

The Raiser's EdgeTM

Tribute Gifts Guide

020112

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RE7Enterprise-GiftTribute-2012

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What Is In This Guide?



In the *Tribute Gifts Guide*, you learn to add, edit, and delete tribute gift records. You can learn about the following.

- “Honor/Memorial Tab on a Constituent Record” on page 4
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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 Gifts



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With *Honor/Memorial Tracking*, you can track detailed information about donations given in honor, memory, or celebration of an individual or organization. When you have *Honor/Memorial Tracking*, the Honor/Memorial tab appears on all constituent records and the Tribute tab appears on all gift records. From the Honor/Memorial tab of a constituent record, you can designate a constituent as an honor/memorial, set up tributes for an honor/memorial constituent, and view gifts donated to a tribute. For more information about the Honor/Memorial tab of a constituent record, see the *Tribute Data Entry Guide*.

From the Tribute tab of a gift record, you can select the tributes to which a gift should be designated. For example, your organization is a church and William Hodges, a member of your congregation, is being honored on his 80th birthday. You can set up a tribute for William Hodges on the Honor/Memorial tab of his constituent record. When you receive gifts on behalf of William Hodges, you must create a gift record for each constituent who donates a gift. On the Tribute tab of each gift record, you can designate the gift to William Hodges' tribute.

After you designate a gift to a tribute, you can easily view all gifts donated to the tribute from the constituent record of the individual or organization being honored, memorialized, or celebrated. You can also produce many tribute reports and summaries to track honor/memorial gifts. You can print lists of contributors, produce directories of honor/memorials, print gift reports detailing all donations made for a tribute, and print a summary for a specific tribute. For more information about these reports, see the *Reports Guide*.

Frequently Used Terms

This section defines words and phrases you need to know as you work with *Honor/Memorial Tracking*. If you come across an unfamiliar term when reading this or any chapter in *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 or thanked when a gift is donated to honor, memorialize, or celebrate an honor/memorial constituent. For example, you create a tribute honoring 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 a constituent who is being honored, memorialized, or celebrated by gifts donated to your organization. For example, Rebecca Lawrence has passed away and her family requests that your organization 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. For more information about designating a constituent as an honor/memorial, see the *Tribute Data Entry Guide*.

Note: Organization constituents can also be an honor/memorial.

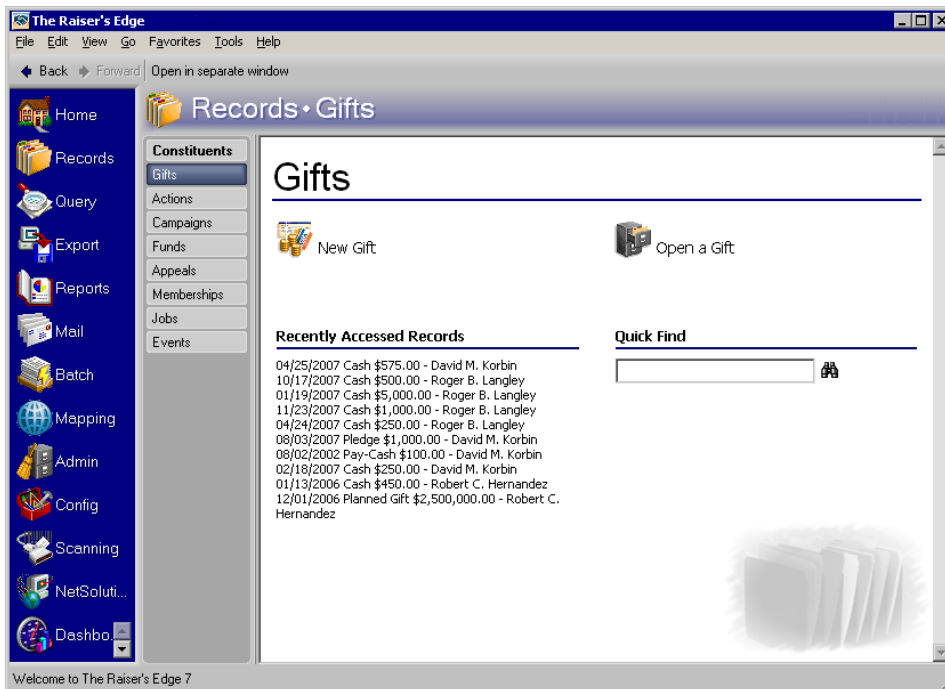
When you designate a constituent as an honor/memorial, the constituent is now an honoree in your database. You can refer to the constituent as an honor/memorial or as the honoree receiving gifts.

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. For more information about creating a tribute, see the *Tribute Data Entry Guide*.

Navigating in Gifts

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, see the *MatchFinder Guide*.

From the Gifts page, you can create new gift records for gift types of Cash, Pledge, Gift-in-Kind, Stock/Property, Recurring Gift, Planned Gift (if you use *PlannedGiftTracker*), and Other. When you use *Honor/Memorial Tracking*, the Tribute tab appears on each gift record so you can designate a gift to a particular tribute. From the Gifts page, you can also open existing gift records. To access the Gifts page, click **Records** on the Raiser's Edge bar, then click the **Gifts** link.



The Gifts page contains a list of recently accessed records. You can open any gift record in this list by clicking the gift description. To quickly find a gift donated by a constituent, enter the constituent's name in the **Quick Find** field and click the binoculars to display a list of all gifts donated by the constituent.

Accessing a Tribute Gift Record

After you create a gift record for a tribute gift, you can open the gift record from the Records page or the Gifts tab of the donor's constituent record the same way you open any other type of gift record. For more information about opening a gift record from the Records page, see the Gift Record chapter of the *Gift Records Guide*. For more information about opening a gift record from the Gifts tab on a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

Honor/Memorial Tab on a Constituent Record

Warning: Before you can add honor/memorial gifts, you must set up a tribute on the Honor/Memorial tab of a constituent record for the individual or organization being honored, memorialized, or celebrated. For more information about setting up a tribute, see the *Tribute Data Entry Guide*.

When you use *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 this constituent. A tribute explains the reason why you are honoring, memorializing, or celebrating the constituent. For example, you can set up a tribute celebrating a constituent's birthday or honoring a constituent on an anniversary.

Tribute for Kathleen R. Bently

File Edit Tribute Help

Save and Close Save Cancel Previous Next Print Help

Tribute type: In Honor of Date from: 06/03/2007

Description: Teacher of the Year Date to: 06/03/2008

Default Fund: 2008 Annual Fund

Notes: Established by the school where she worked for almost 30 years - Keheley Elementary School.

