

SYNC-RESULTS NONPROFIT CONSULTING GROUP, LLC

RAISER'S EDGE CONSTITUENT MANAGEMENT MANUAL

Reference Manual

SYNC-Results Nonprofit Consulting Group, LLC

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THE RAISER'S EDGE® GUIDE: CONSTITUENT MANAGEMENT
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INTRODUCTION

Take control today.

This document is a “how-to” for managing constituent information in The Raiser’s Edge®. It was written exclusively for SYNC-Results Non-profit Consulting Group Clients

CONSTITUENT DATA MANAGEMENT

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

FREQUENTLY USED TERMS

- **Addressee & Salutation** - An addressee or salutation is a format that defines how a constituent's name appears on envelopes, reports and labels.
- **Alias** - An alias is a secondary name or acronym used by a constituent. For example, General Electric may have an alias of GE.
- **Attribute** - An attribute stores the qualities, characteristics and preferences you associate with a constituent.
- **Constituent code** - A constituent code defines the relationship a constituent has with your organization and why the individual is in your database, such as Board Member or Donor.
- **Constituent ID** - A constituent ID is a unique identifier assigned to every constituent record.
- **Relationship** - A relationship is defined as a familial or social association with a constituent.
- **Solicit code** - A solicit code helps identify constituents as "exceptions to the rule" for your solicitors, such as "Do not phone at work" or "End of year mailing only."

ACCESSING CONSTITUENT RECORDS

Every constituent you enter into *The Raiser's Edge*® database has a separate constituent record.

OPEN A CONSTITUENT RECORD FROM THE CONSTITUENTS PAGE OF RECORDS

1. On The Raiser's Edge® toolbar, click **Records**.
2. Click **Constituents**. The Constituents page appears.
3. Click **Open a Constituent**. The Open screen for Constituents appears.
4. Under **Find Constituents that meet these criteria**, enter the criteria to use to **search for the constituent**.
5. **After you enter your search criteria**, click **Find Now**.
6. Select the constituent record to open.
7. Click **Open**. The constituent record appears.
8. After you view or edit the record, click **Save and Close** on the toolbar.

Open

Find: Constituent Search using query: <Default>

Open Cancel

Add New Options

Find Constituents that meet these criteria:

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

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

Find Now New Search Previous Search Expand Results

NAVIGATING A CONSTITUENT RECORD

BIO 1/ORG 1 TAB

The heart of the individual constituent record is the Bio 1/Org 1 tab. It contains general biographical information, such as name, address, telephone numbers, constituent ID, birth date and marital status. Required fields for new constituents are established in Business Rules.

New Individual

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media Actions Honor/Memorial Prospect Membership Events NetCommunity

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

Biographical

Last name: [] Aliases

First name: []

Middle name: []

Titles: [] []

Suffixes: [] []

Nickname: []

Maiden name: []

ID: []

Gender: Unknown []

Birth date: [] Age: []

Deceased? Date: []

Marital status: []

Spouse: []

Solicit code: []

Preferred Address: Home

Country: United States [] More...

Address lines: []

City: []

State: []

ZIP: [] DPC: []

Phones/Email/Links

Type	Number/Email Address

This constituent

Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

Requests no email

Education Business Bank

3/22/2010

SOLICIT CODE

The Solicit Code enables you to indicate how a constituent prefers to be reached (or not reached) by your organization. Examples of solicit codes include Do Not Solicit, Do Not Phone, and End of Year Solicitation Only.

IS A SOLICITOR

This should be marked for all those soliciting donations for your organization. You can set solicitor goals and track progress. A constituent must be marked as a solicitor to be an "Assigned Solicitor" to another constituent.

ADDRESS

The constituent's preferred address is the address that appears in the Bio 1 tab. Additional addresses are viewed on the Addresses tab.

To enter a new preferred address:

1. Go to Constituent in the menu bar and select "Copy preferred address to alternate."
2. Update the new address in the Bio 1 tab.
3. Click on the Addresses tab and open the previous address.
4. Change the address type to "previous" and enter an end date.

