

Development: Configuration Homepage

Updated Jul 19, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

Here is the new version of this article in the [Veracross Community](#).

This article pertains to [Development 3](#).

Overview

The Development: Configuration homepage is a homepage with a shared workspace where the systems, records, and data is configured and added into the system that allow the Development module to function as intended. This homepage is primarily designed with the advancement database administrator in mind, but should be useful for almost everyone working in a development office.

Constituents

Constituents are the record for the entity (household or organization) that has the potential to give the school money. Configure aspects of the Constituent record in this section.

General

Link Name	Purpose	Notes
Development Roles	view development roles	provides links to development role records; development roles are distinct from person roles
Person Roles	view person roles; flags person roles for constituent creation	person roles with the "Create Constituent" flag checked automatically create constituent records based on the person role in the nightly processes
Organization Roles	view organization roles; flags organization roles for constituent creation	organization roles with the "Create Constituent" flag checked automatically create constituent records based on the organization role in the nightly processes
Student Grade Levels	view grade levels; flags	grade levels with the "Create Constituent" flag checked

Link Name	Purpose	Notes
	grade levels for constituent creation	automatically create constituent records based on grade level in the nightly processes
Constituent Tag Categories	view tag categories; create new tags and categories	add new constituent tags through the category record add new categories through the "Add Record..." option in the Organize menu of the query results screen
Salutations	view and adjust salutations	adjust salutation format using checkboxes and clicking the "Update Records" button
Profile Code Categories	view profile code categories; create new profile codes	add new profile codes through the profile code category record
Create Opportunity by Constituent	assign staff solicitors; create opportunity records by constituent	add new opportunities by assigning fundraising activity in create opportunity column – can be batch updated
Update Opportunities via Importer	adjust fields for opportunities quickly	update opportunity data for all columns highlighted in blue

Screenings and Ratings

Screening sources provide giving-related information on donors and are typically pulled from data sources outside of Veracross, such as Wealth Engine and DonorSearch. View the sources in your database via the **Screening Sources** link. Create new configured and system ratings using the "Add Record..." option in the Organize menu of the relevant query results screen.

Link	Purpose	Notes
Configured Ratings	view, configure, and add your own ratings	you may want to mirror the rating system used by your screening sources. If you do this, you can configure screening sources to import data directly into your configured categories.
Primary Development Rating	view constituent ratings and add your own	you cannot delete system ratings. The scale is 1A-5D and represents capacity (1-5, 1 being highest capacity) and likelihood (A-D, A being most likely) to give. You can configure your own rating system with "Configured Ratings"
Connection Rating	view connection ratings and add your own	constituents' subjective connection to the school. You cannot delete default ratings but you can add new ones in any of the four categories
Engagement	view engagement ratings and	constituents' subjective engagement with school activities

Link	Purpose	Notes
Loyalty	view loyalty ratings and add your own	constituents' subjective loyalty to the school
Capacity	view capacity ratings and add your own	constituents' estimated monetary capacity to give to the school
Update System Ratings via Importer	adjust system ratings and scores for all constituents quickly	update rating and score data for all constituents from one query

Moves Management

Moves management is how the school manages actions for fundraising activities, constituents, and opportunities. These are split between actions (external) and tasks (internal).

Link	Purpose	Notes
Development Event Types	view, edit and add new development event types	click into the event type record to edit the configuration and add new event types using the "Add Record..." link in the Organize menu on the query results screen
Action Templates	view, edit, and add new action templates	click into the action template record to edit the configuration and add new templates using the "Add Record..." link in the Organize menu on the query results screen
Task Templates	view, edit, and add new task templates	click into the task template record to edit the configuration and add new templates using the "Add Record..." link in the Organize menu on the query results screen
Event Classifications	view, edit, and add new event classifications	click into the event classification record to edit the configuration and add new event classifications using the "Add Record..." link in the Organize menu on the query results screen

Data Integrity

Maintaining good data is essential for accurate reporting. Helpful links are detailed below:

- **Duplicate Constituents** displays all household/individual constituents that are flagged in constituent dupe groups. They appear in these groups when more than one constituent record is associated with the same Person ID.