Acknowledges			
Name	Relationship	Reciprocal	Letter
Kathleen R. Bently	self	self	

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

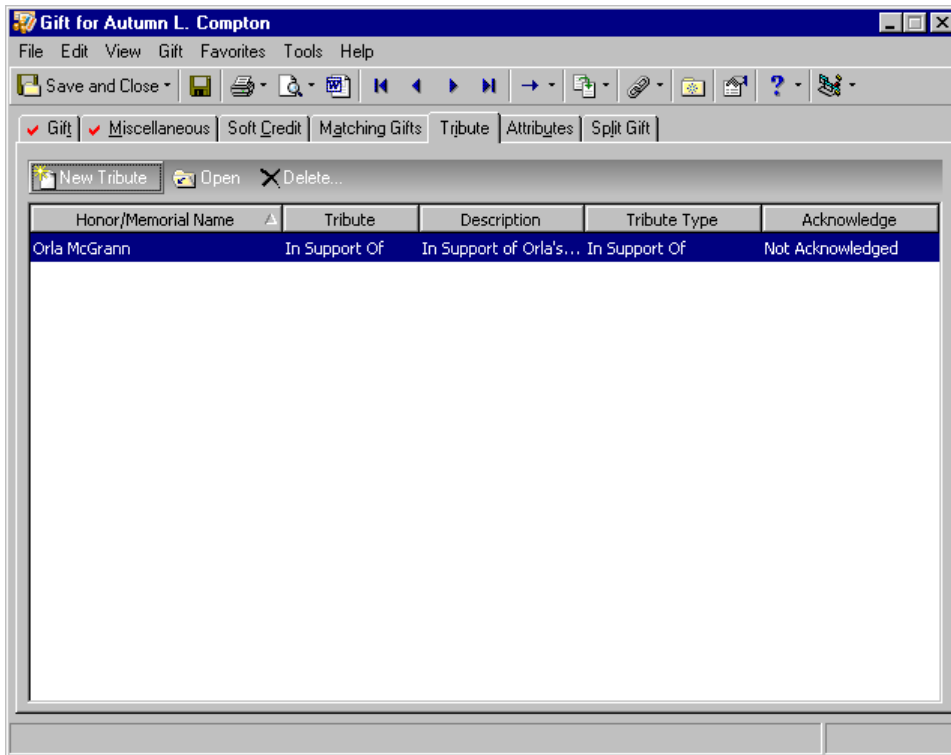
The grid on the Honor/Memorial tab displays all tributes created for the constituent. For more information about designating constituents as honor/memorials and setting up tributes, see the *Tribute Data Entry Guide*.

Tribute Tab on a Gift Record

From the Tribute tab of a gift record, you can designate a gift to any existing active tribute in the database. For example, your organization supports cancer research. Orla McGrann, one of your constituents, is battling cancer. Orla's friends want to give money to your organization on her behalf to support cancer research. On the Honor/Memorial tab of Orla McGrann's constituent record, you must mark the **Constituent is an honor/memorial** checkbox and set up a tribute.

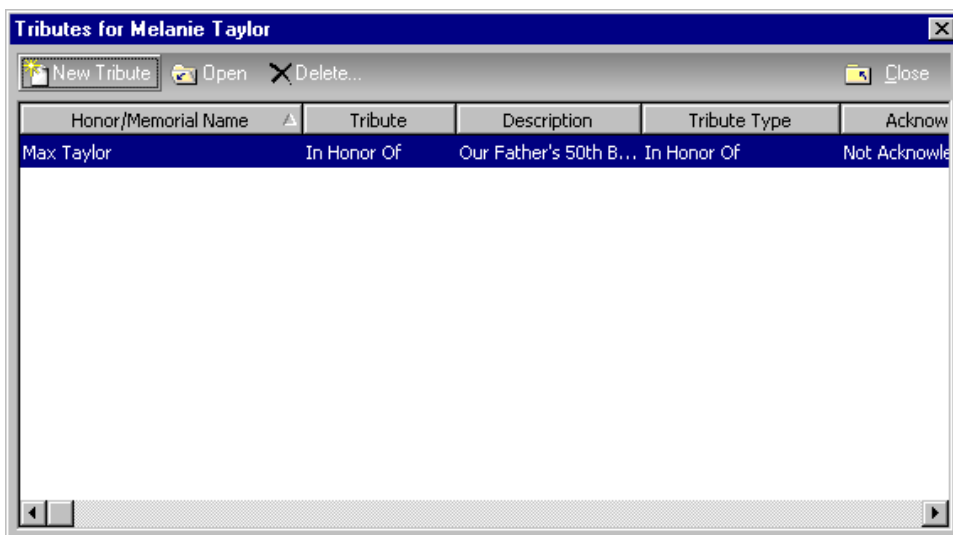
Warning: When setting up a tribute, you must mark the **Gifts may be given to this tribute** checkbox if you want to receive gifts on behalf of the honor/memorial constituent.

When you receive a gift on behalf of Orla McGrann, you need to create a gift record on the donor's constituent record as you would for any other gift. For more information about creating a gift record, see the Gift Record chapter of the *Gift Record Guide*. After you create a gift record, select the Tribute tab.



From this tab, you can select the tributes to which the gift was donated. For example, you can designate the gift toward the tribute supporting Orla McGrann's battle against cancer. The grid displays all tributes to which you have currently designated the gift. You can open the tributes in the grid to view the acknowledgees you should notify about this gift.

If you are entering tribute gifts through a gift batch, you can also designate a gift to any existing tribute in the database. To enter tribute information for a gift, select **Gift, Tribute** from the menu bar on the Data Entry screen of the gift batch. The Tributes screen appears.



This screen has the same options available as the Tribute tab of a gift record.

Adding an Honor/Memorial Gift

When you receive a gift donated to a specific tribute, you need to create a gift record for the gift, just as you would for any other gift you receive. You can create a gift record from the Gifts page or the Gifts tab of a donor's constituent record. You can also create a gift record using a gift batch. If you create a gift record from the Gifts page or the Gifts tab of the donor's constituent record, you can use the Tribute tab to select the specific tribute to which the gift should be designated. If you create a gift record using a gift batch, you can use the Tributes screen to select the specific tribute to which the gift should be designated. To access the Tributes screen, select **Gift, Tribute** from the menu bar of the Data Entry screen when your cursor is in the row of a gift for which you want to add tribute information.

