

The Raiser's Edge™

Tribute Data Entry Guide

020112

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Contents



WHAT IS IN THIS GUIDE?	v
TRIBUTE	1
Frequently Used Terms	2
Navigating in Honor/Memorial Tracking	2
Toolbar	6
User Options for the Honor/Memorial Tab	7
Overview of Tribute Information	7
Managing Tributes	11
INDEX	23

What Is In This Guide?



In the *Tribute Data Entry Guide*, you learn how to manage your honor/memorial records (when you have the optional module *Honor/Memorial Tracking*). Using the Honor/Memorial tab, you can track detailed information about donations given in honor, celebration, or memory of an individual or organization. You can also learn about the following:

- “Adding a Tribute from the Honor/Memorial tab” on page 11
- “Viewing gifts given to a tribute” on page 15
- “Editing a tribute from the Honor/Memorial tab” on page 17
- “Entering additional honor/memorial acknowledgees” on page 19
- “Deleting a tribute from the Honor/Memorial tab” on page 21

How Do I Use These Guides?

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

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

User Guides. 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** 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.

Tribute



Frequently Used Terms	2
Navigating in Honor/Memorial Tracking	2
Accessing the Honor/Memorial Tab	3
Toolbar	6
User Options for the Honor/Memorial Tab	7
Overview of Tribute Information	7
Honor/Memorial Tab	7
Tribute Record Screen	10
Managing Tributes	11
Adding Tributes	11
Viewing Tribute Gifts	14
Editing Tributes	17
Adding Additional Acknowledgees for Tributes	18
Deleting Tributes	21
Procedures	
Accessing the Honor/Memorial tab of a constituent record	3
Adding a tribute from the Honor/Memorial tab	11
Viewing gifts given to a tribute	15
Editing a tribute from the Honor/Memorial tab	17
Entering additional honor/memorial acknowledgees	19
Deleting a tribute from the Honor/Memorial tab	21

Note: The optional module *Honor/Memorial Tracking* provides reports and summaries to help you review and evaluate the status of your donations. For more information about these reports, see the *Reports Guide*.

The optional module *Honor/Memorial Tracking* helps you effectively manage your honor/memorial records in *The Raiser's Edge*. You can access tribute information from the Honor/Memorial tab of a constituent record. The Honor/Memorial tab provides you the ability to track detailed information about donations given in honor, celebration, or memory of an individual or organization.

If you use the optional module *Honor/Memorial Tracking*, the Honor/Memorial tab appears on all your constituent records. From this tab, you can add tributes, edit tributes, and view gifts given to a tribute, depending on user rights established from the **Security** link of *Administration*. *The Raiser's Edge* accommodates multiple acknowledgees and tribute types for your honor/memorial records. For example, you can have a tribute honoring Betty Smith for her volunteer work in the community. At the same time, you can have a tribute honoring the birth of her new son. To create tributes for a constituent, the constituent must first be marked as an honor/memorial. In addition, a variety of tribute reports and summaries are available to help track donations made in honor, celebration, or memory of constituents.

In this chapter, you will learn how to access, add, and work with tribute information to better organize and track the details of your constituent donations.

Frequently Used Terms

Note: When you purchase optional modules from Blackbaud such as *Honor/Memorial Tracking* or *Event Management*, you are given a code. You must enter this code to “unlock” or activate the optional module. For more information, see the *Program Basics Guide*.

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

Acknowledgee. An acknowledgee is a family member, friend, associate, or honoree that should be notified when a gift is donated to honor, memorialize, or celebrate an honor/memorial constituent. For example, you create a tribute William Smith on his 50th birthday. William Smith and his wife Margaret want to know when gifts are donated to the tribute so they can thank their friends personally. William and Margaret Smith are the acknowledgees for the tribute. An acknowledgee does not have to be a constituent in your database, but must be a relationship of the honoree.

Honor/memorial (honoree). An honor/memorial is an individual or organization being honored, memorialized, or celebrated by gifts donated to your organization. For example, Rebecca Lawrence has passed away and her family requests that you receive gifts on her behalf. To receive gifts on Rebecca's behalf, you need to designate Rebecca Lawrence as an honor/memorial on her constituent record.

When you designate a constituent as an honor/memorial, the constituent is now an honoree in your database. You can refer to the constituent as an honor/memorial or as the honoree receiving gifts.

Tribute. A tribute explains the reason why you are honoring, memorializing, or celebrating a constituent. For example, Jane McBeth is participating in a walk-a-thon to support your organization. Many of her friends are donating gifts to your organization to support Jane's participation in the walk-a-thon. On Jane's constituent record, you can create a tribute “in support of” Jane's efforts so you can record the gifts received on her behalf.

Navigating in Honor/Memorial Tracking

You access tribute information from the Honor/Memorial tab of a constituent record. On the Honor/Memorial tab, you can set up new tributes designating the reason gifts are given in honor, celebration, or memory of the individual or organization.

Accessing the Honor/Memorial Tab

Before you begin tracking information about your tributes in *The Raiser's Edge*, you must first access the Honor/Memorial tab of the constituent record. To do this, you need to add or open the constituent record from the Constituents page of *Records*. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

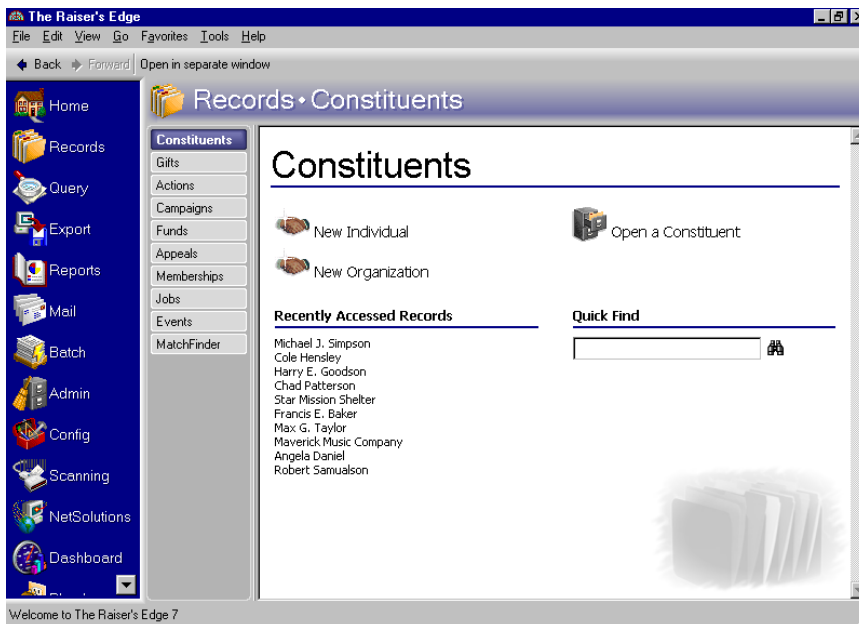
▶ **Accessing the Honor/Memorial tab of a constituent record**

To manage tribute information, you must first access the Honor/Memorial tab of a constituent record.

