

# TheRaiser'sEdge<sup>®</sup> Enterprise<sup>™</sup>

## Tribute Data Entry Guide

**031208**

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# Tribute Data Entry Guide

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## What Is In This Guide?

In the *Tribute Data Entry Guide*, you learn how to manage your honour/memorial records. Using the Honour/Memorial tab, you can track detailed information about donations given in honour, celebration, or memory of an individual or organisation. You can also learn about the following:

- “Adding a tribute from the Honour/Memorial tab” on page 12
- “Viewing gifts given to a tribute” on page 15
- “Editing a tribute from the Honour/Memorial tab” on page 17
- “Entering additional honour/memorial acknowledgees” on page 19
- “Deleting a tribute from the Honour/Memorial tab” on page 22



## 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.co.uk](http://www.blackbaud.co.uk). 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.

W e l c o m e

## Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.



The notepad symbol designates a note or tip related to the information in the main text column.



The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.



The clock symbol designates a shortcut or timesaving action.



The dictionary symbol designates the definition of a frequently used term.

# Honour/Memorial Tracking

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## Procedures

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# Chapter 1

 *Honour/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*.

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

If you use *Honour/Memorial Tracking*, the Honour/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 honour/memorial records. For example, you can have a tribute honouring Betty Smith for her volunteer work in the community. At the same time, you can have a tribute honouring the birth of her new son. To create tributes for a constituent, the constituent must first be checked as an honour/memorial. In addition, a variety of tribute reports and summaries are available to help track donations made in honour, celebration, or memory of constituents.

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

## Frequently Used Terms

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 honouree that should be notified when a gift is donated to honour, remember, or celebrate an honour/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 honouree.

**Honour/memorial (honouree).** An honour/memorial is an individual or organisation being honoured, remembered, or celebrated by gifts donated to your organisation. 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 honour/memorial on her constituent record.

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

**Tribute.** A tribute explains the reason why you are honouring, remembering, or celebrating a constituent. For example, Jane McBeth is participating in a walk-a-thon to support your organisation. Many of her friends are donating gifts to you 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 Honour/Memorial Tracking

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

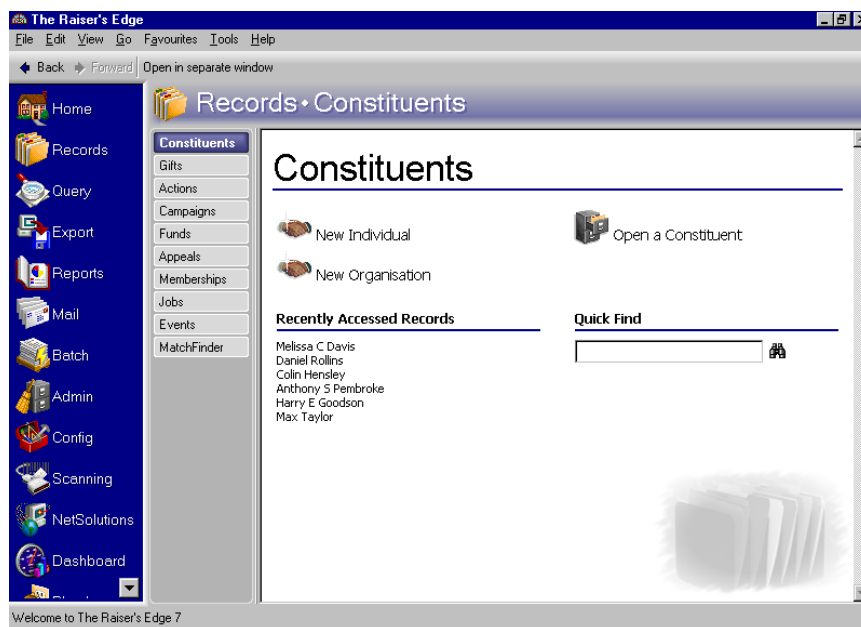
## Accessing the Honour/Memorial Tab


Before you begin tracking information about your tributes in *The Raiser's Edge*, you must first access the Honour/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 Honour/Memorial tab of a constituent record

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

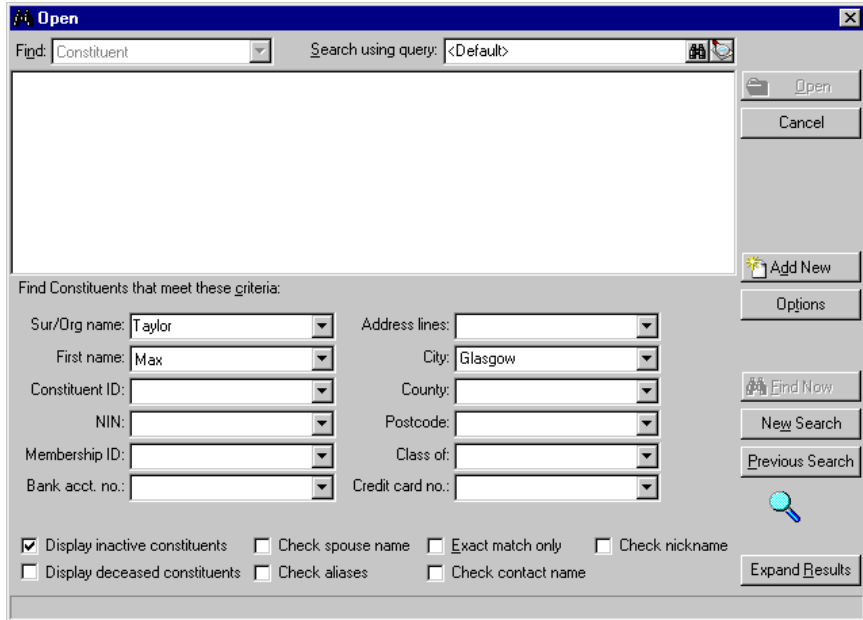
1. On the Raiser's Edge bar, click **Records**.
2. Click **Constituents**. The Constituents page appears.