Any type of gift can be designated to an existing tribute. For example, your organization is a school and you are building a new addition. This addition will contain a computer lab honoring Dr. Harry T. Anderson's lifetime achievement in the area of computer science. You can create a tribute honoring Dr. Anderson and specify that all gifts donated to this tribute benefit the new computer lab. Frank Shelton, an alumnus, decides to donate 10 new computers to the lab. On the Tribute tab of Frank Shelton's gift record, you can specify that this gift-in-kind of 10 computers be designated toward Dr. Anderson's tribute.

Although gifts are donated to specific tributes, you must still assign the gift to a campaign, fund, and appeal so you can track the financial progress of your fundraising efforts. When you raise money for the new addition of your school, you can create a campaign called "New Addition" and a fund called "Computer Lab".

Before you can designate gifts to a tribute, you must:

- ☐ Mark the **Constituent is an honor/memorial** checkbox on the Honor/Memorial tab of the honor/memorial's constituent record.
- ☐ Create a tribute for the honor/memorial constituent.
- ☐ Mark the **Gifts may be given to this tribute** checkbox for the tribute.

For more information about adding new tributes, editing existing tributes, and deleting existing tributes from the Honor/Memorial tab of a constituent record, see the *Tribute Data Entry Guide*.

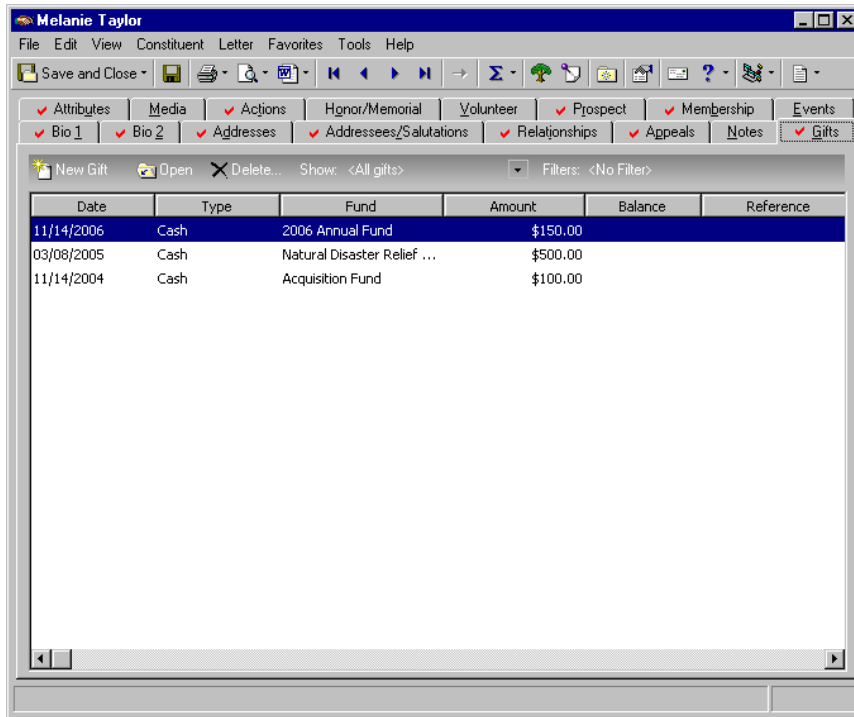
► Adding an honor/memorial gift from the Gifts tab of the donor's constituent record

Before you can add honor/memorial gifts, you must designate the constituent as an honor/memorial and set up the tribute on the constituent record of the honor/memorial constituent. Also, you must mark the **Gifts may be given to this tribute** checkbox when you set up the tribute. For more information about setting up a tribute, see the *Tribute Data Entry Guide*.

Scenario: Melanie Taylor, Max and Michelle Taylor's daughter, just donated \$1,000 to your organization in honor of her parents' 25th wedding anniversary. Add Melanie's gift to your database and designate the gift to the tribute you created for Max and Michelle. Before you receive gifts on behalf of an honor/memorial constituent, you need to set up a tribute. For information about setting up this tribute, see the *Tribute Data Entry Guide*.

Note: You can add gift annotations to your gift records. For example, if you have a unique constituent that requires specific gift data entry, you can display a message that says "Please see the Supervisor before changing information to this gift record." The message displays when a user opens the constituent record or the gift record. To add an annotation, open the gift record, and select **Edit, Annotate** from the menu bar. The Annotate screen appears. Enter your message in the box. Mark the **Display annotation automatically** checkbox and the message appears whenever the record opens.

1. From Melanie Taylor's constituent record, select the Gifts tab. For more information about opening a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.



2. On the action bar, click **New Gift**. The New Gift screen appears.

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.

- From the New Gift screen, select the Gift tab and add the information about Melanie's gift as shown on the screen below. For more information about adding a gift record, see the Gift Record chapter of the *Gift Records Guide*.

The screenshot shows the 'New Gift for Melanie Taylor' window with the 'Gift' tab selected. The fields are as follows:

- Constituent: Melanie Taylor, ID: 157
- Gift type: Cash
- Gift subtype: (empty)
- Gift date: 05/17/2005
- Amount: \$1,000.00
- Campaign: Annual Campaign
- Fund: 2005 Annual Fund
- Appeal: Direct Mailing
- Package: (empty)
- Solicitors: (empty)
- Reference: (empty)
- Acknowledge: Not Acknowledged
- Letter: ☒ Letter, ☐ Tribute Ack, ☐ Benefits
- Receipt: Not Receipted
- Receipt amt/no.: \$1,000.00
- Pay method: Credit Card, ☐ EFT?
- Card no./exp.: *****9933, 11/2007
- Card type: Visa
- Auth. code: (empty)
- Cardholder: Melanie Taylor
- Date added: (empty)

Tip: To save time entering a gift, on the Honor/Memorial tab of a tribute record, select a fund in the **Default Fund** field. When you add a gift from a donor, go directly to the Tribute tab of a new gift record. After you select the tribute name, the fund defaults automatically from the tribute record to the **Fund** field on the Gift tab of the gift record.

- Select the Tribute tab.

The screenshot shows the 'New Gift for Melanie Taylor' window with the 'Tribute' tab selected. The table below is visible:

Honor/Memorial Name	Tribute	Description	Tribute Type	Acknowledge
New Tribute Open Delete...				

- On the action bar, click **New Tribute** to designate this gift to the tribute honoring Max and Michelle's 25th wedding anniversary. The New Tribute Gift screen appears.

Warning: On occasion, a tribute may be applicable to more than one constituent in the database. For example, Max and Michelle Taylor are both constituents in your database. However, the tribute should be entered on only one constituent record.

- In the **Honor/Memorial** field, click the binoculars to search for Max Taylor, who is the constituent being honored. You are searching for Max Taylor because the tribute was entered on the Honor/Memorial tab of his constituent record. The Open screen appears.

