



Bio Update

TRAINING MANUAL for University Partners

Includes:

- Understand the Bio Update feature
- Bio Update Add Process
- Bio Update Edit Process

Version 1.0

September 2025



Ali CRM

The software referred to as **Ali** (pronounced al-ee) CRM derives its name from the Greek word **Aletheia** (pronounced al-uh-thee-uh), the Greek goddess of truth. The intention is to ensure Ali CRM is the single source of truth about advancement activities that benefit the University of Nebraska.



Ali CRM gives those who work in advancement, which includes efforts such as **fundraising, alumni relations, marketing and communication**, the ability to manage relationships and interactions with alumni, donors and friends. Ali CRM has many features to help users navigate, access and share information, and it provides a 360-degree view of the university's advancement constituents, allowing users to provide a customized, consistent experience for each alumnus or friend of the university.

NU Foundation Funds Online

NUFFO (pronounced new-foe) is part of Ali CRM. The NUFFO portal provides fund and gift information to authorized users. The foundation cannot share specific gift amounts for donors in Ali CRM. Why? The university is subject to public records laws, and providing access to this information via the Ali CRM database or other paper or electronic records makes gift information subject to disclosure by the university as a public record.



Ali CRM + NUFFO affiliated partners:

- the University of Nebraska
- the university alumni associations
- the University of Nebraska Foundation
- Nebraska Medicine

Ali CRM is the single source of truth for supporters of the University of Nebraska.

BIO UPDATE

FOR UNIVERSITY PARTNERS

TABLE OF CONTENTS

BIO UPDATE ADD PROCESS.....	4
Add a New Address.....	4
Add a New Phone Number	5
Add a New Email Address	6
BIO UPDATE EDIT PROCESS	7
Update an Address to Invalid (do not mail)	7
Update a Nonprimary Address to Primary.....	8
Update a Phone Number to Invalid (do not call)	9
Update a Nonprimary Phone to Primary.....	9
Update an Email Address to Invalid (do not email)	10
Update a Nonprimary Email Address to Primary.....	11

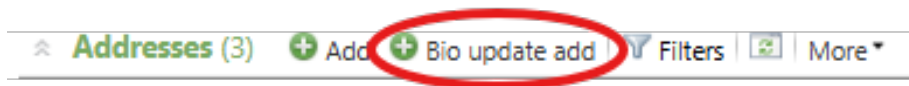
BIO UPDATE

The bio update feature is available for each contact type in a constituent record, allowing users to add or invalidate constituent contact information directly within Ali CRM.

BIO UPDATE ADD PROCESS

The **Bio Update Add** option should only be used to add new contact information.

Add a New Address



1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Addresses** action bar, click **Bio update add**.
4. Complete the fields and options in the **Add an address** window.
 - a. Select the **Type**.
 - b. Select the **Country** (automatically United States, change if needed).
 - c. Enter the **Address lines, City, State, Zip**.
 - d. Select **Validate** to add the +4 to the zip.
 - e. Enter the **Start date** (date of entry or date valid).
 - f. If this is a seasonal address, enter the date and month when the constituent uses the address.
 - g. If the constituent changed to the address from an address currently on the constituent record, check **Recently moved/changed from this address?**
 - i. In the **Old address** field, select the former address.
 - ii. Note: The program automatically will mark the selected address as a former address when Biographical Records (BAR) approves the update.
 - h. If the constituent is married, the **Copy address to household and members** will be checked.
 - i. If the address change applies to both, make sure to update each person's record separately.

- ii. If the change only applies to one person, uncheck the **Copy address to household and members** box to avoid updating the
 - iii. If the constituent is widowed, be sure to uncheck the box, otherwise it will create a new, valid address on the deceased spouse's record.
 - i. Select the **Information Source** — who the source of information is (constituent, Internal Staff — enter “per [name]” in the **Comments** section).
5. Click **Save**.
 6. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Address Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Add a New Phone Number