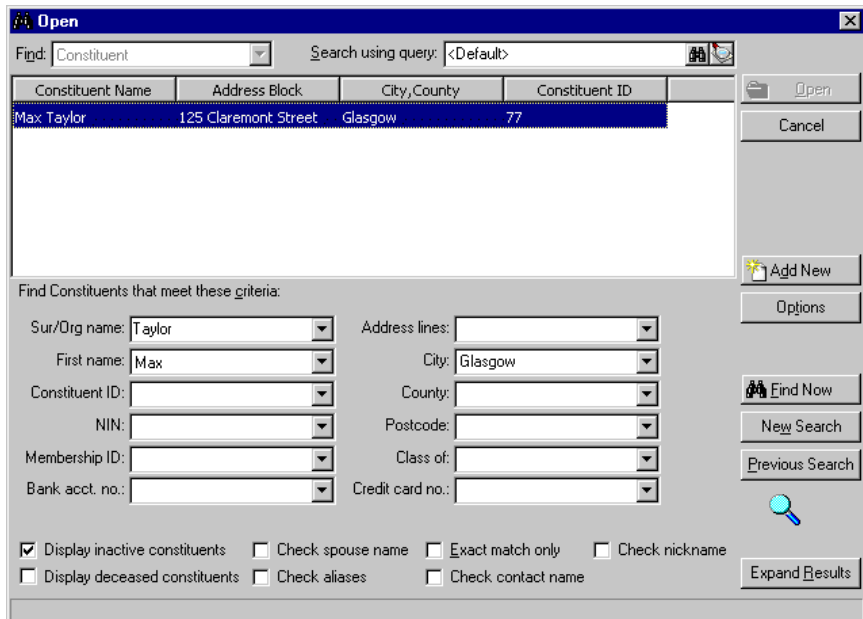
 We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding the constituent.

 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 about how to use these fields, see the *Program Basics Guide*.

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




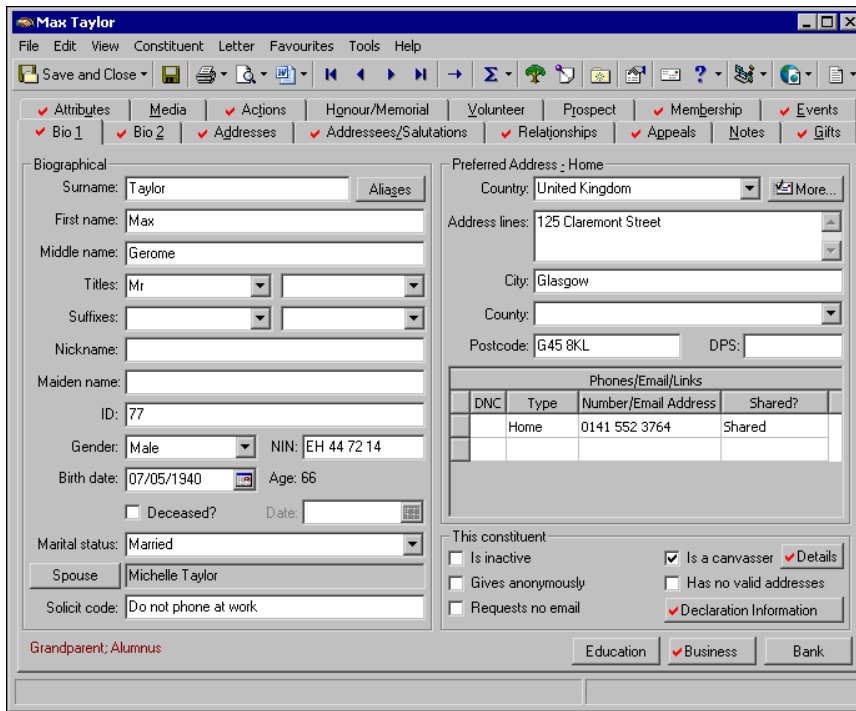
4. In the **Find Constituents that meet these criteria** frame, decide what criteria you want to use when searching for your constituent and enter the information in the appropriate criteria fields. The criteria you can use include the constituent's surname or first name, ID, National Insurance Number, membership identification number, bank account number, address lines, city, county, postcode, class of, 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.



Constituent Name	Address Block	City, County	Constituent ID
Max Taylor	125 Claremont Street	Glasgow	77

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

 You can maximise and resize your constituent records.



