Raiser’s Edge Beginner Training Guide

I. What is Raiser’s Edge?

Raiser’s Edge is a program that Advancement uses to manage its Alumni/Donor database. Primary records that Raiser’s Edge calls “Constituents” are added for individuals and organizations that have certain relationships with Clemson. A new constituent record is added for every new alumnus of Clemson, for every individual or organization that donates to Clemson and in a few other instances. On each constituent record, there are tabs in which we store all the pertinent data that we have for the person or organization. That includes biographical and address information, contact info, giving history, education information, event participations, prospect info and many other pieces of data. Raiser’s Edge provides us tools for entering, grouping, reporting, exporting, importing and securing the data.

II. Home Module and Favorites

The primary function of the home page is to give Raiser’s Edge users access to their favorites and action reminders. Favorites are quick access functions such as opening a record or document, running a query or other functions that you want to do quickly. Liken the Favorites section in for Raiser’s Edge to a desktop on your PC or Mac.

To add a favorite - go to the “Favorites” menu at the top of any record/query/export/report and click “Add to Favorites”. You can then name the favorite and choose a “default action” if appropriate. The default action will depend on the favorite you add. For example, you can choose to print, export or preview a report or just run a query. You can use the “open” action to just open the item.

To add a document as a favorite - Drag the document from your desktop into the favorites section on your home page. Then name the favorite and then choose a folder from the “create in” drop down menu to specify where in your favorites to store it.
III. **Records Module/Searching for Records**

Click on the “Records” module from the list of modules on the left. You will see a list of record types on the left including Constituents, Gifts, Actions, Campaigns, Funds, etc. The default record type that appears after opening the module is “Constituents”. Remember that constituents can be individuals or organizations.

**To Search for a record** - Select the type of record you wish to search for (constituent is default) and then click on “Open a Constituent” (or other record type). A search screen will pop up and you’ll be able to enter values for any of the search fields listed. For constituents, a typical starting point is to enter last name, first name, city and state. Click enter or “find now” on the right to run the search. If you don’t see the constituent in the list or see several with the same name, try refining your search. You can search using partial values as well (you don’t have to enter the whole first and last name for example). Use the Constituent ID to search for records if you can because it’s a unique identifier for each constituent (meaning each constituent has a unique constituent ID).

![Search Screen](image)

**Using Search Options and Wildcards**

The check boxes at the bottom of the search screen narrow or expand the results of your search based on corresponding fields in the record. In order to search thoroughly, it’s typically best to check **All the boxes** except **Display Inactive Constituents** and **Exact Match Only**. This will ensure that you don’t accidentally miss anyone. *In cases where you enter a constituent ID to find a record and multiple records appear, temporarily check Exact Match only and re-execute the search. Be sure to uncheck it afterwards.*

**Wildcards** are keys that are used to replace either one character or a string of characters in your search. The question mark (?) replaces one character, while the asterisks (*) replaces a string of characters. So for example, let’s say I knew the organization had “Agriculture” in the name. I could enter *Agriculture* and the system would return all records that have agriculture in the name.
IV. Navigating the BIO 1 & BIO 2 Tabs

The BIO 1 tab is the default tab you will see when you open a constituent’s record. This tab shows biographical information about constituents including: name, title, alias, age, gender, nick name and if the constituent is deceased. A link to the constituent’s Spouse relationship information is also found on BIO 1 (bottom left).

Solicit Codes
indicate that a constituent should or shouldn’t be contacted for certain reasons. Solicit codes are located at the bottom left of the BIO 1 tab. For instance, if a constituent says that they don’t want to be solicited, we would mark them with a code of “No Solicitation”. These codes are important if you plan on contacting or mailing to a constituent. Examples: No contact wanted, No Marketing Mail or Calls, No Clemson World Wanted, Botanica Gardens Only, Omit from all Telephone lists.

Address & Contact Information
The constituent’s Preferred address and contact information appear on the right side of BIO 1. Notice that there’s a tab for telephone numbers and a separate tabs for emails, faxes, etc. The phone type “Phone” will usually be the best phone number and the type “E-mail” will be the the best email address for a constituent.

Other BIO 1 Options
At the bottom right of the BIO 1 tab, there’s a group of check boxes that are used to indicate a few pieces of information about the constituent. Inactive is used to track duplicate constituents in the system. If you see that a record is marked as inactive, close the record and find the other record that’s not inactive. The Gives Anonymously checkbox indicates that a constituent doesn’t want to be recognized publicly for their gifts. Requests no Email means that a constituent does not want to emailed by us and Has no valid address means that we have no valid postal address for that constituent.

BIO 2 Tab- The Bio 2 tab is where constituent codes are stored. Constituent Codes are identifiers that are used to organize constituents into broad groups. These are high level classifications meaning there’s only a hand full of groups. A few examples are: Alumnus, Alumnus Parent, Friend, Current Parent, Business and Industry, Faculty and Staff.
V. Navigating the Gifts Tab and Gift Records

When you first open the gifts tab, you will see a list of all the constituent’s gifts with details about the gifts such as gift date, amount, fund, type and balance.