BIO 2/ORG 2 TAB

The Bio 2/Org 2 tab stores additional biographical information for the individual constituent. This includes birthplace, religion and constituency code(s).

The screenshot shows the 'New Individual' window with the 'Addresses' tab selected. The 'Addresses' tab is highlighted with a red checkmark. The 'Receipt type' dropdown is set to 'One receipt per gift'. The 'Constituent Codes' table is empty.

Constituent Codes			
Description	Code	Date From	Date To

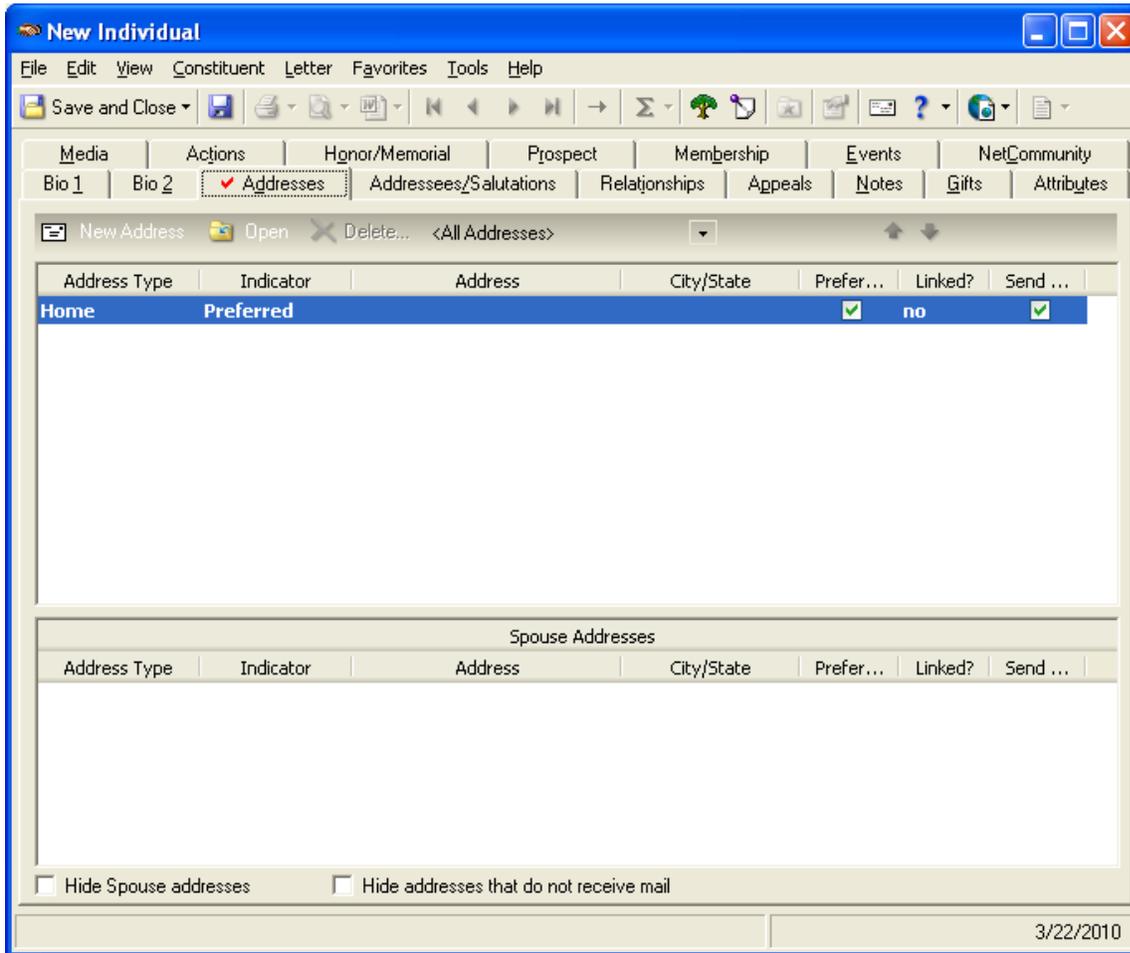
CONSTITUENT CODE

A constituent code defines the relationship a constituent has with your organization and why the individual is in your database, such as Board Member or Donor. Each constituent should be assigned a constituent code. These codes are very useful in reports and can be used to segment your donors into categories.