**Max Taylor**

File Edit View Constituent Letter Favourites Tools Help

Save and Close

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

**Biographical**

Surname: Taylor Aliases  
 First name: Max  
 Middle name: Gerome  
 Titles: Mr  
 Suffixes:  
 Nickname:  
 Maiden name:  
 ID: 77  
 Gender: Male NIN: EH 44 72 14  
 Birth date: 07/05/1940 Age: 66  
 Deceased? Date:  
 Marital status: Married  
 Spouse: Michelle Taylor  
 Solicit code: Do not phone at work

**Preferred Address : Home**

Country: United Kingdom More...  
 Address lines: 125 Claremont Street  
 City: Glasgow  
 County:  
 Postcode: G45 8KL DPS:

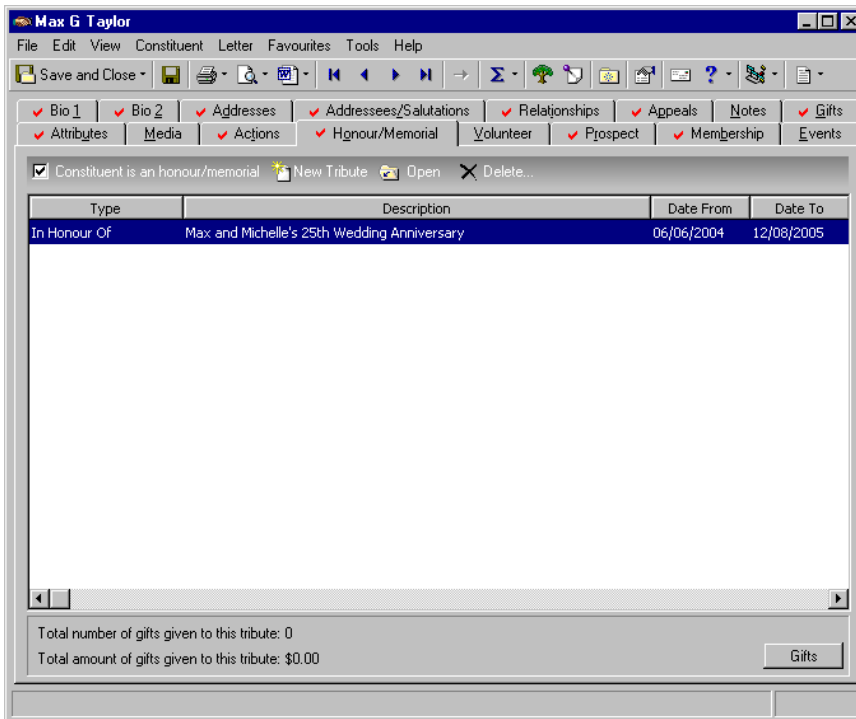
Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	0141 552 3764	Shared

This constituent  
 Is inactive  Is a canvasser Details  
 Gives anonymously  Has no valid addresses  
 Requests no email Declaration Information

Grandparent; Alumnus

Education Business Bank

8. Select the Honour/Memorial tab.



**Max G Taylor**

File Edit View Constituent Letter Favourites Tools Help

Save and Close

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

Constituent is an honour/memorial New Tribute Open Delete...

Type	Description	Date From	Date To
In Honour Of	Max and Michelle's 25th Wedding Anniversary	06/06/2004	12/08/2005

Total number of gifts given to this tribute: 0  
 Total amount of gifts given to this tribute: \$0.00

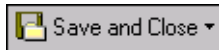
Gifts

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 *Honour/Memorial Tracking*, you should be familiar with two toolbars. The first is the constituent record toolbar. The Honour/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 Honour/Memorial Tab

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 Honour/Memorial tab on a constituent record. For example, you can specify the Honour/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 Honour/Memorial tab. You can also specify that a tick appear on the Honour/Memorial tab if any information is entered on the Honour/Memorial tab. For more information about User Options, see the User Options chapter of the *Program Basics Guide*.

 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*.

## Overview of Tribute Information

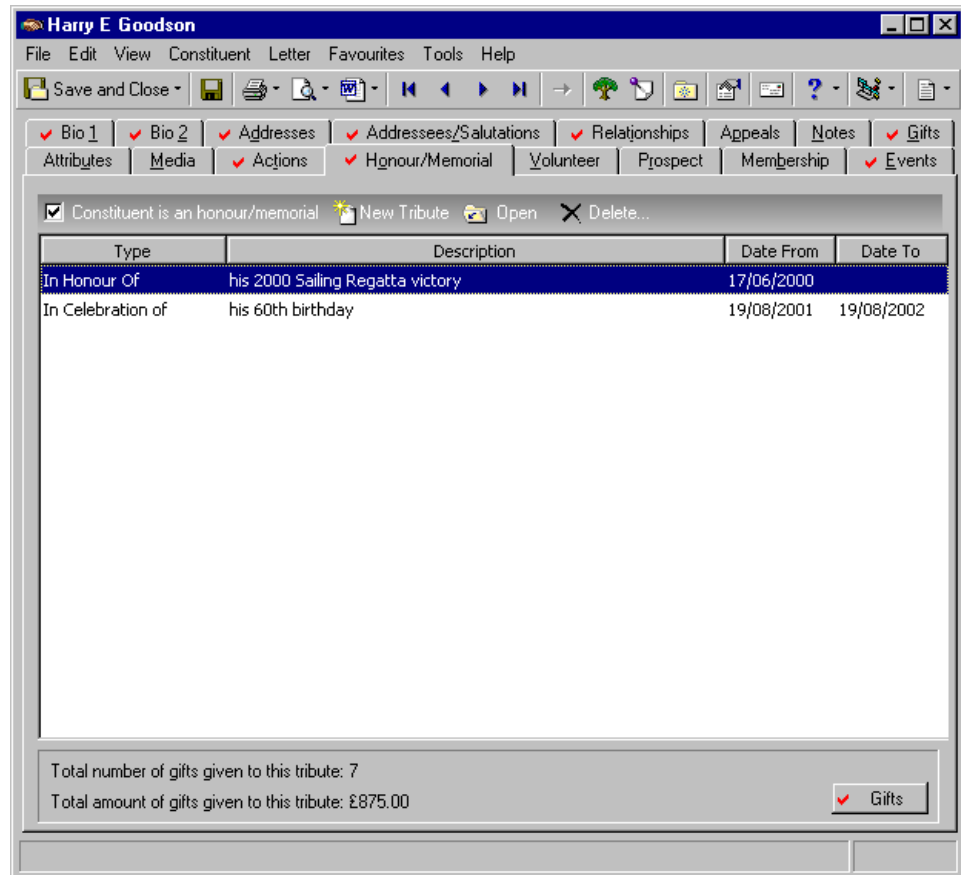
The functions for *Honour/Memorial Tracking* are divided into two sections. From the Honour/Memorial tab of a constituent record, you can add, edit, and delete tributes. From the **Gifts** link of a constituent record, you can add, edit, and delete gifts and gift amounts for your tributes.

