

# Batch and Import Guide

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# Batch and Import: The Big Picture

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Effective time and data management are integral to the success of your organization. When your efforts are streamlined and consistent, you can devote more time to your organization's mission and goals.

In this guide, we outline two powerful tools for data management: *Batch* and *Import*.

With *Batch*, you can add or update multiple records in your database at once. This is an efficient alternative to working with records individually and saves time. When you work with records in bulk, you eliminate the need to open and work with each individual record. For example, when you have similar information such as a group of volunteer timesheets from Saturday's Walk-A-Thon, it is much easier to add that information to your database in a group format using a timesheet batch.

A batch has the look and feel of a spreadsheet and can contain as few or as many fields as you need. When you commit (apply and save) the batch to your database, a record is created for each row of data you entered in the batch spreadsheet. When rows include edits to existing records, upon committal, those records are updated in your database.

*Import* is a tool that relies heavily on *Batch* and helps you manage external data that you want to add to your database. For example, using a spreadsheet, you gathered a large amount of information about potential donors including names, addresses, and other related data. It is logical to bring this data into your database, in bulk, using a batch. Together, *Batch* and *Import* can help you organize and work with large amounts of data, which saves time and promotes a consistent workflow.

**Show Me:** [Watch this video for a high-level overview of Batch](#)

**Show Me:** [Watch this video for a high-level overview of Import](#)

## Full Circle View

*Batch* is divided into three main areas: **Batch entry**, **Batch search**, and **Commit multiple batches**. To access *Batch*, click **Batch** from *Administration*. From the Batch page that displays, you can access the three areas and the associated tasks.

**Note:** You can also access **Batch entry** and **Batch search** from *Revenue*, *Constituents*, and *Volunteers*. These are the areas where it makes sense to enter data in a batch format and search for existing batches.

*Import* is located in *Administration*. While *Import* can be accessed from *Administration*, you can also access import tasks directly from *Batch*.

### > Batch Entry

From **Batch entry**, you can access several configuration tasks to ensure a consistent environment for your batch processes. Before you create and manage batches, you must first specify batch numbering schemes, workflows, and templates. For more information about these configuration tasks, see [Batch Configuration on page 18](#).

Once you complete the necessary configuration options, you can begin to create and manage batches using the Uncommitted Batches and Committed Batches tabs. For information about these tabs and the tasks associated with them, see [Batch Entry on page 52](#).

**Tip:** Several reports are available to help you track the records entered in a batch and correct the exceptions generated when you commit a batch. For more information, see [Batch Entry Reports on page 149](#).

### > Batch Search

From **Batch search**, you can search for and open a batch. Before you create and manage batches, we recommend you search for a batch to see if it already exists. You can use **Batch search** in *Administration* or from the action bar on the Batch Entry page. For more information, see [Batch Search on page 66](#).

### > Commit Multiple Batches

From **Commit Multiple Batches**, you can create and manage processes to automatically commit multiple batches at once. For more information, see [Commit Multiple Batches on page 104](#).

### > Import

*Import* relies heavily on *Batch* as you must base your import on a batch template. You can work with *Import* tasks directly from *Administration* or within *Batch*. For more information, see [Import on page 115](#).

## Life of a Batch

Regardless of the batch type you create, the process or "life" of a batch includes similar steps. Use the following list to review descriptions for each step and how they relate to each other.

### > 1. Configure batch numbering scheme

First, you must configure a manual or auto-generated batch numbering scheme. With manual numbering schemes, you enter a batch number for the specific batch. With auto-generated numbering

schemes, you define the batch identifier, date formats, and the order they display. For details, see [Configure Batch Numbering Schemes on page 19](#).

## ➤ 2. Configure batch workflow

Next, configure a batch workflow. The batch workflow determines the series of statuses the batch must complete before its records can commit to the database. For details, see [Configure Batch Workflows on page 21](#).

## ➤ 3. Configure batch template

Before you can enter data into a batch, you must create a batch template to select the batch type, numbering scheme, and workflow. Batch templates define basic information about a batch, such as fields and default values for the fields. Once you specify a template and create a batch, the specified fields appear in the batch spreadsheet, so you can quickly enter information in the database. For details, see [Configure Batch Templates on page 26](#).

## ➤ 4. Create an uncommitted batch

Next, create an uncommitted batch. When you enter data into a batch, the batch is considered uncommitted (not yet applied or saved to your database). You can add a batch from **Batch entry**, or the program can create a batch using an import process. When a batch is uncommitted, its data has not yet created or updated records in your database. You can continue to edit the data entered in an uncommitted batch or move an uncommitted batch through its workflow. For details, see [Uncommitted Batches on page 54](#).

## ➤ 5. Search for a batch

Once you create a batch, you can use **Batch search** to locate it. For details, see [Batch Search on page 66](#).

## ➤ 6. Commit a batch

Once data entry is complete, you can commit the batch. When you commit the batch, the program uses the data entered in the batch to create or update records in your database. For details, see [Committed Batches on page 63](#).

**Tip:** Constituent batch and revenue batch are examples of batches that add new records. Other batch types, including change of address update and constituent address update, apply updated information to existing records.

## ➤ 7. Review batch reports

Once a batch is committed, you can use several batch reports to review committed data as well as any

exceptions (records that did not commit) that occurred. For details, see [Batch Entry Reports on page 149](#).

# Workflow - Life of a Batch



# Life of an Import Process

*Import* relies heavily on *Batch* as you must base your import on a batch template. You can work with *Import* tasks directly from *Administration* or within *Batch*. Regardless of the import you create, the process or "life" of an import includes similar steps. Use the following list to review descriptions for each step and how they relate to each other.

## ➤ 1. Configure import sources

Before you can create import processes, the system administrator must configure the import source locations where import files are stored on Secured FTP servers or a shared network directory. Each source includes a URL or file path and the credentials to access the location. When you create a new import process, you select the import source file location for that process. For details, see [Configure Import Sources on page 116](#).

## ➤ 2. Configure import file mapping templates

An import file mapping template specifies how to map fields from an import file to a batch template. The template allows you to map fields once rather than manually mapping them each time you create an import process. After you create an import file mapping template, you can use it with any import process associated with the same batch template. For details, see [Configure Import File Templates on page 118](#).

## ➤ 3. Generate import header file

To ease the mapping of fields to their corresponding header values in an import field, you can generate a comma-separated value (\*.csv) file that automatically includes the header values for a batch template. After you generate the header file, you can enter data into the header file rows and save the file. It is important to save the file in a location recognized by SFTP or the network directory. For details, see [Generate Import Header File on page 123](#).

## ➤ 4. Add an import process

Create an import process that generates a batch to add or update information from a file created in another application. For example, during an event, you may not have access to the program. Instead, you enter data in a spreadsheet program such as Microsoft *Excel*. After you save the spreadsheet, you can create an import process to bring that information into your database. When you add an import process, you select a batch template to use as the basis for the process. For details, see [Add an Import Process on page 124](#)

## ➤ 5. Start an import process

When you start an import process, the program uses the selected batch template to import the information in the selected import file into a new batch. After the process runs, the new batch appears

on the Uncommitted Batches tab of the Batch Entry page. For details, see [Start an Import Process on page 141](#).

### ➤ 6. Commit a batch

From the Uncommitted Batches tab, you can commit the batch. The program uses the data entered in the batch to create or update records in your database. For details, see [Committed Batches on page 63](#).

### ➤ 7. Batch reports

Once a batch is committed, you can use several batch reports to review committed data as well as any exceptions (records that did not commit) that occurred. For details, see [Batch Entry Reports on page 149](#).

# Workflow - Life of an Import Process



# Tips and Considerations

The following list highlights specific tips and considerations to help you save time and streamline your workflow.

## ➤ Data Management

- Take care of your data - carefully consider best practices and streamlined workflows before you begin working in the program. Consistent data entry promotes healthy data management.
- Think about instances where you may need to export (push out) data from your database with plans to import the data back in at a later time. For example, you create an import file of constituent addresses and export them out of your database to be reviewed by an outside source. When the addresses are updated, you create an import process (based on a batch template) to bring that data back in. As a best practice, we recommend you use caution when you import or export data to or from your database.
- Carefully consider whether or not it is a best practice for you to delete a batch after committing it to the database. You can select the **Delete batch after committing** option when you add a batch template, a new batch, and when you specify commit parameters. When you delete a batch, it is permanently removed from your database and you cannot reuse its batch number. Each batch number must be unique.

## ➤ Save Time

- To automatically save each row in the batch data entry grid as you work, select **Enable auto-save**. Each time you tab to a new row in the grid, the batch automatically saves. Saving frequently protects your data and offers one less step to think about. You can set this option when you add a batch template as well as a new batch. For more information, see [Add a Batch Template on page 27](#).
- You can create recurring import processes for imports used multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location. For more information, see [Import on page 115](#).
- When creating a new batch template and batch, or when you customize fields for a batch, you can work with default fields and values. Defaults are guidelines you set up to simplify data entry. For more information, see [Add a Batch Template on page 27](#).

## ➤ Navigation

- When you minimize a batch data entry screen, the screen appears as a link at the bottom right of your browser. To maximize the screen, click the link.
- When you enter transactions in a revenue batch, a **Constituent Window** displays information about the constituent and applications associated with the selected transaction. To view the **Constituent Window**, at the bottom of the grid, click **Constituent Window**. To help you navigate through this information, the **Constituent Window** contains multiple tabs. For more

information, see [Constituent Window on page 71](#).

- You can review the properties of the batch, which include the owner, projections, and running totals. You add these properties when you add the batch to the database. The program tracks the current number of contributions entered and automatically updates the current properties of the batch. To view the properties of a revenue batch, click **Properties** below the toolbar. The Properties window displays above the data entry grid. You can also edit batch properties by clicking **Properties** in the toolbar. For more information, see [Edit batch properties on page 57](#).
- As you enter information into a batch, you can use the toolbar ribbon to quickly find commands you need to complete a task. The tasks on the toolbar ribbon are unique to each batch type, and are grouped together under sections. Each section on the toolbar ribbon relates to a type of activity, such as **Configuration**, **Processes**, or **Messages**. For more information, see [Batch Entry Toolbar on page 70](#).

