ABE CRM Constituent Add and Update Requests

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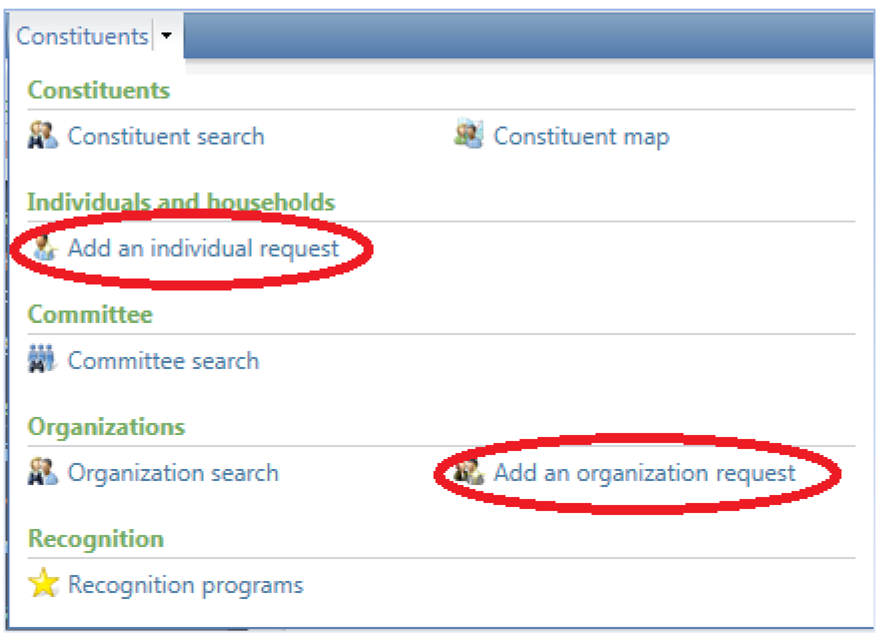
ABE CRM contains a great amount of data about our constituents. ABE CRM constituents can be donors, alumni, other individuals, or organizations that have some connection to UW–Madison or WFAA.

While WFAA has a wide range of tools and practices to maintain current data, we rely on all who work with our constituents to keep our data as up to date as possible. You may find that you have more current constituent data than what is reflected in ABE. Or perhaps a donor, alum, or organization is not represented at all. In such cases, you can supply this information directly to ABE CRM.

