Raiser’s Edge Procedure for President’s Suite Invitations

1. The person(s) you wish to invite **must have a constituent record in Raiser’s Edge**. Even if you are inviting a Corporate Contact, you must make sure that person has a constituent record in Raiser’s Edge. If you are inviting a corporate contact, see the section on **Corporate Contacts** on page 2.

2. Go to the constituent’s record (who you want to invite) and go to the Attributes tab.

3. Add the following 2 attributes to the constituent’s record by going to the end of the list of attributes and populating the blank rows.

   **First Attribute**
   - **Category Column**: Select “President’s Suite 2016” from dropdown
   - **Description Column**: Select game that you want to invite constituent to from dropdown
   - **Date Column**: Enter today’s date

   **Second Attribute**
   - **Category Column**: Select “President’s Suite Invited By 2016” from dropdown
   - **Description Column**: Select DO’s name (who is making the invite) from the dropdown
   - **Date Column**: Enter today’s date
   - **Comments Column**: Enter a brief justification for why you’re inviting the person

4. Record a quick bio for President Clements to use on game day by adding a note on the Notes tab of the constituent record:

   A. From the Notes tab, click “New Notepad” and fill out the following fields:
   B. Date = Today’s date
   C. Note Type = President’s Box
   D. Title = Bio
   E. Description = 2016
   F. In the Note body, type a brief two-sentence bio for President Clements.
   G. Save the note.

   Be concise and clear when entering the note. Record information that is high enough in quality that you would be happy for President Clements to see it.
Data from this notepad will be used to provide a BIO report to President Clements for each game. Your notes will be shown like the example below:

**Corporate Contacts - How do I make sure my corporate contact is a constituent in RE?**

A. Search for the individual by last and first names (if you are not sure how to do this, please contact Josh Isengard (jisenga@clemson.edu) for a Raiser’s Edge refresher training.

B. If your prospect/donor is not found during your search, a constituent record will need to be created for him/her by data entry. Send an email to Susan McCall (smccall@clemson.edu) requesting that a constituent record be created for invitations to the President’s Box. Supply her with the Title, Formal First and Last Names, nickname if applicable, preferred mailing address, and the company with which the individual is employed or associated with.