**Note:** For revenue batches, the Main and Revenue tabs display above the toolbar and help categorize tasks related to each area.

- On the batch data entry screen, to quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each task that is available in the current view.  
To access a task on the toolbar ribbon, click the corresponding letter. To exit the shortcut key display mode, you can select **Esc**, or simply click your mouse.
- To move quickly to the first field of the next batch row, click **CTRL ENTER** on your keyboard.
- In the batch data entry grid, some fields also include a sub grid that displays several associated fields for data entry. For example, when you click in the **Phones** field in the batch data entry grid, a sub grid displays additional fields, such as **Phone type**, **Seasonal start**, and **Seasonal end**.
- To view the record of a constituent included in a revenue batch, select the constituent's row in the data entry grid and click **Go to** on the toolbar. A new window opens where you can view and edit constituent details without losing any data in your batch window. When you finish with the constituent record, simply close the window and you return to the batch data entry grid.
- At times, fields on the batch data entry screen may be disabled. Certain actions may also be disabled in the toolbar. Disabled fields and actions are directly related to the type of batch you are using as well as the type of action you are trying to complete. For example, in an enhanced revenue batch, you must select "Recurring gift" or "Pledge" in the **Revenue type** field to enable the **Split designations** task on the toolbar.
- When a batch is ready to move to the next step in the workflow, you can update its status.  
For example, your organization's workflow for a constituent batch specifies that after you enter data into a batch, an approver must validate the data entry before the program commits the batch to the database. To submit the batch for approval, you must update its status to the next status of the workflow. You can update a batch to the next workflow status from the Batch Entry page or the batch data entry screen. For more information, see [Update a Batch to the Next Workflow Status on page 60](#).

## ➤ Helpful References

- You can import a variety of record types into your database. For details about data entry fields for a specific record type, you can review the relevant user guide located on our [How-to Documentation page](#). For example, you can use the Constituent Batch Basic template to add or import multiple new constituent records. For more information, see the *Constituents Guide*. You can also use the Event Batch Basic template to add or import multiple new event records. For more information, see the *Events Guide*.
- For recurring gift payments and pledge payments, you can create a business process to automatically generate a revenue batch to create payment records for these transactions. For more information, see the *Revenue Guide*.

# Batch Configuration

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In **Batch entry**, before you create and manage batches, we recommend you work with the following batch configuration tasks to ensure a consistent environment for your batch processes:

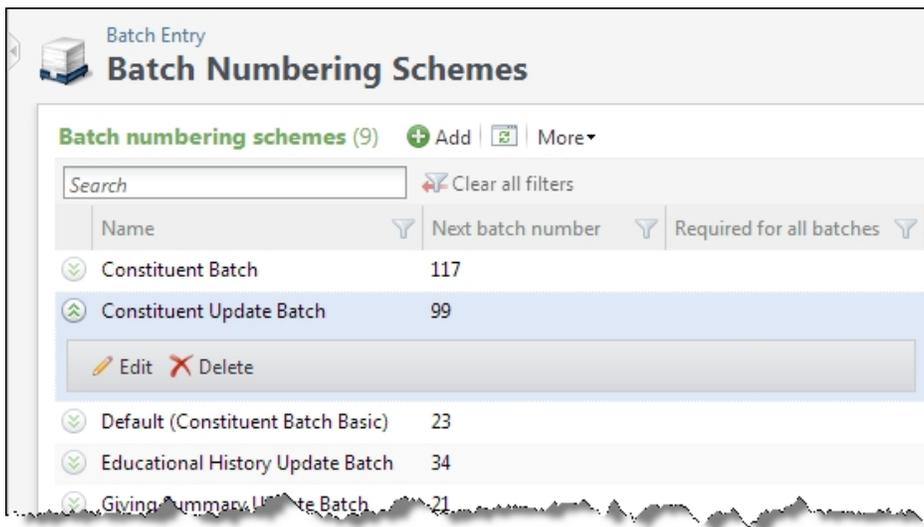
- Configure a batch numbering scheme to determine how the program generates numbers to identify a batch.
- Configure a batch workflow to determine the states the batch must complete before its records can commit to the database.
- Configure a batch template to define basic information about the batch, such as fields included in the batch and default values for the fields.

**Note:** Before you work with batch configuration tasks, we recommend you review [Life of a Batch on page 8](#).

## Configure Batch Numbering Schemes

On the Batch Numbering Schemes page, you manage the batch numbering schemes used to create batches. Numbering schemes are used to determine how the program generates numbers to identify a batch. Generated numbers can contain a sequence number, the date, and a user-defined label. When you search for a batch at a later time, you can easily use the batch number to identify the one you want.

To access the Batch Numbering Schemes page, click **Batch entry** in *Revenue* or *Administration*. From the Batch Entry page, click **Batch numbering schemes** under **Configuration**.



The **Batch numbering schemes** grid displays batch numbering schemes in your database. For each numbering scheme, you can view its name and next available batch number.

To update the information that appears in the grid, click **Refresh** on the action bar.

**Tip:** After you add a batch numbering scheme, you can edit its name or default settings. You can also select to restart the numbering of the next available batch number to the default sequence start.

**Warning:** You cannot delete a numbering scheme currently in use by a batch template.

## Add Batch Numbering Schemes

You can create two types of numbering schemes: manual or auto-generated.

With manual numbering schemes, you enter the batch number as you create batches. The batch number options are disabled and you specify only the exception identifier.

**Note:** Integration batches and import batches cannot use a template that contains a "Manual" numbering scheme.

When you want the program to assign numbers to new batches automatically, create an auto-generated numbering scheme. For auto-generated numbering schemes, you can define the batch identifier and date formats, as well as the order they display.

### ➤ Add a batch numbering scheme

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch numbering schemes**. The Batch Numbering Schemes page appears.
3. On the action bar of the **Batch numbering schemes** grid, click **Add**. The Add a batch numbering scheme screen appears.

4. In the **Name** field, enter a unique name to help identify the numbering scheme. For example, enter a name related to the type of batch that will be used with this numbering scheme.
5. In the **Type** field, select how the batch number scheme will be created.  
Your choices are "Auto-generated" or "Manual." When you select "Manual," options under **Batch number** are disabled and you can only specify the exception identifier. When you create an "Auto-generated" numbering scheme, you define the batch identifier and date formats, and the order in which they appear. The program assigns batch numbers for new batches automatically.
6. Under **Batch number**, select whether to include a batch identifier and date for the automatically generated batch numbers. To include these elements, select the corresponding checkbox.
7. In the **Order** column, select the order in which each selected element appears in the batch number.
8. In the **Details** column, enter the default settings for each selected element.

- a. In the **Next sequence** field, enter the first number to use when the program starts to create batches with the numbering scheme. You can also select a separator to use between the batch elements.
  - b. In the **Leading zeroes** field, select the number format for the batch number sequence. The program formats leading zeroes based on the number used in the next sequence. For example, if the next sequence is 99 and the leading zero format is 0#, the batch number is 100. The batch number is not restricted to two digits. The number of zeroes plus the # sign represent how many digits show initially. When the next sequence number does not contain as many digits, leading zeroes are used. The leading zeroes format does not restrict the sequence to a specific number of digits; it simply requires a minimum number of digits.
  - c. When you select to include a batch identifier in the batch number, in the **Batch identifier** field, enter the text to appear in batch numbers generated with the scheme. You can also select a separator to use between the batch elements.
  - d. When you select to include the batch creation date in the batch number, in the **Date** field, select the format for the date such as MM-DD-YY. You can also select a separator to use between the batch elements.
9. Under **Exception batches**, select the type of batch number to assign to exception batches that are generated when you commit batches.
- To use the selected numbering scheme to generate a new batch number for the exception batches, select **Use the next available batch number**.
  - To use the number assigned to the original batch with a sequential number to indicate its order in exception batches generated from the batch, select **Use the original batch number and append an exception sequence**. For example, when you select this option, the number of the second exception batch generated when you commit a batch is the original batch number followed by "2."

To use a label to specify an exception batch, enter a number in the **Exception identifier** field. This appears between the original batch number and the number of the exception batch.

Keep in mind, the separator for the last field in the batch number applies to the exception batch number for the auto-generated numbering schemes.

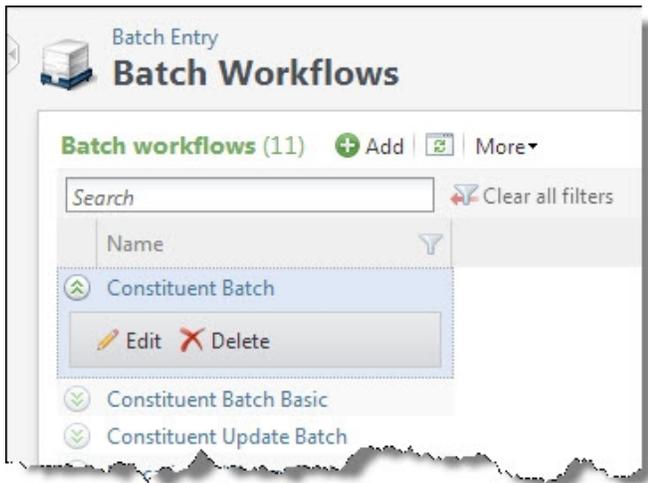
**Note:** Before you save the numbering scheme, we recommend you verify that batch numbers are formatted correctly in the preview fields.

10. Click **Save**. You return to the Batch Numbering Schemes page. The new numbering scheme now displays in the **Batch numbering schemes** grid.