1. On the Raiser's Edge bar, click **Records**.

Note: When *MatchFinder* is installed on your computer, a **MatchFinder** button 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 Gifts screen of the Matching Gifts tab of the gift record. For more information about *MatchFinder*, see the *MatchFinder Guide*.

2. Click **Constituents**. The Constituents page appears.



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

The screenshot shows the 'Open' window with the following search criteria:

- Find: Constituent
- Search using query: <Default>
- Last/Org name: Taylor
- First Name: Max
- City: Pittsburgh
- State: PA
- Address lines: (empty)
- Constituent ID: (empty)
- SSN: (empty)
- ZIP: (empty)
- Membership ID: (empty)
- Class of: (empty)
- Bank acct. no.: (empty)
- Credit card no.: (empty)

Options checked:

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

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

4. In the **Find Constituents that meet these criteria** frame, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. The criteria you can use include the constituent's first or last name, ID, Social Security Number, membership ID (if you use the optional module *Membership Management*), bank account number, address lines, city, state, ZIP, class of format (if you use the optional module *Alumni Tracking*), and credit card number.
5. Click **Find Now**. If the search criteria you entered matches a constituent in the database, the constituent information appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one record or many records.

The screenshot shows the 'Open' window with the following search results:

Constituent Name	Address Block	City, State	Constituent ID
Max G. Taylor	3327 Dawson Street	Pittsburgh, PA	77

Options checked:

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

1 record found.

Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding the constituent.

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

Max G. Taylor

File Edit View Constituent Letter Favorites Tools Help

Save and Close

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

Biographical

Last name: Taylor Aliases
 First name: Max
 Middle name: Jerome
 Titles: Mr.
 Suffixes:
 Nickname:
 Maiden name:
 ID: 77
 Gender: Male SSN: 229-13-4356
 Birth date: 07/05/1940 Age: 65
 Deceased? Date:
 Marital status: Married
 Spouse: Michelle Taylor
 Solicit code:

Preferred Address: Home

Country: United States
 Address lines: 3327 Dawson Street
 City: Pittsburgh
 State: PA Pennsylvania
 ZIP: 15208 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	403-555-4579	Shared
<input checked="" type="checkbox"/>	Cell Phone	403-555-0077	Cannot be Sh..

This constituent

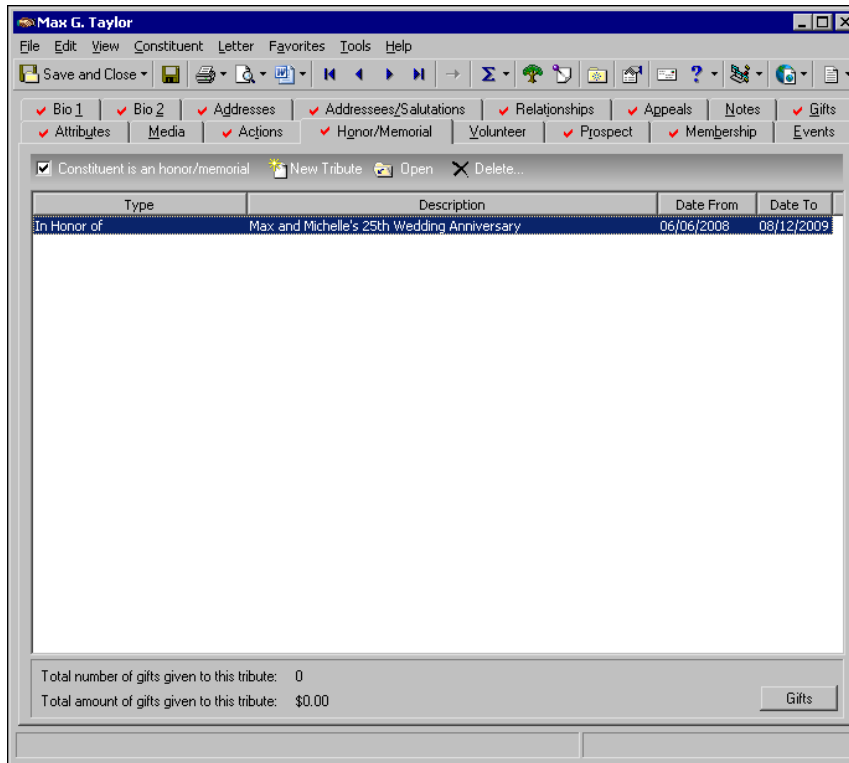
Is inactive Is a solicitor Details
 Gives anonymously Has no valid addresses
 Requests no email

Grandparent (04/04/2001 -); Alumnus (06/01/1962 -)

Education Business Bank

Note: You can maximize and resize your constituent records.

8. Select the Honor/Memorial tab.

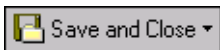


9. After you enter or edit the appropriate tribute information, click **Save and Close** on the toolbar. For more information about adding tribute information, see “Adding Tributes” on page 11.

Toolbar

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. With the optional module *Honor/Memorial Tracking*, you should be familiar with two toolbars. The first is the constituent record toolbar. The Honor/Memorial tab is part of the constituent record screen, so you should be familiar with the constituent record toolbar. For more information about the constituent record toolbar, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

The second toolbar you should be familiar with is the tribute record toolbar. The tribute record toolbar is located under the constituent record’s tabs. All menu bars are discussed in detail in the *Program Basics Guide*.



Save and close the tribute 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 tribute record



Delete the tribute record



Previous tribute



Next tribute



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

User Options for the Honor/Memorial Tab

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 on the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that 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. You can set user options that affect the Honor/Memorial tab on a constituent record. For example, you can specify the Honor/Memorial tab as the default tab when opening a constituent record. This means that every time you open a constituent record, you automatically default to the Honor/Memorial tab. You can also specify that a check mark appear on the Honor/Memorial tab if any information is entered on the Honor/Memorial tab. For more information about User Options, see the User Options chapter of the *Program Basics Guide*.

