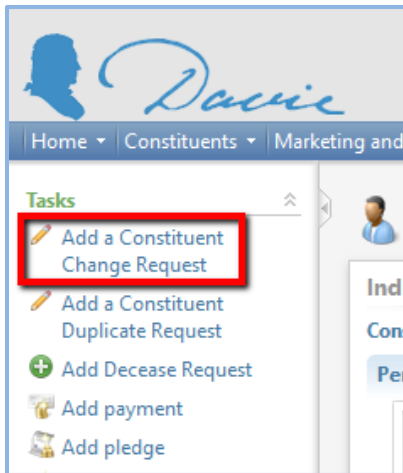




## Change Request Manual

11/12/2018

- The constituent Change Request Form is in the upper left corner of the screen on an individual's or organization's page.



- Use the form to make a change request on the following:
  - Personal/Organization Information (Name, Gender, DOB, etc.)
  - Contact Information
  - Relationships
  - Other changes
- DO NOT use the form for duplicate merge requests, Deceasing Requests, Special Codes, or Communication Preferences (see the end of the manual for how to request these items).
- **If you need to request updates on more than five records, submit a Davie Help Desk ticket and include a spreadsheet with the PIDs and updated information, rather than submitting an individual request for each one.**

The form is *multi-purpose*, so you **only need** to fill out the areas you wish to change. The form below is for individuals and will be slightly different for organizations.

**Add a Constituent Change Request**

*If you need to request updates to more than five records, please submit a DAVIE Help Desk Ticket and include a spreadsheet with the PIDs and updated information.  
You MUST provide the reason and context for your change request here, as well as the information source.  
You may use this space to include additional supporting information that doesn't fit elsewhere. Use the Other Changes area below for miscellaneous change requests not covered by other areas.  
Please provide as much information as possible to allow us to more quickly process your request and conform to Davie standards.*

☒ Personal Information

☒ Contact Information

☒ Addresses

☒ Phones

☒ Emails

☒ Relationships

☒ Other Changes

Save Cancel

The **Reason field at the top is required**. To assist in processing your request, please provide as much information as possible. Items to Include:

- Reason and context for the change
- Source of the information
  - If the information did not come directly from the constituent, a website for verification of the change, if possible
- Additional information that supports your request that you cannot fit elsewhere on the request form
- **DO NOT use this area for miscellaneous change requests that do not fit elsewhere. Use the Other Changes area at the bottom of the form.**

**Add a Constituent Change Request**

*If you need to request updates to more than five records, please submit a DAVIE Help Desk Ticket and include a spreadsheet with the PIDs and updated information.*  
*You MUST provide the reason and context for your change request here, as well as the information source.*  
*You may use this space to include additional supporting information that doesn't fit elsewhere. Use the Other Changes area below for miscellaneous change requests not covered by other areas.*  
*Please provide as much information as possible to allow us to more quickly process your request and conform to Davie standards.*

Open the poplars on the left edge of the green header bars to expand any areas you need to fill out.

- **Personal/Organization Information**
  - This section will change, depending on if you are on an individual or organization record. (See two screenshots below.)
  - The Website field is for the website of the individual or organization, **NOT** for a link to a website that supports your change request. (Supporting links should go in the Reason field at the top of the form, shown in the screenshot above.)

**Personal Information**

Last name:  Nickname:

First name:  Gender:

Middle name:  Birth date:

Title:  Title 2:  Website:

Suffix:  Suffix 2:

**Organization Information**

Organization Name:

Industry:

No. of employees:

No. of subsidiaries:

Organization Website:

- **Contact Information** – Each area has a section to request new information be added or to edit existing information

- **Addresses:**

- **Add New** – Use if you are:

- Adding a new address
    - Replacing an existing address or the constituent has moved
      - If the constituent has moved, Click the *Moved?* checkbox in the **Add New** list. DO NOT edit the existing address in the **Edit Existing** list.
    - NOTE that Address Type, City, and State are required

**Addresses**

**Add New:**

*If the constituent has moved from an address, add the new address, check the Moved box, and select the old address from the list. There is no need to edit the old address in the Edit Existing list.*

*Please provide an accurate start date, if known.*

**NOTE:** If you accidentally add a blank row to the list, you can delete it by clicking the gray box at the left side of the row and clicking the delete key.

	Address Type	Country	Address	City	State	ZIP	Start Date
*							

- **Edit Existing** – Use if you are:

- Correcting an error or typo
    - Updating Type/Primary/Do Not Contact
    - Adding an End Date when there is no new address to replace the old one.
      - Note that you cannot request an End Date on a Primary address.
  - If the constituent is an individual and has a new Business Address, please provide information regarding any change in employment in the Business Relationships area.