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

## Honour/Memorial Tab

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

Before you can work with new tribute information for a constituent or an organisation, you must first check the **Constituent is an honour/memorial** checkbox. This designates an individual or organisation as an honour/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 a tribute gift history, see “Viewing Tribute Gifts” on page 15.

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

The screenshot shows a software window titled "Summary for Harry E Goodson". It features a menu bar (File, Edit, View, Summary, Help) and a toolbar with icons for Close, Print, Refresh, and Help. The "Tribute" field is set to "In Honour Of - his 2000 Sailing Regatta victory". There are checkboxes for "Exclude largest gift" and "Exclude smallest gift". Below this is a table of gift records:

	Date	Amount	Type	Fund
First	6/17/2000	\$150.00	Cash	Smith-Brown Scholarship Fund
Latest	9/26/2001	\$200.00	MG Pay-Cash	2001 Annual Fund

Summary statistics: Average: \$125.00, Median: \$150.00, Total gifts: 9, Total years: 2, Mode: Multiple Modes, Consecutive years: 0.

**Giving Summary**  
 Net: \$875.00      Tax: \$56.41      Unclaimed: \$56.41      Gross: \$931.41

**Breakdown:** Financial year (dropdown)      Customise (button)

Financial Year	Received	Pledged	Paid	Written Off	Balance	Total Committed	No. Gifts
<all>	\$625.00	\$250.00	\$250.00	\$0.00	\$0.00	\$875.00	9
After 12/2004	\$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
01/2003 - 12/2003	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0

From the Honour/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 Honour/Memorial gift summary and graphing, see the *Summaries Guide*. You can also create a more detailed Honour/Memorial summary in *Reports*. For more information, see the *Reports Guide*.

## Tribute Record Screen

You can access a tribute record from the Honour/Memorial tab of a constituent record. A tribute details the reason why you are honouring, remembering, 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 honouring Betty Smith. 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 checked on the relationship record. For more information about relationships, see the Relationships chapter of the *Constituent Data Entry Guide*.

Relationships of the honour/memorial having the **Acknowledge this individual for hon/mem gifts** checkbox checked on their record automatically default into the **Acknowledgees** grid for the honour/memorial. However, a constituent must be checked as an honour/memorial before the **Acknowledge this individual for hon/mem gifts** checkbox can appear on the relationship record. Once you check a constituent as an honour/memorial, you must save the record. Before you create the tribute, you must check the **Acknowledge this individual for hon/mem gifts**



checkbox on any relationship records for the honour/memorial that you want to automatically default into the **Acknowledgees** grid and save the record. After you save the record and open a new tribute for the honour/memorial, the acknowledgees will default into the **Acknowledgees** 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 honour/memorial acknowledgement letters in *Mail*. For more information about honour/memorial acknowledgement letters, see the *Mail Guide*.


## Managing Tributes

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

### Adding Tributes

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

 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.

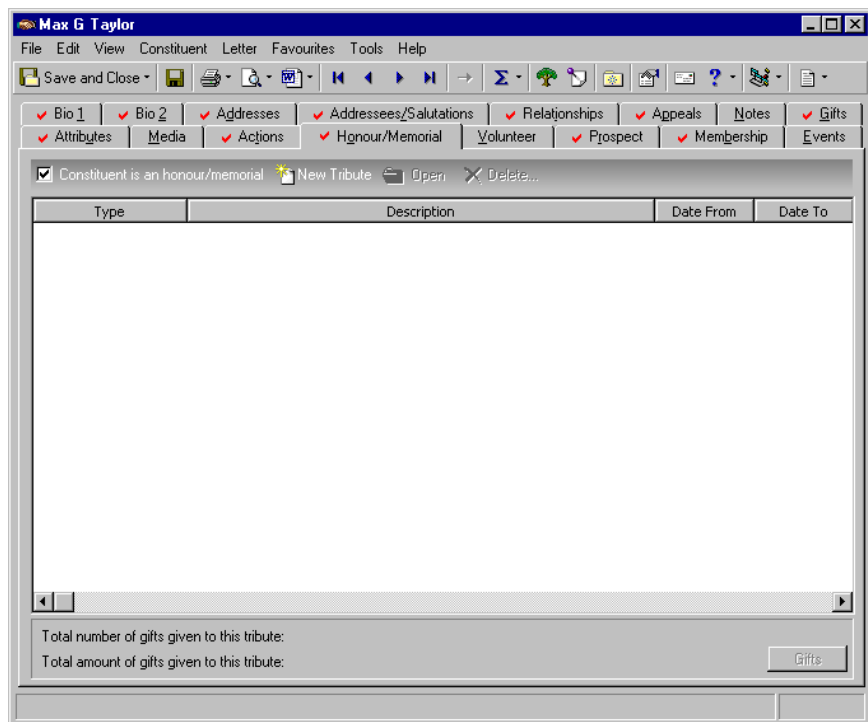
 If you make changes to a record and notice your changes are not updated automatically, click **Save** on the toolbar before adding any additional information.

