



Charitweet for The Raiser's Edge

Overview

There are two versions of Charitweet; Charitweet Free and Charitweet Professional.

Charitweet Free enables your organisation to view a constituents Twitter activity directly in The Raiser's Edge. View recent tweets, followers, following and keep up to date with your supporters' interests to make your communications as targeted as possible and make sure you never miss an opportunity to engage.

Charitweet Professional goes even further allowing you to search Twitter and add constituents to RE directly from the plug-in, add information to existing constituents including biographical information, attributes and their actual tweets.

Charitweet Free includes a trial version of Charitweet Professional which is restricted to the Blackbaud Sample database.

Installation

After downloading either version of Charitweet and unzipping the install package you will see two folders; client and server. If you have no intention of running the professional version then you will not need to run the server install. Depending on your Raiser's Edge configuration you may not need to run it for the Professional version either.

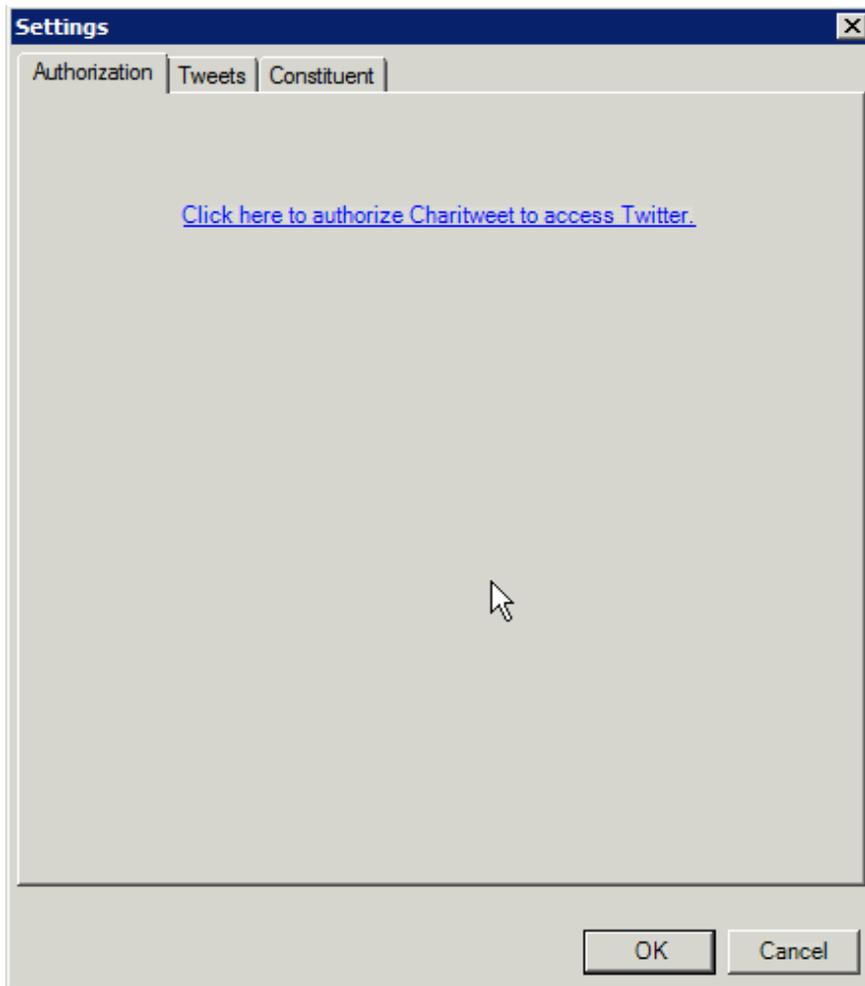
For both versions you will need to set up the application before first use. There are two methods to do this. The first method is available to both versions of the application and the second method is only available to the professional version.