To add or remove columns which appear on the gifts tab - hover over any of the column headings and right click. Choose the “Columns” option and pull any fields that you want to see into the “Display these columns” section on the right. If you want to remove columns, pull them back to the left. You can also sort gifts by any column by clicking on that column. **To open a Gift record, double click on the row of the gift.**

After you open a gift record, you’ll see the Gift tab which displays general information about the gift.
Fields on the Gift Tab of a Gift Record

- **Gift Type**: Type of gift: Cash, pledge, stock/property, gift-in-kind, other, recurring gift, planned gift
- **Gift Subtype**: A Clemson defined sub-classification of a gift (payroll deduction, bequest, online) for examples
- **Gift Amount**: The $ amount of the gift (amount on check or pledge agreement)
- **Gift Date**: The date the foundation deposits the gift
- **Fund**: This is the account(s) which the gift is designated to
- **Solicitors**: The assigned solicitor(s) from the relationships tab will automatically populate this field.
- **Acknowledge**: This indicates that a gift has or has not been acknowledged by the Annual Giving Office
- **Receipted**: This indicates that a gift has or has not been receipted.
- **Letter Code**: Annual Fund Indicator (First This Year, First Ever, First in 5+ years, Additional)

Pledges and Pledge Payments

A pledge is a promise to pay a specified amount in either one or multiple installments. If you look on the installments tab of a pledge type gift record, you can see detailed information about the schedule and how many payments have been made so far. **Pay-Cash** type gifts are cash gifts that have been applied to pay off a pledge.

Soft Credits

A Soft Credit enables multiple constituents to get credit for one gift without double counting the receipt amount. For instance, if you gave a $1000 gift, you may want your spouse to get credit along with yourself. Since the check is in your name, you would get the hard credit (and tax receipt) and your spouse would get the soft credit. Soft credits are entered on the soft credit tab of the gift record. Spouses are automatically soft credited for all gifts made by the other spouse. Owners of companies will also often be soft credited for gifts given by the company.

Matching Gifts and Matching Gift Soft Credits

Sometimes individuals are affiliated with or employed by organizations/companies that match individual giving. Before a matching gift can be entered in the system, the original gift from the individual must be entered on their own record. Based on that gift being entered, an MG-pledge is automatically created and saved on the company’s record. When the payment comes in from the company, it’s applied to the MG-pledge from the Organization’s record and pays off the MG pledge.

Previewing a Constituent’s Gift Summary

To produce a quick overview of a constituent’s giving, run the gift summary report. To view the summary, first open up the constituent whose giving you want to see. From the record, go to the “View” menu and select “Summaries > Gift Summary”. From the parameter screen, choose a date range and any other appropriate filters (or leave defaults for all gifts and dates) and then click “Finish” at the bottom right. The “Giving Statistics” portion lists the constituent’s first, latest and greatest gifts. The “Breakdown” portion lists the constituent’s total giving by fiscal year. Click on the link below for a detailed description of how the breakdown columns are calculated.

H:\Develop\Blackbaud\Policies & Procedures\Gift Summary Columns.doc

VI. Fund Records and Viewing a Fund Summary

The Fund record stores information about the account the fund was set up for and people give to. To open a fund record, go to Records>Funds>Open a Fund and then search using the fund ID or fund description. The general tab of the fund gives you some basic information such as the ID/Description, start date, category and purpose. If you go to the Attributes tab of the fund, you can see attributes that tell which college and department money to the fund goes to and also the GL Credit number (CUBS #).

Viewing the Fund Summary

The fund summary gives you an overview of the gifts given to that fund. To run the fund summary, from the fund record go to “View>Summaries>Fund Summary”. Then if needed, select appropriate filters (such as gift dates or solicitors) and click Finish. The fund summary reads similarly to the constituent gift summary. To see exactly how the columns are totaled, click the F1 key on your keyboard while viewing the summary.
VII. Actions and Action Reminders

The purpose of an Action is to record communication or an interaction between a Clemson representative and one of our constituents. Here are some examples of actions we would want to record: A Development Officer meets with a donor to make a solicitation, a birthday greeting is sent, or a major donor joined you for a President’s Box game.

### Fields on the General Tab
- **Action Category**: The communication method (phone call, meeting, mailing, email, task/other)
- **Action Type**: Clemson defined drop menu to categorize what the action is for
- **Action Date**: Date the communication or interaction occurs or will occur
- **Solicitors**: The solicitor(s) who is doing the action
- **Action Status**: The purpose of the action (related to the prospect status)
- **Completed**: Check this box when the action is completed

### Notes Tab
To add details about what happened during the meeting, phone call etc, enter a new notepad on the notes tab of the action (click “new notepad”). Include a clear, concise description (in the description field) and enter extra details in the notes box. The note type of **Contact Report** is used to track DO’s communication with prospects/donors.
Action Reminders

