

The Raiser's EdgeTM

Prospect Data Entry Guide

020112

©2010 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

The Raiser's Edge, MatchFinder, ParaGon, RE:Alum, RE:Event, RE:Member, RE:Queue, RE:Tribute, RE:Volunteer, RE:Zip, RE:Open, and Blackbaud are registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7-Prospect-2012

Contents



| | |
|--|----|
| WHAT IS IN THIS GUIDE? | v |
| PROSPECT INFORMATION. | 1 |
| Navigating on the Prospect tab | 3 |
| Accessing the Prospect Tab | 6 |
| User Options for the Prospect Tab | 8 |
| Business Rules for the Prospect Tab | 9 |
| Integration with ResearchPoint | 9 |
| Prospect Tab Categories | 10 |
| Linking Proposals to Gifts | 61 |
| Available Prospect Reports | 65 |
| GLOSSARY | 67 |
| INDEX | 71 |

What Is In This Guide?



In the *Prospect Data Entry Guide*, you learn to add, edit, and delete prospect records. This guide includes the following information and much more.

- “Prospect Tab Categories” on page 10
- “Tracking Prospect Donor Ratings” on page 54
- “Linking Proposals to Gifts” on page 61
- “Breaking the Link between a Gift and a Proposal” on page 63

How Do I Use These Guides?

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

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

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

Help File. In addition to user guides, you can learn about **The Raiser’s Edge 7** by accessing the help file in the program. Select **Help, The Raiser’s Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

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

Prospect Information

| | |
|---|-----------|
| Navigating on the Prospect tab | 3 |
| Buttons | 4 |
| Toolbar | 5 |
| Accessing the Prospect Tab | 6 |
| User Options for the Prospect Tab | 8 |
| Business Rules for the Prospect Tab | 9 |
| Prospect Tab Categories | 10 |
| General | 11 |
| Gifts to other Organizations | 14 |
| Financial Information | 17 |
| Financial Information Graph | 20 |
| Proposal | 27 |
| Opening a Proposal Record | 31 |
| Entering a New Proposal | 34 |
| Editing the Original Amount/Date Asked on a Proposal Record | 53 |
| Tracking Prospect Donor Ratings | 54 |
| Opening an Existing Rating from the Prospect Tab | 55 |
| Entering Prospect Ratings Information | 57 |
| Viewing a Chronology of Prospect Information | 60 |
| Linking Proposals to Gifts | 61 |
| Breaking the Link between a Gift and a Proposal | 63 |
| Available Prospect Reports | 65 |

Procedures

| | |
|--|----|
| Accessing the Prospect tab of a constituent record | 7 |
| Setting individual constituent records to open displaying the Prospect tab | 8 |
| Setting organization constituent records to open displaying the Prospect tab | 9 |
| Completing the General category on the Prospect tab | 12 |
| Completing the Gifts to other Organizations category on the Prospect tab | 15 |
| Creating/opening a new financial information record | 17 |
| View/print financial information graph | 20 |
| Creating a customized graph | 21 |
| Opening an existing proposal record | 32 |
| Completing the General tab on the proposal record | 35 |
| Adding actions to the Action tab of a proposal record | 39 |
| Adding information to the Media tab in Proposals | 47 |
| Adding Attribute information to the Attributes tab in Proposals | 50 |
| Adding Notes to the Notes tab in Proposals | 52 |
| Editing the Original Amount/Date Asked | 54 |

| | |
|--|----|
| Opening an existing rating from the Prospect tab | 55 |
| Manually entering prospect ratings | 57 |
| Linking a proposal to a new gift record | 61 |
| Breaking the link between a gift and a proposal from the proposal record | 64 |

Note: For information about Target Analytics services, see the *Target Analytics Guide*.

Prospect Research Management, Blackbaud's prospective and major donor management module, works in conjunction with **The Raiser's Edge 7** to help you explore and track all potential givers.

If you have this module, a Prospect tab appears in the constituent record. With the functions available on the Prospect tab, you can track gifts made by prospective donors to other organizations; record financial information, such as sources of wealth, annual income, and real estate holdings; and enter information about prospects' philanthropic interests. You can also track your organization's proposals, including amounts solicited, amounts funded, ratings data, and even enter extensive notes. For more information about all the functions available on the Prospect tab, see "Prospect Tab Categories" on page 10.

In addition, if you subscribe to Target Analytics services, the Prospect tab stores all information rating your prospect's giving potential. You download this information from the Target Analytics server into the **Ratings** category on the Prospect tab. No data entry is required.

Target Analytics service identifies your best charitable giving prospects. The service examines historical and current data, as well as behavioral trends. You learn which individuals are your best annual, major, and planned giving prospects now and in the future.

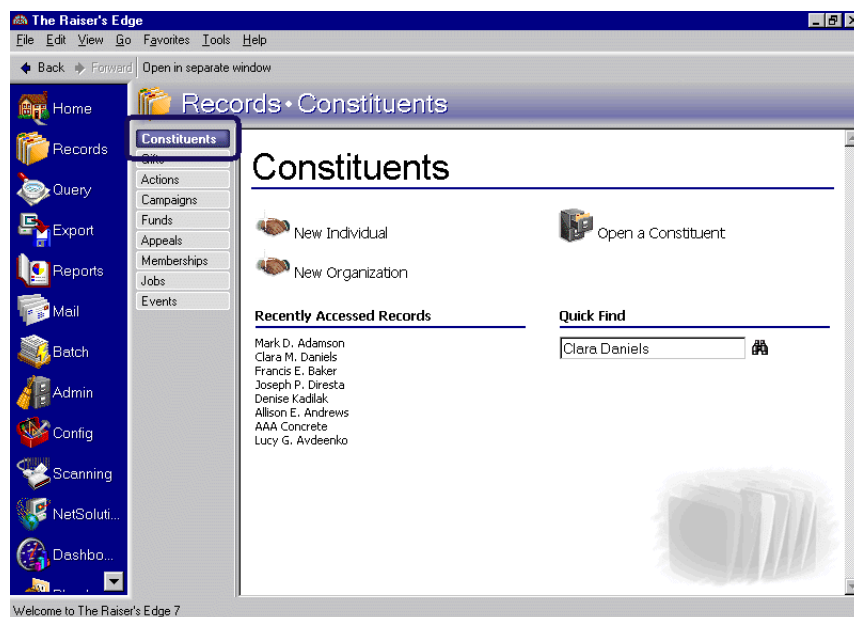
Finally, with *Prospect Research Management*, you can use the data entered in the program to generate several prospect research reports. These reports can include lists of proposals presented to potential donors but still outstanding, the number of days a proposal has been open, actions taken after a proposal is opened, and much more. For more information about Prospect Research Reports, see the *Reports Guide*. For a sample of each report, see the *Sample Reports Guide*.

Navigating on the Prospect tab

Note: For information on constituent records, see the *Constituent Records Guide*.

To access the Prospect tab, you must first open or create the constituent record. All record types are stored in *Records*. From *Records* on the Raiser's Edge bar, you can access several record types, including constituent records.

Select *Records* from the Raiser's Edge bar and then click the **Constituents** link. The Constituents page appears.



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

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

Once you open an constituent record, select the Prospect tab to enter prospect information for your constituents.

Sean A. Davenport

File Edit View Constituent Letter Favorites Tools Help

Save and Close Print Find Navigation

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

New Proposal Open Delete...

General
Gifts to other Organizations
Financial Information
Financial Information Graph
Proposal
Ratings
Chronology

Last proposal: 11/04/2000 Last action: 12/09/2004
Amount asked: \$30,000.00 Last gift: 11/28/2005
Amount funded: \$30,000.00 Total given: \$4,050.00

Classification: Individual
Prospect status: Cultivation

| Philanthropic Interests | Comments |
|-------------------------|--------------------------------|
| Cancer Research | Gave to children's wing at NGH |

| Will Not Give To | Comments |
|-------------------|-----------------------|
| General Operating | Likes to target gifts |

09/20/2002

On this tab, you can track prospective donors. You can enter information about their giving history; financial data you collected; proposals detailing how you intend to win a donation from this constituent; and rating information. You can also graph financial information.

For more information about all the functions available on the Prospect tab, see “Prospect Tab Categories” on page 10.

Buttons

The Prospect tab has three standard buttons to help you navigate through the program. For information about other buttons available in a constituent record, see “Toolbar” on page 5.



Opens the New Proposal screen, where you can enter a new constituent proposal (**New Financial Information** and **New Ratings** can be accessed from the down arrow beside **New Proposal**. Use **New Financial Information** to enter a new financial information record and **New Ratings** to enter a new ratings record.)



Opens a selected Prospect tab record

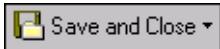


Deletes a selected record from the Prospect tab

Toolbar

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

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



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



Save the record and keep the record open



Print the record



Preview the record before printing



Write a letter in Microsoft *Word*



Go to the first constituent record



Go to the previous constituent record



Go to the next constituent record



Go to the last constituent record



Go to records associated with this constituent record



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



View relationships for this constituent



Make an annotation



Open the Properties screen



Add this constituent record to your Favorites



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



Access **Address Validation**



Create and edit macros to create shortcuts for functions you perform repeatedly in ***The Raiser's Edge***. This toolbar button is available only if you have *VBA*.



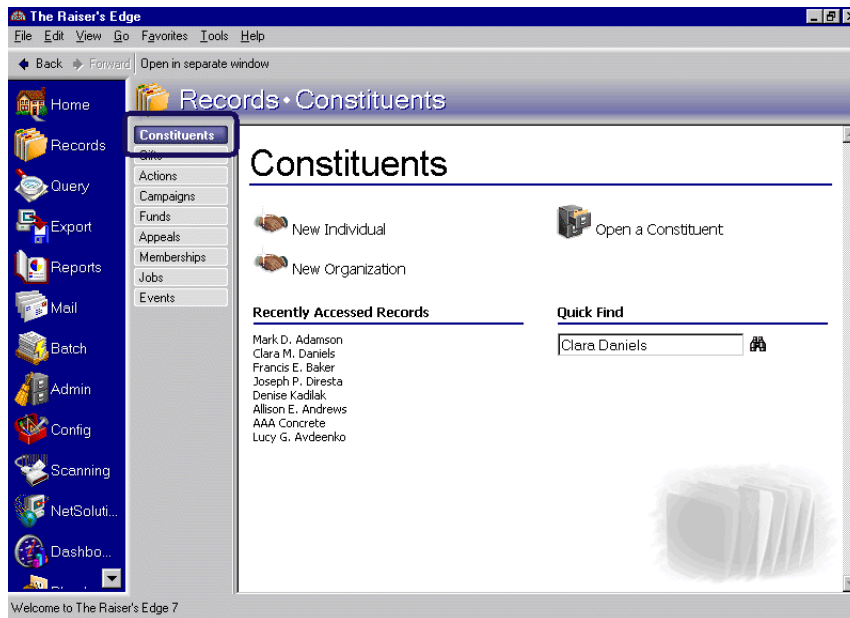
Access **Custom View**

Accessing the Prospect Tab

You access the Prospect tab from a constituent record. Open the constituent record from the Constituents page of *Records*, and if you have *Prospect Research Management*, the Prospect tab is one of the many tabs available on the record.

► **Accessing the Prospect tab of a constituent record**

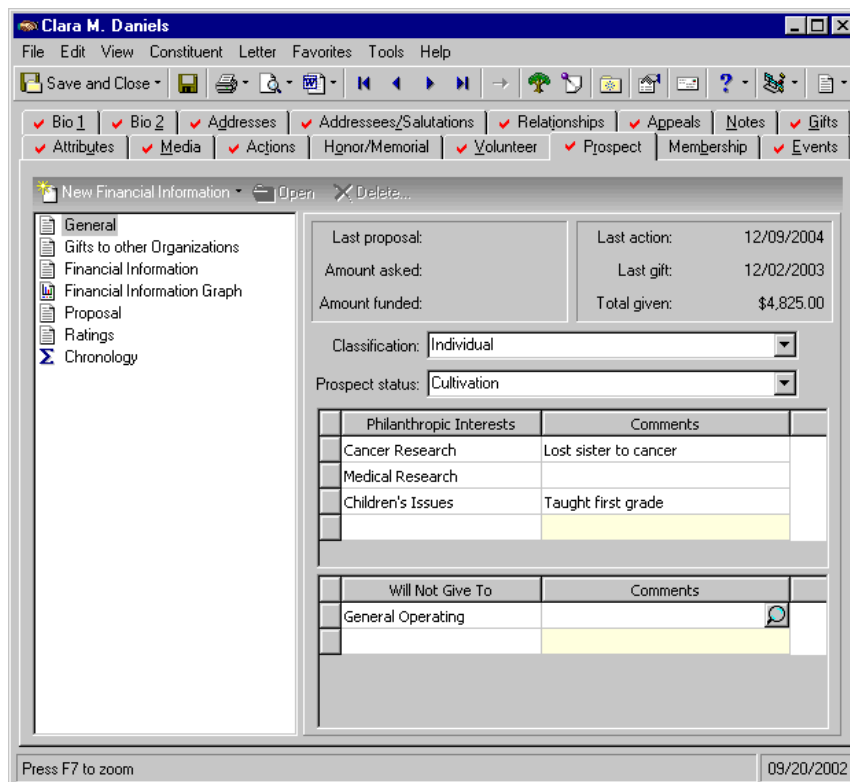
1. From the Raiser's Edge bar, select *Records*. The Constituents page appears.



2. Open or create the constituent record in which you want to enter prospect information.

Note: For information about opening a constituent record, see the Introduction to Constituent Records chapter in the *Constituent Records Guide*.

3. Select the Prospect tab.



4. You arrange information on this tab based on six categories: **General**, **Gifts to other Organizations**, **Financial Information**, **Financial Information Graph**, **Proposal**, and **Ratings**.

Note: For information the categories available on the Prospect tab, see “Prospect Tab Categories” on page 10.

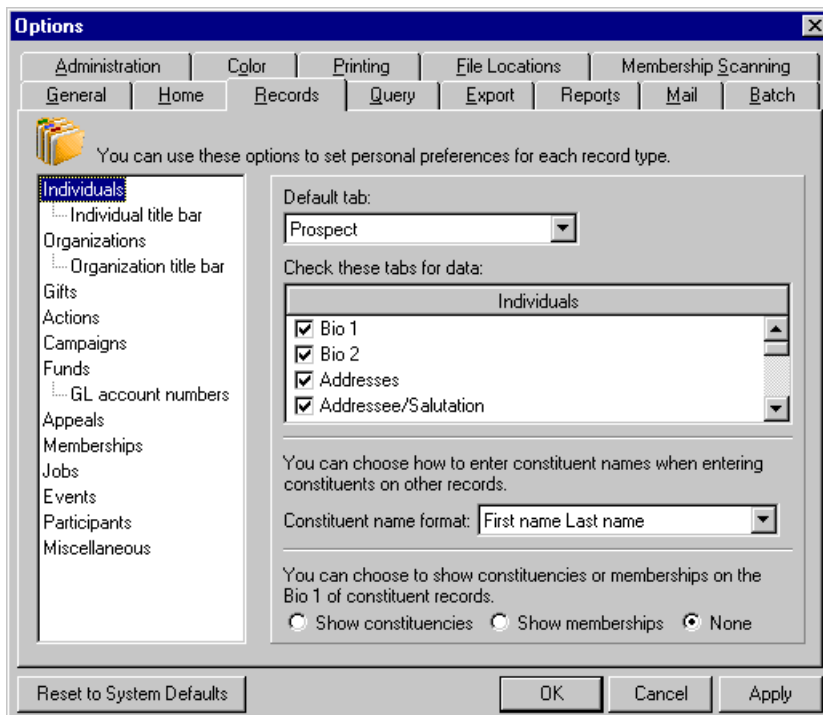
5. Click the **Chronology** category to view action, event, appeal, gift, and proposal information associated with the prospect in chronological order.
6. After adding or editing the prospect information, click **Save and Close** on the toolbar. You return to the Constituents page.

User Options for the Prospect Tab

User options are preferences you set that affect how *The Raiser’s Edge* looks and runs on your workstation. User options are login-specific, which means if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. For example, if you work most often on the Prospect tab, you may want constituent records to open displaying this tab instead of the default Bio 1 tab. Using User Options, you can do this.

► Setting individual constituent records to open displaying the Prospect tab

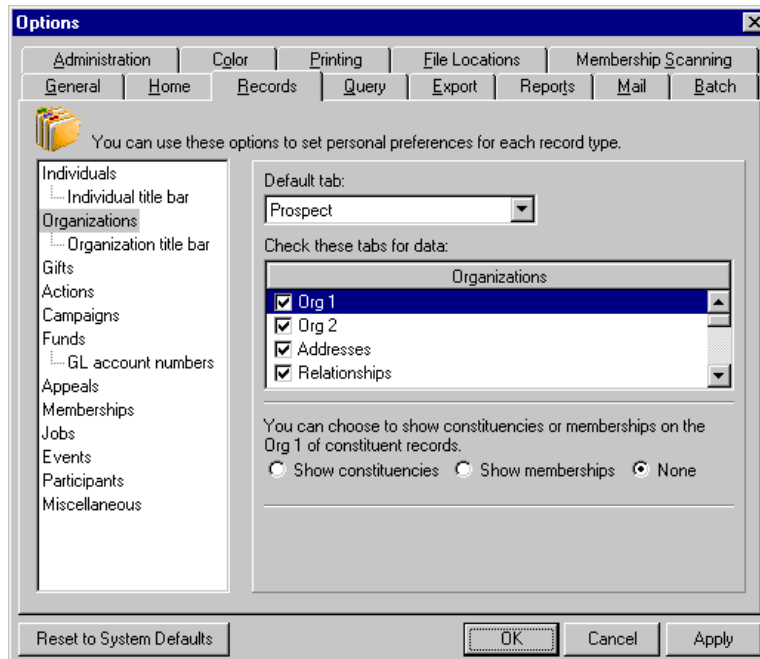
1. From the menu bar on the shell of *The Raiser’s Edge*, select **Tools, User Options**. The Options screen appears, displaying the Records tab.



2. From the treeview on the left, select **Individuals**. The Individual Constituent user option selections appear on the right.
3. In the **Default tab** field, select **Prospect**.
4. To apply your changes, click **Apply**, or to save your changes and close the Options screen, click **OK**.

► **Setting organization constituent records to open displaying the Prospect tab**

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



2. From the treeview on the left, select **Organizations**. The Organization Constituent user option selections appear on the right.

Note: For more information about user options, see the User Options chapter of the *Program Basics Guide*.

3. In the **Default tab** field, select Prospect.
4. To apply your changes, click **Apply**, or to save your changes and close the Options screen, click **OK**.

Business Rules for the Prospect Tab

Unlike user options, business rules affect all workstations using *The Raiser's Edge*. You can set business rules from the **Security** link of *Administration*.

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

Integration with ResearchPoint

Users of the standalone version of *ResearchPoint* (not integrated with Blackbaud's *Constituent Record Management* system) and *The Raiser's Edge* version 7.84 or higher can integrate the two applications and simplify constituent management duties between the two application databases.

The integration feature located in **ResearchPoint** links records included in both databases and synchronizes the information included on both records. You can also open **Raiser's Edge** records from **ResearchPoint** and **ResearchPoint** records from **The Raiser's Edge**. Once the applications are linked, a **View in ResearchPoint** button appears on the Prospect tab, allowing you to access the constituent's linked record in **ResearchPoint**.

For instructions on integration configuration, see the Raiser' Edge Integration chapter in the **ResearchPoint** documentation - *Prospect and Wealth Information Management Guide*.

Prospect Tab Categories

The Raiser's Edge organizes prospect information using six categories: **General**, **Gifts to other Organizations**, **Financial Information**, **Financial Information Graph**, **Proposal**, and **Ratings**. The tab also includes a **Chronology** category that displays proposal information for select record types.

| Philanthropic Interests | Comments |
|-------------------------|-----------------------|
| Cancer Research | Lost sister to cancer |
| Medical Research | |
| Children's Issues | Taught first grade |
| | |

| Will Not Give To | Comments |
|-------------------|----------|
| General Operating | |
| | |

The categories appear in the list on the left side on the Prospect tab. When you select a category, the right side of the screen changes, displaying fields, checkboxes, options, and grids specific to the selected category. For example, if you select the **Gifts to other Organizations** category, the right side of the screen displays a grid listing all gifts the constituent gave to other organizations, including the organization name, gift amount, gift date, reason for the gift, and any comments.

General

To enter general information about prospects, including classification, status, philanthropic interests, and areas to which they will not give, select the **General** category.

| Philanthropic Interests | Comments |
|-------------------------|-----------------------|
| Cancer Research | Lost sister to cancer |
| Medical Research | |
| Children's Issues | Taught first grade |

| Will Not Give To | Comments |
|-------------------|----------|
| General Operating | |

The top of this screen displays information from the constituent's most recent proposal record, created using the **Proposal** category of the Prospect tab.

