Cheers to 40 Years: Fundamental, Fabulous and Formidable Raiser’s Edge Tips

HELPING YOU EXCEL AS A DATABASE MANAGER

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HELLO!
I’m Tracy VanSolkema

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• Grand Rapids Community Foundation – 7 years
• I love Country Music
• I’m celebrating a milestone birthday this week and I decided to spend it with you!
My Organization

Established 1922
30 Employees and growing
Asset Size: $360 Million
Databases: Raiser’s Edge (48K constituent records), Financial Edge, BBNC, Grants Edge, SmartSimple, Bromelkamp.
You do it like that?

It’s much more difficult to use a computer than it should be. But that’s mostly because they’re powerful, and power brings choices, and may you need some help with your choices.

-SETH GODIN
RE Database Management

**FUNDAMENTAL** – You might already know this, but some things are just too important to overlook.

**FABULOUS** – Impressive and under-utilized tools to help you go above and beyond as a user.

**FORMIDABLE** – Lead the way – prepare and think outside of the database when managing your data.
You might already know this, but some things are just too important to overlook
STOP!

Query is not a reporting tool!

• The most misunderstood RE tool
• Query is a grouping tool
• A starting point to use in collaboration with other Raiser’s Edge tools
When sharing queries or query lists you can rename the header row name in the output.

- Right click on the header in the output criteria and choose Column Heading.
QUERY Essentials

SUMMARY FIELDS:
To group constituents with specific gift history.

Don’t forget to define the Gift Types you want to include or it will choose the default set of Gift Types.

Don’t forget to use query options to manage soft credits
Go to Tools > Query Options > Gift Processing

Gift Types are defaulted unless you specify otherwise in your query

Cash
Pledge
MG Pledge
Stock/Property, Stock/Property(sold)
Gift-in-Kind
Recurring Gift Pay-Cash
Other
Write Off and MG Write offs amounts are subtracted from total
• Select "One of" as the operator.
• In the Values grid, **scroll to the bottom**
• Click in the last row.
• Press Ctrl+V to paste the IDs. (You may see the list of IDs appear in the grid or it may appear that nothing happened.)
• Scroll to the top of the value grid. The values should be present now.
• Click OK.
• The list of IDs now appears in the filters frame on the criteria tab.

(Note: a maximum of 500 values can be pasted at one time)

**QUERY**

Copy and paste multiple values at the same time into a query when using the One of operator

Article Number: 41666
• I love data – Export allows me to get any information I need on a constituent in one excel file.

• Other RE tools don’t allow you as many output options as Export.
One-to-Many Fields – When a field can have a number of associated values.

Examples of One-to-Many Fields:

- Constituent Code
- Attributes with a drop down table
- Phone/Emails
- Summary fields

- **In query** – generally when you output a one to many field you will get duplicate rows for a constituent with multiple values.

- **Export** allows you to control the output so you can see the specific value of a field on a separate column when exporting data.
EXPORT

One-to-Many Fields – When a field can have a number of associated values.
A flexible and powerful output tool — that has important and powerful filters

- Donor Acknowledgement Letters
  - Conditional merges

- Quick Letters/Basic List/Envelopes or Labels
  - Powerful filtering
  - Address Management

- Create a static Output Query
  - Powerful filtering that can’t be done via query
  - Second step in the many processes
Donor Acknowledgement Letters

- Updates the gift showing that it was acknowledged
- Can use advanced address management to ensure the letter gets to the correct person and or address
- Create a conditional mail merge so that different letters can be generated quickly and easily
Choose your conditional field

Select the field you want to use for the condition. You may select only one field. The selected field will be used for all conditions.

Options:
- Description
- Condition
- Compare to

Fields:
- Description
- Condition
- Compare to

Options for each field:
- Arts and Social...
- Academic Achiev...
- Economic Prosper...
- GRFC Donor...
- Healthy Ecosystem...
- Healthy People...
- Vibrant Neighborhoods
- Donor Advised...
Powerful Filtering

• Tab 3 and Tab 5 - To exclude criteria (rather than trying to do this in query)
MAIL

Advanced Address Management

- Seasonal Address
- Address Preference
- Address Attributes
- Address Maintenance
MAIL

- Advanced Address Management
- Contact Management
- Duplicate Management
- Contact Attributes
FABULOUS

Impressive and under-utilized tools to help you go above and beyond as a user.
BUSINESS RULES

Create user-defined business rules to create reminders for special situations.

If the record satisfies the query's criteria, a pre-defined message appears to notify the user.

When is this useful?

• Special Reminders you don’t want specific people to miss
• Donors with special situations
• Reminders for database health and maintenance

(Business rules are set up under Configuration and can be based on Constituent, Gift, or Action Records)
DEFAULT SETS

Default sets are designed to automatically load data into fields on records.

When is this useful?

- When you have a lot of data-entry that is the same for many constituents
- To help your data entry staff be successful – especially for infrequent users

Why use defaults?

- Consistency
- Efficiency – save time

(Article Number: 46148)

Tools > Create/Edit Default Sets

(Press Shift+F2 to load the last default set that was used)
FORMIDABLE

Lead the way – prepare and think outside of the database when managing your data.
One key component to fundraising success is to know that information is power and that power resides in your database

-Unknown
DATA LEADERSHIP

- Buy in from Leadership
- Embrace Change
- Invest in Data
- Invest in People
Data Health

Policies and Procedures

• Data Entry standards
• Use and Define Required Fields
• Use and Define Code tables
• Define fields/attributes/etc.
• Procedures unique to your organization

Keep key users in the know

• Data Committee
  • Training
  • Code update
  • Change in procedure
  • Best practices and tips
What’s new on the Horizon for Database Managers

Your role may be changing

- Strategy Partner
  - You are your organization’s Data Ambassador
- Data Privacy and Security
- Inclusive Data
THANK YOU!

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LET'S CONNECT

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