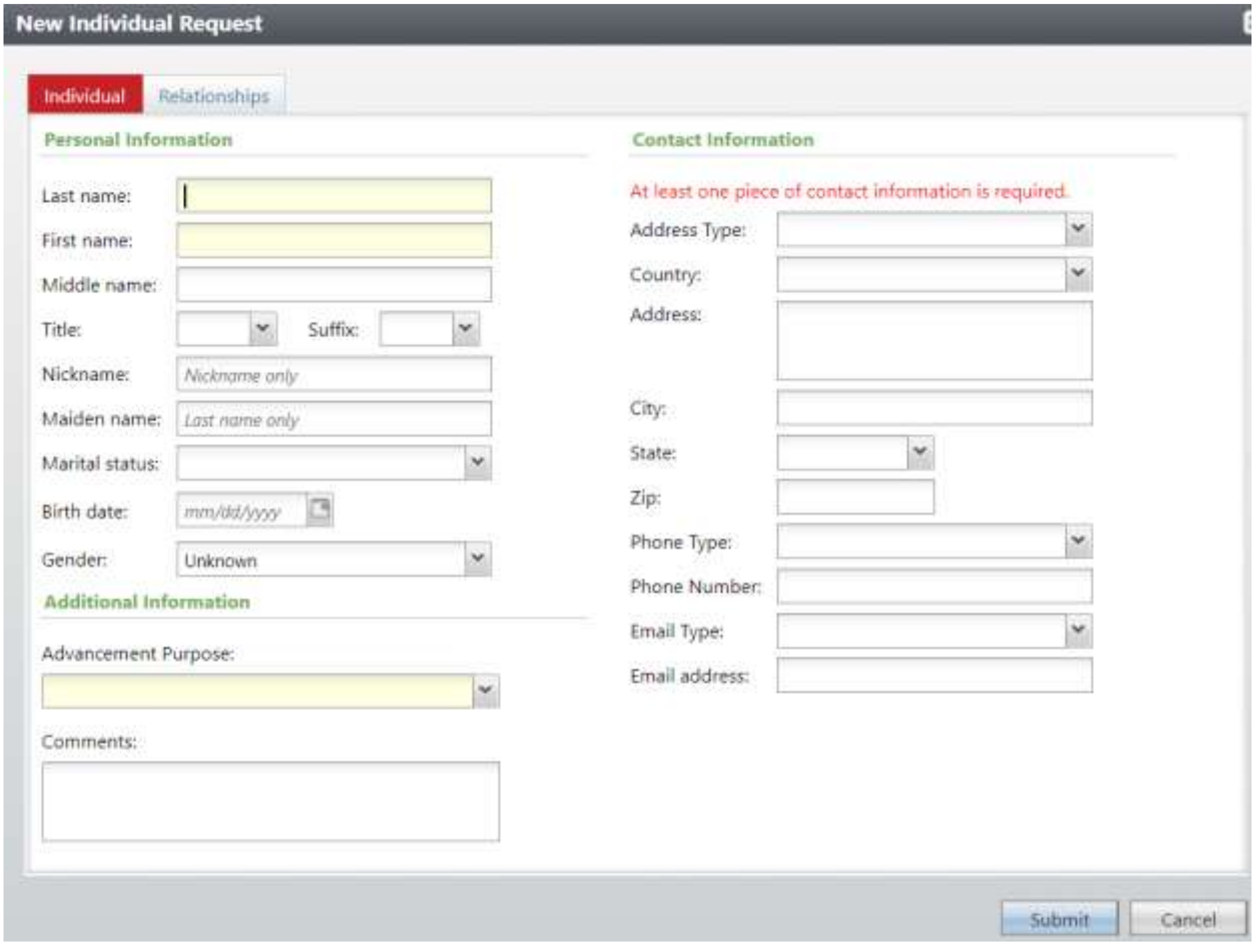
Adding a Constituent

Let's start with requesting the addition of an individual or organization to ABE CRM. Start by clicking on the Constituents menu (or menu drop-down) and selecting the appropriate item:



Add an Individual

After selecting **Add an individual request**, the request form appears:

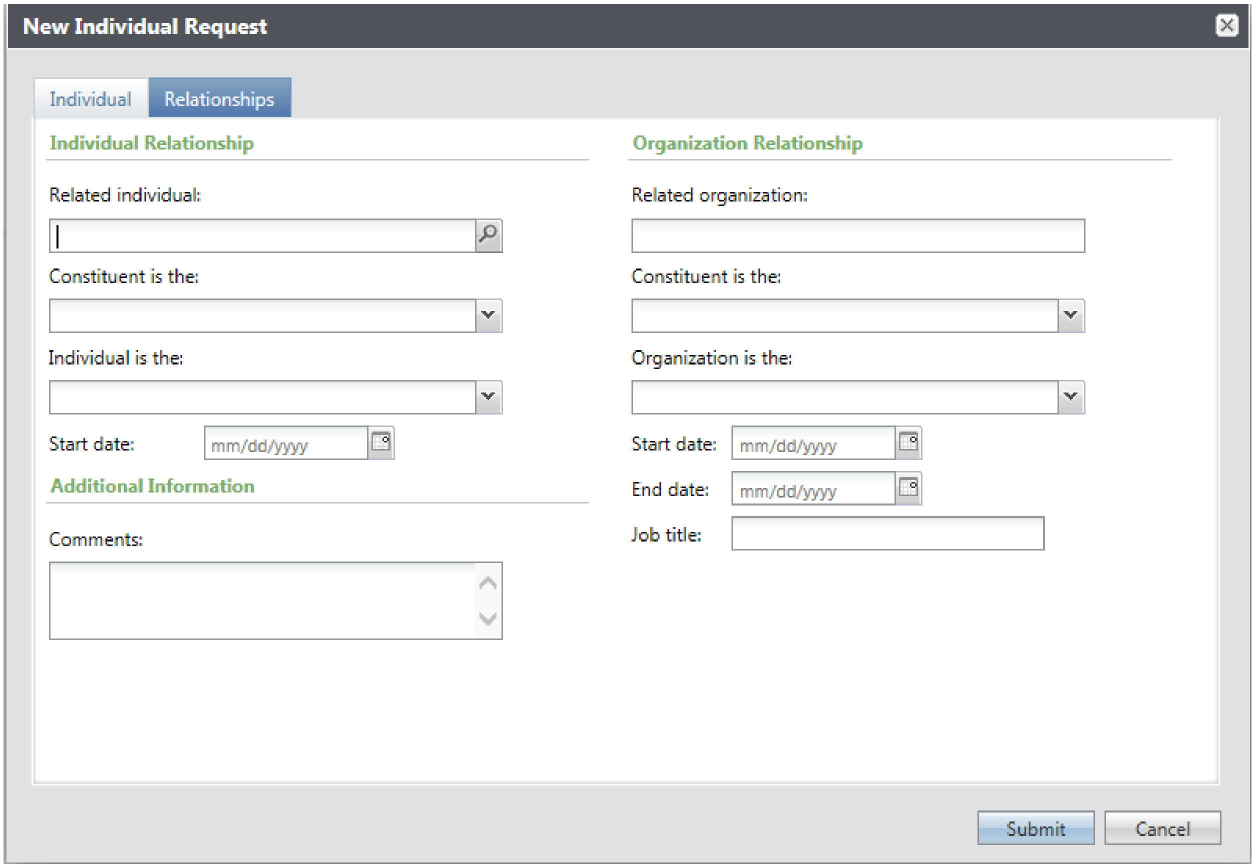


There are two tabs on the New Individual Request form. On the **Individual** tab:

- Required fields are indicated by their colored/shaded background.
- Advancement Purpose: This helps us understand what the record will be used for once it's created.
- In the right-side columns, you must supply at least one way to contact the constituent. It could be any contact type — address, phone, or email.
- When supplying a business address, include the name of the business in the first line of the **Address** field.
- If CANADA is selected in the **Country** field, the **State** and **Zip** field labels will change to **Province** and **Postal Code**, respectively. When entering information for other non-U.S. countries, supply the data as best as you can. When in doubt, add details in the **Comments** field.
- Use the **Comments** field for any additional information you can supply. (Be thorough — you cannot supply too much!)

This form will accept only one address, one phone, and one email. If you have more than one of a particular type (perhaps a home address *and* a business address), enter the additional information in the **Comments** field.

Here is the **Relationships** tab:



It is not required to provide information on this tab, but if you have something to share, please do so.

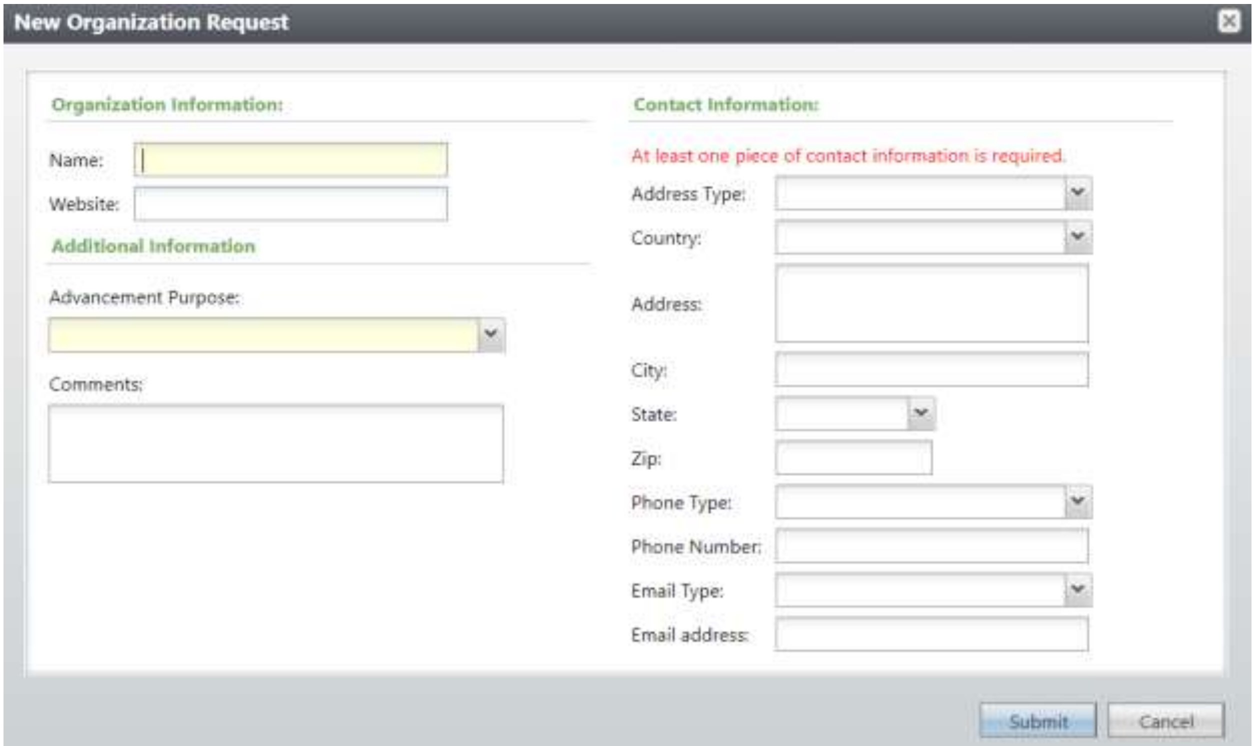
This form is used to indicate how the new individual is related to other ABE CRM constituents (individuals and/or organizations).

The **Related organization** field is an open text field.