## Configure Batch Workflows

On the Batch Workflows page, you manage the batch workflows used to create batch templates. The batch workflow determines the batch states the batch must complete before its records can commit to the database.

To access the Batch Workflows page, click **Batch entry** in *Revenue* or *Administration*. From the Batch Entry page, click **Batch workflows** under **Configuration**.



The **Batch workflows** grid displays the batch workflows in your database. Once you create a batch workflow record, you then access the workflow record to specify batch statuses and the steps available for each status. After you create a workflow, you can then create a batch template. To access a workflow record, click the record's name in the grid. To edit or delete a workflow, click the double arrows next to a workflow to expand its row and display an action bar. From the action bar, click **Edit** or **Delete**.

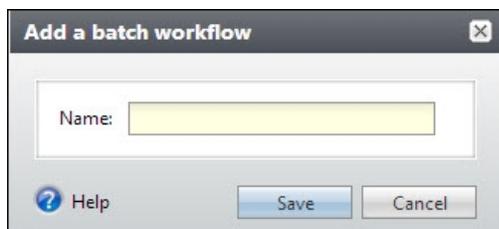
**Warning:** When a batch workflow is associated with a batch template, you cannot delete the batch workflow until it is removed from use on the batch template.

## Add a Batch Workflow

The batch workflow determines the statuses and steps the batch must go through before a user can commit its records to the database. Before you specify the statuses and steps, you must first create and name your batch workflow record. For information, see [Batch Workflow Record on page 23](#).

### ➤ Add a batch workflow

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch workflows**. The Batch Workflows page appears.
3. On the action bar of the **Batch workflows** grid, click **Add**. The Add batch workflow screen appears.



4. Enter a unique name to help identify the batch workflow.

5. Click **Save**. The batch workflow record appears. On the batch workflow record, you must specify statuses and steps. For information, see [Batch Workflow Record on page 23](#).

Once you specify a workflow's statuses and steps, review the workflow to make sure it is complete and correctly moves a batch to committal.

## Batch Workflow Record

From the batch workflow record, you can define and manage the status values of the batch workflow and the steps used to transition a batch from one status to another.

Each batch template in your database can have a unique workflow. For example, in the workflow for a constituent batch, your organization may allow the batch to be committed directly from the data entry status. Or, your organization may require that the data entry of a batch be approved before committal.

To access a batch workflow record, in the **Batch workflows** grid, click the name of the workflow.



**Note:** To return to the Batch Workflows page, click **Batch Workflows** at the top of the record.

On the batch workflow record, the **Step 1: Define status values used with the workflow** grid lists the batch status values associated with the workflow. For each status, you can view whether or not it is the initial status of the workflow and whether or not users can edit and commit the data of a batch in that status. For more information about workflow statuses, see [Add a Batch Workflow Status on page 23](#).

The **Step 2: Define the steps used to transition a batch from one status to another** grid displays the steps used to transition a batch from one status to another. For more information, see [Add or Edit a Batch Workflow Step on page 25](#).

## Add a Batch Workflow Status

The batch workflow defines the basic process of the batch. When you add a batch workflow, you must add status values to determine the process a batch must complete before its records commit to the database.

### ➤ Add a batch workflow status

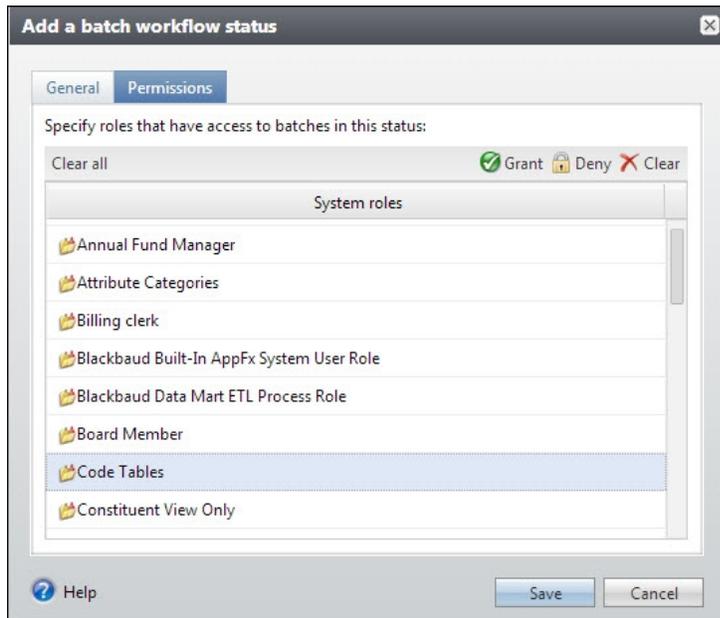
1. On the batch workflow record, click **Add** on the action bar of the **Define status values used with the workflow** grid. The Add a batch workflow status screen appears.

**Note:** You can also access the Add a batch workflow status screen within the **From status** and **To status** fields on the Edit batch workflow steps screen.

2. On the General tab, enter a unique name to help identify the batch workflow status.
3. Select how to handle a batch in this status and whether this is the first status in the workflow.
  - To designate this as the first status in the workflow, select **This is the initial status for the workflow**. You can select this option for only one status in the workflow. When an existing status in the workflow is currently specified as the initial status, the program automatically deselects **This is the initial status for the workflow** for that status.

**Note:** To use a workflow on a batch template, the workflow must include one status where **This is the initial status for the workflow** is selected.

- In this status, to enable users to edit a batch, select **Allow batch to be edited in this status**. When you select this option, users can edit the data entry of the batch.
  - In this status, to enable users to commit the records of a batch to the database, select **Allow batch to be committed when in this status**. Depending on the workflow, you can enable a batch to be committed from multiple statuses. If you select this option, **Only allow commit when projected totals match batch totals** is enabled. Select this option to ensure projected totals and batch totals match before committing the batch.
  - In the **Days allowed before batch is overdue** field, enter the number of days the batch can be in this status before it is considered overdue. The maximum number of days you can enter is 255. When you set this field to be greater than zero for a workflow status, an exclamation point appears in the **Batch number** column for any batches on the Uncommitted Batches tab that have been in the status longer than the specified number of days. To specify no time limit on the workflow status, leave the default setting of "0."
4. Select the Permissions tab. On this tab, you specify roles that have access to batches in this status.



5. The **System roles** box displays all roles that have access to batches in this status. For each system role, specify access rights as necessary.
  - To enable users in a specific system role to access batches in this status, select the role in the **System roles** box and click **Grant** on the action bar. A green checkmark appears next to the system role you selected.
  - To prevent users in a specific system role from accessing batches in this status, select the role in the **System roles** box and click **Deny** on the action bar. A lock icon appears next to the system role you selected. When a user is associated with multiple system roles and one of those roles is denied access rights to a batch in this status, the user cannot access the batch even when another of the user's system roles is granted rights.
  - To neither grant nor deny a system role access rights to a batch in this status, select the role in the **System roles** box and click **Clear** on the action bar. When left clear, and the user does not have system administrator rights, the user cannot access the batch in this status.
  - To remove all granted and denied statuses assigned to the system roles, click **Clear all** on the action bar.
6. Click **Save**. You return to the batch workflow record. The new workflow status appears in the **Step 1: Define status values used with the workflow** grid.

## Add or Edit a Batch Workflow Step

Once you define a workflow status, you can then specify the steps the user can perform with a batch in that status. The step you select determines the next status in the batch workflow.

For example:

**From status:** "Open" **Step name:** "Submit for Review" **To status:** "Submitted"

**From status:** "Submitted" **Step name:** "Approve" **To status:** "Approved"

**From status:** "Submitted" **Step name:** "Reject" **To status:** "Open"

You add batch workflow step from the **Step 2: Define the steps used to transition a batch from one status to another** grid on the workflow record.

### ➤ Add or edit a batch workflow step

1. On the batch workflow record, click **Edit** on the action bar of the **Step 2: Define the steps used to transition a batch from one status to another** grid. The Edit batch workflow steps screen appears.

	From status	Step name	To status
*			

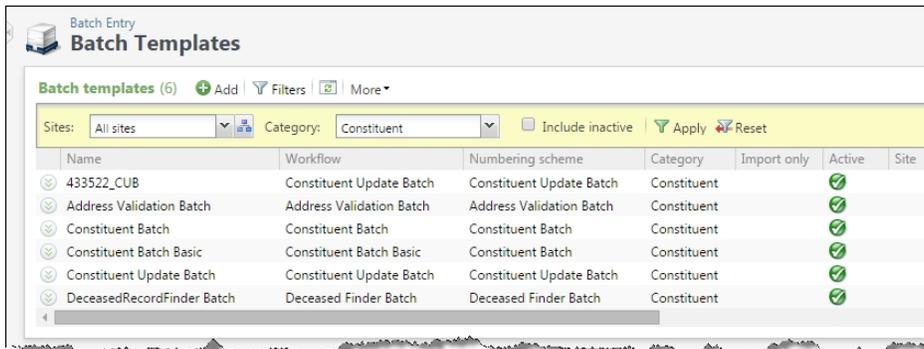
2. In the **From status** field, select the status the batch moves when the user performs the step. When necessary, you can add a new workflow status from this field.
3. In the **Step name** field, enter a unique name to help identify the workflow step.
4. In the **To status** field, select the status to which the batch moves when the user performs the step. When necessary, you can add a new workflow status from this field.
5. Click **Save**. You return to the batch workflow record.

## Configure Batch Templates

On the Batch Templates page, you manage the batch templates used to create batches. Batch templates define basic information about the batch, such as fields included in the batch and default values for the fields.

When you create a batch template, you select the batch type (such as Constituent or Revenue) and a workflow. The workflow defines the process a batch goes through during the add or update process.

To access the Batch Templates page, click **Batch entry** in *Revenue* or *Administration*. From the Batch Entry page, click **Batch templates** under **Configuration**.



