



BIO DEMOGRAPHICS **LUX TRAINING**

LAST UPDATED: OCTOBER 2025

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1 CREATE A CONSTITUENT

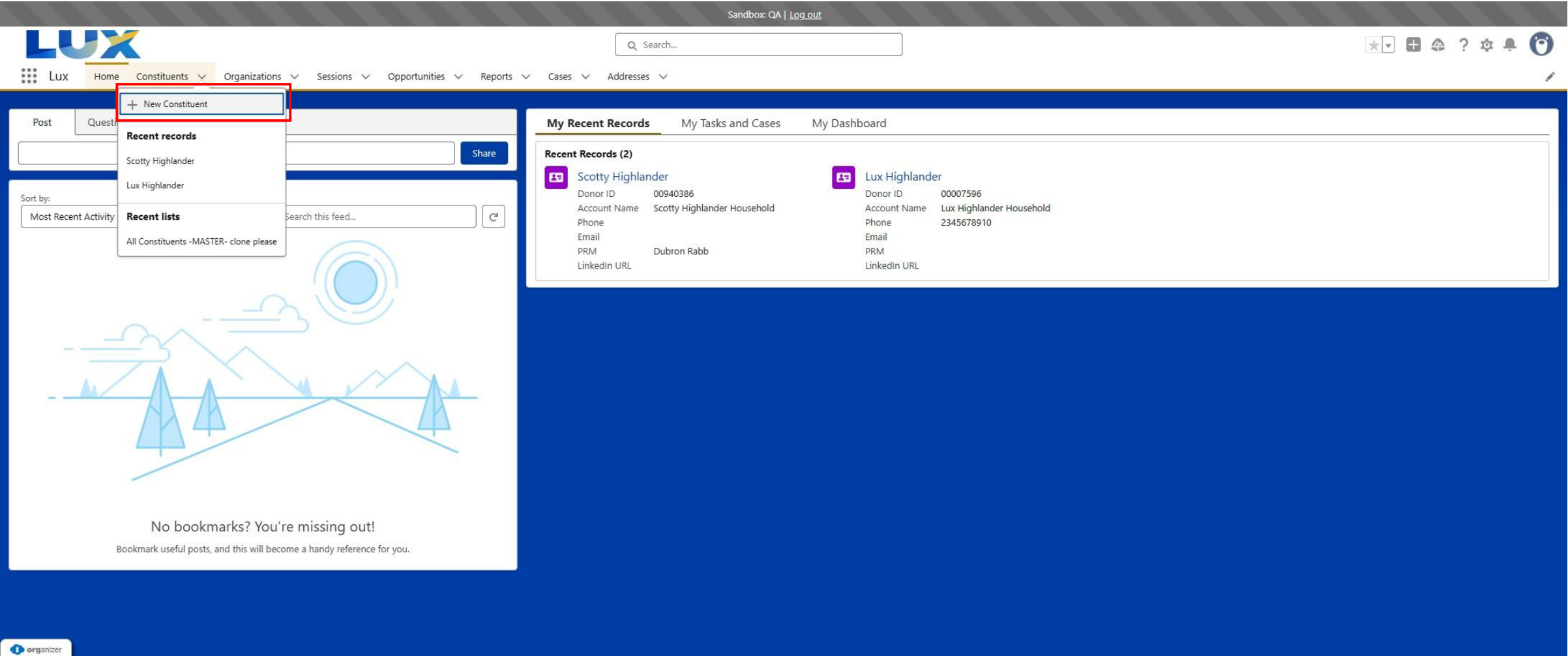
CREATE A CONSTITUENT



Let's walk through how to create a Constituent. It should be noted that an organization record layout is similar. There are, however, some changes in fields but the structure is almost identical.

CREATE A CONSTITUENT

1. On your homepage, click the drop-down arrow next to the Constituent tab, then click New Constituent.



CREATE A CONSTITUENT

2. In the pop-up window, fill in the required fields of constituent's first and last name, constituent type, data source. You may also fill out any other relevant information you have at the time of creation. Click Save.

Sandbox: QA | Log out

New Constituent: Constituent

* = Required information

* Name

Solution: --None--

Is Name Overridden: ☐

First Name:

Middle Name:

* Last Name:

Suffix:

Recognition Name:

Is Recognition Name Overridden: ☐

Pronouns: --None--

Gender: --None--

Professional Designation

Available: CLU, CPA, D.D.S., D.M.D.

Chosen:

Race/Ethnicity

Available: Black/African American, Asian, American Indian, Native Hawaiian/Other...

Chosen:

Marital Status: --None--

Religious: --None--

Description:

Is Anonymous: ☐

Additional Information

* Constituent Type

Available: Trustee - Current, Trustee - Former, UCRAA Board, Faculty - Current

Chosen: Alumni - Degreed

Student Type: --None--

Preferred Class Year:

Student Status: --None--

Preferred Class Year Type:

Student Level: --None--

Is Confidential: ☐

Home Address

Address Search:

Home Street:

Home City:

Home State/Province:

Home Zip/Postal Code:

Home Country:

Business Address

Address Search:

Business Street:

Business City:

Business State/Province:

Business Zip/Postal Code:

Business Country:

External System ID Information

Student ID:

Employee ID:

CPID:

Past PPS Employee ID:

Ext-SID:

SIS Name:

NetID:

System Information

Account Name:

* Data Source: --None--

Contact Record Type: Constituent

Cancel Save & New Save

2

MODIFY A CONSTITUENT RECORD

MODIFY A CONSTITUENT RECORD

1. Search for the constituent whose record you're modifying in the global search bar. Click on their record.

Search: All

scotty highlander

Scotty Highlander cases

Scotty A Highlander III cases

Scotty Highlander

Constituent • Scotty Highlander Household

Scotty A Highlander III

Constituent • Scotty & Mary Joe Highlander Household

Scotty Highlander

Constituent • Scotty Highlander Household

UCR Health Expansion

Opportunity • Scotty Highlander Household

Draft Proposal

Opportunity • Scotty & Mary Joe Highlander Household

Show more results for "scotty highlander"

Scotty Highlander

Constituent

+ Follow

Edit

Delete

Account Name

Scotty Highlander House...

Primary Affiliation

PRM

Dubron Rabb

Email

Phone

Preferred Address

900 North Point Street

San Francisco, CA 94109

United States

Preferred Class Year

Primary Constituent Type

Alumni - Degreed

Donor ID

00940386

Related List Quick Links

Constituent Names (2)

Salutations (Constitu... (9)

Address Relations (1)

Phones (0)

Emails (0)

Affiliations (0)

Relationships (Constitu... (1)

Degree Information (0)

Involvements (0)

Service Indicators (3)

Society Memberships (0)

Deductions (0)

Home Department Hi... (0)

Lux

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Post

Question

Poll

Share an update...

Share

Sort by:

Most Recent Activity

Search this feed...

No bookmarks? You're missing out!

Bookmark useful posts, and this will become a handy reference for you.

Lux Highlander

Donor ID

00007596

Account Name

Lux Highlander Household

Phone

2345678910

Email

PRM

LinkedIn URL

MODIFY A CONSTITUENT RECORD

- You will be redirected to the constituent's record page. From here, there are a few ways to modify their Biographic and Demographic information. The first way is to click Edit in the constituent card feature.

The screenshot displays the LUX Salesforce interface for a constituent record. The top navigation bar includes the LUX logo, a search bar, and various utility icons. The main content area is divided into a left sidebar and a right main panel. The left sidebar contains a constituent card for Scotty Highlander, which includes a photo, a 'View Critical Information' button, and three orange buttons: 'UCR - Global Invitations Opt-Out', 'The Wedding Singer', and 'Global: UCR Email Opt-Out'. Below these is a section for 'Scotty Highlander' with buttons for '+ Follow', 'Edit' (highlighted with a red box), 'Delete', and 'Manage Household'. The right main panel shows the 'Overview' tab of the constituent record, which includes fields for Name, Recognition Name, Pronouns, Professional Designation, Marital Status, Spouse, Salutation Preference, Is Anonymous, Primary Affiliation, Restricted Party Screening Alert, and Extend Bell Tower Society Membership. It also has sections for 'Degree Information' and 'Additional Information'.

Overview | Constituent Details | Prospect Management | Our UCR | Chatter

Name	Scotty Highlander	Is Name Overridden	<input type="checkbox"/>
Recognition Name	Scotty Highlander, M.D.	Is Recognition Name Overridden	<input type="checkbox"/>
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Heidi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous	<input type="checkbox"/>		
Primary Affiliation			
Restricted Party Screening Alert	<input type="checkbox"/>		
Extend Bell Tower Society Membership	<input type="checkbox"/>		

▼ Degree Information

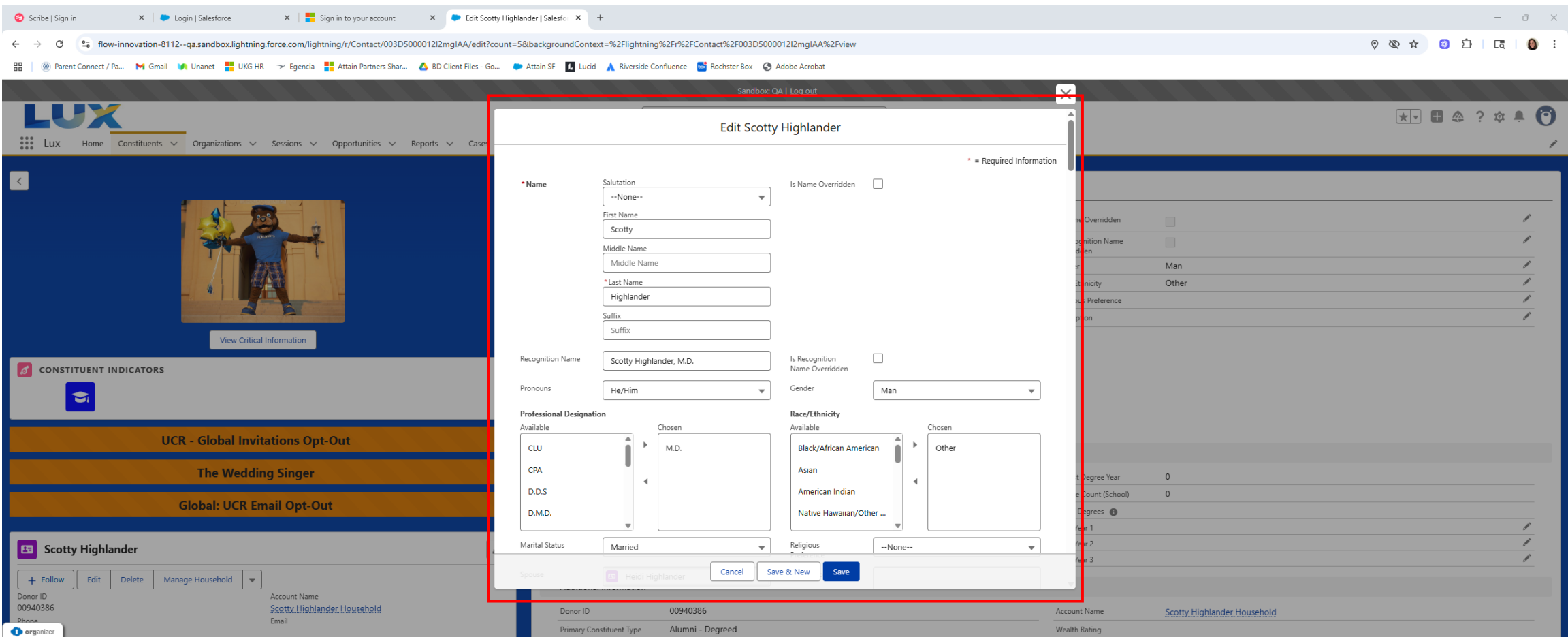
Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

▼ Additional Information

Donor ID	00940386	Account Name	Scotty Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	

MODIFY A CONSTITUENT RECORD

3. A popup will appear and should look familiar because it's the same screen as the popup that appears when creating a new constituent. To add or change information, simply enter or change information in the relevant fields and press save.