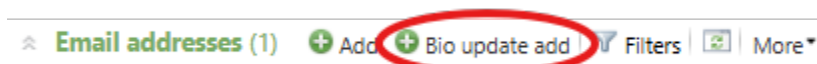
1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Phone numbers** action bar, click **Bio update add**.
4. Complete the fields and options in the **Add a phone number** window.
 - a. Select the phone **Type** (if unknown, default to **Cell**).
 - b. Enter the phone **Number**.
 - c. Enter the **Start date** (today's date).
 - d. If the phone number is for a seasonal address, add the seasonal dates to this phone number under **Seasonal information**.
 - e. If the phone number is the preferred phone number, check **Set as primary phone number**.
 - i. Only one number can be marked as primary. If you enter multiple phone numbers, be sure to select one as the primary.
 - f. If the constituent has a spouse, uncheck **Copy phone number to household and members**, unless you know this is shared by both spouses.
 - i. If the constituent is widowed, be sure to uncheck the box, otherwise it will create a new, valid phone on the deceased spouse's record.

- g. Select the **Information source** – who the source of information is (constituent, internal staff – enter “per [name]” in the **Comments** section).
5. Click **Save**.
6. Under the constituent’s name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Phone Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Add a New Email Address



1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Email addresses** action bar, click **Bio update add**.
4. Complete the fields and options in the **Add an email address** window.
 - a. Select the **Type**.
 - b. Enter the **Email address**.
 - c. Enter the **Start date** (today’s date).
 - d. If the constituent has a spouse, uncheck **Copy email address to household and members**, unless you know this is shared by both spouses.
 - i. If the constituent is widowed, be sure to uncheck the box, otherwise it will create a new, valid email address on the deceased spouse’s record.
 - e. Select the **Information source** – who the source of information is (constituent, internal staff – enter “per [name]” in the **Comments** section).
5. Click **Save**.
6. Under the constituent’s name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Email Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

BIO UPDATE EDIT PROCESS

The **Bio Update Edit** option should only be used in the following two scenarios:

- **To invalidate incorrect contact information**

Use this function when existing contact details are inaccurate. *This function should not be used to correct or add information.* If there are missing contact details, typographical errors or transposed numbers, use the **Bio Update Add** process to ensure historical data is preserved.

- **To designate a new primary contact detail**

Use this function to change a nonprimary address, phone number or email to the primary designation.

Update an Address to Invalid (do not mail)

The screenshot shows the 'Addresses' section of the Ali CRM interface. At the top, there is a toolbar with 'Addresses (3)', 'Add', 'Bio update add', 'Filters', and 'More'. Below this is a table with columns 'Contact information', 'Type', and 'Primary'. The first row shows the address '15334 Antler Creek Dr San Antonio, TX 78248-...' with type 'Home (Current)' and primary status 'Yes'. Below the table, there is a row of action buttons: 'Bio update edit' (highlighted with a red circle), 'Edit', 'Delete', 'Write letter from template', 'Write a letter', and 'Map'. Below the buttons, the address details are displayed: '15334 Antler Creek Dr', 'San Antonio, TX 78248-2014', 'United States'. To the right of the address, there is a green checkmark, the date '4/2/2009 - Present', and the text 'Information source: External Source'. At the bottom, it says 'Seasonal: Not applicable'.

1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Addresses** action bar, click the **Double Chevron** to edit the address.
 - a. Click **Bio update edit**.
 - b. Check the **Do not send mail to this address**.
 - c. Select the **Reason**.
 - d. If the address is not primary, enter the **End date** (today's date).
 - i. Ali CRM does not allow for a primary address to have an end date.
 - e. You can add a comment in the **Comments** section.
4. Click **Save**.

5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.

 Notifications: "BioUpdate_Pending Address Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Update a Nonprimary Address to Primary