The **Batch templates** grid displays all batch templates currently in your database. To limit the batch templates that appear in the grid to those of a specific type of data, click **Filters** on the action bar. The **Category** field appears. In the **Category** field, select the category by which to filter the templates and click **Apply**. For example, if you manage multiple batch types and want to view only templates for constituent batches, select “Constituent” and click **Apply**. You can also select whether to include inactive batch templates in the grid. To update the information that appears in the grid, click **Refresh** on the action bar.

When you create a batch template, you select the batch type, numbering scheme, and workflow, and specify any additional fields and defaults to use in the batch’s records. From the grid, you can perform several tasks to manage your batch templates.

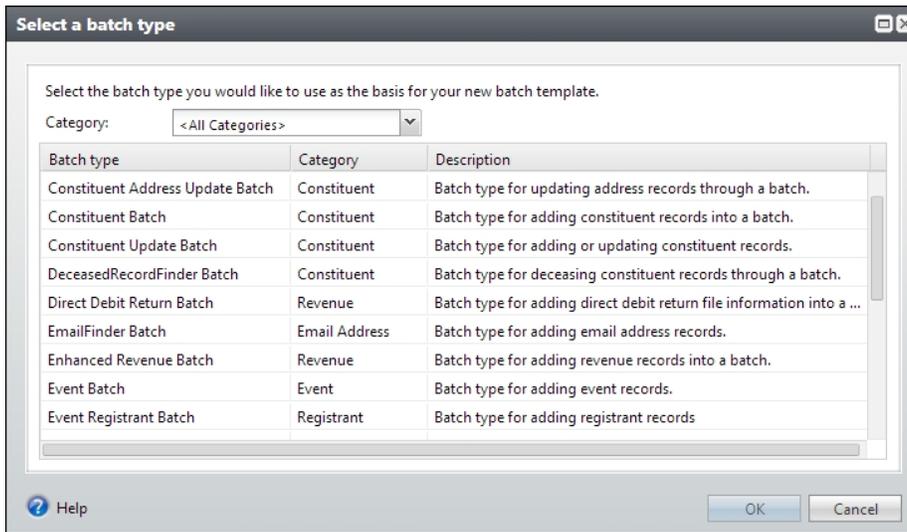
**Tip:** You can use the same batch template for multiple batches.

**Tip:** To help you work with **Batch entry**, the program provides default, basic batch templates. These batch templates provide the basic fields necessary to add information to create records. For information about the fields included in these batch templates, see [Default Basic Batch Templates on page 45](#).

## Add a Batch Template

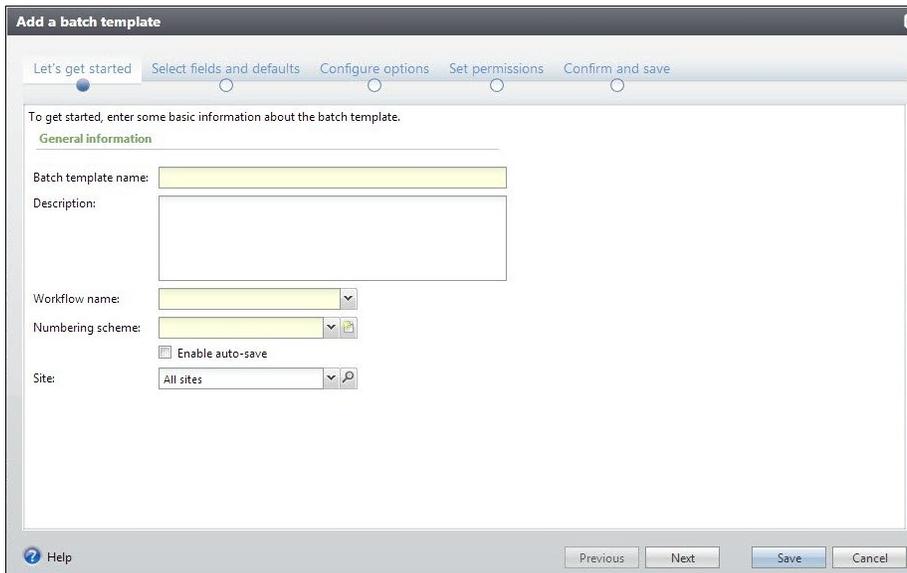
Before you can add a batch to the database, you must create the batch template. Batch templates define basic information about the batch, such as the fields included in the batch and default values for the fields.

To add a batch template, select **Add** on the action bar of the Batch Templates page in **Batch entry**. The Select a batch type screen appears where you can select a batch type to use as the basis for your new batch template. Use the **Category** field to narrow the batch types that display.



After you select a batch type, click **OK**.

The Add a batch template screen displays and includes a series of tabs designed to walk you through the process of creating a batch template.



- On the **Let's Get Started** tab, work with the batch template name, workflow, and numbering scheme.
- On the **Select Fields and Defaults** tab, specify how the template be used.
- On the **Configure Options** tab, specify options for commit, constituent matching, and constituent updates.
- On the **Set Permissions** tab, assign permissions to the batch template.

- On the **Confirm and Save** tab, review batch template information to ensure the fields and options you selected are accurate, and save.

From any of the tabs, use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen.

**Tip:** A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.

## > Let's get started

1. From the Add a batch template screen, click **Let's get started**. The Let's get started tab appears. For more information about how to access the Add a batch template screen, see [Add a Batch Template on page 27](#).

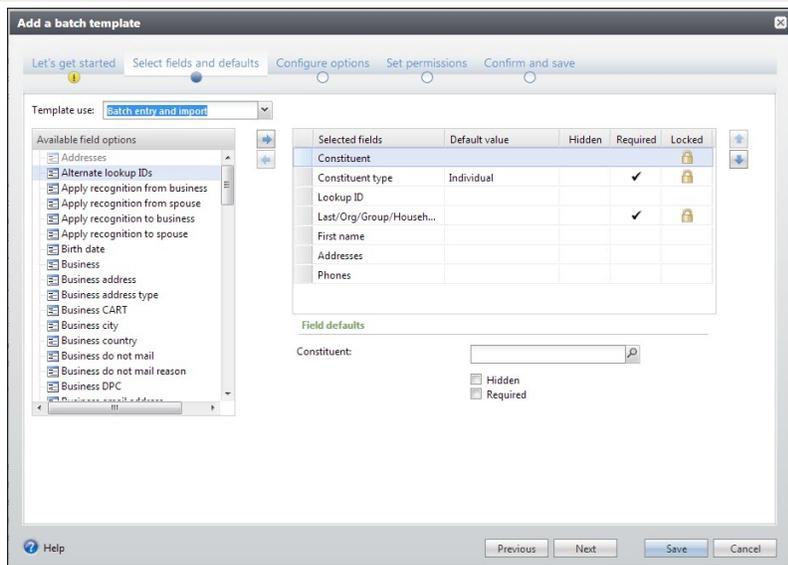
**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.

2. Under **Let's get started**, in the **Batch template name** and **Description** fields, enter a unique name and description to help you identify the batch template.
3. In the **Workflow name** field, select the workflow to use with this template. This field displays all workflows in your database that have a status designated as an initial state. When the workflow you want does not appear in the drop-down list, you can add the workflow to the database. For more information about batch workflows, see [Configure Batch Workflows on page 21](#).
4. In the **Numbering scheme** field, select the numbering scheme to use with this template. You can also select to add a new numbering scheme from this field.  
When you use a global numbering scheme (one that has been marked required), the **Numbering scheme** field displays the name of the global scheme and is disabled. For more information about numbering schemes, see [Configure Batch Numbering Schemes on page 19](#).
5. Select **Enable auto-save** when you want the batch to automatically save each row as you work.
6. Click **Next** to move to the **Select fields and defaults** tab.

## ➤ Select fields and defaults

1. From the Add a batch template screen, click **Select fields and defaults**. The Select fields and defaults tab appears. For more information about how to access the Add a batch template screen, see [Add a Batch Template on page 27](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.



2. Under **Select fields and defaults**, in the **Template use** field, specify how the template is used. This field is enabled only with certain batch types.
  - Select "Batch entry and import" to make the template available for both importing and batch entry.
  - Select "Batch entry only" to make the template available only for batch entry.
  - Select "Import only" to make the template available only for importing. When you select this option, the template is not available for selection when creating a new batch.
3. In the **Available field options** box, a list of all the fields available to use in the batch template appears. The selected batch type determines which fields appear in this box. When a + symbol appears next to an entry in the **Available field options** box, you can click the + symbol to view a list of field names grouped under the heading.

In the **Selected fields** box, fields required by the selected batch type are marked **Required**. Any fields that cannot be removed from the **Selected fields** box are marked **Locked**. Add any additional fields to include in the batch template. To move fields to the **Selected fields** box, select them in the **Available field options** box and click the right arrow. You can select multiple fields and move groups, and move entire folders. When a field appears in the **Selected fields** box, it is disabled in the **Available field options** box.

**Note:** To move fields to the **Selected fields** box, you can also drag and drop them from one box to another.

**Note:** When you design a constituent batch, you can select to add the **Constituent security attribute** field. When you add this field and select a security group as a field default or during batch data entry, only users in the selected security group can manage constituent records created during batch committal.

**Note:** When creating an Event Registrant template, when you select a status of “Registered (will not attend),” the application automatically sets the **Attended** field to “No.”

4. The order of the fields in the **Selected fields** box is the order the fields appear in the batch. Once you select all the fields to use in the batch, use the up and down arrows to arrange their order. You can also drag the fields up and down to arrange their order.
5. Under **Default value**, set the default setting for the fields or checkboxes in the **Selected fields** box as necessary.
  - a. To set a default setting for a field, select it in the **Selected fields** box and, under **Default value**, enter its default value.
  - b. To mark a checkbox in the **Selected fields** box by default, select it in the **Selected fields** box and, under **Default value**, mark its checkbox. When you enter data into the batch, the selected checkbox is automatically marked. For example, when you include the **Do not send mail to this address** checkbox in a constituent batch and want it automatically marked in the batch, select it in the **Selected fields** box and mark its checkbox under **Default value**.
  - c. When you set a default value for an item in the **Selected fields** box and do not expect its value to change for any record entered in the batch, you can hide the field. When you hide a field or checkbox, it does not appear in the batch for data entry. Records added to the batch automatically include the default value. To hide a field or checkbox, select it in the **Selected fields** box and mark **Hidden** under **Default value**.
  - d. To make a field or checkbox required in the batch, select it in the **Selected fields** box and mark **Required** under **Default value**.

