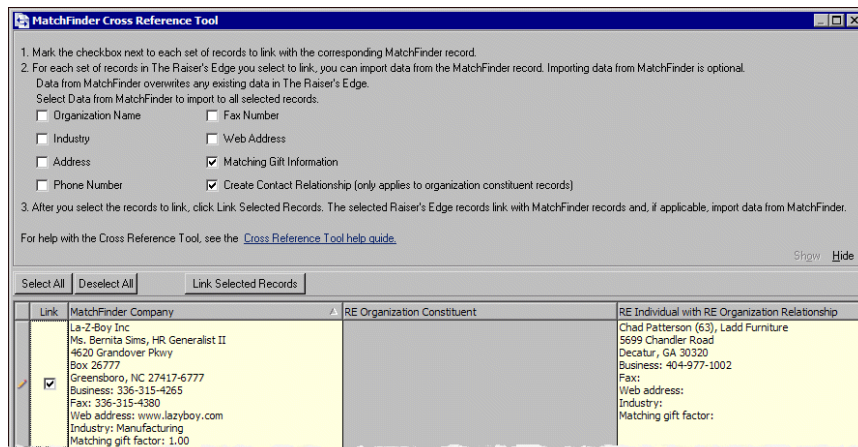
☐ Show merged queries only ☐ Exact match only

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results

- d. Select the query to use and click **Open**. You return to the cross-reference tool. Next to the **Include** button, the selected query appears.
6. In the **Select Filters** frame, mark the checkboxes by the matching gift program statuses to include. In *MatchFinder*, each parent corporation or unaffiliated organization has a **Status** field that defines the current standing of its matching gift program. The statuses you select determine the companies included in the cross-reference process.



- To include companies that currently have matching gift programs, mark **Active**.
  - To include companies with permanently canceled matching gift programs, mark **Terminated**.
  - To include companies with indefinitely canceled matching gift programs, mark **Suspended**.
  - To include companies when no data about the matching gift program status is available, mark **Unknown**.
7. Click **Cross-reference now**. The cross-reference tool automatically compares the matching gift companies in the *MatchFinder* database to the organization relationships of the selected individual constituents in *The Raiser's Edge*. Depending on the size of your database in *The Raiser's Edge*, the cross-reference process may take some time. For very large databases, the process may take up to several hours.
- If your selected query and filters are too specific, all matching records are already linked, or no organizations in *The Raiser's Edge* match a company in the *MatchFinder* database, the cross-reference tool cannot return any results. If the cross-reference tool cannot match any records, a message appears to inform you of this. To return to the *MatchFinder* screen, click **OK**.
  - If the cross-reference tool matches a selected record in *The Raiser's Edge* to a record in *MatchFinder*, the results screen appears. On this screen, you can link matching records and specify whether to import data into *The Raiser's Edge* from linked *MatchFinder* records. For information about how to use the cross-reference results, see "Cross-Reference Tool Results" on page 36.



## Cross-Reference Tool Results

Once the cross-reference tool matches organizations in your database in *The Raiser's Edge* with matching gift company records in *MatchFinder*, you can view the results and update the cross-referenced records as necessary. You can also export or print the results, such as to create an electronic or a hard copy spreadsheet to share with a non-*MatchFinder* user. From the results, you can also view a matched record in the *MatchFinder* or *The Raiser's Edge* database.

## Link Matched Records and Import MatchFinder Data into The Raiser's Edge

Once the cross-reference tool matches organizations in your *The Raiser's Edge* database with matching gift company records in the *MatchFinder* database, you can view the cross-reference results. From the results, you can select to link matched records in *MatchFinder* and *The Raiser's Edge*. You can also specify *MatchFinder* data to import into linked records in *The Raiser's Edge*.



► **Create links between matched records from the cross-reference results**

1. Launch the cross-reference tool. If an organization in *The Raiser's Edge* matches a matching gift company in the *MatchFinder* database, the cross-reference tool results screen appears. For information about how to use the cross-reference tool, see "Launch the Cross-Reference Tool" on page 32.

MatchFinder Cross Reference Tool

1. Mark the checkbox next to each set of records to link with the corresponding MatchFinder record.

2. For each set of records in The Raiser's Edge you select to link, you can import data from the MatchFinder record. Importing data from MatchFinder is optional. Data from MatchFinder overwrites any existing data in The Raiser's Edge. Select Data from MatchFinder to import to all selected records.

☐ Organization Name ☐ Fax Number

☐ Industry ☐ Web Address

☐ Address ☒ Matching Gift Information

☐ Phone Number ☒ Create Contact Relationship (only applies to organization constituent records)

3. After you select the records to link, click Link Selected Records. The selected Raiser's Edge records link with MatchFinder records and, if applicable, import data from MatchFinder.

For help with the Cross Reference Tool, see the [Cross Reference Tool help guide](#).

Select All Deselect All Link Selected Records

Link	MatchFinder Company	RE Organization Constituent	RE Individual with RE Organization Relationship
<input checked="" type="checkbox"/>	La-Z-Boy Inc. Ms. Bernita Sims, HR Generalist II 4620 Grandover Pkwy Box 26777 Greensboro, NC 27417-6777 Business: 336-315-4265 Fax: 336-315-4380 Web address: www.lazboy.com Industry: Manufacturing Matching gift factor: 1.00		Chad Patterson (63), Ladd Furniture 9699 Chandler Road Decatur, GA 30320 Business: 404-977-1002 Fax: Web address: Industry: Matching gift factor:

**Note:** To view more rows of the grid, you can hide the instructions and checkboxes at the top of the screen. To hide this section, click **Hide**. To display this section again, such as to select data to import, click **Show**.

At the bottom of the screen, the grid displays the matching records found by the cross-reference tool.

- The **MatchFinder Company** column displays companies in the *MatchFinder* database that match organizations in *The Raiser's Edge*. For each company listed, you can view information from the Company tab of its *MatchFinder* record. By default, the grids sorts alphabetically by this column.
- For each **MatchFinder Company**, the **RE Organization Constituent** column displays an organization constituent in *The Raiser's Edge* that matches the matching gift company. For each organization listed, you can view information from the organization constituent record, including address lines, phone numbers, industry, and matching gift factor.

If the **MatchFinder Company** does not have a matching organization constituent, such as if it matches only an organization relationship, the **RE Organization Constituent** column is disabled.

- For each **MatchFinder Company**, the **RE Individual with RE Organization Relationship** column displays an individual constituent in *The Raiser's Edge* who has a relationship with the matched organization constituent or with an organization that matches the matching gift company. For each individual listed, you can view information from the organization relationship record, including address lines, phone numbers, industry, and matching gift factor.
2. In the **Link** column, mark the checkbox next to each set of *The Raiser's Edge* records to link to the corresponding *MatchFinder* record.

To mark all checkboxes in the results, including those not immediately visible, click **Select All** on the action bar. To unmark all marked checkboxes, click **Deselect All**.

**Warning:** You do not have to import any data from *MatchFinder*. Data imported from *MatchFinder* automatically overwrites any corresponding data that exists in *The Raiser's Edge*.