- In the **Last/Org name** field, enter "Taylor".
- Click **Find Now**.

On the Open screen, 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 detailed information on how to use these fields, see the Program Basics chapter of the *Program Basics Guide*.

Note: If a record does not appear on the Open screen when you search for an honor/memorial, mark the **Constituent is an honor/memorial** checkbox on the Honor/Memorial tab of the constituent record. For more information about marking a constituent as an honor/memorial, see the *Tribute Data Entry Guide*.

9. In the Results grid, highlight Max Taylor.

The 'Open' window displays a search interface. At the top, the 'Find:' dropdown is set to 'Constituent' and the search query is '<Default>'. Below this is a table with the following data:

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

Buttons on the right include 'Open', 'Cancel', 'Add New', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'. Below the table, there are search criteria fields for Last/Org name, First Name, Constituent ID, SSN, Membership ID, Bank acct. no., Address lines, City, State, ZIP, Class of, and Credit card no. There are also checkboxes for 'Constituent is an honor/memorial', 'Display inactive constituents', 'Display deceased constituents', 'Check spouse name', 'Check aliases', 'Exact match only', 'Check nickname', and 'Check contact name'.

10. Click **Open**. Max Taylor's name appears in the **Honor/Memorial** field. All defaults from the tribute entered on the Honor/Memorial tab of Max Taylor's constituent record appear on the New Gift Tribute screen.

The 'New Tribute Gift for Miss Melanie Taylor' window shows the following fields and values:

- Honor/Memorial: Max Taylor
- ID: 77
- Tribute: In Honor Of
- Description: Max and Michelle's 25th Wedding Anniversary
- Tribute Type: In Honor Of
- Acknowledge: Not Acknowledged

Below these fields is a table titled 'Acknowledges' with the following data:

Ackn?	Name	Relationship	Reciprocal	Letter	Acknowledged On
☒	Melanie Taylor	Daughter	Father	Tribute Ack	
☒	Max Taylor	Self	Self	Tribute Ack	
☒	Michelle Taylor	Spouse	Spouse	Tribute Ack	

At the bottom, it says 'Press F7 for table lookup'.

Warning: Although you can add a new tribute by clicking the button in the **Tribute** field, we recommend adding a new tribute from the honor/memorial's constituent record so a duplicate tribute is not created. For more information about setting up a tribute, see the *Tribute Data Entry Guide*.

11. After you enter Max Taylor in the **Honor/Memorial** field, "In Honor Of" defaults in the **Tribute** field. Because this is the tribute to which Melanie's gift should be designated, you do not need to change this entry.

After you select the tribute, the tribute description displays next to the **Tribute** field. The **Acknowledges** grid lists the acknowledges entered on the tribute honoring Max and Michelle Taylor. For more information about adding acknowledgees to a tribute, see the *Tribute Data Entry Guide*.

12. In the **Tribute Type** field, enter “For the Anniversary Of”, which is the specific reason why Melanie is donating the gift.
13. In the **Acknowledge** field, you can leave the default, “Not Acknowledged”, to indicate you have not sent letters to the honor/memorial acknowledgees. You can also select Acknowledged or Do Not Acknowledge. For example, if you already created handwritten thank you letters to notify the acknowledgees that Melanie donated a gift to this tribute, select “Acknowledged” in the **Acknowledge** field.
14. In the **Acknowledges** grid, leave the checkboxes in the **Ackn?** column next to Max and Michelle marked to indicate you want to notify them that their daughter, Melanie, donated a gift. Melanie Taylor appears in the **Acknowledges** grid because she is entered in the **Acknowledges** grid for the tribute entered on Max Taylor’s constituent record. Because Melanie donated this gift, unmark the checkbox in the **Ackn?** column next to her name. You can track whether Melanie has been acknowledged for this gift in the **Acknowledge** field on the Gift tab of her gift record.

New Tribute Gift for Miss Melanie Taylor

File Edit Tribute Help

Save and Close

Honor/Memorial: Max Taylor ID: 77

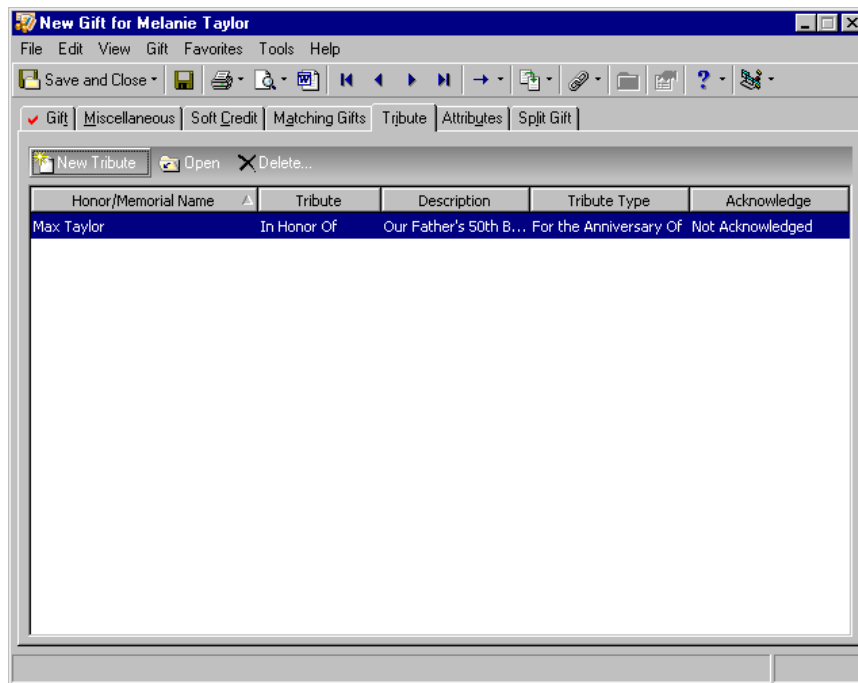
Tribute: In Honor Of Description: Max and Michelle's 25th Wedding Anniversary

Tribute Type: For the Anniversary Of

Acknowledge: Not Acknowledged

Acknowledges					
Ackn?	Name	Relationship	Reciprocal	Letter	Acknowledged On
☐	Melanie Taylor	Daughter	Father	Tribute Ack	
☒	Max Taylor	Self	Self	Tribute Ack	
☒	Michelle Taylor	Spouse	Spouse	Tribute Ack	

15. Click **Save and Close** on the toolbar. You return to the Tribute tab on Melanie's gift record. The honor/memorial appears in the grid.