### ➤ Adding a tribute from the Honour/Memorial tab



Mrs Elizabeth Ashton is donating a sum of money to your organisation in honour 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 honour 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.

1. From Max Taylor's constituent record, select the Honour/Memorial tab. For more information about how to open a constituent record, see "Navigating in Honour/Memorial Tracking" on page 3.



2. Check the **Constituent is an honour/memorial** checkbox so the database recognises Max as the honour/memorial.

- On the action bar above the Honour/Memorial grid, click **New Tribute**. The New Tribute screen appears.

**New Tribute for Mr Max Taylor**

File Edit Tribute Help

Save and Close

Tribute type: In Honour Of Date from: 06/06/2004

Description: Max and Michelle's 25th Wedding Anniversary Date to: 12/08/2005

Default Fund: 2005 Annual Fund

Notes: Max and Michelle request contributions be sent to the 2005 Annual Fund in lieu of presents.

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

Honour/Memorial is an acknowledgee  Gifts may be given to this tribute Gift Details

Press F7 to zoom

- In the **Tribute type** field, enter “In Honour Of”.
- In the **Description** field, enter “Max and Michelle’s 25th Wedding Anniversary”.
- In the **Date from** field, enter 06/06/2004 because you want to accept gifts a few months before the anniversary.
- In the **Date to** field, enter 12/08/2005 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 about Tribute gifts, see the *Tribute Gifts Guide*.


- In the **Default Fund** field, select “2005 Annual Fund”. Max and Michelle want gifts given in their honour to the 2005 Annual Fund.
- In the **Notes** box, enter “Max and Michelle request contributions be sent to the 2005 Annual Fund in lieu of presents.”
- Check the **Gifts may be given to this tribute** checkbox. If this checkbox is unchecked, no gifts can be associated with the tribute.
- To ensure Max is listed in the **Acknowledges** grid and is notified every time a gift is donated to the tribute, check the **Honour/Memorial is an acknowledgee** checkbox. Max Taylor’s name now appears in the grid.
- Tab through the remaining columns to access a new row.
- Click inside the **Name** column of the next empty row in the **Acknowledges** grid to access the binoculars so you can search for Melanie Taylor.


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

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 Honour Of” automatically defaults.

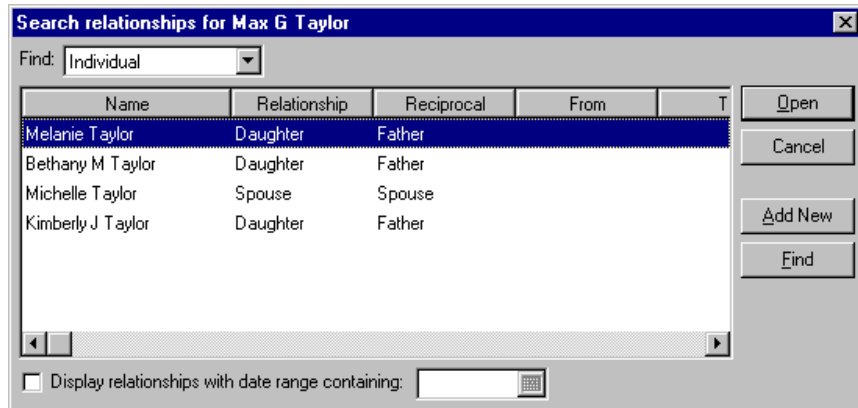
All relationships having the **Acknowledge this individual for hon/mem gifts** checkbox checked on the General 1 tab of their relationship record automatically default into the **Acknowledges** grid.

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

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

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

- Click the binoculars. The Search relationships screen appears.



Name	Relationship	Reciprocal	From	T
Melanie Taylor	Daughter	Father		
Bethany M Taylor	Daughter	Father		
Michelle Taylor	Spouse	Spouse		
Kimberly J Taylor	Daughter	Father		