Overview of Tribute Information

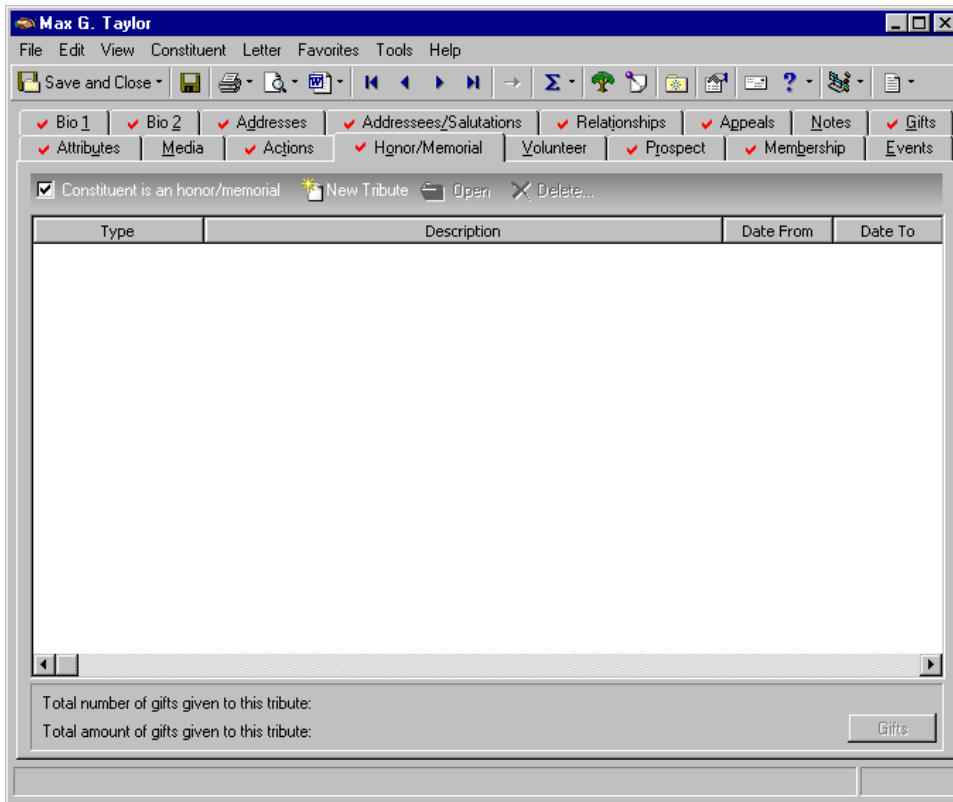
The functions for the optional module *Honor/Memorial Tracking* are divided into two sections. From the Honor/Memorial tab of a constituent record, you can add, edit, and delete tributes. From the **Gifts** link of a constituent record, you can add, edit, and delete gifts and gift amounts for your tributes.

When a donor gives an honor/memorial gift to a tribute for an individual or organization, you can enter the gift and select the record of the constituent being honored or memorialized. Each gift can be attributed to multiple honor/memorial records. For more information about adding gifts or linking a gift to an honor/memorial, see the *Tribute Gifts Guide*.

Honor/Memorial Tab

If you use the optional module *Honor/Memorial Tracking*, the Honor/Memorial tab appears on each constituent record. From this tab, you can designate a constituent as an honor/memorial and set up tributes for a constituent.

Before you can work with new tribute information for a constituent or an organization, you must first mark the **Constituent is an honor/memorial** checkbox. This designates an individual or organization as an honor/memorial.



Once you establish a tribute, the **New Tribute** button is enabled for you to begin entering tribute information. Once you create and save a tribute, the **Open** and **Delete** buttons are enabled so you can manage your tribute information. The grid displays all tributes created for the constituent. For more information about adding tributes, see “Adding Tributes” on page 11.

You can also view a tribute gift history by highlighting the tribute and clicking the **Gifts** button. For more information about viewing a tribute gift history, see “Viewing Tribute Gifts” on page 14.

You have the option to view an Honor/Memorial Gift summary for a constituent. The Honor/Memorial Gift summary gives detailed information about the gifts given to a specific constituent. An Honor/Memorial Gift summary can be created by selecting **View, Summaries** from the menu bar of any tab while a constituent record is open.

The screenshot shows a software window titled "Summary for Robert C. Hernandez". It features a menu bar (File, Edit, View, Summary, Help) and a toolbar with icons for Close, Print, Refresh, and Help. Below the toolbar, there is a "Tribute:" dropdown menu set to "In Special Recognition of - Dr. Robert Hernandez, Pediatrician of the..." and two checkboxes for "Exclude largest gift" and "Exclude smallest gift".

	Date	Amount	Type	Fund
First	01/19/2007	\$5,000.00	Cash	Building Fund
Latest	11/23/2007	\$1,000.00	Cash	Building Fund
Greatest	01/19/2007	\$5,000.00	Cash	Building Fund

Summary statistics: Average: \$1,333.33, Median: \$750.00, Total gifts: 6, Total years: 1, Mode: Multiple Modes, Consecutive years: 0.

Breakdown: Fiscal year (dropdown), Customize (button)

Fiscal Year	Received	Pledged	Paid	Written...	Balance	Total Committed	No. Gifts
<all>	\$7,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$8,000.00	6
After 12/2006	\$7,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$8,000.00	6
01/2006 - 12/2006	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0
01/2005 - 12/2005	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0
01/2004 - 12/2004	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0
Prior to 01/2004	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0

From the Honor/Memorial gift summary, you can select to view a specific tribute and its gift date, amount, and type. The Breakdown grid offers ways to break down the tribute into further detail. You can also graph the summary results and export them to other areas of *The Raiser's Edge* or to other programs. For more information about the Honor/Memorial gift summary and graphing, see the *Summaries Guide*. You can also create a more detailed Honor/Memorial summary in *Reports*. For more information, see the *Reports Guide*.

Tribute Record Screen

You can access a tribute record from the Honor/Memorial tab of a constituent record. A tribute details the reason why you are honoring, memorializing, or celebrating the constituent. For example, in the **Tribute type** field, you can set up a tribute celebrating a constituent's birthday or a constituent on an anniversary. Other examples of tribute types you can use are "For The Birth Of" and "For The Scholarship Of." You can also add new tribute types directly from the **Tribute type** field by typing your new entry in the **Tribute type** field. After you tab through the field, a message appears asking you to add the new tribute type to the drop-down menu. You can also click on the field name **Tribute type** to access the Tribute Types screen. From the Tribute Types screen, you can work with tribute type information, such as inserting, adding, and deleting tribute types.