Supply data in the **Start date** field only when entering a spousal/life partner relationship. The start date should indicate the marriage date. (If you do not know the marriage date, leave the field blank.)

Add an Organization

After selecting the **Add an organization request**, the request form appears:

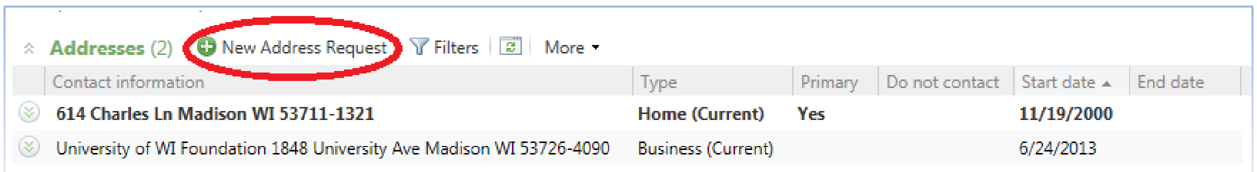


- Required fields are indicated by their colored/shaded background.
- Advancement Purpose: This helps us understand what the record will be used for once it's created.
- In the right-side columns, you must supply at least one way to contact the organization. It could be any contact type — address, phone, or email.
- If CANADA is selected in the **Country** field, the **State** and **Zip** field labels will change to **Province** and **Postal Code**, respectively. When entering information for other non-U.S. countries, supply the data as best as you can. When in doubt add details in the **Comments** field.
- Use the **Comments** field to supply any additional information. (Be thorough — you cannot supply too much!)
- This form will accept only one address, one phone, and one email. If you have more than one of a particular type, enter the additional information in the **Comments** field.

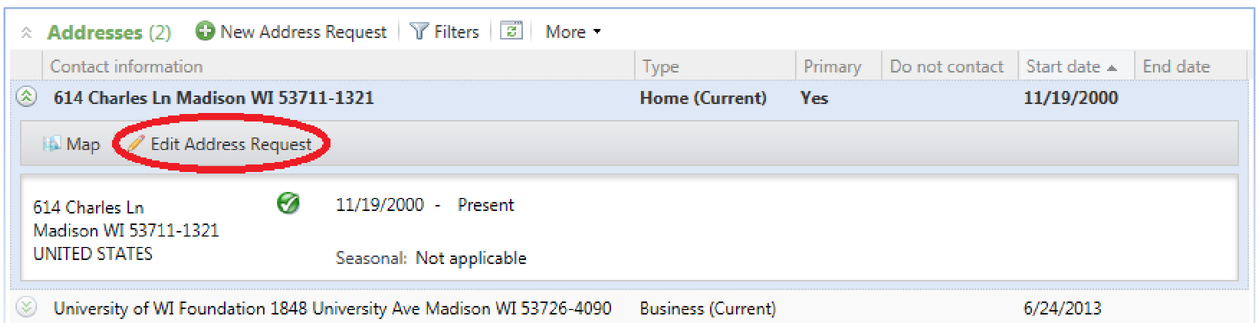
Updating Constituent Contact Information

ABE CRM stores four types of constituent contact information: address, phone, email, and social media. If you find that a constituent's contact information is incorrect or lacking, you can easily supply up-to-date information. Let's look at an example.

The **Addresses** section of the **Contact** tab displays the constituent's known addresses. The **New Address Request** button displays above the list:



If the icon next to the home address is clicked, here is what displays:



In the revealed section, the **Edit Address Request** button is shown.

Use these buttons to submit a request to add or modify address information.

Adding Contact Information vs. Editing Contact Information

You should request a <u>new</u> address when:

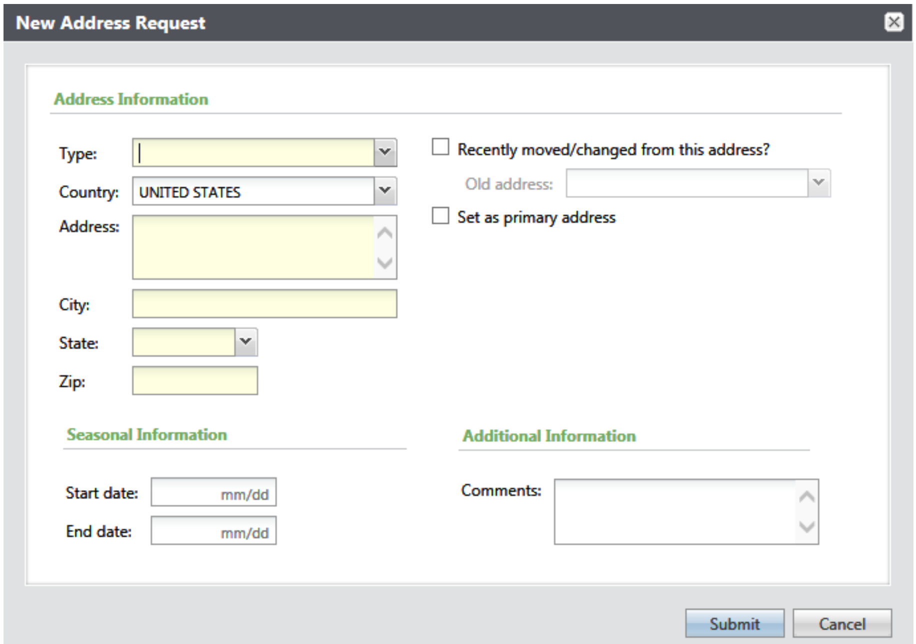
- The constituent has recently moved and their new home address is known.
- The constituent has another address that is not listed (such as a seasonal address).
- The constituent has a new business address. (In this case, <u>please</u> include the business name in the **Address** field!)