ADDRESSES TAB

The Addresses tab displays all stored addresses for a constituent and spouse. To change an address, see information about the Bio 1/Org 1 tab.

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ADDRESSEES/SALUTATIONS TAB

The Addressees/Salutations tab is available only for individual constituent records because this tab tracks how you display a person's name in mailings and reports.

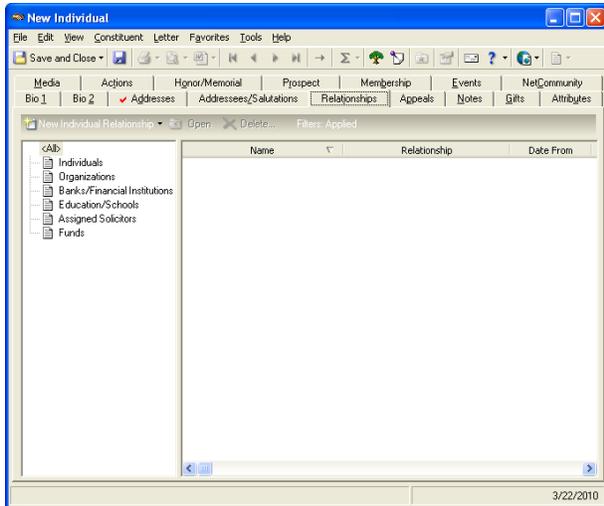
The screenshot shows the 'New Individual' window with the 'Addressees/Salutations' tab selected. The interface includes a menu bar, a toolbar, and a tabbed interface. The 'Addressees/Salutations' tab is active, showing fields for 'Primary addressee' and 'Primary salutation', each with an 'Editable?' checkbox. Below these is a table titled 'Additional Addressees and Salutations' with columns for 'Type', 'Addressee/Salutation', and 'Editable?'. A 'Test Label Truncation...' button is at the bottom left, and the date '3/22/2010' is at the bottom right.

Additional Addressees and Salutations can be established in Configuration. Each individual record should have at minimum a Primary Addressee and Primary Salutation. This helps tremendously when creating letters, envelopes and labels.

RELATIONSHIPS TAB

The Relationships tab lists a constituent's relationships and affiliations, both with individuals and organizations. A constituent may even have a special affiliation with a fund.

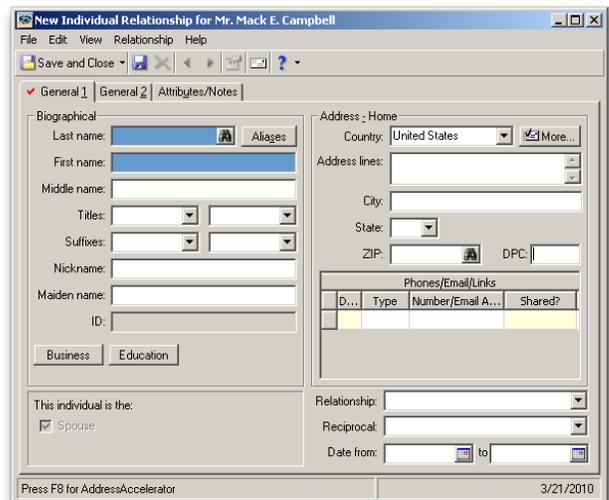
By tracking these relationships, you can compile a network of people and companies in a constituent's life. Tracking these connections enhances your database of prospective donors.



