



Cause and Solution, Inc.[™]
Your Cause > Our Solution



**ROUNDTABLE: Tips and Tricks for
Database Management**
Shannon Ornelas, bCRE-Pro
Brian Bonin, bCRE-Pro, bCFE-Pro

bbcon

The Tech Conference for a Better World

OCTOBER 13-15, 2021

SPEAKERS



Shannon Ornelas, bCRE-Pro
Operations Manager
Cause and Solution, Inc.

Shannon has nine years of data entry and analysis experience with Blackbaud Raiser's Edge NXT and currently holds a bCRE-Pro.

In her current role as Operations Manager, she runs a complex and dedicated team who manages almost every aspect of the daily operations of non-profits of all sizes to find solutions to help improve fundraising.



Brian Bonin, bCRE-Pro, bCFE-Pro
Senior Solutions Engineer
Cause and Solution, Inc.

Brian's experience in operational support for a large non-profit national healthcare system has provided him with an exceptional understanding of complex donor database systems, fundraising support and the unique needs of independent and integrated development programs. Brian has preformed over 150 database conversions into various Blackbaud products including BB CRM, Raiser Edge and Financial Edge. Brian holds a bCRE-Pro and a bCFE-Pro.

In his current role as Senior Solution Engineer, Brian assists clients with producing unique solutions to their daily challenges.



TIP #1 – FIXING PHONE TYPES

Misaligned Phone Types

This is common issue that can occur over time or after a data conversion.

*Fix requires access to the Config->Tables in database view

Why is this an Issue

Your allowed only one Primary per Phone/Email/Fax/Link/Other type.