Setting up Charitweet

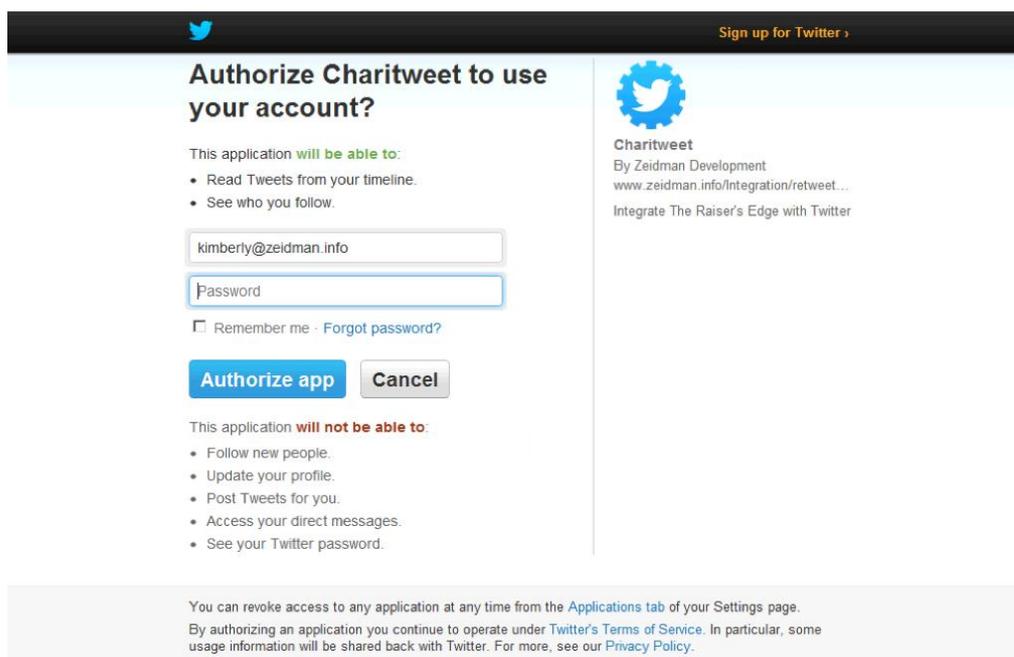
Open the plug-in from the plug-ins menu, you will be asked to set up Charitweet.

The first thing you'll need to do is authorise Charitweet to access your twitter account.

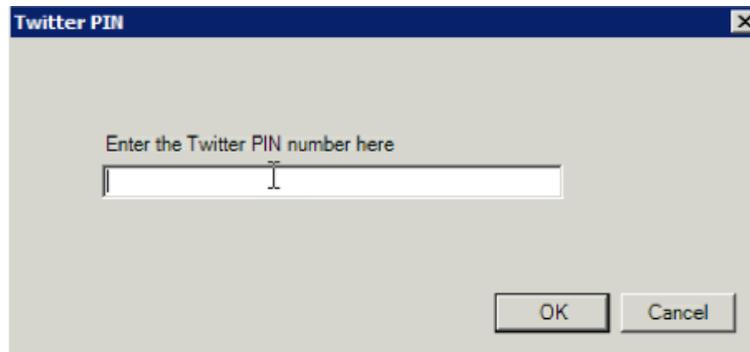




Click on the link and you'll be taken to Twitter and asked to sign in.



Once you sign in you'll be given a pin code, copy that and go back to RE, enter it in the box provided.