ADDING NEW RELATIONSHIPS

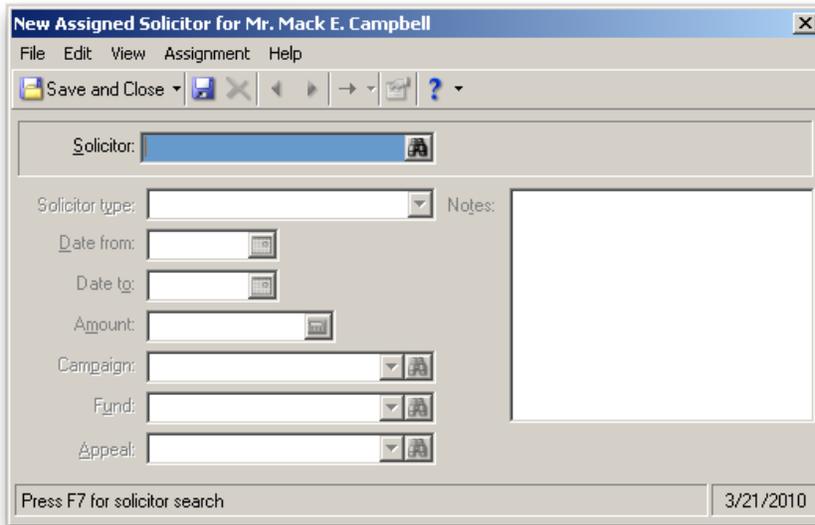
To add a new relationship:

1. Click the New Relationship drop-down and select the relationship type:
 - a. Individuals
 - b. Organizations
 - c. Bank/Financial Institutions
 - d. Education/Schools
 - e. Assigned Solicitors
 - f. Funds
2. Using the binoculars (the constituent search tool), search for the relationship as it may exist in the database. If you do not link to the constituent existing in **The Raiser's Edge®**, you may create a relationship that will only "live" on this record.
3. Enter the remaining relationship information, specifically the Relationship and Reciprocal (e.g., Employee, employer, respectively).



ADDING SOLICITORS

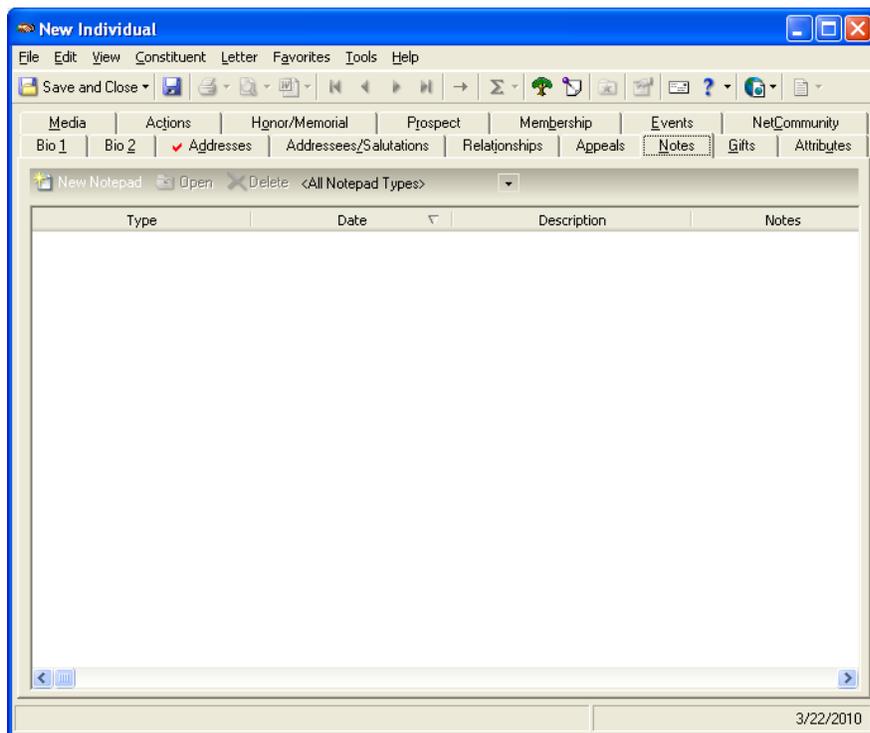
Solicitors can be assigned to constituents to help managers track a gift officer's portfolio. Once linked to their portfolio, solicitors can track their progress through solicitor reports and dashboards.