**Note:** Some fields are automatically marked as **Required**, as specified by the selected batch type. When the batch type requires a field, you cannot deselect the **Required** checkbox for the field.

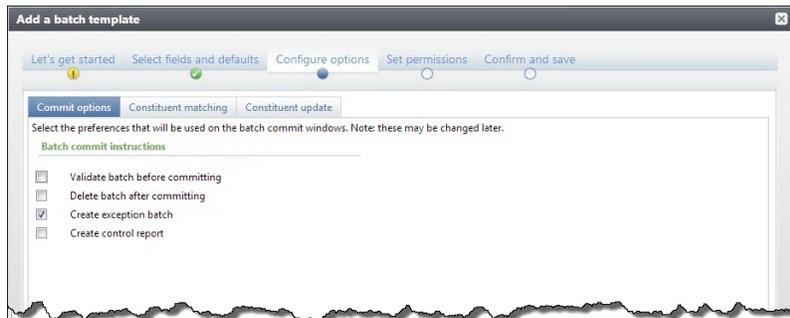
**Tip:** To prevent the creation of blank address records, we recommend you delete default address information from the batch row when you add a record with no address data.

6. Click **Next** to move to the Configure options tab.

## ➤ Configure options

1. From the Add a batch template screen, click **Configure options**. The Configure options tab appears. For more information about how to access the Add a batch template screen, see [Add a Batch Template on page 27](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.



2. Under **Configure options**, on the Commit options tab, select which actions the program should complete when it commits the batch.

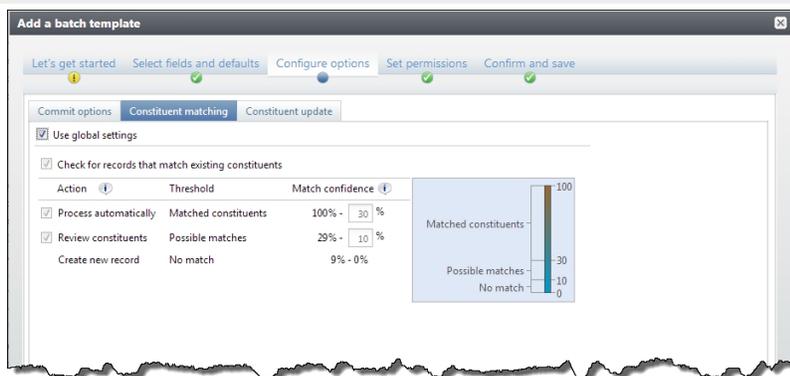
- To validate the batch before you commit it to the database, select **Validate batch before committing**.

**Note:** When you validate a batch, the program examines all the information entered in the batch before committing.

- To delete the batch after you commit it to the database, select **Delete batch after committing**. When you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.
- To create a batch of all records that do not commit to the database, select **Create exception batch**.
- To generate a control report after you commit the batch to the database, select **Create control report**. The control report describes the committed batch and provides information about the records included in the batch.

3. Under **Configure options**, select the Constituent matching tab.

**Note: Constituent matching** is available for only these batch types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, and Revenue Update.



4. On the Constituent matching tab, you can use matching settings to identify records in the batch that may already exist as constituents in your database. When you select **Use global settings**, the percentages default from the global settings defined on the Constituent matching settings page in *Administration*. When you select this option, matching settings on the template are updated automatically any time you update matching settings in *Administration*.

To change the default settings, clear **Use global settings** and select **Check for records that match existing constituents**. The thresholds defined on this screen apply to all batches produced from this batch template.

- a. Edit the percentage range for the **Matched constituents** threshold. Batch records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import.

**Note:** For Constituent Update batches, the program may update the existing constituent with information from the incoming constituent according to your organization's selected constituent update rules. For more information about update rules, see [Constituent Updates on page 36](#).

- b. Edit the percentage range for the **Possible matches** threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. During validation, the program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.

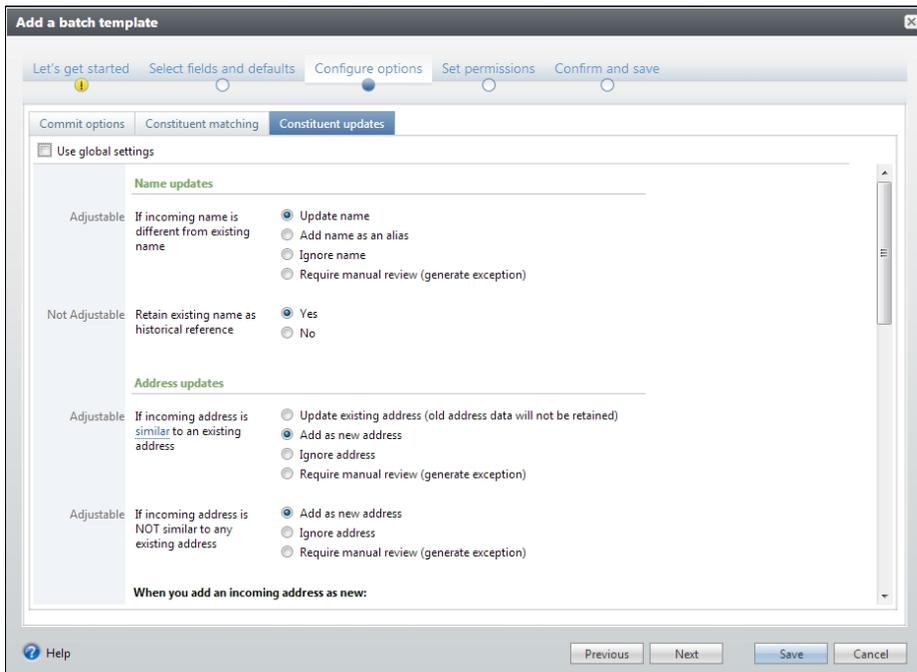
For more information about how to compare records on the duplicate resolution screen, see [Resolve Duplicate Constituents in a Batch on page 97](#).

- c. The percentage range for the **No match** threshold is based on your settings for the upper thresholds. Batch records with match scores in this range probably do not match an existing record. The action that occurs depends on the batch type. For Constituent Update batches, the program creates a new record.

**Note:** For Enhanced Revenue or Revenue Update batches, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.

5. Under **Configure options**, select the Constituent updates tab.

**Note:** The Constituent updates tab is only available for Constituent Update batch templates.



6. You can use constituent update rules to manage how the program resolves conflicting data on matched constituents in a batch. When you select **Use global settings**, the program uses the default rules to update constituents.

To set different constituent update rules for a batch or import process, clear **Use global settings** and select other rules. For more information about options on the Constituent updates tab, see [Constituent Updates on page 135](#).

7. Click **Next** to move to the Set permissions tab.

## Commit Options

On the **Commit options** tab under **Configure options**, you can specify which actions the program should complete when it commits the batch.

Screen Item	Description
<b>Validate batch before committing</b>	Select this checkbox to validate the batch before you commit it to the database. When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist.
<b>Delete batch after committing</b>	Select this checkbox to delete the batch after you commit it to the database. If you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.
<b>Create control report</b>	Select this checkbox to generate a control report after you commit the batch to the database. The control report describes the committed batch and provides information about the records included in the batch.

## Constituent Matching

**Note:** Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

On the Constituent matching tab under **Configure options**, use the threshold settings to define three percentage ranges or "thresholds" for match confidences that determine when incoming records are matches, possible matches, or not matches based on their match scores. **Match confidence** compares field values from the new record with existing records and assigns match scores for fields weighted by field type. Match confidence is calculated based on the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about how match confidence scores are calculated, see the *Constituent Duplicates and Merge Tasks Guide*.

**Note:** The Constituent matching tab is available for Constituent Update, Membership Dues, or Enhanced Revenue batch templates.

The program performs different actions for each threshold as described in this table:

Screen Item	Description
<b>Use global settings</b>	When you select <b>Use global settings</b> , matching thresholds default from the Constituent Matching Settings page in <i>Administration</i> . If you update the matching settings in <i>Administration</i> , the program updates the settings on this batch template accordingly.
<b>Check for records that match existing constituents</b>	To set different matching settings for a batch template, clear <b>Use global settings</b> , select <b>Check for records that match existing constituents</b> , and then adjust the thresholds.
<b>Process automatically</b>	<p>Edit the percentage range for the <b>Matched constituents</b> threshold. Batch records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the batch. This process occurs behind the scenes and requires no actions from users.</p> <p><b>Note:</b> For Constituent Update batches, the program may update the existing constituent with information from the incoming constituent according to the constituent update rules. For more information about update rules, see <a href="#">Constituent Updates on page 135</a>.</p> <p>You can clear <b>Process automatically</b> to turn off automatic updates.</p>

Screen Item	Description
<b>Review matches</b>	<p>Edit the percentage range for the <b>Possible matches</b> threshold. Batch records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.</p> <p>For more information about how to compare records on the duplicate resolution screen, see <a href="#">Resolve Duplicate Constituents in a Batch on page 97</a>.</p> <p>You can clear <b>Review matches</b> to turn off manual reviews.</p>
<b>Create new record</b>	<p>The percentage range for the <b>Create new record</b> threshold is based on your settings for the upper thresholds. Batch records with match scores in this range probably do not match an existing record.</p> <p>The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For enhanced revenue imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.</p>

## Constituent Updates

On the Constituent updates tab, under **Configure options**, you can configure update rules for a batch template. These rules determine how the program updates names, birth dates, addresses, phone numbers, and emails on existing constituents when there are data conflicts such as similar names or addresses.