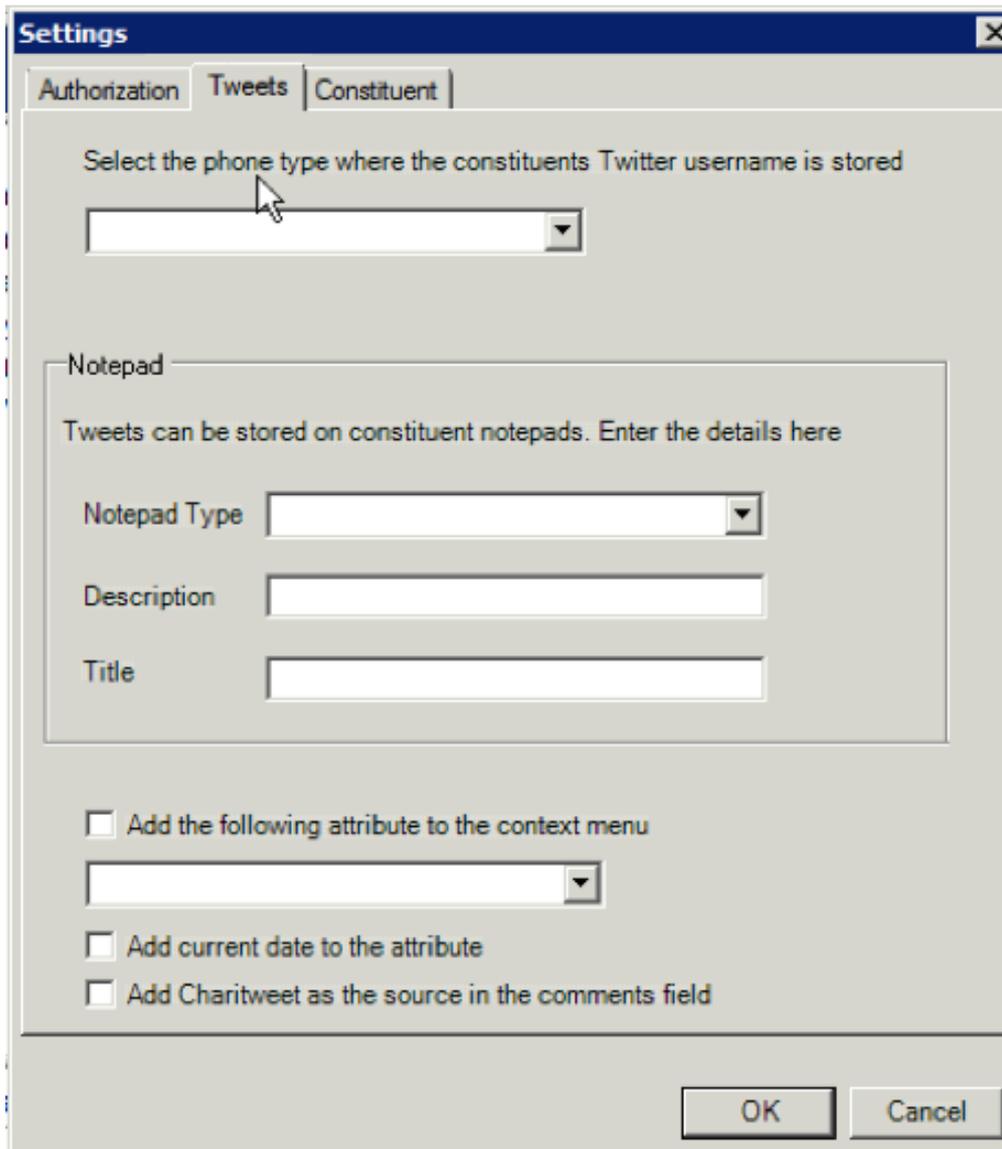


You will then need to configure your settings for Charitweet.

1 Set up via constituent record

In The Raiser's Edge open a constituent record. Click the macro button on the top menu bar. Click on Go.to.Charitweet. A window will pop up asking you if you would like to set up Charitweet, click 'yes'. You will be presented with the following set up screen:





For Charitweet Free the only setting that is used is the top drop down where you select the phone type you use to store Twitter user IDs (if you don't already have a specific phone type for this you will need to add one).

If you are using Charitweet Professional you may want to fill out the other areas too (see the next section for more detail).

That's it – you are ready to use Charitweet

2. Set up via Charitweet Professional plug-in

Go to the plug-ins section of RE and open up Charitweet Professional.



On starting the plug-in a window will pop up asking you if you would like to set up Charitweet, click 'yes'. The same settings window will appear and you will be required to entered the phone type that represents the Twitter handle. You may want to fill out the other areas too.

Please note you may need to create some table entries in the configuration area of RE to house this data before setting up the plug-in.

Tweet Settings

Select the phone type you use to store Twitter user IDs (if you don't already have a specific phone type for this you will need to add one).

You can also choose to set up a notepad type to store tweets and choose to add attributes and the current date to users you add from Charitweet. The attribute can have a drop down table or date format.