You should request that an address be <u>edited</u> when:

- There is an error in the constituent's address information (e.g., misspelled street name, incorrect house or zip code number, incorrect start/end date for a seasonal address).
- The address is no longer valid.
- The constituent's secondary address should be classified as their primary address.

Requesting a New Address

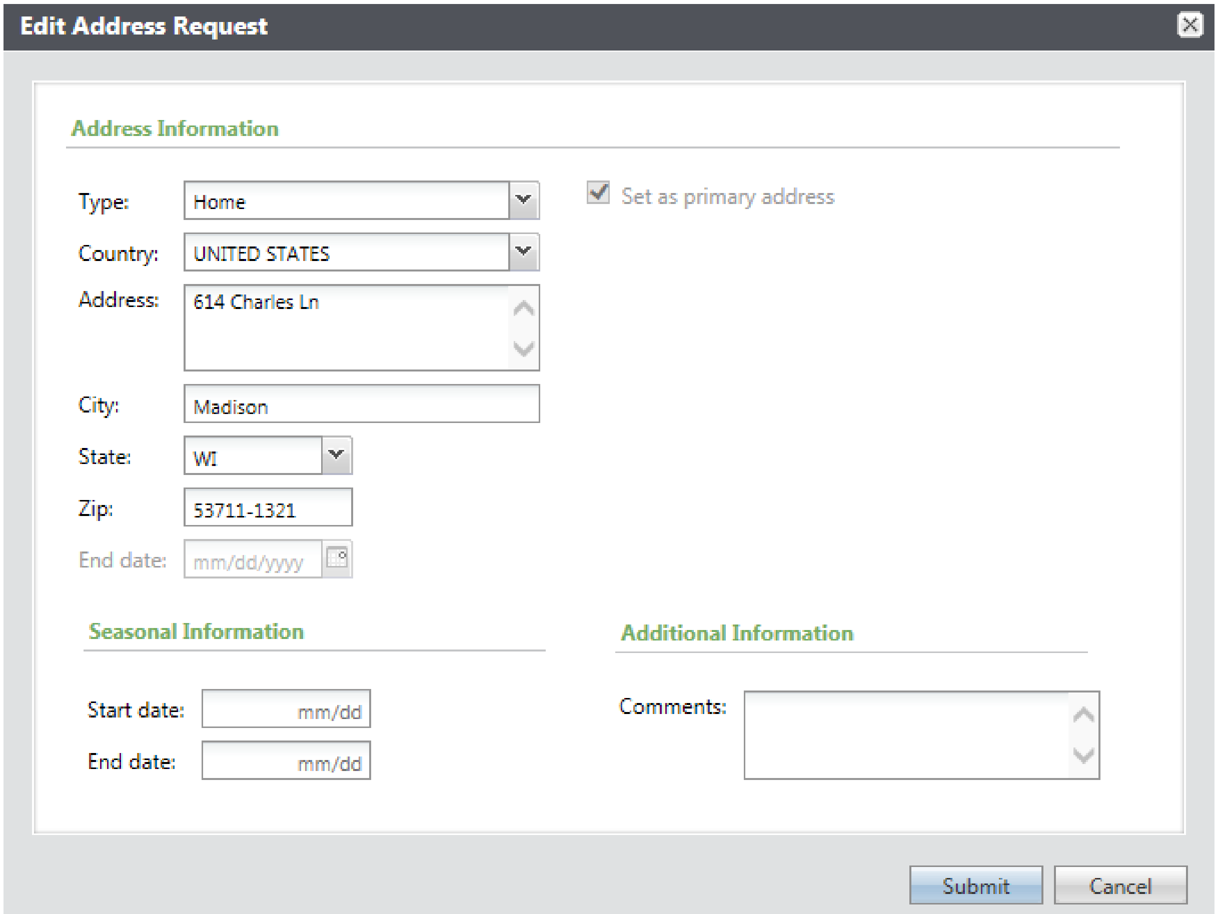
After clicking the **New Address Request** button, the New Address Request form displays:



- The fields having a colored/shaded background are required. Note that the **Type** field provides a drop-down list to choose from. If address type Other is chosen, use the **Comments** field to describe the address.
- When supplying a business address, an **Organization Name** field appears and is mandatory.
- If CANADA is selected in the **Country** field, the **State** and **Zip** field labels will change to **Province** and **Postal Code**, respectively. When entering information for other non-U.S. countries, supply the data as best as you can. When in doubt, add details in the **Comments** field. (Be thorough — you cannot supply too much information!)
- If you check the **Recently moved/changed from this address?** field, the **Old address** field will be required. This lets you tell us which “old” address is no longer valid.

Updating an Existing Address

After clicking the **Edit Address Request** button, the Edit Address Request form displays:



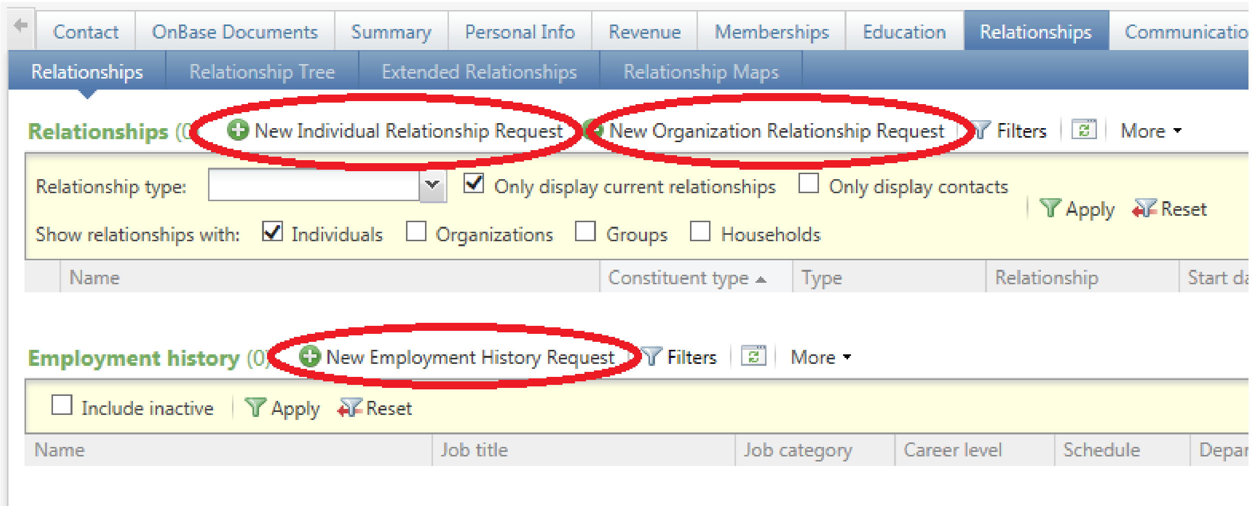
- The **Set as primary address** checkbox is only modifiable for non-primary addresses. In other words, you cannot "uncheck" a primary address, but you can change a non-primary address to the primary one.
- When supplying a business address, include the name of the business in the **Address** field.
- If the address is no longer valid, explain this within the **Comments** field. If you have an end date, you can provide it in the **Comments** field (for primary addresses) or enter it in the **End date** field (for non-primary addresses).

Updating Other Constituent Contact Information

The previous sections explain how to use ABE CRM to add or update constituent address information. Similar functionality is provided for the constituent's phone and email data. Social media data may be added via the "new request" button.