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

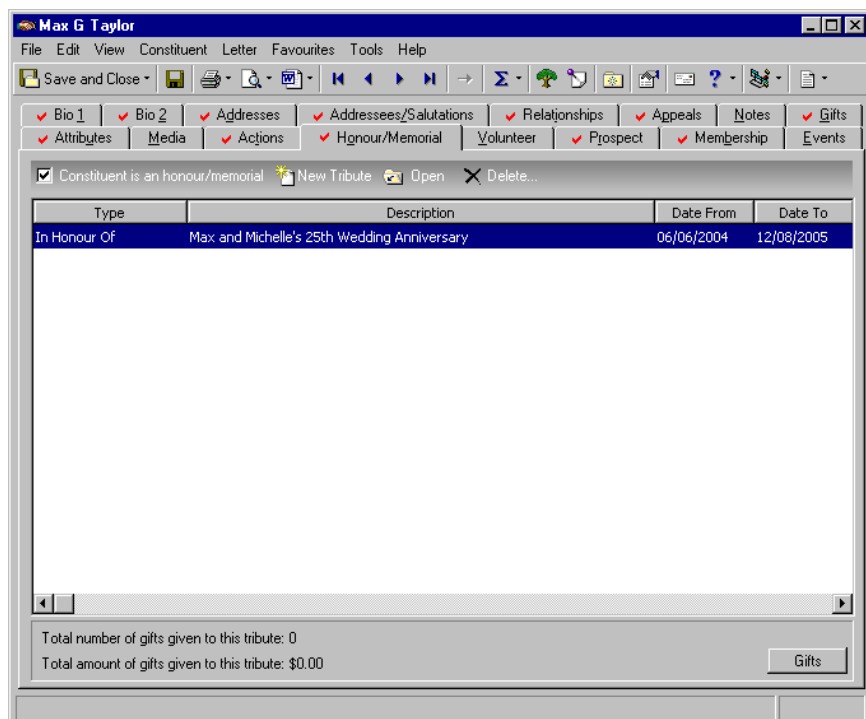
When you add Melanie Taylor to the **Acknowledgees** grid, the **Acknowledge this individual for hon/mem gifts** checkbox is checked on Melanie’s relationship record.

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

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

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

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



Type	Description	Date From	Date To
In Honour Of	Max and Michelle's 25th Wedding Anniversary	06/06/2004	12/08/2005

Total number of gifts given to this tribute: 0  
Total amount of gifts given to this tribute: \$0.00

## Viewing Tribute Gifts

The total number and total amount of gifts given to the tribute display at the bottom of the Honour/Memorial tab. You can use the **Gifts** button to view gifts given in honour or memory of a particular tribute. To view gift information, click the **Gifts** button from the grid in the Honour/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 Honour/Memorial tab, you must highlight a tribute in the grid on the Honour/Memorial tab. Otherwise, the **Gifts** button remains disabled.

### ➤ Viewing gifts given to a tribute



You receive gifts in honour of Mr Harry Goodson. You want to know how many gifts have been given and how much money has been donated to Harry'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 Harry Goodson's constituent record, select the Honour/Memorial tab. For more information about opening a constituent record, see "Navigating in Honour/Memorial Tracking" on page 3.
2. In the **Honour/Memorial** grid, highlight the tribute "In Honour Of his 2000 Sailing Regatta Victory".

The screenshot shows the constituent record for Harry E Goodson. The Honour/Memorial tab is active, displaying a table of tributes. The table has columns for Type, Description, Date From, and Date To. Two tributes are listed: "In Honour Of his 2000 Sailing Regatta victory" (Date From: 17/06/2000) and "In Celebration of his 60th birthday" (Date From: 19/08/2001, Date To: 19/08/2002). At the bottom of the window, a summary shows: "Total number of gifts given to this tribute: 7" and "Total amount of gifts given to this tribute: £875.00". A "Gifts" button is visible in the bottom right corner of the summary area.

Type	Description	Date From	Date To
In Honour Of	his 2000 Sailing Regatta victory	17/06/2000	
In Celebration of	his 60th birthday	19/08/2001	19/08/2002

Total number of gifts given to this tribute: 7  
Total amount of gifts given to this tribute: £875.00

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

- 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
26/09/2001	£50.00	MG Pledge	Annual Campaign	2001 Annual Fund
26/09/2001	£200.00	MG Pledge	Annual Campaign	2001 Annual Fund
14/09/2001	£150.00	Cash	Annual Campaign	2001 Annual Fund
14/09/2001	£75.00	Cash	Annual Campaign	2001 Annual Fund
13/09/2001	£50.00	Cash	Annual Campaign	2001 Annual Fund
10/09/2001	£200.00	Cash	Annual Campaign	2001 Annual Fund
17/06/2000	£150.00	Cash	Scholarship Campaign	Smith-Brown Scholarship 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*.

- When you finish viewing the gifts for this tribute, click **Close** on the action bar. You return to the Honour/Memorial tab of Harry'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.

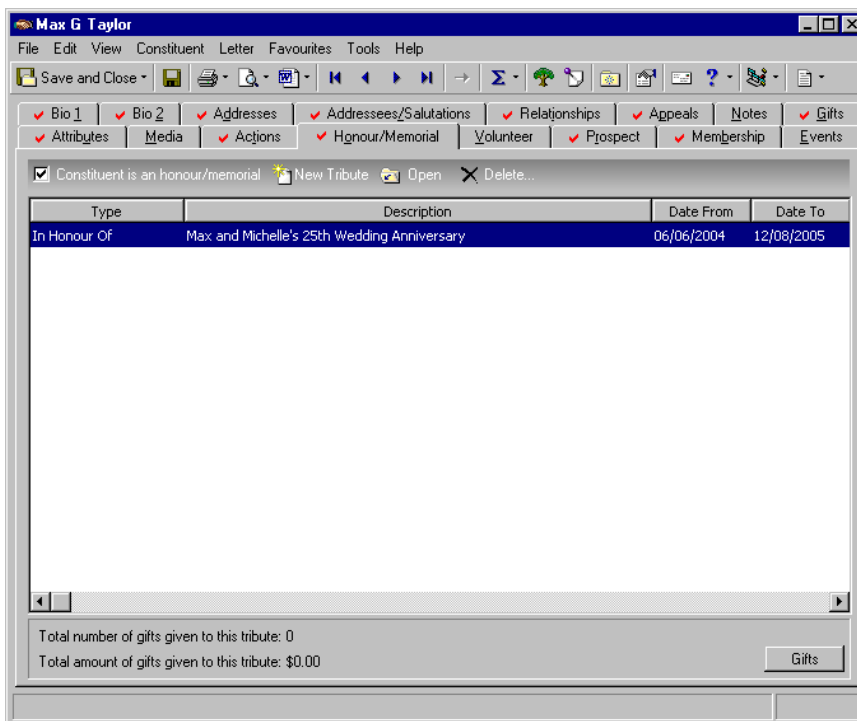
### ➤ Editing a tribute from the Honour/Memorial tab