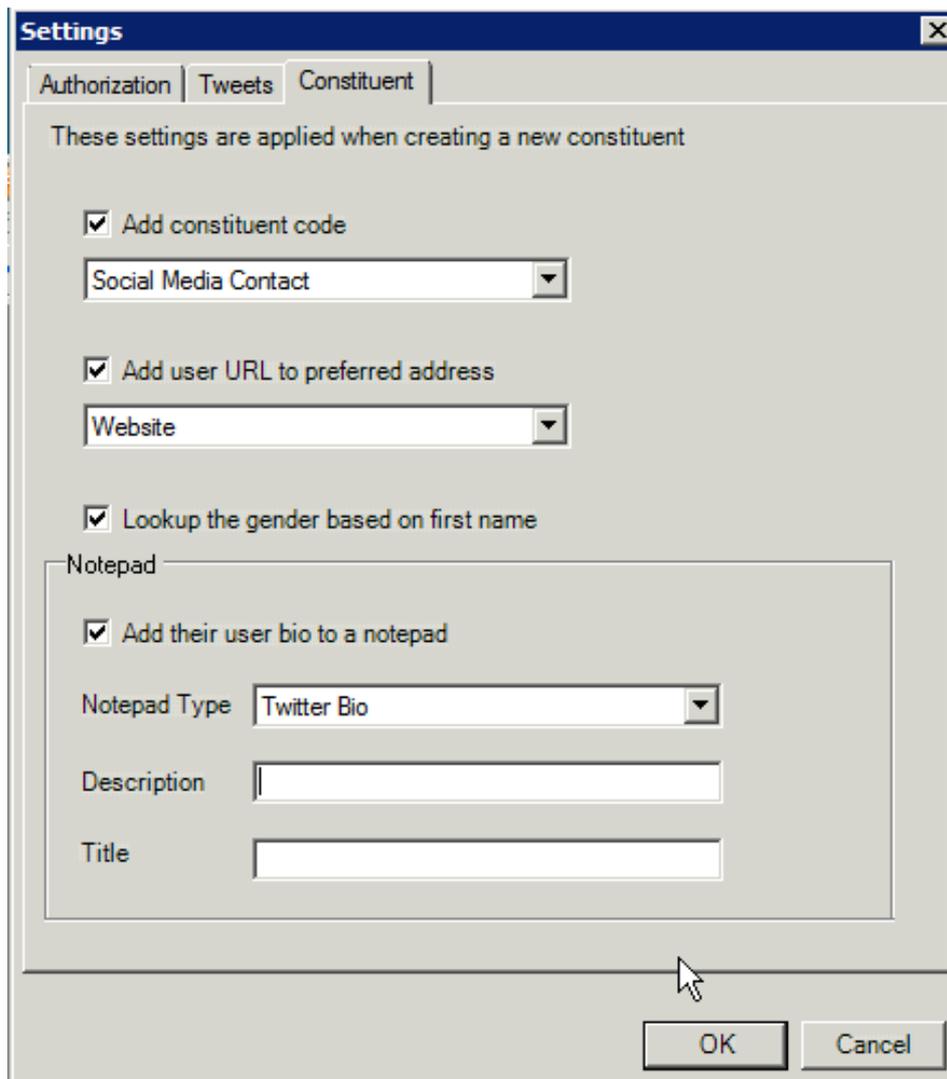
The screenshot shows a 'Settings' dialog box with three tabs: 'Authorization', 'Tweets', and 'Constituent'. The 'Tweets' tab is selected. The dialog contains the following elements:

- A label: "Select the phone type where the constituents Twitter username is stored"
- A dropdown menu with "Twitter" selected.
- A section titled "Notepad" with a sub-label: "Tweets can be stored on constituent notepads. Enter the details here"
- A "Notepad Type" dropdown menu with "Tweet" selected.
- A "Description" text input field.
- A "Title" text input field.
- A checked checkbox: "Add the following attribute to the context menu" with a dropdown menu showing "Social media".
- A checked checkbox: "Add current date to the attribute"
- A checked checkbox: "Add Charitweet as the source in the comments field"
- "OK" and "Cancel" buttons at the bottom right.