-
-
-
4. The second way to modify a constituent's Bio Demo information is to click the pencil button next to any field in the Overview section of their record page. Clicking the pencil will make the fields on the Overview page editable. Simply enter or change the information in the relevant fields, then press Save.

The screenshot displays the LUX CRM 'Overview' page for a constituent named Scotty Highlander. The interface is divided into several sections:

- Top Navigation Bar:** Includes the LUX logo, a search bar, and various utility icons.
- Left Sidebar:** Contains a 'View Critical Information' button, a 'CONSTITUENT INDICATORS' section with a graduation cap icon, and three orange buttons: 'UCR - Global Invitations Opt-Out', 'The Wedding Singer', and 'Global: UCR Email Opt-Out'.
- Constituent Summary:** A card for 'Scotty Highlander' showing a donor ID (02940386) and an account name (Scotty Highlander Household).
- Main Content Area (Overview Tab):** A form for updating constituent details. The 'Name' section is highlighted with a red box and includes fields for First Name (Scotty), Middle Name, Last Name (Highlander), Suffix, and Recognition Name (Scotty Highlander, M.D.). Other sections include Professional Designation (Available: CLU, CFA, D.D.S, D.M.D.; Chosen: M.D.), Race/Ethnicity (Available: Black/African American, Asian, American Indian, Native Hawaiian/Other Pacific Islander; Chosen: Other), Religion (Chosen: --None--), and Marital Status (Chosen: Married). A red box highlights the 'Save' button at the bottom right.

MODIFY A CONSTITUENT RECORD

- The last way to modify a constituent's Bio Demo information is to click into the Constituent Details tab on the constituent's record page. From there, select the tab related to the information you'd like to add or modify.

The screenshot displays the LUX CRM interface. The top navigation bar includes the LUX logo, a search bar, and various utility icons. The main navigation menu on the left lists: Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, and Addresses. The central area shows the 'Constituent Details' tab for 'Scotty Highlander'. This tab is highlighted with a red box and contains sub-tabs: Giving Details, Names, Salutations, Addresses, Phones, Emails, Social Media, Affiliations, Relationships, Funding Interests, Degree Information, Stewardship, Involvements, Service Indicators, Deductions, Memberships, and More. The 'Giving Details' sub-tab is also highlighted with a red box and contains sections for Giving Totals, Pledge Payments, Pledges / Recurring Gift Commitments, and Gifts. The bottom section of the interface shows 'Constituent Giving - Top Designations'.

Constituent Details

Giving Details

Filter by Designation

Apply Filter Clear

Giving Totals

	Fundraising	Cash
Lifetime		
Campaign		

Pledge Payments

	Amount	Date	Unit
First			
Largest			
Most Recent			

Pledges / Recurring Gift Commitments

	Amount	Date	Unit
First			
Largest			
Most Recent			

Gifts

	Amount	Date	Unit
First			
Largest			
Most Recent			

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID: 00940386
Phone: [Redacted]
PRM: Dubron Rabb

Account Name: Scotty Highlander Household
Email: [Redacted]
LinkedIn URL: [Redacted]

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 of 0 records(s).

Constituent Giving - Top Designations

MODIFY A CONSTITUENT RECORD

6. Once you're in the correct subtab within the Constituent Details tab, you can either add new data to the record page or edit current data. To add new data, click New. Note: "Names" lists all current, former, formal, informal, and nicknames that a constituent has.

[illegible]

MODIFY A CONSTITUENT RECORD

7. A popup will appear. Complete the required fields (they have a red arrow next to them) and fill out any additional details you have at the time. Click Save.

The screenshot displays the LUX system interface with a modal window titled "New Constituent Name: Constituent Name". The modal form includes the following sections:

- Information:** Contains fields for Constituent (populated with "Scotty Highlander"), Data Source (set to "--None--"), Type (set to "--None--"), Prefix (set to "--None--"), First Name, Middle Name, Last Name, Suffix (set to "--None--"), and Nickname.
- Professional Designation:** Features an "Available" list (CLU, CPA, D.D.S., D.M.D.) and a "Chosen" list.
- Notes:** A text area for additional information.
- Our UCR - Portal Settings:** Includes a checkbox for "Is Display On Portal" which is checked.
- System Information:** Contains fields for "Constituent Name ID" (set to "[Default Name]"), "Helper Field - Searchable Name", and "Legacy Source ID".

At the bottom of the modal, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with a red box. In the background, the main interface shows the constituent record for "Scotty Highlander" with details like Donor ID (00940386), Account Name (Scotty Highlander Household), and various tabs for managing the record.

MODIFY A CONSTITUENT RECORD

- To modify data that is already in the system, navigate to the Constituent Details tab, then select the subtab related to the data you want to modify. Then, click on the pencil icon next to the data you want to modify.

The screenshot displays the LUX CRM interface. At the top, there's a navigation bar with the LUX logo and various menu items like Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, and Addresses. A search bar is also present.

The main content area is divided into two columns. The left column shows a profile card for "Scotty Highlander" with a photo of a person holding balloons and a button labeled "View Critical Information". Below this are three orange banners: "UCR - Global Invitations Opt-Out", "The Wedding Singer", and "Global: UCR Email Opt-Out".

The right column shows the "Constituent Details" view for "Scotty Highlander". It includes tabs for Overview, Constituent Details (selected), Prospect Management, Our UCR, and Chatter. Under "Constituent Details", there are several sub-tabs: Giving Details, Names (highlighted with a red box), Salutations, Addresses, Phones, Emails, Social Media, Affiliations, Relationships, Funding Interests, Degree Information, Stewardship, Involvements, Service Indicators, Deductions, Memberships, Contact Matches, and More. The "Names" tab contains a table with two rows of name information:

PREFIX	FIRST NAME	LAST NAME	MIDDLE NAME	TYPE	SUFFIX	PROFESSIONAL DESIGNATION	DATA SOURCE	CONSTITUENT NAME ID	ACTIONS
	Scotty	Highlander		Full Name		M.D.		N-0000310	[Edit] [Delete]
	Scotty	Highlander		Former			Karma	N-0000306	[Edit] [Delete]

At the bottom of the "Names" section, it says "Showing 1 to 2 of 2 record(s)".

MODIFY A CONSTITUENT RECORD

8. A popup will appear. Add or edit information in the relevant fields, then click Save.

The screenshot displays the LUX CRM interface with a modal window titled "Edit N-0000310" open over the constituent record for Scotty Highlander. The modal contains the following sections:

- Constituent Information:** Fields for *Constituent (Scotty Highlander), *Type (Full Name), Prefix (--None--), First Name (Scotty), Middle Name, Last Name (Highlander), Suffix (--None--), Data Source (--None--), Constructed Name (Scotty Highlander), and Nickname.
- Professional Designation:** A list of available designations (CLU, CPA, D.D.S, D.M.D.) and a chosen designation (M.D.).
- Notes:** A text area for additional information.
- Our UCR - Portal Settings:** A checkbox for "Is Display On Portal".
- System Information:** Fields for Created By (Jennifer Best, 8/22/2024, 11:46 AM), Last Modified By (Jennifer Best, 8/22/2024, 11:46 AM), *Constituent Name ID (N-0000310), Helper Field - Searchable Name, and Legacy Source ID.

At the bottom of the modal, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red box.

The background interface shows the LUX CRM navigation menu, a search bar, and a list of constituent records. The record for Scotty Highlander is selected, and the modal is open for editing.

3

MANAGE PROFILE PICTURE

MANAGE PROFILE PICTURE

1. Navigate to the constituent's record page, then click the dropdown arrow in the constituent card feature.

Scotbe | Sign in

Scotly Highlander | Constituents

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D500001202mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egenia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Conference Rochester Box Adobe Acrobat

Sandbox QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Search...

Star Add ? Settings Profile

View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotly Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386 Account Name Scotly Highlander Household

Phone Email

PRM LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT ROLE START DATE END DATE

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Overview

Constituent Details Prospect Management Our UCR Chatter

Name Scotly Highlander

Recognition Name Scotly Highlander, M.D.

Pronouns He/Him

Professional Designation M.D.

