

# Find--Matic

## CONTENTS

OVERVIEW .....	2
INSTALLATION.....	2
Requirements for Installation.....	2
Installation Instructions.....	2
FIND-O-MATIC .....	4
Find-O-Matic Settings .....	4
Using Find-O-Matic.....	5
Record Search.....	6
Open a Record .....	6
Open a Record: Non-Constituents.....	6
Cancel Search.....	7
Using Find-O-Matic in a Gift Batch .....	7
Configure the Gift Batch .....	7
Configure Find-O-Matic Settings .....	8
Donor Search .....	8
APPENDIX A – DOCUMENT REVISION HISTORY .....	10

## OVERVIEW

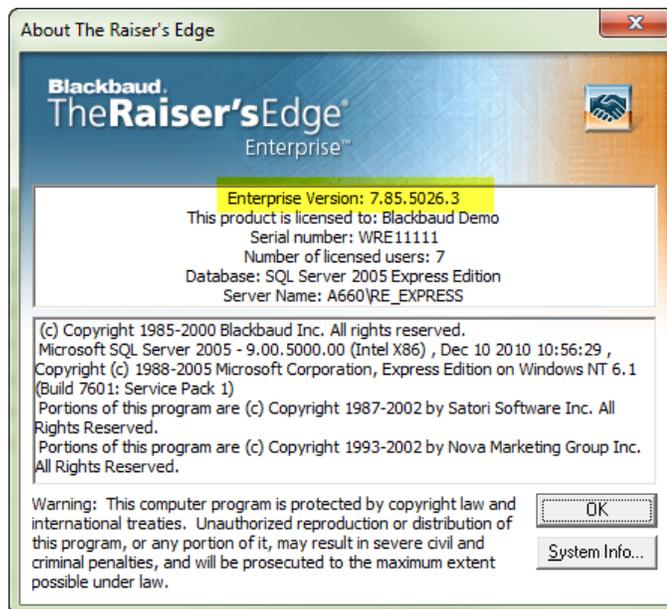
Find-O-Matic™ from O-Matic Software is a plug-in that allows users to quickly and easily find almost any record from almost anywhere within The Raiser's Edge. This will save you time as you will no longer need to navigate to the records tab and open a search. Multiple fields are searched at once including name, address, phone, email, nickname, plus more. And, unlike The Raiser's Edge, FOM can find non-constituent records for viewing and/or easy promotion to full constituents.

## INSTALLATION

### REQUIREMENTS FOR INSTALLATION

Ensure that you are running The Raiser's Edge version 7.85 or higher.