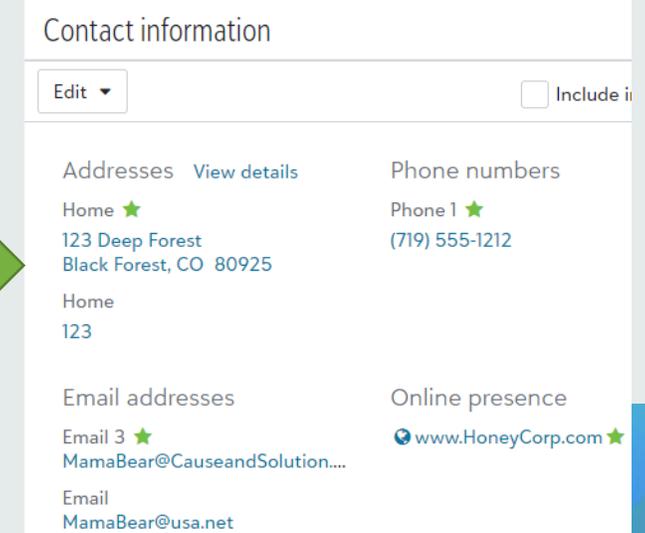
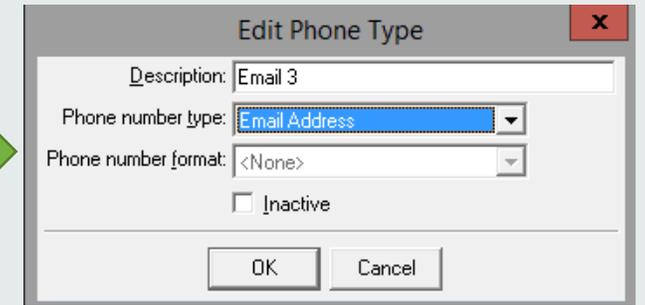
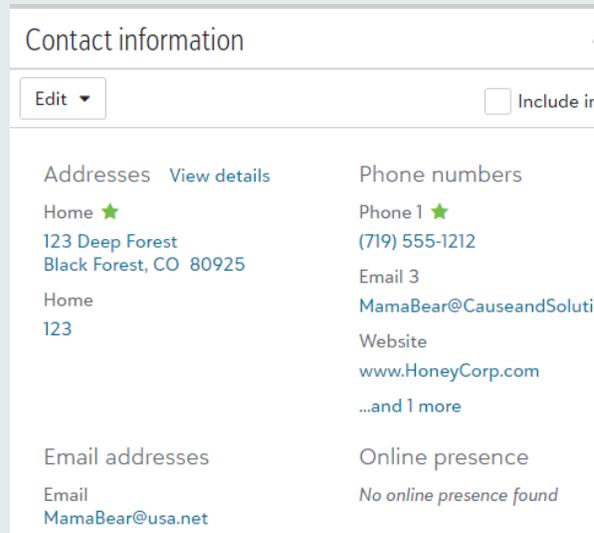
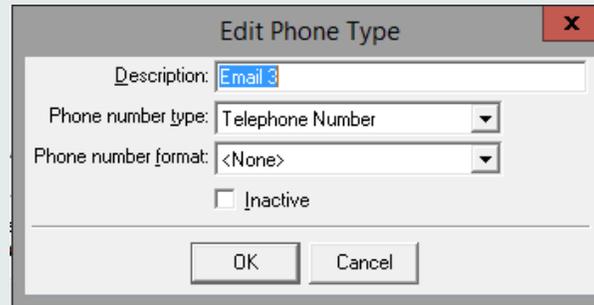
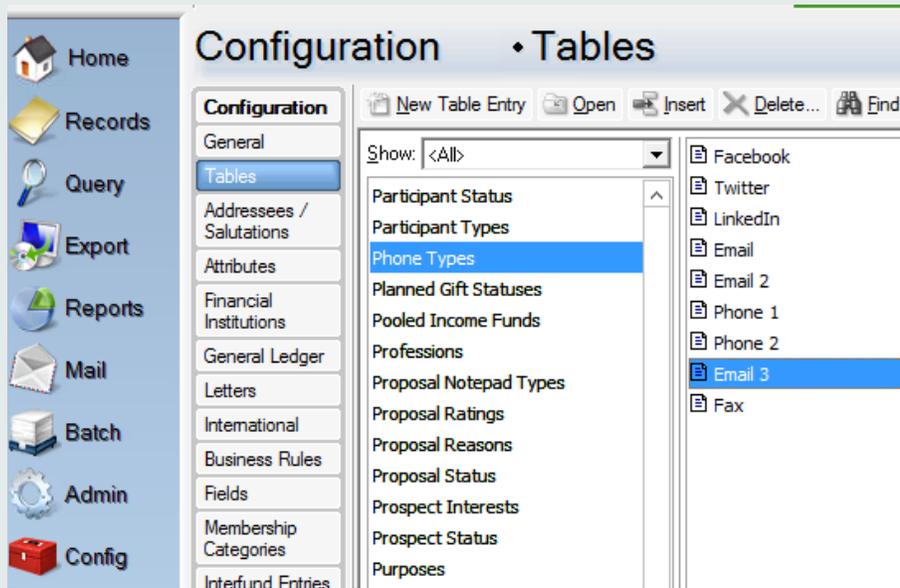
Visually things are in the wrong place.

Processes such as Email lists will not function accurately.

Results of fixing

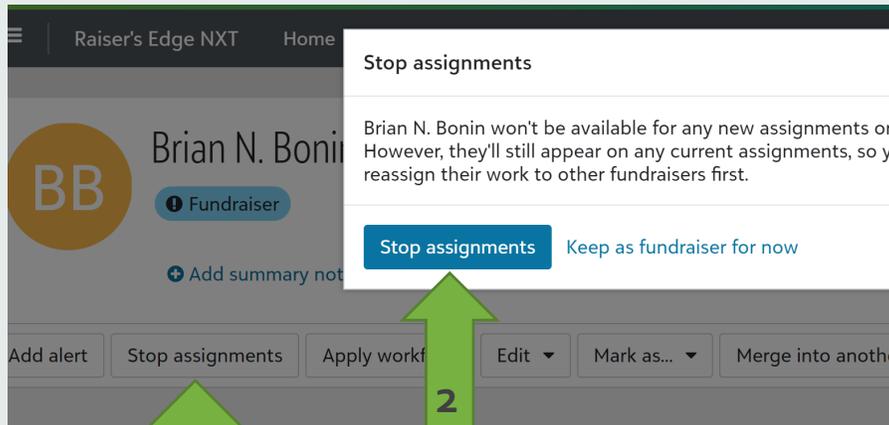
Aesthetically things are in the correct spot in both RE NXT and the RE Database view.