The image shows a software dialog box titled "New Assigned Solicitor for Mr. Mack E. Campbell". The window has a menu bar with "File", "Edit", "View", "Assignment", and "Help". Below the menu bar is a toolbar with a "Save and Close" button and several navigation icons. The main area contains a "Solicitor:" field with a dropdown arrow and a search icon. Below this are several input fields: "Solicitor type:" (dropdown), "Date from:" (calendar icon), "Date to:" (calendar icon), "Amount:" (text field with currency icon), "Campaign:" (dropdown with search icon), "Fund:" (dropdown with search icon), and "Appeal:" (dropdown with search icon). To the right of these fields is a large "Notes:" text area. At the bottom left, there is a status bar that says "Press F7 for solicitor search". At the bottom right, there is a date field showing "3/21/2010".

NOTES TAB

For each constituent, you can store multiple notepads that quickly summarize important information you need to remember. The Notes tab stores this information in one location.



NOTE TYPES

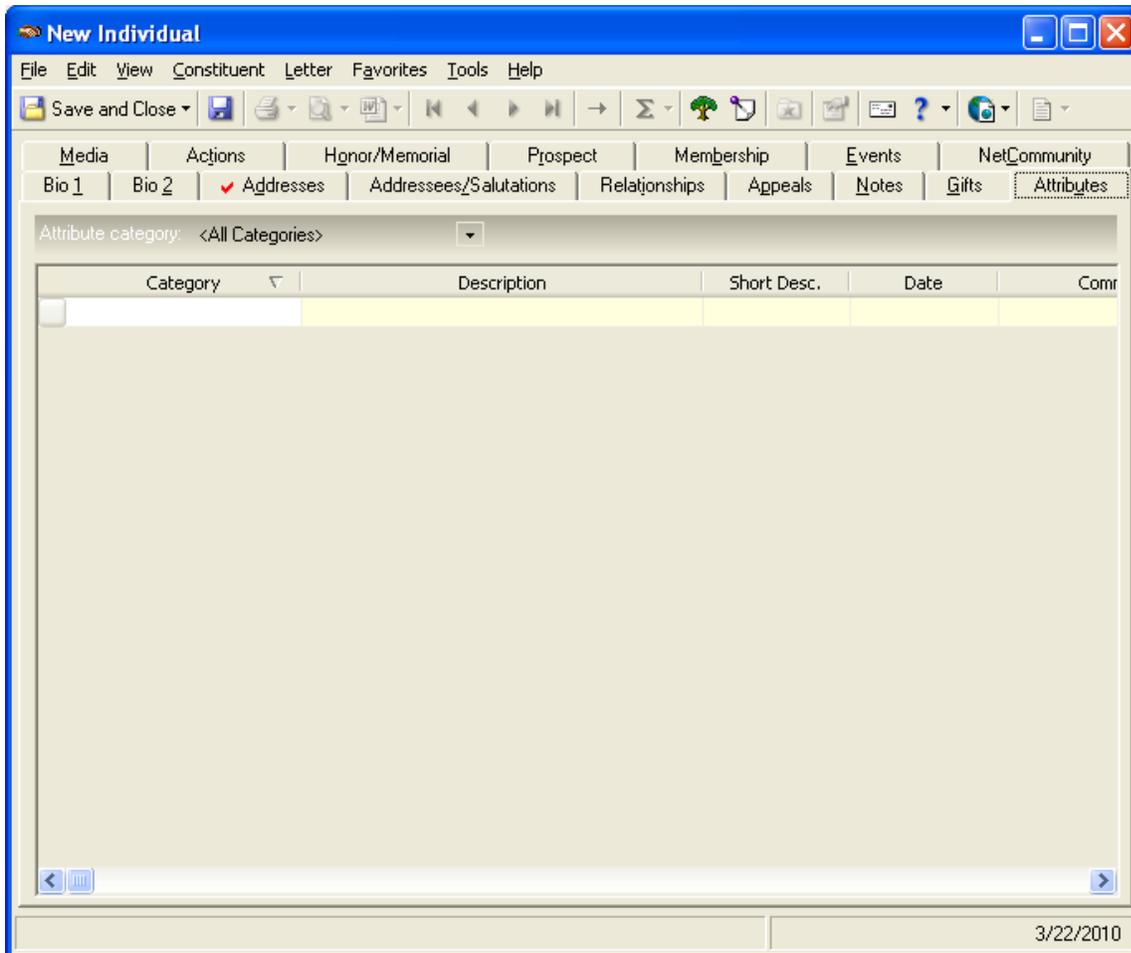
- Administrative Changes – used for making note of changes to the record; typically done when using global change
- Change of Address – used to further explain a change of address
- Financial Information – used to denote a constituent's financial information or information related to financial transactions that are not housed elsewhere in **The Raiser's Edge®**
- Personal Information – used to add personal information about the constituent (e.g., obituary, marriage announcement, birth of child)