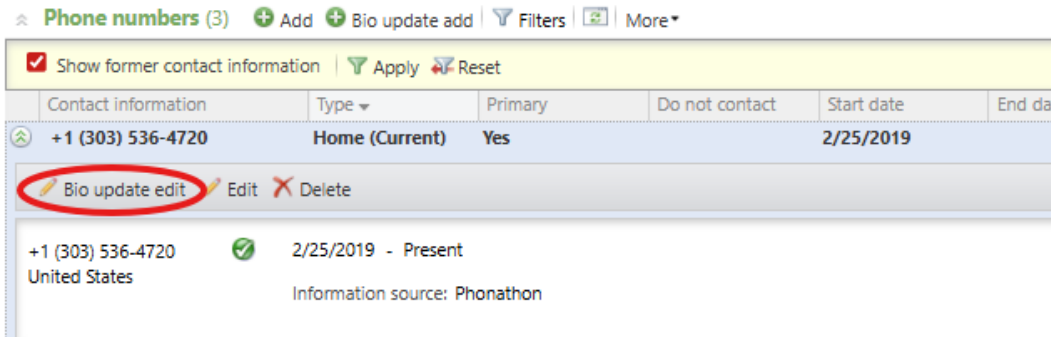
1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Addresses** action bar, click the **Double Chevron** on the address you want to make primary.
 - a. Click **Bio update edit**.
 - b. Select **Set as primary address**.
 - i. This will only change the constituent's record. If they are married, it will *not* automatically change their spouse's.
 - c. Add a comment in the **Comments** section.
4. Click **Save**.
5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.

 Notifications: "BioUpdate_Pending Address Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Update a Phone Number to Invalid (do not call)



1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Phone numbers** action bar, click the **Double Chevron** to edit the phone number.
 - a. Click **Bio update edit**.
 - b. Check **Do not call this phone number**.
 - c. If the phone number is not primary, enter the **End date** (today's date).
 - i. Ali CRM does not allow for a primary phone number to have an end date.
 - d. You can add a comment in the **Comments** section.
4. Click **Save**.
5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Phone Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Update a Nonprimary Phone to Primary

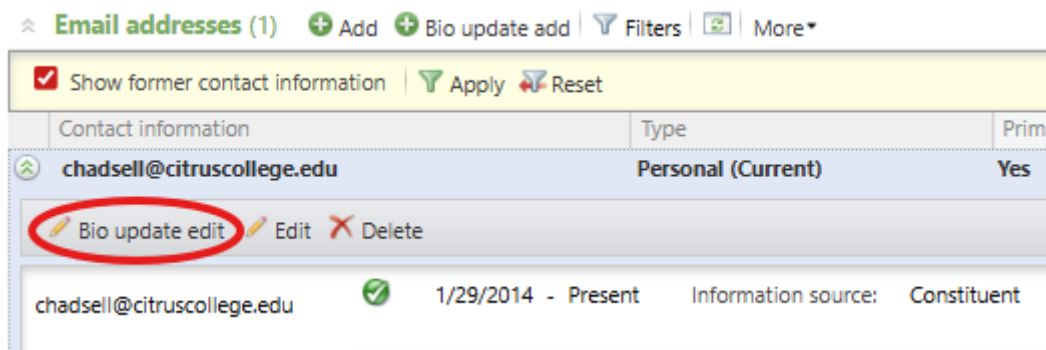
1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Phone numbers** action bar, click the **Double Chevron** on the phone you want to make primary.
 - a. Click **Bio update edit**.
 - b. Select **Set as primary phone number**.
 - i. This will only change the constituent's record. If they are married, it will *not* automatically change their spouse's.

- c. Add a comment in the **Comments** section.
4. Click **Save**.
5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Phone Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Update an Email Address to Invalid (do not email)



1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Email addresses** action bar, click the **Double Chevron** to edit the email address.
 - a. Click **Bio update edit**.
 - b. Check **Do not send email to this address**.
 - c. Select the **Reason**.
 - d. If the email address is not primary, enter the **End date** (today's date).
 - i. Ali CRM does not allow for a primary email address to have an end date.
 - e. You can add a comment in the **Comments** section.
4. Click **Save**.
5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.  Notifications: "BioUpdate_Pending Email Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.

Update a Nonprimary Email Address to Primary

1. Open the constituent record.
2. Select the **Contact** tab.
3. On the **Email addresses** action bar, click the **Double Chevron** on the email you want to make primary.
 - a. Click **Bio update edit**.
 - b. Select **Set as primary email address**.
 - i. This will only change the constituent's record. If they are married, it will *not* automatically change their spouse's.
 - c. Add a comment in the **Comments** section.
4. Click **Save**.
5. Under the constituent's name at the top will be a yellow notification, letting you know the update went through.

a.

 Notifications: "BioUpdate_Pending Email Change". Click here for more information.

If a change was submitted in error, email the Biographical Records team, biographicalrecords@nufoundation.org, to cancel the submitted change.