16. To save and close Melanie's gift record, click **Save and Close** on the toolbar.

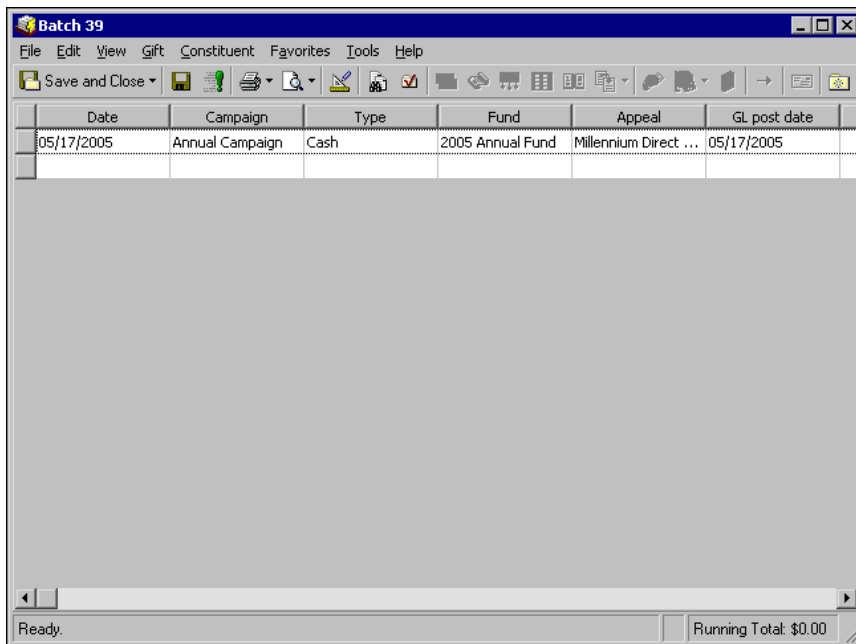
► Adding an honor/memorial gift to a gift batch

Before you can add honor/memorial gifts, you must designate the constituent as an honor/memorial and set up the tribute on the constituent record of the honor/memorial constituent. Also, you must mark the **Gifts may be given to this tribute** checkbox when you set up the tribute. For more information about setting up a tribute, see the *Tribute Data Entry Guide*.

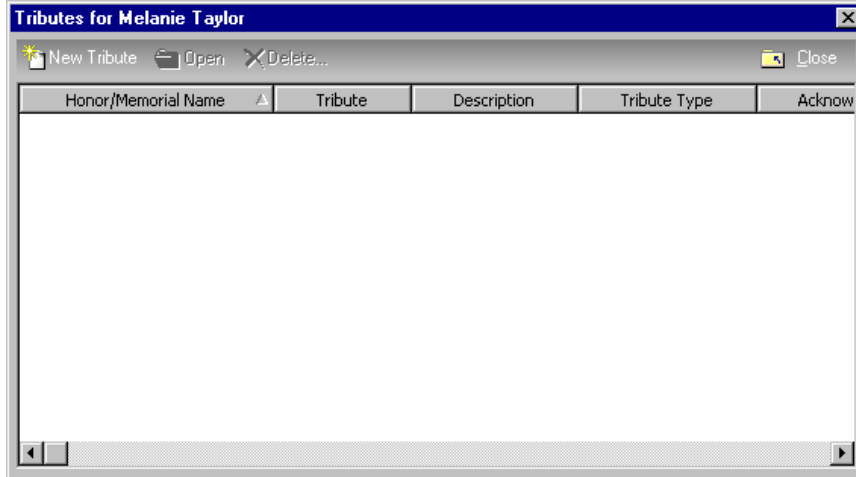
Scenario: Melanie Taylor, Max and Michelle Taylor's daughter, donated \$1,000 to your organization in honor of her parents' 25th wedding anniversary. Add Melanie's gift to your database and designate the gift to the tribute you created for Max and Michelle. Before you receive gifts on behalf of an honor/memorial constituent, you need to set up a tribute. For more information about setting up tributes, see the *Tribute Data Entry Guide*.

Note: While in the gift record, if you ever need to view the batch number a gift was posted through, select **File, Properties** on the menu bar. The **Batch number** appears on the Gift Properties screen.

1. From a gift batch, add a gift of \$1,000 for Melanie Taylor as shown on the screen below. For more information about setting up a gift batch and entering gifts into the batch, see the *Batch Guide*.



2. With your cursor in the row of the batch containing Melanie's gift, select **Gift, Tribute** from the menu bar. The Tribute screen appears.



Tip: To save time entering a gift, on the Honor/Memorial tab of a tribute record, select a fund in the **Default Fund** field. When you add a gift from a donor in *Batch*, first click **Tribute** on the toolbar. On the New Tribute screen in the **Honor/Memorial** field, select the name of the tribute and save the information. The fund defaults automatically from the tribute record to the **Fund** column in the batch row.

- On the toolbar, click **New Tribute**. The New Tribute Gift screen appears.

Warning: On occasion, a tribute may be applicable to more than one constituent in the database. For example, Max and Michelle Taylor are both constituents in your database. However, the tribute should be entered on only one constituent record.

- In the **Honor/Memorial** field, click the binoculars to search for Max Taylor who is the constituent being honored. You are searching for Max Taylor because the tribute was entered on the Honor/Memorial tab of his constituent record and a gift was given in his honor. The Open screen appears.

Note: On the Open screen, 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 detailed information on how to use these fields, see the Program Basics chapter of the *Program Basics Guide*.

- In the **Last/Org name** field, enter “Taylor”.
- Click **Find Now**.

7. In the Results grid, highlight Max Taylor. Click **Open**. Max Taylor's name appears in the **Honor/Memorial** field. All defaults from the tribute entered on the Honor/Memorial tab of Max Taylor's constituent record appear on the New Tribute Gift screen.

New Tribute Gift for Miss Melanie Taylor

File Edit Tribute Help

Save and Close

Honor/Memorial: Max Taylor ID: 77

Tribute: In Honor Of Description: Max and Michelle's 25th Wedding Anniversary

Tribute Type: In Honor Of

Acknowledge: Not Acknowledged

Acknowledges					
Ackn?	Name	Relationship	Reciprocal	Letter	Acknowledged On
☒	Melanie Taylor	Daughter	Father	Tribute Ack	
☒	Max Taylor	Self	Self	Tribute Ack	
☒	Michelle Taylor	Spouse	Spouse	Tribute Ack	

Press F7 for table lookup

Warning: Although you can add a new tribute by clicking the button in the **Tribute** field, we recommend adding a new tribute from the honor/memorial's constituent record so a duplicate tribute is not created. For more information about setting up a tribute, see the *Tribute Data Entry Guide*.