GIFTS TAB

The Gifts tab lists all gifts contributed to your organization by the constituent. You can quickly see gift dates, gift types, gift amounts and funds for which the gifts were designated.

ATTRIBUTES TAB

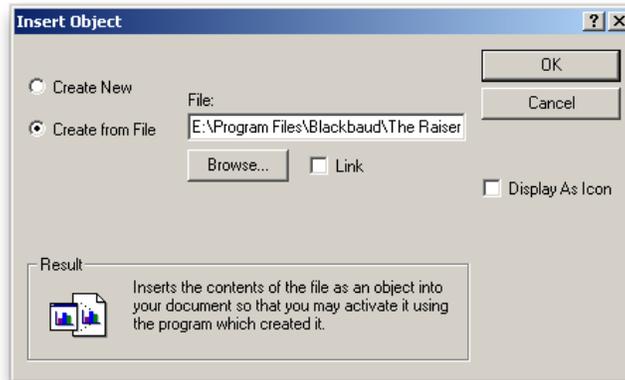
The Attributes tab helps you identify the qualities, characteristics, and preferences associated with a constituent. These attributes may include hobbies, interests, activities, committees and important dates.



MEDIA TAB

The Media tab stores media objects relating to a constituent. These objects can include newspaper clippings, letters, pictures and graphs. These files can be stored on with the constituent's record on **The Raiser's Edge®** server.

