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# **How to Use This Document**

This guide is meant to ensure best practices for standardized data entry. The more standardized our data is, the better and more accurate our reporting will be! This should be considered a living document and should be updated frequently as the organization changes its procedures and needs.

Areas in brackets [like these] and tables or text boxes are meant to be personalized to fit the organization’s unique needs. [This paragraph may be deleted after customizing the document and before sharing with staff.]

If you have a question about entering data properly, please contact [add internal contact person and contact information here]

# **How to add a Constituent**



[Help Center Video](https://kbhelp.humanitru.com/knowledge/how-to-add-a-consituent): How to add a Constituent

## **Base Fields**

Base Fields are auto generated by Humanitru and cannot be changed, only edited. No additional Base Fields can be added (these are called Custom Fields). All Base Fields can be used and pulled in reports.

**ID**: This is the Constituent’s unique Humanitru Identification Number

**Name**: It is standard to combine a first and last name in this field. This is the name that will be used to search for a Constituent in the search bar. We recommend adding nicknames to this field (ex: William “Billy” Newman) to increase searchability.

**Email Salutation**: This Field is typically used to address a Constituent by name in an email and is generally considered an Informal Salutation. By default, Humanitru will add the First Name from the Base Field: Name. However, you can edit the Field to change it.

**Mailing Name**: This Field is typically used to address a Constituent on a mailing label and is generally considered a Formal Salutation. If a Constituent is part of a household, we recommend all members of the household share a Mailing Name (Ex: Megan and Billy Newman).

\*In a Mail Merge, you would pull fields for the following:

Mailing Label = Base Field: Mailing Name

Dear [Name] = Base Field: Email Salutation or Derived Field: First Name

\*To add additional Fields like Prefix, see the Custom Fields section below.

Custom Fields allow you to accomplish things like:

Dear [Prefix][Last Name] = Custom Field: Prefix + Base Field: Email Salutation or Derived Field: Last Name

You can also set up a separate Mailing Salutation Field that is separate from Mailing Name, which is typically used for a mailing label.

**Email**: This is considered the Constituent’s primary email address. To add Secondary (or more) email addresses, you will need to use Custom Fields (see below).

**Phone**: This is considered the Constituent’s primary phone number. To add Secondary (or more) phone numbers, you will need to use Custom Fields (see below). When using our Twilio integration, the system will automatically default to using this Field.

**Address**: This is considered the Constituent’s primary address. To add Secondary (or more) addresses, you will need to use Custom Fields (see below).

**Notes**: This field can be used for whatever you like. It is most commonly used for biographical notes.

| Base Field | Rules for Entry |
| --- | --- |
| ID | N/A (automatically assigned) |
| Name |  |
| Email Salutation |  |
| Mailing Name |  |
| Email |  |
| Phone |  |
| Address |  |
| Notes |  |

## **Custom Fields**

Custom Fields are added by your organization and are thus completely custom to your organization. We recommend you list all Custom Fields and their individual definitions below. You should also define how you want data entered into each field (Ex: Custom Field: Title should be entered as CEO and not Chief Executive Officer). All Custom Fields can be used and pulled in reports.



 [Help Center Video: How to add Custom Fields](https://kbhelp.humanitru.com/knowledge/how-to-add-a-custom-field)

| Custom Field | Rules for Entry |
| --- | --- |
| Title | No acronymsEx: CEO, please type out as Chief Executive Officer |
|  |  |
|  |  |

## **Derived Fields**

Derived Fields are auto generated by an integration with [SmartyStreets](https://www.smarty.com/products/us-address-verification?kw=smartystreets&cpn=19091887140&utm_term=smartystreets&utm_campaign=Search+%7C+Branded&utm_source=adwords&utm_medium=ppc&utm_content=144790796555&hsa_acc=9428111260&hsa_cam=858314393&hsa_grp=144790796555&hsa_ad=638331674856&hsa_src=g&hsa_tgt=kwd-333617534540&hsa_kw=smartystreets&hsa_mt=p&hsa_net=adwords&hsa_ver=3&gclid=CjwKCAiA9NGfBhBvEiwAq5vSy1bNctb-04eWmi0a3rC8XTYHuDuX_ydGQETfInsztk3fXB5rhiaHABoCksgQAvD_BwE). SmartyStreets reads Base Field: Name and Base Field: Address and breaks them into individual mailing components like First Name, Last Name, State and Zip Code. Derived Fields cannot be changed, edited, added, or deleted. All Derived Fields can be used and pulled in reports.