**Note:** The Constituent updates tab is available for only Constituent Update batch templates.

### Use global settings

When you select **Use global settings**, the program uses the default constituent update rules.

To configure different constituent update rules for a batch or import process, clear **Use global settings** and use the options below.

### Name updates

Under **Name updates**, for the **If name is different from existing name** setting, select one of these options:

- **Update name**—Select this option to replace the name on the existing constituent with the name from the incoming constituent.
- **Add name as an alias**—Select this option to add the name from the incoming constituent as an alias to the existing constituent rather than replace an existing name. For example, if the incoming first name is "David" and the existing first name is "Dave," the program adds David an alias and leaves "Dave" as the first name.

- **Ignore name**—Select this option to never update the name on the existing constituent. For example, if the incoming first name is "David" and the existing first name is "Dave," the program leaves the first name as "Dave."
- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting names on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for names but **Update existing address** for addresses, the program does not automatically update the address fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the address from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming name.

For the **Retain existing name for historical reference** setting, to store the existing name on the constituent record under **Historical names**, select **Yes**. This occurs when the batch is committed. To discard the existing name, select **No**.

**Note:** Need a visual? View the [name update flowchart](#).

## Address updates

Under **Address updates**, for the **If incoming address is similar to an existing address** setting, select one of these options:

**Note:** "Similar" means the incoming address (**Street number**, **Street name**, and **Zip code**) is very close to an existing address, but there are differences in one or more of the address fields. To find similar addresses, the program compares the incoming address to each address on the existing constituent (home, business, etc.) and applies the address portion of the matching algorithm to calculate how similar the addresses are. When a pair of addresses score 86 or higher, they are considered similar. For example, if the existing street address is 1955 Main St. 29402 and the incoming is 1956 Main St. 29402, their address matching score is 92, so the program applies the rule selected for the **If address is similar to an existing address** setting. If the incoming address is similar to multiple existing addresses, the program applies the rule to the existing address with the highest address matching score. If no existing addresses are found that are similar to an incoming address, the program applies the rule selected for the **If address is NOT similar to any existing address** setting.

- **Update existing address (old address will not be retained)** — Select this option to replace the address on the existing constituent with the address from the incoming constituent.

**Note:** For imported Constituent Update batches, if the constituent row includes the constituent ID as well as the address ID (generally only used in vendor files), the address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the address ID, the program applies the selected constituent update rule to the address.

- **Add as new address** — Select this option to add the incoming address as an additional address rather than update the existing address.

- **Ignore address** — Select this option to never overwrite the address on the existing constituent. The program discards the incoming address.
- **Require manual review (generate exception)**— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the address. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for addresses but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming address.

For the **If address is NOT similar to any existing address** setting, select one of these options:

- **Add as new address** — Select this option to add the incoming address as a new address to the existing constituent.
- **Ignore address** — Select this option to never add the incoming address to the existing constituent.
- **Require manual review (generate exception)**— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically add the address.

Under **When you add an incoming address as new**, you can select additional options for the new addresses. These options also apply to new addresses entered on the duplicate resolution screen.

For the **If new address had the same type as any existing address** setting, select one of these options:

- **Make existing address inactive** — Select this option to make inactive any existing addresses with the same address type as the new address. The program updates the **End date** field on the constituent for all existing addresses with that address type.

**Note:** If the new and existing addresses are similar and neither has an address type assigned, the program does not make the existing address inactive. If the new address is not similar to any existing addresses and it does not have an address type assigned, any existing addresses that do not have an address type assigned remain active.

- **Keep the existing address active**— Select this option to keep the existing address active and add the incoming address as an additional address with the same address type.

For the **Make new address primary** setting, select one of these options:

**Note:** If the existing constituent has no addresses, the primary address in the batch is always primary regardless of the option selected for **Make new address primary**.

- **Always** — Select this option to always make the new address primary. If a constituent has more than one new address in the batch, the one marked primary is made primary. If none of the new addresses is marked primary, the one that appears first in the batch is made primary.

- **Only if the current primary address has the same address type** — Select this option to make the new address primary only if it has the same address type as the existing primary address. If there are multiple new addresses in the batch and one has the same address type as the existing primary address, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and one of those new addresses is marked primary, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and none of those new addresses is marked primary, the one that appears first in the batch is made primary.
- **Never** — Select this option to never make the new address primary.

**Note:** Need a visual? View the [address update flowchart](#).

### Phone number updates

Under **Phone number updates**, for the **If incoming phone is not identical to any existing phone** setting, select one of these options:

- **Add as new phone** — Select this option to add the incoming phone number as a new number.
- **Ignore phone** — Select this option to never add the incoming phone number to the existing constituent.
- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting phone numbers on the duplicate resolution screen even if the match confidence score is high enough to automatically update the phone number. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for phone numbers but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming phone number.

**Note:** For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the phone ID (generally only used in vendor files), the phone number is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the phone ID, the program applies the selected constituent update rule to the phone number.

Under **When you add an incoming phone as new**, you can select additional options for the new phone numbers. These options also apply to new phone numbers entered on the duplicate resolution screen.

For the **If new phone has the same type as any existing phone** setting, select one of these options:

- **Make existing phone inactive** — Select this option to make inactive any existing phone numbers with the same phone type as the new phone number. The program updates the **End date** field on all existing phone numbers on the constituent with that phone type.

- **Keep existing phone active**— Select this option to keep the existing phone number active and add the incoming phone number as an additional phone number with the same phone type.

For the **Make new phone primary** setting, select one of these options:

**Note:** If the existing constituent has no phone numbers, the primary phone number in the batch is always primary regardless of the option selected for the **Make new phone primary** setting.

- **Always** — Select this option to always make the new phone number primary. If a constituent has more than one new phone number in the batch, the one marked primary is made primary. If none of the new phone numbers is marked primary, the number that appears first in the batch is made primary.
- **Only if the current primary phone has the same phone type** — Select this option to make the new phone number primary only if it has the same phone type as the existing primary phone number. If there are multiple new phone numbers in the batch and one has the same phone type as the existing primary phone number, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and one of those new phone numbers is marked primary, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and none of those new phone numbers is marked primary, the one that appears first in the batch is made primary.
- **Never** —Select this option to never make the new phone number primary.

**Note:** Need a visual? View the [phone number update flowchart](#).

## Email address updates

Under **Email address updates**, for the **If incoming email address is not identical to any existing email address** setting, select one of these options:

- **Add as new email address** — Select this option to add the incoming email address as a new email address.
- **Ignore email address** — Select this option to never add the incoming email address to the constituent.
- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting email addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for email addresses but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming email address.

**Note:** For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the email ID (generally only used in vendor files), the email address is always updated on the constituent regardless of the selected constituent update rule. If the row

includes the constituent ID but not the email ID, the program applies the selected constituent update rule to the email address.

Under **When you add an incoming email address as new**, you can select additional options for the new email addresses. These options also apply to new email addresses entered on the duplicate resolution screen.

For the **If new email address has the same type as any existing email address** setting, select one of these options:

- **Make existing email address inactive** — Select this option to make inactive any existing email addresses with the same email type as the new address. The program updates the **End date** field on all existing email addresses on the constituent with that email type.
- **Keep existing email address active**— Select this option to keep the existing email address active and add the incoming email as an additional email address with the same email type.

For the **Make new email address primary** setting, select one of these options:

**Note:** If the existing constituent has no email addresses, the primary email address in the batch is always primary regardless of the option selected for **Make new email address primary**.

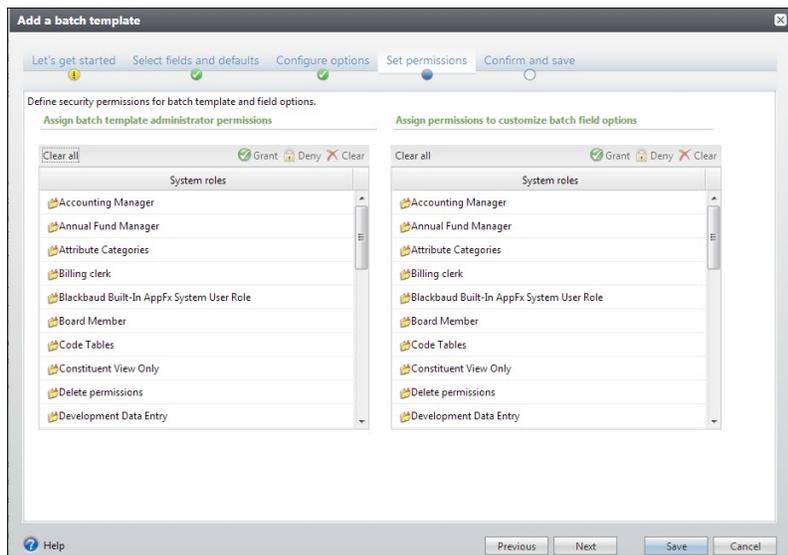
- **Always** — Select this option to always make the new email address primary. If a constituent has more than one new email address in the batch, the email marked primary is made primary. If none of the new email addresses is marked primary, the email that appears first in the batch is made primary.
- **Only if the current primary email address has the same email type** — Select this option to make the new email address primary only if it has the same email type as the existing primary email address. If there are multiple new email addresses in the batch and one has the same email type as the existing primary email address, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and one of those new email addresses is marked primary, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and none of those new email addresses is marked primary, the email that appears first in the batch is made primary.
- **Never** —Select this option to never make the new email address primary.

**Note:** Need a visual? View the [email address update flowchart](#).

## ➤ Set permissions

1. From the Add a batch template screen, click **Set permissions**. The Set permissions tab appears. For more information about how to access the Add a batch template screen, see [Add a Batch Template on page 27](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.