3. For each selected set of records, you can import data from the corresponding *MatchFinder* record. At the top of the screen, select the *MatchFinder* data to import for the selected records. You can select to import the organization name, industry, address, phone number, fax number, Web site address, or matching gift information. For matched organization constituents, you can also select whether to use the *MatchFinder* information to create contact relationships.

By default, the **Matching Gift Information** and **Create Contact Relationship** checkboxes are automatically marked.

**Note:** If you select to import phone, fax, or Web address data from *MatchFinder* and there is no corresponding phone type in *The Raiser's Edge*, the program automatically creates the phone type when it links the records. For example, if you import a business phone number and the Business phone type does not exist in *The Raiser's Edge*, the program creates a phone type of "MF Business phone".

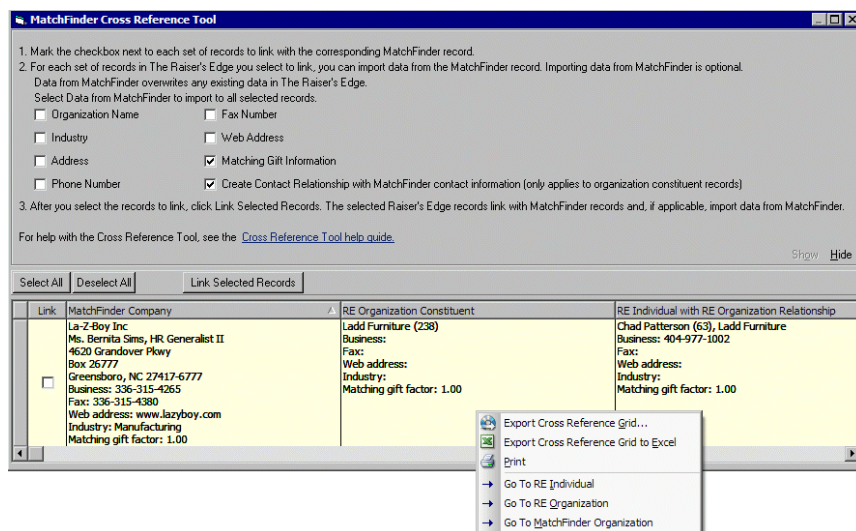
4. On the action bar of the grid, click **Link Selected Records**. The cross-reference tool links the records and imports the selected *MatchFinder* data. Once the records are linked, a confirmation message displays how many organization in *The Raiser's Edge* were linked to *MatchFinder* records.
5. Click **OK**. You return to the MatchFinder page.

## Export the Cross-Reference Results

Once the cross-reference tool matches organizations in your *The Raiser's Edge* database with matching gift company records in *MatchFinder*, you can export the results, such as to create an electronic spreadsheet to share with a non-*MatchFinder* user. To can export the results directly into Microsoft *Excel* or as a grid in another format.

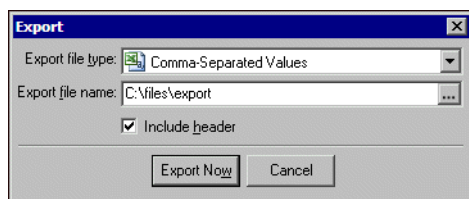
### ► Export the cross-reference results as a grid

1. Launch the cross-reference tool. If an organization in *The Raiser's Edge* matches a matching gift company in *MatchFinder*, the results screen appears. For information about how to use the cross-reference tool, see "Launch the Cross-Reference Tool" on page 32.

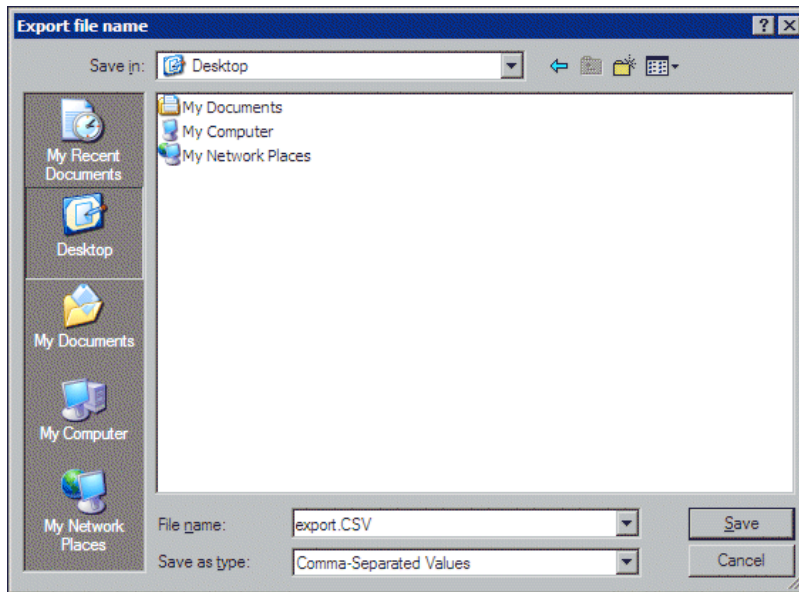


At the bottom of the screen, the grid displays the matching records found by the Cross-Reference Tool. For information about this grid, see "Link Matched Records and Import MatchFinder Data into The Raiser's Edge" on page 36.

2. In the grid, right-click and select **Export Cross-Reference Grid**. The Export screen appears.



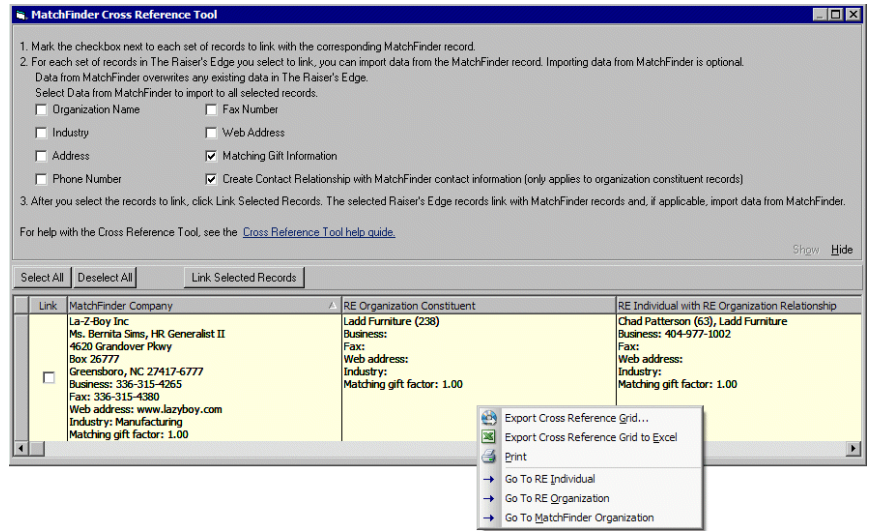
3. In the **Export file type** field, select the type of export file to create. You can select to create a comma-separated values file (\*.csv), Microsoft Access database file (\*.mdb), *WordPerfect* merge file (\*.dat), hypertext markup language file (\*.htm), rich text format file (\*.rtf), dBase III or FoxPro database file (\*.dbf), Microsoft *Excel* file (\*.xls), Lotus 1-2-3 file (\*.wk1 or \*.wk3), character-separated values file (\*.chr), text file (\*.txt), extensible markup language file (\*.xml), or Microsoft *ADO Recordset 2.1* file (\*.ado).
4. In the **Export file name** field, the file location specified in User Options for exported files automatically appears. If necessary, you can export the results grid to another file location.
  - a. In the **Export file name** field, click the ellipsis. The Export file name screen appears.