Constituent Settings

These settings are applied when creating a new constituent from Charitweet. You can choose to add a constituent code to new users, add the url they store in twitter as a preferred address, lookup their gender based on their real name and add their twitter bio to the notepad.



The screenshot shows a 'Settings' dialog box with three tabs: 'Authorization', 'Tweets', and 'Constituent'. The 'Constituent' tab is selected. The dialog contains the following elements:

- A header: "These settings are applied when creating a new constituent"
- Three checked checkboxes:
 - Add constituent code
 - Add user URL to preferred address
 - Lookup the gender based on first name
- A 'Notepad' section with:
 - Add their user bio to a notepad
 - A 'Notepad Type' dropdown menu set to 'Twitter Bio'
 - A 'Description' text input field
 - A 'Title' text input field
- At the bottom right, 'OK' and 'Cancel' buttons. A mouse cursor is pointing at the 'OK' button.

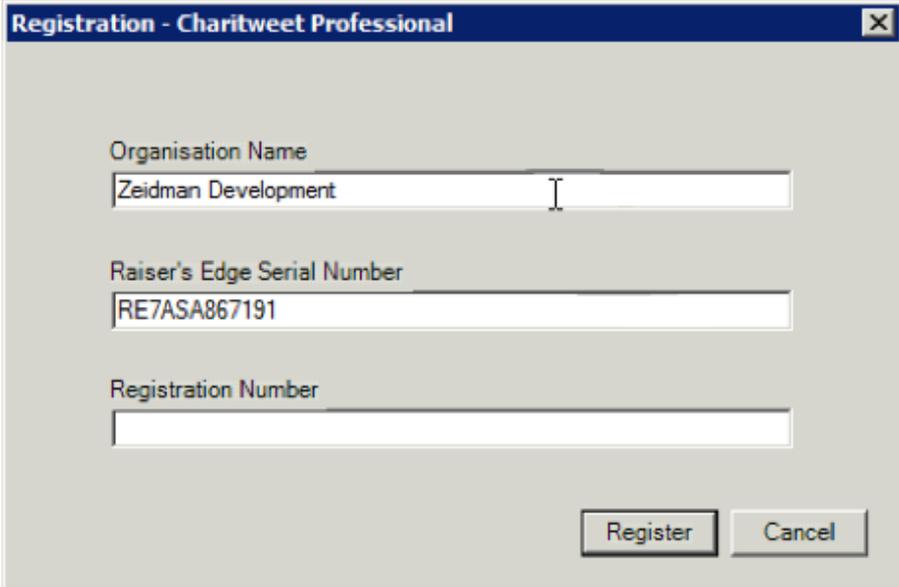
Once you are happy with these settings click ok and you're ready to use Charitweet.

Please note: installation depends on your set-up of RE, in some instances a server install may be required for the Professional version. If this is the case we will provide all the support you need to get you up and running smoothly.



Registration

Before being able to use Charitweet Professional in your production environment you will need to register it. The first time you click to search for a term you will be prompted to register the application.



The image shows a registration dialog box titled "Registration - Charitweet Professional". It contains three text input fields: "Organisation Name" with the value "Zeidman Development", "Raiser's Edge Serial Number" with the value "RE7ASA867191", and "Registration Number" which is currently empty. At the bottom right, there are two buttons: "Register" and "Cancel".

Simply enter the registration code that was sent to you when you purchased a licence. Your organisation name and serial number will pre-populate so you need simply enter the registration number. This is a one-time operation.