2. Under **Set permissions**, in the **System roles** box on the left, you can assign permissions to edit this batch template.
  - To enable users in a specific system role to edit the batch template, select the system role and click **Grant** on the action bar. The status of the selected system role changes to GRANTED.
  - To prevent users in a specific system role from administering the batch template, select the system role and click **Deny** on the action bar. The status of the selected system role changes to DENIED. When a user has multiple system roles and one of those roles is denied access rights, the user cannot administer the batch template, even when another of the user's system roles is granted rights.
  - To remove the GRANTED or DENIED status assigned to a system role, select the role and click **Clear** on the action bar. In this case, you do not want to grant a user in a specific system role access rights, but you also do not want to prevent the user from administering the batch template. This situation may occur for users with multiple system roles. The **Clear** option neither grants nor denies the system role administrator rights to the batch template.
  - To remove all GRANTED and DENIED statuses assigned to the system roles, click **Clear all** on the action bar.
3. In the **System roles** box on the right, you can assign permissions to customize fields within a batch.
  - To enable users in a specific system role to customize the fields within a batch, select the system role and click **Grant** on the action bar. The status of the selected system role changes to GRANTED.
  - To prevent users in a specific system role from customizing the batch template, select the role in the **System role** box and click **Deny** on the action bar. The status of the selected system role changes to DENIED. If a user has multiple system roles and one of those roles is denied access rights, the user cannot customize the batch template, even if another of the user's system roles is granted rights.
  - To remove the GRANTED or DENIED status assigned to a system role, select the role in the **System role** box and click **Clear** on the action bar. In this case, you do not want to grant a user in a specific system role access rights, but you also do not want to prevent the user from customizing the batch template. This situation may occur for users with multiple system roles.

The **Clear** option neither grants nor denies the system role rights to customize the batch template.

- To remove all GRANTED and DENIED statuses assigned to the system roles, click **Clear all** on the action bar.
4. Click **Next** to move to the Confirm and save tab.

## ➤ Confirm and save

1. From the Add a batch template screen, click **Confirm and save**. The Confirm and save tab appears. For more information about how to access the Add a batch template screen, see [Add a Batch Template on page 27](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.

Let's get started Select fields and defaults Configure options Set permissions Confirm and save

Review your batch template selections, click the previous button to edit, save when finished.

**General information**

Name: \_\_\_\_\_  
 Description: \_\_\_\_\_  
 Workflow: \_\_\_\_\_  
 Numbering scheme: \_\_\_\_\_  
 Batch type: Constituent Update Batch  
 Template use: Batch entry and import  
 Enable auto-save: No

**Commit options**

Validate batch before committing: No  
 Check for duplicate constituents: Yes  
 Delete batch after committing: No  
 Create exception batch: Yes  
 Create control report: No  
 Site: All sites

**Columns and defaults**

Constituent	Constituent type	Lookup ID	Last/Org/Group/H...	First name	Addresses	Ph
*	Individual					

Help Previous Next Save Cancel

2. Under **Confirm and save**, review the batch template information to ensure the fields and options you selected are accurate.
3. Click **Save** to save the template and return to the Batch Templates page.

## Copy a Batch Template

With **Batch entry**, you can easily create a new batch template based on a template already in your database. When you copy a batch template, you create a new batch template with the same batch type and workflow and same selected fields and field defaults as the selected batch template. This saves you time, as you do not need to recreate the field selection already used in another batch template. Once you create the new batch template, you can edit it, such as to adjust the selected fields or field defaults.

## ➤ Copy a batch template

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
3. In the **Batch templates** grid, click the double arrows next to the template you want to copy. From the expanded row that appears, click **Copy** on the action bar. The Copy batch template screen appears.

**Tip:** You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click **Filters** and, in the **Category** field, select the category by which to filter the batches. To display inactive batch templates in the grid, mark **Include inactive**. To view the batch templates that meet the specified filters, click **Apply**.

4. Enter a unique name and description to identify the new batch template.
5. Click **Save**. You return to the Batch Templates page. In the **Batch templates** grid, the new batch template appears.
6. Edit the new batch template as necessary. For example, adjust the selected fields or field defaults.

## Import Data into a Batch Template

In **Batch entry**, you can import data from a spreadsheet created in another application into the database. For example, you enter information about new constituents into a spreadsheet application such as Microsoft *Excel*. You can then create a business process to easily import the information from the spreadsheet into a batch template.

You can add an import process from the Batch Templates page. In the **Batch templates** grid, click the double arrows next to the batch template you want to use to capture the imported data. From the expanded row that appears, click **Create import** on the action bar. The Add import process screen appears. For information about this process, see [Add an Import Process on page 124](#).

## Mark a Batch Template as Inactive or Active

When you mark a batch template as inactive, users can no longer use it to create batches. For example, your organization may no longer use a specific template.

To mark a batch template inactive, from the Batch Entry page in *Administration*, click **Batch templates** under **Configuration**. The Batch Templates page appears. In the **Batch templates** grid, click the double arrows next to a template to expand its row. On the action bar, click **Mark inactive**.

**Tip:** Inactive batch templates do not display in the **Batch templates** grid. To view them, ensure you select **Include inactive** as a filter.

Alternatively, you can mark an inactive batch template as active to ensure your organization can use it to create a batch. To do this, from the same action bar, click **Mark active**.

## Default Basic Batch Templates

To help you work with **Batch entry**, the program provides basic batch templates. These batch templates provide the fields necessary to add basic information to create records. You can also use these batch templates to import information from a delimited or fixed-width file.

**Tip:** In the batch data entry grid, some fields include a sub grid that displays several associated fields for data entry. For example, when you click in the **Phones** field in the batch data entry grid, a sub grid displays additional fields, such as **Phone type**, **Seasonal start**, and **Seasonal end**.

## Constituent Batch Basic

The table below explains the fields included in the Constituent Batch Basic template. You can use this batch template to add or import multiple new constituent records. When a field is not required, you can leave it blank as necessary. For additional information about constituent data entry fields, see the *Constituents Guide*.

Field	Description
<b>Constituent type</b>	<p>Enter the type of constituent to add. This field is required.</p> <p>To add a person such as a donor or an employee as a constituent, enter "Individual."</p> <p>To add a business or company that supports your mission as a constituent, enter "Organization."</p> <p>To add a group of constituents who donate together under one entity such as a giving circle, enter "Constituent group."</p>
<b>Title</b>	For an individual constituent, enter the title of the individual such as "Mr.," "Mrs.," or "Dr."
<b>First name</b>	For an individual constituent, enter the first name of the individual.

Field	Description
<b>Last/org/group/household name</b>	This field is required. For an individual constituent, enter the last name of the individual. For an organization constituent, enter the name of the organization.
<b>Suffix</b>	For an individual constituent, enter the suffix of the individual such as "Jr.," "III," or "PhD."
<b>Address type</b>	Enter the type of address to add for the constituent such as "Home" or "Business."
<b>Address</b>	Enter the street address of the constituent, including apartment or suite number. When the address requires multiple address lines, press <b>ENTER</b> on your keyboard to access a new line within the field. Similarly, if you are adding information to the Address cell of an import spreadsheet, click <b>ALT + ENTER</b> on your keyboard to move to a new line within the cell.
<b>City</b>	Enter the city of the constituent.
<b>State</b>	Enter the state of the constituent.
<b>Country</b>	Enter the country of the constituent, such as "United States."
<b>Zip code</b>	Enter the Zip code of the constituent.
<b>Phone type</b>	Enter the type of phone number to add for the constituent, such as "Home" or "Business."
<b>Phones—Phone number</b>	Enter the phone number of the constituent.
<b>Phones—Primary</b>	To use the phone number as the primary number at which to contact the constituent, select the checkbox. To import this value, enter "True" or "Yes" to use the number as the primary contact. Otherwise, enter "False" or "No."
<b>Phones—Call after</b>	When the constituent requests you not call until after a specific time of day, enter the time to allow calls to the constituent.
<b>Phones—Call before</b>	When the constituent requests you not call after a specific time of day, enter the time to stop calls to the constituent.
<b>Phones—Start date</b>	When the phone number is active only after a specific date, enter the date to begin using the number.
<b>Email address</b>	Enter the email address for the constituent.
<b>Spouse first name</b>	For an individual constituent with a spouse, enter the first name of the spouse.

Field	Description
<b>Spouse last name</b>	For an individual constituent with a spouse, enter the last name of the spouse.
<b>Spouse copy address</b>	To copy the constituent's address to the spouse's record, select the checkbox. To import this value, enter "True" or "Yes" to copy the constituent's address. Otherwise, enter "False" or "No."
<b>Academic catalog program</b>	Select the constituent's program at the institution, such as "Undergraduate."
<b>Academic catalog degree</b>	Select the degree of the program the constituent attends at the institution.
<b>Constituent site</b>	Select the site you want to associate with the record. Records that can be associated with more than one site have a <b>Site</b> grid, instead of a <b>Site</b> field.

## Event Batch Basic

The table below explains the fields included in the Event Batch Basic template. You can use this batch template to add or import multiple new event records. If a field is not required, you can leave it blank as necessary. For additional information about event data entry fields, see the *Events Guide*.

Field	Description
<b>Name</b>	Enter the name of the event. This field is required.
<b>Start date</b>	Enter the date of when the event starts. This field is required.
<b>Capacity</b>	Enter the number of participants the event can accommodate.
<b>Category</b>	To help classify the event, enter its category or type such as "Reception" or "Sporting event."
<b>Contact</b>	Enter the name of the constituent who serves as a contact at the location of the event.
<b>Coordinators</b>	Enter the name of the staff member who serves as an event coordinator for the event.
<b>Description</b>	Enter a description to help further identify the event.
<b>End date</b>	Enter the date on which the event ends.
<b>End time</b>	Enter the time at which the event ends.
<b>Expenses—Type</b>	Enter the type of expense to add for the event, such as "Supplies."
<b>Expenses—Vendor</b>	Enter the name of constituent who serves as a vendor that performs the service associated with the expense.
<b>Expenses—Budgeted amount</b>	Enter the total amount budgeted for the expense.
<b>Expenses—Agreed amount</b>	Enter the total amount agreed upon with the vendor associated with the expense.