Marital Status Married

Spouse Heidi Highlander

Salutation Preference Joint

Is Anonymous

Primary Affiliation

Restricted Party Screening Alert

Extend Bell Tower Society Membership

Is Name Overridden

Is Recognition Name Overridden

Gender Man

Race/Ethnicity Other

Religious Preference

Description

Preferred Class Year Type

Degree Year 0

Preferred Class Year

Earliest Degree Year 0

Degree Count (School) 0

List of Degrees

Class Year 1

Class Year 2

Class Year 3

Donor ID 00940386

Primary Constituent Type Alumni - Degreed

Constituent Type Alumni - Degreed

Student Type

Student Status

Student Level

Stage of Readiness

PRM

Account Name Scotly Highlander Household

Wealth Rating

Do Receive Household Soft Credit

Is Exclude From Household Name

Is Confidential

Is Solicitable

Has Contact Information

Birth Month October

Birth Day 10

Birth Year 1954

Deceased Month

Deceased Day

Deceased Year

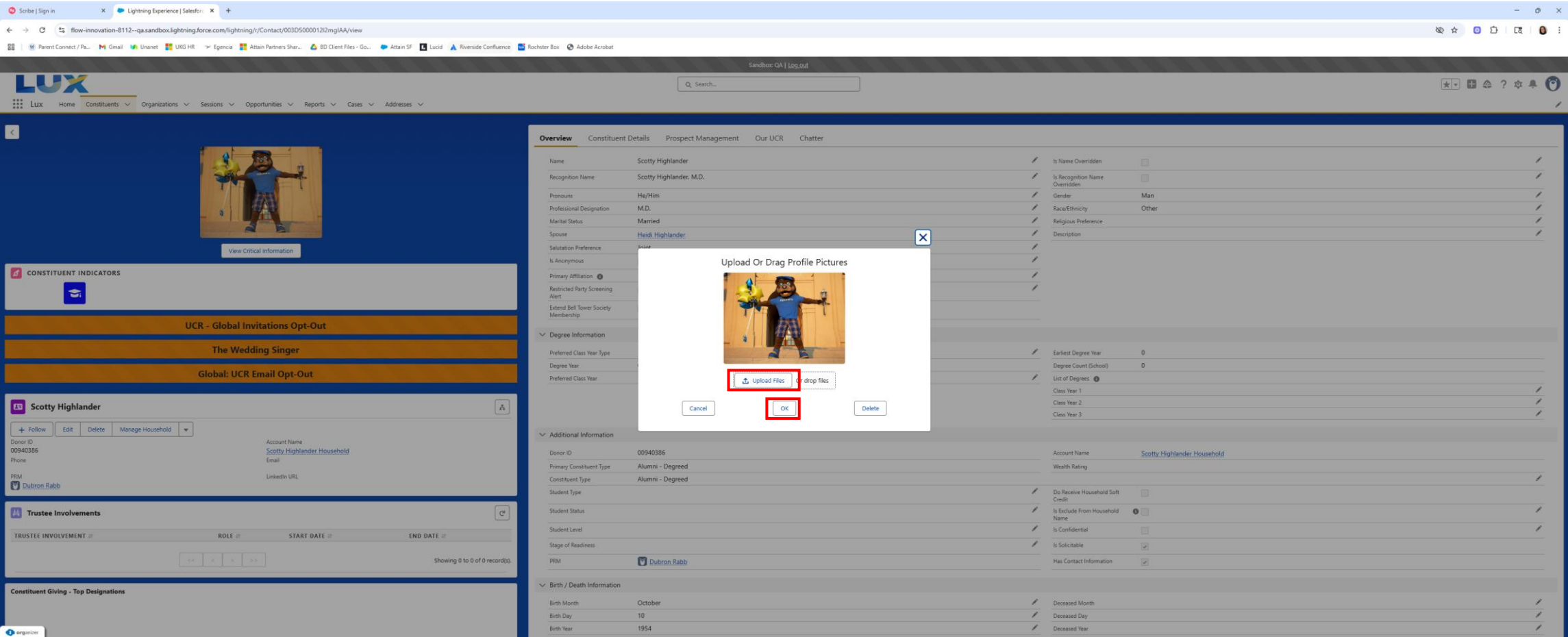
MANAGE PROFILE PICTURE

2. Click **Manage Profile Picture** in the dropdown.

[illegible]

MANAGE PROFILE PICTURE

2. A popup will appear. Upload the appropriate file from your desktop, then click OK.



4

NAVIGATE A CONSTITUENT RECORD PAGE

CONSTITUENT INDICATORS

Scribe | Sign In

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D50000120mgIAA/view

Parent Connect / Pa... Gmail Ulanet UKG HR Egenic Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

LUX

Lux Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Search...

Star Add Share Help Settings Profile

View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

nor ID
0940386
one
M
Dubron Rabb

Account Name
[Scotty Highlander Household](#)
Email
LinkedIn URL

Trustee Involvements

RUSTEE INVOLVEMENT ROLE START DATE END DATE Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Alerts

1 of 1 item

Comment

Start Date

End Date

Scotty is allergic to peanuts Mar 5, 2025

Overview

Constituent Details Prospect Management Our UCR Chatter

Name Scotty Highlander Is Name Overridden

Recognition Name Scotty Highlander, M.D. Is Recognition Name Overridden

Pronouns He/Him Gender Man

Professional Designation M.D. Race/Ethnicity Other

Marital Status Married Religious Preference

Spouse Heidi Highlander Description

Salutation Preference Joint

Is Anonymous

Primary Affiliation

Restricted Party Screening Alert

Extend Bell Tower Society Membership

Degree Information

Preferred Class Year Type Earliest Degree Year 0

Degree Year 0 Degree Count (School) 0

Preferred Class Year List of Degrees

Class Year 1

Class Year 2

Class Year 3

Additional Information

Donor ID 00940386 Account Name Scotty Highlander Household

Primary Constituent Type Alumni - Degreed Wealth Rating

Constituent Type Alumni - Degreed

Student Type Do Receive Household Soft Credit

Student Status Is Exclude From Household Name

Student Level Is Confidential

Stage of Readiness Is Solicitable

PRM Has Contact Information

NAVIGATE A CONSTITUENT RECORD PAGE

SERVICE INDICATORS

Service Indicators will quickly tell you if there is any special handling needed when communicating with a constituent.

Scotbe | Sign in

Scotty Highlander | Constituents

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D500001202mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egcencia Attain Partners Shar... BD Client Files - Go... Altain SF Lucid Riverside Conference Rochester Box Adobe Acrobat


Sandbox QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Search...

Star Settings Help User



View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386 Account Name Scotty Highlander Household

Phone Email

PRM Dubron Rabb LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotty is allergic to peanuts	Mar 5, 2025	

Overview

Constituent Details Prospect Management Our UCR Chatter

Name	Scotty Highlander	Is Name Overridden	
Recognition Name	Scotty Highlander, M.D.	Is Recognition Name Overridden	
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Heidi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous			
Primary Affiliation			
Restricted Party Screening Alert			
Extend Bell Tower Society Membership			

Degree Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

Additional Information

Donor ID	00940386	Account Name	Scotty Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	
Constituent Type	Alumni - Degreed		
Student Type		Do Receive Household Soft Credit	
Student Status		Is Exclude From Household Name	
Student Level		Is Confidential	
Stage of Readiness		Is Solicitable	
PRM	Dubron Rabb	Has Contact Information	

CONSTITUENT CARD

The constituent card is an easy way to see the constituent's phone number, email address, and Primary Relationship Manager (Relationship Coordinator).

Scotty Highlander | Constituent


flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D50000123mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egcencia Attain Partners Shar... 8D Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox QA | Log out

Search...

Lux Home Constituents Organizations Sessions Opportunities Reports Cases Addresses



View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow

Edit

Delete

Manage Household

Donor ID
00940386

Phone

PRM
Dubron Rabb

Account Name
Scotty Highlander Household

Email

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotty is allergic to peanuts	Mar 5, 2025	

Overview

Constituent Details

Prospect Management

Our UCR

Chatter

Name	Scotty Highlander	Is Name Overridden	
Recognition Name	Scotty Highlander, M.D.	Is Recognition Name Overridden	
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Hendi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous			
Primary Affiliation			
Restricted Party Screening Alert			
Extend Bell Tower Society Membership			

Degree Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

Additional Information

Donor ID	00940386	Account Name	Scotty Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	
Constituent Type	Alumni - Degreed		
Student Type		Do Receive Household Soft Credit	
Student Status		Is Exclude From Household Name	
Student Level		Is Confidential	
Stage of Readiness		Is Solicitable	
PRM	Dubron Rabb	Has Contact Information	

TRUSTEE INVOLVEMENTS

Highlights when the constituent is listed as a trustee on the UCRAA Board of Directors, Parent Philanthropy Ambassadors, or UCRF Board of Trustees

Scotty Highlander | Constituent


flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D50000123mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egcencia Attain Partners Shar... 8D Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox QA | Log out

Search...

Lux Home Constituents Organizations Sessions Opportunities Reports Cases Addresses



View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow

Edit

Delete

Manage Household

Donor ID
00940386

Phone

PRM
Dubron Rabb

Account Name
Scotty Highlander Household

Email

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotty is allergic to peanuts	Mar 5, 2025	

Overview

Constituent Details

Prospect Management

Our UCR

Chatter

Name	Scotty Highlander	Is Name Overridden	
Recognition Name	Scotty Highlander, M.D.	Is Recognition Name Overridden	
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Hendi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous			
Primary Affiliation			
Restricted Party Screening Alert			
Extend Bell Tower Society Membership			

Degree Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

Additional Information

Donor ID	00940386	Account Name	Scotty Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	
Constituent Type	Alumni - Degreed		
Student Type		Do Receive Household Soft Credit	
Student Status		Is Exclude From Household Name	
Student Level		Is Confidential	
Stage of Readiness		Is Solicitable	
PRM	Dubron Rabb	Has Contact Information	

NAVIGATE A CONSTITUENT RECORD PAGE

CONSTITUENT GIVING – TOP DESIGNATIONS

Highlights the funds that the constituent has donated to most frequently.

Scotbe | Sign in

Scotty Highlander | Constituents

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D500001202mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egcencia Altain Partners Shar... 8D Client Files - Go... Altain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386 Account Name Scotty Highlander Household Phone Email LinkedIn URL PRM Dabron Rabb

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

We can't draw this chart because there is no data.

View Report As of Today at 6:19 AM

Extend Bell Tower Society Membership

Degree Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

Additional Information

Donor ID	00940386	Account Name	Scotty Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	
Constituent Type	Alumni - Degreed		
Student Type		Do Receive Household Soft Credit	
Student Status		Is Exclude From Household Name	
Student Level		Is Confidential	
Stage of Readiness		Is Solicitable	
PRM	Dabron Rabb	Has Contact Information	

Birth / Death Information

Birth Month	October	Deceased Month	
Birth Day	10	Deceased Day	
Birth Year	1954	Deceased Year	
		Deceased Source	
Birthdate	10/10/1954	Is Deceased	
Age	70	Deceased Date	
Birthdate is This Month?		Date Marked Deceased	

Contact Information

Preferred Phone Type	Preferred Email Type
Mobile	Personal Email
Home Phone	Business Email
Asst. Phone	UCR Email
Business Phone	Asst. Email
Most Recent Phone	LinkedIn URL

OVERVIEW

Scotly Highlander


flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D500001202mgIAA/view

Parent Connect / Pa... Gmail Ulanet UKG HR Egenia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

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View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotly Highlander

+ Follow Edit Delete Manage Household

Account Name

Scotly Highlander Household

Email

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
Showing 0 to 0 of 0 record(s).			

Constituent Giving - Top Designations

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotly is allergic to peanuts	Mar 5, 2025	

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Name	Scotly Highlander	Is Name Overridden	
Recognition Name	Scotly Highlander, M.D.	Is Recognition Name Overridden	
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Heidi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous			
Primary Affiliation			
Restricted Party Screening Alert			
Extend Bell Tower Society Membership			

Degree Information

Additional Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

Donor ID	00940386	Account Name	Scotly Highlander Household
Primary Constituent Type	Alumni - Degreed	Wealth Rating	
Constituent Type	Alumni - Degreed		
Student Type		Do Receive Household Soft Credit	
Student Status		Is Exclude From Household Name	
Student Level		Is Confidential	
Stage of Readiness		Is Solicitable	
PRM	Dubron Rabb	Has Contact Information	

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- Organizations
- Sessions
- Opportunities
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CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow

Edit

Delete

Manage Household

Donor ID

00940386

Phone

Account Name

Scotty & Heidi Highlander Household

Email

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotty is allergic to peanuts	Mar 5, 2025	

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Sort by:

Most Recent Activity

Phone Call

Phone Call — Jennifer Best created a task.
July 28, 2025 at 6:40 AM

Phone Call

View more details

Like
 Comment

Write a comment...