1. To check your version, log into The Raiser's Edge and select *Help - About The Raiser's Edge* from the toolbar.

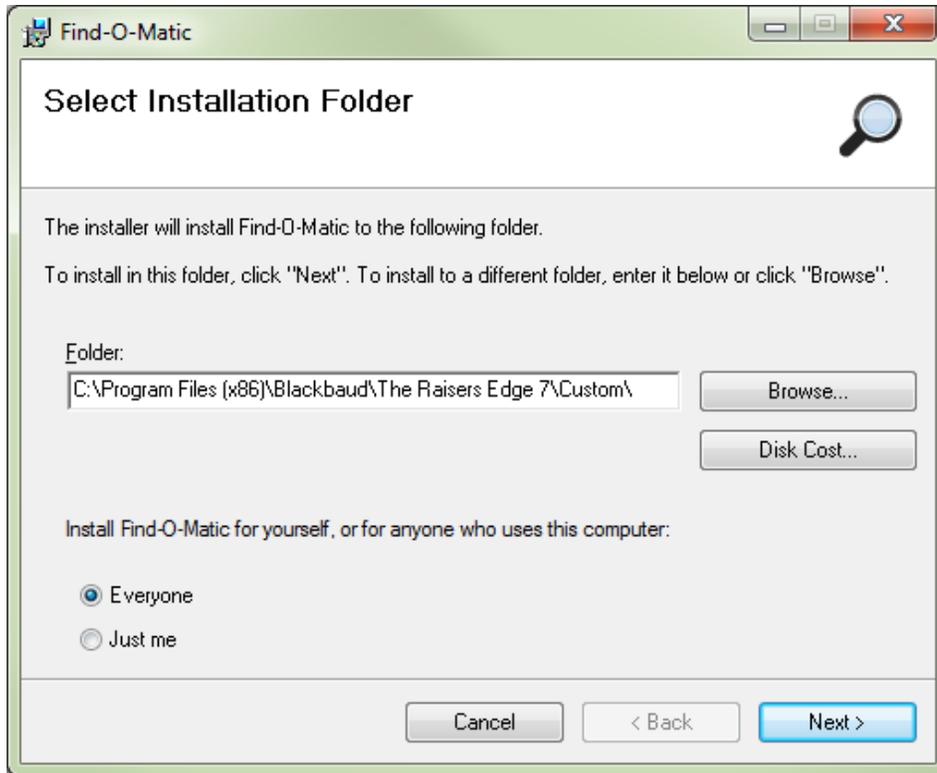


2. Exit The Raiser's Edge.
3. If The Raiser's Edge is installed locally but security restrictions prevent the software from being installed normally, please work with your system administrator to obtain appropriate rights prior to implementation.

### INSTALLATION INSTRUCTIONS

1. Download the latest version of the Find-O-Matic installer from O-matic Software's [Find-O-Matic forum](#).

2. If you downloaded the installer in a .zip archive, extract the contents of the .zip file.
3. Double-click the setup.exe file and, depending on your operating system and settings, you may receive a dialog asking if you want to run the installer.
4. Click *Next* to begin installation.



5. Choose an installation path. You must install Find-O-Matic into your Raiser's Edge Custom folder.

*If the Raiser's Edge has been installed into a non-standard folder, locate and select the Custom folder as your installation path. Otherwise, Find-O-Matic will not run.*

6. Click *Next* to continue your installation.
7. Click *Close* when finished.

## FIND-O-MATIC

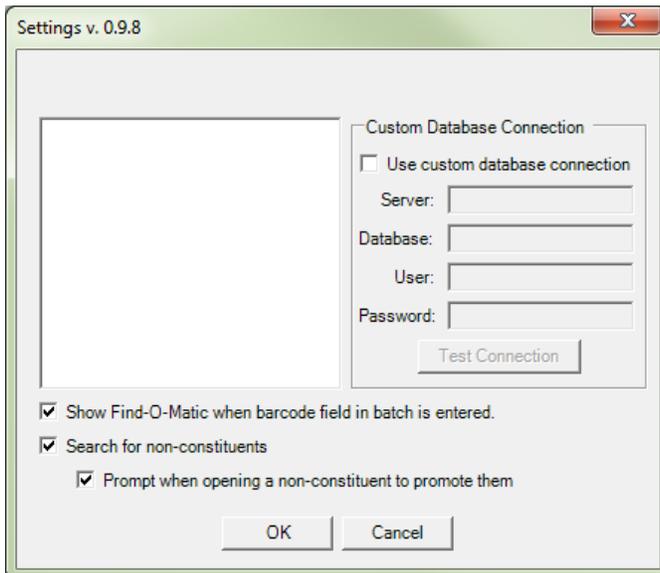
Need to look up a constituent? FOM can find them without the need to navigate to the constituent search. Only know someone's nickname but not their full name? Or just their phone number? FOM can find them. Find-O-Matic quickly and easily finds Raiser's Edge records from almost anywhere in RE.

Launch Find-O-Matic by quickly pressing the *ALT* key twice (*ALT, ALT*). FOM opens with a search window. Type your search value – as you type, FOM displays matching results.