**Edit Existing:**

*Use ONLY to correct errors and typos or to update Type/Primary/Do Not Contact fields.*

*DO NOT use the Edit Existing list for a move to a new address.*

*Only update the end date when there is no new address to replace the old. You cannot request an end date on a Primary address - you must mark it Do Not Mail and provide a reason.*

	Address Type	Country	Address	City	State	ZIP	Start Date
	Business Mailing	United States	1 New Orchard Rd	Armonk	NY	10504-1722	7/15/2008

- **Phones and Emails:**
  - **Add New** – Use if you are:
    - Adding a phone number or email
    - Replacing an existing phone or email
      - Click the *Replace Old?* checkbox in the **Add New** list. DO NOT edit the existing phone/email in the **Edit Existing** list.
  - **Edit Existing** – Use if you are:
    - Correcting an error or typo
    - Updating Type/Primary/Do Not Contact

Phones

Add New:

If you are replacing an old phone, add the new number, check the *Replace Old* box, and select the old phone number from the list. There is no need to edit the old phone number in the *Edit Existing* list.

Please provide an accurate start date, if known.

NOTE: If you accidentally add a blank row to the list, you can delete it by clicking the gray box at the left side of the row and clicking the delete key.

	Phone Type	Country	Number	Start Date	Replace Old?	Old Phone Number	Primary?	Do Not Call
*					<input type="checkbox"/>		<input type="checkbox"/>	

Edit Existing:

Use **ONLY** to correct errors and typos or to update *Type/Primary/Do Not Contact* fields.

DO NOT use the *Edit Existing* list to replace an old phone.

Only update the end date when there is no new phone number to replace the old. You cannot request an end date on a *Primary* phone - you must mark it *Do Not Call* and provide a reason.

	Phone Type	Country	Number	Start Date	End Date	Primary?	Do Not Call?	Do Not Call Reason
	Business	United States	(914) 499-1900	11/8/2002		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Emails

Add New:

If you are replacing an old email, add the new address, check the *Replace Old* box, and select the old email address from the list. There is no need to edit the old email address in the *Edit Existing* list.

Please provide an accurate start date, if known.

NOTE: If you accidentally add a blank row to the list, you can delete it by clicking the gray box at the left side of the row and clicking the delete key.

	Type	Email Address	Start Date	Replace Old?	Old Email Address	Primary?	Do Not Email
*				<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Edit Existing:

Use **ONLY** to correct errors and typos or to update *Type/Primary/Do Not Contact* fields.

DO NOT use the *Edit Existing* list to replace an old email.


Only update the end date when there is no new email address to replace the old. You cannot request an end date on a *Primary* email address - you must mark it *Do Not Email* and provide a reason.

	Type	Email Address	Start Date	End Date	Primary?	Do Not Email?	Do Not Email Reason

- If you accidentally add a blank row to the **Add New** list, you can delete it by clicking the gray box at the left side of the row and clicking the delete key on your keyboard.


- **Relationships**

- This section will change, depending on if you are on an individual or organization record.
- Use the free-text fields for new relationships or changes to existing relationships.
- Use the appropriate field, depending on the type of relationship.
  - For **Individuals**:
    - **Personal Relationships** – marriage, divorce, parents, children, etc.
    - **Business Relationships** – employment changes, retirement, etc.
  - For **Organizations**:
    - **Relationships with Individuals** – board/foundation members, employees, contacts for the org, etc.
    - **Relationships with Other Organizations** – parent, subsidiary, etc.
- Provide the type of relationship and be specific about who is who in the relationship.
- Provide PIDs and names of records that are in Davie.
- If the related records are not in Davie, or you cannot find them in Davie, provide full name and contact information. There is no need to submit a separate Add New Individual/Organization Request in Davie for these situations.
- If you are changing an existing relationship, be sure to specify which relationship needs to change and the related individual's PID and name.
- Provide additional context, if needed, as relationship change requests may be complex. For example, marriages, divorces, and employment changes may require changes to addresses and other relationships, in addition to the main relationship.