Acknowledgees			
Name	Relationship	Reciprocal	Letter
Max G. Taylor	self	self	
Melanie Taylor	Daughter	Father	Tribute Thanks

In the **Description** field, you can further define the tribute. The description you enter appears the same way on mailings and reports so make sure you enter the information carefully. You can also specify how long you want the tribute to last by using the **Date from** and **Date to** fields, and enter any additional notes for the tribute in the **Notes** box.

In the **Default Fund** field, you can select a default fund for the tribute. When you select a fund in this field, each time you create a gift for the fund, the default fund you specify on this screen defaults into the **Fund** field on the gift record. For example, you create a tribute honoring Betty Smith on her retirement. You want the default fund for this tribute to be the Building Fund. To designate the Building Fund as the default fund for this particular tribute, in the **Default Fund** field, select "Building Fund". When a constituent gives a gift to Betty's tribute, Building Fund automatically defaults into the **Fund** field on the constituent's new gift record. You can also click on the field name **Default Fund** to access the Open screen to search for a fund.

In the **Acknowledgees** grid, you can enter the names of family members, friends, associates, or to be notified when a gift is donated. Relationships do not have to be constituents in the database. Relationships will automatically default into the **Acknowledgees** grid if the **Acknowledge this individual for hon/mem gifts** checkbox is marked on the relationship record. For more information about relationships, see the Relationships chapter of the *Constituent Data Entry Guide*.

Relationships of the honor/memorial having the **Acknowledge this individual for hon/mem gifts** checkbox marked on their record automatically default into the **Acknowledges** grid for the honor/memorial. However, a constituent must be marked as an honor/memorial before the **Acknowledge this individual for hon/mem gifts** checkbox can appear on the relationship record. Once you mark a constituent as an honor/memorial, you must save the record. Before you create the tribute, you must mark the **Acknowledge this individual for hon/mem gifts** checkbox on any relationship records for the honor/memorial that you want to automatically default into the **Acknowledges** grid and save the record. After you save the record and open a new tribute for the honor/memorial, the acknowledges will default into the **Acknowledges** grid. For more information about adding a tribute, see “Adding Tributes” on page 11.

The **Letter** column designates what type of letter the acknowledgee receives when donations arrive for the tribute. This information is used when preparing the honor/memorial acknowledgement letters in *Mail*. For more information about honor/memorial acknowledgement letters, see the *Mail Guide*.

Managing Tributes

Note: When you add a tribute for more than one person in your database (for example, a married couple), make sure you add the tribute to only one of their records. After selecting which record to add the tribute, be consistent by adding future information to the same tribute record.

You can add, edit, and delete tributes from a constituent’s Honor/Memorial tab. Accurately managing your tributes from the Honor/Memorial tab is helpful when you later add gifts for tributes.

Adding Tributes

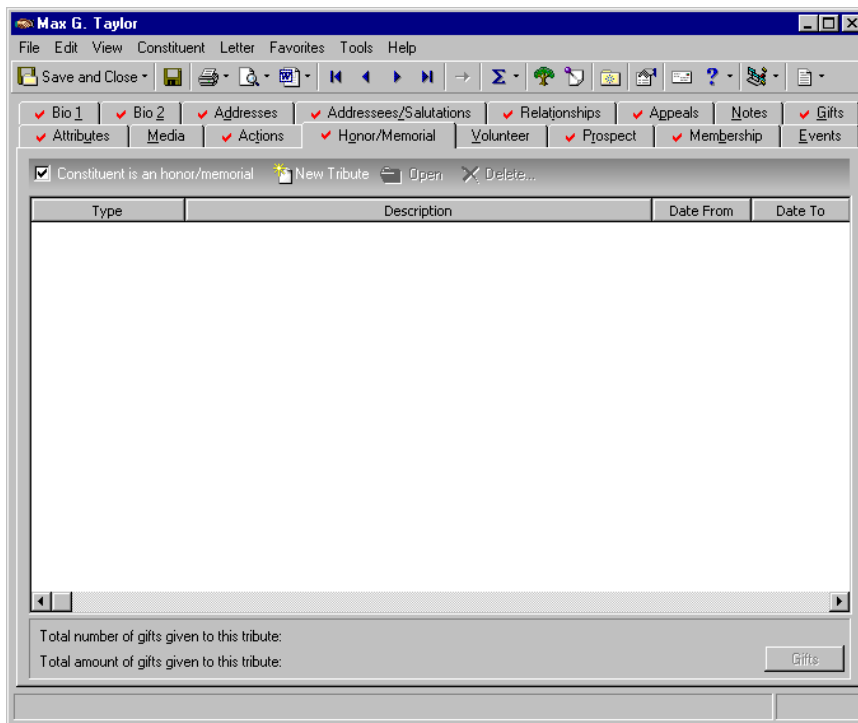
You can easily add tributes to your database from the Honor/Memorial tab of a constituent record. When an honor/memorial gift arrives, you need to set up a tribute designating why gifts are given in honor, celebration, or memory of the individual or organization. You can receive several gifts for one tribute.

▶ Adding a Tribute from the Honor/Memorial tab

Scenario: Mrs. Elizabeth Ashton is donating a sum of money to your organization in honor of Max and Michelle Taylor’s 25th wedding anniversary. Melanie Taylor, Max and Michelle’s daughter, has requested to be acknowledged every time gifts are given to the tribute. The first thing you need to do is set up a tribute in honor of Max and Michelle. Because Max and Michelle are both constituents in your database, you should add the tribute to only one of their records.

Note: If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

1. From Max Taylor's constituent record, select the Honor/Memorial tab. For more information on how to open a constituent record, see "Navigating in Honor/Memorial Tracking" on page 2.



2. Mark the **Constituent is an honor/memorial** checkbox so the database recognizes Max as the honor/memorial.
3. On the action bar above the Honor/Memorial grid, click **New Tribute**. The Tribute screen appears.

Acknowledgees			
Name	Relationship	Reciprocal	Letter
Max G. Taylor	self	self	
Melanie Taylor	Daughter	Father	Tribute Thanks

Honor/Memorial is an acknowledgee
 Gifts may be given to this tribute

Press F7 for table lookup

Note: The **Date to** field can be left blank when the tribute has no ending date.

4. In the **Tribute type** field, enter "In Honor Of".
5. In the **Description** field, enter "Max and Michelle's 25th Wedding Anniversary".

Note: Auto Complete occurs when you type the first few letters of information in a field, and the rest of the information automatically defaults in. For example, if you type “In H” in the **Tribute type** field, then “In Honor Of” automatically defaults.