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



Max and Michelle telephone asking that gifts given in honour of their anniversary be allocated to the Smith Library Fund as well as the 2005 Annual 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 Honour/Memorial tab. For more information about opening a constituent record, see "Navigating in Honour/Memorial Tracking" on page 3.
2. In the **Honour/Memorial** grid, highlight the tribute "In Honour Of Max and Michelle's 25th Wedding Anniversary".



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

**New Tribute for Mr Max Taylor**

File Edit Tribute Help

Save and Close

Tribute type: In Honour Of Date from: 06/06/2004

Description: Max and Michelle's 25th Wedding Anniversary Date to: 12/08/2005

Default Fund: 2005 Annual Fund

Notes: Max and Michelle request contributions be sent to the 2005 Annual Fund in lieu of presents.

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

Honour/Memorial is an acknowledgee  Gifts may be given to this tribute Gift Details

Press F7 to zoom

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.”

**New Tribute for Mr Max Taylor**

File Edit Tribute Help

Save and Close

Tribute type: In Honour Of Date from: 06/06/2004

Description: Max and Michelle's 25th Wedding Anniversary Date to: 12/08/2005

Default Fund: 2005 Annual Fund

Notes: Max and Michelle request contributions be sent to the 2005 Annual Fund or the Smith Library Fund in lieu of presents.

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

Honour/Memorial is an acknowledgee  Gifts may be given to this tribute Gift Details

Press F7 to zoom

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



## Adding Additional Acknowledgees for Tributes

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

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

### ➤ Entering additional honour/memorial acknowledgees



You set up a tribute in honour of Max and Michelle Taylor's 25th wedding anniversary. Their daughter, Bethany Taylor, telephones 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 honour of her parents so that she can make sure to invite everyone that has given a gift in honour of her parents' anniversary.

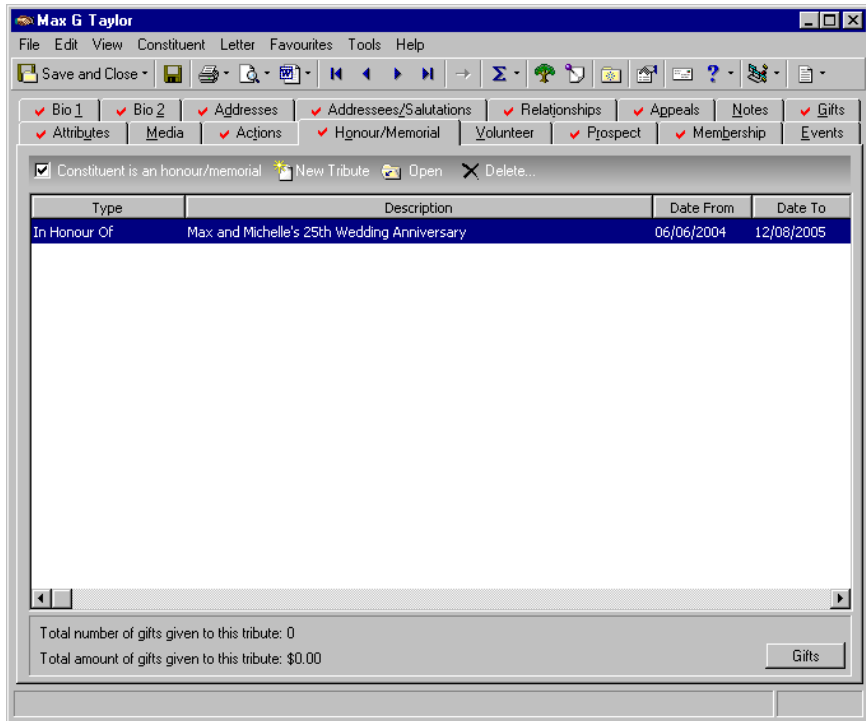
You need to add Bethany as an acknowledgee for Max Taylor's tribute. If you have not added a tribute in honour of Max and Michelle, see "Adding a tribute from the Honour/Memorial tab" on page 12.

1. From Max Taylor's constituent record, select the Honour/Memorial tab. For more information about opening a constituent record, see "Navigating in Honour/Memorial Tracking" on page 3.