Proposal display. The top section of the **General** category screen displays information entered in the constituent's most recent proposal record. All the information is taken from the corresponding fields in the proposal record. For example, the **Amount asked**, is taken from the **Amount asked** field on the proposal record. For information about each field on the proposal record, see "Proposal" on page 27.

Classification. **Classification** identifies and classifies prospects and varies from organization to organization. Individual, Corporate, Organization, and Major Donor are a few prospect **Classification** an organization may use. You establish **Classification** options from the **Classifications** category of **Tables** in *Configuration*. For information about **Tables**, see the Tables section of the Configuration chapter in the *Configuration & Security Guide*.

Prospect status. **Prospect status** tells you where a prospect is in the solicitation process and varies from organization to organization. Accepted, Active, Cultivation, Pending, Rejected, and Solicited are a few **Prospect status** options an organization may use. You establish **Prospect status** options from **Prospect Status** category of **Tables** in *Configuration*. For information about **Tables**, see the Tables section of the Configuration chapter in the *Configuration & Security Guide*.

Philanthropic Interests grid. **Philanthropic Interests** shows you the philanthropic areas in which a prospect has displayed an interest. Cancer Research, Medical Research, Children's Issues, Conservation, and Environment are a few **Philanthropic Interests** options an organization may use. This grid holds an unlimited number of interests. You can also enter any comments about the interest in the **Comments** column.

You establish **Philanthropic Interests** options from the **Prospect Interests** category of **Tables** in *Configuration*. For information about **Tables**, see the Tables section of the Configuration chapter in the *Configuration & Security Guide*.

Will Not Give To grid. **Will Not Give To** shows you the philanthropic areas to which a prospect has refused to donate. General Operations, Conservation, and Environment are a few **Will Not Give To** options an organization may use. This grid holds an unlimited number of options. You can also enter any comments about the option in the **Comments** column.

You establish **Will Not Give To** options from the **Prospect Interests** category of **Tables** in *Configuration*. For information about **Tables**, see the Tables section of the Configuration chapter in the *Configuration & Security Guide*.

► Completing the General category on the Prospect tab

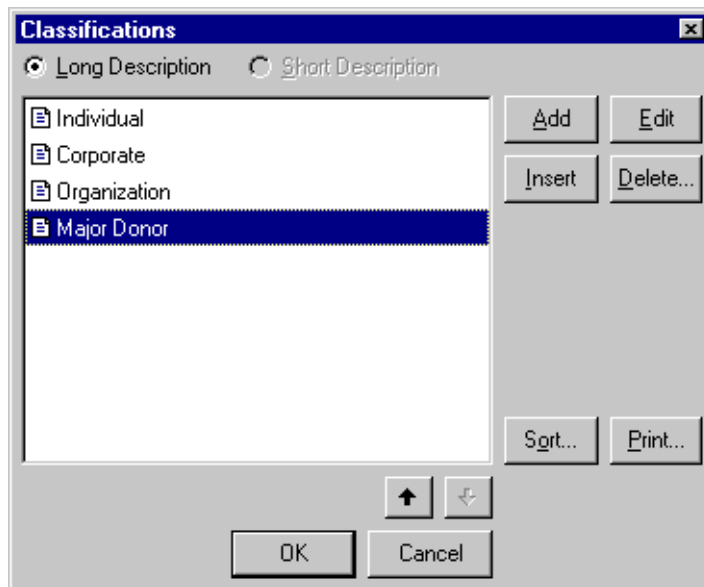
Note: For more information about opening a constituent record, see “Accessing the Prospect tab of a constituent record” on page 7

1. Open the constituent record.
2. Select the Prospect tab.
3. From the list on the left, select **General**.

Note: For information on creating table entries, please see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

4. On top of the right side, proposal information, if any exists, displays.
5. Also, on the right side, select a **Classification**. The options available depend on the Classifications you entered in the **Tables** link in *Configuration*. For example, you can enter Individual, Corporate, or Major Donor as **Classification** options.

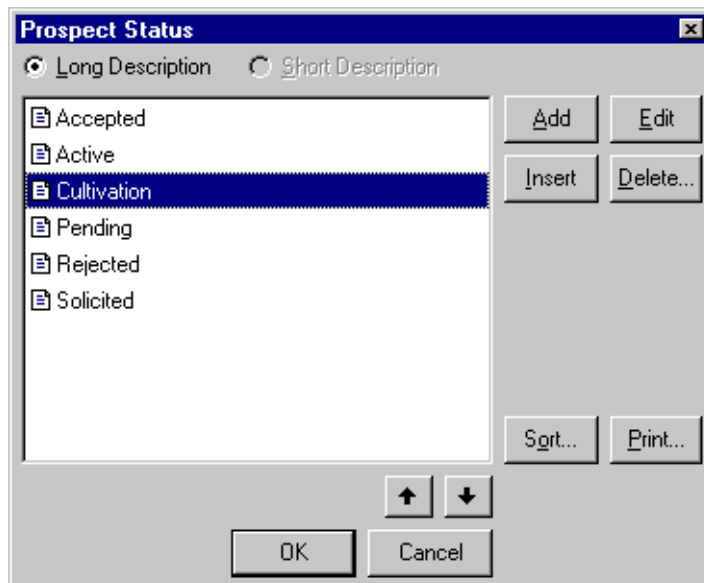
If you want a **Classification** that does not exist, click on the **Classification** field name. The Classifications screen appears.



From this screen, you can **Add**, **Edit**, **Insert**, or **Delete** a table entry. You can also **Sort** entries and **Print** a copy of the table entries. Use the arrows to move a selected entry up or down in the list.

6. Next on the Prospect tab, select a **Prospect status**. The options available depend on the **Prospect Status** options you entered in the **Tables** link in *Configuration*. For example, you can enter Accepted, Pending, and Cultivation as **Prospect status** options.

If you want a **Prospect status** that does not exist, click on the **Prospect status** field name. The Prospect Status screen appears.



Note: For information about table entries, please see the Configuration chapter in the *Configuration & Security Guide*.

From this screen, you can **Add**, **Edit**, **Insert**, or **Delete** a table entry. You can also **Sort** entries and **Print** a copy of the table entries. Use the arrows to move a selected entry up or down in the list.

- Next on the Prospect tab, complete the **Philanthropic Interests** grid. The options available in the **Philanthropic Interest** column depend on the interests you entered in the **Prospect Interests** category of **Tables** in *Configuration*. For example, you can enter Environment, Children's Issues, Cancer Research, AIDs Research, and Conservation.

Under **Comments**, enter any additional information.

Note: If you have security rights to add table entries, new entries can also be added "on the fly." Simply place your cursor in the field and type the new entry.

- In the **Will Not Give To** grid, select the areas to which you know the constituent will not give. The options available in the **Will Not Give To** column depend on the interests you entered in the **Prospect Interests** category of **Tables** in *Configuration*. For example, you can enter Environment, Children's Issues, Cancer Research, AIDs Research, and Conservation.
- After you complete the **General** category on the Prospect tab, you can select another category, or click **Save and Close** on the toolbar to save your entries and return to the Constituents page.

Gifts to other Organizations

You can enter information about gifts you know a prospect donated to other organizations, including the organization name, the type of organization, gift amount, gift date, reason for the gift, and any comments in the **Gifts to other Organizations** category.

| Organization Name | Organization Type | Amount | Date Given |
|------------------------|-------------------|-------------|------------|
| Charleston Developm... | Youth Development | \$5,000.00 | 05/09/2002 |
| Star Mission Shelter | Education | \$10,000... | 10/10/2002 |
| Elohim Synagogue | Religion | \$4,000.00 | 12/12/2002 |

Note: For more information about the Open screen, see the Program Basics chapter in the *Program Basics Guide*.

Gifts to other Organizations grid. To include an organization in this grid, click the binoculars in the **Organization Name** column. The Open screen appears, and you must locate and select the organization constituent record you want to include. If the organization does not exist in your database, you can enter it in the grid.

Note: For more information about creating a constituent record, see the Constituent Record chapter in the *Constituent Data Entry Guide*.

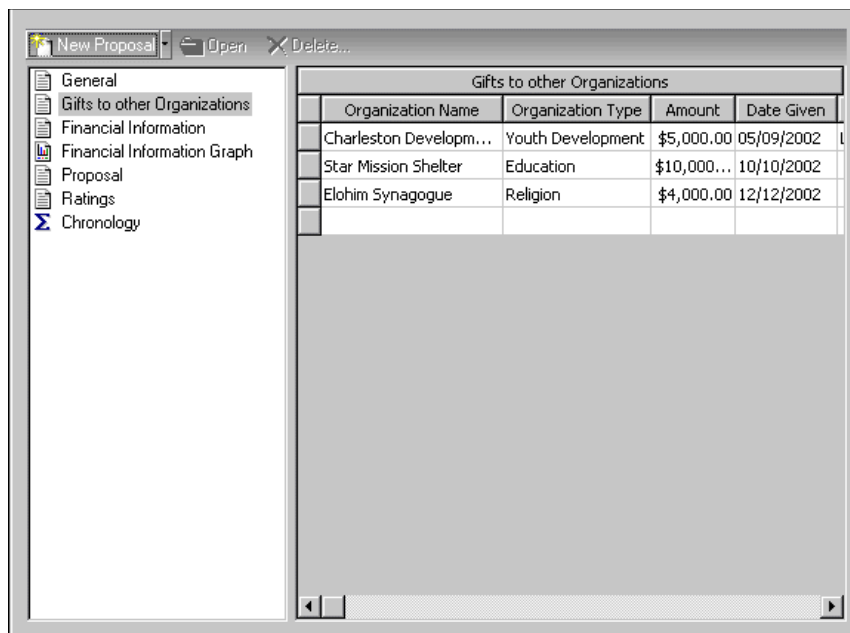
Indicate the type of organization to which a prospect has given in the past in the **Organization Type** column. Medical, Education, Environmental, and Youth Development are a few examples of organization types. You establish **Organization Type** options from the **Organization Type** category of **Tables** in *Configuration*. For information about **Tables**, see the Tables section of the Configuration chapter in the *Configuration & Security Guide*.

You can also enter the **Amount** of the gift, the **Date Given**, the **Reason** for the gift, and any **Comments**.

► **Completing the Gifts to other Organizations category on the Prospect tab**

Note: For more information about opening a constituent record, see “Accessing the Prospect tab of a constituent record” on page 7

1. Open a constituent record.
2. Select the Prospect tab.
3. From the list on the left, select **Gifts to other Organizations**.



Note: If the organization is not already a constituent in your database, you must add the organization as a new constituent. For information about adding new constituent records, see the *Constituent Data Entry Guide*.

4. In the **Gifts to other Organizations** grid, select the **Organization Name**. Click the binoculars to access the Open screen.

Open

Find: Organization Search using query: <Default>

| Org | Address Block | City, State | Constituent ID |
|------------------------|-------------------|--------------|----------------|
| North General Hospital | 2659 Moses Street | Hartford, CT | NGH |

Find Organizations that meet these criteria:

Org name: north City: Constituent ID: State: ZIP:

☒ Display inactive constituents
☐ Check aliases
☐ Exact match only

1 record found.

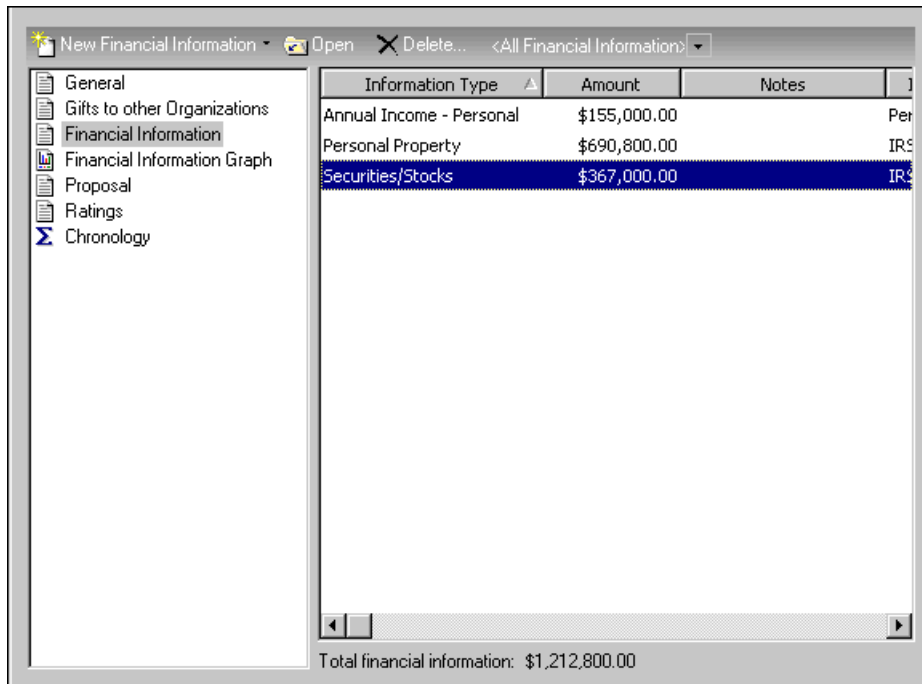
You can search for the organization in your database. If you find the organization, select it, and click **Open**. For more information about the Open screen, see the Program Basics chapter in the *Program Basics Guide*.

Note: For information on creating table entries, please see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

5. On the Prospect tab, in the **Organization Type** column, select the type of organization to which the prospect gave. You define **Organization Types** in the **Organization Type** category of **Tables in Configuration**. For example, you can enter Medical, Educational, or Environmental.
6. In the **Amount** column, enter the amount the prospect gave to the organization.
7. In the **Date Given** column, enter when the gift was donated to the organization.
8. In the **Reason** column, enter why the prospect donated to the organization. For example, enter "Cancer Wing".
9. You can enter any **Comments** you want recorded about the gift.
10. After you complete the **Gifts to other Organizations** category on the Prospect tab, you can select another category, or click **Save and Close** on the toolbar to save your entries and return to the Constituents page.

Financial Information

You can enter financial information about your prospect such as real estate and stock holdings, income, and personal property in the **Financial Information** category.



The right side of the screen displays all existing **Financial Information** records. From this screen, you can **Open** an existing record, **Delete** a record, or create a **New Financial Information** record.

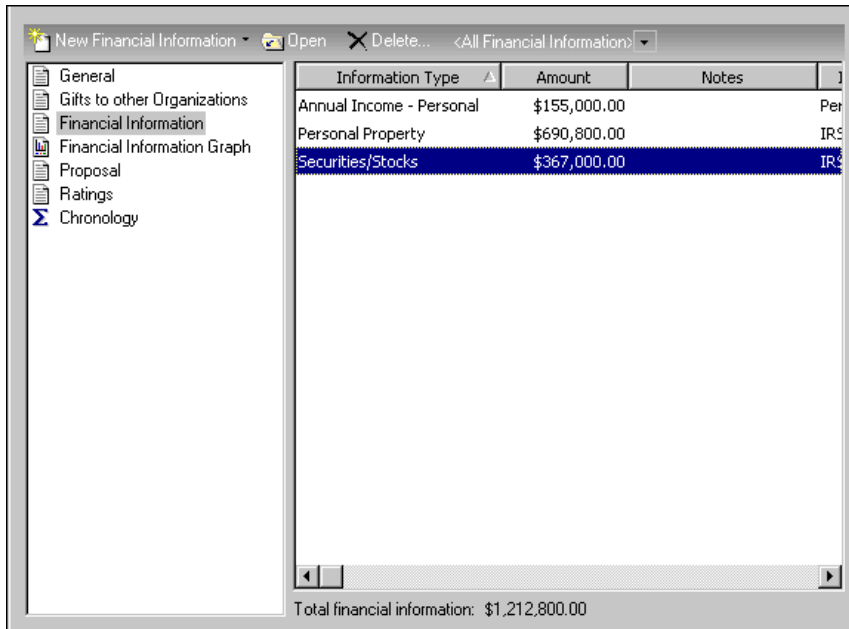
Financial Information grid. This grid displays information entered on the constituent financial information record. It includes a description of the information (Salary, Inheritance, Bonus), the amount, any notes, and the source of the information (tax records, articles, personal contact). You enter this information on the financial information record, accessed by clicking the **New Financial Information** button from the Prospect tab.

► Creating/opening a new financial information record

Note: For more information about opening a constituent record, see "Accessing the Prospect tab of a constituent record" on page 7

1. Open a constituent record.
2. Select the Prospect tab.

3. From the list on the left, select **Financial Information**.



4. Any existing financial information records appear on the right side of the screen. To open a record, select it and click **Open**.

To create a new financial information record, on the action bar, click **New Financial Information**. The New Financial Information screen appears.

New Financial Information for Mark D. Adamson

File Edit View Financial Information Help

Save and Close

Information type: Annual Salary

Amount: \$145,000.00

Info source: IRS/Tax Filings

Date acquired: 05/09/2002 Date assessed: 05/09/2002

Notes: This amount does not include salary bonus.

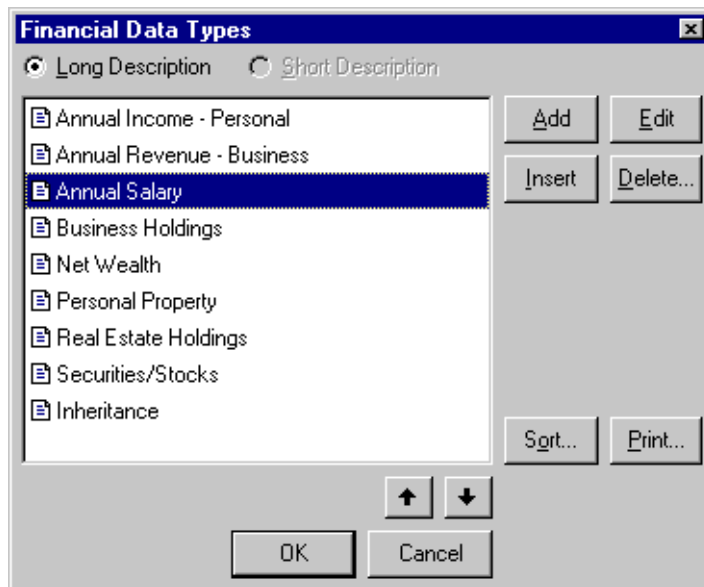
Press F7 to zoom

Note: For information on creating table entries, please see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

5. In the **Information type** field, enter or select the type of financial information you are recording. You define **Information type** options in the **Financial Data Types** category of **Tables** in *Configuration*. For example, you can enter Net Wealth, Annual Income - Personal, Annual Salary, and Personal Property.

Note: If you have security rights to add table entries, new entries can also be added “on the fly.” Simply place your cursor in the field and type the new entry.

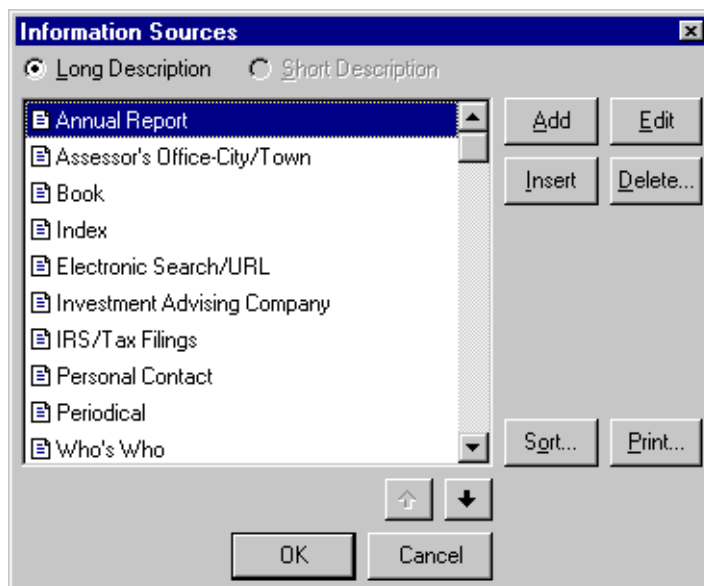
If you want an **Information type** that does not exist, click on the **Information type** field name. The Financial Data Types screen appears.



From this screen, you can **Add**, **Edit**, **Insert**, or **Delete** a table entry. You can also **Sort** entries and **Print** a copy of the table entries. Use the arrows to move a selected entry up or down in the list.

6. Next on the Financial Information screen, enter the dollar amount of the **Information Type** in the **Amount Field**. For example, if you are entering financial information about the constituent's annual salary, enter his salary amount in this field.
7. In the **Info Source** field, enter or select where you got this information. You define **Info Source** options in the **Information Sources** category of **Tables** in *Configuration*. For example, you can enter Annual Report, Article, and Tax Record.