- b. In the **Save in** field, map to the new file location.
  - c. In the **File name** field, the name of the export file appears. Adjust the file name as necessary.
  - d. Click **Save**. You return to the Export screen.
5. To include the file name in a header that appears in the export file, mark **Include header**.
6. Click **Export Now**. The grid is exported to the file location specified in the **Export file name** field.

► **Export the cross-reference results into Microsoft Excel**

1. Launch the cross-reference tool. If an organization in *The Raiser's Edge* matches a matching gift company in *MatchFinder*, the results screen appears. For information about how to use the cross-reference tool, see “Launch the Cross-Reference Tool” on page 32.



At the bottom of the screen, the grid displays the matching records found by the Cross-Reference Tool. For information about this grid, see “Link Matched Records and Import MatchFinder Data into The Raiser’s Edge” on page 36.

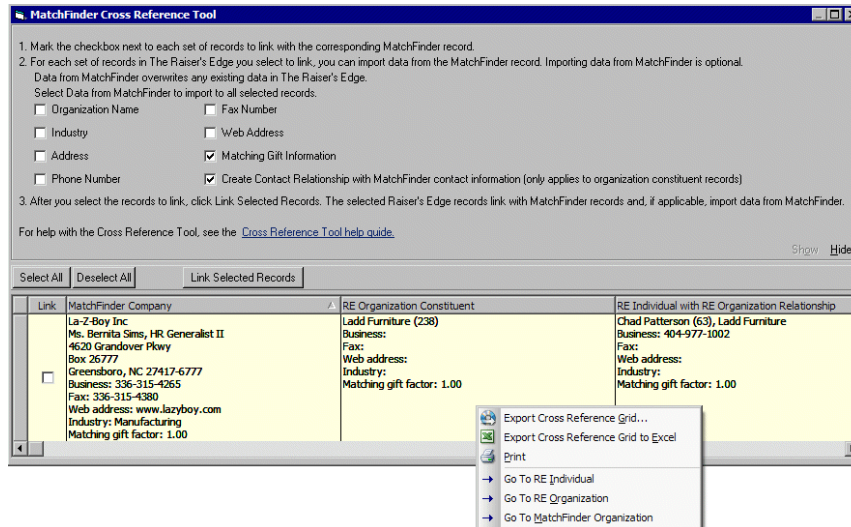
2. In the grid, right-click and select **Export Cross-Reference Grid to Excel**. The grid exports into an Microsoft Excel (\*.xls) file. When the export is complete, Microsoft Excel automatically opens the file.

# Print the Cross-Reference Results

Once the cross-reference tool matches organizations in your *The Raiser’s Edge* database with matching gift company records in *MatchFinder*, you can print the results, such as to share with a non-*MatchFinder* user.

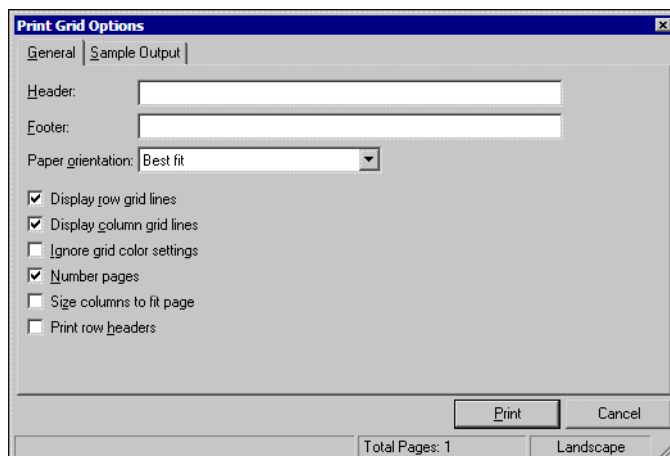
### ► Print the cross-reference results

1. Launch the cross-reference tool. If an organization in *The Raiser's Edge* matches a matching gift company in *MatchFinder*, the results screen appears. For information about how to use the cross-reference tool, see “Launch the Cross-Reference Tool” on page 32.



At the bottom of the screen, the grid displays the matching records found by the Cross-Reference Tool. For information about this grid, see “Link Matched Records and Import MatchFinder Data into The Raiser's Edge” on page 36.

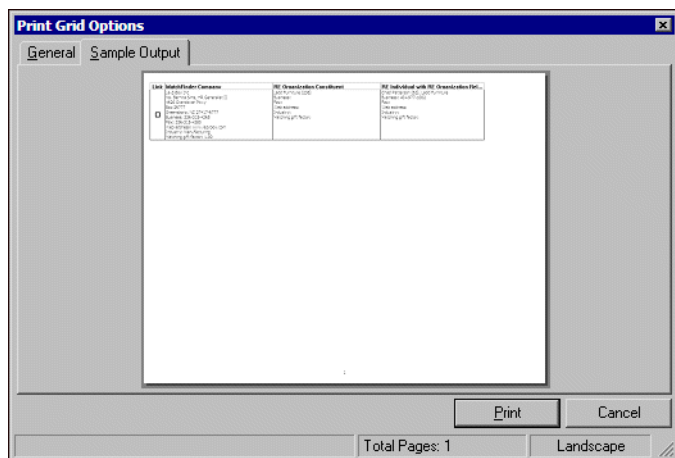
2. In the grid, right-click and select **Print**. The Print Grid Options screen appears.
3. Select the General tab.



4. To print the results with a header at the top of each page, enter the text to appear in the **Header** field.
5. To print the results with a footer at the bottom of each page, enter the text to appear in the **Footer** field.
6. In the **Paper orientation** field, select the orientation at which to print the results. You can select Best fit, Portrait, Landscape, or Use printer default.
7. Below the **Paper orientation** field, specify how the printed results should appear. You can select whether to display row or column grid lines, ignore the grid's color settings, include page numbers, size the grid's columns to fit the printed page, or print the row headers. Mark the checkboxes for the styles to use for the printed results.



- To view how the printed results appear with the selected styles, select the Sample Output tab. In the box, a preview of the printed results appears.



If you are not satisfied with the appearance of the printed results, select the General tab and adjust the selected styles as necessary.

