

How do I get help?

Log in directly to Ali CRM at ali.nufoundation.org

Use foundation credentials. Reminder: passwords expire every 90 days. 2*

Register and use the self-serve password reset service at <https://passwordreset.nufoundation.org>

Find training and reference materials at www.nufoundation.org/ali

Report an issue or get help by emailing servicedesk@nufoundation.org

Add or update constituent or committee information by emailing biographicalrecords@nufoundation.org

Have a list (called a “**selection**” in Ali CRM) built by contacting your alumni association.

Other Reminders: 1. Open multiple browser windows to work in multiple screens at the same time. 2. Data updates in real-time so any data downloaded may be outdated. 3. Google Chrome is the preferred web browser.

Constituent Records and Searches

What kinds of records can I see in Ali CRM? A*

There are four main types of constituent records in Ali CRM:



1. Individual constituent – individuals, such as donors, alumni, and friends



2. Household – data aggregate providing an overall view of two linked spouse constituent records. Because it’s an aggregate view only, information is *never* written to this record type.



3. Organization – corporations, foundations, and government entities that are able to donate collectively as a group.

Tip: use **Organization search** found under the **Constituents** functional area to view the primary organization records on which activity is primarily documented. Under **Show Advanced Search Options** check:

Only search primary organizations



4. Committee – associated individuals or organizations. Able to plan events, set financial fundraising goals, and non-financial committee goals. Members have roles with start and end dates. **Tip:** write one interaction to a committee record, then enter Participants to also write the interaction to individual constituent records.

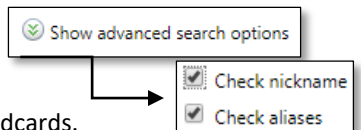
For more information refer to the guide called **Constituent Groups: When and How to Track Constituent Groups** on the Ali Training and References site.

* See page 3

How do I search for a constituent?

1. Set top quick search bar to Constituents Name or lookup ID 1
2. Type in constituent’s full name or Lookup ID
 - Or: with search bar empty, click to launch the **Advanced Search**

• Best practice:



• Use search wildcards.

? Replaces one character and/or

* replaces a group of characters.

For example, **pe?ers*** finds: Peders, Peters, Pederson/en, Petersen/on

! Filter settings and search settings are “sticky” in Ali! Parameters “stick” until changed or reset.

- Consider applying a **Constituency** filter to narrow search results, such as: Alumnus, Board member, Event Registrant, Fundraiser, Donor, Staff, etc.
- **Include fuzzy search on name** is used for “sounds like.” When searching for a name with special characters, such as é, try using * in place of the é.

Tip: in the **Constituent Search** form enter full name (first + last) in box #1. If separating first and last names, use boxes #2 & 3.

Name/Lookup ID:	1
Last/Org/Group name:	2
First name:	3

Interactions

When should I add an Interaction?

When an alumni, donor or friend of the university:

- Attends or gives a campus tour
- Is a guest speaker at a class
- Meets or volunteers with campus partners
- Is mailed a personalized letter or emailed

What do I need to know to enter an Interaction?

- **Comments** should be “newspaper ready”
- Never include sensitive or private information
- Keep comments factual. Refrain from opinions.
- Best practice: enter interactions within 10 days to foster collaborative efforts across units

How Do I Add an Interaction? B*

Navigate to the constituent record. If the interaction is with a married couple, choose either spouse to add the interaction and then fill in the other spouse as a **Participant** on the interaction (if applicable.) On the **Documentation & Interactions** summary tile, click + Interaction and fill in the required and optional fields. Yellow-filled fields are required.

Status: usually choose **Completed**. **Canceled** is for no-shows or plans fell through. **Declined** means the constituent did not agree to meet.

Owner: the primary university or foundation staff responsible for this interaction. When entering interactions for others ensure the correct name is displayed here before saving, as the system will default to the present user.

Tip: if multiple university or foundation staff are part of the interaction, an attribute must be added after saving the interaction. Reopen the interaction and add an attribute from the **Attributes** tab. In the **Category** field select **Additional Fundraiser**. Type the name of the staff member in the **Value** field. Repeat to add additional staff.