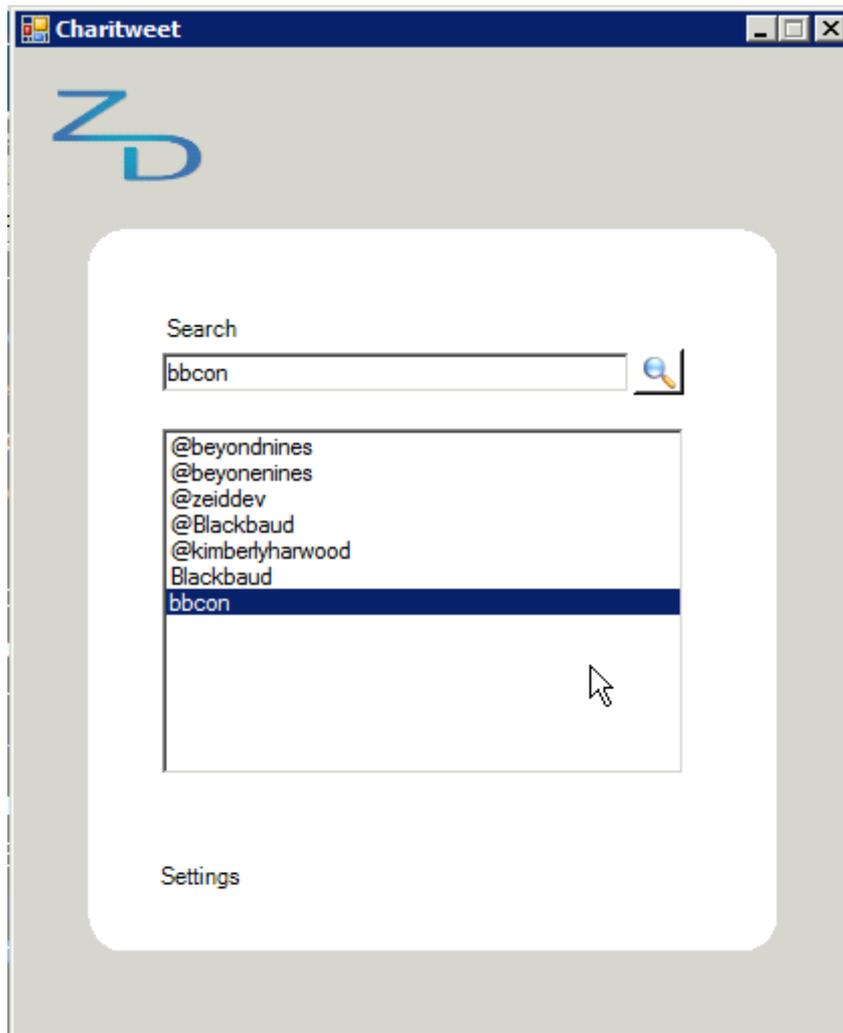
Charitweet Professional

Charitweet Professional has two areas of operation.

Search

Go to the plug-ins section of The Raiser's Edge and open Charitweet Professional. A Twitter search window will open up. Here you can search on names or keywords just as you would on Twitter.com, the box below the search box saves you recent searches for ease of access later.





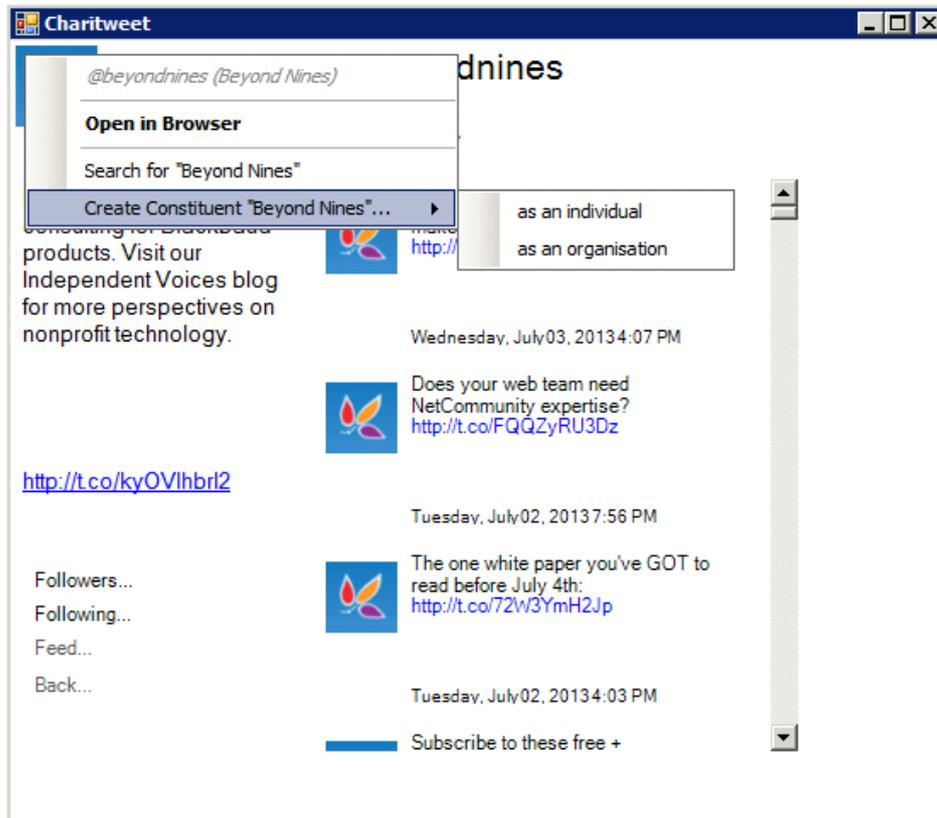
Hit the search button and you will see all the results in a new window.