 **Relationships**

**Personal Relationships:** *marriage, divorce, parents, children, etc.*  
*Provide PIDs or full name and contact info of related individuals. You MUST provide the relationship type.*

**Business Relationships:** *employment changes, retirement, etc.*  
*Provide PIDs or full name and contact info of related individuals or organizations. You MUST provide the relationship type.*

 **Relationships**

**Relationships with Individuals:** *board/foundation members, employees, contacts for the org, etc.*  
*Provide PIDs or full name and contact info of related individuals. You MUST provide the relationship type.*

**Relationships with Other Orgs:** *parent, subsidiary, etc.*  
*Provide PIDs or full name and contact info of related organizations. You MUST provide the relationship type.*

- **Other Changes**

- Use this area for any changes that do not fit in the existing areas of the form.
- **DO NOT use this area to request merging of duplicate records, submit Deceasing Requests, or request updates to Special Codes or Communication Preferences. Submit these requests using the existing buttons on the constituent's left side bar or the appropriate tabs.**

 **Other Changes**

*Please use this area to submit a request that is not covered by the areas above.*

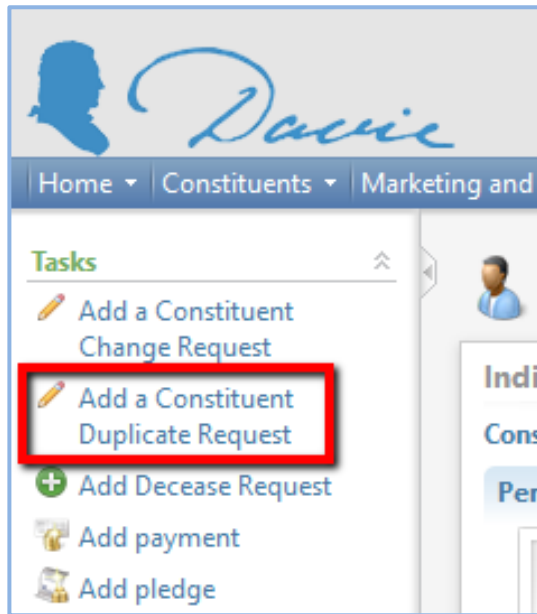
*DO NOT use this form to merge duplicate records, submit Mark Deceased Requests, or update Special Codes or Communication Preferences.*

When you are done filling out the form, click the **Save** button to submit your changes. You will receive an email summarizing the change, and another email when the request has been completed. Requests can take a few days to process, especially if they are complex. If it has been an extended time since you submitted your request, and you have not received confirmation it is complete, please submit a Davie helpdesk ticket.

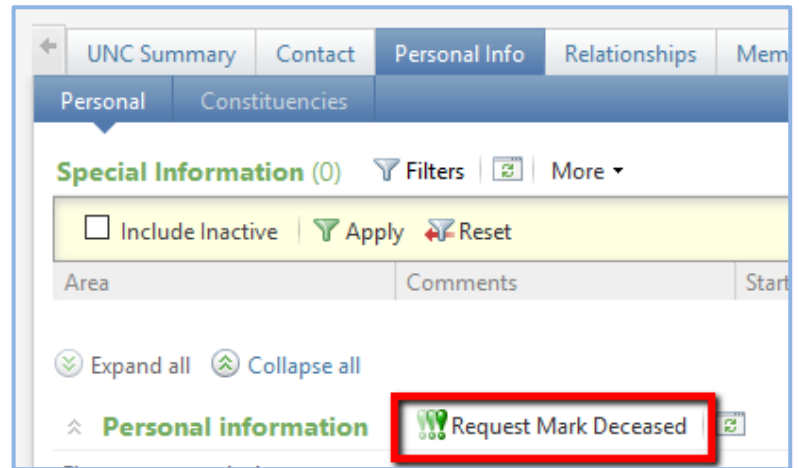
## Duplicate Merges, Deceasing Requests, Special Codes, Communication Preferences

The following change requests are processed outside of the main Change Request system. The screenshots indicate where to find the request buttons for these items.

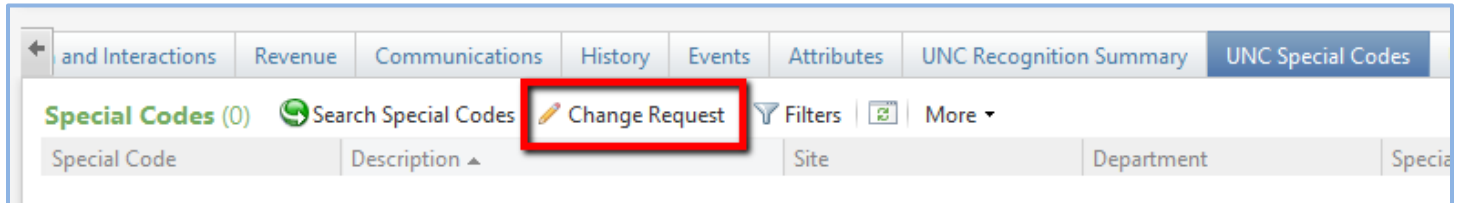
- Duplicate Merges



- Deceasing Requests



- Special Codes



- Communication Preferences

