A.D.

Tracking sources of information in Raiser's Edge

It is good practice to track where you get your information about constituents from. Doing so eliminates guesswork, helps with database maintenance and cleanup, and provides background for any constituent requests as to where you obtained their data from. There are various standard and custom places in The Raiser's Edge where you can track information source.

Standard places to store where you got data from

Consent Source
Address Info Source* - visible in NXT web view but not editable on new or existing addresses
Gift Aid Declaration Source* (UK only)
Prospect - Financial Info Information Source*
Prospect - Financial Info Ratings Source*

Places that require a little set up

Constituent Attributes* (Custom Fields in NXT web view)
Participant Attributes* - not in NXT web view
Education Attributes* - not in NXT web view
Address Attributes* - not in NXT web view
Individual Relationship Attributes* - not in NXT web view
Organization Relationship Attributes* - not in NXT web view
Account (Bank Relationship) Attributes* - not in NXT web view
Attribute Comments - on all the above; only Constituent Attribute comments are in NXT web view
Email Address Comments
Phone Number Comments
Link Comments
Notepad Author*
Notepad Title* - can be repurposed as Source as it can be made a lookup field
Media Author*
Media Title* - can be repurposed as Source as it can be made a lookup field

*Can be made required.

Getting users on board

- Explain why understanding the source of information is important to your organization.
- Keep lookup tables short and intuitive to avoid confusion and minimize errors.
- Make fields required, where possible, to minimize guesswork.
- Set up Default Sets for users to trigger when creating a new record in database view.
- Monitor gaps in data entry and remind users of what they need to do. To track field-level authorship you may be able to use a plugin like Zeidman Development's Audit Trail.