8. After you enter Max Taylor in the **Honor/Memorial** field, "In Honor Of" defaults in the **Tribute** field. Because this is the tribute to which Melanie's gift should be designated, you do not need to change this entry.
- After you select the tribute, the tribute description displays next to the **Tribute** field. The **Acknowledges** grid lists the acknowledgees entered on the tribute honoring Max and Michelle Taylor. For more information about adding acknowledgees to a tribute, see the *Tribute Data Entry Guide*.
9. In the **Tribute Type** field, enter "For the Anniversary Of", which is the specific reason why Melanie is donating the gift.
10. In the **Acknowledge** field, leave the default, "Not Acknowledged", to indicate you have not sent letters to the honor/memorial acknowledgees. You can also select Acknowledged or Do Not Acknowledge. For example, if you already created handwritten thank you letters to notify the acknowledgees that Melanie donated a gift to this tribute, select "Acknowledged" in the **Acknowledge** field.

11. In the **Acknowledgees** grid, make sure the checkboxes in the **Ackn?** column next to Max and Michelle are marked to indicate you want to notify them that their daughter Melanie donated a gift. Melanie Taylor appears in the **Acknowledgees** grid because she is entered in the **Acknowledgees** grid for the tribute entered on Max Taylor's constituent record. Because Melanie donated this gift, unmark the checkbox in the **Ackn?** column next to her name. You can track whether Melanie has been acknowledged for this gift in the **Acknowledge** field on the Gift tab of her gift record.

Acknowledgees					
Ackn?	Name	Relationship	Reciprocal	Letter	Acknowledged On
☐	Melanie Taylor	Daughter	Father	Tribute Ack	
☒	Max Taylor	Self	Self	Tribute Ack	
☒	Michelle Taylor	Spouse	Spouse	Tribute Ack	

12. Click **Save and Close** on the toolbar. You return to the Tributes screen. Max Taylor's tribute appears in the grid.

Honor/Memorial Name	Tribute	Description	Tribute Type	Acknow
Max Taylor	In Honor Of	Our Father's 50th B...	In Honor Of	Not Acknowledge

13. To close the Tributes screen, click **Close** on the action bar.
14. Click **Save and Close** on the toolbar to save and close the gift batch.
15. To add this gift record to the database, you need to commit the gift batch. For more information about committing a gift batch, see the *Batch Guide*.

Editing a Tribute

After you add an honor/memorial gift, there may be instances when you need to edit the tribute associated with the gift. For example, Phyllis Yang donates a gift to your organization in honor of Max and Michelle Taylor's 25th wedding anniversary. After you add Phyllis's gift, Bethany Taylor, Max and Michelle's other daughter, calls and requests to be notified when gifts are donated to her parents' tribute. You first need to add Bethany to the Acknowledgees grid for the tribute entered on the Honor/Memorial tab of Max Taylor's constituent record. When you next open Phyllis's gift record, Bethany is listed as an acknowledgee from the Tribute tab. You can edit this tribute by marking the **Ackn?** checkbox for Bethany.

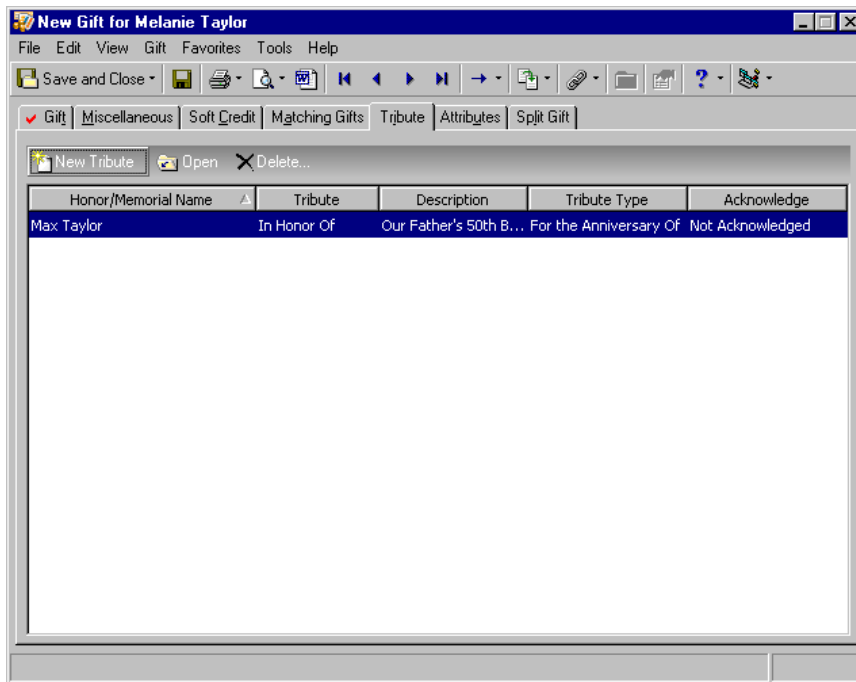
Any changes you make to the tribute entered on the Tribute tab of a gift record do not affect the original tribute created from the Honor/Memorial tab of a constituent record. For example, if you change this information entered in the **Tribute Type** field on a gift record, the program does not update this information in the **Tribute Type** field on a Tribute entered on the Honor/Memorial tab of a constituent record.

If you add a tribute gift from a gift batch, you can edit the information entered in the gift batch if you have not yet committed the gift batch to the database. After you commit the gift batch to the database, you can edit the tribute information from the Tribute tab of the gift record. This section explains both methods editing tribute information for a gift.

► Editing tribute information entered on a gift record

You can use this procedure to edit tribute information entered on an existing gift record. If you added tribute information to a gift using a gift batch, you must first commit the gift batch to the database before you can edit the gift record. If you have not committed the batch to the database, you can also edit tribute information from a gift batch. For more information, see "Editing tribute information entered in a gift batch" on page 18.

1. From a gift record, select the Tribute tab. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.



2. In the Tribute grid, highlight the tribute you want to edit.

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

Acknowledges					
Ackn?	Name	Relationship	Reciprocal	Letter	Acknowledged On
☐	Melanie Taylor	Daughter	Father	Tribute Ack	
☒	Max Taylor	Self	Self	Tribute Ack	
☒	Michelle Taylor	Spouse	Spouse	Tribute Ack	

4. You can edit any information in the **Tribute Type** field, **Acknowledge** field, or **Acknowledges** grid. If you need to change the entries in the **Honor/Memorial** or **Tribute** fields, you need to delete the tribute entered on the gift record and add a new tribute.
5. When you finish editing the tribute, click **Save and Close** on the toolbar to save the tribute for this gift and return to the Tribute tab of the gift record.
6. Click **Save and Close** on the toolbar to save the changes and close the gift record.