If you want an **Info source** that does not exist, click on the **Info source** field name. The Information Source screen appears.



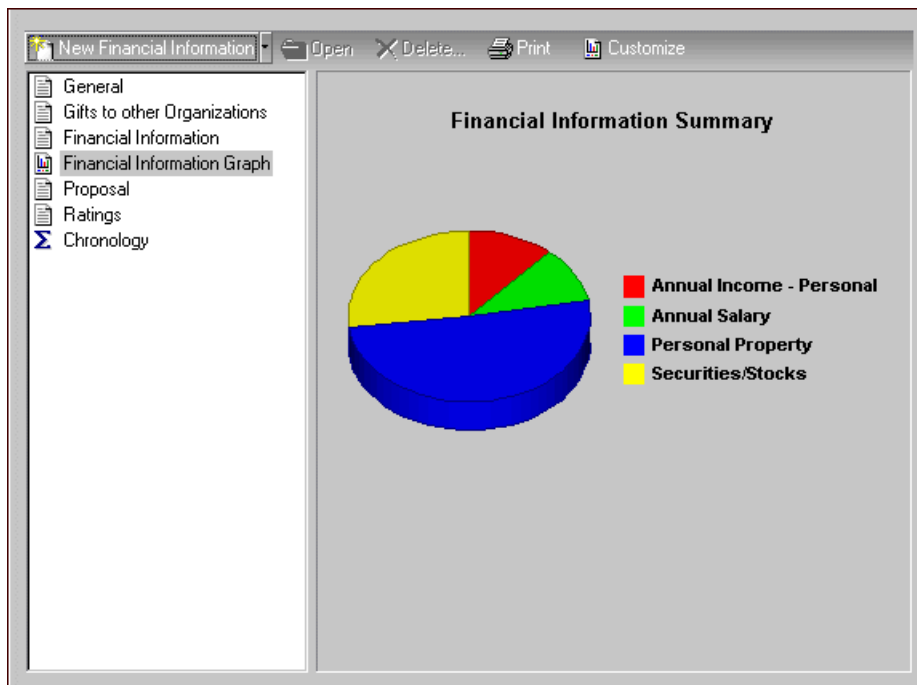
Note: For information about table entries, please see the Configuration chapter in the *Configuration & Security Guide*.

From this screen, you can **Add**, **Edit**, **Insert**, or **Delete** a table entry. You can also **Sort** entries and **Print** a copy of the table entries. Use the arrows to move a selected entry up or down in the list.

8. Next on the Financial Information screen, enter the date you received this financial information in the **Date acquired** field.
9. If your organization assess or rates financial information, you can enter the **Date assessed**.
10. In the **Notes** box, you can enter any additional information you want to include with the record. For example, you can enter, “This amount does not include salary bonus”, so you have a better idea of what all is included in this financial record.
11. To return to the Prospect tab and save this financial information record, click **Save and Close**.
12. Select another category, or click **Save and Close** from the toolbar on the Prospect tab to save your entries and return to the Records screen.
13. After you complete the **Financial Information** category on the Prospect tab, you can select another category, or click **Save and Close** on the toolbar to save your entries and return to the Constituents page.

Financial Information Graph

You can view a summary of a prospect’s **Financial Information** data in one of several graph formats. You can even **Customize** your graph, selecting a graph type, data source, and much more.

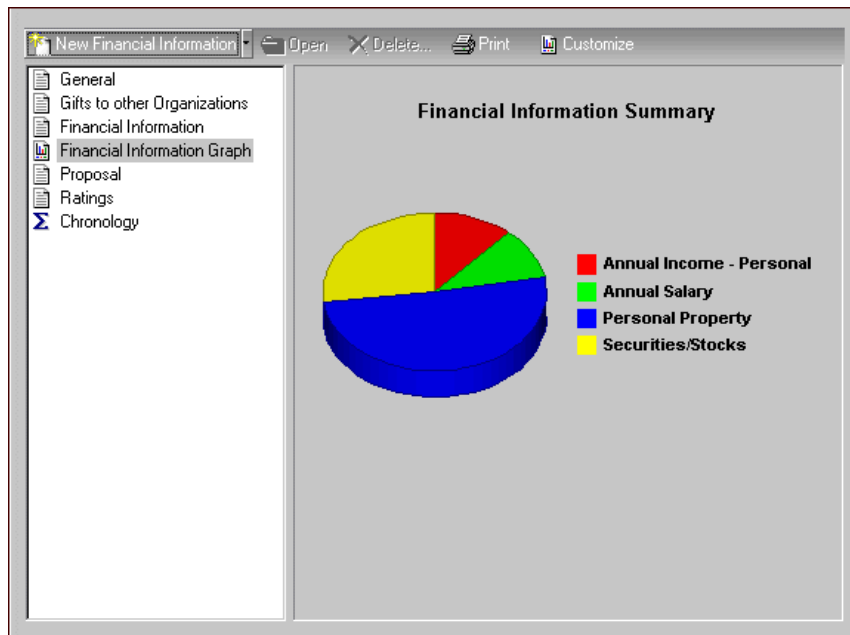


► View/Print financial information graph

Note: For more information about opening a constituent record, see “Accessing the Prospect tab of a constituent record” on page 7

1. Open a constituent record.
2. Select the Prospect tab.

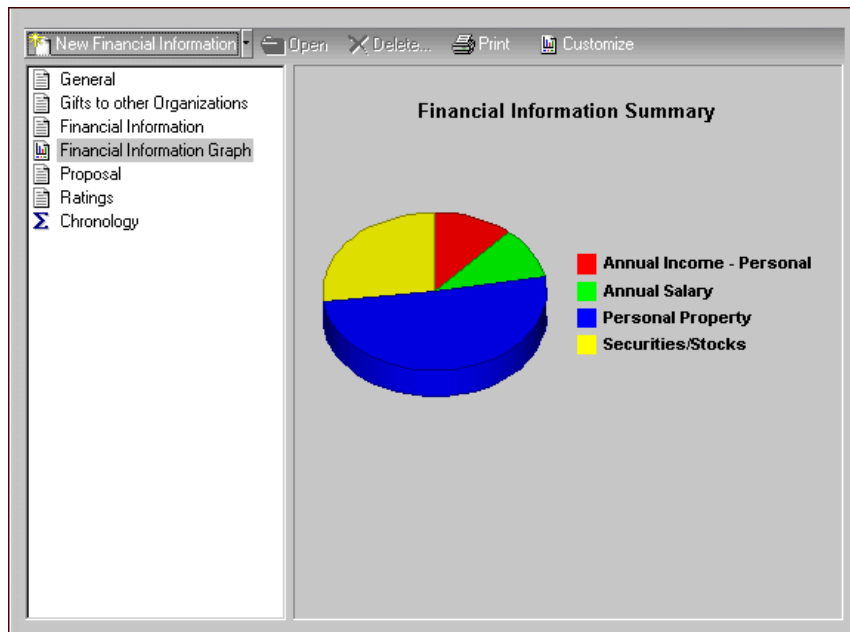
3. From the list on the left, select **Financial Information Graph**. A graph summarizing the prospect's financial information appears on the right.



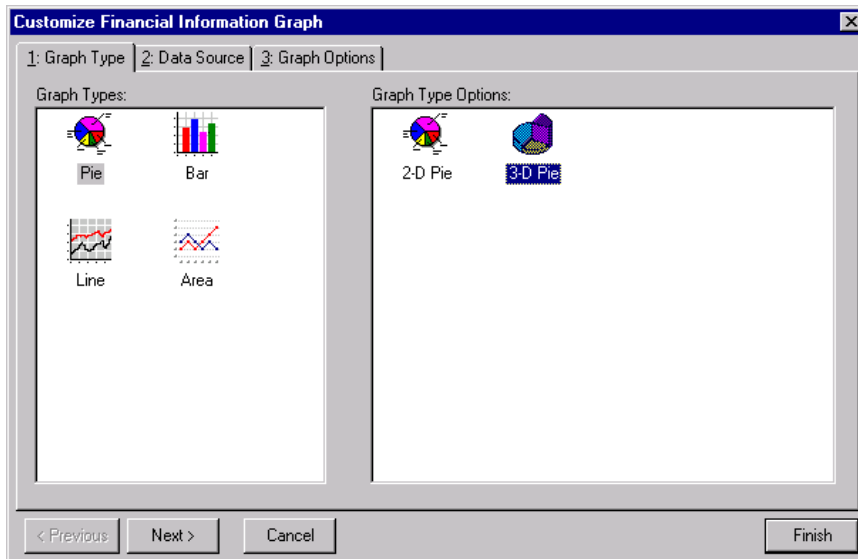
4. From this screen you can click **Print** on the action bar to print the graph.

► **Creating a customized graph**

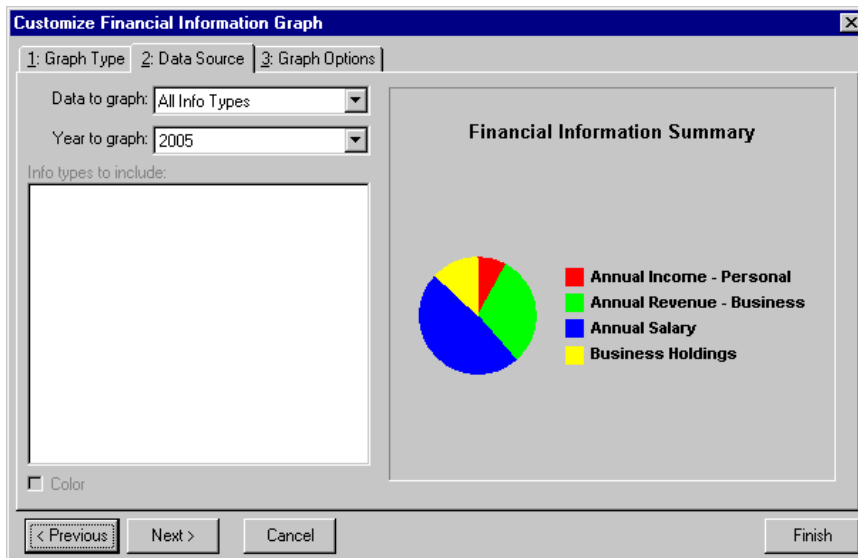
1. From the Prospect tab, select **Financial Information Graph**. A graph summarizing the prospect's financial information appears on the right.



- To design your own graph, click **Customize** on the action bar. The Customize Financial Information Graph screen appears, displaying the Graph Type tab.



- In the **Graph Types** box on the left, select the graph type you want to use to summarize your financial information: Pie, Bar, Line, or Area.
- In the **Graph Type Options** box on the right, you can then select to view your graph in 2-D (two-dimensional) or 3-D (three-dimensional) format.
- Select the Data Source tab.



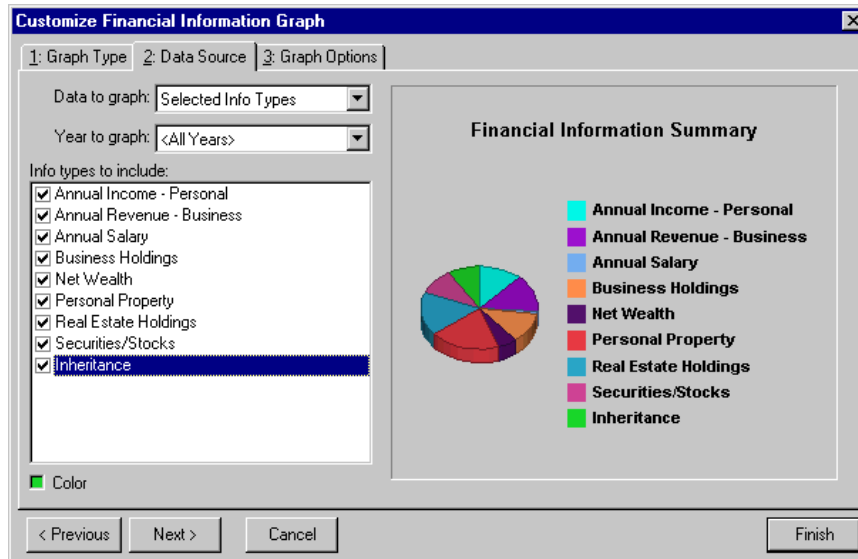
- In the **Data to graph** field, select what you want to graph. You can select one of the following options.

Note: The **Year to graph** option appears for only Pie graphs. It is not an option for Bar, Line, or Area graphs.

- All Info Types - This graphs all information types included in the prospect record (real estate, personal property, annual income). If you select this option and you are running a pie graph, the second field reads **Year to graph**. You must select the year you want to graph. You can also select <All Years>.

Note: The availability of these options depends on the graph type you select.

- Selected Info Types - This graphs only the info types you check in the **Info types to include** box. For example, if you want to include only Annual Salary information, mark the checkbox next to Annual Salary. You can also mark all the checkboxes to include all financial information types.

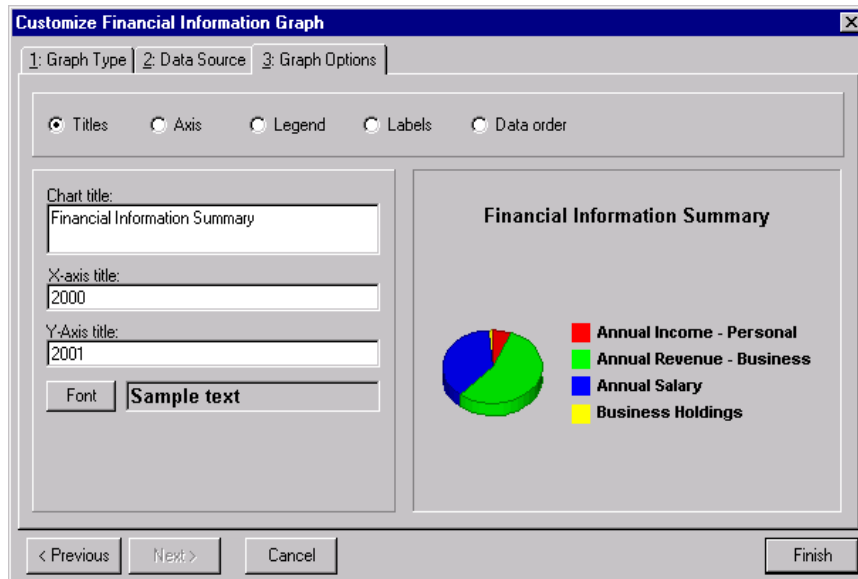


If you select this option and you are running a pie graph, the second field reads **Year to graph**. You must then select the year you want to graph.

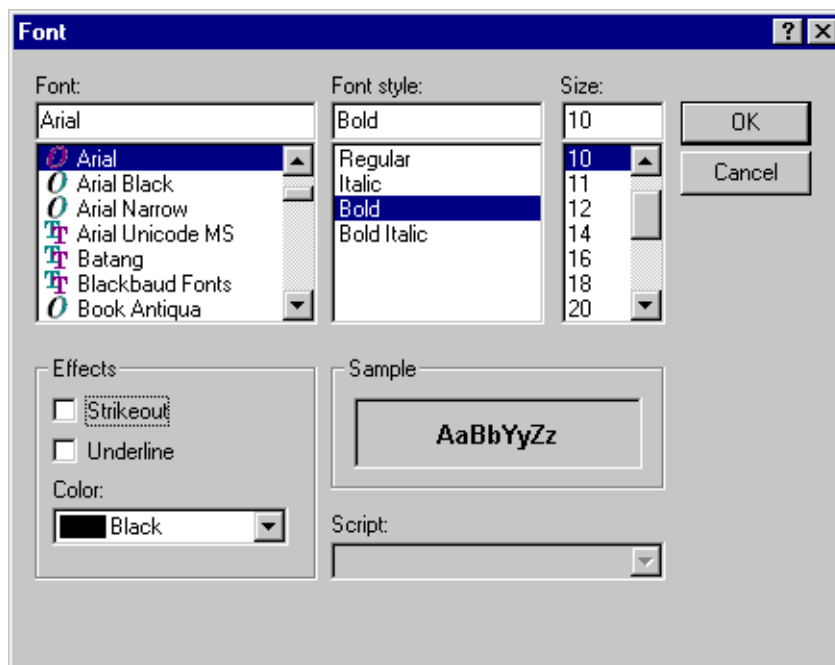
- All Calendar Years - This graphs financial information based on all calendar years included in the prospect record. If you select this option the second field reads **Info type to graph**. You must then select the information types you want to include (real estate, personal property, annual income).
 - Selected Calendar Years - This graphs financial information based on only the calendar years you check in the **Calendar years to include** box. If you select this option the second field reads **Info type to graph**. You must then select the information types you want to include (real estate, personal property, annual income).
 - All Fiscal Years - This graphs financial information based on all fiscal years included in the prospect record. If you select this option the second field reads **Info type to graph**. You must then select the information types you want to include (real estate, personal property, annual income).
 - Selected Fiscal Years - This graphs financial information based on only the fiscal years you check in the **Fiscal years to include** box. If you select this option the second field reads **Info type to graph**. You must then select the information types you want to include (real estate, personal property, annual income).
7. Double click on the **Color** option to access the Color screen. Here you can select the color you want to use in your graph to represent the checked information type or year.

Note: Limited screen space may not allow the program to display all of the graph options you select. However, all selected options will appear when you print your graph.

8. Select the Graph Options tab.



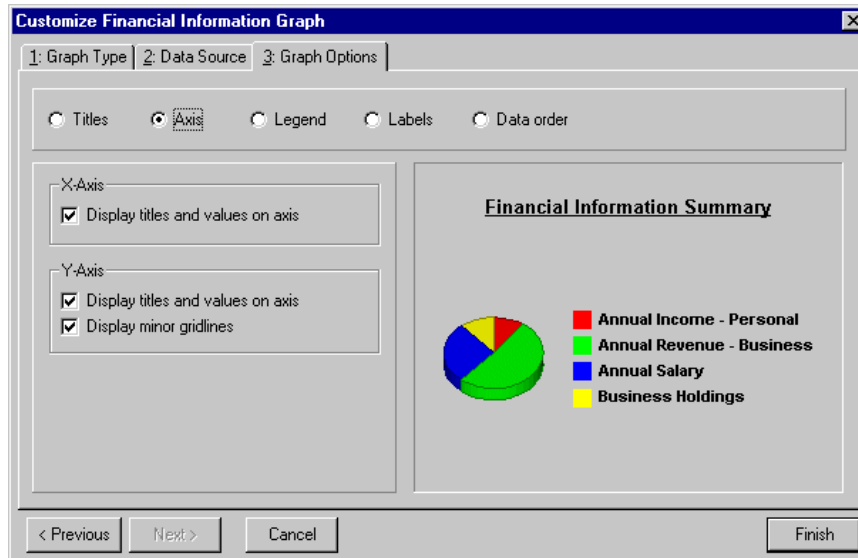
9. In the **Chart title** field, enter a title you want to appear at the top of your graph.
10. The x-axis of your graph is the bottom axis. In the **X-axis title** field you can enter a title to identify this axis in your graph. For example, if appeal information is displayed on the x-axis, you may want to title it "Appeals", so readers of your graph know what they are looking at.
11. The y-axis of your report is the left side axis. In the **Y-axis title** field you can enter a title to identify this axis in your graph. For example, if year information is displayed on the y-axis, you may want to title it "Years", so readers of your graph know what they are looking at.
12. You can also select the **Font** you want to use in your graph. Click the **Font** button. The Font screen appears.



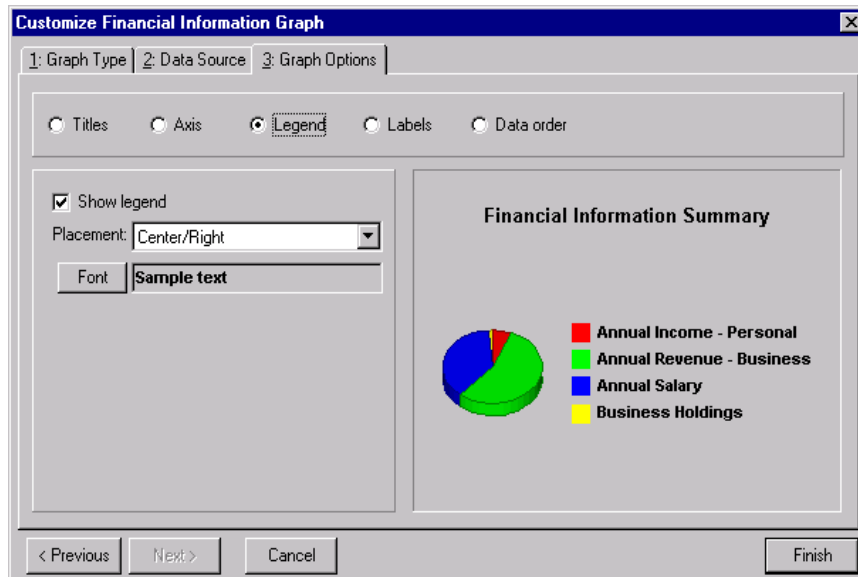
Note: A Pie Graph has no axes. Therefore, **Axis** option entries do not appear on pie graphs.