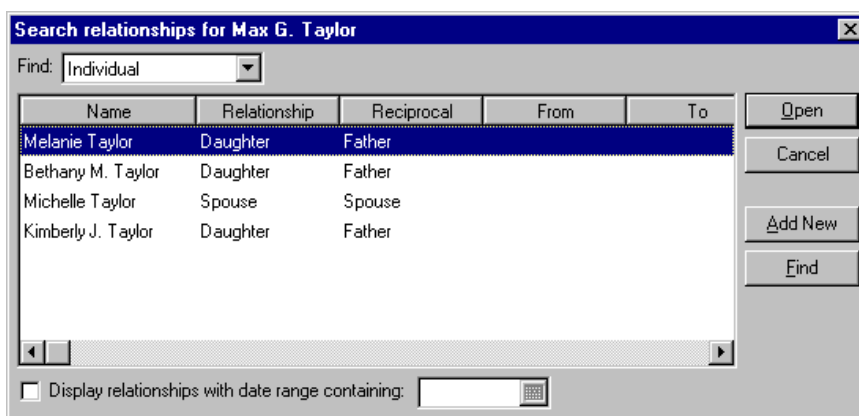
6. In the **Date from** field, enter 06/06/2008 because you want to accept gifts a few months before the anniversary.
7. In the **Date to** field, enter 08/12/2009 because this is the date you want the tribute to end. The ending date is Max and Michelle’s next anniversary date.

The date in the **Date to** field indicates when you want the tribute to end. However, *The Raiser’s Edge* still allows you to enter tributes past that date. For more information on Tribute gifts, see the *Tribute Gifts Guide*.

8. In the **Default Fund** field, select “2009 Annual Fund”. Max and Michelle want gifts given in their honor to the 2009 Annual Fund.
9. In the **Notes** box, enter “Max and Michelle request contributions be sent to the 2009 Annual Fund in lieu of presents.”
10. Mark the **Gifts may be given to this tribute** checkbox. If this checkbox is unmarked, no gifts can be associated with the tribute.
11. To ensure Max is listed in the **Acknowledgees** grid and is notified every time a gift is donated to the tribute, mark the **Honor/Memorial is an acknowledgee** checkbox. Max Taylor’s name now appears in the grid.
12. Tab through the remaining columns to access a new row.

Note: All relationships having the **Acknowledge this individual for hon/mem gifts** checkbox marked on the General 1 tab of their relationship record automatically default into the **Acknowledgees** grid.

13. Click inside the **Name** column of the next empty row in the **Acknowledgees** grid to access the binoculars so you can search for Melanie Taylor.
14. Click the binoculars. The Search relationships screen appears.



Note: An acknowledgee does not have to be a constituent in your database, but must be a relationship of the honoree.

15. Click **Find**. A list of relationships for Max Taylor appears.
16. Select “Melanie Taylor” and click **Open**. Melanie’s name and relationship information appears in the **Acknowledgees** grid.

When you add Melanie Taylor to the **Acknowledgees** grid, the **Acknowledge this individual for hon/mem gifts** checkbox is marked on Melanie’s relationship record.

17. In the **Letter** column, enter “Tribute Thanks”.

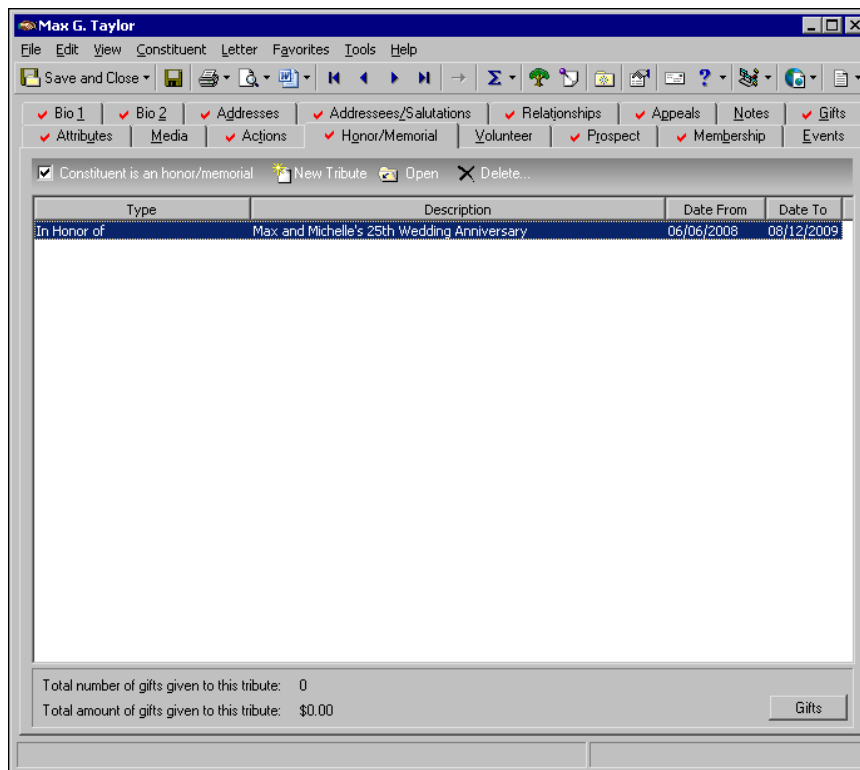
You are sending a Tribute Thanks letter to Melanie who requested to be notified as an acknowledgee.

Note: A constituent must be an honor/memorial in order for the **Acknowledge this individual for hon/mem gifts** checkbox to appear on an honor/memorial relationship record.

18. On the New Tribute screen, click **Save and Close** on the toolbar. You return to the Honor/Memorial tab of Max’s constituent record.

Note: You can use the Honor/Memorial Acknowledgement Letters mail task to create tribute letters. For more information on how to prepare tribute letters, see the *Mail Guide*.

Max and Michelle’s tribute now appears in the Honor/Memorial grid.