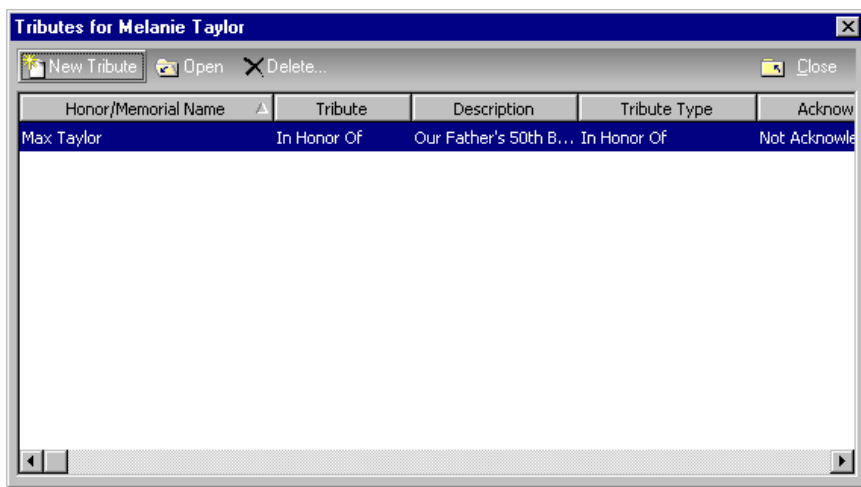
► **Editing tribute information entered in a gift batch**

You can use this procedure to edit the tribute information for a gift entered in a gift batch if the gift batch has not yet been committed to the database. If you committed the batch to the database, you can edit the tribute information from the gift record. For more information, see “Editing tribute information entered on a gift record” on page 17.

1. Open the gift batch containing the gift with the tribute information you want to edit. For more information about opening a gift batch, see the *Batch Guide*.

Date	Campaign	Type	Fund	Appeal	GL post date
05/17/2005	Annual Campaign	Cash	2005 Annual Fund	Millennium Direct ...	05/17/2005

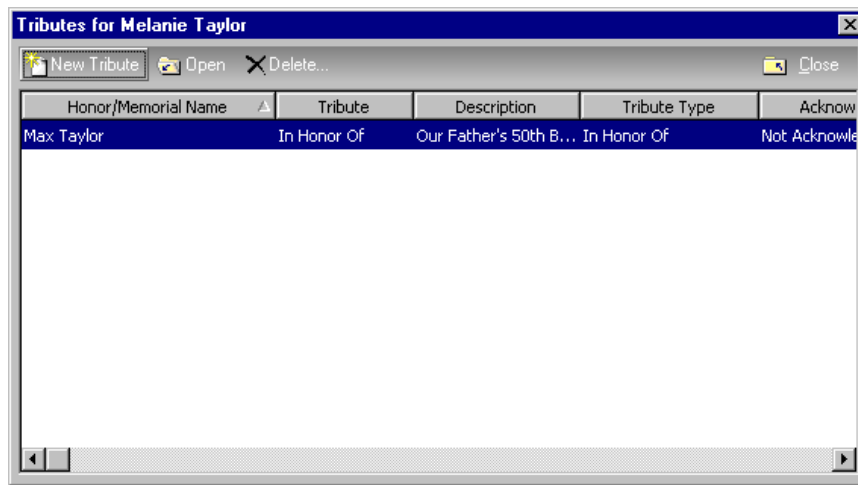
2. With your cursor in the row of the batch containing the gift with the tribute information you want to edit, select **Gift, Tribute** from the menu bar. The Tributes screen appears.



3. In the Tribute grid, highlight the tribute you want to edit.
4. On the action bar, click **Open**. The Tribute screen appears.

5. You can edit any information in the **Tribute** field, **Tribute Type** field, **Acknowledge** field, or **Acknowledgees** grid. If you need to change the entry in the **Honor/Memorial** field, you need to delete this tribute and add a new tribute.

6. When you finish editing the tribute, click **Save and Close** on the toolbar to save the tribute for this gift. You return to the Tributes screen.



7. To close the Tributes screen, click **Close** on the action bar.
8. Click **Save and Close** on the toolbar to save and close the gift batch.

To add this gift record to the database, you need to commit the gift batch. For more information about committing a gift batch, see the *Batch Guide*.

Deleting a Tribute from a Gift Record

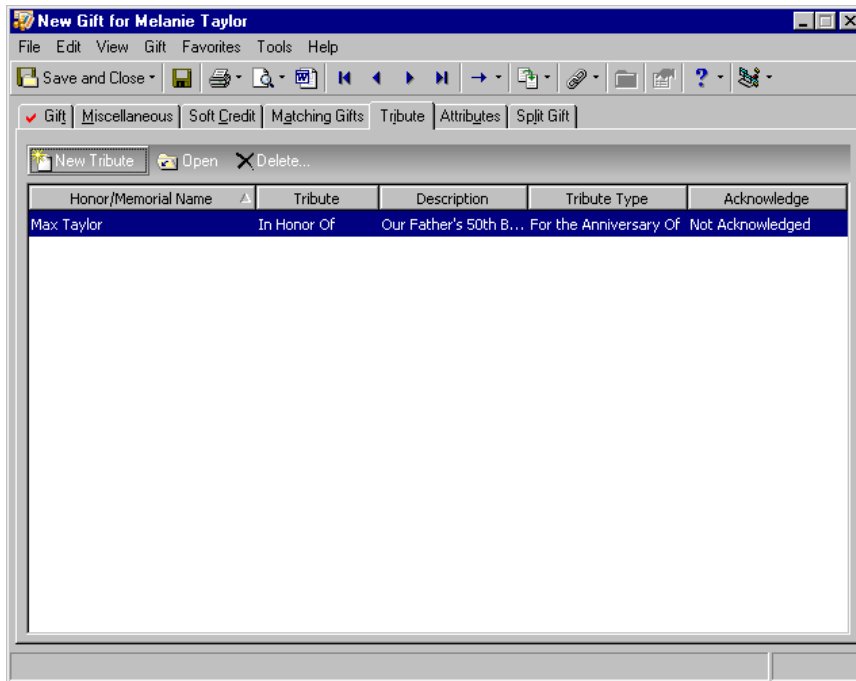
On occasion, you may want to remove a tribute from a gift record without deleting the gift record from the database. For example, Sarah James donates a gift to your organization in memory of her friend, Samantha Langley. You create a gift record and add Samantha's tribute on the Tribute tab of Sarah's gift record. If Sarah decides she wants to donate the gift to your organization, but does not want to associate the gift with Samantha's tribute, you can delete Samantha's tribute from Sarah's gift record without deleting the gift record from your database.