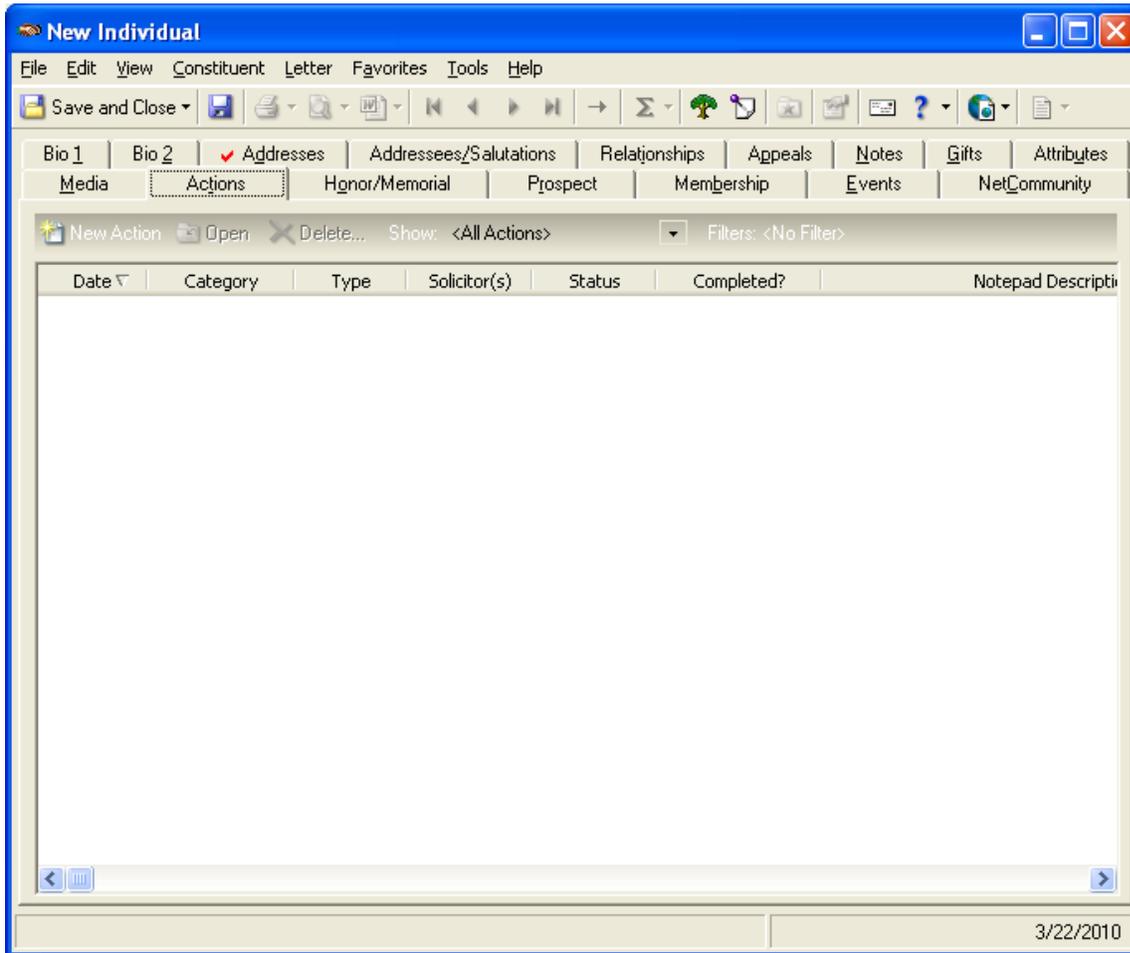
To add media to a record, simply click "New Media," choose Create from File, click Browse, and select the appropriate file.



Note: Large files can clog and slow down **The Raiser's Edge®** server. Be wary of adding large files. For large files, add a note related to the file path and file description. This will ensure your server is running at optimum efficiency.

ACTIONS TAB

The Actions tab tracks the various communications between your organization and the constituent. These actions can include meetings, mailings, phone calls, email and advocacy.



To enter an action:

1. On the Actions tab, click "New Action."
2. Select the action type and enter the action information.
3. Auto-reminders may be established for future events.
4. Add additional notes about the event, like the conversation you had with a donor, on the Notes tab.
5. Save and Close.

HONOR/MEMORIAL TAB

This tab helps you keep track of tributes in your database. Tributes are set up to honor, celebrate, or memorialize people, organizations or events.

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The screenshot shows a software window titled "New Individual" with a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. The "Honor/Memorial" tab is selected in the ribbon. Below the ribbon, there are checkboxes for "Constituent is an honor/memorial", "New Tribute", "Open", and "Delete...". A table with columns "Type", "Description", "Date F...", and "Date To" is present. At the bottom, there are labels for "Total number of gifts given to this tribute:" and "Total amount of gifts given to this tribute:" with a "Gifts" button.

Type	Description	Date F...	Date To
------	-------------	-----------	---------

Total number of gifts given to this tribute:
Total amount of gifts given to this tribute: Gifts

ADDING A NEW CONSTITUENT

The following are required fields when creating a new constituent record. Required fields can be edited in Configuration.