Viewing Tribute Gifts

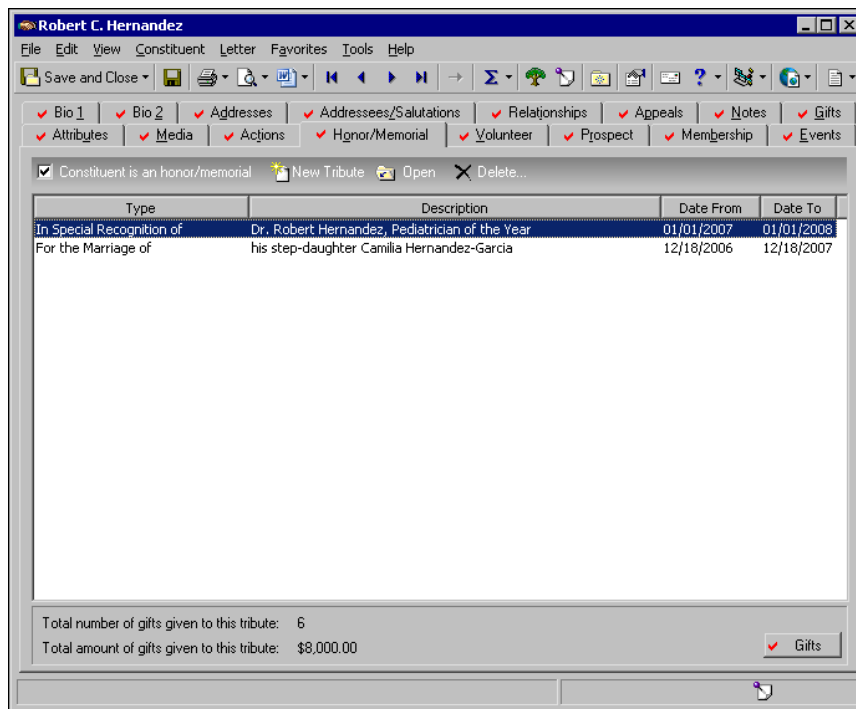
The total number and total amount of gifts given to the tribute display at the bottom of the Honor/Memorial tab. You can use the **Gifts** button to view gifts given in honor or memory of a particular tribute. To view gift information, click the **Gifts** button from the grid in the Honor/Memorial tab of the constituent record. You can also access gift information by clicking **Gift Details** from the Tribute record.

To enable the **Gifts** button on the Honor/Memorial tab, you must highlight a tribute in the grid on the Honor/Memorial tab. Otherwise, the **Gifts** button remains disabled.

▶ Viewing gifts given to a tribute

Scenario: You receive gifts in special recognition of Dr. Robert Hernandez. You want to know how many gifts have been given and how much money has been donated to Robert’s tribute. You can easily view the details of all gifts given to this tribute. If you have not already set up a tribute, see “Adding Tributes” on page 11.

1. From Robert Hernandez’s constituent record, select the Honor/Memorial tab. For more information on opening a constituent record, see “Navigating in Honor/Memorial Tracking” on page 2.
2. In the **Honor/Memorial** grid, highlight the tribute “In Special Recognition Of Dr. Robert Hernandez, Pediatrician of the Year”.



3. On the action bar, click **Open**. The Tribute screen appears.

Name	Relationship	Reciprocal	Letter
Robert C. Hernandez	self	self	

4. Click **Gift Details** in the bottom right corner of the tribute screen. The Gift Details screen appears with the gifts' **Date**, **Amount**, **Type**, **Campaign**, and **Fund** information listed.

Date	Amount	Type	Campaign	Fund
11/23/2007	\$1,000.00	Cash	Playground Campaign	Building Fund
10/17/2007	\$500.00	Cash	Playground Campaign	Building Fund
08/03/2007	\$1,000.00	Pledge	Playground Campaign	Building Fund
04/24/2007	\$250.00	Cash	Playground Campaign	Building Fund
02/18/2007	\$250.00	Cash	Playground Campaign	Building Fund
01/19/2007	\$5,000.00	Cash	Playground Campaign	Building Fund

Date, **Amount**, **Type**, **Campaign**, and **Fund** are the default columns. By right-clicking on the column name, you can add column names to the grid or edit existing columns.

From the Gift Details screen, you can open a gift for viewing or editing if you have user rights, you can export the gifts grid to *Excel*, and you can print gift information. For more information about exporting data, see the *Query & Export Guide*. For information on linking gifts to a tribute, see the *Tribute Gifts Guide*.

5. When you finish viewing the gifts for this tribute, click **Close** on the action bar. You return to the Honor/Memorial tab of Robert's constituent record.

Editing Tributes

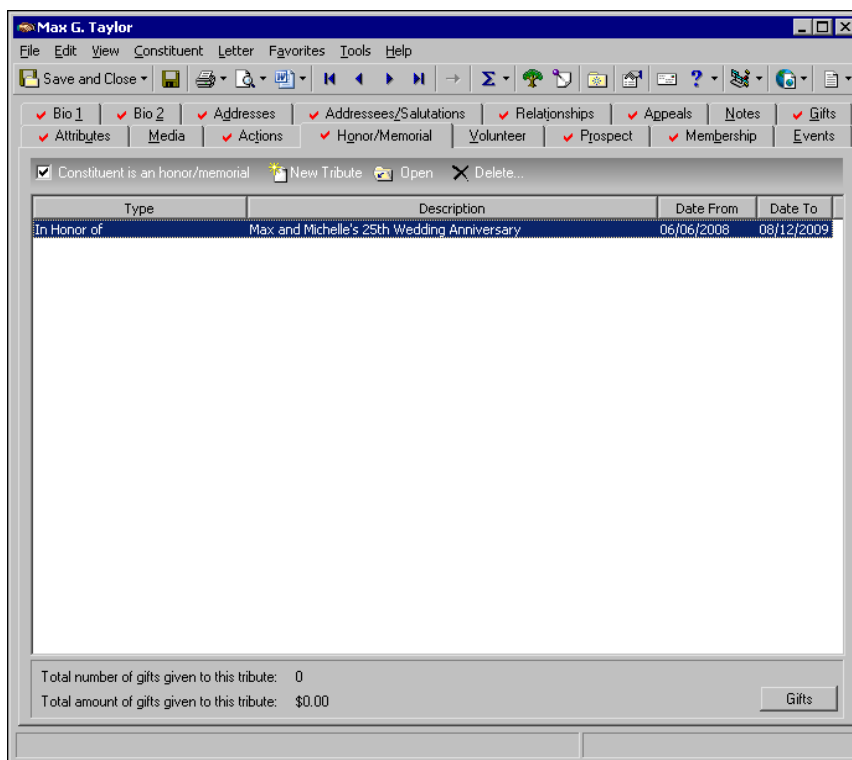
Once you add a tribute, you may find it necessary to change or update that information to ensure accuracy in your records.

▶ **Editing a tribute from the Honor/Memorial tab**

Occasionally, you may want to make changes to a tribute.

Scenario: Max and Michelle call asking that gifts given in honor of their anniversary be allocated to the Smith Library Fund as well as the 2009 Annual Fund. However, you still want the 2009 Annual Fund to remain as the default fund. You need to add this to the **Notes** box on the tribute record. If you have not set up a tribute for Max and Michelle’s 25th anniversary, see “Adding Tributes” on page 11.

