

Managing Honor / Memorial Constituents

Helpful Hint: If the primary person is deceased, you would use the Swap feature and put them in the Spouse position. Update salutation formats on the Address and any additional salutation formats to singular. If it is a single constituent, deactivate, uncheck send mail, clear email, web id, etc.

How to flag a constituent as Honor or Memorial:

1. Go to the constituent search screen and find the constituent that will be honored/memorialized. Edit their constituent record and go to the INFO tab.
3. You will see the H/M drop down. Choose H or M. You will notice the full name format defaults. Edit this to how you want this to display on the Honor/Memorial Report or in exports.

Honor/Memorial: M (dropdown) In Memory of: Matches Gifts

H/M Name: Mr. Test User

Home Page: [empty field]

How to add Honored / Memorialized Constituent to a Gift:

When donations come in you will enter the gift as usual, and you will also choose the Honor/Memorial tab

Gift | Fund Distribution | Honor / Memorial | Matching | Soft Credits | Giving Attributes | Membership | Comments | Giv. Summary

| I.D. | Name | Type | Description |
|------|------|------|-------------|
| | | | |

New (circled in red)

Delete

Click New – Search for the person you marked as M on the info tab.

Gift | Fund Distribution | Honor / Memorial | Matching | Soft Credits | Giving Attributes | Membership | Comments | Giv. Summary

| I.D. | Name | Type | Description |
|------|------|------|-------------|
| | | | |

New

Delete

Constituent Search

Search For: [Open]

I.D.: [USER]

Last Name (Sort Key): [SEARCH]

Sort By: Last Name (Sort Key) | Ascending

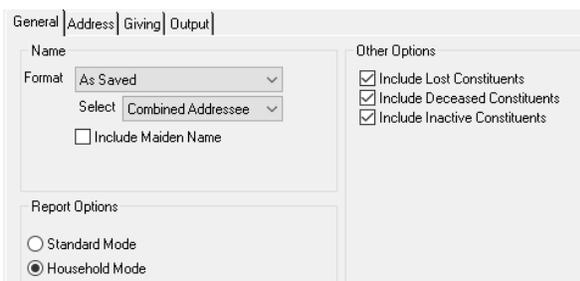
| Name | I.D. | Type | Constituency | Class Yr |
|------------------|-------|------|---------------|----------|
| Mr. Test J. User | 00006 | P | Alumni Parent | |

How to run the Honor / Memorial Report

1. Go to Reports
2. Go to Giving Detail Report section
3. 2nd report down is the Honor/Memorial Giving Report.
4. Depending on what you want to see on report dictates queries

Going through the tabs:

General tab – put this in household mode (gifts display per family)

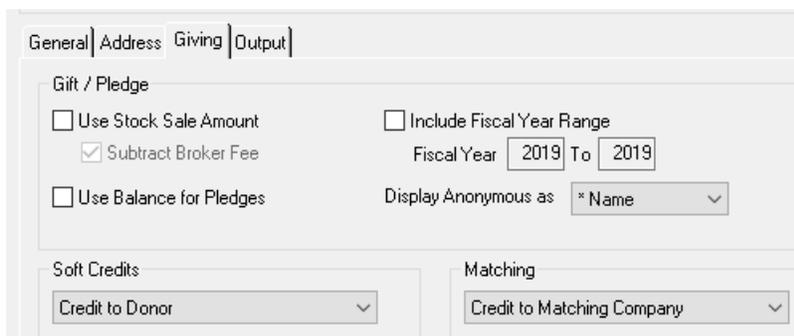


The screenshot shows the 'General' tab selected in a report interface. The 'Name' section includes a 'Format' dropdown set to 'As Saved', a 'Select' dropdown set to 'Combined Addressee', and an unchecked checkbox for 'Include Maiden Name'. The 'Other Options' section has three checked checkboxes: 'Include Lost Constituents', 'Include Deceased Constituents', and 'Include Inactive Constituents'. The 'Report Options' section has two radio buttons: 'Standard Mode' (unchecked) and 'Household Mode' (checked).

Address tab – do you want to see this? If not, click in the Include Primary and go to bottom to choose NONE.

Giving tab – Choose soft credits selections. Choose fiscal year range. You can uncheck the Include Fiscal Year Range if you want the report driven by the Select Giving to display query and the year is in it. If you want all giving for a fiscal year for everyone, then leave that checked and put 2021-2021 (or year you want).

Anonymous - how do you want these to display? *Name is most common.



The screenshot shows the 'Giving' tab selected in the report interface. The 'Gift / Pledge' section has four checkboxes: 'Use Stock Sale Amount' (unchecked), 'Include Fiscal Year Range' (unchecked), 'Subtract Broker Fee' (checked), and 'Use Balance for Pledges' (unchecked). The 'Fiscal Year' is set to '2019' and 'To' is set to '2019'. The 'Display Anonymous as' dropdown is set to '* Name'. The 'Soft Credits' section has a dropdown set to 'Credit to Donor'. The 'Matching' section has a dropdown set to 'Credit to Matching Company'.

Query: Select Giving to display query:

Click the magnifying glass to create a New query. Name the query.

Click on Add commands

In the Field to choose you will find many options. For this purposes, one is Honor/Memorial name IS EQUAL TO ... find the person. Apply / Close / Preview. You can choose other options as well to see how the report displays.

Condition Entry ×

Step 1 Select item to test ➔

- Gifts/Pledges
 - Amount
 - Anonymous Gift
 - Appeal Name
 - Appeal Year
 - Batch ID
 - Batch Description
- Campaigns/Funds
 - Date Received
 - Designation
 - Fiscal Month
 - Fiscal Year
 - Pledge Fiscal Year
 - General Ledger Batch ID
 - Gift Attribute
 - Honor Memorial Type
 - Honor Memorial Name**
 - Honor Memorial Description
 - Gift Comments
 - Gift Constituency
 - Gift Constituency Group
 - Gift Type (Gift, Payment, Pled)

Step 2 Select operator Honor Memorial Name
is One of ▼

Step 3 Select value(s)

Allow change at run time Ignore Case

Prompt

And/Or