REQUIRED FIELDS

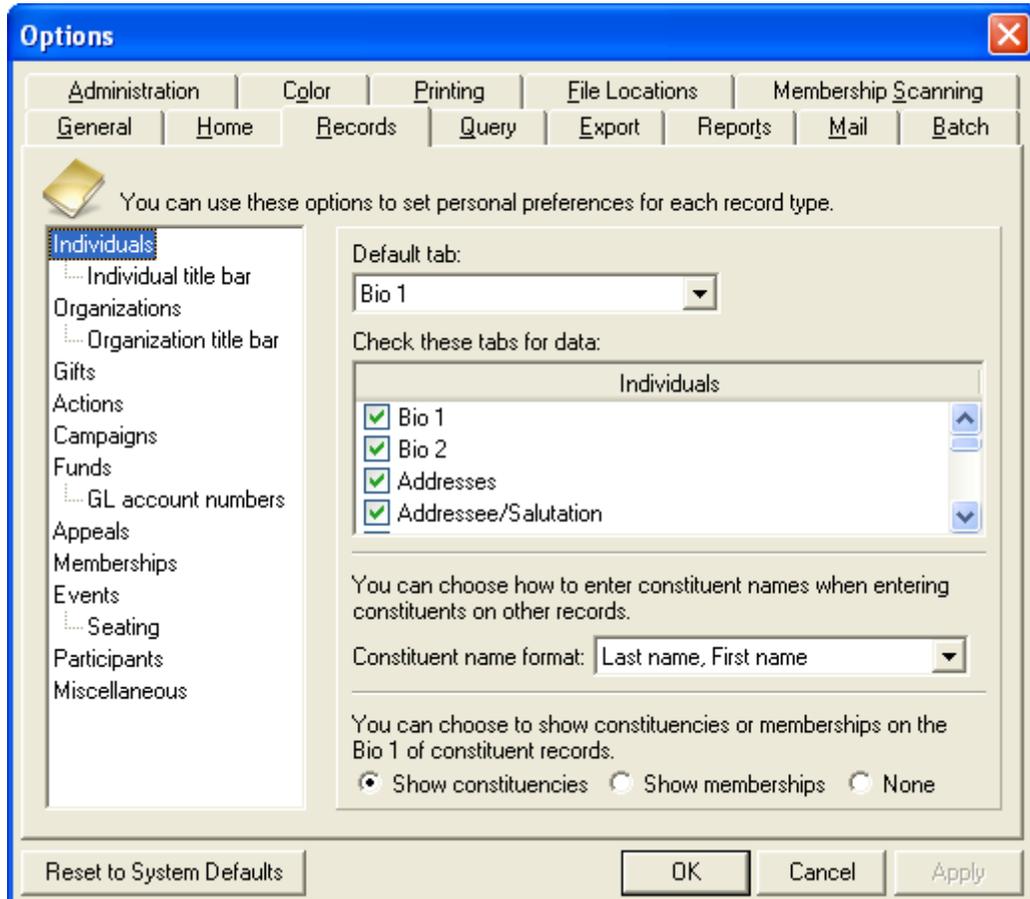
- Last Name
- First Name
- Title
- Address Lines
- City, ST ZIP
- Constituency Code
 - Individual
 - Foundation
 - Corporation
 - Affinity Group
 - Board
 - Staff
 - Etc.
- Primary Addressee
- Primary Salutation

IMPORTANT ADDITIONAL FIELDS

- Spouse Info
- Marital Status
- Phone Types
- Actions
- Relationships
 - Business (Employer)
 - Other Relationships
 - Account Manager

USER OPTIONS

Each user of **The Raiser's Edge®** can customize settings in Events You can access User Options anywhere in The Raiser's Edge®. On the menu bar, click Tools and select User Options. Event options are available on the Records tab.



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