1. From Max Taylor’s constituent record, select the Honor/Memorial tab. For more information on opening a constituent record, see “Navigating in Honor/Memorial Tracking” on page 2.
2. In the **Honor/Memorial** grid, highlight the tribute “In Honor Of Max and Michelle’s 25th Wedding Anniversary”.



3. On the action bar, click **Open**. The Tribute screen appears.

Name	Relationship	Reciprocal	Letter
Max G. Taylor	self	self	
Melanie Taylor	Daughter	Father	Tribute Thanks

4. In the **Notes** field, edit the note to read “Max and Michelle request contributions be sent to the 2005 Annual Fund or the Smith Library Fund in lieu of presents.”

Name	Relationship	Reciprocal	Letter
Melanie Taylor	Daughter	Father	Tribute Thanks
Max G. Taylor	self	self	

5. Click **Save and Close** on the toolbar. You return to the Honor/Memorial tab of Max Taylor’s record.

Adding Additional Acknowledgees for Tributes

You can add additional honor/memorial acknowledgees at any time. Honor/memorial acknowledgees are the family members, friends, associates, or honorees to be notified when a gift is given to the tribute.

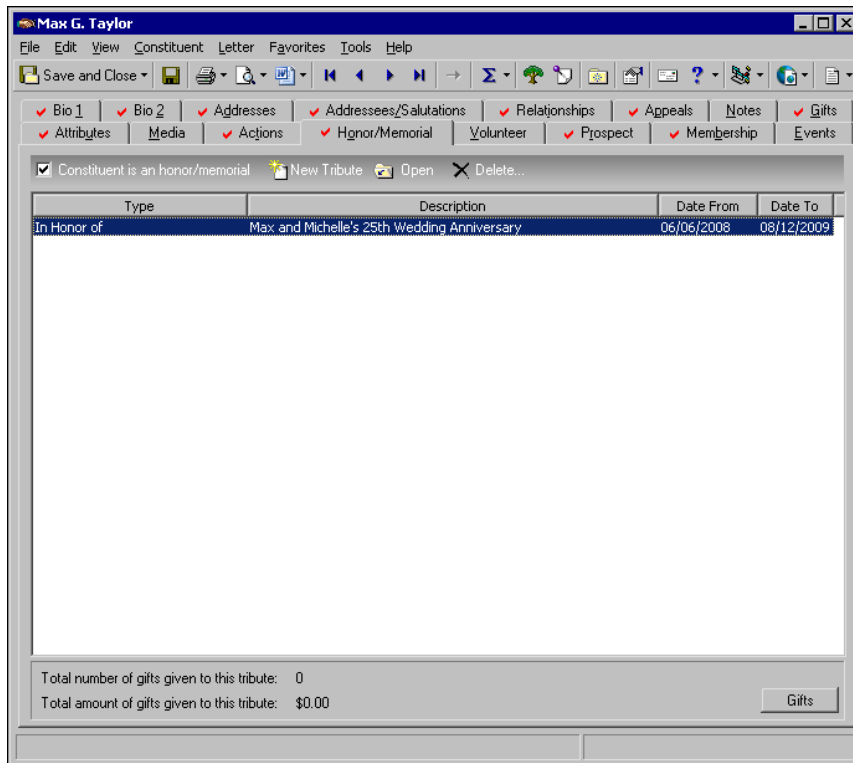
Note: When you mark the **Make the Spouse an acknowledge on the tribute for the deceased** business rule, the spouse is added as an acknowledgee on the tribute record even if the spouse is not a constituent. However, if the spouse is not a constituent, the spouse is only added as an acknowledgee if he or she has an address. For more information about business rules, see the *Configuration & Security Guide*.

An acknowledgee does not have to be a constituent in your database. However, the acknowledgee must be a relationship of the honoree and must have a relationship record with valid address information entered if you want to mail a notification.

▶ **Entering additional honor/memorial acknowledgees**

Scenario: You set up a tribute in honor of Max and Michelle Taylor’s 25th wedding anniversary. Their daughter, Bethany Taylor, calls and explains that she is hosting a surprise anniversary party for her parents. She would like to be notified when gifts are received for the tribute in honor of her parents so that she can make sure to invite everyone that has given a gift in honor of her parents’ anniversary.

1. From Max Taylor’s constituent record, select the Honor/Memorial tab. For more information on opening a constituent record, see “Navigating in Honor/Memorial Tracking” on page 2.
2. In the **Honor/Memorial** grid, highlight the tribute “In Honor Of Max and Michelle’s 25th Wedding Anniversary”.



Note: All constituents having the **Acknowledge this individual for hon/mem gifts** checkbox marked on the General 1 tab of their relationship record automatically default in the **Acknowledges** grid.

- On the action bar, click **Open**. The Tribute screen appears.

Tribute for Max G. Taylor

File Edit Tribute Help

Save and Close

Tribute type: In Honor of Date from: 06/06/2008

Description: Max and Michelle's 25th Wedding Anniversary Date to: 08/12/2009

Default Fund: 2009 Annual Fund

Notes: Max and Michelle request contributions be sent to the 2009 Annual fund or the Smith Library Fund in lieu of presents.

Acknowledges			
Name	Relationship	Reciprocal	Letter
Melanie Taylor	Daughter	Father	Tribute Thanks
Max G. Taylor	self	self	

Honor/Memorial is an acknowledgee Gifts may be given to this tribute [Gift Details](#)

- Click inside the **Name** column of the next empty row in the **Acknowledges** grid so you can search for Bethany Taylor.
- Click the binoculars. The Search relationships screen appears.

Search relationships for Mr. Max G. Taylor

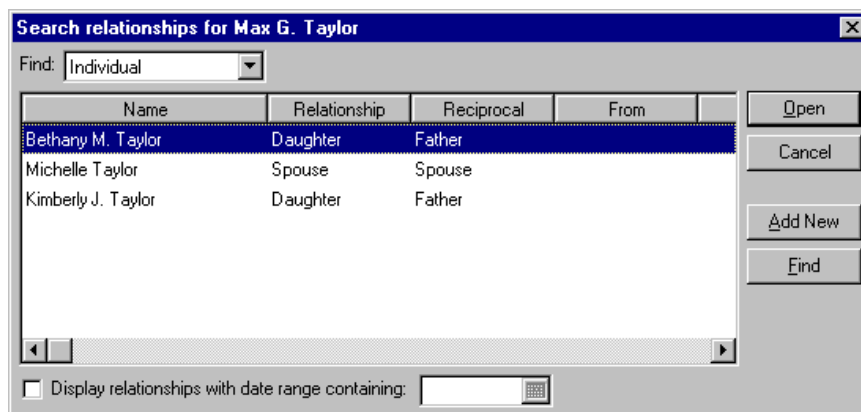
Find: Individual

Name	Relationship	Reciprocal	From	To
------	--------------	------------	------	----

[Open](#)
[Cancel](#)
[Add New](#)
[Find](#)

Display relationships with date range containing:

6. Click **Find**. A list of relationships for Max Taylor appears.



7. Select “Bethany M. Taylor” and click **Open**. Bethany’s name and relationship information appears in the **Acknowledgees** grid.