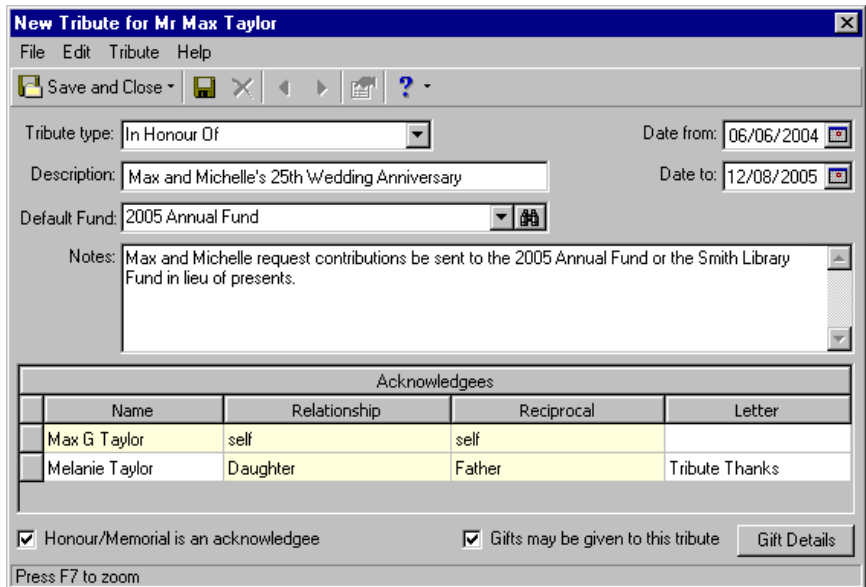


When you check the **Make the Spouse an acknowledgee on the tribute for the deceased** business rule, the spouse is added as an acknowledgee on the tribute record even if the spouse is not a constituent. However, if the spouse is not a constituent, the spouse is only added as an acknowledgee if he or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

- In the **Honour/Memorial** grid, highlight the tribute “In Honour Of Max and Michelle’s 25th Wedding Anniversary”.



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



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


Name	Relationship	Reciprocal	From	To
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- Click **Find**. A list of relationships for Max Taylor appears.


Name	Relationship	Reciprocal	From	To
Bethany M Taylor	Daughter	Father		
Michelle Taylor	Spouse	Spouse		
Kimberly J Taylor	Daughter	Father		

- 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 checked on Bethany Taylor’s relationship record.

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

 When working with the Honour/Memorial Acknowledgement Letters mail task, if you choose **Selected Records**, and are using a constituent query, the query must include honour/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 honour/memorial acknowledgement letters, see the *Mail Guide*

 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.

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 Honour/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 honour/memorial’s record and you delete the tribute from all gift records that have been given to the tribute.

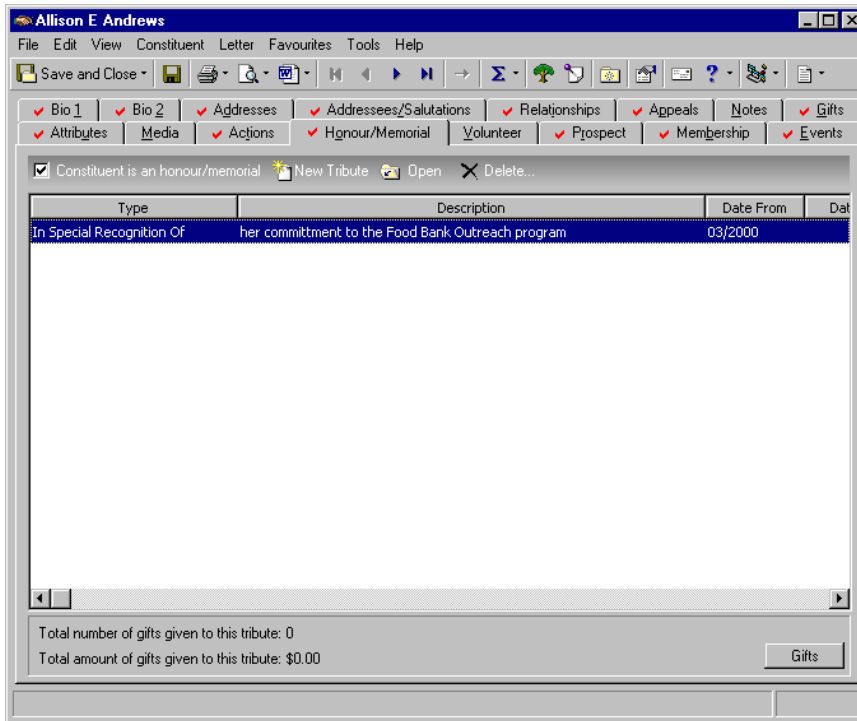
### ➤ Deleting a tribute from the Honour/Memorial tab



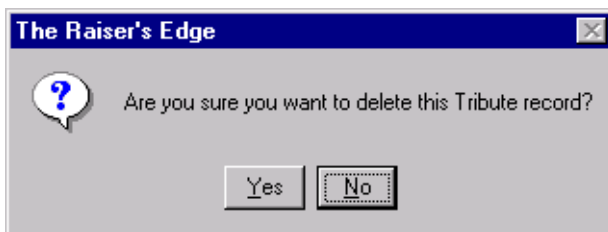
You are cleaning up your database and notice a tribute was created for Allison Andrews. You know Allison personally and you realise she should not have a tribute on her record. You conclude someone must have added this information accidentally. To keep your database as clean and accurate as possible,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

1. From Allison Andrew’s constituent record, select the Honour/Memorial tab. For more information about opening a constituent record, see “Navigating in Honour/Memorial Tracking” on page 3.

- In the **Honour/Memorial** grid, highlight the tribute “In Special Recognition Of her committment to the Food Bank Outreach program”.



- On the action bar, click **Delete**.
- 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*.

- Click **Yes**. The tribute is permanently deleted from your database and you return to Allison Andrew’s Honour/Memorial tab.



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