Category: usually choose **Contact**, **NAA**, **UNOAA**, or **UNMCAA**.

Sub-category: most common sub-categories include

- **Personally Scheduled Meeting** – prearranged, substantive
- **Face to Face** – brief, not pre-arranged
- **Direct Communication** – to/with constituent
- **Indirect Communication** – about/regarding constituent

Date: F3 (function key) inserts today’s date

Contact method: **meeting, electronic, mail, phone, or event**

Comments: concise description of the interaction’s significance, purpose, outcome, and next steps.

Tip: If copying and pasting text from an email, click inside **Comments** box, then *right-click* and **Paste as plain text**.

Site: hierarchy of campuses, institutes, colleges, and departments. Linking an interaction to a **Site** allows a query later to determine activity related to a specific unit. Please refer to the explanation of **Sites** on page 4 of this guide for important information.

Participants: individuals listed here are generally *not* university nor foundation representatives. Rather, **Participants** are influencers involved in the interaction from the perspective of the *constituent* such as a spouse, financial or legal advisor, or an adult child. Any constituent listed as a **Participant** will have the interaction mirrored to their constituent record. Two buttons appear at the end of the **Participants** line once you click inside the top bar. ▼ 🔍 The down-facing arrow is a “quick-pick list” of relationships linked to the constituent. The magnifying glass launches a search window, allowing the user to browse to select any Ali CRM constituent.

* See page 3

Anatomy of a Constituent Record

Click a constituency at the top or even a summary tile's blue title – and the related tab and/or sub-tab will surface below to help you find the details you need, fast.

- | | | | |
|--|----------------------------|----------------------|--|
| 1 Quick Search bar | 6 Summary tile title | 11 Recently accessed | A Visual Anchor
look here first; icon changes per record type |
| 2 Change password | 7 Summary tiles | 12 Recent searches | B Add an Interaction
see page 2 |
| 3 Functional areas; Navigation bar | 8 Tabs; Sub-tabs (details) | 13 Shortcuts | |
| 4 Help Blackbaud's built-in help; online searchable resources | 9 Expand/Collapse | 14 Write a Letter | |
| 5 IMPORTANT! Constituencies describe the person's relationship to the Univ. of Nebraska. Why is this person in Ali? | 10 Explorer bar | 15 Customize tiles | |
| | | 16 17 Show less/more | |

Refer online to the printable **Individual Constituent Record Guide** for a list of tabs and detailed contents found on each tab: www.bitly.com/TabsOnAConstituentRecord

Constituent Communications


How do I Write a Letter to a Constituent? 14

- **Write a Letter** functionality is available at the top left edge of any constituent record. By using this process, the constituent contact information and standard letter format are prefilled in a Microsoft Word document and the interaction is created in Ali CRM all at once.
 - Refer to the Fundamentals Manual, Communications appendix for step-by-step instructions.
- Tip:** If a **Custom Addressee** and/or **Custom Salutation** is available, please always choose this option as the constituent has expressed a preference which should be honored.

Emailing Constituents: What you need to know ★

- Campus partners may email constituents that they already have an affiliation with in a personalized direct communication from their personal email account as needed for advancement purposes and record it as an interaction in Ali CRM.
- *All mass email communications must be coordinated with your campus's alumni association.* Email addresses should not be documented outside of Ali CRM as they are protected information.