Select a **Font**, **Font style**, and font **Size** to use in your graph. In the **Effects** frame, you can mark the **Strikeout** checkbox to include a line through your titles or mark the **Underline** checkbox to underline your titles. In the **Color** field, select the font color you want to use in your graph. Click **OK** to return to the Graph tab.

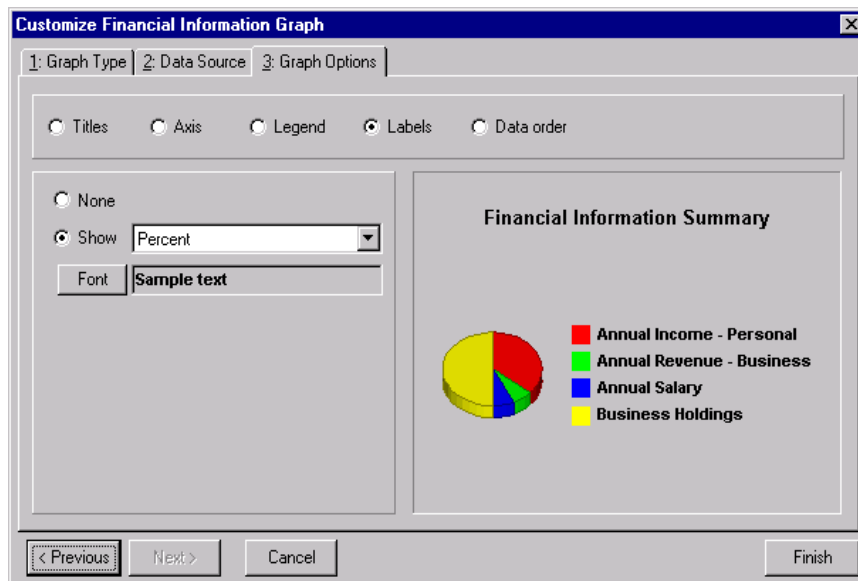
13. Select **Axis**.



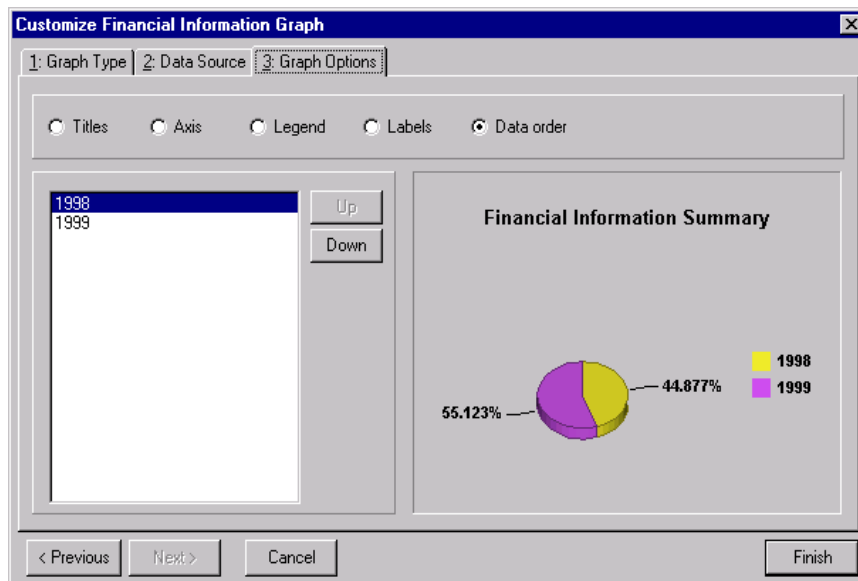
14. You can opt to show titles and data values along the axes of the graph by selecting the **Display titles and values on axis** option in the **X-Axis** and/or **Y-Axis** frame. On the Y-Axis, you can also choose to **Display minor gridlines**. The gridlines then appear at predetermined points along the axis of the graph.
15. Select **Legend**.



16. Select **Show legend** to include a legend explaining the symbols and/or colors used on your graph. You can then select the **Placement** and **Font** of the legend. The right side of the screen displays how the graph will look based on your selections so far.

17. Select **Labels**.

18. Here you can select the labels, if any, you want to appear on your graph. If you opt to **Show** labels, click the drop-down arrow to access the list of available options. You can also select the **Font** used for the label.

19. Select **Data Order**.

20. All the data source information you selected to include in your graph appears in the box. Click the **Up** and **Down** buttons to arrange it in the correct order.

21. Click **Finish** to exit the screen and save your entries.

Proposal

In this category, you can create or open proposals. A proposal is a formal plan, detailing how your organization intends to win funds from a prospective donor, how much financial support you expect, and where the money will be used. For example, you may have read an article about one of your constituents and learned he recently made a large profit on the sale of his company. You can record this information in the various categories on the Prospect tab, and use the **Proposal** category to determine how and how much you intend to solicit from this constituent.

New Proposal for Sean A. Davenport

File Edit View Proposal Help

Save and Close Print Help

General Action Media Attributes Notes

Name: Major Donor Status:

Purpose: Annual Fund Reason:

Campaign: Annual Campaign Type of gift:

Fund: 2005 Annual Fund Instrument:

☒ Solicitor(s) Allison Andrews Rating:

Deadline: 5/5/2005 Date rated:

Amounts

Amount asked: \$100,000.00 Date asked: 5/5/2004

Amount expected: \$100,000.00 Date expected: 5/5/2005

Amount funded: Date funded:

Link to Gift...

☐ Proposal is inactive

Original amount asked: Original date asked:

Press F7 for calculator

Note: The Prospect tab is offered on the Constituent or Organization record only if your organization owns *Prospect Research Management*.

Proposals information is arranged based on five tabs: General, Action, Media, Attributes, and Notes. On the General tab, you enter basic information about the proposal, such as name, where the money is to go, amounts, dates, and progress information.

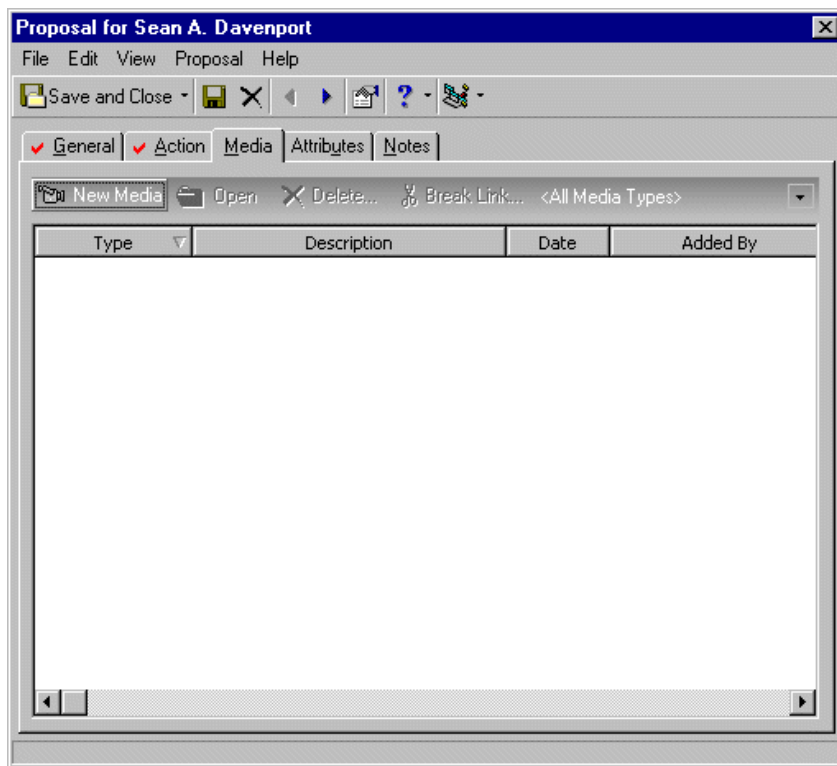
On the Action tab, you tack the actions taken or planned to help your organization win the donation.

| Date | Category | Type | Solicitor(s) | Status | Completed? |
|-----------|------------|-----------|--------------|------------|------------|
| 12/9/2004 | E-mail | Letter | | Continuous | No |
| 8/1/2004 | Phone Call | Thank You | | Continuous | No |

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

An action is a specific step you take towards securing a donation from a constituent. It may include meetings, mailings, telephone calls, and e-mail messages. Actions allow you to build a history of the contacts and communications involved in creating a successful relationship with a constituent. For information about completing the Action tab, see “Adding actions to the Action tab of a proposal record” on page 39.

On the Media tab, you tack constituent information you find in the various media outlets, such as magazine articles, photos, and newsletters.



For more information about completing the Media tab, see “Adding information to the Media tab in Proposals” on page 47.

Note: For more information on entering a new proposal, see “Entering a New Proposal” on page 34 in this book.

On the Attributes tab, you enter attribute information about your proposal, such as eating habits or hobbies.

Proposal for Sean A. Davenport

File Edit View Proposal Help

Save and Close

General Action Media Attributes Notes

Attribute category: <All Categories>

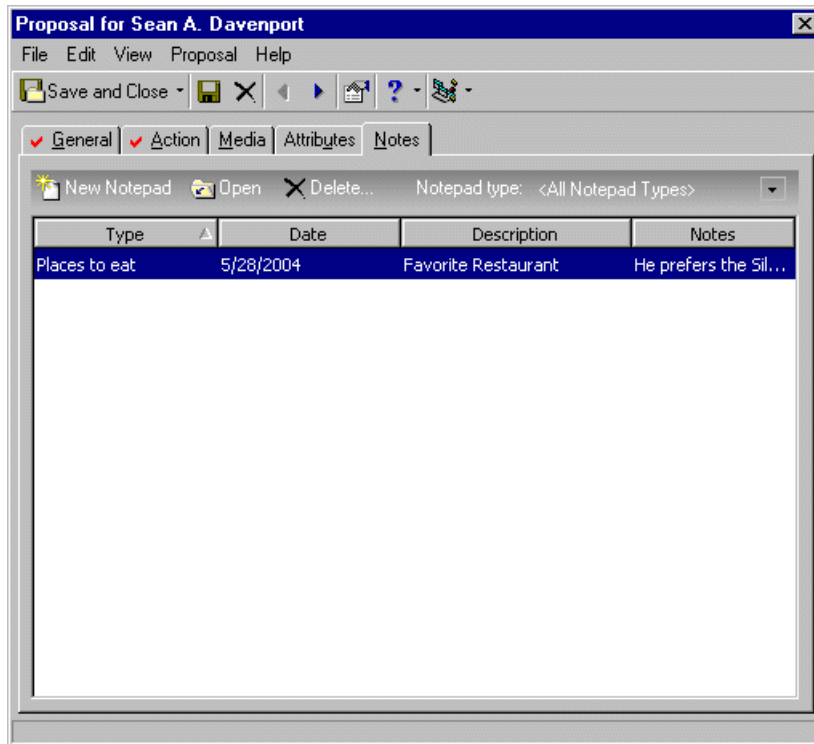
| Category | Description | Short Desc. | Date | Comments |
|---------------------|-------------|-------------|-----------|---------------|
| Dietary preferen... | Low Sodium | | 5/28/2004 | Heart trouble |
| Dietary preferen... | Vegetarian | | 5/28/2004 | |

Note: For more information about creating attributes, see the Configuration chapter in the *Configuration & Security Guide*.

Attributes help you store qualities, characteristics, and preferences associated with a constituent. They serve as a way for you to identify a constituent's special interests, dietary preferences, or mailing requests. Attributes may include hobbies, interests, activities, committees, and important dates. One of the most useful aspects about attributes is their flexibility. Because you create attributes in *Configuration*, you can customize them to meet your organization's specific needs.

For more information about the Attributes tab, see "Adding Attribute information to the Attributes tab in Proposals" on page 50.

On the Notes tab, you can enter any additional information about your prospect.



Notes make it easy to maintain helpful pieces of information you heard, read, or need to remember about a constituent. The **Notes** box accepts free-form text and holds an unlimited amount of information.

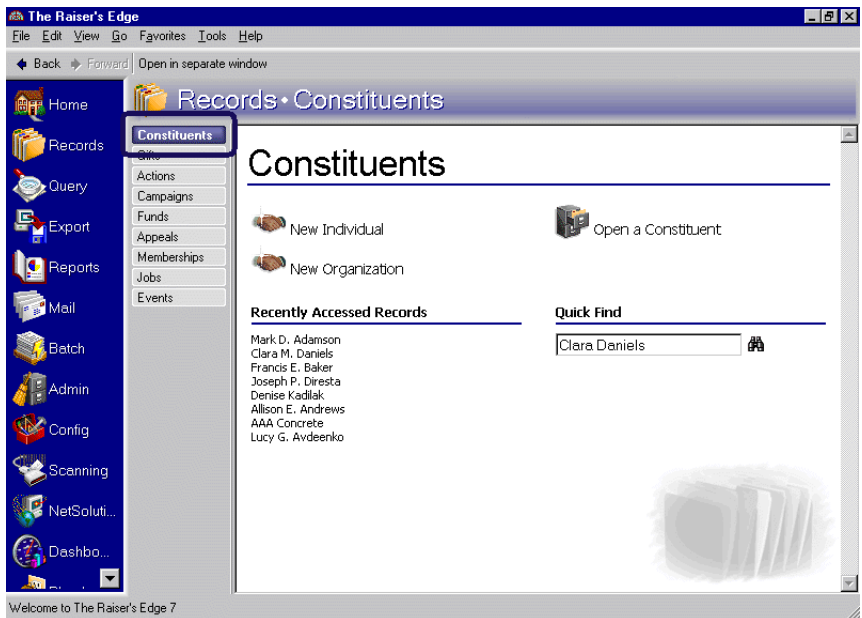
For information about completing the Notes tab, see “Adding notes to the Notes tab in Proposals” on page 52.

Opening a Proposal Record

Once you create and save a proposal record, you can access it to enter changes or view the information.

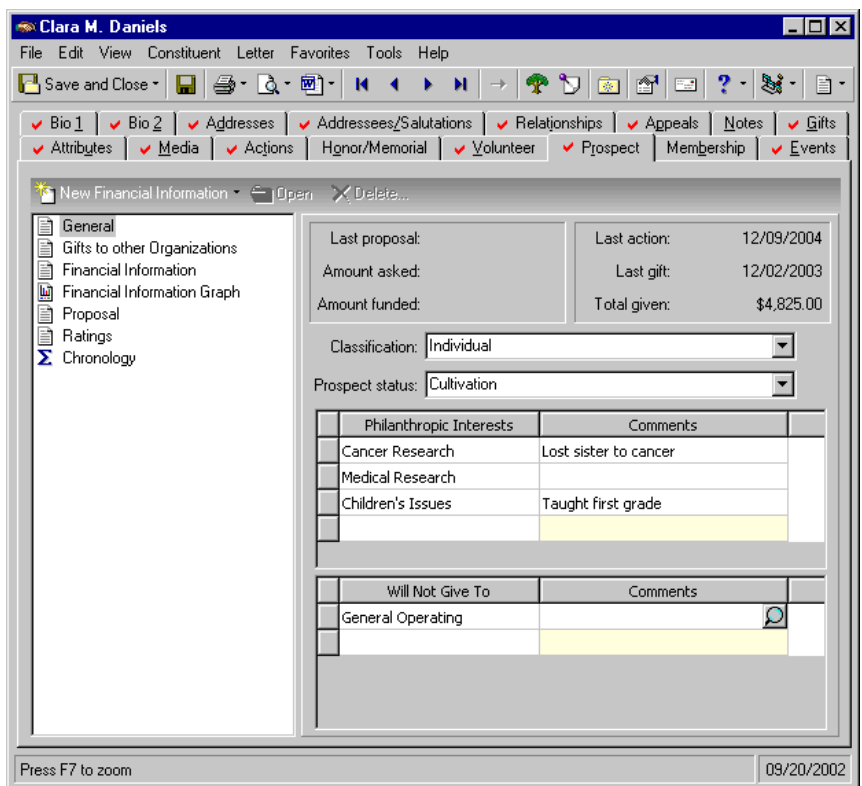
► Opening an existing proposal record

1. From the Raiser's Edge bar, select Records. The Constituents page appears.

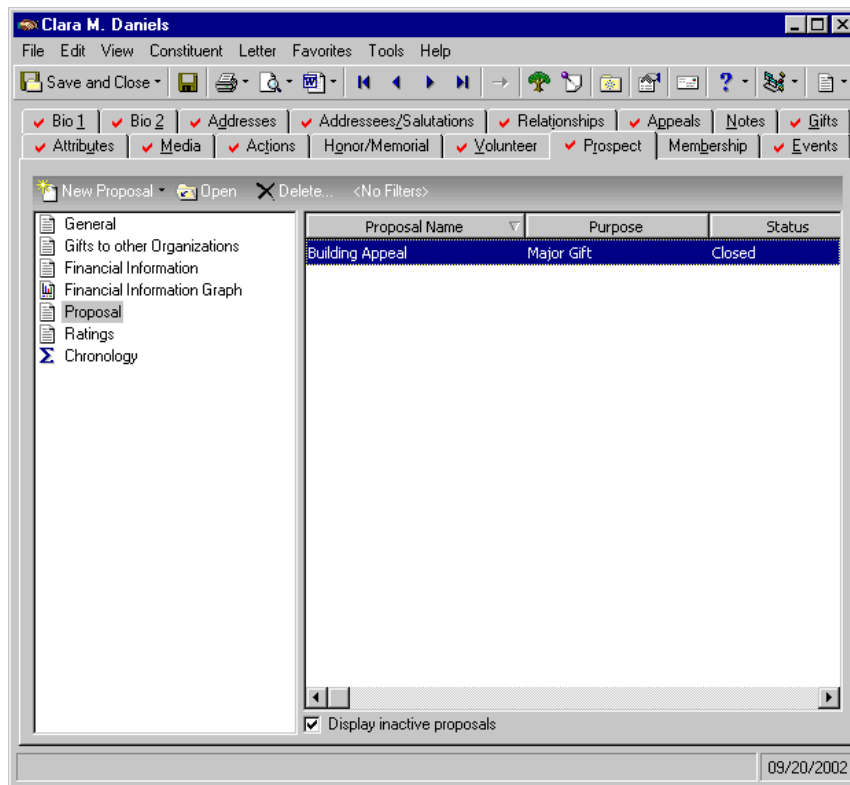


Note: For more information about opening a constituent record, see “Accessing the Prospect tab of a constituent record” on page 7

2. Open the constituent record in which you want to work, and select the Prospect tab.

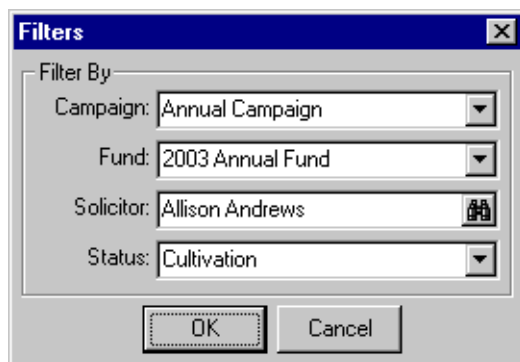


3. From the list on the left, select **Proposal**.



All existing proposals appear on the right side of the screen, displaying the following information. You may have to use the scroll bar at the bottom of the screen to view all columns.

- **Proposal Name**
 - **Purpose**
 - **Status**
 - **Amount Asked**
 - **Date Asked**
 - **Campaign**
4. If you have a long list of proposal records, you can narrow the list based on campaign, fund, solicitor, or status. Click **Filter** on the action bar. The Filters screen appears.



5. You can complete one or all of the fields available on this screen to filter the records listed. For example, you may want to see all proposals associated with your Annual Campaign. Select Annual Campaign in the **Campaign** field, and click **OK**. Only proposals associated with the Annual Campaign appear on the right side of the screen.
6. You can also narrow the list of proposal records by unmarking the **Display inactive proposals** checkbox. If you unmark this checkbox, only proposal records that do not have the **Proposal is inactive** checkbox marked on the General tab of the proposal record display.

Note: For information about completing the Proposal record tabs, see “Entering a New Proposal” on page 34.

7. To open a proposal record, select it, and click **Open** on the action bar. The proposal record appears, displaying the General tab.

Note: To delete a record, select it and click **Delete** on the action bar.

8. After you make any necessary changes to the proposal record, click **Save and Close** from the toolbar to save your changes and return to the Prospect tab.