\*If nothing shows up in your Derived Fields, it means that this integration is not part of your subscription or it has not been turned on. Contact your Customer Success Representative for help.

First Name

Last Name

The First Name and Last Name fields are auto generated from Base Field: Name

Delivery Status: This information is auto generated from the Base Field: Address. You can learn more about the various Delivery Status definitions and address validation [here](https://www.smarty.com/articles/what-is-address-validation).

Delivery Line 1

Delivery Line 2

Last Delivery Line

City

State

Zip

Delivery Point Barcode

County

Congressional District

Time Zone

All of the above address related fields are auto generated from Base Field: Address.

**Which Fields are mandatory to fill out?**

Fields that are mandatory to be filled out when a new Constituent is added to the database:

* [Base Field 1]
* [Base Field 2]
* [Custom Field 1]
* [Custom Field 2]

**Which Fields are optional to fill out?**

Fields that are optional to be filled out when a new Constituent is added to the database:

* [Base Field 1]
* [Base Field 2]
* [Custom Field 1]
* [Custom Field 2]

# **Tags**

Tags are a way to Group or Label a Constituent. All Tag Groups and Tags can be used and pulled in reports. Some Tags are auto generated by Humanitru and by various integrations. These Tags will be denoted as [System Generated], meaning it came from Humanitru, or [Name of Integration Source], meaning it came from an integration like Mailchimp.

[Add a list of all of your Tag Groups and Tags and what they mean. We recommend using the chart structure below.]



[Video: How to download a list of all Tag Groups and Tags in your database](https://www.loom.com/share/e96e0004f88b46aeb819ea6cb1e28345)

| Tag Group | Tag | Definition of Tag / Rules for Use |
| --- | --- | --- |
| Constituent Type | Board Member | All active board members for FY 22-23 |
|  |  |  |
|  |  |  |
|  |  |  |

[Help Center Video: How to tag and untag Constituents](https://kbhelp.humanitru.com/knowledge/how-to-add-tags)

**Which Tags are Mandatory to add to a Constituent profile?**

* [Tag Group: Tag]
* [Tag Group: Tag]
* [Tag Group: Tag]

**Which Tags are Optional to add to a Constituent profile?**

* [Tag Group: Tag]
* [Tag Group: Tag]
* [Tag Group: Tag]

# **Relationships**

Adding a Relationship to a Constituent creates a link between two individual Constituent profiles. It does not automatically link any Constituent actions or contribute to any householding functionality. It is important to note that Relationships cannot be used in reporting. The primary purpose of the Relationships tool is for stewardship - to notate that two records have a relationship. Examples include Spouses, Primary Contact for an organization, Friend.



[Help Center Video: How to add and remove Relationships in a Constituent profile](https://www.loom.com/share/8d150af9bd86448aa900765ba08c334e)

[Add documentation for how your organization will utilize, or not utilize, Relationships. Some examples are: would you like Primary Contact to be a Custom Field or a Relationship? If a check comes in with 2 Constituent names, do you add a Relationship of Spouse?]



# **How to add Actions to Constituent profiles**



[Help Center Video: How to add an Action to a Constituent profile](https://kbhelp.humanitru.com/knowledge/how-to-manually-add-a-donation)

## **Action Types**

Humanitru has 11 different Action types:

Donation

Membership

RSVP

Check In

Volunteer Hour

Email

Phone Call

Text Message

Meeting

Letter

Note

## **Campaigns**

Campaigns are a way to categorize or label an Action. All Campaign Categories and Campaigns can be used and pulled in reports. Some Campaigns are auto generated by Humanitru and by various integrations. These Campaigns will be denoted as [System Generated], meaning it came from Humanitru, or [Name of Integration Source], meaning it came from an integration like Paypal.

[Add a list of all of your Campaign Categories and Campaigns and what they mean. We recommend using the chart structure below.]

| Campaign Category | Campaign | Definition of Tag / Rules for Use |
| --- | --- | --- |
| Gift Type | Check | If a donation comes via physical check, use this Campaign. In the notes section, include Check #: XXXX |
|  |  |  |
|  |  |  |

## **Special Rules: Donations**

[List any special rules for entering Donation actions. Consider FMV rules. This could include Grants, Sponsorships, Corporate Matching, etc.]

Mandatory Campaign Categories to add to Donations

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: Memberships**

[List any special rules for entering Membership actions. Consider FMV rules. This could include gifted memberships.]