Updating an Individual Constituent's Relationship Information

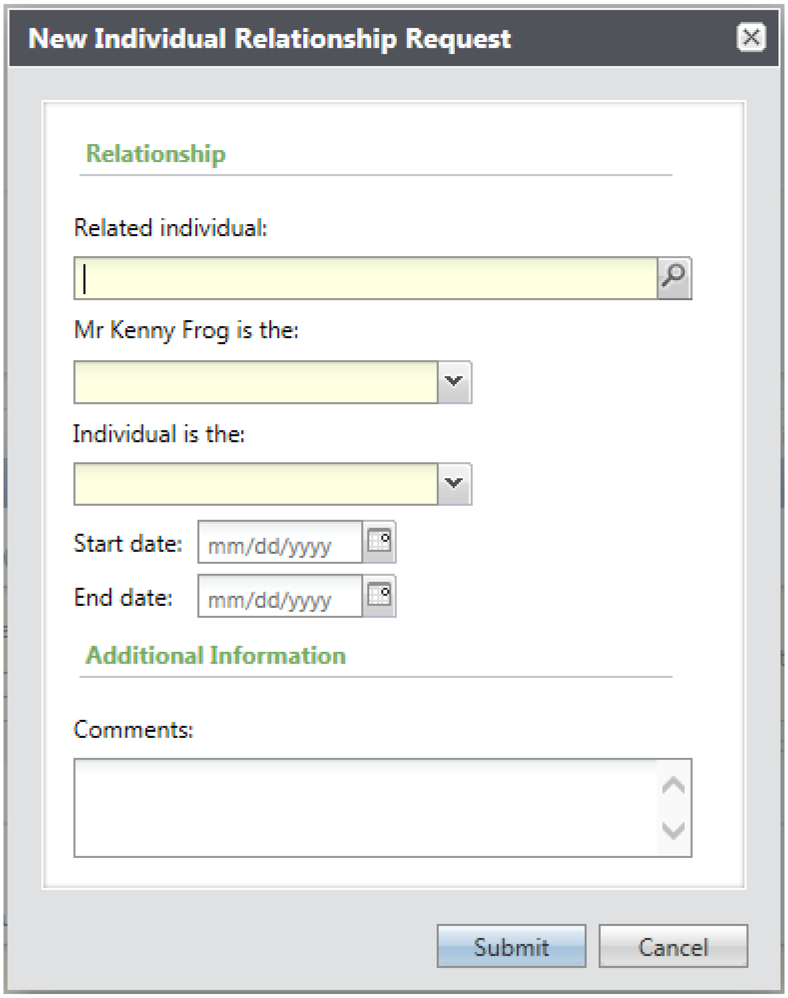
An individual's relationship information is displayed on the **Relationships** > **Relationships** tab. This tab provides three ways for you to supply relationship data:



- An **Individual Relationship** request is used to supply relationship information about the constituent and another ABE CRM constituent.
- An **Organization Relationship** request is used to indicate that the constituent has a new employer or has taken a board position.
- An **Employment History** request is used to provide updates to the constituent's employment information at their current employer (e.g., a change in position).

New Individual Relationship Request

Here is the **New Individual Relationship Request** form:



As with other forms, the fields having a colored/shaded background are required.

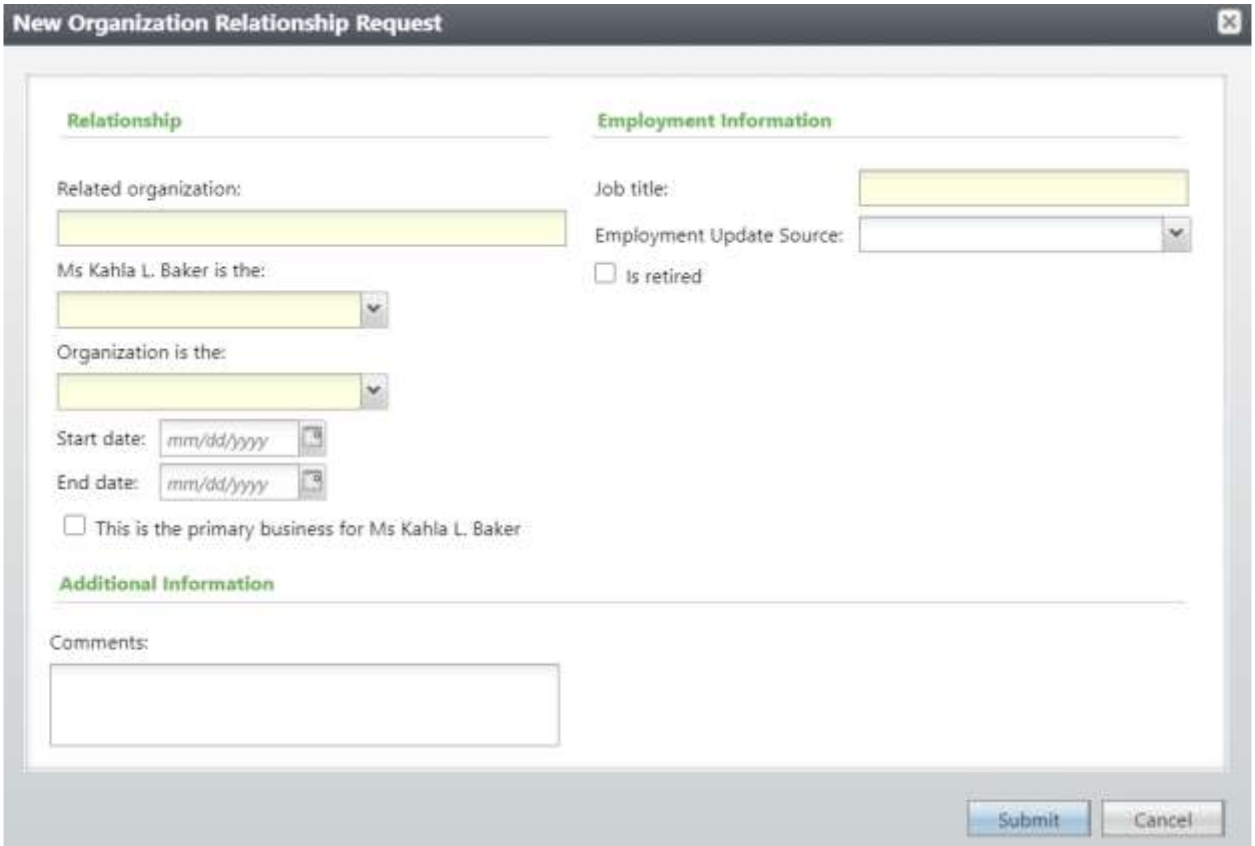
In the first field, use the "magnifying glass" icon to search for an existing ABE CRM constituent that has a relationship to the current constituent. Once the **Related individual** has been selected, use the next two fields to explain the relationship between them. When a selection is made in the first drop-down, a default relationship will populate in the next field.