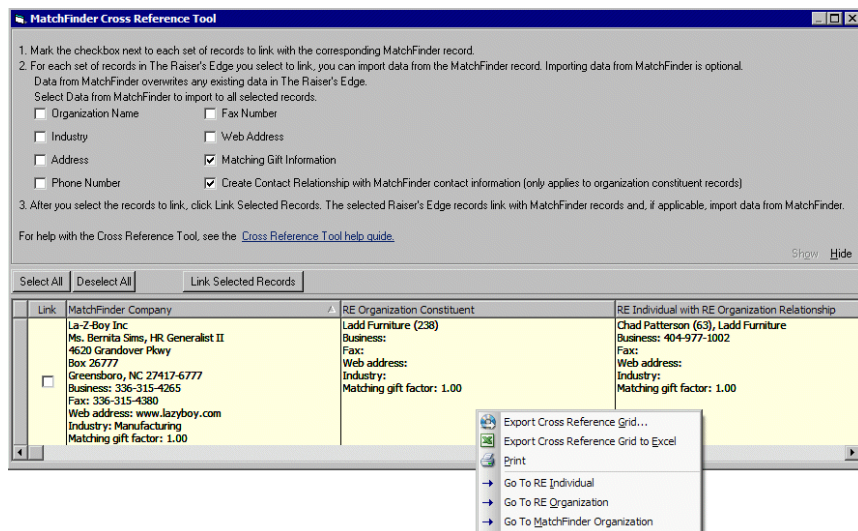
- To print the cross-reference results, click **Print**. The grid prints to your default printer.

## View a Record in the Cross-Reference Results

Once the cross-reference tool matches organizations in your *The Raiser's Edge* database with matching gift company records in *MatchFinder*, you can view the results. From the results, you can also view a matching gift company record, an organization constituent record, or an individual constituent record with a relationship to an organization included in the results. For example, you may want to review additional information about an organization matched during the cross-reference process.

### ► View a record included in the cross-reference results

- Launch the cross-reference tool. If an organization in *The Raiser's Edge* matches a matching gift company in *MatchFinder*, the results screen appears. For information about how to use the cross-reference tool, see “Launch the Cross-Reference Tool” on page 32.



At the bottom of the screen, the grid displays the matching records found by the Cross-Reference Tool. For information about this grid, see “Link Matched Records and Import MatchFinder Data into The Raiser’s Edge” on page 36.

2. In the grid, select the row of the record to view.
3. Right-click and select the type of record to view.
  - To view the record of an individual constituent with an organization relationship with the matching gift company, select **Go to RE Individual**. The individual constituent record in *The Raiser’s Edge* opens.
  - To view the record of an organization constituent matched to the matching gift company, select **Go to RE Organization**. The organization constituent record in *The Raiser’s Edge* opens.
  - To view the record of the matching gift company, select **Go to MatchFinder Organization**. The matching gift company record in the *MatchFinder* database opens.





# Linked MatchFinder Information



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When you access *MatchFinder* records through an organization constituent record in **The Raiser's Edge**, you can create links between the organization constituent record and its corresponding *MatchFinder* records. You can also create links between constituent organization relationship records and *MatchFinder* records. This helps you keep track of the matching gift programs for organizations in your **Raiser's Edge** database.

You can also break links between **Raiser's Edge** records and *MatchFinder* records. For example, you learn that a company's matching gift program no longer exists. If a link exists between a constituent in your database and a *MatchFinder* record, you can break the link and create a new link with another matching gift company.

## Create and Break Links with MatchFinder Records

When you access a *MatchFinder* record through an organization constituent record or organization relationship record, you can link the record in **The Raiser's Edge** with the information stored in *MatchFinder*. This helps keep your matching gift information in **The Raiser's Edge** current. When you link records, you can also quickly research matching gift potential. For example, you know Smith Merger Corporation is a matching gift company in the *MatchFinder* database. Several organizations in your **Raiser's Edge** database are affiliated with Smith Merger Corporation. Because of this, you want to create a link between Smith Merger Corporation and the affiliated organization constituent records. You can create a link between the records so you know the matching gift potential of the organization records in your database.

**Note:** You can also use the cross-reference tool to match companies in the *MatchFinder* database to organizations in your **Raiser's Edge** database. Once you launch the cross-reference tool, you can create links between the *MatchFinder* database and your records in **The Raiser's Edge**. For information about the cross-reference tool, see "Launch the Cross-Reference Tool" on page 32.

From the Org 1 tab of an organization constituent record, a **MatchFinder** button appears. When you click **MatchFinder**, you can look up matching gift company records stored in the *MatchFinder* database, create links to these matching gift company records, or break links so you can create new links.

The same functionality exists on the General 2 tab of all organization relationship records for a constituent. For individual constituent records, you access the primary organization relationship record (primary business) from the **Business** button on the Bio 1 tab. To access all other organization relationship records for individual and organization constituent records, select the Relationships tab and select **Organizations** from the list on the left. Whether you work with organization relationship records for an organization or individual constituent, you can work with *MatchFinder* information to ensure your constituent records stay updated. For more information about how to access the Relationships tab of a constituent record, see the Relationships chapter of the *Constituent Data Entry Guide*.

From the Matching Gifts tab of a gift record, you can view *MatchFinder* information that already exists for a constituent. You cannot edit, create links, or break links from the Matching Gifts tab. The following sections describe the various ways to create and break links with *MatchFinder* records. For more information about how to access constituent records in **The Raiser's Edge**, see "Navigating in MatchFinder" on page 7.

## Organization Record

**Note:** From the General 2 tab of all your organization relationship records, you can also view matching gift information, and create and break links with *MatchFinder* records.

From the Org 1 tab of an organization constituent record, you can create or break a link to a *MatchFinder* record. From the Relationships tab of an organization constituent record, you can also apply *MatchFinder* information to any organization relationships that exist for your organization. The following procedures show you how to work with *MatchFinder* information from the Org 1 tab of an organization constituent record.

► Create a link between an organization constituent and a MatchFinder company record

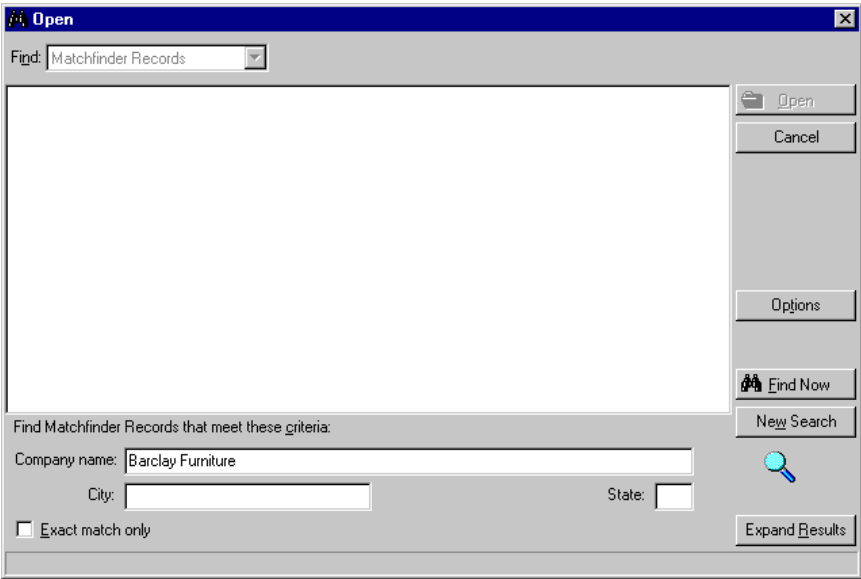
**Scenario:** From *The Raiser's Edge*, you want to create a link between Ladd Furniture's organization constituent record, and the matching gift company record in the *MatchFinder* database of its parent, La-Z-Boy Inc. Open the organization record for Ladd Furniture in *The Raiser's Edge* and search for its record in the *MatchFinder* database. Once you match the records, you can use the information linked between the records to help with your fundraising and solicitation efforts.

