

# Raiser's Edge Data Request Form

\*\* If this is a request from outside the University Advancement Division, please submit this form to Kris Phillips in University Advancement for approval, along with confidentiality form(s).

<b>Today's Date:</b>	<b>Date Needed:</b> (Please allow 2 weeks)
<b>Name:</b>	<b>Extension, Name and Dept of requester:</b>
<b>Kris Phillips signature:</b>	<b>Approval Date:</b>

**How will you use this output? (Please be as specific as possible):**

**Ex: Chattanooga Event List, Travel List, President's Holiday List**

**Please check all that apply.**

<input type="checkbox"/> Phone calls for planning visits	<input type="checkbox"/> Mail solicitation	<input type="checkbox"/> Prospecting/Research	<input type="checkbox"/> Email Solicitation
<input type="checkbox"/> Event Invitations	<input type="checkbox"/> Magazine	<input type="checkbox"/> Phone Solicitation	
<input type="checkbox"/> Other (please specify):			

**Query Selection Criteria (Please be as specific as possible):**

**(Ex. All 2003 Alumni and Non-Degreed Alumni, living in Montgomery County, TN) (Ex. Attribute = Tower Club, SGA)**

**Include Only:**  Individuals  Organizations  Both

**Exclusions to Apply:**

The following exclusions are customary: **Deceased, Inactive, No Valid Address, Do Not Contact**

<input type="checkbox"/> All Mail Contact	<input type="checkbox"/> Do Not Solicit
<input type="checkbox"/> All Mail Solicitation	<input type="checkbox"/> Confidential
<input type="checkbox"/> All Phone Contact	<input type="checkbox"/> Do Not Call until 2020
<input type="checkbox"/> All Phone Solicitation	<input type="checkbox"/> Only Call in the Fall
<input type="checkbox"/> All Email Contact	<input type="checkbox"/> Only Call in the Spring
<input type="checkbox"/> All Email Solicitation	<input type="checkbox"/> Only Call in the Spring
<input type="checkbox"/> Other (please specify):	

**Export Data Fields:****Head of Household Export Processing:**  Export only constituents marked "Head of Household" Export first constituent found  Export both constituents separately

Constituent ID - <b>always include</b>	<input type="checkbox"/> Birth Date
<input type="checkbox"/> Name (will export Individuals and Orgs in same column)	<input type="checkbox"/> Gender
<input type="checkbox"/> First Name	<input type="checkbox"/> Combined Mail Name (Ex – John and Jane Doe)
<input type="checkbox"/> Last Name	<input type="checkbox"/> Formal Address (Ex – Mr. & Mrs. John A Doe)
<input type="checkbox"/> Maiden Name	<input type="checkbox"/> Individual Addressee (Ex - John A Doe)
<input type="checkbox"/> Nickname	<input type="checkbox"/> Individual Salutation (Ex - John & Jane)
<input type="checkbox"/> "Class of" OR <input type="checkbox"/> Latest Grad Date	<input type="checkbox"/> Employer Name
<input type="checkbox"/> Constituency (ie: Alumni, Parent, Friend, etc...)	<input type="checkbox"/> Position
<input type="checkbox"/> Spouse Name	<input type="checkbox"/> Spouse Deceased Indicator
<input type="checkbox"/> Spouse "Class of" OR <input type="checkbox"/> Latest Grad Date	
<input type="checkbox"/> Spouse Constituency	<b>For Giving data, please specify which gift types to include:</b> <input type="checkbox"/> Cash types (Cash, In-Kind, All Pay-Cash, Stock, etc...) <input type="checkbox"/> Unpaid Pledge Balances <input type="checkbox"/> Planned Gifts (Bequest, Irrevocable Trust)
Email Address	
<input type="checkbox"/> Preferred Address	<input type="checkbox"/> Current FY Giving
<input type="checkbox"/> Phone (select type/s): <input type="checkbox"/> Home <input type="checkbox"/> Bus <input type="checkbox"/> Phone Append <input type="checkbox"/> Cell	<input type="checkbox"/> Last FY Giving
<input type="checkbox"/> Prospect Status	<input type="checkbox"/> Lifetime Giving
<input type="checkbox"/> Prospect Manager	<input type="checkbox"/> Last Gift Amount
<input type="checkbox"/> Prospect Ratings	<input type="checkbox"/> Last Gift Date
<input type="checkbox"/> Other (please specify):	
<b>Export File Format:</b>	
<input type="checkbox"/> Excel File	<input type="checkbox"/> Comma Separated Text File
<input type="checkbox"/> Counts/ Totals Only	<input type="checkbox"/> Other (please specify):

**For Programmer Use Only:**

Query/Export Name:

Set Up By:

Date:

Please complete this form and e-mail it to [wheelerl@apsu.edu](mailto:wheelerl@apsu.edu) for processing.