Entering a New Proposal

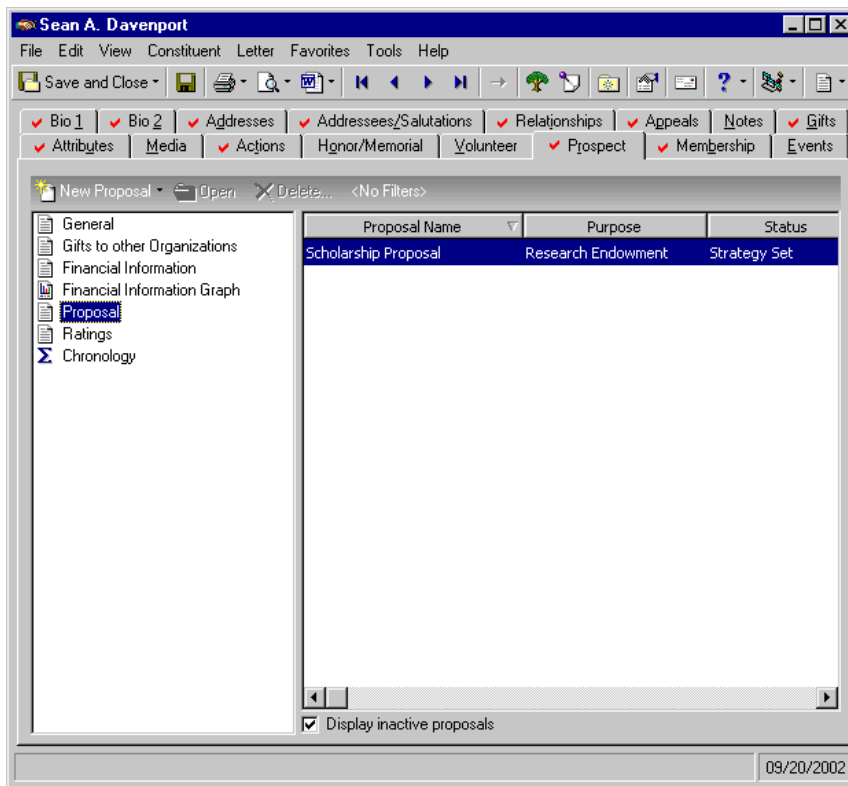
Proposals help you keep track of major fund-raising projects. You can attach a formal proposal to a constituent record, detailing how you intend to solicit the individual, how large a donation you expect and in what time period, and who is responsible for the proposal. Proposals consist of four tabs: General, Action, Media, and Attributes/Notes. This section includes detailed procedures, showing you how to complete all four tabs. The data entered for the procedures is based on the following scenario.

► **Completing the General tab on the proposal record**

Scenario: A non-profit organization dedicated to fighting childhood diseases has researched a number of its constituents, trying to get some idea about their giving potential. From tax records, the organization learns Sean Davenport received a substantial salary bonus last year. In addition, it learned he gave to a number of children-oriented charities over the past several years. The non-profit organization decides Mr. Davenport is a very good prospect for donating \$25,000 to its annual campaign for children's cancer research.

Note: For more information about opening a constituent record, see "Accessing the Prospect tab of a constituent record" on page 7

1. From Sean Davenport's constituent record, select the Prospect tab.



2. From the list on the left, select **Proposal**.

Note: In all fields on the General tab, you can add new entries on the fly. Simply place your cursor in the field and type the new entry.

- On the action bar, click **New Proposal**. The Proposal for Mr. Sean Davenport screen appears displaying the General tab.

- In the **Name** field enter a name for this proposal. The name appears in the **Proposal Name** column on the Prospect tab.

For this scenario, enter “Major Donor/Research Proposal”. When you enter a name, you want to make sure it is easy to identify from the Prospect tab.

Note: For information about entering Campaigns, Funds, and Appeals, see the *Campaigns, Funds, & Appeals Data Entry Guide*.

- In the **Purpose** field select a purpose for any money raised through this proposal. Because of what is known about Sean’s giving history, for this scenario, select “Children’s Research Endowment”.
- In the **Campaign** field, select the campaign to be credited with any donation resulting from this proposal. You can click the binoculars to access the Open screen and search your database for the campaign. If when you created the campaign in *Records*, you assigned it a default fund and/or appeal, the defaults are automatically included in the proposal when you select the campaign. For this scenario, select “Annual Campaign”.
- In the **Fund** field, select the fund to be credited with any donation resulting from this proposal. You can click the binoculars to access the Open screen and search your database for the fund. If when you created the fund entry in *Records*, you assigned it a default campaign, appeal, and/or solicitor, the defaults are automatically included in the proposal when you select the fund. For this scenario, select “2005 Annual Fund”.

Note: You can enter more than one solicitor by entering a semi-colon between IDs. You must then specify how much of the gift to credit to each solicitor. The program defaults to crediting each the full amount.

8. In the **Solicitor(s)** field, you can assign a solicitor to the proposal. If in *Records*, you determined a format to use when entering solicitor names, the program tries to format any text you enter in this field into a valid solicitor ID.

If you want to search the database for the solicitor entry, click the **Solicitor** button. The Solicitors Credited for this Proposal screen appears.

| Solicitor | Percent |
|-----------------|---------|
| Harris Sadler | 0.000 |
| Allison Andrews | 0.000 |

In the **Solicitor** column, click the binoculars at the end of the field to access the Search screen, from which you can search for the solicitor you want to assign to this proposal. You can assign several solicitors to each proposal.

In the **Enter by** field, select how you want the solicitor(s) entered credited for any gift received: **Amount** of gift or **Percent** of gift. The second column heading changes to reflect your selection.

For this scenario, enter "Allison Andrews". Allison is a solicitor in the database.

9. In the **Deadline** field enter the date by which you hope to win a donation. A passed due deadline does not automatically mark the proposal inactive. You must mark **Proposal is inactive** if you want to designate a proposal as inactive.

Note: For information about contacts, see Constituent Records chapter in the *Constituent Data Entry Guide*.

10. If you are working in an organization constituent record, the **Contact** field appears on the proposal screen. You can select the contact name to include in your proposal. Only constituents entered on the Relationships tab of the organization constituent record and marked as **Contact** can be included in the proposal record. If the organization constituent has only one contact, the contact name defaults the **Contact** field.
11. In the **Status** field, enter or select the status of the proposal. You define proposal **Status** options from the **Proposal Status** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Pending, Cultivation, and Closed as **Status** options. These options are then available in the **Status** field of the proposal.

If, while working in the proposal, you want to add a **Status** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Status** option to the **Proposal Status** table. You must click **Yes** to use the option in your proposal.

For this scenario, select "Cultivation".

Note: For information about tables, see the Configuration chapter in the *Configuration & Security Guide*.

12. In the **Reason** field, select or enter the reason you decided to pursue this individual for a donation. You define **Reason** options in the **Proposal Reasons** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter General, Salary Bonus, and Sale of Business as **Reason** options. These options are then available in the **Reason** field of the proposal.

If, while working in the proposal, you want to add a **Reason** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Reason** option to the **Proposal Reason** table. You must click **Yes** to use the option in your proposal.

For this scenario, select “Salary Bonus”.

Note: For information about tables, see the Configuration chapter in the *Configuration & Security Guide*.

13. In the **Type of gift** field, select or enter the type of gift you hope win from this proposal. You define **Type of gift** options in the **Type of Gift** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Pledge, Property, and Cash as **Type of gift** options. These options are then available in the **Type of gift** field of the proposal.

If, while working in the proposal, you want to add a **Type of gift** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Type of gift** option to the **Type of Gift** table. You must click **Yes** to use the option in your proposal.

For this scenario, enter “Cash”.

14. An **Instrument** further defines the type of gift you hope to win from the prospect. For example, if you expect a “Planned gift” **Gift type**, the **Instrument** may be “Life Insurance”. You define **Instrument** options in the **Instrument** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Cash, Bequest, Life Insurance, and Stock as **Instrument** options. These options are then available in the **Type of gift** field of the proposal.

If, while working in the proposal, you want to add an **Instrument** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Instrument** option to the **Instrument** table. You must click **Yes** to use the option in your proposal.

For this scenario, select “Cash”.

Note: Ratings information entered on the proposal screen is not associated with the ratings data stored in the **Ratings** category of the Prospect tab. For more information about the **Ratings** category, see “Tracking Prospect Donor Ratings” on page 54.

15. In the **Rating** field select or enter a rating, suggesting what you believe to be your organization’s chance of success. You define **Rating** options in the **Ratings** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Hesitant, Excellent, Needs Cultivating, and Very Good as **Ratings** options. These options are then available in the **Rating** field of the proposal.

If, while working in the proposal, you want to add a **Rating** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Rating** option to the **Ratings** table. You must click **Yes** to use the option in your proposal.

For this scenario, select “Excellent”.

16. Enter the date you received the prospect’s rating in the **Date rated** field.

17. In the **Amounts** frame, enter the amount information for the prospect.

- In the **Amount asked** field enter the amount you requested or hope to request from the prospect. For this scenario, enter \$25,000.
- In **Date asked** field, enter the date you made your request. If the request has not yet been made, you can leave this field blank.
- In the **Amount expected** field, enter what you realistically expect to win from this prospect. For this scenario, enter \$25,000.
- In the **Date expected** field, enter the date you hope to receive a donation. You can leave this field blank.
- Use the **Amount funded** field for pledges, cash, stock/property, other, gift-in-kind, and recurring gift payments. A proposal is considered funded when a pledge is made. The pledge does not have to be paid.

Note: The **Amount funded** and **Date funded** are automatically updated when you link any gift (except pledge payment) to the proposal. This is true when you link from the gift record to the proposal record and when you link from the proposal record to the gift record. The **Date funded** is set to the oldest linked gift date. If you break the link to the gift record, the **Amount funded** and **Date funded** fields are automatically cleared.

- In the **Date funded** field, enter the date the gift generated by the proposal was made.
- 18. If you want to designate a proposal as inactive, mark the **Proposal is inactive** checkbox.
- 19. If you want to link the proposal to a gift, see “Linking Proposals to Gifts” on page 61.
- 20. After you complete the General tab, select another tab or click **Save and Close** on the toolbar to save your new proposal and return to the Prospect tab.

► Adding actions to the Action tab of a proposal record

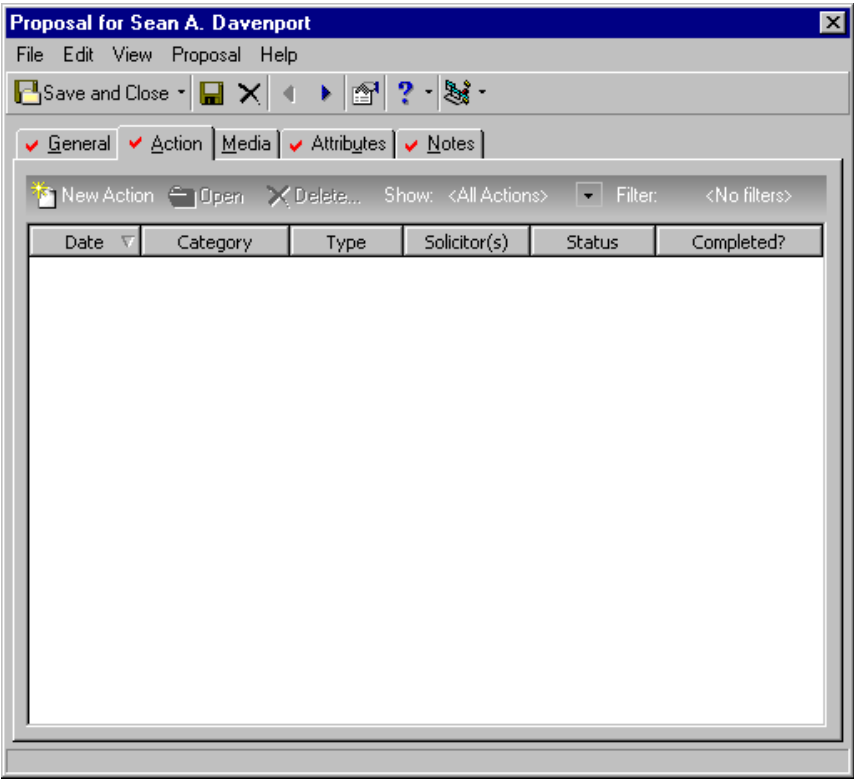
Note: For more information about Action Tracks, see the Action Track section of the Constituent Records chapter in the *Constituent Data Entry Guide*.

On this tab, you can document detailed actions your organization intends to follow in pursuit of a donation. These actions are then linked to the proposal. Using the buttons provided on the action bar, you can create a **New Action**, **Open** or **Delete** any selected action, or filter the type of actions displayed.

Scenario: The organization introduced in the above procedure arranged a dinner with Mr. Davenport to discuss his donating \$25,000 to children’s cancer research. Volunteer Allison Andrews is assigned the responsibility. The supervisor wants to be notified the day before the meeting. You also know Mr. Davenport is a strict vegetarian. You call his secretary the day before to remind him of the dinner date.

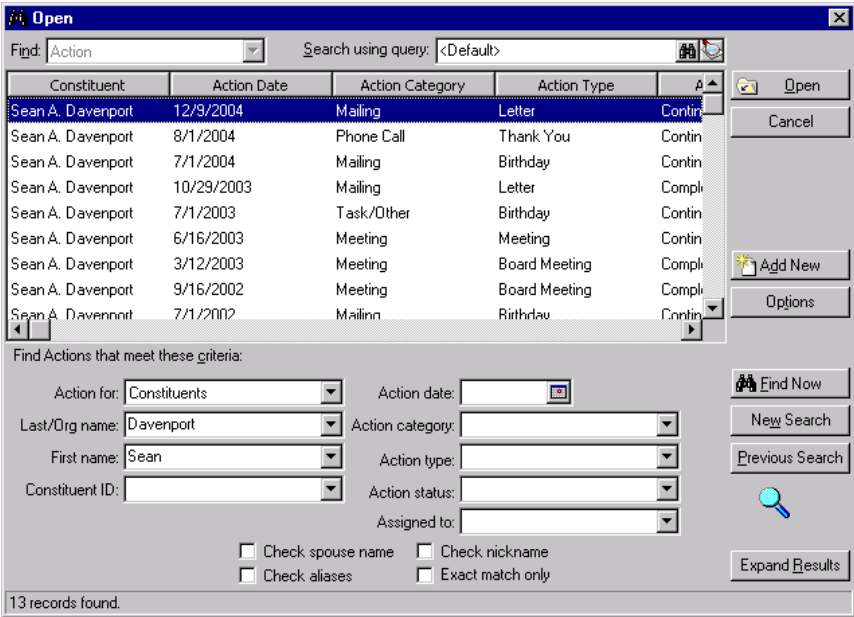
Note: For more information about opening a proposal, see “Opening an existing proposal record” on page 32.

1. From the Proposal screen, select the Action tab.



Note: For more information about the Open screen, see the Program Basics chapter in the *Program Basics Guide*.

2. Select **New Action** on the action bar. The Open screen appears.



Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

- You can search for an existing action or click **Add New** to add a new action to the record.
For this scenario, click **Add New**. The New Action screen appears.

- The individual's name defaults into the **Name** field. His Constituent **ID** number also appears.
- In the **Category** field, select the type of action.
For this scenario, select **Meeting**.

Note: For more information about tables, see the Configuration chapter in the *Configuration & Security Guide*.

- In the **Action type** field, select or enter the specific type of action. You define **Action type** options in the **Actions** category in **Tables** in *Configuration*. For example, you can enter Dinner Meeting, Lunch Meeting, and Phone Call as **Action type** options. These options are then available in the **Action type** field.

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

If, while working in the action record, you want to add an **Action type** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Action type** option to the **Actions** table. You must click **Yes** to use the option in your proposal.

For this scenario, select "Dinner Meeting".

- In the **Action date** field enter the date you intend to execute the action.
For this scenario, the dinner is planned for "5/25/2004".
- In the **Start time** field, enter the time the action will start.
For this scenario, the dinner is planned to start at "7 PM".
- In the **End time** field, enter the time the action will end.
For this scenario, the dinner is planned to end at "9 PM".

10. Click **Solicitor(s)** to access the Solicitor Assigned to this Action screen.



Note: For more information about the Open screen, see the Program Basics chapter in the *Program Basics Guide*.

11. Enter the solicitor's name or click the binoculars to access the Open screen and search for the solicitor in your database.
12. Click **OK** to return to the New Action screen.
13. On the New Action screen, in the **Status** field, enter or select the status of the action. You define action **Status** options in the **Action Status** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Pending, Cultivation, and Closed as **Status** options. These options are then available in the **Status** field.

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

If, while working in the action record, you want to add a **Status** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Status** option to the **Action Status** table. You must click **Yes** to use the option in your proposal.

For this scenario, select "Pending".

14. If the action has been completed, you can check the **Action Completed on** checkbox and enter a date.
15. In the **Location** field, enter the location of the action. You define action **Location** options in the **Action Location** category in **Tables** in *Configuration*.

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

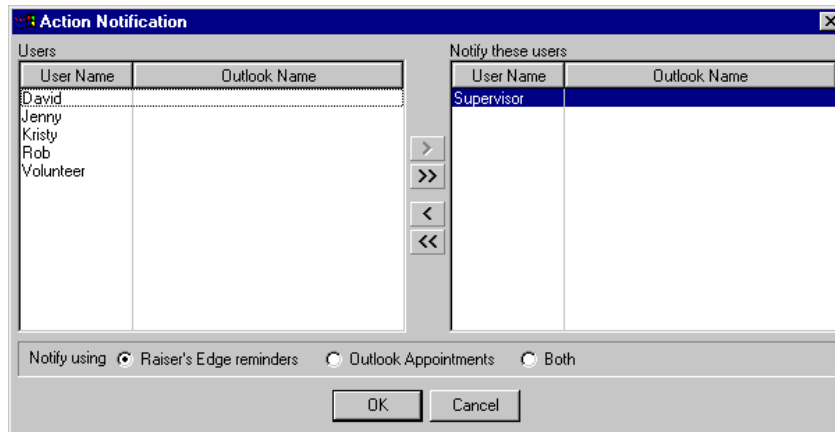
If, while working in the action record, you want to add a **Location** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Action Location** option to the **Action Location** table. You must click **Yes** to use the option in your proposal.

For this scenario, select "Rafferty's".

16. In the **Priority** field, select the importance of this action — **High**, **Normal**, or **Low**.
For this scenario, select "High".
17. Notification reminders on your actions allow *The Raiser's Edge* to remind you days, weeks, or months before an action is scheduled to occur. You can keep track of when to phone a constituent, send out a mailing, or meet a prospect for lunch.
18. To send an e-mail reminder regarding this Action, mark the **Auto-Remind** checkbox. The fields in the **Auto-Remind** frame are enabled.

Note: On the bottom of the Action Notification screen, you can select whether you want to be notified using **Raiser's Edge reminders**, **Outlook Appointments**, or **Both**. You can only select **Outlook Appointments** if you have *Microsoft Outlook* installed.

19. Click **Notify**. The Action Notification screen appears.



20. From the **Users** box, highlight “Supervisor” and click the single right arrow. This moves Supervisor over to the **Notify these users** box. This means the Supervisor is reminded automatically of this action when she logs into *The Raiser’s Edge*.
21. On the bottom of the Action Notification screen, select whether you want to be reminded using **Raiser’s Edge reminders**, **Outlook Appointments**, or **Both**. For this scenario, mark **Raiser’s Edge reminders**.

To use Outlook appointments, you must have *Microsoft Outlook* installed, and your name must be set up as a user. When you mark **Outlook Appointments**, a meeting request is sent to the persons in the **Notify these users** box. The meeting defaults to the **Action date**, the **Start time**, and **End time** you enter on the Action screen. If you enter a **Start time** and no **End time**, the meeting defaults to 30 minutes. If you enter neither a **Start time** nor **End time**, the meeting is set up as an all day event. If you change the meeting date and time in *The Raiser’s Edge*, the meeting updates in *Outlook*. If you change the meeting date and time in *Outlook*, the meeting does not update in *The Raiser’s Edge*.

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

22. Click **OK**. You return to the General tab of the action record.
23. In the **Set reminder for** field, enter “1” in the first box and select “day(s)” in the second box. This information tells *The Raiser’s Edge* you or another user want to be reminded of this action one day before the date in the **Action date** field.
24. In the **Campaign** field, select the campaign to be credited with any donations resulting from this action. You can click the binoculars to access the Open screen and search your database for the campaign. If you assigned the selected campaign a default fund when you created it in *Records*, the default is automatically included when you select the campaign.
- For this scenario, select “Annual Campaign”.
25. In the **Fund** field, select the fund to be credited with any donation resulting from this action. You can click the binoculars to access the Open screen and search your database for the fund. If when you created the fund entry in *Records*, you assigned it a default campaign, the default is automatically included when you select the fund.
- For this scenario, select “2003 Annual Fund”.