1. From the organization constituent record, select the Org 1 tab. For more information about how to access an organization constituent record, see "Access MatchFinder Information" on page 7. For more information about working with constituent records, see the *Constituent Data Entry Guide*.

The screenshot shows the 'Ladd Furniture' organization record in 'The Raiser's Edge' software. The 'Org 1' tab is selected. The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the menu bar, there are tabs for 'Honor/Memorial', 'Volunteer', 'Prospect', 'Membership', and 'Events'. The 'Org 1' tab is active, showing fields for 'Org Name' (Ladd Furniture), 'Constituent ID' (238), and 'Preferred Address : Business'. The address fields include 'Country' (United States), 'Address lines', 'City', 'State', 'ZIP', and 'DPC'. There is a 'Phones/Email/Links' section with a table for 'D...', 'Type', 'Number/Email A...', and 'Shared?'. A 'Notes' section is also present. At the bottom, there are checkboxes for 'This constituent' (Is inactive, Is a solicitor, Gives anonymously, Requests no email) and a 'MatchFinder' button.

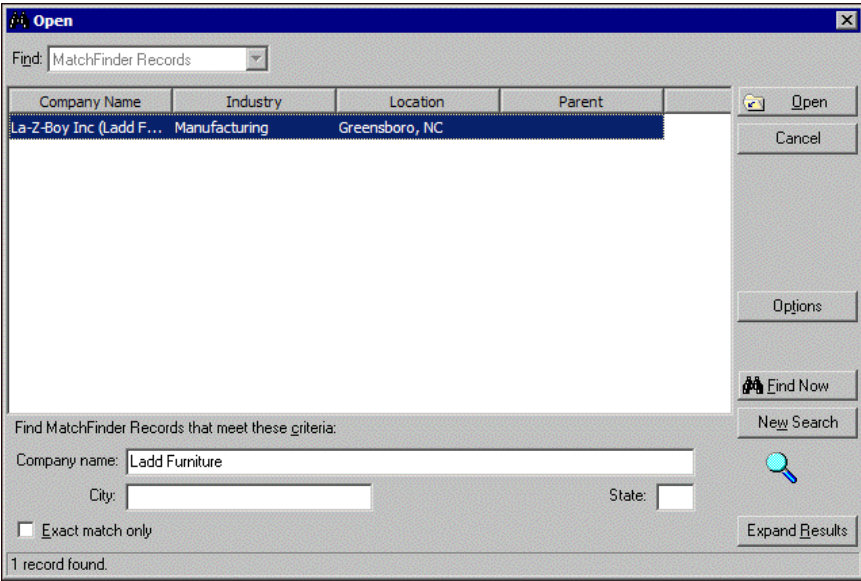
Matching Gift Limits			
	Minimum	Maximum	
Per gift			
Annual per donor			
Total per donor			

2. Click **MatchFinder**. The Open screen for MatchFinder appears.



3. In the **Find Matchfinder Records that meet these criteria** frame, the organization's name automatically appears in the **Company name** field.

Click **Find Now**. If the organization name matches a company record in the *MatchFinder* database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find one or multiple records.



4. In the grid, select the company record for the organization and click **Open**. The *MatchFinder* record appears.

The screenshot shows a window titled "La-Z-Boy Inc (as of 07/12/2005)". It has several tabs: Company, Employee Restrictions, Nonprofit Eligibility, Rules, Subsidiaries, and Special Terms. The "Company" tab is active. The form contains the following fields:

- Company name: La-Z-Boy Inc
- Alias: Ladd Furniture
- Fund/Foundation: (empty)
- Industry: Manufacturing
- Fiscal year ends: (empty)
- Status: Active
- Web address: www.lazyboy.com
- Date: 2003

Below these are two sections: "Company Address" and "Contact".

**Company Address:**

- Address: 4620 Grandover Pkwy, Box 26777
- City: Greensboro
- State: NC, ZIP: 27417-6777
- Country: (empty)
- Phone: 336-315-4265, Ext: (empty)
- Fax: 336-315-4380

**Contact:**

- Last name: Sims
- First name: Bernita
- Middle name: (empty)
- Title/Suffix: Ms., (empty)
- Position: HR Generalist II
- E-mail: bernita.sims@la-z-boy.com

At the bottom are "Link" and "Cancel" buttons.

In some cases, the *MatchFinder* record you select to open may not have the same name of the *MatchFinder* record that actually opens. This is because one company can have multiple subsidiaries. Subsidiaries are companies that are owned by or are a part of another company. For example, you select to open the *MatchFinder* record for Ladd Furniture. The *MatchFinder* record for La-Z-Boy Inc. appears. The same matching gift company information exists for both companies because Ladd Furniture is listed as a subsidiary of La-Z-Boy Inc. on the Subsidiaries tab.

5. To create a link between the organization constituent record and the *MatchFinder* record, click **Link**. The Import From MatchFinder screen appears.

The screenshot shows a dialog box titled "Import From MatchFinder...". It contains a list of checkboxes for selecting information to import:

- ☐ Organization Name
- ☐ Industry
- ☐ Address
- ☐ Phone Number
- ☐ Fax Number
- ☐ Web Address
- ☒ Matching Gift Information
- ☐ Create Contact Relationship

At the bottom are "OK" and "Cancel" buttons.

6. In the list, mark the checkboxes for the information to import. For example, to import only the matching gift information for this *MatchFinder* record, mark **Matching Gift Information**.

7. Click **OK**. You return to the organization constituent record. The information you select to import from *MatchFinder* automatically appears in the applicable fields of the organization constituent record.

The screenshot shows the 'Ladd Furniture' software window. The 'Org 1' tab is selected, showing the 'Addresses' section. The 'Org Name' is 'Ladd Furniture' and the 'Constituent ID' is '238'. The 'Preferred Address : Business' section includes fields for Country (United States), Address lines, City, State, ZIP, and DPC. A 'Phones/Email/Links' table is also present. The 'Matching Gift Information' section is expanded, showing a 'Factor' of 1.00 and a 'Fiscal year starts' field. Below this is a table for 'Matching Gift Limits'.

	Minimum	Maximum
Per gift	\$25.00	\$500.00
Annual per donor		\$1,000.00
Total per donor		

The 'Notes' section is empty. At the bottom, there are checkboxes for 'Is inactive', 'Is a solicitor', 'Gives anonymously', 'Has no valid addresses', and 'Requests no email'. A 'MatchFinder' button is highlighted in red.

A link now exists between the two records, and you can click **MatchFinder** to view the *MatchFinder* record for the organization.

8. To save and close the record, click **Save and Close** on the toolbar.



► Break a link between an organization constituent and a MatchFinder record

**Scenario:** You discover that Ladd Furniture no longer supports a matching gift program. Ladd Furniture happens to be an organization constituent in your database. Open Ladd Furniture's constituent record and break the link you created to its parent company, La-Z-Boy Inc. This scenario is based on the link created in "Create a link between an organization constituent and a MatchFinder company record" on page 47.