If you click on a username it will open their twitter feed directly in the plug-in and you can view their followers and those following them here too. If you click on a hashtag it will show you the results for that, again directly in the window. If you click a link it will open it in your browser. There's also a 'back' button so you don't have to restart your search every time you open something new.

Add details to RE

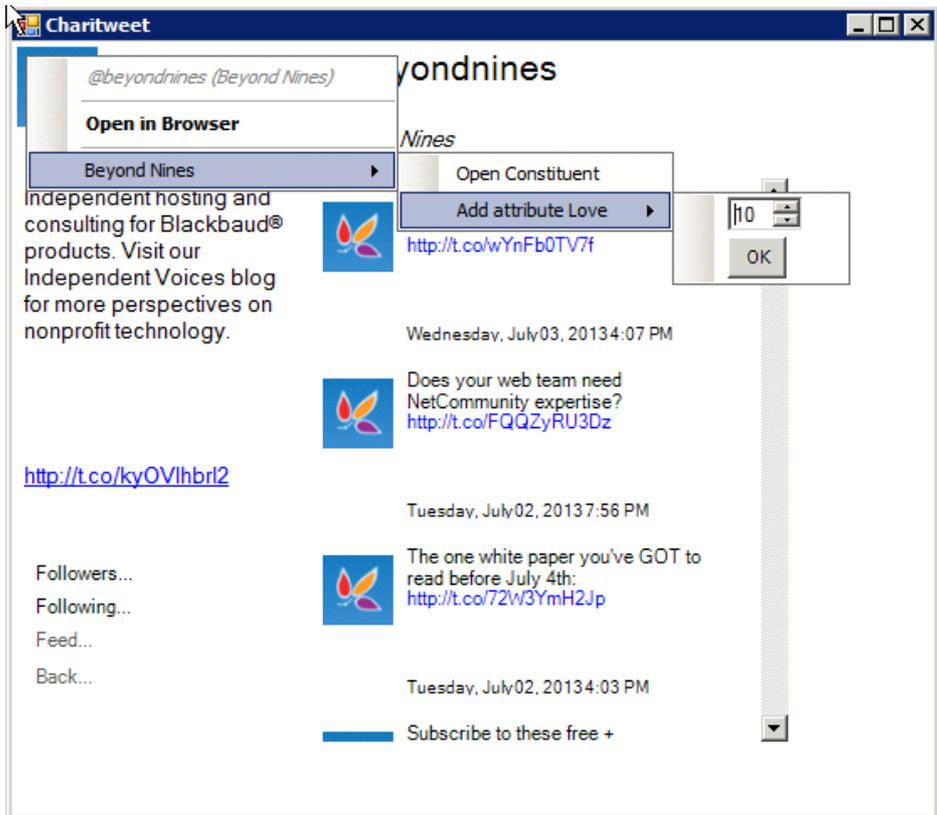
If you right click on a user's avatar you will open up the options to manage that user's details in RE. Charitweet will look for that person in your database using their twitter name (if assigned) first and last names and location, it will also allow you to search for them manually. If they don't exist in your database it will give you the option to add them as a constituent or organisation.