Note: For more information about the Open screen, see the Program Basics chapter in the *Program Basics Guide*.

26. The program automatically associates the action to the proposal from which you accessed the Action screen. In this scenarios, “Major Donor/Research Proposal” defaults.
- To change the **Proposal** field, click the binoculars. The Open screen for Proposals appears so you can search your database for the correct proposal. When found and selected, the proposal name appears in the field.

Note: For more information about actions, see the Actions chapter in the *Constituent Data Entry Guide*.

27. Select the Attributes tab. Attributes are the qualities, characteristics, and preferences you associate with an action. They can include activities, special requests, or important dates.

The screenshot shows the 'New Action' window with the 'Attributes' tab selected. The 'Attribute category' dropdown is set to '<All Categories>'. The table below shows the data entered:

| Category | Description | Short Desc. | Date | Comments |
|--------------------|-------------|-------------|-----------|----------------------|
| Left Message? | Yes | | 5/24/2004 | Secretary took call. |
| Dietary Preference | Vegetarian | | | |

28. In the **Category** column, select an attribute category. You define attribute categories in the **Attributes** link in *Configuration*. For example, you can enter Attended, Left Message, and Dietary Preference as action attribute **Category** options.

For this scenario, select "Dietary Preference".

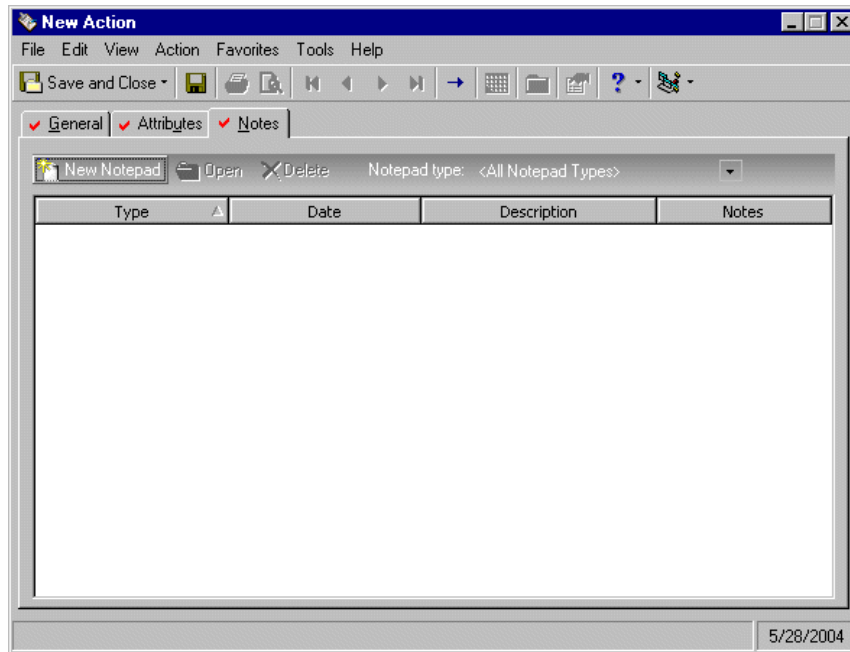
Note: For information about creating attribute table entries, see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

29. Tab over to the **Description** column. Enter or select the specifics regarding the attribute **Category**. You define attribute descriptions in the **Attributes** link in *Configuration*. For example, you can enter Low Fat, Vegetarian, and No Meat as attribute category **Description** options.

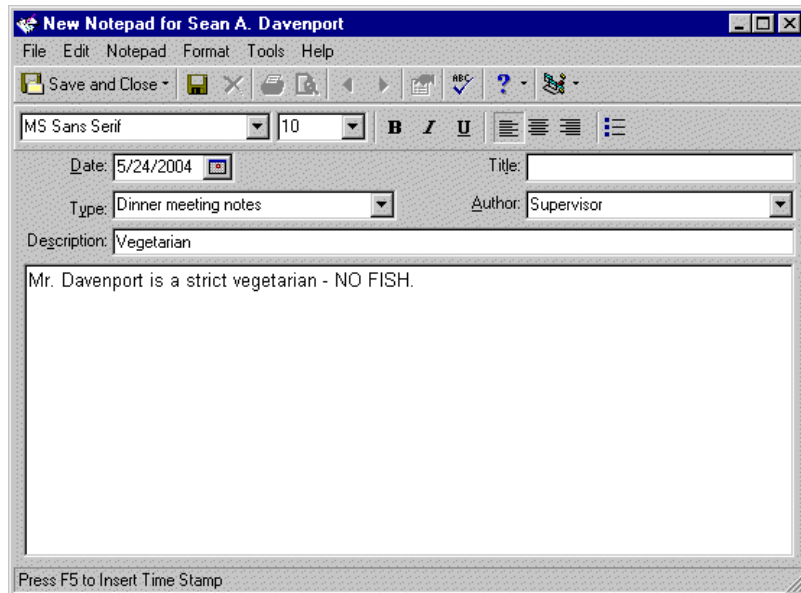
For this scenario, select "Vegetarian".

30. Repeat steps 28 and 29 to enter information on the confirmation call.

31. Select the Notes tab.

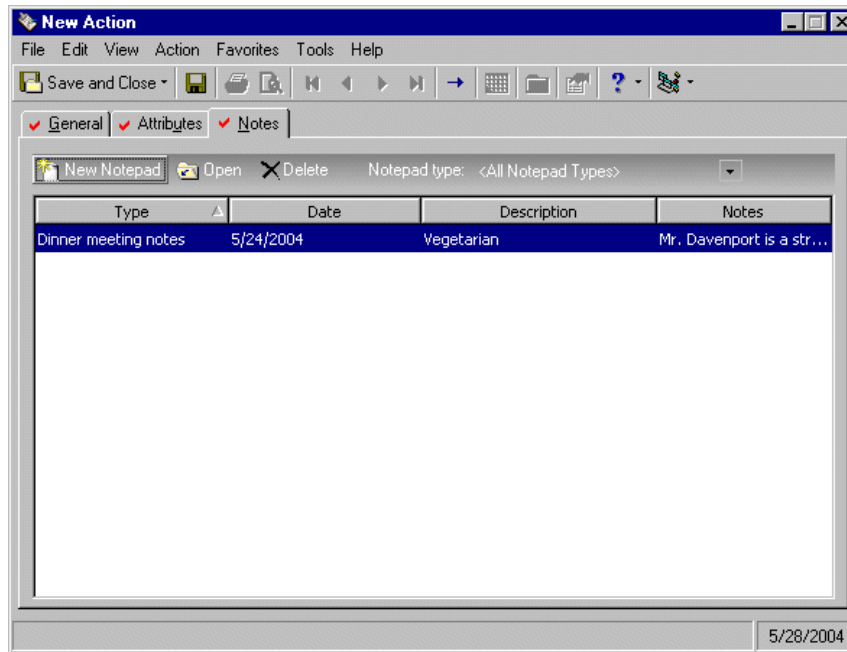


32. To enter a note, click **New Notepad**. The New Notepad screen appears.

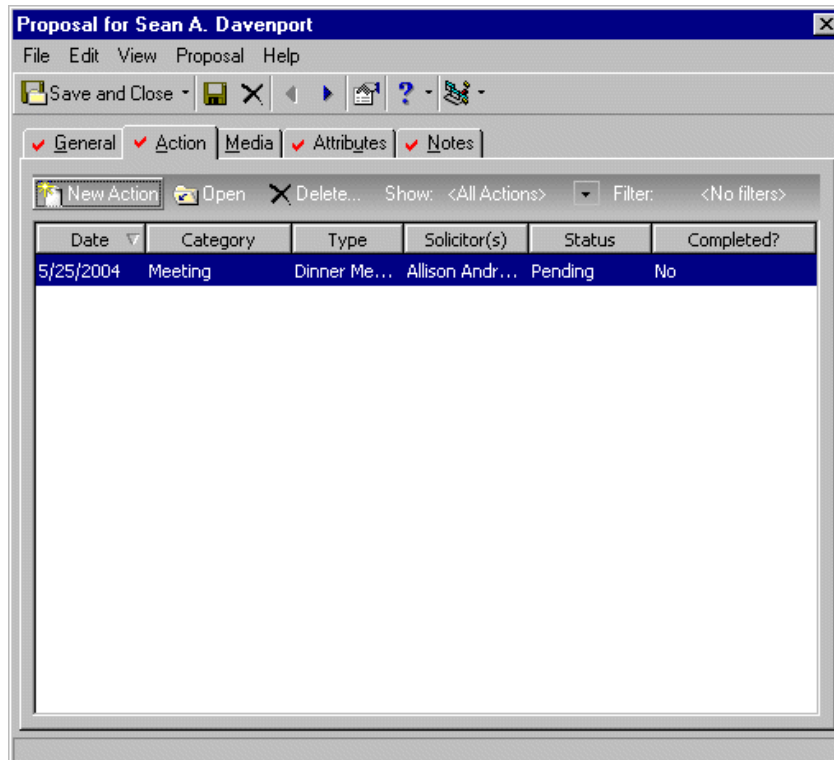


33. The **Date** defaults to the day you created the note.
34. Enter a note **Type**. For this scenario, enter "Dinner meeting notes" because the notes are to help you with your dinner meeting tomorrow with Mr. Davenport.
35. You can also enter a **Title** for the notepad.
36. The **Author** defaults.
37. In the **Description** field, enter "Vegetarian".
38. In the box, enter a reminder that "Mr. Davenport is a strict vegetarian - NO FISH".

39. Click **Save and Close** on the toolbar to save your new note and return to the Action screen.



40. Click **Save and Close** on the toolbar to save your new action and return to the Proposal screen.



41. The new action appears in the grid on the Action tab.
42. Select another tab on the Proposal screen, or click **Save and Close** on the toolbar to save your new action and return to the Prospect tab.

► Adding information to the Media tab in Proposals

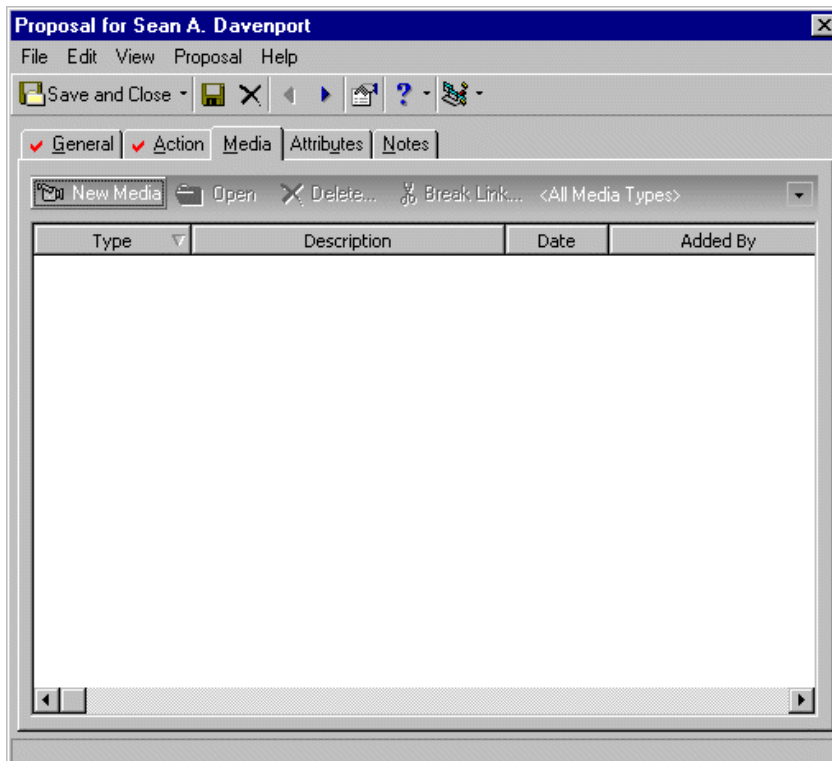
Note: For more information about the Media tab, see the Media Tab section in the Constituent Records chapter in the *Constituent Data Entry Guide*.

The Media tab stores newspaper clippings, letters, pictures, graphs, and other such data using Object Linking and Embedding (OLE). OLE stores or links information created in another *Windows* application into the Media tab of the proposal record. From this tab, you can add a new media objects to your proposal, open and edit one that is already embedded or linked, and delete an existing object you no longer need. This procedure includes step-by-step instructions on adding a media object to a proposal record.

Scenario: Mr. Davenport is the proud father of a little girl and contributes photos of his daughter for inclusion in your major donors calendar. You want to include this information and the most recent photo in his proposal record.

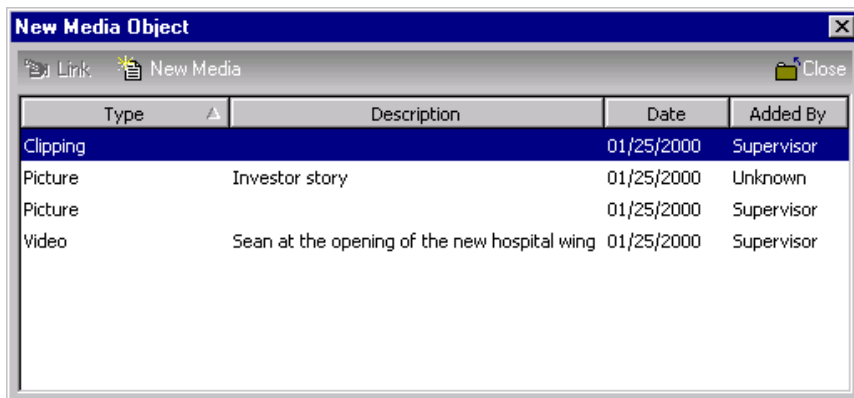
Note: For more information about opening a proposal, see “Opening an existing proposal record” on page 32.

1. From the Proposal screen, select the Media tab.



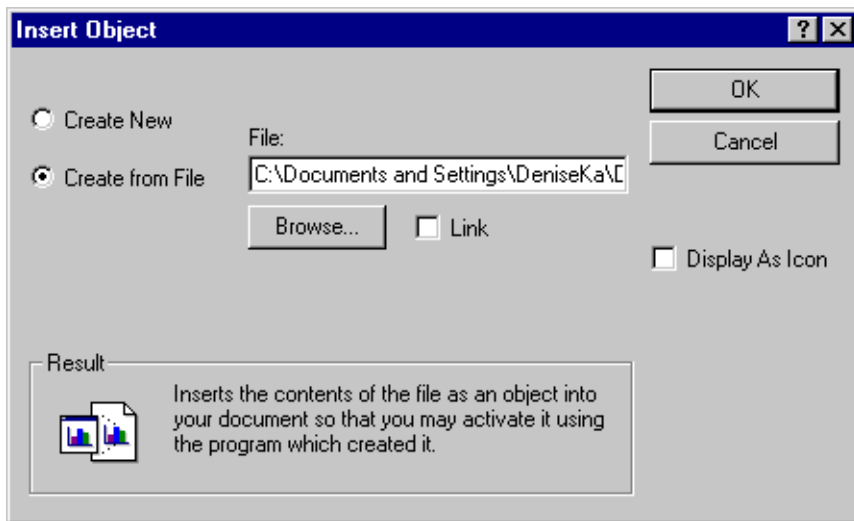
Note: For more information about the Media tab, see the Media Tab section in the Constituent Records chapter in the *Constituent Data Entry Guide*.

- To add an object, click **New Media** on the action bar. The New Media Object screen appears.



Note: For either option, you can select to **Display As Icon**, and the new object appears as an icon on the New Media for screen.

- Any media objects you saved on the Media tab in the constituent record appear. You can select to add one of these existing media objects to the proposal record, or click **New Media** to add a new media object. For this scenario, click **New Media**. The Insert Object screen appears.

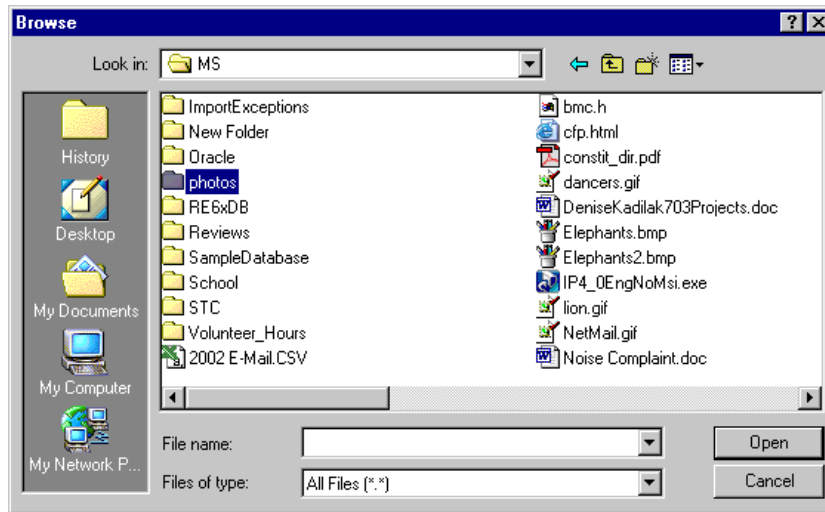


Note: To generate a new media object, select **Create New**. You can use various object types, such as Microsoft Word, Power Point, Paintbrush, and Adobe Acrobat.

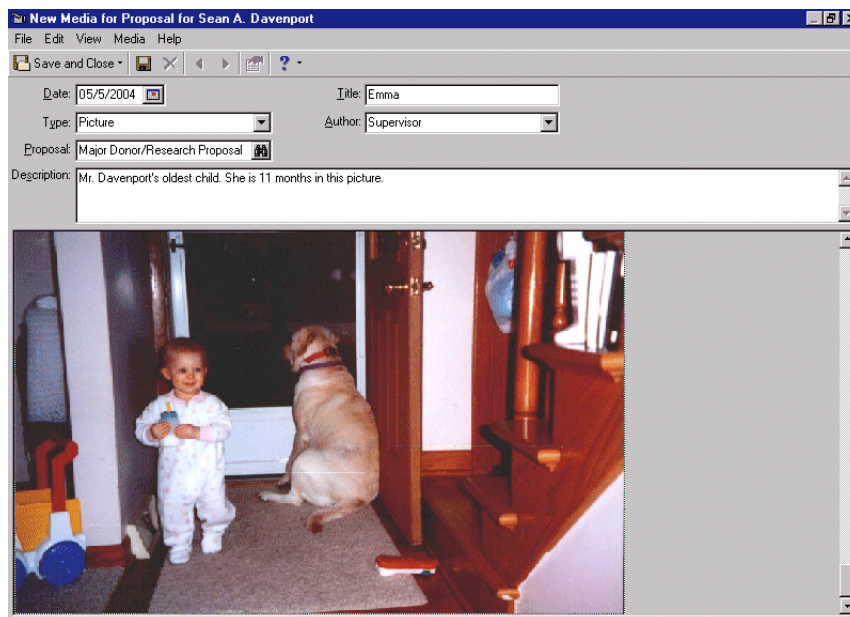
- Because the children's photos are saved on the hard drive, select **Create from File**. You must enter the **File** name and path of the media object you want to add.

Note: For more information about the Media tab, see the Media Tab section in the Constituent Records chapter in the *Constituent Data Entry Guide*.

If you do not know the exact **File** name and path, click **Browse**. The Browse screen appears.



5. Locate the media object and click **Open**. You return to the Insert Object screen.
6. Click **OK**. The New Media screen appears. The picture appears in the bottom half of the screen.



7. In the **Date** field, enter the date you added the new object.
For this scenario, enter "05/5/2004".
8. In the **Type** field, identify the type of object you included in your proposal record. Media type options are defined in the **Media Type** category in **Tables in Configuration**. For example, in *Configuration*, you can enter Clipping, Video, and Picture as your media **Type** options. These options are then available for your Media tab.
For this scenario, select "Picture".

Note: For more information about the Media tab, see the Media Tab section in the Constituent Records chapter in the *Constituent Data Entry Guide*.

9. In the **Proposal** field, identify the proposal record to which you want to add the media object. The name of the proposal from which you accessed the Media tab defaults into the field. To change the default proposal, click the binoculars to access the Open screen for proposals. Locate the proposal record and click **OK**.
10. You can also enter a **Title**, further identifying the media object.
For this scenario, enter the daughter's name "Emma".

Note: For information about creating authors, see the Security chapter in the *Configuration & Security Guide*.

11. In the **Author** field, select the media object's author. You establish **Author** options in **Security**.
For this scenario, select "Supervisor".
12. In the **Description** box, enter additional details about the media object. For example, you can describe the picture.