You can also delete tribute information from a gift entered in a gift batch, if you have not yet committed the batch to the database. This section explains both methods deleting tribute information from a gift record.

► **Deleting tribute information from a gift record**

This procedure deletes a tribute from a gift record without removing the gift record from the database. For more information about deleting a gift record from the database, see the Gift Record chapter of the *Gift Record Guide*.

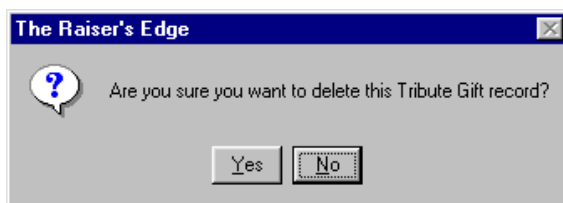
1. From a gift record, select the Tribute tab. For more information about opening a gift record, see the Gift Record chapter of the *Gift Record Guide*.



2. In the grid, highlight the tribute you want to delete.

Warning: When you delete the tribute from a gift record, the gift is no longer designated toward the tribute. However, the tribute still remains in your database. For information about deleting a tribute from an honor/memorial's constituent record, see the *Tribute Data Entry Guide*.

3. On the action bar, click **Delete**. A message appears.

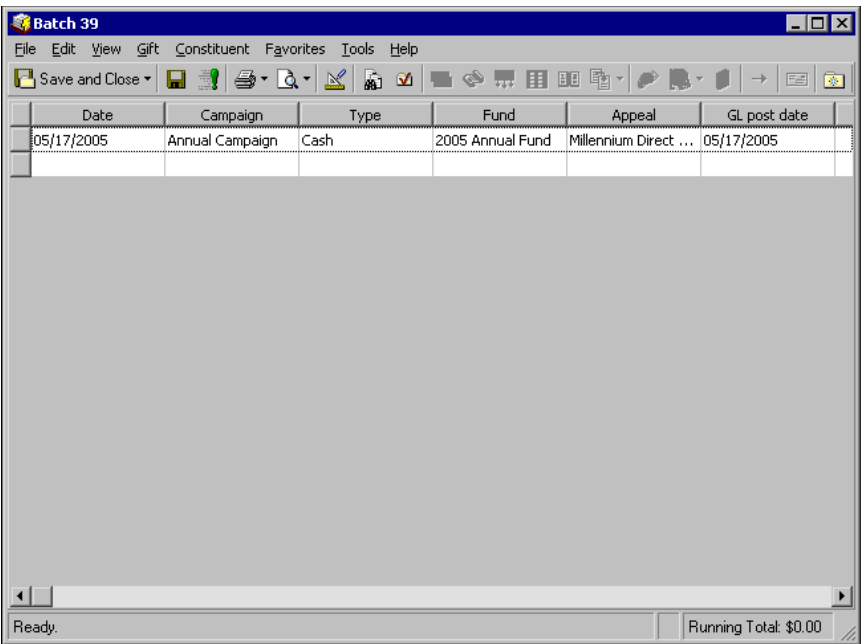


4. To delete the tribute from the gift record, click **Yes**.
5. Click **Save and Close** on the toolbar to close the gift record.

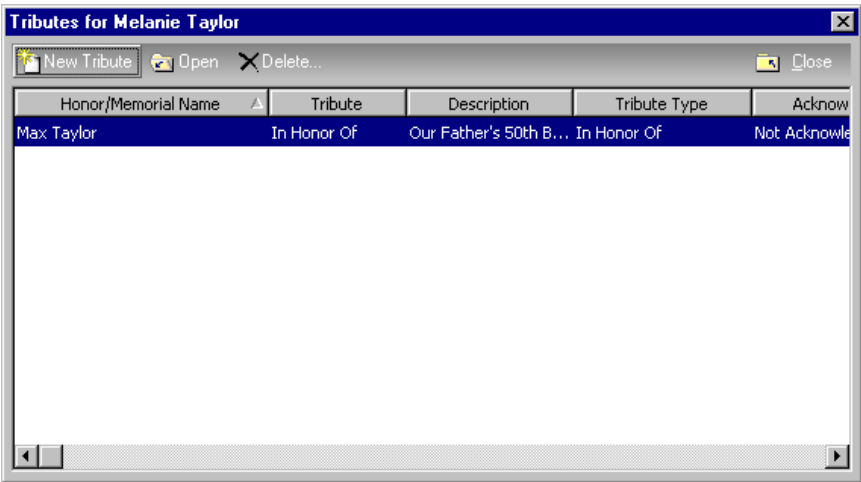
► **Deleting tribute information from a gift in a gift batch**

You can use this procedure to delete tribute information from a gift entered in a batch without deleting the gift from the batch if you have not yet committed the batch to the database. If you committed the batch to the database, you can delete the tribute information from the gift record. For more information, see “Deleting tribute information from a gift record” on page 21.

1. Open the gift batch containing the gift with the tribute information you want to delete. For more information about opening a gift batch, see the *Batch Guide*.

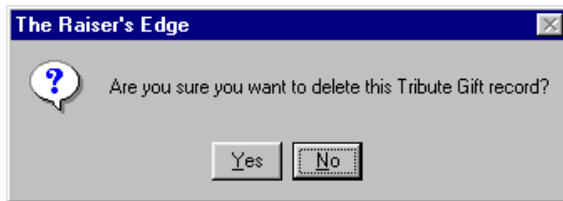


2. With your cursor in the row of the batch containing the gift with the tribute information you want to delete, select **Gift, Tribute** from the menu bar. The Tributes screen appears.



3. In the Tributes screen, highlight the tribute you want to delete.

4. On the action bar, click **Delete**. A message appears.



Warning: When you delete the tribute from a gift in a batch, the gift is no longer designated toward the tribute. However, the tribute still remains in your database. For information about deleting a tribute from an honor/memorial's constituent record, see the *Tribute Data Entry Guide*.

5. To delete the tribute information from the gift, click **Yes**. To return to the Tributes screen without deleting the tribute, click **No**.
6. Click **Close** on the action bar to return to the gift batch.
7. On the toolbar, click **Save and Close** to save the changes and close the gift batch.

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