Note: The Merge Duplicate Records procedure in the Action menu currently merges dupe groups that say "Duplicate" or "Person/Spouse Reversed", but do not merge groups with "Person-ID:" in it.

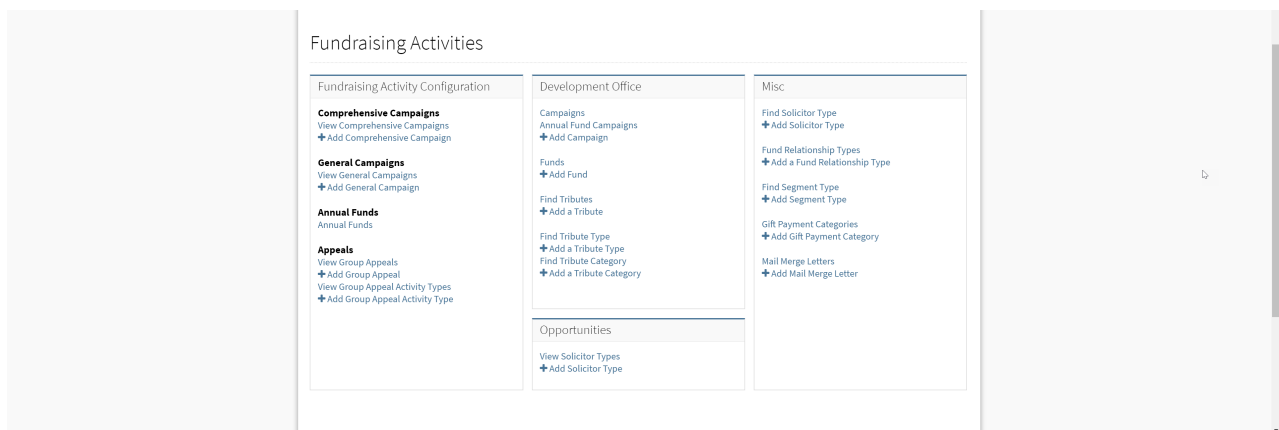
- **Duplicate Organization Constituents** is a query that displays all organization constituents that are flagged in constituent dupe groups. They appear in these groups when more than one constituent record is associated with the same Organization ID.

Note: The Merge Duplicate Records procedure in the Action menu currently merges dupe groups that say “Duplicate”, but do not merge groups with “Organization-ID:” in it.

Constituents are automatically tagged in a variety of situations such as "Married Faculty/Staff," "Widow/Widower, and "Split Family." View these pre-built lists here.

- **Married Faculty/Staff** is a query of all constituents who have the constituent tag of “Married Faculty/Staff”
- **Married Alum** is a query of all constituents who have the constituent tag of “Married Alum”
- **Widow/Widower** is a query of all constituents who have the constituent tag of “Widow/Widower”
- **Widow/Widower of Alum** is a query of all constituents who have the constituent tag of “Widow/Widower (Alumni)”
- **Widow/Widower of Trustee** is a query of all constituents who have the constituent tag of “Widow/Widower (Trustee)”
- **Split Family** is a query of all constituents who have the constituent tag of “Split Family”

Fundraising Activities



Fundraising Activity Configuration

View, add, and edit comprehensive campaigns, general campaigns, annual funds, and group appeals. To read more about fundraising activities, [please read our documentation here](#).

Comprehensive Campaigns

Comprehensive campaigns are a top-level overarching campaign designed to span multiple years. Other fundraising activities, individual initiatives, and efforts are all a part of the comprehensive

campaign. The **View Comprehensive Campaigns** link is a query that shows all Comprehensive Campaigns that currently exists in the database, grouped by Active and Inactive, with the ability to click into the Comprehensive Campaign records via link. Note that only one Comprehensive Campaign can be designated as Active at a time, and this value is able to be modified directly in the query results. Configure new Comprehensive Campaigns using the **+Add Comprehensive Campaign** link.

General Campaigns

General campaigns are designed to raise money toward a goal that exists outside of operating budgets (e.g., building a new stadium). General campaigns exist under a specific comprehensive campaign. The **View General Campaigns** link is a query that displays all General Campaign fundraising activities, grouped by Active and Inactive, with the ability to click into the General Campaign records with a link. Configure new General Campaigns using the **+Add General Campaign** link.