Note: New entries can also be added on the fly. Simply place your cursor in the field and type the new entry.

For this scenario, enter age information about the child.

13. To close the New Media screen and return to the New Media Object screen, click **Save and Close** on the toolbar.
14. To close the New Media screen and return to the Media tab on the proposal record, click **Close**, in the far right corner.

Note: You establish attributes in *Configuration*. For information on entering the attributes into your system, please see the Configuration chapter in the *Configuration & Security Guide*.

► Adding Attribute information to the Attributes tab in Proposals

The Attributes tab stores the qualities, characteristics, and preferences you associate with a constituent. They serve as a way for you to identify a constituent's special interests, dietary preferences, or mailing requests. Attributes may include hobbies, interests, activities, committees, and important dates. One of the most useful aspects about attributes is their flexibility. You can customize attributes to meet your organization's specific needs.

Scenario: While preparing its proposal on Sean Davenport, the non-profit organization learns he likes to play golf.

Note: For more information about opening a proposal, see "Opening an existing proposal record" on page 32.

1. From the Proposal screen, select the Attributes/Notes tab.

| Category | Description | Short Desc. | Date | Comments |
|----------|-------------|-------------|-----------|-----------------------------------|
| Interest | Golf | | 5/24/2004 | Often signs up for charity events |

Note: To delete an attribute, select the row, and click the **DELETE** key on your keyboard.

2. To enter an attribute in the grid, click in the **Category** column to access a list of choices. Attribute **Category** options for a proposal record are defined in the **Proposal** category in **Attributes** in *Configuration*. For example, in *Configuration*, you can enter Dietary Preference and Interests as proposal attribute category options. These options are then available from the Attributes/Notes tab in the proposal record.
For this scenario, select "Interests".
3. In the **Description** column, enter a description of the interest.
For this scenario, enter "Golf".
4. In the **Date** column, enter the date you are entering this information.
For this scenario, enter "5/24/2004".
5. In the **Comments** column, you can enter any additional information related to the interest.
For this scenario, enter "Often signs up for charity events".
6. Select another tab or click **Save and Close** to save the proposal record and return to the Prospect tab.

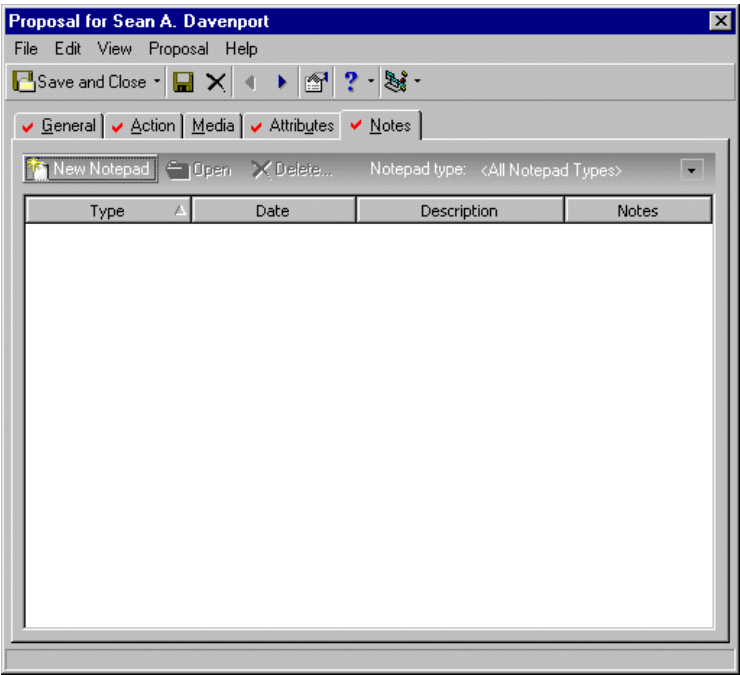
► **Adding notes to the Notes tab in Proposals**

The Notes tab stores any additional information you want to include in the constituent's proposal record.

Scenario: While preparing a proposal on Sean Davenport, the non-profit organization learns he likes to play golf, which they enter on the Attributes tab. They also learned he often arranges his vacations around golf. The nonprofit wants this information included on the record as well, but the comments column of the attribute record is too small.

Note: For more information about opening a proposal, see “Opening an existing proposal record” on page 32.

1. From the Proposal screen, select the Notes tab.



- To enter a note, click **New Notepad**. The New Notepad screen appears.

- The **Date** defaults to the day you created the note.
- Enter a note **Type**. For this scenario, enter “Vacations”.
- You can also enter a **Title** for the notepad.
- The **Author** defaults.
- In the **Description** field, enter “Golfing trips”.
- In the **Notes** box, you can enter any additional information you may need to track your prospect.
For this scenario, enter “Told by an employee at his company that Mr. Davenport arranges his summer vacation based on the golf courses available”.
- Select another tab or click **Save and Close** to save the proposal record and return to the Prospect tab.

Editing the Original Amount/Date Asked on a Proposal Record

If after you create a proposal, you discover the Original amount asked and/or the Original data asked information appearing in the status bar at the bottom of the proposal record needs to be adjusted, you can edit this information from the menu bar in the proposal record.

► Editing the Original Amount/Date Asked

1. From the proposal record, select **Proposal, Edit Original Amount/Date Asked** from the menu bar.

The screenshot shows a software window titled "Proposal for Sean A. Davenport". It has a menu bar with "File", "Edit", "View", "Proposal", and "Help". Below the menu bar is a toolbar with "Save and Close", "Previous Proposal", and "Next Proposal". The "Proposal" menu is open, showing options: "Edit Original Amount/Date Asked...", "Load Defaults from...", and "Link to Gift...". The "General" tab is selected, showing fields for Name, Purpose, Campaign, Fund, Solicitor(s), Deadline, Status, Reason, Type of gift, Instrument, Rating, Date rated, Amounts (asked, expected, funded), and Date asked, Date expected, Date funded. The "Amounts" section shows "Amount asked: \$100,000.00" and "Date asked: 5/5/2003". At the bottom, there is a status bar showing "Original amount asked: \$100,000.00" and "Original date asked: 5/5/2003".

The Edit Original Amount/Date Asked screen appears.

The screenshot shows a dialog box titled "Edit Original Amount/Date Asked". It contains the text "Enter the new information you would like to appear in the status bar." Below this are two input fields: "Original amount asked:" with the value "\$10,000.00" and "Original date asked:" with the value "1/5/99". At the bottom are "OK" and "Cancel" buttons.

2. Enter the new amount in the **Original amount asked** field.
3. Enter the new date in the **Original date asked** field.
4. Click **OK** to save the changes.

Tracking Prospect Donor Ratings

Ratings are statistics on your constituents' giving potential compiled by your organization or an outside prospect research agency. These ratings can be based on articles published on your constituents, Income Tax returns, data received from the SEC, etc.

Note: For information about Target Analytics services, see the *Target Analytics Guide*.

You can enter ratings information manually or electronically transfer ratings data provided by an outside agency using the program's **Import** and *Export* functions. If you subscribe to Target Analytics services, you can use the **Target Analytics** link in *Administration* to download research information.

The manual process is explained in this section.

If your data has been scored by *Target Analytics* for the Giving Score, you can view an individual's Giving Score rating from the Ratings category of the Prospects tab as well.

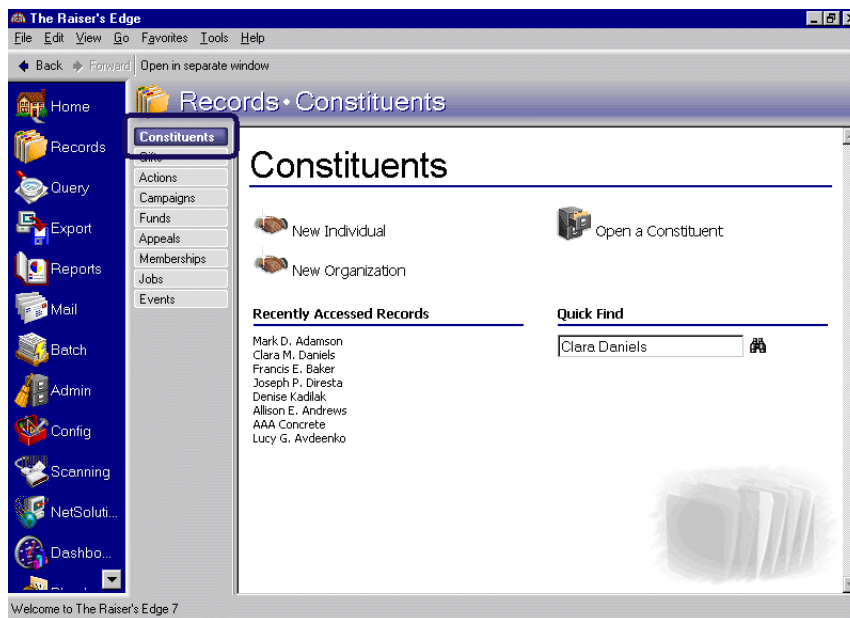
Note: For information about electronically transferring data to and from a non-Blackbaud outside research agency, you must contact the agency.

Opening an Existing Rating from the Prospect Tab

If ratings information already exists on the Prospect tab, you can open the Ratings screen to view and change the information at any time.

► Opening an existing rating from the Prospect tab

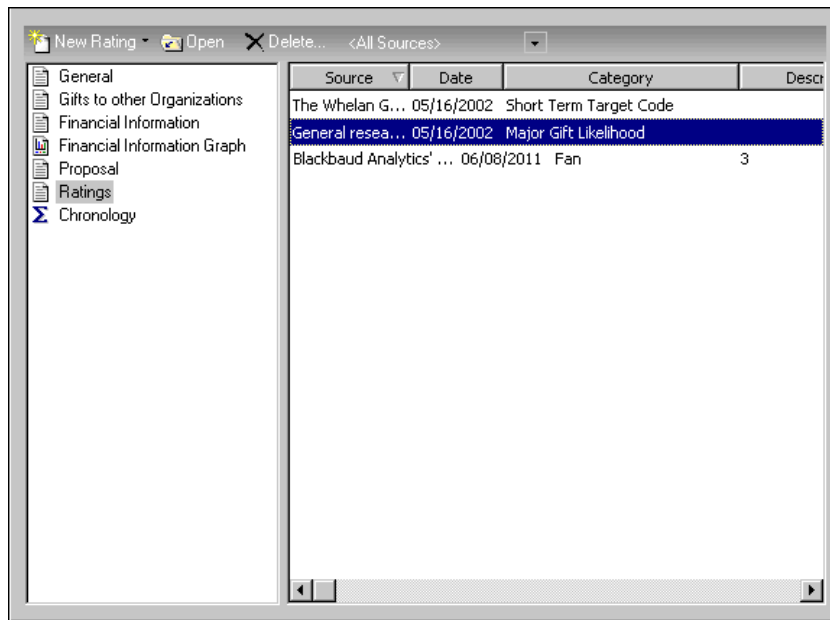
1. From the Raiser's Edge bar, select Records. The Constituents page appears.



Note: For more information about opening a constituent record, see “Accessing the Prospect tab of a constituent record” on page 7

2. Open the constituent record in which you want to work, and select the Prospect tab.

3. From the list on the left, select **Ratings**.



Note: To delete a record, select it and click **Delete** on the action bar.

Any existing ratings appear on the right side of the screen, displaying the following information. You may have to use the scroll bar at the bottom of the screen to view all columns.

- **Source**
 - **Date**
 - **Category**
 - **Description**
 - **Notes**
4. You can limit the ratings displayed by clicking **All Sources** on the action bar and selecting a specific ratings source. For example, if you want to view only ratings from Target Analytics services, select Target Analytics' Customization. Only ratings information provided by Target Analytics services appears in the list on the right side of the screen.

Note: For information about completing the Rating screen, see “Entering Prospect Ratings Information” on page 57.

5. To open a rating, select it, and click **Open** on the action bar. The Rating screen appears.

6. After you make any necessary changes to the rating information, click **Save and Close** from the toolbar to save your changes and return to the Prospect tab.

Entering Prospect Ratings Information

Note: For information about working with Target Analytics services, see the *Target Analytics Guide*.

You can enter prospect ratings information one of three ways: manually, using the **Ratings** option on the Prospect tab; automatically import the data from Target Analytics services, using the Target Analytics utility included in Data Services; or if importing data from a non-Blackbaud research agency, use the **Export** and **Import** functionalities offered in *The Raiser's Edge* to move data into the **Ratings** category.

Note: To import data from a non-Blackbaud research agency, you must contact the research agency to learn how they want the export and import files formatted. For information about working in **Import**, see the *Import Guide*. For information about working in **Export**, see the *Query & Export Guide*.

The manual process is explained in this section.

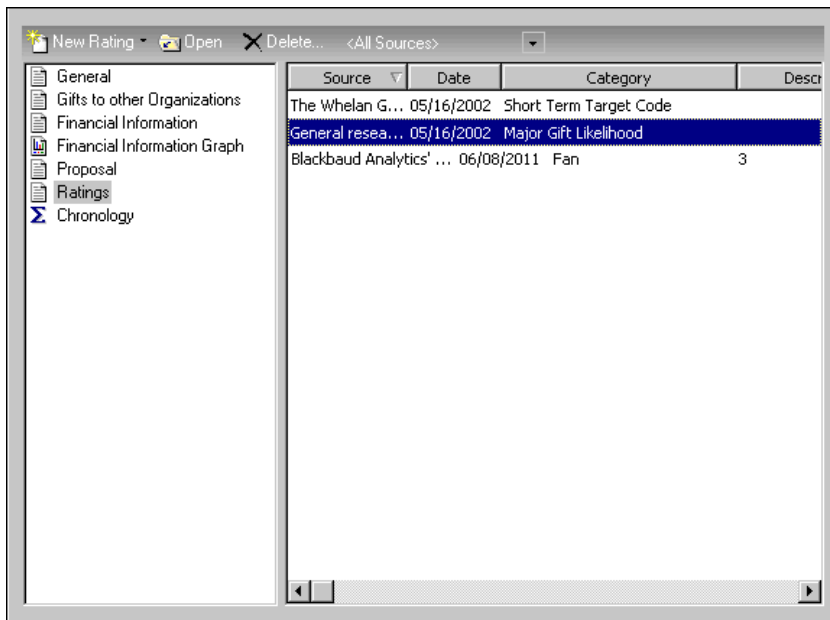
► Manually entering prospect ratings

Scenario: Your organization has researched its constituents and rated them based on data received from their 2003 income tax returns and investment periodicals. From his quarterly income tax records, you learn Sean Davenport earned \$300,000 in 2003. You also discover, while reading the Oct. 4, 2004, issue of Forbes magazine, that Mr. Davenport is a prolific investor with a \$1.5 million stock portfolio. Your organization rates him an excellent prospect. You would like to record this information on the constituent record prospect tab.

Scenario:

1. From Sean Davenport's constituent record, select the Prospect tab.

2. Select **Ratings** in the treeview on the left. All ratings data entered on the constituent record appears on the right side of the screen.



Note: For information on creating table entries, please see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

3. To enter a new rating, click **New Rating** on the action bar. The New Rating for Mr. Sean Alan Davenport screen appears.

The screenshot shows a form titled "New Rating for Sean A. Davenport" with a menu bar (File, Edit, View, Rating, Help) and a toolbar (Save and Close, Save, Cancel, Previous, Next, Help, Print). The form contains the following fields:

- Source:** General research
- Date:** 05/16/2004
- Category:** Excellent Prospect
- Description:** \$300,000
- Notes:** Salary and bonus in 2003.

At the bottom of the form, it says "Press F7 to zoom".

4. In the **Source** field, select the source of the information. You define source options in the **Sources** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Target Analytics services, Econometrics, and General research. These options are then available in the **Source** field of the Rating screen.

Note: For information on creating table entries, please see the Tables section in the Configuration chapter in the *Configuration & Security Guide*.

If, while working on the Rating screen, you want to add a **Source** option, you can enter it in the field. When you move to the next field, the program gives you the option of adding the new **Source** option to the **Sources** table. You must click **Yes** to use the option.

For this scenario, because the research was done in-house, select “General research”.

Note: New entries can also be added on the fly. Simply place your cursor in the field and type the new entry.

5. In the **Date** field, enter the date you are entering the ratings information
For this scenario, enter “05/16/2004”.
6. In the **Category** field, select a category rating your prospect. You define rating category options in the **Ratings** category in **Tables** in *Configuration*. For example, in *Configuration*, you can enter Excellent Prospect, Good Prospect, and Hesitant. These options are then available in the **Category** field of the Rating screen.
For this scenario, select “Excellent Prospect”.
7. In the **Description** field, enter a monetary description of your prospect. For example, in this scenario, Mr. Davenport’s salary and bonus equals \$300,000, so enter “\$300,000” in the **Description** field.
8. In the **Notes** box you can include any additional information.
9. For this scenario, enter “Salary and bonus in 2003”.
10. To enter the stock information, from the **Ratings** option on the Prospect tab, click **New Rating** on the action bar. Enter “Forbes” in the **Source** field; “10/04/2002” in the **Date** field; “Excellent Prospect” in the **Category** field; “1.5 million” in the **Description** field; and “Rated one of the country’s most prolific investors” in **Notes**. Click **Save and Close**.

Rating for Sean A. Davenport

File Edit View Rating Help

Save and Close [Icons]

Source: Forbes

Date: 10/04/2002

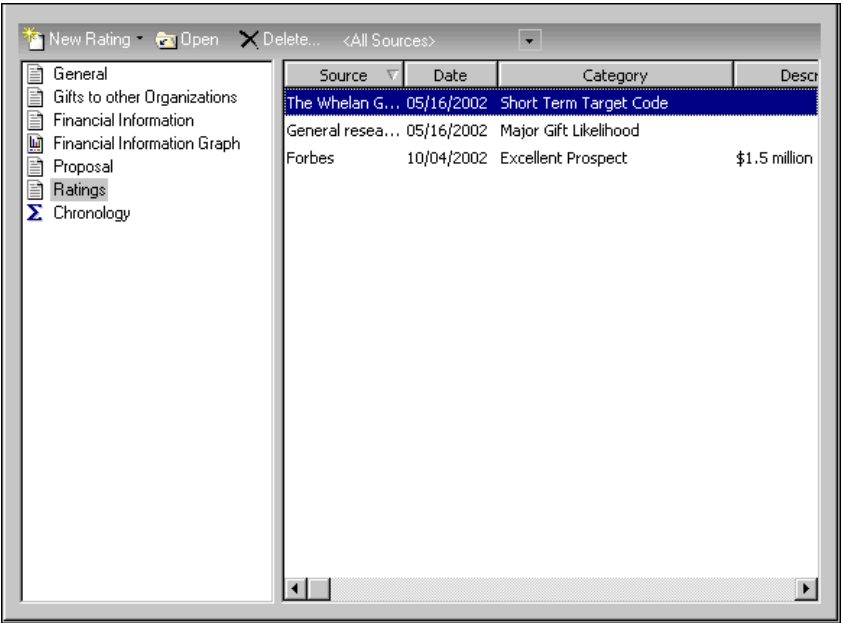
Category: Excellent Prospect

Description: \$1.5 million

Notes: Rated one of the country's most prolific investors.

Press F7 to zoom

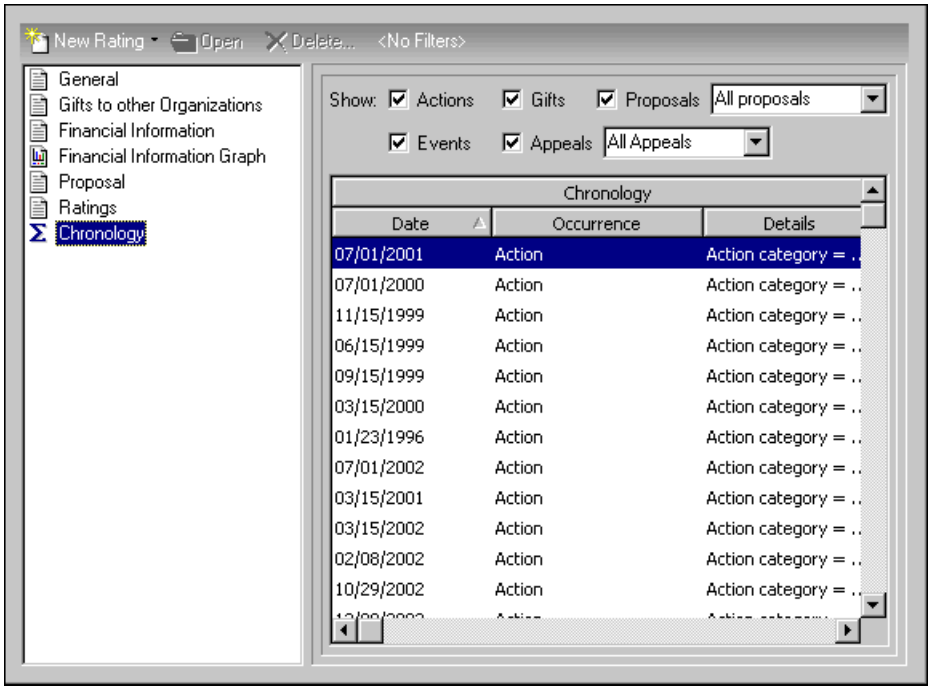
11. After you finish entering all of your ratings information, the new ratings appear in the **Ratings** category on the Prospect tab.