Follow up — Josh Carter created a task.
June 10, 2025 at 4:37 PM

Follow up

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CONSTITUENT DETAILS

CONSTITUENT DETAILS

GIVING DETAILS

A summary of the constituent’s lifetime giving. Click on any record hyperlink to access that gift’s record page.

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Scotty Highlander

+ Follow

Edit

Manage Household

Manage Profile Picture

Donor ID

01903304

Account Name

Scotty Highlander Household

Phone

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

<< < > >>

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Sum of Credit Amount

06001.2k1.8k2.4k3k

Athletics: Volleyball2.9k

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Apply Filter

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Giving Totals

	Fundraising	Cash
Lifetime		
Campaign		

Pledges / Recurring Gift Commitments

	Amount	Date	Unit
First			
Largest			
Most Recent			

Pledge Payments

	Amount	Date	Unit
First			
Largest			
Most Recent			

Gifts

	Amount	Date	Unit
First			
Largest			
Most Recent			

GIFT NO.	PLEDGE / GIFT ID	CREDIT DATE	GIFT TYPE	PLEDGE / GIFT STATUS	AMOUNT	REMAINING BALANCE	RECEIPT AMOUNT	DESIGNATION ID	DESIGNATION	DESIGNATION TYPE	HARD CREDIT	SOFT CREDIT SUB-TYPE	ANON
GN0700311		Sep 17, 2025	Outright Gift	Funded	\$2,913.30	\$0.00		200069	Athletics: Volleyball	Foundation		Scotty Highlander	<input type="checkbox"/>

<< < 1 > >>

Showing 1 to 1 of 1 record(s).
Results are aggregated from 1 hard/soft credit record(s).

NAMES

A list of all current and former names that the constituent has used. Note: maiden names are considered former names in *ascend*.

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Manage Household

Donor ID

01903304

Phone

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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PREFIX	FIRST NAME	LAST NAME	MIDDLE NAME	TYPE	SUFFIX	PROFESSIONAL DESIGNATION	DATA SOURCE	CONSTITUENT NAME ID	ACTIONS
	Scotty	Highlander		Full Name			MyUCR - incoming parent	N-1660261	

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Showing 1 to 1 of 1 record(s).

CONSTITUENT DETAILS

SALUTATIONS

A list of all of the ways that we can address the constituent when communicating with them. Different salutations will be used for different circumstances.

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Donor ID

01903304

Phone

PRM

Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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INSIDE SALUTATION	ADDRESSEE LINE 1	ADDRESSEE LINE 2	ADDRESSEE LINE 3	SALUTATION TYPE	SALUTATION AUTHOR	EDITABLE	SALUTATION NAME	ACTIONS
Scotty	Scotty Highlander			Formal	UCR Standard	<input type="checkbox"/>	SAL-6943823	<div>✎</div>
Scotty				Informal	UCR Standard	<input type="checkbox"/>	SAL-6943824	<div>✎</div>

<< < 1 > >>

Showing 1 to 2 of 2 record(s).

CONSTITUENT DETAILS

ADDRESSES

A list of all current and former addresses associated with the constituent. If an address is marked preferred, we will also use that record as the mailing address.

A seasonal address is one that a constituent uses for part of the year. We can mark the time that a constituent is using their seasonal address and the system will mark that address preferred for the time that the constituent is there.

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Scotty Highlander

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Manage Household

Donor ID

01903304

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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ADDRESS	STATUS	IS PREFERRED	FULL ADDRESS	TYPE	START DATE	END DATE	HOUSEHOLD	CREATED DATE	ADDRESS RELATION NAME	ACTIONS
ADDR-5607570	Current	<input checked="" type="checkbox"/>	1235 Mission Street San...	Home				Jun 26, 2025	AR-3012576	<div>✎</div>

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Showing 1 to 1 of 1 record(s).

PHONES

A list of all current and former phone numbers associated with the constituent. If a phone number is marked 'Suspect', we have not been able to confirm that the phone number is associated with the constituent. If a phone number is marked 'Bad', we have determined that the phone number is not associated with the constituent and should not be used.

The screenshot displays the LUX system's user interface. At the top, there is a navigation bar with the LUX logo, a search bar, and various utility icons. Below this is a secondary navigation menu with options like Home, Constituents, Organizations, Sessions, Opportunities, Reports, and Cases. The main content area is divided into two columns. The left column features a sidebar with a back button, a profile picture placeholder, a 'View Critical Information' button, and sections for 'CONSTITUENT INDICATORS' and 'Trustee Involvements'. The right column shows the 'Constituent Details' view for 'Scotty Highlander'. This view includes tabs for Giving Details, Names, Salutations, Addresses, Phones (highlighted with a red box), Emails, Social Media, Affiliations, and More. Under the 'Phones' tab, there is a table with headers: PHONE NUMBER, STATUS, IS PREFERRED, TYPE, SUSPECT PHONE, BAD PHONE, DATA SOURCE, LAST MODIFIED DATE, and ACTIONS. The table currently shows no records. To the right of the table are pagination controls and a status message 'Showing 0 to 0 of 0 record(s)'. A 'New' button with a plus icon is also present.

EMAILS

A list of all current and former email addresses associated with the constituent. If an email address is marked 'Suspect', we have not been able to confirm that the email address is associated with the constituent. If an email address is marked 'Bad', we have determined that the email address is not associated with the constituent and should not be used.

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Scotty Highlander

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Manage Household

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Donor ID

01903304

Account Name

Scotty Highlander Household

Phone

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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Emails

EMAIL ADDRESS	STATUS	IS PREFERRED	TYPE	SUSPECT EMAIL	BAD EMAIL	LAST MODIFIED DATE	ACTIONS
rtbobo@attainpartners.com	Current	<input checked="" type="checkbox"/>	Personal	<input type="checkbox"/>	<input type="checkbox"/>	Jun 26, 2025	

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Showing 1 to 1 of 1 record(s).

CONSTITUENT DETAILS

SOCIAL MEDIA

A list of all current and former social media handles associated with the constituent.

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Donor ID

01903304

Phone

PRM

Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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SOCIAL MEDIA NAME	NOTES	PLATFORM	SOCIAL HANDLE	URL	VIEW	ACTIONS
-------------------	-------	----------	---------------	-----	------	---------

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Showing 0 to 0 of 0 record(s).

CONSTITUENT DETAILS

AFFILIATIONS

A list of all of the organizations that the constituent is linked to. Affiliations are reciprocal, which means that if you enter an affiliation on the constituent's record page, the affiliation will also appear on the organization's record page.

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01903304

Phone

PRM

Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

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TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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ORGANIZATION	ORGANIZATION ROLE	STATUS	IS PRIMARY CONTACT	IS DONOR CONTROL	START DATE	END DATE	AFFILIATION NAME	ACTIONS
Merck Foundation	Employer	Current	<input type="checkbox"/>	<input type="checkbox"/>			AF-0049148	<div>✎</div>

<< < 1 > >>

Showing 1 to 1 of 1 record(s).

CONSTITUENT DETAILS

RELATIONSHIPS

A list of all of the other constituents in Lux that the constituent is linked to. Relationships are reciprocal, which means that if you enter a relationship with a constituent on one constituent’s record page, it will show up on the other constituent’s record page, too.

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Scotty Highlander

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Manage Profile Picture

Donor ID

01903304

Account Name

Scotty Highlander Household

Phone

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

Constituent Giving - Top Designations

Sum of Credit Amount

Athletics: Volleyball

2.9k

Thomas Haider Clinical Award of Excellence E...

120

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RELATED CONSTITUENT	RELATED CONSTITUENT ROLE	RELATED CONSTITUENT DONOR ID	RECORD ID	ACTIONS
---------------------	--------------------------	------------------------------	-----------	---------

Showing 0 to 0 of 0 record(s).

Relationship Map (Constituent Relationships)

Displaying 1 of 600 nodes; displaying 0 of 3 levels.

Scotty Highlander

CONSTITUENT DETAILS

FUNDING INTERESTS

A list of topics that the constituent has expressed interest in. To see all of the funding interests in the system, type ‘Funding Interest Values’ into the App Launcher, then select the ‘All Funding Interest Values’ list view.

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01903304

Account Name

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rtbobo@attainpartners.com

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Richard Bobo

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Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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FUNDING INTEREST	FUNDING INTEREST ID	START DATE	END DATE	CREATED BY
------------------	---------------------	------------	----------	------------

Showing 0 to 0 of 0 record(s).

CONSTITUENT DETAILS

DEGREE INFORMATION

A list of all degrees, both from Riverside and other institutions, that a constituent holds.

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101903304

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Scotty Highlander Household

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Email

rtbobo@attainpartners.com

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Richard Bobo

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Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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Degree Information

DEGREE INSTITUTION	CONFERRED DEGREE YEAR	IS PREFERRED	DEGREE	MAJOR	SECOND MAJOR	MINOR	STUDENT STATUS	NAME
--------------------	-----------------------	--------------	--------	-------	--------------	-------	----------------	------

<< < > >>

Showing 0 to 0 of 0 record(s).

STEWARDSHIP

To learn more about this tab, see the Stewardship and Membership Training!

[illegible]

CONSTITUENT DETAILS

INVOLVEMENTS

A list of connections that the constituent has with Riverside in a club, association or committee capacity. To see all of the involvements in the system, type 'Involvement Values' into the App Launcher, then select the 'All Involvement Values' list view.

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Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

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Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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INVOLVEMENT CODE	INVOLVEMENT TYPE	ROLE	START DATE	END DATE	AWARD / HONOR REC'D DATE	INVOLVEMENT CODE	INVOLVEMENT NAME	ACTIONS
------------------	------------------	------	------------	----------	--------------------------	------------------	------------------	---------

<< < > >>

Showing 0 to 0 of 0 record(s).

CONSTITUENT DETAILS

SERVICE INDICATORS

A list of all special handling we must consider when communicating with the constituent. You may also see the service indicators on the constituent record homepage.

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Richard Bobo

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rtbobo@attainpartners.com

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Trustee Involvements

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SERVICE INDICATOR VALUE	CONSENT CHANNEL	CONSENT RESPONSE	START DATE	END DATE	SERVICE INDICATOR NAME	ACTIONS
-------------------------	-----------------	------------------	------------	----------	------------------------	---------

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rtbobo@attainpartners.com

PRM

Richard Bobo

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Trustee Involvements

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SOCIETY MEMBERSHIP NAME	GIVING SOCIETY NAME	MEMBERSHIP LEVEL	PURCHASED MEMBERSHIP LEVEL	ANNIVERSARY DATE	EXPIRATION DATE	ACTIONS
Showing 0 to 0 of 0 record(s).						