Correcting this allows you to mark a Primary Phone and/or a Primary Email (Fax/Link/Other) separately. In RE NXT this is shown with a ★ next to it.



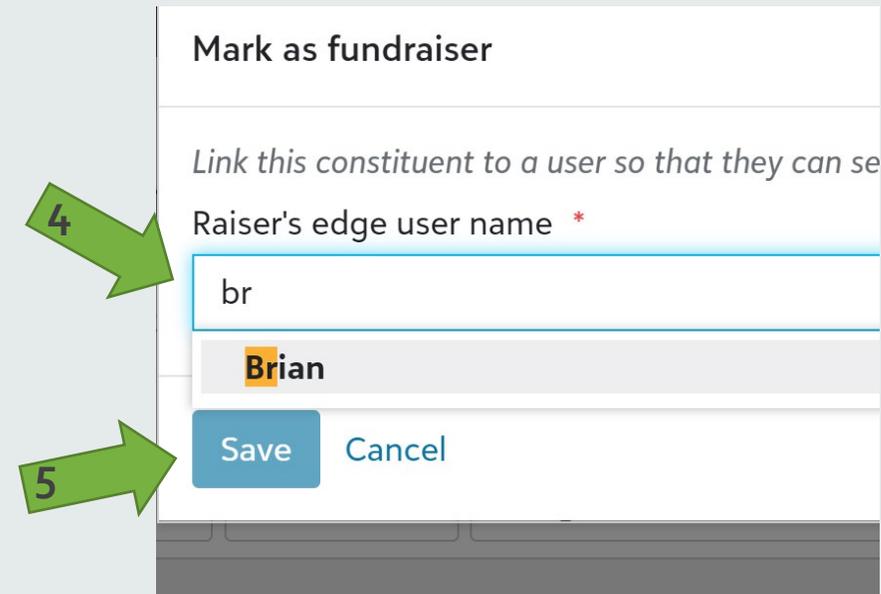
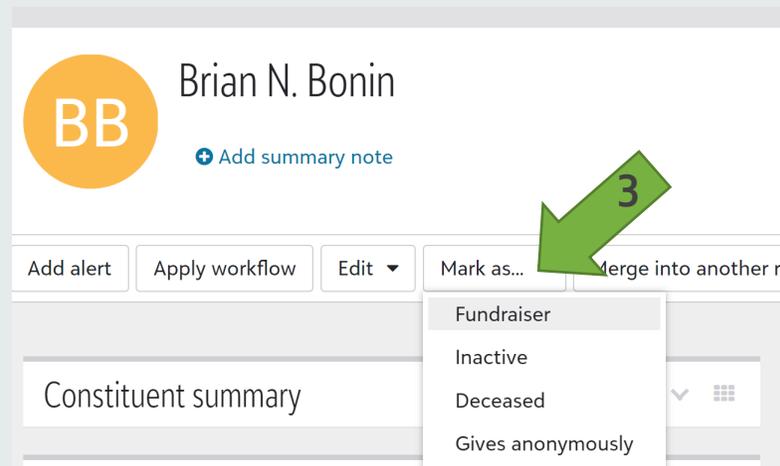
TIP #2– Correcting a Solicitor not Showing in the Work Center

Do you have a record that is turned on as a Solicitor and they are not showing in the NXT Work Center?