## FIND-O-MATIC SETTINGS

Launch Find-O-Matic by quickly pressing the *ALT* key twice. FOM will open. Click the *Settings* link to open the settings window. Once you have configured the settings, click *OK* to save or *Cancel* to exit without saving.



### Custom Database Connection

In some network configurations there may be a connectivity issue with the Raiser's Edge database. If that is the case, select this option and enter the server name, database name, and login credentials. The *Test Connection* button ensures that all settings are correct.

### Show Find-O-Matic when barcode field in batch is entered

Select this option to automatically launch Find-O-Matic when entering data into the gift batch barcode field. See [Using Find-O-Matic in a Gift Batch](#) for more information on using FOM in a gift batch.

### Search for non-constituents

Select this option to allow FOM to include non-constituents in the search results.

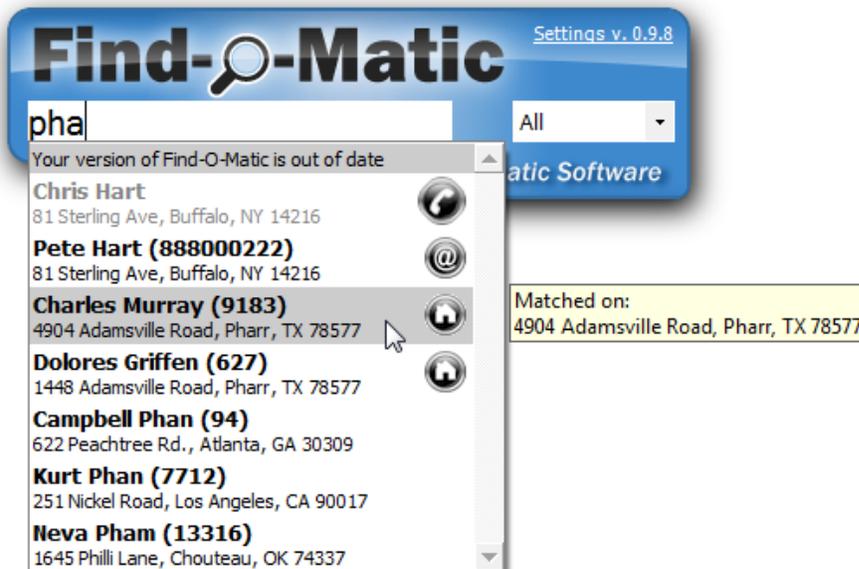
### Prompt when opening a non-constituent to promote them

Select this option if you wish to be prompted to promote non-constituents to full constituents. If cleared, selecting a non-constituent automatically promotes them to a full constituent without prompting.

## USING FIND-O-MATIC

Launch Find-O-Matic by quickly pressing the *ALT* key twice. FOM will open. Enter your search info into the text box. As you type, the search results will dynamically display in a dropdown.

*Search results will display once you have entered 3 or more characters.*



## RECORD SEARCH

Matches are displayed in a dropdown list. Records that are matched based on fields other than name display with an icon next the record. These include phone , email , address , or finder number . Hover over one of these records to see a tooltip with the matching information. Non-constituents are displayed in gray text and full constituents along with other records (such as events, appeals, etc) are displayed in black text.

*Search results are not sorted prior to displaying the records and are presented in the same order that they are returned by The Raiser's Edge.*

Use the record type dropdown to filter the search results. You may set this either before typing your search parameters or while viewing the search results. Results may be filtered by:

- All (no filtering)
- Appeal
- Campaign
- Constituent
- Event
- Fund
- Job
- Query
- Report

*The record type filter is not persistent and will default to 'All' for each new search.*

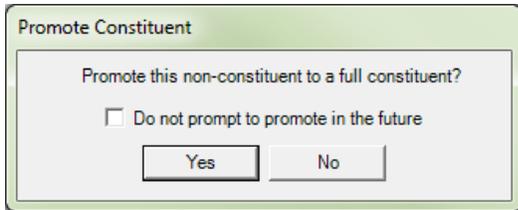
## OPEN A RECORD

Click on the desired record to open it. Press the *CTRL* key while clicking to open the record in read-only mode.