👤

Lapsed/Dropped/Inactive Memberships

🔄

SOCIETY MEMBERSHIP NAME	GIVING SOCIETY NAME	MEMBERSHIP LEVEL	PURCHASED MEMBERSHIP LEVEL	ANNIVERSARY DATE	EXPIRATION DATE	ACTIONS
Showing 0 to 0 of 0 record(s).						

CONSTITUENT DETAILS

CONTACT MATCHES

If the constituent’s record matches another constituent record closely, that potential match will be listed here. If it is determined that the records are the same, they can be combined.

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Scotty Highlander

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Donor ID

01903304

Phone

PRM

👤 Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
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No constituent duplicates found.

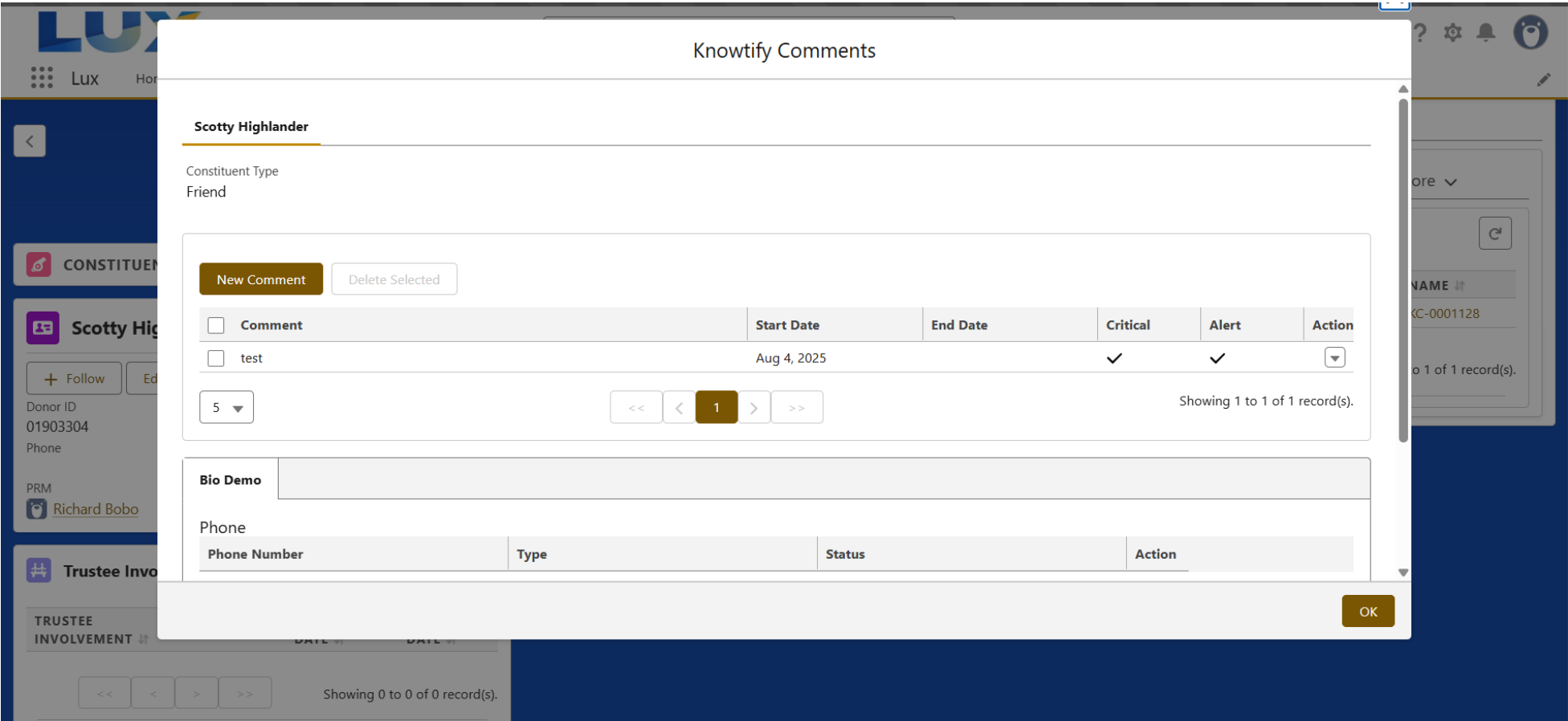
🚫

We found no potential duplicates of this Constituent.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

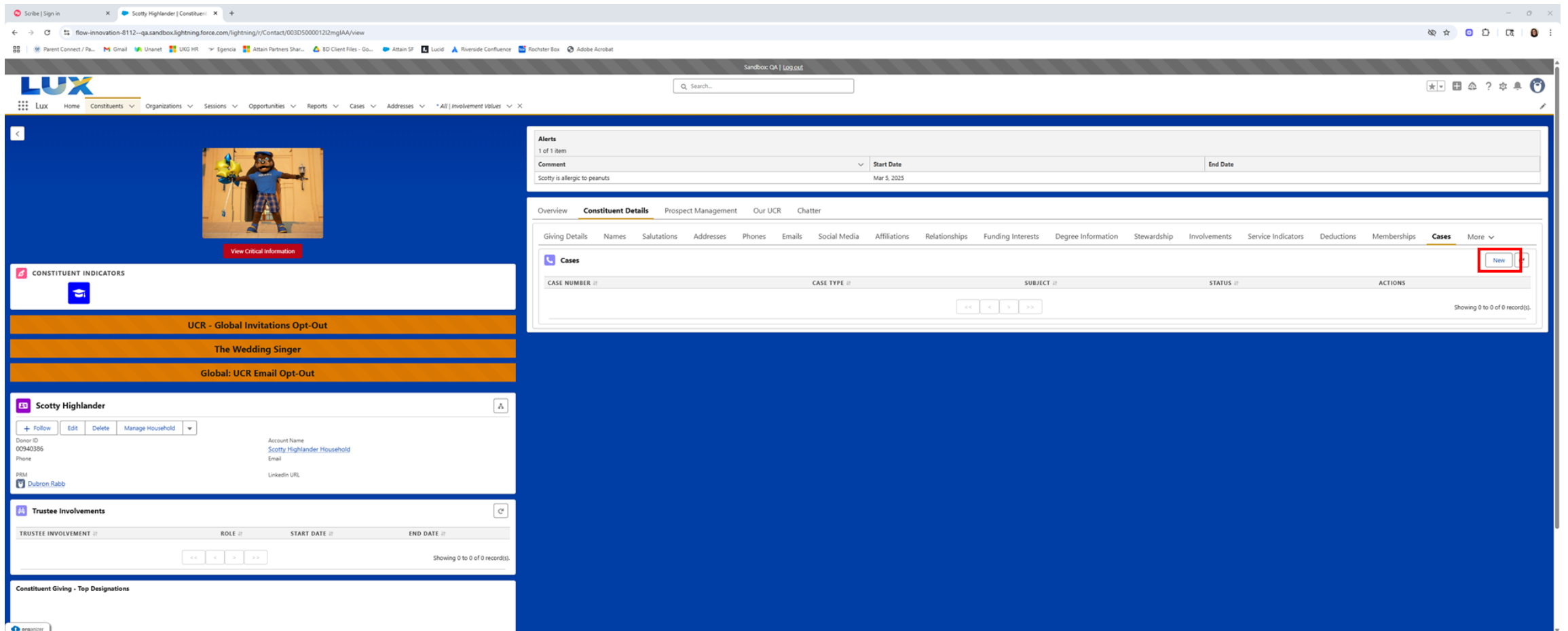
KNOWTIFY COMMENTS

A list of all Knowtify comments and alerts that have been added to the constituent's record page. You can also see Knowtify alerts at the top of the constituent's record page and by clicking 'View Critical Alerts' on the record's homepage.



CASES

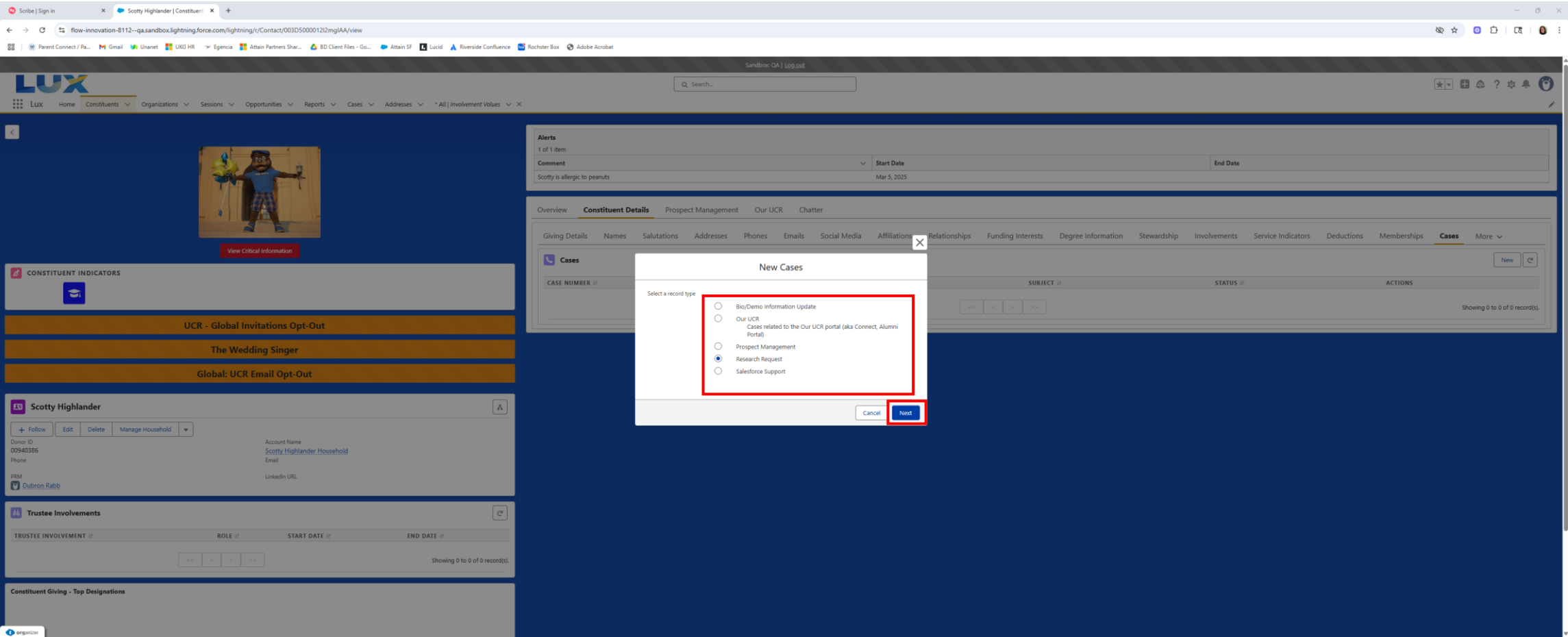
A list of all cases that have been submitted on behalf of the constituent.
To create a new case, click New.