1. Open the Constituent Record in RENXT
2. Select 'Stop Assignments' and confirm 'Stop Assignments' on the pop-up.
3. Select 'Mark As' and then 'Fundraiser'
4. Search for the NXT user account and link the user's account by choosing their name.
5. Select 'Save' and the Constituent will now show in the Work Center.

This will not affect any of the User's current portfolio records.



Query by Account

*Done in RE Database view

A query of specific set of accounts. Normally done using the “Constituent ID” or an “Import ID”. It is recommended to use data that has unique value requirements.

Why would you do this?

You need to create a query, but you only have data in Excel/CSV that you have exported.

Example: A modified mailing list that you need a query to get extra data or so you can globally add an appeal or attribute to the record.

How to do this?

Can be done in groups of 500 records so you don’t have to manually type the data in.

Highlight a row of up to 500 “Constituent ID” or “Import ID” in your spreadsheet and Press CTRL-C (copy) in Windows.

Create a new query, choose the corresponding data type. Change the operator to “one of” now scroll all the way to the last CELL and CLICK in it. Press CTRL-V (paste) and click OK. All the IDs will load in the cells.

List exported from Raiser Edge

	A	B	C	D	E
1	Constituent ID	Constituent Import ID	Organization Name	First Name	Last Name
2	RH117970	06925-593-0000183504	My Bank		
3	RH71759	06925-593-0000118252	Nike		
4	8	00001-593-0000000019	The Big bucks Bank		
5	9	00001-593-0000000020	J&G Accounting		
6	12	00001-593-0000000023	Amasoft		
7	34	00001-593-0000000052	Bear Honey Corp		
8	39	00001-593-0000000058	Amelia Rose Designs		
9	19	00001-593-0000000031		Mama	Bear
10	20	00001-593-0000000032		Papa	Bear
11	4	00001-593-0000000015		George	Castanza
12	RH22916	22916		Jane	Doe
13	21	00001-593-0000000033		Precious	Goldilocks
14	15	00001-593-0000000026		Michael	Juarez
15	RH22917	22917		Al	King

Copy a row (max 500 at a time)

	A	B	C
1	Constituent ID	Constituent Import ID	
2	RH117970	06925-593-0000183504	M
3	RH71759	06925-593-0000118252	N
4	8	00001-593-0000000019	TI
5	9	00001-593-0000000020	JK
6	12	00001-593-0000000023	A
7	34	00001-593-0000000052	B
8	39	00001-593-0000000058	A
9	19	00001-593-0000000031	
10	20	00001-593-0000000032	
11	4	00001-593-0000000015	
12	RH22916	22916	
13	21	00001-593-0000000033	
14	15	00001-593-0000000026	
15	RH22917	22917	
16	14	00001-593-0000000025	

Paste into a query

Accurate results every time

TIP #4 – Easy way to move a gift from one Constituent to another in RE NXT

Accidentally commit a gift under the wrong account?

Recent updates in NXT now allow for a gift to be transferred from one account to another while still retaining all gift information such as coding; linked pledges, and batch numbers.

Accounts:

Can only go from Individual to Individual OR Organization to Organization.

Create a TEMP record to go from Individual to Organization. You can convert record types. You would convert the record after the first transfer and transfer again to the final record.

\$100.00 one-time gift from **Mama Bear** on 7/19/2021
ID: 72

Needs acknowledgment
Acknowledged
Posted 7/19/2021
GL post status
Needs receipt

Edit

Constituent
Gift amount

Fundraising details

Campaign None selected
Fund Clinic Restricted
Appeal 2019Plymouth Walk
Package None selected

Acknowledgements and receipts

Edit Email receipt

Acknowledgement status Needs acknowledgment
Acknowledgement letter No letter found
Receipt status Needs receipt
Receipt amount \$100.00

Edit constituent on \$100.00 gift

Constituent *

papa bear

Papa Bear : Polar
123 Deep Forest Black Forest, CO 80925

Save Cancel

TIP #5 – Did you know??? When using the Export Module...