1. From the organization constituent record, select the Org 1 tab. For more information about how to access an organization constituent record, see "Access MatchFinder Information" on page 7. For more information about working with constituent records, see the *Constituent Data Entry Guide*.

**Ladd Furniture**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Org 1 Org 2 Addresses Relationships Appeals Notes Gifts Attributes Media Actions

Org Name: Ladd Furniture Aliases

Constituent ID: 238

Preferred Address : Business

Country: United States More...

Address lines:

City:

State:

ZIP: DPC:

Phones/Email/Links

D...	Type	Number/Email A...	Shared?

Solicit code:

☒ Organization matches Gifts

Matching Gift Information

Factor: 1.00 Fiscal year starts:

	Minimum	Maximum
Per gift	\$25.00	\$500.00
Annual per donor		\$1,000.00
Total per donor		

Notes:

This constituent

☐ Is inactive ☐ Is a solicitor Details

☐ Gives anonymously ☐ Has no valid addresses

☐ Requests no email

☒ MatchFinder Bank

Press F7 to zoom

2. Click **MatchFinder**. The linked *MatchFinder* record appears.

**La-Z-Boy Inc (as of 07/12/2005)**

Company | Employee Restrictions | Nonprofit Eligibility | Rules | Subsidiaries | Special Terms

Company name: La-Z-Boy Inc

Alias: Ladd Furniture

Fund/Foundation:

Fiscal year ends:

Web address: www.lazyboy.com

Industry: Manufacturing

Status: Active

Date: 2003

**Company Address**

Address: 4620 Grandover Pkwy  
Box 26777

City: Greensboro

State: NC ZIP: 27417-6777

Country:

Phone: 336-315-4265 Ext:

Fax: 336-315-4380

**Contact**

Last name: Sims

First name: Bernita

Middle name:

Title/Suffix: Ms.

Position: HR Generalist II

E-mail: bernita.sims@la-z-boy.com

Break Link Cancel

3. To break the link between the organization constituent record and the *MatchFinder* record, click **Break Link**. You return to the Org 1 tab of the organization constituent record. The link between the two records is now broken.
4. To search for a new *MatchFinder* record with which to create a link, click **MatchFinder**. For more information about how to create a link, see “Create a link between an organization constituent and a MatchFinder company record” on page 47.
5. To save and close the record, click **Save and Close** on the toolbar.

## Organization Relationship Record

From the General 2 tab of all organization relationship records, you can create a link and break a link to a *MatchFinder* record. For individual constituent records, you can access the primary organization relationship record (primary business) from the **Business** button on the Bio 1 tab. To access all other organization relationship records for individual and organization constituent records, you should select the Relationships tab and select **Organizations** from the list on the left. Whether you are working with organization relationship records for an organization or an individual, you can work with *MatchFinder* information to ensure your constituent records stay updated.

► **Create a link between an organization relationship and a MatchFinder record**

**Scenario:** Last week, you discovered that Chad Patterson, a constituent in your database, has worked for Ladd Furniture for over 30 years and is a loyal employee to the company. You know that Ladd Furniture has a matching gift program. You want to track this information on Chad's record for possible donations to your organization.

From the Relationships tab of an individual or organization constituent record, you can apply *MatchFinder* information to any organization relationships that exist for a constituent record. The following procedures show you how to work with *MatchFinder* information from the General 2 tab of an organization relationship record for an individual constituent.

1. From the constituent record, select the Bio 1 tab. For more information about accessing an organization constituent record, see "Access MatchFinder Information" on page 7. For more information about working with constituent records, see the *Constituent Data Entry Guide*.

**Chad Patterson**

File Edit View Constituent Letter Favorites Tools Help

Save and Close

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

**Biographical**

Last name: Patterson Aliases  
 First name: Chad  
 Middle name:  
 Titles: Mr.  
 Suffixes:  
 Nickname:  
 Maiden name:  
 Constituent ID: 63  
 Gender: Male SSN:  
 Birth date: 04/03/1975 Age: 32  
 Deceased? Date:  
 Marital status: Single  
 Spouse  
 Solicit code: Do not call after 9:00 PM

**Preferred Address : Home**

Country: United States  
 Address lines: 845 Heinz Street  
 City: Atlanta  
 State: GA Georgia  
 ZIP: 30303 DPC:

DNC	Type	Number/Email Address	Shared?
	Home	404-257-9854	Shared

**Phones/Email/Links**

This constituent

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

Member (10/15/2000 - )

Education Business Bank

2. Click **Business**. The organization relationship screen appears.

**Organization Relationship for Chad Patterson**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

Org name: Ladd Furniture ID: 238 Aliases

Country: United States More... Industry: Position: Marketing Assistant Print? Profession: Manufacturing Income: \$40,000 - \$49,999 Relationship: Employer Reciprocal: Employee Date from: 2000 to

Address lines: City: State: ZIP: DPC:

☐ Print organization name with address

Phones/Email/Links			
DNC	Type	Number/Email Ad...	Shared?
	Business	404-977-1002	Not Shared
	Fax	404-633-7404	Not Shared

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

☒ Employee ☒ Primary business information

☐ Contact ☐ Do not mail to this contact

Contact type:

Press F7 for table lookup, F8 for AddressAccelerator

3. Select the General 2 tab.

**Organization Relationship for Chad Patterson**

File Edit View Relationship Help

Save and Close

General 1 General 2 Attributes/Notes

☒ Ladd Furniture matches gifts from Chad Patterson

Matching Gift Information

Factor: Fiscal year starts:

Matching Gift Limits		
	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

Notes:

☐ Automatically soft credit this organization for Gifts

MatchFinder

Press F7 to zoom

4. Click **MatchFinder**. The Open screen appears so you can search *MatchFinder* for the matching gift company.

Find: MatchFinder Records

Open Cancel Options Find Now New Search Expand Results

Find MatchFinder Records that meet these criteria:

Company name: Ladd Furniture

City: State:

☐ Exact match only

5. In the **Find Matchfinder Records that meet these criteria** frame, the organization's name automatically appears in the **Company name** field.
- Click **Find Now**. If the search criteria entered matches a company in the *MatchFinder* database, it appears in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find one or multiple records.

Company Name	Industry	Location	Parent
La-Z-Boy Inc (Ladd F...	Manufacturing	Greensboro, NC	

Find: MatchFinder Records

Open Cancel Options Find Now New Search Expand Results

Find MatchFinder Records that meet these criteria:

Company name: Ladd Furniture

City: State:

☐ Exact match only

1 record found.

6. In the grid, select the company whose record you want to open and click **Open**. The *MatchFinder* matching gift company record appears.

The screenshot shows a window titled "La-Z-Boy Inc (as of 07/12/2005)". It has several tabs: "Company", "Employee Restrictions", "Nonprofit Eligibility", "Rules", "Subsidiaries", and "Special Terms". The "Company" tab is active. The form contains the following fields:

- Company name: La-Z-Boy Inc
- Alias: Ladd Furniture
- Fund/Foundation: (empty)
- Fiscal year ends: (empty)
- Web address: www.lazyboy.com
- Industry: Manufacturing
- Status: Active
- Date: 2003

Below these are two sections: "Company Address" and "Contact".