Annual Funds

Annual Funds are year-long repeating campaigns that run on a year-to-year basis with the specific intention of raising money for the subsequent year's operating budget. Annual funds exist under a specific comprehensive campaign. The **Annual Funds** link is a query that displays all Annual Funds fundraising activities, grouped by Active and Inactive, with the ability to click into the Annual Fund records with a link.

Appeals

Group appeals are small, concerted effort to target a specific group to raise money very quickly. Group appeals tend to exist under an annual fund or general campaign, but can also exist directly in a comprehensive campaign. The **View Groups Appeals** link is a query that displays all Group Appeal fundraising activities, grouped by Active and Inactive, with the ability to click into Group Appeal records with a link. Configure new Group Appeals using the **+Add Group Appeal** link. The **View Group Appeal Activity Types** link is a query that displays all Group Appeal fundraising activity types with the ability to click into Fundraising Activity Type records by clicking on the link. Configure new Group Appeal Activity Types using the **+Add Group Appeal Activity Type** link.

Development Office

This section makes use of the functionality defined in the old Veracross Development world.

Link	Purpose	Notes
Funds	view fund records	add new funds using the "+Add" link

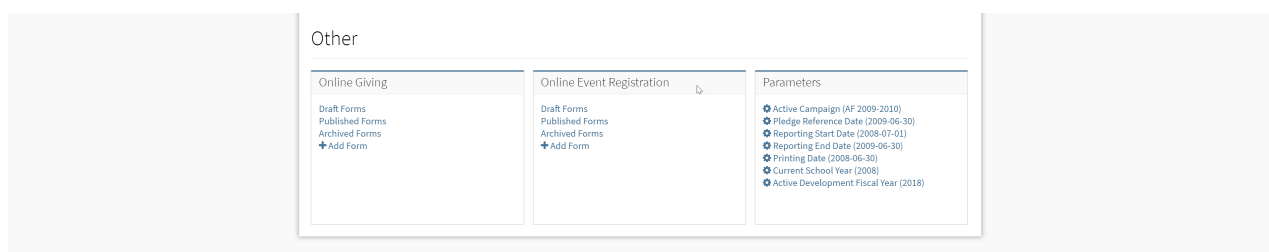
Opportunities

Opportunities are records that track the intersection of a constituent record with a fundraising activity record and track the entire process and progress of soliciting a specific constituent. Here, use the **View Solicitor Type** query to view all **opportunity** solicitor types and add new **opportunity** solicitor types using the **+Add Solicitor Type** link.

Misc

Link	Purpose	Notes
Find Solicitor Type	view, edit and add fundraising activity solicitor types	click into the fundraising activity solicitor types record to edit existing configurations; create new types using the "+Add" link
Find Segment Type	view, edit, and add segment types	click into the segment record to edit existing configurations; create new segments using the "+Add" link
Gift Payment Categories	view, edit, and add gift payment categories	click into the gift payment category record to edit existing configurations; create new categories using the "+Add" link
Mail Merge Letters	view, edit, and add mail merge letters	click into the mail merge letter record to edit existing configuration; create new letters using the "+Add" link

Other



Online Giving

Online giving is when you receive gifts from constituents online. **Draft Forms**, **Published Forms**, and **Archived Forms** are queries that show online giving forms with a status of Draft, Published, and Archived, respectively. Click on the **+Add Form** link to add a new form.

Online Event Registration

Online event registration is when people are able to sign-up and pay for events online. **Draft Forms**, **Published Forms**, and **Archived Forms** are queries that show registration forms with a status of Draft, Published and Archived, respectively. Click on the **+Add Form** link to add a new form.

Parameters

All links in the Parameters section are used to change each of the parameters that each link is referencing. The display format of these links are: Name of Parameter (Current Value of Parameter).

Following is a list of parameters that can be adjusted through this section:

- **Active Campaign**
 - **Pledge Reference Date**
 - **Reporting Start Date**
 - **Reporting End Date**
 - **Printing Date**
 - **Current School Year**
 - **Active Development Fiscal Year**
-