The **Acknowledge this individual for hon/mem gifts** checkbox is automatically marked on Bethany Taylor’s relationship record.

Note: When working with the Honor/Memorial Acknowledgement Letters mail task, if you choose **Selected Records**, and are using a constituent query, the query must include honor/memorial acknowledgee records, not donor records. The same concept applies when selecting **One record**, if it is a constituent record. However, when using a gift query, you must include the gift records of the donors. This concept also applies when you select **One record** and choose a gift record. For more information about honor/memorial acknowledgement letters, see the *Mail Guide*.

8. In the **Letter** column, select “Tribute Thanks”.
You are sending a Tribute Thanks letter to Bethany who requested to be notified as an acknowledgee.
9. Click **Save and Close** on the toolbar. You return to the Honor/Memorial tab of Max Taylor’s record.

Deleting Tributes

Occasionally, you may want to delete a tribute. For example, you can delete tributes if you have duplicate tribute records in your database, or if a tribute exists for the wrong constituent. We do not recommend deleting tributes often. Remember that once you delete a tribute record, that record is permanently removed from your database.

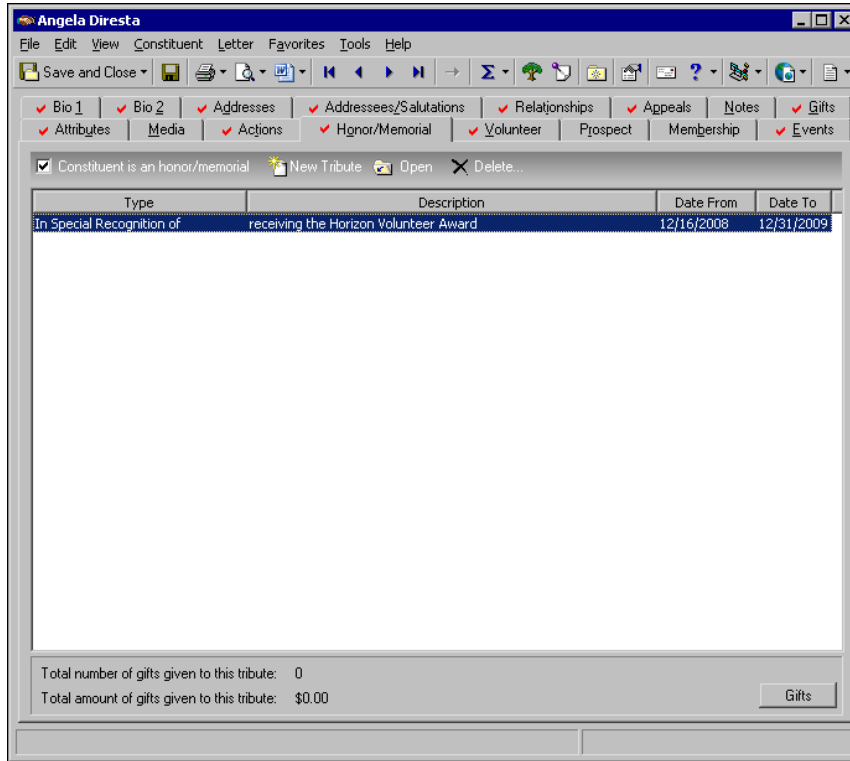
If gifts have been given to a tribute, you can still delete that tribute without deleting the gifts for the tribute. When you delete a tribute that contains gifts, you delete the tribute from the honor/memorial’s record and you delete the tribute from all gift records that have been given to the tribute.

▶ Deleting a tribute from the Honor/Memorial tab

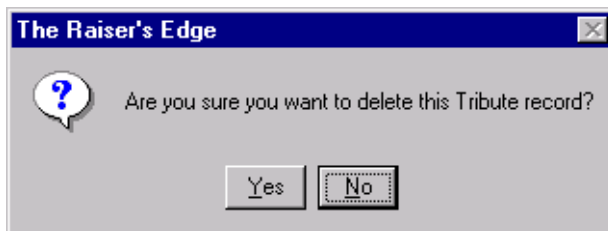
Scenario: You are cleaning up your database and notice a tribute was created for Angela Diresta. You know Angela personally and you realize she should not have a tribute on her record. You conclude someone must have added this information accidentally. To keep your database as clean and accurate as possible, delete the tribute record from the Honor/Memorial tab of Angela’s constituent record.

Warning: Before you delete a tribute record, or any other record in *The Raiser’s Edge*, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

1. From Angela Diresta's constituent record, select the Honor/Memorial tab. For more information on opening a constituent record, see "Navigating in Honor/Memorial Tracking" on page 2.
2. In the **Honor/Memorial** grid, highlight the tribute "In Special Recognition Of receiving the Horizon Volunteer Award".



3. On the action bar, click **Delete**.
4. A message appears confirming your wish to delete the tribute from your database.



Tributes can also be deleted even if gifts have been given to a tribute. When you delete a tribute that is linked to a gift, a message appears confirming your wish to delete the tribute. When you delete a tribute linked to gifts, the tribute no longer appears on the gift record. For more information about tribute gifts, see the *Tribute Gifts Guide*.

5. Click **Yes**. The tribute is permanently deleted from your database and you return to Angela Diresta's Honor/Memorial tab.

Index



A

accessing, *see* navigating
acknowledgee
 adding additional acknowledgees 18
 defined 2
adding a tribute 11
adding additional acknowledgees 18

C

changing, *see* editing
creating, *see* adding

D

deleting a tribute 21

E

editing a tribute 17

G

gift details button 14
gifts, viewing tribute 14

H

honor/memorial tab 7
Honor/Memorial Tracking, defined 1, 7
honor/memorial, defined 2
honoree, defined 2

M

modifying, *see* editing

N

navigating
 opening 3

toolbar 6

O

opening tribute information 3

P

preferences, *see* user options

T

toolbar 6
tribute record 10

U

user options 7

V

viewing tribute gifts 14