CONSTITUENT DETAILS

CASES

Select the type of case that you want to submit, then click Next.

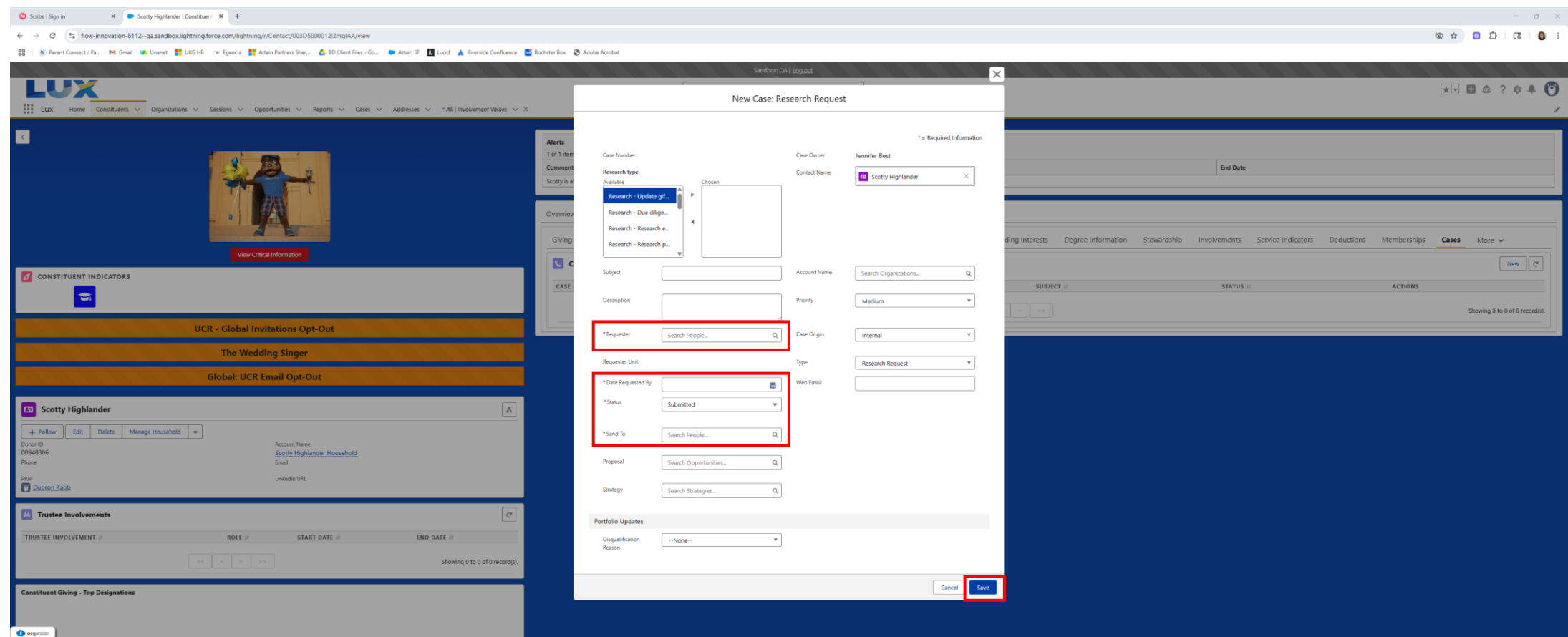


CONSTITUENT DETAILS

CASES

Based on the type of case you select, you will be prompted to fill out different fields. Complete the required fields (indicated with red asterisks) and add any other information you have, then click Save.

The case will be sent to the team that can help you with your request. To check in on your case, you can access its record page at any time. Once the case has been resolved, you'll receive a notification.



CONSTITUENT DETAILS

CAMPAIGN HISTORY

A list of all campaigns that the constituent has been part of.

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View Critical Information

🔗

CONSTITUENT INDICATORS

👤

Scotty Highlander

⌵

+ Follow

Edit

Manage Household

⌵

Donor ID

01903304

Phone

PRM

👤 Richard Bobo

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

LinkedIn URL

👥

Trustee Involvements

🔄

TRUSTEE INVOLVEMENT ⌵⌴	ROLE ⌵⌴	START DATE ⌵⌴	END DATE ⌵⌴
------------------------	---------	---------------	-------------

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Showing 0 to 0 of 0 record(s).

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Campaign History (0)

Add to Campaign

CONSTITUENT DETAILS

MATCHING GIFTS

A list of all gifts that a constituent has made and their employer has matched

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View Critical Information

CONSTITUENT INDICATORS

Scotty Highlander

+ Follow

Edit

Manage Household

Donor ID

01903304

Account Name

Scotty Highlander Household

Email

rtbobo@attainpartners.com

PRM

Richard Bobo

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

Showing 0 to 0 of 0 record(s).

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Matching Gifts

MATCHING GIFT ID	STAGE	AMOUNT	AMOUNT PAID TO DATE	MATCHING ORGANIZATION
------------------	-------	--------	---------------------	-----------------------

<< < > >>

Showing 0 to 0 of 0 record(s).

DIRECTORY SETTINGS

Directory Settings are where a portal users settings are managed. They will always be auto-created and will only be updated by a Portal User when they change settings in My Information.

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👤

Scotty Highlander

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Manage Household

Donor ID

01903304

Account Name

Scotty Highlander Household

Phone

Email

rtbobo@attainpartners.com

PRM

👤

Richard Bobo

LinkedIn URL

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
Showing 0 to 0 of 0 record(s).			

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Directory Setting Details

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Link a related record.

🔍

Search Directory Settings...

⚙️

Directory Settings (0)

CONSTITUENT DETAILS

ZONE MEMBERSHIPS

Zone Members = Memberships to alumni Regional Networks or Affinities Groups. Zones are the actual Clubs (Los Angeles Regional Network), and the Zone Members is the junction object associating a Constituent to the Zone (club).

Search...

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Lux

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🔍

CONSTITUENT INDICATORS

👤

Scotty Highlander

+ Follow

Edit

Manage Household

Donor ID

01903304

Account Name

Scotty Highlander Household

Phone

Email

rtbobo@attainpartners.com

PRM

👤

Richard Bobo

LinkedIn URL

👥

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

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Showing 0 to 0 of 0 record(s).

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Zone Memberships (0)

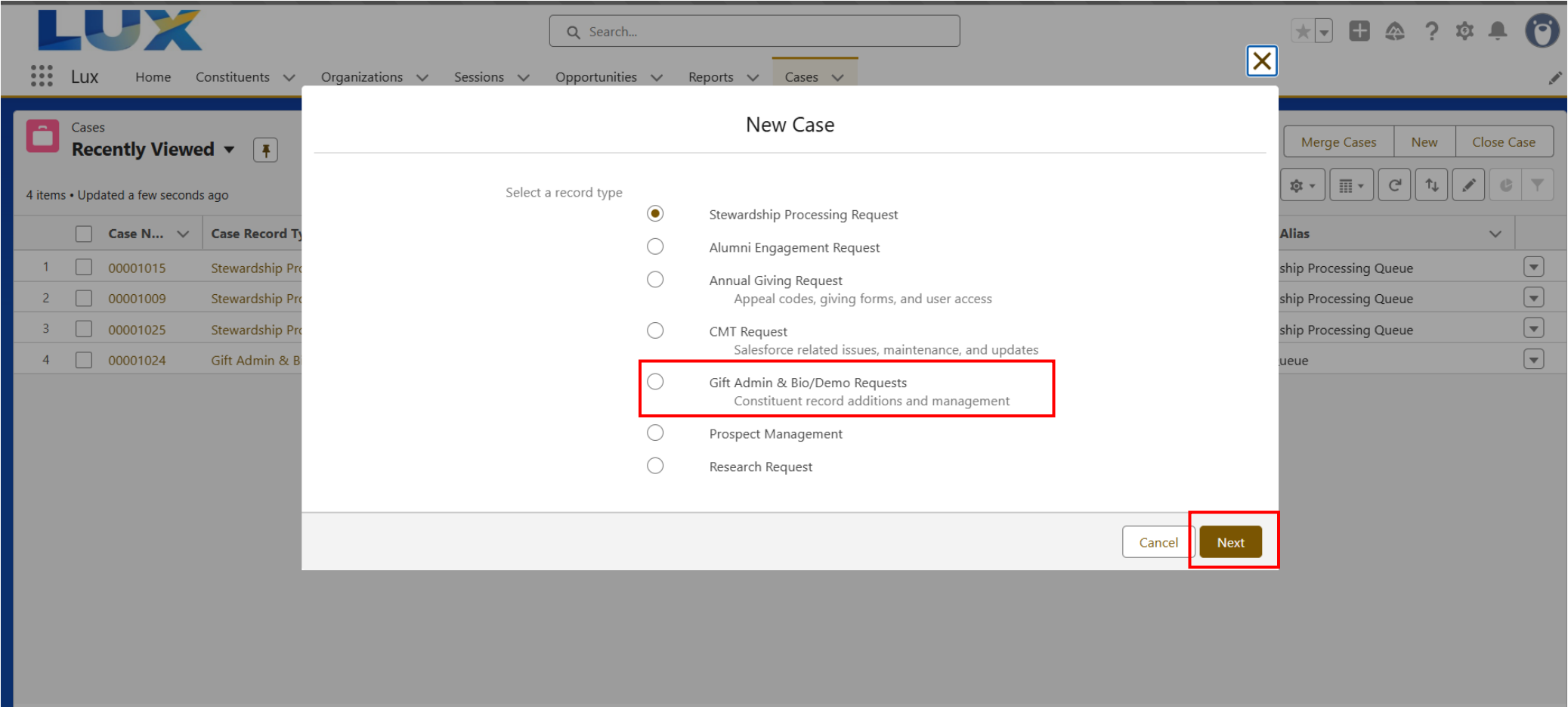
BIO DEMO UPDATE REQUEST

The screenshot displays the Lux CRM interface. At the top, a navigation bar includes the Lux logo, a search bar with "Scotty Highlander", and various utility icons. Below the navigation bar, a sidebar on the left contains a menu with "Lux", "Home", "Constituents", "Organizations", "Sessions", "Opportunities", "Reports", "Cases", and "Recently Viewed | Work". A red box highlights the "App Launcher" dropdown menu, which shows a search bar for "Cases" and sections for "Apps", "Items", and "Cases", with a "View All" link at the bottom. The main content area is divided into two columns. The left column features a "View Critical Information" button and a "CONSTITUENT INDICATORS" section with icons for a graduation cap and a gift. Below this are three orange buttons: "UCR - Global Invitations Opt-Out", "The Wedding Singer", and "Global: UCR Email Opt-Out". The right column shows an "Alerts" section with one item: "Scotty is allergic to peanuts" dated "Mar 5, 2025". Below the alerts is a "Chatter" section with tabs for "Overview", "Constituent Details", "Prospect Management", "Our UCR", and "Chatter". The "Chatter" tab is active, showing a post by "Jennifer Best" dated "July 28, 2025 at 6:40 AM" with the subject "Phone Call". The post includes a "Share" button and a "Sort by: Most Recent Activity" dropdown. Below the post is a "Write a comment..." input field and a "Like" button. At the bottom of the page, a profile card for "Scotty Highlander" is visible, showing a "Follow" button and account details.