The **Start** and **End date** fields are used to indicate the beginning and end of spousal or life partner relationships (if known).

Any additional information may be supplied in the **Comments** field.

New Organization Relationship Request

Here is the **New Organization Relationship Request** form:



As with other forms, the fields having a colored/shaded background are required.

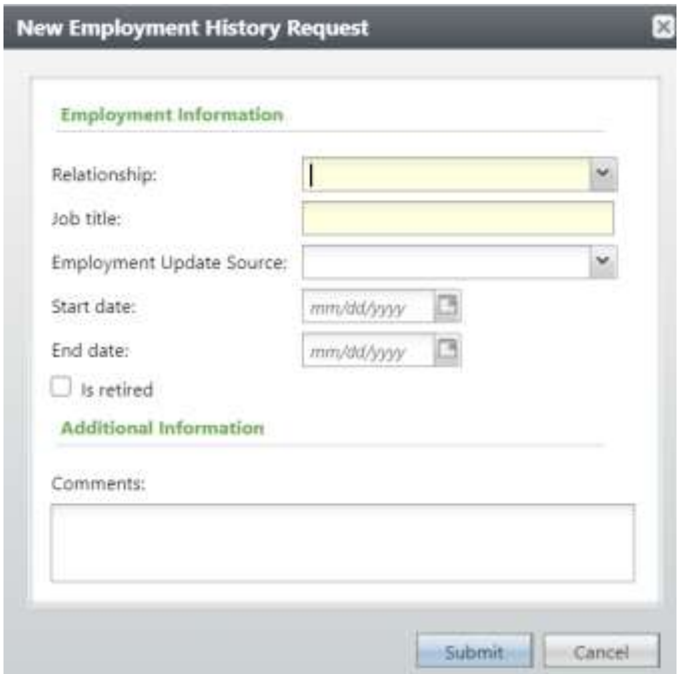
This form is used to indicate a change of employer or that the constituent has taken a board position within an organization.

Enter the name of the employer/organization in the first field, then select the appropriate data in the second field (*Employee* or *Board Member*).

The third field will default to a value that complements the second field. The **Start** and **End date** fields are used (if known) to indicate the beginning and end of employment or board membership at the organization.

New Employment History Request

Here is the **New Employment History Request** form:



As with other forms, the fields having a colored/shaded background are required.

This form is used to provide updates to the constituent's employment information at their current employer, like a change in position.

The first field will provide a selection of the constituent's employers. Enter their new job title in the second field. Use the remaining fields to supply additional information regarding their new position.

How Constituent Requests Are Processed

When you submit a request form, your information is reviewed by the WFAA Constituent Data Processing (CDP) team, which is responsible for updating constituent records. After the CDP team does its work, you will receive an email confirming that your request has been received. Once changes have been made, you will receive an email indicating that your changes have been approved. If the changes have been rejected, you will receive an explanation email.

The emails will indicate **BBDB Server Mailbox** as the sender.

Other Constituent Update Information

If you have constituent update information that does not fall into the categories discussed above, please send an email to the WFAA Help Center: **help@uwadvancement.org**.

Bulk Data Additions

If you have 10 or more constituents to add or update, place your list in an Excel spreadsheet and email the list to the Help Center (**help@uwadvancement.org**). A member of the Help Center will forward this information to the CDP team.