**Company Address:**

- Address: 4620 Grandover Pkwy Box 26777
- City: Greensboro
- State: NC ZIP: 27417-6777
- Country: (empty)
- Phone: 336-315-4265 Ext: (empty)
- Fax: 336-315-4380

**Contact:**

- Last name: Sims
- First name: Bernita
- Middle name: (empty)
- Title/Suffix: Ms.
- Position: HR Generalist II
- E-mail: bernita.sims@la-z-boy.com

At the bottom are "Link" and "Cancel" buttons.

You cannot edit or change the company record. For information about the items on the *MatchFinder* matching gift company record, see "Matching Gift Company Record" on page 26.

In some cases, the *MatchFinder* company record you select to open may not have the same name of the *MatchFinder* company record that actually appears. This is because one company may have multiple subsidiaries. Subsidiaries are companies that are owned by or are a part of another company. For example, you select to open the *MatchFinder* record for Ladd Furniture. The *MatchFinder* record for La-Z-Boy Inc appears. The same matching gift company information exists for both companies because Ladd Furniture is listed as a subsidiary of La-Z-Boy on the Subsidiaries tab.

7. To create a link between the organization relationship record and the *MatchFinder* record, click **Link**. The Import From MatchFinder screen appears.

The screenshot shows a dialog box titled "Import From MatchFinder...". It contains a list of checkboxes for selecting information to import:

- ☐ Organization Name
- ☐ Industry
- ☐ Address
- ☐ Phone Number
- ☐ Fax Number
- ☐ Web Address
- ☒ Matching Gift Information
- ☐ Create Contact Relationship

At the bottom are "OK" and "Cancel" buttons.

8. In the list, mark the checkboxes for the information to import. For example, to import only the matching gift information for this *MatchFinder* record, mark **Matching Gift Information**.



9. Click **OK**. You return to the organization relationship record. The information you select to import from *MatchFinder* automatically appears in the applicable fields of the organization relationship record.

Organization Relationship for Chad Patterson

File Edit View Relationship Help

Save and Close Undo Redo ?

General 1 General 2 Attributes/Notes

☒ Ladd Furniture matches gifts from Chad Patterson

Matching Gift Information

Factor: 1.00 Fiscal year starts:

Matching Gift Limits	
	Minimum Maximum
Per gift	\$25.00 \$500.00
Annual per donor	\$1,000.00
Total per donor	

Notes:

☐ Automatically soft credit this organization for Gifts

MatchFinder

Press F7 to zoom

A link now exists between the two records, and you can click **MatchFinder** to view the *MatchFinder* record for the organization.

10. To save and close the record, click **Save and Close** on the toolbar.



► Break a link between an organization relationship and a MatchFinder record

**Scenario:** You create a link between a constituent's organization relationship and the company record in the *MatchFinder* database. You then realize that you mistakenly created a link for the wrong matching gift company. To fix this, open the organization relationship record and break the link to the matching gift company. This scenario is based on the link created in "Create a link between an organization constituent and a MatchFinder company record" on page 47.

1. From the constituent record, select the Bio 1 tab. For more information about accessing an organization constituent record, see "Access MatchFinder Information" on page 7. For more information about working with constituent records, see the *Constituent Data Entry Guide*.

The screenshot displays the MatchFinder software interface for a constituent record. The window title is "Chad Patterson". The menu bar includes File, Edit, View, Constituent, Letter, Favorites, Tools, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar, there are several tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The Bio 1 tab is currently selected.

The main form is divided into several sections:

- Biographical:** Includes fields for Last name (Patterson), First name (Chad), Middle name, Titles (Mr.), Suffixes, Nickname, Maiden name, Constituent ID (63), Gender (Male), SSN, Birth date (04/03/1975), Age (32), Marital status (Single), and Solicit code (Do not call after 9:00 PM).
- Preferred Address:** Includes Country (United States), Address lines (845 Heinz Street), City (Atlanta), State (GA), ZIP (30303), and DPC.
- Phones/Email/Links:** A table with columns for DNC, Type, Number/Email Address, and Shared?.
- This constituent:** A section with checkboxes for "Is inactive", "Is a solicitor", "Gives anonymously", "Has no valid addresses", and "Requests no email".

At the bottom of the form, there are buttons for Education, Business, and Bank, and a status bar indicating "Member (10/15/2000 -)".

DNC	Type	Number/Email Address	Shared?
	Home	404-257-9854	Shared

2. Click **Business**. The organization relationship screen appears.

The screenshot shows the 'Organization Relationship for Chad Patterson' window with the 'General 1' tab selected. The window contains various fields for organization and individual information.

**Org name:** Ladd Furniture **ID:** 238 **Aliases:** [button]

**Country:** United States **More...** [button] **Industry:** [dropdown]

**Address lines:** [text area] **Position:** Marketing Assistant **Print?** ☒

**City:** [text area] **Profession:** Manufacturing [dropdown]

**State:** [dropdown] **Income:** \$40,000 - \$49,999 [dropdown]

**ZIP:** [text area] **DPC:** [text area] **Relationship:** Employer [dropdown]

**Reciprocal:** Employee [dropdown] **Date from:** 2000 **to:** [text area]

☐ Print organization name with address

**Phones/Email/Links**

DNC	Type	Number/Email Ad...	Shared?
	Business	404-977-1002	Not Shared
	Fax	404-633-7404	Not Shared

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

☒ Employee ☒ Primary business information

☐ Contact ☐ Do not mail to this contact

**Contact type:** [dropdown]

Press F7 for table lookup, F8 for AddressAccelerator

3. Select the General 2 tab.

The screenshot shows the 'Organization Relationship for Chad Patterson' window with the 'General 2' tab selected. The window displays matching gift information and limits.

☒ Ladd Furniture matches gifts from Chad Patterson

**Matching Gift Information**

**Factor:** [text area] **Fiscal year starts:** [text area]

**Matching Gift Limits**

	Minimum	Maximum
Per gift		
Annual per donor		
Total per donor		

**Notes:** [text area]

☐ Automatically soft credit this organization for Gifts

**MatchFinder** [button]

Press F7 to zoom

- Click **MatchFinder**. The linked *MatchFinder* record appears.

**La-Z-Boy Inc (as of 07/12/2005)**

Company | Employee Restrictions | Nonprofit Eligibility | Rules | Subsidiaries | Special Terms

Company name: La-Z-Boy Inc

Alias: Ladd Furniture

Fund/Foundation:

Fiscal year ends:

Web address: www.lazyboy.com

Industry: Manufacturing

Status: Active

Date: 2003

**Company Address**

Address: 4620 Grandover Pkwy  
Box 26777

City: Greensboro

State: NC ZIP: 27417-6777

Country:

Phone: 336-315-4265 Ext:

Fax: 336-315-4380

**Contact**

Last name: Sims

First name: Bernita

Middle name:

Title/Suffix: Ms.