If they already exist you can choose to add any of their information to the record as defined in your settings.



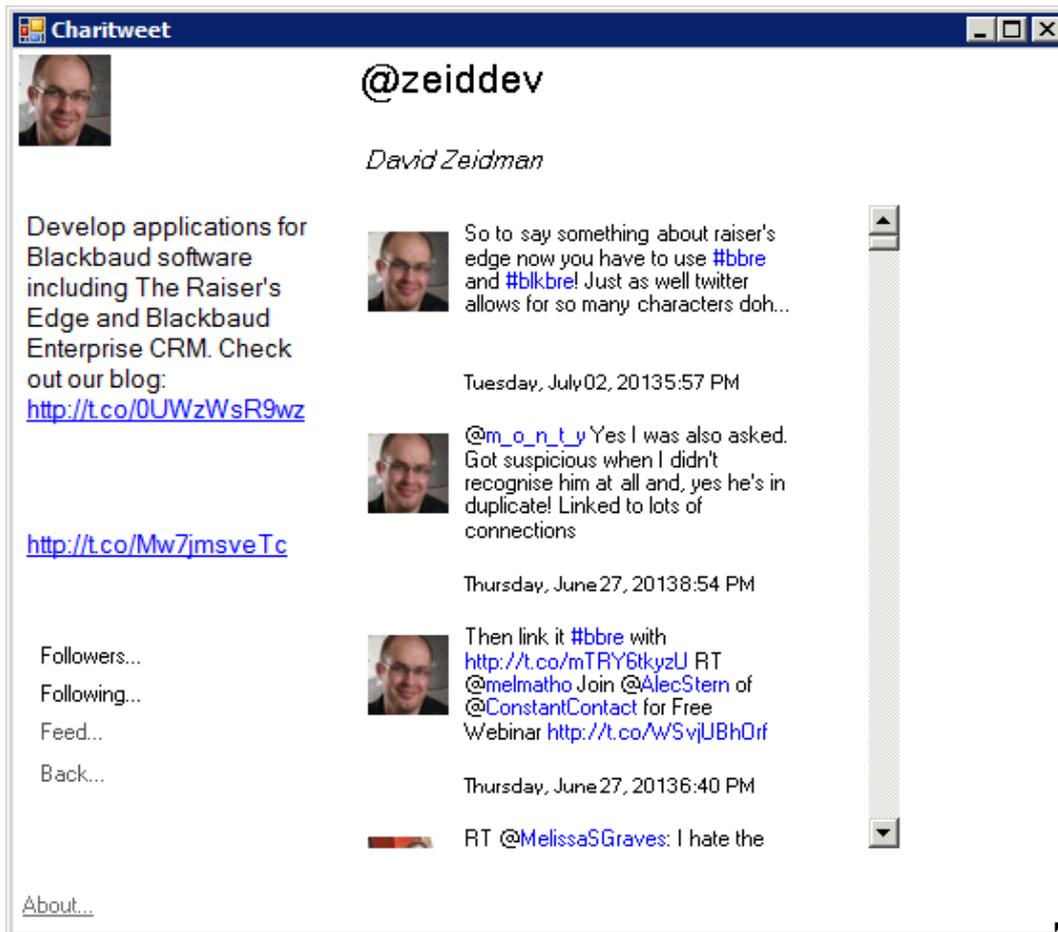


Charitweet Free

To use Charitweet open constituent record who has a Twitter user ID, click on the macro button and select Go.to.Charitweet .

A window will open with the constituents, user ID, real name and Twitter feed and info on it.





You can view followers or following using the links to the bottom left, click on feed to go back to the constituent's tweets.

Click on any link to open it in your web browser, or click on any twitter avatar to be taken to that users Twitter account page. To change your settings at any time in both the Free and Professional versions simply click on the 'About...' button at the bottom of the screen. This will open the 'about' window. Click on 'advanced' and then 'settings'.