You can also use Global Search or find Cases under the Support Requests tab under a specific Constituent or Organization.

BIO DEMO UPDATE REQUEST

3. Select Bio/Demo Update Request from the list, then select Next.



BIO DEMO UPDATE REQUEST

[illegible]

The Status of the case shows at the bar on the top of the record. Here will can see the Status highlighted as 'New.'

6

MANAGE HOUSEHOLD

MANAGE HOUSEHOLD

Households are made up of married constituents or constituents in a domestic partnership who reside at the same home address. To manage a household, click Manage Household in the Household Card. (You may also click Manage Household from the household members' record pages!)

The screenshot displays the LUX system interface for the 'Scotty Highlander Household'. The browser address bar shows the URL: `flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Account/001D500001RZ9yDIAT/view`. The LUX logo is in the top left, and a search bar is in the top right. The navigation menu includes: Home, Constituents, Organizations (selected), Sessions, Opportunities, Reports, Cases, Addresses, and Expedited Gift Processing. The main content area is divided into two columns. The left column contains a 'Scotty Highlander Household' card with buttons for '+ Follow', 'Edit', 'Delete', and 'Manage Household' (highlighted with a red box). Below this card is a 'Trustee Involvements' table with columns: CONSTITUENT, TRUSTEE INVOLVEMENT, ROLE, START DATE, and END DATE. The right column contains an 'Overview' tab with various fields: Account Name (Scotty Highlander Household), Number of Household Members (1), Receipt Type, Gives Anonymously, Primary Constituent (Scotty Highlander), Is Primary Constituent Logic Overridden, Is Household Name Overridden, Donor ID (00940387), Stage of Readiness, PRM (Dubron Rabb), Work Plan, Wealth Rating, Description, Total Campaign Fundraising, Lifetime Fundraising, Lifetime Cash, Campaign Total Cash, Giving Summary Last Updated, Has Planned Gift?, Planned Gifts (0), Date of First Pledge, Amount of First Pledge, Designation of First Pledge, Appeal of First Pledge, and Unit of First Pledge.

MANAGE HOUSEHOLD

You will be redirected to the Manage Household screen. From here, you can add constituents to a household, remove constituents from a household, apply soft credit for gifts, and change the household’s name.

Aura

flow-innovation-8112--qa.sandbox.lightning.force.com/ucinn_ascendv2/ManageHouseholdApp.app?hhid=001D500001RZ9yDIAT

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

HOUSEHOLD > SCOTTY & HEIDI HIGHLANDER HOUSEHOLD

Manage Household

Cancel Save

HOUSEHOLD MEMBERS

☐ All members receive Soft credit?

Scotty Highlander

900 North Point Street
San Francisco, CA 94109
United States

RELATIONSHIPS:
Heidi Highlander, Spouse
Edward William Scissorhands Jr., Manager

☐ Receive Household Soft Credit?

EXCLUDE FROM:
☐ Household Name

Heidi Highlander

RELATIONSHIPS:
Scotty Highlander, Spouse

☒ Receive Household Soft Credit?

EXCLUDE FROM:
☐ Household Name

Find a Constituent or add a new Constituent to the Household

HOUSEHOLD DETAILS

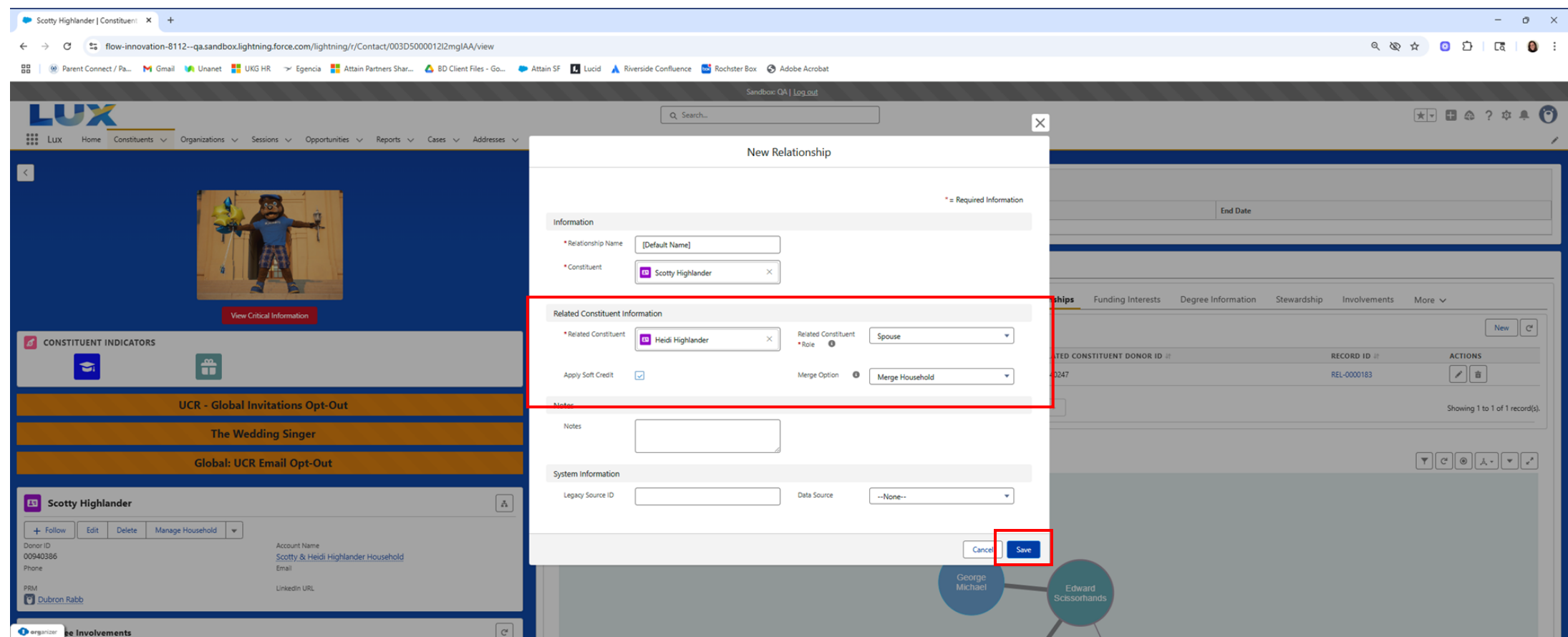
Household Name*

Scotty & Heidi Highlander Household

organizer

MANAGE HOUSEHOLD

If two constituents get married or move in together after they both have records in the system, you can merge their households when you are adding their relationship record. You must only add the relationship to one constituent's record, as relationships are reciprocal and will be added to both constituents' records. Once finished, click Save.



7

DUPLICATE RECORDS

DUPLICATE RECORDS

If there are constituent or organization records in the system that are close matches, you will see the potential matches in the Contact Matches subtab under the Constituent/Organization details tab. The score compares the names, email addresses, phone numbers, and various other data points to show how close of a match the records are. To review the potential match, click View Duplicates.

Scotty Highlander | Constituent

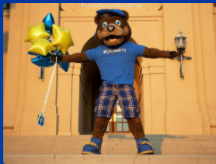
flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000012I2mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out


LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Expedited Gift Processing (...)



View Critical Information

CONSTITUENT INDICATORS



UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386
Phone
PRM
Dubron Rabb

Account Name
Scotty Highlander Household
Email
LinkedIn URL

Alerts

1 of 1 item

Comment

Start Date

End Date

Scotty is allergic to peanuts Mar 5, 2025

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Possible Duplicates

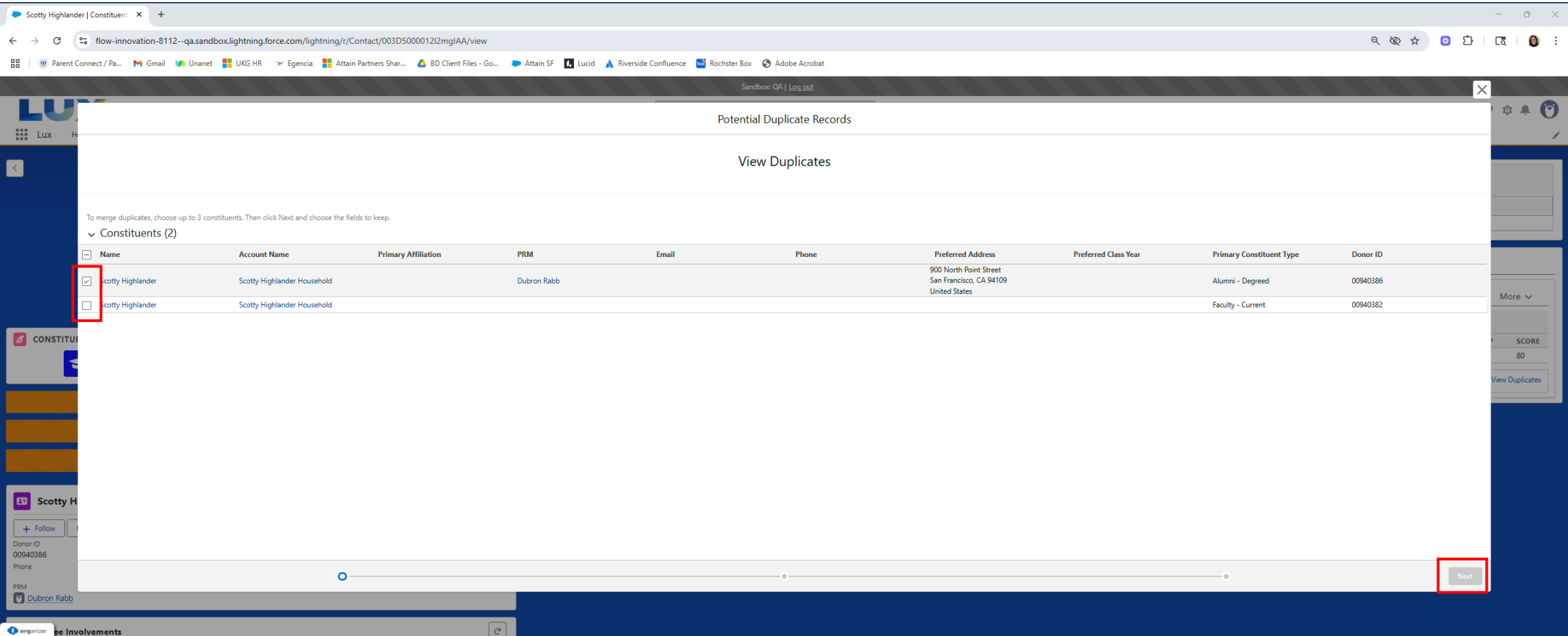
CURRENT DONOR	CURRENT NAME	CURRENT PHONE	CURRENT EMAIL	CURRENT MAILING ZIP	POSSIBLE MATCH ID	POSSIBLE MATCH NAME	POSSIBLE MATCH PHONE	POSSIBLE MATCH EMAIL	POSSIBLE MATCH MAILING ZIP	SCORE
00940386	Scotty Highlander			94109	00940382	Scotty Highlander				80

We found 1 potential duplicate of this Constituent.