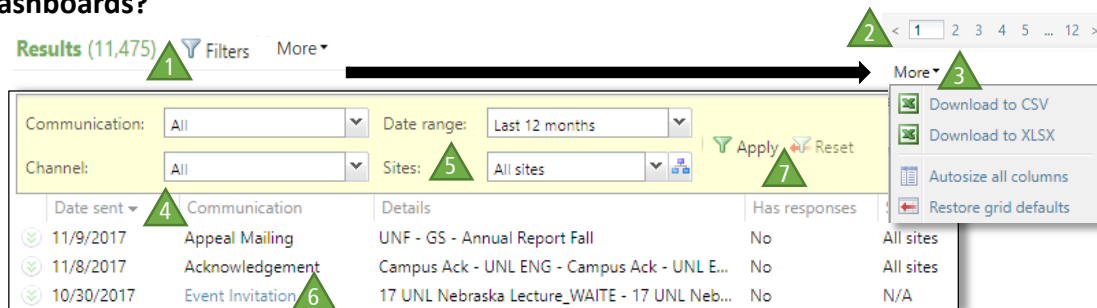
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- Customize the **Summary Tiles** that display on constituent records with the **Customize tiles** button.  15
Best practice is to add: **Education** and **Prospect Status** tiles.
- Rearrange tabs and/or sub-tabs so the information most critical to you becomes the default view for you. Drag and drop to reorder side to side. The tab farthest LEFT becomes the default tab on that record type.
- Add a **Shortcut** (favorite) by hovering over select hyperlinks *without* clicking, when a menu appears click **Add to Shortcuts**. Manage or Delete shortcuts using the link at the top of the shortcuts list. 13

How do I navigate Ali dashboards?

1 7 You may need to click the **Filters** button initially to expand/reveal the yellow filter settings pane. To use: choose filter parameter(s), then click **Apply**. These filter settings will “stick” until you change or **Reset** them. The **number in parentheses** indicates the quantity of records found which match your search parameters.

2 **Data in Ali stretches across multiple screens:** notice you may have many pages of results to consider rather than what is immediately seen by scrolling down.

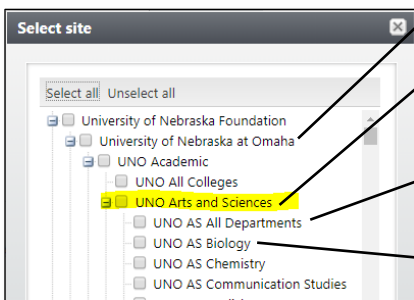


- 3 Where available, the **More** button always offers ability to download the data list located in the pane directly below the button.
- 4 Click any **gray column heading** in a data list to sort all data (**even across multiple pages**) by that category type; a second click toggles to sort in reverse order. The small black arrow indicates how contents are being sorted.
- 5 The **Sites** field refers to the hierarchy of locations with which information may be associated: [Foundation](#) | [Campuses or Institutes](#) | [Colleges](#) | [Departments](#)

See the *Site Records & Site Hierarchy* guide for additional explanation. A helpful list of acronyms and official abbreviations is available in the *Naming Conventions & Standards* guide.

6 **Hyperlinks in blue** take you to the record affiliated with that data point. In this case, you'll jump directly to the event invitation for the 17 UNL Nebraska Lecture.

It is important to select the correct Site! Drill down examples include:



- **University of Nebraska at Omaha** – highest tier in UNO hierarchy
- **UNO Arts and Sciences** is the *inclusive* “upper tier” of this college and truly includes ALL departments in the college; **this is what most users will want to select** if adding Site information to an interaction record *whereas*:
- **UNO AS All Departments** is used during funds management, for example in NUFFO, and limits the results to funds intended to benefit *all* departments within the college (despite the Site name containing the word *All*, it is exclusionary)
- **UNO AS Biology** is a drill-down level of detail, specific to a department within a college

How do I extract data from Ali CRM?

- Reports are accessible in multiple places within Ali CRM. Many of the functional areas in the blue navigation bar across the top of the screen offer reporting specific to that area.
 - Click on the **Events** functional area, for example, to view the advancement events calendar and some events-related reports near the bottom of the window.
 - The **Deceased Constituents Report** is located under the **Constituents** functional area. Note the date range to run this report is *when the foundation was notified* about the passing of the constituent.
- Within the **Analysis** functional area is located the **Information library** task group, home of **Smart query** functionality. Smart queries provide users a self-service report where the user enters certain parameters within a pre-built query skeleton, then runs the report based on chosen criteria and frequency. Of particular interest to university users may be the Smart Query **Alumni by Campus, College & Grad Year**. Please refer to the online guide by the same name for instructions.