12. Select another category, or to close the constituent record and return to the Constituents page, click **Save and Close** from the menu bar.

Viewing a Chronology of Prospect Information

The last category listed on the Prospect tab offers a chronological overview of select information entered in the constituent records. This information is not limited to that entered on the Prospect tab.



In the **Show** frame, you can filter the information displayed in the **Chronology** grid. All information is arranged in ascending order by date. You can change to order to descending by clicking on the **Date** column heading.

Actions. Mark **Actions** if you want a list of all action records entered on the constituent record. If you want to open an action record, double-click on record you want to open. You can make limited changes to any record opened from the **Chronology** grid.

Events. Mark **Events** if you want a list of all events to which the constituent is associated. If you want to open an event record, double-click on record you want to open. You can make limited changes to any record opened from the **Chronology** grid.

Gifts. Mark **Gifts** if you want a list of all gifts records entered on the constituent record. If you want to open a gift record, double-click on record you want to open. You can make limited changes to any record opened from the **Chronology** grid.

Appeals. Mark **Appeals** if you want a list of all appeal records to which the constituent is associated through the Appeals tab of the constituent record. You can limit the appeals displayed by selecting Sent Appeals or Unsent Appeals. If you want to open an appeal record, double-click on record you want to open. You can make limited changes to any record opened from the **Chronology** grid.

Proposals. Mark **Proposals** if you want a list of all proposal records entered on the constituent record. You can limit the proposals displayed by selecting Funded Proposals. If you want to open a proposal record, double-click on record you want to open. You can make changes to any proposal record opened from the **Chronology** grid.

Linking Proposals to Gifts

Once your proposal proves successful and you receive a donation from your constituent, you need to record the gift in your database. This requires you to link a gift record to the proposal. In *The Raiser's Edge*, you can do this one of two ways — from the gift record or from the proposal record. The program also allows you to link one constituent's gift to another constituent's proposal.

If after creating a link, you discover a mistake, breaking links is also a matter of a few simple steps.

The **Link to gift** button located on the proposal record links the proposal to a constituent gift record.

Once a proposal is linked to a gift, you can use this same button to view the gift record to which the proposal is linked. This section takes you step-by-step through linking a proposal to a gift and breaking the link between a gift and a proposal from the proposal record. For a detailed explanation on linking a proposal to a gift and breaking the link between a gift and a proposal from the gift record, see the *Gift Records Guide*.

▶ Linking a proposal to a new gift record

Scenario: One month after your organization generated a proposal record seeking a \$25,000 donation from Sean Davenport for your Annual Campaign, Mr. Davenport makes a \$25,000 donation. You decide the best way to record the donation is to link it to a new gift record from the proposal record.

1. From the Prospect tab in Sean Davenport's constituent record, select the **Proposal** option in the treeview.

Note: For information about accessing the Prospect tab, see "Accessing the Prospect Tab" on page 6.

2. Select the proposal you want linked to a gift record, and select **Open** on the action bar. Sean Davenport's proposal record appears displaying the General tab.

The screenshot shows a window titled "Proposal for Sean A. Davenport" with a menu bar (File, Edit, View, Proposal, Help) and a toolbar. Below the toolbar are tabs for General, Action, Media, Attributes, and Notes. The General tab is active, displaying various fields for proposal details. At the bottom, there is a "Link to Gift..." button and a checkbox for "Proposal is inactive".

| Field | Value |
|-----------------------|-------------------------------|
| Name | Major Donor |
| Status | Cultivation |
| Purpose | Children's Research Endowment |
| Reason | Salary Bonus |
| Campaign | Annual Campaign |
| Type of gift | Cash |
| Fund | 2005 Annual Fund |
| Instrument | Cash |
| Solicitor(s) | Allison Andrews |
| Rating | Excellent |
| Deadline | 12/5/2005 |
| Date rated | 5/28/2004 |
| Amount asked | \$25,000.00 |
| Date asked | 5/5/2004 |
| Amount expected | \$25,000.00 |
| Date expected | 5/5/2005 |
| Amount funded | |
| Date funded | |
| Original amount asked | \$100,000.00 |
| Original date asked | 5/5/2004 |

3. Click **Link to Gift**. The Open screen appears displaying all existing gifts on the constituent's record.

The screenshot shows a window titled "Open" with a search bar and a table of gifts. The table has columns for Constituent Name, Gift Date, Gift Type, Gift Amount, and a fifth column with names. Below the table are search criteria fields and checkboxes. On the right side, there are buttons for "Open", "Cancel", "Add New", "Options", "Find Now", "New Search", "Previous Search", and "Expand Results".

| Constituent Name | Gift Date | Gift Type | Gift Amount | |
|-------------------|------------|--------------|-------------|-------------|
| Sean A. Davenport | 11/28/2005 | Gift-in-Kind | \$50.00 | Acquisition |
| Sean A. Davenport | 7/9/2002 | Cash | \$500.00 | Smith-Bro |
| Sean A. Davenport | 3/28/2002 | Cash | \$500.00 | 2002 Men |
| Sean A. Davenport | 3/12/2002 | Cash | \$1,000.00 | Annabelle |
| Sean A. Davenport | 7/6/2001 | Cash | \$1,000.00 | Smith-Bro |
| Sean A. Davenport | 3/25/2000 | Cash | \$1,000.00 | 2000 Men |

4. To link the proposal to an existing gift, select the gift and click **Open**. To create a new gift record for the proposal, click **Add New**.

For this scenario, click **Add New**. The New Gift screen appears.

5. Enter information about the gift. For a detailed explanation on completing these tabs, see the *Gift Records Guide*.
6. After you complete the New Gift screen, click **Save and Close**. The Amount to Apply screen appears.

7. Enter an **Amount to apply to this proposal**. You can not exceed the amount displayed in the **Available to Apply** frame. For the above example, apply the entire \$25,000.
 8. Select **OK**. You are returned to the proposal record. The program automatically completes the **Amount funded** and **Date funded** fields based on the information you entered on the gift record.
- Also, the **Link Gifts** button now reads **View Gifts**.

9. To close the constituent record and return to the Constituents page, click **Save and Close**.

Breaking the Link between a Gift and a Proposal

On occasion, you may need to break the link between a gift and a proposal. A gift and proposal may have been linked in error or the donor may decide to donate the gift to another project in your organization. When you break the link, neither the gift nor the proposal is deleted from your database.

► **Breaking the link between a gift and a proposal from the proposal record**

1. From the Prospect tab in a constituent record, select the **Proposal** option in the treeview.

Note: For information about accessing the Prospect tab, see “Accessing the Prospect Tab” on page 6.

2. Select the proposal in which you want break a link to a gift record, and select **Open** on the action bar. The Proposal screen appears, displaying the General tab.

Proposal for Sean A. Davenport

File Edit View Proposal Help

Save and Close Print Back Forward Home Help Search

General Action Media Attributes Notes

Name: Major Donor Status: Cultivation

Purpose: Children's Research Endowment Reason: Salary Bonus

Campaign: Annual Campaign Type of gift: Cash

Fund: 2005 Annual Fund Instrument: Cash

Solicitor(s): Allison Andrews Rating: Excellent

Deadline: 12/5/2005 Date rated: 5/28/2004

Amounts

Amount asked: \$25,000.00 Date asked: 5/5/2004

Amount expected: \$25,000.00 Date expected: 5/5/2005

Amount funded: \$25,000.00 Date funded: 5/25/2004

View Gifts Amount funded from gifts: \$25,000.00

☐ Proposal is inactive

Original amount asked: \$100,000.00 Original date asked: 5/5/2004

Click **Link to Gift**. Note: For information about accessing the Prospect tab, see “Accessing the Prospect Tab” on page 6.

3. Click **View Gift**. The Link Gift screen appears, displaying all gift records to which the proposal is linked.

Link Gift to Major Donor

New Linked Gift Open Break Link... Recalculate Close

| Gift Type | Gift Date | Amount Applied | Name |
|-----------|-----------|----------------|-------------------|
| Cash | 5/25/2004 | \$25,000.00 | Sean A. Davenport |

Total paid amount: \$25,000.00

4. Select the gift to which you want to break the link.
5. Click **Break Link** on the action bar. The gift is removed from the Link Gift screen.
6. To return to the proposal record, click **Close**.

7. To save the changes and return to the Prospect tab, click **Save and Close** from the proposal record.

Available Prospect Reports

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*.

Prospect Research Reports help you analyze the giving potential of future donors. Accessed through *Reports* on the Raiser's Edge bar, these documents track proposals presented to potential donors, track actions taken after a proposal has been entered, and compare actual proposal results with the projected results.

Outstanding Proposal report. This report provides a list of proposals presented to potential donors.

Proposal Follow Up report. This report tracks actions taken after you present a proposal, including the status and priority of the proposal.

Proposal Analysis. This report provides a comparison of proposal results with the expected outcome. It also tracks the number of days the proposal has been open. You can graph the total amount asked and the total amount funded.

Proposal Pipeline Summary. This is a cross-tab report that tracks proposal status and proposal solicitors.

Glossary



This section defines words and phrases you need to know as you work with *Prospect Research Management* and the Prospect tab. If you come across an unfamiliar term when reading this or any other book in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Adobe® Acrobat® Reader. *Adobe® Acrobat® Reader* is a third-party software application that enables electronic distribution of formatted documents. *Adobe® Acrobat® Reader* can be downloaded free from the Adobe Web site.

Action. An action is a specific step you take towards securing a donation from a constituent. It may include meetings, mailings, telephone calls, and e-mail messages. Actions allow you to build a history of the contacts and communications involved in creating a successful relationship with a constituent.

Action category. An action category defines the nature of the action. The categories are **Phone Call, Meeting, Mailing, E-mail, or Task/Other**. The action record has varying available fields depending on the category you choose. For example, if you choose **Phone Call**, you have a field to track the desired phone number and if you choose **Meeting**, you can specify the location.

Action notification reminder. A notification reminder allows *The Raiser's Edge* to remind you days, weeks, or months before an action is scheduled to occur. You can easily keep track of when to phone a constituent, send out a mailing, or meet a prospect for lunch. The notification can be set up to remind any user in your database.

Action record. An action record contains all the pertinent information surrounding an action. Every action in the database has its own record, which can be accessed from a constituent or event record, or directly through the Actions page.

Action status. Action status is a user-defined field that indicates the condition of the action. Examples are Open, Closed, Pending, Completed, and Not Completed. These statuses are used in building Action Tracks, creating queries, and generating reports.

Action track. An action track is a predefined sequence or series of actions assigned to a constituent or event record. Tracks are usually a combination of independent and dependent actions. The creation of dependent actions is based on the completion of a previous independent action. Tracks in essence simulate a hierarchal process or checklist for a constituent or event.

Action type. An action type is a user-created table that further defines the action category. Examples for **Mailing** are Follow-up letter, Welcome letter, Inquiry, and Birthday card.

Attribute. An attribute stores the qualities, characteristics, and preferences you associate with a constituent. An attribute serves as a way for you to identify a constituent's special interests, dietary preferences, or mailing requests. Attributes can include hobbies, interests, activities, committees, and important dates.

Business rule. A business rule is a system-wide preference you set in *Configuration* to customize standard procedures and requirements. With business rules, you can control functions and displays affecting all users in the program.

Constituent. A constituent is an individual or business who supports your organization by contributing time, money, and resources.

Constituent record. A constituent record is a record that maintains all aspects of an individual or organization, including biographical, relational, address, employment, and gift information.

Field. A field is a data entry box in which you add and store information on records in your database.

Home page. The Home page is a feature common to all *The Raiser's Edge* programs that provides a central location for quick and easy access to all areas of the program. Using links and tabs, you can customize your Home page to display records and functions you use most frequently.

Inactive action. An inactive action is no longer current or valid. We recommend this option in lieu of deleting the action record.

Inactive action track. An inactive action track is no longer current or valid. We recommend this option in lieu of deleting the action track.

Link. A link is a bond between two constituent records or between two or more parts of a record. Examples of links are spouse, education, business, or matching gift information. Links can also be "hyperlinks". With hyperlinks you can move from one part of *The Raiser's Edge* to another. For example, **Records**, **Query**, and **Reports** are all hyperlinks.

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

Option. An option is a preference you select that specifies defaults in *The Raiser's Edge*. Options are password-specific and follow the user, regardless of the workstation he logs into.

Password. A password is a series of typed characters required to access a computer program. This prevents unauthorized users from entering the program.

PDF (Portable Document Format). A PDF is a type of document viewed with *Adobe® Acrobat® Reader* that maintains its formatting and displays correctly on any output device. For example, *The Raiser's Edge* user guides are saved as PDFs and can be printed or accessed from the Help file, Online Manual page of the program, or the installation CD. PDF files contain hyperlinks so you can jump from topic to topic.

Preferences. See "Option" on page 68.

Proposal. A proposal is a gift request made by your organization. For example, if you discover a constituent has inherited \$1,000,000 and your organization decides to pursue the constituent for a donation, you can enter a proposal in the program, documenting a purpose for the donation; how much you requested and when; the campaign, fund, or appeal involved; and the proposal's status. You enter proposals on the Prospect tab in the constituent's record.

Prospect. The prospect is the source from whom your organization is cultivating a gift. For example, if you discover Dr. Robert C. Hernandez, M.D. has inherited \$1,000,000 and your organization decides to pursue him for a donation, Dr. Hernandez is a prospect.

Query. Query is the means by which you flag, group, and list selected records from your database. You can create dynamic and static queries specific to key areas of *The Raiser's Edge* based on a set of criteria you define. Although queries group entire records, you can limit and sort the output information included in query results. You can use saved queries to limit the information processed in *Records*, *Mail*, and other areas of *The Raiser's Edge*. Using queries in this manner reduces data processing time.

Query format. Queries can be created in one of two formats: Dynamic and Static. Static queries search the database and generate a list of records that match the specified criteria at a specific point in time. Dynamic queries search the database and return records that match the criteria using the current database of information.

Query type. Query types correspond to specific application records. These vary according to the program you are using. Your selection identifies the record type you want to query and makes a list of that record's fields available for filtering, output, and sorting.

Rating. A rating is a detailed analyses of gift and constituent prospects, usually performed by an outside research company. Ratings information is based on a study of wealth of individuals and organizations. The results usually include a category, such as target gift or asset level, along with an amount description suggesting what your organization can realistically expect to receive from the individual or organization.

Record. A record is a page in *The Raiser's Edge* from which you add, edit, and delete information such as names, addresses, relationships, gifts, memberships, events. *Records* is also an area in *The Raiser's Edge* where you can manage records.

Relationship. A relationship is defined as a familial or social association with a constituent. In *The Raiser's Edge*, you can track five different types of relationships for a constituent. These relationships are individual (friends, family members, associates), organization (businesses, clubs, employers), bank (financial institutions), education (schools, colleges, and universities), and assigned canvasser (individuals or organizations assigned to secure donations from the constituent).

Security. *Security* is a shared area in *The Raiser's Edge* in which you establish access rights for users. With *Security* you can control what specific groups of users are allowed to view, add, edit, or delete information.

Security group. A Security group is a group of users you define in *Administration*. You control security in *The Raiser's Edge* by creating groups with specific rights and assigning users to groups based on how much system access you want them to have. You can edit the rights of existing groups.

Server. A server is a powerful computer or processor dedicated to managing disk drives, printers, or network traffic. Servers are often dedicated, meaning they perform no tasks other than server tasks. For example, a dedicated database server for processing database queries has no other functions besides processing the queries.

Shortcut menu. A shortcut menu is a list of commonly used commands you can select to quickly perform actions or to display properties. **Open**, **Delete**, **Print**, and **Properties** are common shortcut menu items. To access shortcut menus, place your cursor in a field or grid and click the right mouse button.

Static query. A static query is a query that provides a record of query output that existed at the time you established the query. If you run a report two months later using the same query, the system restricts the new output to only the records from the original query. Data entered after the original query is disregarded.

Status bar. The status bar is a horizontal strip at the bottom of a screen that displays important messages to assist you in the program. For example, when the cursor is in a field with a table lookup available, "Press F7 for Table Lookup" appears in the status bar.

Tab. A tab is a design element that appears at the top of some screens in *The Raiser's Edge*. Tabs work to separate options into themed groups. For instance, you will find formatting options on various system Format tabs.

Table. A table is a field in which you can pre-define entries to save time and promote consistency for your data entry.

Table lookup. A table lookup is a table from which you can select and enter information into fields to speed data entry. To access a table lookup, place your cursor in a lookup field and press **F7**.

Title bar. A title bar is a horizontal strip at the top of a screen that identifies a program or file.

Toolbar. A toolbar is a horizontal strip with buttons that, when clicked, perform specific tasks. It is located under the title bar at the top of a screen. Common toolbar buttons include **New**, **Open**, **Save**, and **Print**.

Treeview. A treeview is a hierarchical list used throughout *The Raiser's Edge*. Treeviews differ from standard lists in that items in a treeview contain branches represented by dotted lines. Some treeviews automatically display all branches; for others you must click a plus sign to view the branches.

User option. See "Option" on page 68.

Wizard. A wizard is a utility that walks you through a process.

Index



A

- accessing, *see* navigating
- action category, defined 67
- action notification reminder, defined 67
- action record
 - action category 67
 - action track 68
 - defined 67
 - inactive 68
 - notification reminder 67
 - status 67
 - track 67
 - type 67
- action status, defined 67
- action tab 39
- action track
 - defined 67
 - inactive 68
- action type, defined 67
- action, defined 67
- adding
 - attributes 50
 - media objects 47
 - notes 52
 - ratings 57
- amount asked, editing 54
- attribute, defined 67
- attributes tab 50
- auto remind 42
- axis 25

B

- breaking link between gift and proposal 63
- business rules 9

C

- campaign 36
- category, action 67
- chart title 24
- classification 12
- color 23
- constituent record
 - prospect tab 1
- constituent record, defined 68

- constituent, defined 67
- custom graphs 22

D

- data order 26
- data source tab 22
- data to graph 22
- date asked, editing 54
- display minor gridlines 25
- display titles and values on axis 25

E

- edit original amount/date asked 54

F

- financial information
 - defined 17
 - graph 20
- fund 36

G

- general category 11
- general tab 35
- gift
 - breaking a link with a proposal 63
 - linking to a proposal 61
- gifts to other organizations, defined 14
- graph options tab 24
- graph types 22
- graphing financial information, defined 20

I

- inactive
 - action track, defined 68
 - action, defined 68

L

- labels 26
- legend 25
- link, defined 68
- linking a proposal to a gift 61

M

- manually entering prospect ratings data 57
- media object, defined 68
- media tab 47

N

- navigating
 - opening a prospect record 3
 - toolbar 3
- note tab 52
- notify 43

O

- opening, *see* navigating
- organization name column 16
- outstanding proposal report 65

P

- philanthropic interests, entering 14
- preferences, *see* user options
- proposal analysis report 65
- proposal follow up report 65
- proposals
 - breaking link with gift 63
 - defined 27, 68
 - deleting 32
 - entering new proposals
 - action tab 39
 - attributes tab 50
 - editing original amount/date asked 54
 - general tab 35
 - media tab 47
 - notes tab 52
 - linking to gift 61
 - opening 32
- prospect 1
 - defined 68
 - reports 65
 - tab
 - business rules 9
 - financial information
 - entering 17
 - graphing 20

- general 11
- gifts to other organisations 14
- graphing financial information, customize 22
- proposals
 - defined 27
 - deleting 32
 - entering new proposal 34
 - opening 32
- ratings
 - defined 54
 - deleting 55
 - manually entering new ratings data 57
 - opening 55
- summary information 60
- users options 8
- Prospect Research Management 1

R

- ratings
 - completing the ratings category
 - deleting an existing rating 55
 - manually entering new ratings data 57
 - opening an existing rating 55
 - defined 69
- relationships, defined 69
- reports
 - outstanding proposal report 65
 - proposal analysis report 65
 - proposal follow up report 65
- ResearchPoint integration 9

S

- set reminder for 43
- show legend 25
- solicitor 37, 42
- summary 60

T

- titles 24

U

- user options 8

W

- will not give to 14

X

X-axis 25

X-axis title 24

Y

Y-axis 25

Y-axis title 24