View Duplicates

DUPLICATE RECORDS

A popup will appear. Select the records you wish to compare by checking the boxes next to the constituents' names, then click Next.



DUPLICATE RECORDS

Review the data shown on the screen and select the data points that are correct and should appear on the merged record. If one record is fully correct, you can check Select All at the top of the column. Click Next.

Scotty Highlander | Constituents

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000012I2mgIAA/view

Sandbox: QA | Log out

Potential Duplicate Records

Compare constituents

When you merge, the principal record is updated with the values you choose, and relationships to other items are shifted to the principal record.

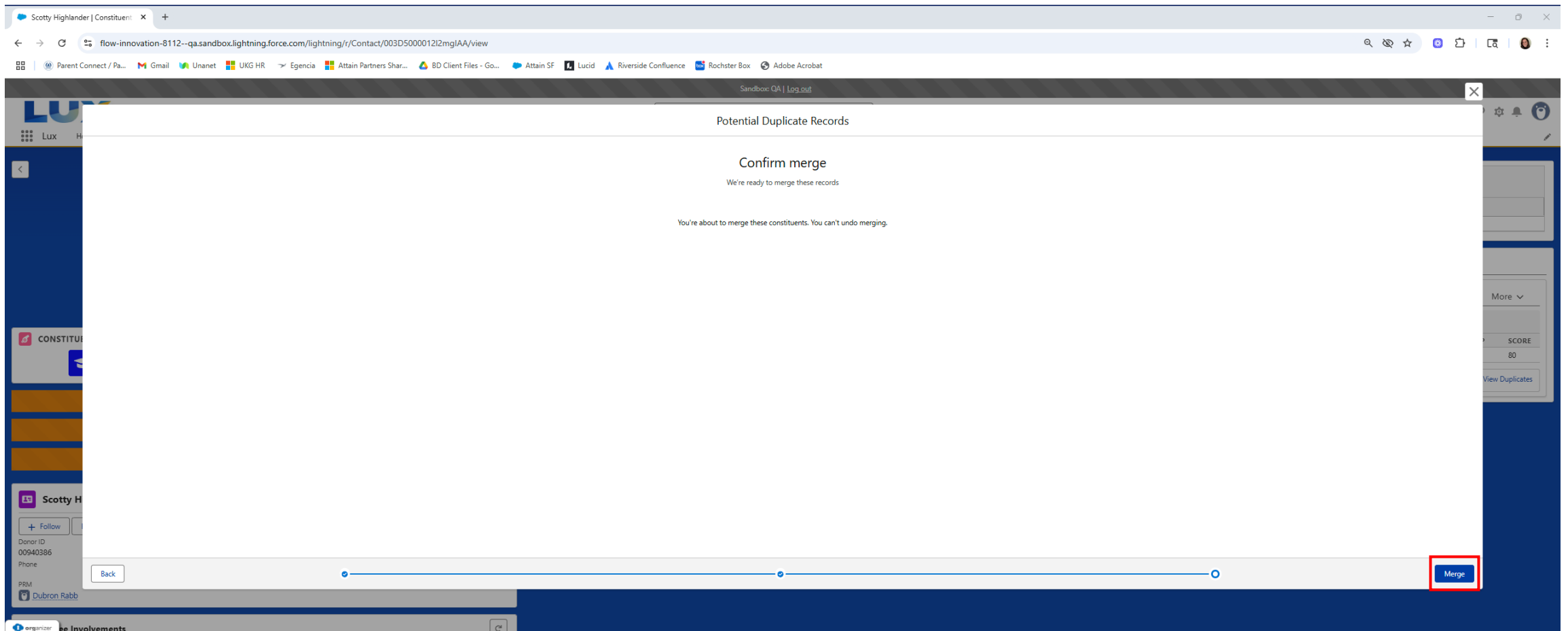
PRINCIPAL RECORD	Scotty Highlander Select All	Scotty Highlander Select All
	<input checked="" type="radio"/> Use as principal	<input type="radio"/> Use as principal
RECOGNITION NAME	<input checked="" type="radio"/> Scotty Highlander, M.D.	<input type="radio"/> Scotty Highlander
PRONOUNS	<input checked="" type="radio"/> He/Him	<input type="radio"/> [empty]
GENDER	<input checked="" type="radio"/> Man	<input type="radio"/> [empty]
PROFESSIONAL DESIGNATION	<input checked="" type="radio"/> M.D.	<input type="radio"/> [empty]
RACE/ETHNICITY	<input checked="" type="radio"/> Other	<input type="radio"/> [empty]
MARITAL STATUS	<input checked="" type="radio"/> Married	<input type="radio"/> [empty]
SPOUSE	<input checked="" type="radio"/> Heidi Highlander	<input type="radio"/> [empty]
SALUTATION PREFERENCE	<input checked="" type="radio"/> Joint	<input type="radio"/> Individual
DONOR ID	<input checked="" type="radio"/> 00940386	<input type="radio"/> 00940382
ACCOUNT NAME	<input checked="" type="radio"/> Scotty Highlander Household	<input type="radio"/> Scotty Highlander Household
PRIMARY CONSTITUENT TYPE	<input checked="" type="radio"/> Alumni - Degreed	<input type="radio"/> Faculty - Current
CONSTITUENT TYPE	<input checked="" type="radio"/> Alumni - Degreed	<input type="radio"/> Faculty - Current
PRM	<input checked="" type="radio"/> Dubron Rabb	<input type="radio"/> [empty]

Back

Next

DUPLICATE RECORDS

To ensure we are not accidentally merging records that are not the same, you will be asked to confirm the merge. If you wish to proceed, click Merge.



DUPLICATE RECORDS

If successful, you will notice a popup at the top of the record page that confirms the merge.

Scotty Highlander | Constituents

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000012I2mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

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Star Plus Question Settings Bell Profile

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View Critical Information

CONSTITUENT INDICATORS

UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386

Phone

PRM Dubron Rabb

Account Name Scotty Highlander Household

Email

LinkedIn URL

organizer

be Involvements

Alerts

1 of 1 item

Comment	Start Date	End Date
Scotty is allergic to peanuts	Mar 5, 2025	

Overview

Constituent Details Prospect Management Our UCR Chatter

Name	Scotty Highlander	Is Name Overridden	<input type="checkbox"/>
Recognition Name	Scotty Highlander, M.D.	Is Recognition Name Overridden	<input type="checkbox"/>
Pronouns	He/Him	Gender	Man
Professional Designation	M.D.	Race/Ethnicity	Other
Marital Status	Married	Religious Preference	
Spouse	Heidi Highlander	Description	
Salutation Preference	Joint		
Is Anonymous	<input type="checkbox"/>		
Primary Affiliation			
Restricted Party Screening Alert	<input type="checkbox"/>		
Extend Bell Tower Society Membership	<input type="checkbox"/>		

▼ Degree Information

Preferred Class Year Type		Earliest Degree Year	0
Degree Year	0	Degree Count (School)	0
Preferred Class Year		List of Degrees	
		Class Year 1	
		Class Year 2	
		Class Year 3	

▼ Additional Information

DUPLICATE RECORDS

If the system senses a duplicate record while you're creating a new constituent, you will receive a notification in the new constituent screen as soon as the match hits a certain score. To review the potential match, click View Duplicates.

The screenshot shows the 'New Constituent: Constituent' form in the LUX system. The form is partially filled out with the following information:

- Name:** Salutation: --None-- (dropdown), First Name: Scotty, Middle Name: (empty), Last Name: Highlander, Suffix: (empty).
- Recognition Name:** (empty)
- Pronouns:** --None-- (dropdown)
- Gender:** --None-- (dropdown)
- Professional Designation:** Available: CLU, CPA, D.D.S., D.M.D.; Chosen: (empty).
- Race/Ethnicity:** Available: Black/African American, Asian, American Indian, Native Hawaiian/Other...; Chosen: (empty).
- Marital Status:** (empty)
- Description:** (empty)

A warning box titled 'Similar Records Exist' is overlaid on the form, indicating a potential duplicate. The message reads: 'This record looks like an existing record. Make sure to check any potential duplicate records before saving.' and includes a link to 'View Duplicates'.

The form also includes a 'Is Name Overridden' checkbox (unchecked), a 'Is Recognition Name Overridden' checkbox (unchecked), and a 'Is Anonymous' checkbox (unchecked). The bottom of the form has 'Cancel', 'Save & New', and 'Save' buttons.

DUPLICATE RECORDS


To see if there is already a record for the constituent you're trying to create, click Open This Constituent and enter any new information into the existing record.

The screenshot shows a web browser window with the LUX system interface. The main window is titled "New Constituent: Constituent". A modal window titled "View Duplicates" is open, displaying a warning message: "The record you're about to create looks like a duplicate. Open an existing record instead?". Below the message, a table lists a constituent named "Scotty Highlander". The table includes fields for Name, Account Name, Primary Affiliation, PRM, Email, Phone, Preferred Address, Preferred Class Year, Primary Constituent Type, and Donor ID. A red box highlights the "Open This Constituent" button at the bottom of the table. In the background, a tooltip message is visible: "This record looks like an existing record. Make sure to check any potential duplicate records before saving. View Duplicates". The tooltip also shows a "Cancel" button and a "Save & New" button.

View Duplicates

The record you're about to create looks like a duplicate. Open an existing record instead?

CONSTITUENT (1)

	Scotty Highlander Constituent
Name:	Scotty Highlander
Account Name:	Scotty & Heidi Highlander Household
Primary Affiliation:	Dubron Rabb
PRM:	
Email:	
Phone:	
Preferred Address:	900 North Point Street San Francisco, CA 94109 United States
Preferred Class Year:	Alumni - Degreed
Primary Constituent Type:	
Donor ID:	00940386

Open This Constituent

This record looks like an existing record. Make sure to check any potential duplicate records before saving.
[View Duplicates](#)

Cancel Save & New Save



8

MOBILE APP

MOBILE APP

The Salesforce mobile app is available for all Lux users to download. Please refer to the Mobile App 101 training in the LMS for more detail.