For those that use EXPORTS...

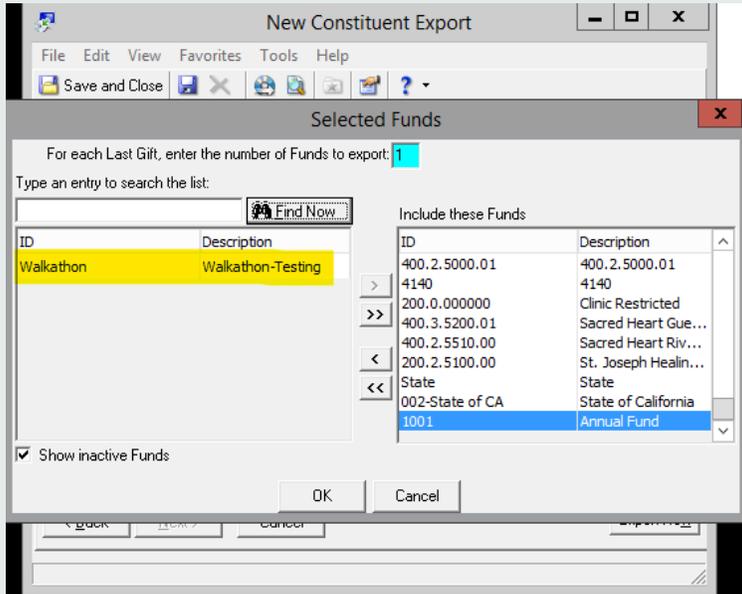
...and every time you run it you are checking to see if you have new Funds or Appeals to add to its output to get an accurate result...

A simple adjustment can save you a lot of time!

Setting it up like this:

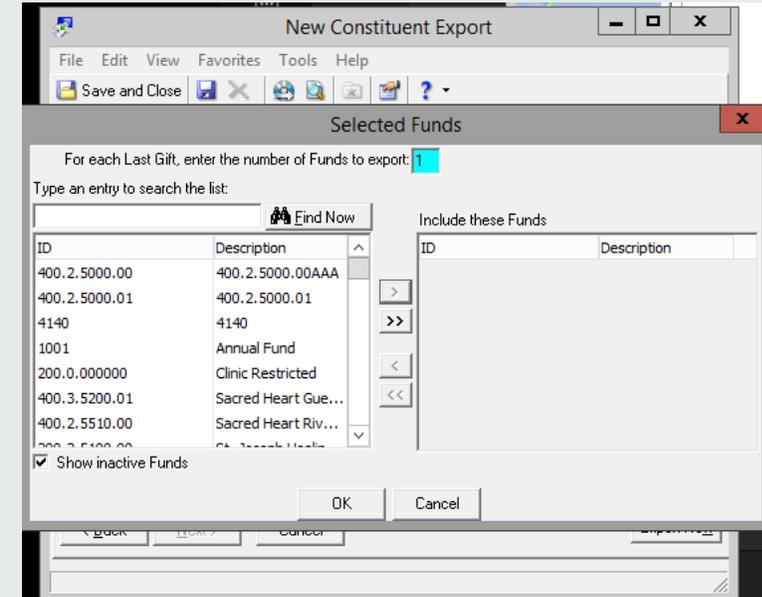
Leaving the "Include these Funds" (or appeals) section empty will give you ALL by default.

This will result in a Dynamic output!



You will have to add new Funds/Appeals each time

Set it up like this will give you ALL by default





About Cause and Solution, Inc.™

Cause and Solution's professional staff includes MBAs, CFREs, CPAs and bCRE-PRO's. We are highly skilled and experienced in fundraising development; project management; system integration; and operational and financial management for non-profits.

For more information please visit us at:
<http://www.causeandsolution.com>