Mandatory Campaign Categories to add to Memberships

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: RSVPs**

[List any special rules for entering RSVP actions. Consider FMV rules.] Please note that RSVP Actions typically come from events in Evergreen, Eventbrite, or ACME. We recommend adding RSVPs directly into those platforms.

Mandatory Campaign Categories to add to RSVPs

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: Check Ins**

[List any special rules for entering Check In actions.] Please note that Check In Actions typically come from checking in event attendees in Evergreen.

Mandatory Campaign Categories to add to Check Ins

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: Volunteer Hours**

[List any special rules for entering Volunteer Hour actions.] If your volunteers use Evergreen to register, we recommend entering all Volunteer Hours directly in Evergreen.

Mandatory Campaign Categories to add to Volunteer Hours

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: Touches**

\*Touches includes Emails, Phone Calls, Text Messages, Meetings ,and Letters

[List any special rules for entering Touch actions.]

Mandatory Campaign Categories to add to Touches

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

## **Special Rules: Notes**

[List any special rules for entering Note actions.]

Mandatory Campaign Categories to add to Notes

* [Campaign Category]
* [Campaign Category]
* [Campaign Category]

# **Tribute Gift Entry**

You have the option to add Tribute collections on your Humanitru Donation landing pages.



[Video: Donation Landing Page Tribute Functionality](https://2350645.fs1.hubspotusercontent-na1.net/hubfs/2350645/Pinecone%20Support%20Videos/Donation%20Page%20Tribute%20Options.mp4)

This means when a person makes a Tribute gift through one of your Humanitru landing pages, it will automatically have a *Donation Actions: In Memory Of* or *Donation Actions: In Honor Of* Campaign applied. In the Donation notes, you will see the following information:

Honoree Name: [Name]

Tribute Recipient: [Name]

Tribute Contact Info: [Information]

## **Mandatory Campaign Categories to add to Tribute Gifts**

* Donation Actions
* In Memory Of
* In Honor Of

[Add rules for manual tribute gift entry here.]

When manually entering a Tribute gift, we highly recommend following the above format in the Donation Action notes. In a report, you can search Donation notes for anything that comes after a “:”. If you match your manual entry to your automated entry, you ensure that you can always have an accurate Honoree Name column in your report. This also allows you to pull the Honoree Name column into a mail merge.

You may also consider adding additional Campaigns or Soft Crediting rules to Tribute gifts. These processes can be automated through Humanitru Smart Automation. For example, if you want all *Donation Actions: In Honor Of* with *Honoree Name: Megan Newman* to automatically have a *Fund: Megan Newman Scholarship* Campaign attached to them, Smart Automation can accomplish that. If you would like to consider Humanitru Smart Automation, please contact your Customer Success Representative.

#

# **Soft Credit Gift Entry**

The general rule of thumb is that the source of a gift is Hard Credited and anyone else associated with that gift is Soft Credited. Soft credits are never automated in Humanitru. If you would like to consider Soft Credit automation through Humanitru Smart Automation, please contact your Customer Success Representative.



[Video: How to add a Soft Credit to a Donation Action](https://kbhelp.humanitru.com/knowledge/how-to-add-a-soft-credit-1)

[Add rules for hard and soft credit gift entry here. You may want to consider special Campaigns for things like Corporate Matches.]

# **Pledge Gift Entry**

Humanitru considers a Pledge an Unverified Donation, typically with a date set in the future. There are 2 types of Pledges: a one time payment Pledge and a Pledge with a schedule.



[Help Center Video: How to create a Pledge](https://kbhelp.humanitru.com/knowledge/how-to-create-a-pledge)

All Pledges with a schedule automatically get assigned a *[System] Pledges w/ Payment Schedule: Pledge ID #####* Campaign.

It’s also important to note that all Pledges with a schedule can only be edited from the Pledge Created Note action.

If a Pledge is made via your Humanitru Donation Landing Page, use the following video to apply it to a pledge schedule.



[Help Center Video: How to apply an online donation to an existing pledge schedule](https://kbhelp.humanitru.com/knowledge/how-to-apply-an-online-donation-to-an-existing-pledge-schedule)

[Add rules for Pledge entry below.]



# **Special Use Cases**

[List any special use cases in entering data. For example, if you have a Foundation that sends a lump sum check but includes 50 soft credits, consider this a special use case and recommend using the above Soft Credit Gift Entry rules with the Batch Uploader. Other special use cases to mention could be how to handle bequests, grants, sponsorships, etc.]