## OPEN A RECORD: NON-CONSTITUENTS

Click on the desired non-constituent record. If FOM settings are configured to not prompt when opening a non-constituent, the record will automatically be promoted to a full constituent and the record will be opened. If you wish to view the record in order to decide if it is the correct one before opening/promoting, press the *CTRL* key while clicking to open the record in read-only mode.

If FOM settings are configured to prompt when opening a non-constituent, a popup opens asking you to confirm promotion of the record to a full constituent.



Click *Yes* to promote the record to a full constituent and open the record.

Click *No* to open the non-constituent record. Tabs for data that require the record to be a full constituent (for example, Gifts, Membership, etc) are not available within the non-constituent record. Close the record to retain them as a non-constituent. Save and close to promote them to a full constituent.

## CANCEL SEARCH

Press the *ESC* key to cancel the search and close FOM.

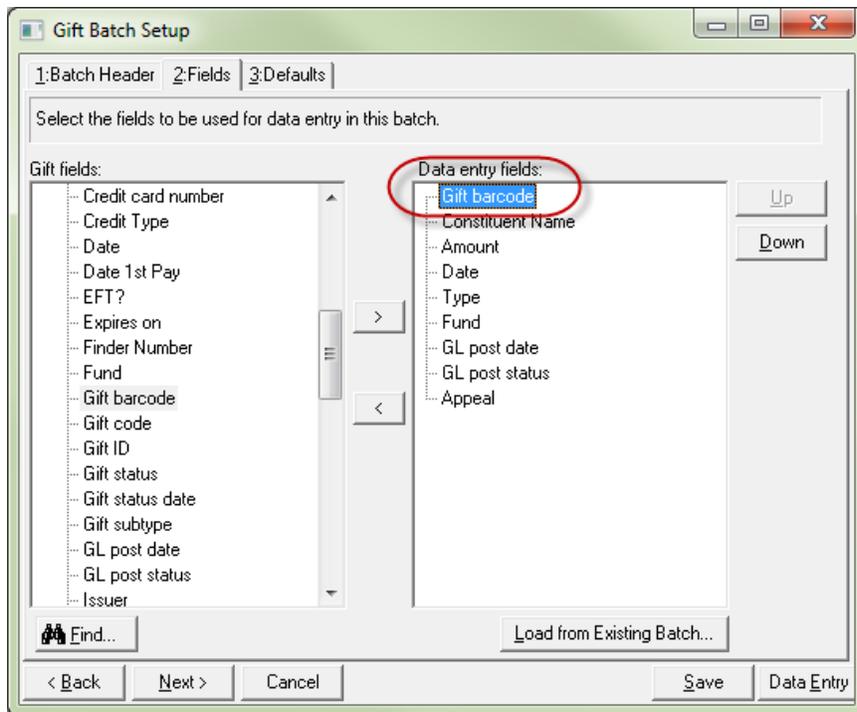
## USING FIND-O-MATIC IN A GIFT BATCH

Have you ever received a gift from a new donor only to later learn that they were already in your Raiser's Edge database as a non-constituent spouse or as a non-constituent event guest or as a non-constituent relationship to another donor? This scenario would require manually promoting the non-constituent to a full constituent and a merge with the donor record. In some cases you may never learn about their previous relationship to your organization and now you have duplicates and an incomplete picture of the new donor.

FOM lets you easily find and promote non-constituents when they become donors from within the gift batch. This prevents creating duplicate records and the person's prior relationship with your organization is retained along with their new giving information.

## CONFIGURE THE GIFT BATCH

When designing the gift batch, include the *Gift barcode* field.



## CONFIGURE FIND-O-MATIC SETTINGS

In FOM settings, ensure that the *Show Find-O-Matic when barcode field in batch is entered* option is selected. See [Find-O-Matic Settings](#) for more information.