Position: HR Generalist II

E-mail: bernita.sims@la-z-boy.com

Break Link Cancel

- To break the link between the organization relationship record and the *MatchFinder* record, click **Break Link**. You return to the General 2 tab of the organization relationship record. The link between the two records is now broken.
- To search for a new *MatchFinder* record with which to create a link, click **MatchFinder**. For more information about how to create a link, see “Create a link between an organization relationship and a *MatchFinder* record” on page 53.
- To save and close the record, click **Save and Close** on the toolbar.

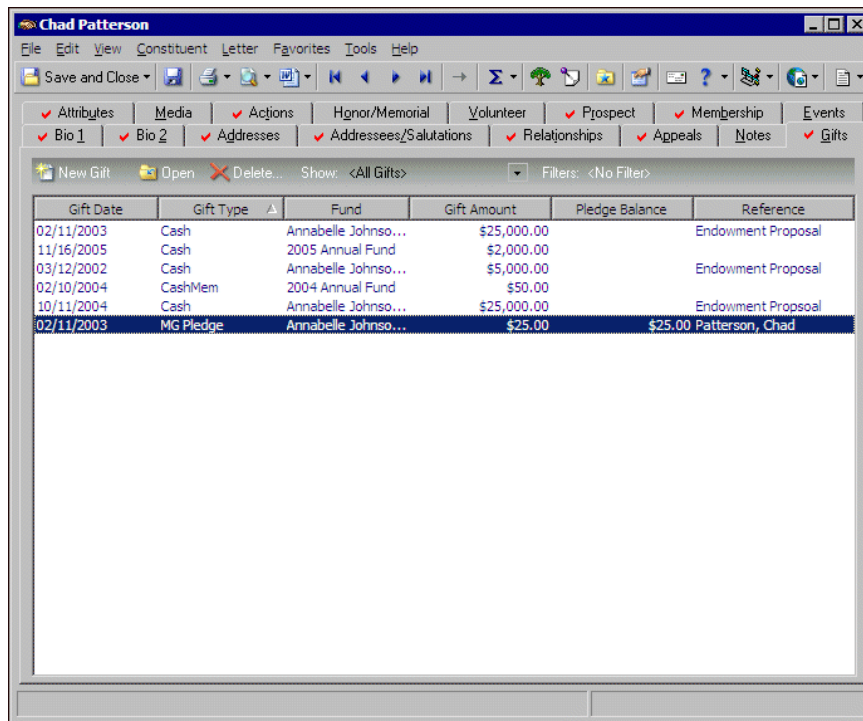
## Matching Gifts Tab

When a constituent’s gift record is linked to a *MatchFinder* record, you can view matching gift company information from the Matching Gifts tab of the gift record. From the Matching Gifts tab, you can open a matching gift and click the **MatchFinder** button to view information about the matching gift company. You cannot edit or add *MatchFinder* information from this tab. You can only view the records already linked. For more information about how to create links between records in *The Raiser’s Edge* and the *MatchFinder* database, see “Create and Break Links with *MatchFinder* Records” on page 46. For more information about the Matching Gifts tab, see the Matching Gifts chapter of the *Gift Records Guide*.

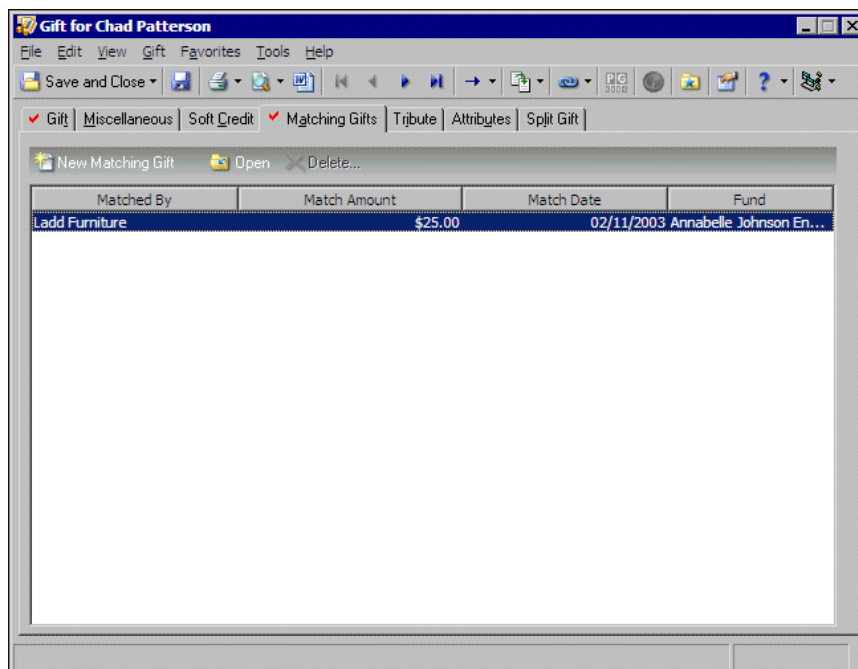
### ► View *MatchFinder* information from the Matching Gifts tab of a gift record

- From the constituent record, select the Gifts tab.

- In the grid, select the gift for which to view matching gift information. For more information about matching gift records, see the Matching Gifts chapter of the *Gift Records Guide*.



- On the toolbar, click **Open**. The gift record appears.
- Select the Matching Gifts tab.



5. In the grid, select the matching gift record to view and click **Open** on the action bar. The matching gift record appears.

**Matching Gift for Chad Patterson**

File Edit View Pledge Help

Save and Close

Matching Gift Company: Ladd Furniture ID: 238

	Min	Max
Gift amt	\$25.00	\$500.00
Annual amt	\$0.00	\$1,000.00
Total amt	\$0.00	\$0.00

Multiplication Factor: 1.000

Notes:

☒ Gift ☒ Miscellaneous ☐ Soft Credit ☐ Tribute ☐ Attributes ☐ Split Gift

Gift type: MG Pledge

Gift subtype:

Pledged on: 02/11/2003

Pledge amt: \$25.00

Campaign: Endowment Campaign

Fund: Annabelle Johnson Endowm

Appeal: Proposal Appeal

Package:

☒ Solicitor(s) Mary Beth Richardson

Reference: Patterson, Chad

Acknowledge: Not Acknowledged

Letter

Receipt: Not Receipted

Receipt amt/no.: \$25.00

☒ MatchFinder

6. Click **MatchFinder**. The linked *MatchFinder* record appears.

**La-Z-Boy Inc (as of 07/12/2005)**

Company Employee Restrictions Nonprofit Eligibility Rules Subsidiaries Special Terms

Company name: La-Z-Boy Inc

Alias: Ladd Furniture

Fund/Foundation:

Fiscal year ends:

Web address: www.lazyboy.com

Industry: Manufacturing

Status: Active

Date: 2003

**Company Address**

Address: 4620 Grandover Pkwy  
Box 26777

City: Greensboro

State: NC ZIP: 27417-6777

Country:

Phone: 336-315-4265 Ext:

Fax: 336-315-4380

**Contact**

Last name: Sims

First name: Bernita

Middle name:

Title/Suffix: Ms.

Position: HR Generalist II

E-mail: bernita.sims@la-z-boy.com

OK

7. Click **OK**. You return to the matching gift record.

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