Action reminders enable you to remind yourself (and others) about actions that will occur in the future. For reminders to work, the action must be in the future (meaning the action date must be a future date). Also, make sure the action isn’t marked as completed. On the right side of the general tab of the action, check the “Auto-Remind” box. Then click on the Notify button and select the Raiser’s Edge user name(s) associated with the people you want to remind (yourself and others if necessary). At the bottom of the notify window you can select “Raiser’s Edge Reminders, Outlook Appointments or Both”. Choosing Raiser’s Edge reminders will create a reminder in the action reminder section on your home page. Choosing Outlook appointments will send an appointment reminder to your Outlook account. In the “Set Reminder For” box, select the number of days/weeks/months ahead of time (before the action date) that you want to be reminded.
VIII. Relationships Tab

The relationships tab houses individual, organization, education and solicitor relationship records of the constituent. By default, you will see all relationships when you first go to this tab. You can select a single type by clicking on it from the menu on the left (Individuals, Organizations, Education/Schools, and Assigned Solicitors). To open a specific relationship record, double click on the row where it’s listed.

Individuals - spouse, parents, children, siblings, friends, associates
Organizations - Employers, VIP Groups, Professional Associations, MG Companies
Education/Schools - Education record of an Alum’s time at Clemson. Major, Class Year, College, Clubs, etc.
Assigned Solicitors - Dev. Officer who is assigned to the constituent, “Primary Manager” is the main solicitor

NOTES for Education Relationships
1. After opening an education relationship, click on the “attributes” tab of that record to view clubs, sports, frats, student organizations, student body, awards and other info about the student’s time at Clemson
2. If a constituent has multiple education relationships, they likely have multiple degrees. A student will have a Clemson University relationship for each Clemson degree that they have earned.

IX. Attributes

Attributes are flags on a record that store data that doesn’t fit into the hard coded fields that Raiser’s Edge provides. There are attributes on constituent, gift, action and several other types of records. They are stored on the attributes tab of each record. Here are some commonly used constituent attributes on constituent records:

Alumni Club - The geographic Alumni Club that the constituent belongs to
Cde_This_Yr_Gifts - Constituent’s current Annual Giving Club
Cde_Last_Yr_Gifts - Constituent’s Annual Gift Club from Last Year
Donor Services Pool - This attribute = to “Yes” indicates a constituent is handled/stewarded by Donor Services
Num_Consec_History - The current consecutive number of years that a constituent has given
Perfect Donor - Indicates if a constituent has given every year since they graduated
Major Gift Society - Lists the Cumulative Society that a person belongs to
Legacy Society - Indicates that a person is in the Legacy Society based on a Planned Gift to Clemson
Primary Society - Indicates a person’s primary society for reporting if they belong to more than one
X. Events Tab

The Events tab lists events that a constituent was invited to. Each “Participant” record holds information related to the constituent’s participation for that event. Each row on the events tab is a separate participant record and you can open and view details for each by clicking on the corresponding row.

Fields on a Participant Record

Event Name - Name of the event
Start Date - Date of the Event
Invite? - Indicates that a person was invited
Response? - Indicates a person’s response to the invitation (not always populated)
Registration? - Indicates that a person plans to attend and has paid registration fees (if necessary)
Tags/Cards Button - Shows how a participant’s nametag will appear and if it’s been printed
Guests Button - Lists guests that a participant will bring
Group - If an event is part of a group, the group will be listed in this field
Registration Fees Tab - Lists any registration fees that are required for the event
Amount Paid (from Registration Fees tab) - Lists amount of registration fees paid
XI. Constituent Profiles Report

The constituent profile is a very flexible report that lets you select different pieces of information about a constituent to report on. To run the report, open a constituent’s record and go to File>preview>constituent profile. When the box that says “Select a Parameter File” pops up, either select an existing profile or click on “Add New” on the right to add a new one. By default, the report will only show information for the constituent record you’re in. You can click on “include>select records” to choose a query if you wish. If running an existing profile, don’t change the parameters because others users run the report. If creating a new profile, go to the Profile Contents tab and select the information that you need to see. Notice that you can select options for each section of data. When you’re finished setting up the report, click on preview or print at the bottom right. If you save the report parameter, you can select it from the list of existing reports the next time you run a constituent profile (instead of adding a new one each time).

XII. Help and Resources

F1 Help Key & Other Resources

While working anywhere in Raiser’s Edge, press the F1 key to access a help topic for that area. For example, if you were in a gift record and didn’t know what the split gift tab was for, you could go to the split gift tab and click F1. A help screen will pop and give you an overview of split gifts and how they are used.

Knowledgebase/E-Learning Library

Search Blackbaud’s knowledgebase for solutions to Raiser’s Edge questions/issues/errors. You have to request a login to Blackbaud’s website from the IT team in order to access the knowledgebase. Knowledgebase

The E-Learning Library is a great resource that lets you take interactive lessons on different functions within Raiser’s Edge. It also requires a login to Blackbaud’s website which can set up by the IT Team. E-Learning Library

Contacts

To request biographical/address changes to a record, email Alumni_Records-L@clemson.edu