## DONOR SEARCH

From within the gift batch, position the cursor in the barcode field. Enter a value to search on – you may search by name, phone, address, or any other field that is searchable via Find-O-Matic. When you tab out of the field the value entered is evaluated:

- If the value is a barcode and the donor is a non-constituent, they are automatically promoted to a full constituent and the constituent information is pulled into the batch from the constituent record.
- If the value is not a barcode, Find-O-Matic launches and performs a search based on this value. If the selected record is a non-constituent, FOM promotes them to a full constituent (either automatically or via a user prompt, depending on settings) and the constituent information is pulled into the batch from the constituent record.
- If FOM finds a match based on an appeal finder number, selecting this result will also populate the gift appeal and fund fields based on the constituent appeal with that finder number.

## FIND-O-MATIC GIFT BATCH OPTIONS

If FOM finds only one matching full constituent, that constituent is automatically entered into the batch. If FOM finds a matching non-constituent or finds multiple matches, FOM displays a list of results. You may do one of the following:

### Select a record

Click on one of the matching records to add them to the batch. If the selected record is a non-constituent, it is automatically promoted or you are prompted to promote (depending on settings) to a full constituent before it is added to the batch.

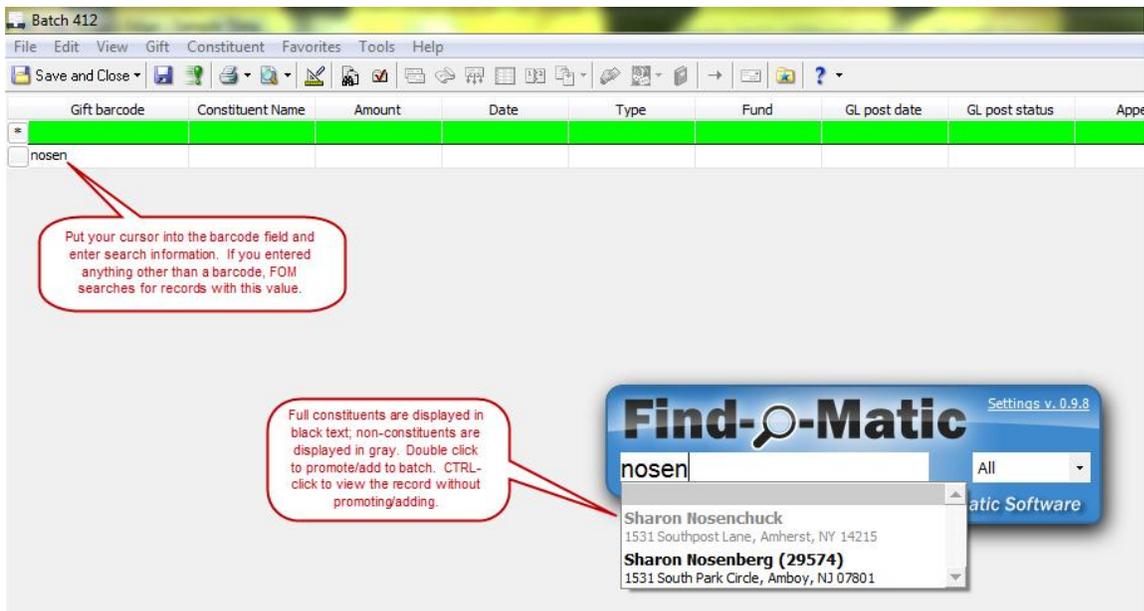
### View a record

If you wish to view more information about the record to ensure you have the correct person, hold the *CTRL* key while clicking on one of the matching records. It will be opened in a view-only mode.

*Viewing a non-constituent record does not promote it.*

### Cancel search

Click the *ESC* key to cancel the FOM search results.



## APPENDIX A – DOCUMENT REVISION HISTORY

### **Find-O-Matic version 0.9.8**

- Initial document release – August, 2012