Field	Description
<b>Expenses—Amount paid</b>	Enter the total amount paid toward the vendor associated with the expense.
<b>Expenses—Due date</b>	Enter the date when payment for the expense is due to the vendor.
<b>Expenses—Date paid</b>	Enter the date your organization pays the vendor associated with the expense.
<b>Expenses—Comment</b>	Enter any additional information about the expense.
<b>Location</b>	Enter the name of the location where the event occurs.
<b>Prices—Registration type</b>	Enter the type of registration price to associate with the event, such as "Family" or "Corporate sponsor."
<b>Prices—Name</b>	Enter the name of the price associated with the registration type.
<b>Prices—Registration count</b>	Enter the total number of registrations to associate with the registration type. For example, for a registration type of Golf Foursome, enter "4."
<b>Prices—Registration fee</b>	Enter the amount a registrant pays to attend the event as the registration type.
<b>Prices—Cost</b>	Enter the total cost for the registration type. For example, the total cost of the event including catering and facility rental fees, divided by the total number of registrants of the registration type.
<b>Start time</b>	Enter the time at which the event begins.
<b>Tasks—Owner</b>	Enter the name of the staff member assigned the task.
<b>Tasks—Name</b>	Enter the name of the task to associate with the event, such as "Call the caterer."
<b>Tasks—Due date</b>	Enter the date by which the owner must perform the task.
<b>Tasks—Comment</b>	Enter any additional information about the task.

## Event Registrant Batch Basic

The table below explains the fields included in the Event Registrant Batch Basic template. You can use this batch template to add or import multiple new event registrant records. If a field is not required, you can leave it blank as necessary. For additional information about event registrant data entry fields, see the *Events Guide*.

Field	Description
<b>Event</b>	Enter the name of the event associated with the registration. This field is required.
<b>Registrant</b>	Enter the name of the constituent to register for the event. This field is required.
<b>Status</b>	Enter the status of the registration, such as "Registered" or "Attended."
<b>Registration option</b>	Enter the name of the registration price at which the registrant registers for the event, such as "Adult" or "Family." This field is required.
<b>Quantity</b>	Enter the number of registrations the registrant registers for the event. For example, when a registrant registers for two Adult registration, enter "2."
<b>Guests—Guest</b>	Enter the name of the constituent who the registrant registers as a guest.
<b>Guests—Waive registration fee</b>	To waive the registration fee for the guest, select the checkbox. To import this value, enter "True" or "Yes" to waive the registration fee. Otherwise, enter "False" or "No."
<b>Guests—Attended</b>	When the guest attended the event, select the checkbox. To import this value, enter "True" or "Yes" if the guest attended. Otherwise, enter "False" or "No."
<b>Waive benefits</b>	To waive the benefits for the registrant, select the checkbox. To import this value, enter "True" or "Yes" to waive the benefits. Otherwise, enter "False" or "No."
<b>Date</b>	Enter the date of when the registrant registers for the event.

## Enhanced Revenue Batch

The table below explains the default fields included in the Enhanced Revenue Batch template. You can use this batch template to add or import multiple, new revenue records. For more information about revenue data entry fields, see the *Revenue Guide*.

Field	Description
<b>Account system</b>	Select the General Ledger account system you want to use with this batch template. Only account systems for which you have the proper security rights appear.
<b>Constituent</b>	Enter the name of the constituent associated with the revenue transaction.
<b>Lookup ID</b>	Enter the primary lookup ID of the constituent associated with the revenue transaction.
<b>Amount</b>	Enter the total amount of the revenue transaction.
<b>Date</b>	Enter the date to associate with the transaction, such as the date your organization receives the revenue.

Field	Description
<b>Revenue type</b>	Enter the type of revenue transaction to add: "Payment," "Pledge," or "Recurring gift."
<b>Payment method</b>	Enter the payment method, such as "Cash" or "Credit card."
<b>Application</b>	Select how to apply the payment. For example, the revenue may be a donation or payment towards an unapplied matching gift claim. For more information about applications, see the <i>Revenue Guide</i> .
<b>Appeal</b>	If the transaction is in response to an appeal, enter the name of the appeal.
<b>Opportunity</b>	Enter the opportunity to which you want to apply the revenue, if any.
<b>Designation</b>	Enter the designation to which you want to apply the revenue.
<b>GL post status</b>	Specify the post status of the revenue in the General Ledger. To have the program automatically post the payment when you next run a Post to GL process, select "Not Posted." To not post the payment to the General Ledger, select "Do Not Post."

## Merchandise Receiving Batch

The table below explains the default fields included in the Merchandise Receiving Batch template. You can use this batch template to add inventory items to your system. For more information about merchandise fields, see the *Merchandise Guide*.

Field	Description
<b>Item</b>	Enter or search for the item to add.
<b>Item details</b>	Enter details for the item, such as size.
<b>SKU</b>	This field displays the stock-keeping unit (SKU) for the item. The SKU is sometimes provided by the vendor from which you purchased the item.
<b>Quantity</b>	Enter the quantity of the item to add to your system.
<b>Unit cost</b>	Enter the total amount your organization paid for each item.
<b>Retail price</b>	Enter the retail price at which your organization will sell each item.
<b>Vendor</b>	Enter or search for the vendor from which you purchased the item.
<b>UPC</b>	Enter the Universal Product Code (UPC) for the item. The UPC is often provided by the vendor from which you purchased the item.
<b>Comments</b>	Enter any additional information about the item that may be necessary or helpful.

## Merchandise Physical Count Batch

The table below explains the default fields included in the Merchandise Physical Count Batch template. You can use this batch template to adjust the quantity of your merchandise items. We recommend you use this template with the Physical Count Worksheet. For more information about the Physical Count Worksheet, see the *Merchandise Guide*.

Field	Description
<b>Item</b>	Enter or search for the item to add.
<b>Item details</b>	Enter details for the item, such as size.
<b>SKU</b>	This field displays the stock-keeping unit (SKU) for the item. The SKU is sometimes provided by the vendor from which you purchased the item.
<b>Current quantity</b>	This field displays the quantity currently in the system.
<b>Quantity</b>	Enter the physical count quantity.
<b>Comments</b>	Enter any additional information about the item that may be necessary or helpful.

# Batch Entry

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With *Batch*, you can add or update multiple records in your database at once. This is an efficient alternative to working with records individually and saves time. When you work with records in bulk, you eliminate the need to open and work with each individual record. For example, when you have similar information such as a group of volunteer timesheets from Saturday's Walk-A-Thon, it is much easier to add that information to your database in a group format using a timesheet batch.

In **Batch entry**, you can access several configuration tasks to ensure a consistent environment for your batch processes. Before you create and manage batches, you must first specify batch numbering schemes, workflows, and templates. For more information about these configuration tasks, see [Batch Configuration on page 18](#). Once you complete the necessary configuration options, you can begin to create and manage batches using the Uncommitted Batches and Committed Batches tabs on the Batch Entry page.

**Note:** You can also access **Batch entry** and **Batch search** from *Revenue*, *Constituents*, and *Volunteers*. These are the areas where it makes sense to enter data in a batch format and search for existing batches.

**Tip:** Several reports are available to help you track the records entered in a batch and correct the exceptions generated when you commit a batch. For more information, see [Batch Entry Reports on page 149](#).

# Batch Entry Page

On the Batch Entry page, you can enter data into batches and process batches through their workflows. Both uncommitted and committed batches are available on this page. To access the page, from *Administration*, click **Batch entry**.

Before you create and manage batches, you must first specify batch numbering schemes, workflows, and templates. You can access these configuration tasks from the Batch Entry page under **Configuration**. For more information about these tasks, see [Batch Configuration on page 18](#).

**Note:** When you work with constituent or revenue records, you can access the Batch Entry page from *Constituents* or *Revenue*.

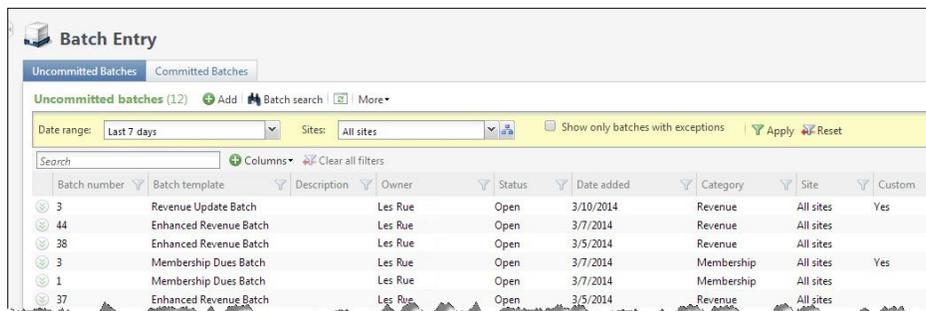
## Uncommitted Batches

On the Uncommitted Batches tab, you can view and manage your batches that are available for data entry. In the **Uncommitted batches** grid, information about your uncommitted batches appears. This information includes the batch number, template, description, owner, status, date added, and category.

To limit the batches that appear in the grid to those of a specific type of data, use the filters that appear above the grid. In the **Date range** field, select the date range by which to filter the batches. You can select to display batches that were added during the last 7 days or last 30 days. You can also select to show only batches that contain exceptions. To clear the filter criteria, click **Reset**. Use the search field to search for specific batches using details of the batch, such as the batch template name or owner. Each column in the grid also includes its own set of filters. Click the filter icon in a column to display additional filters.

To receive notification of changes to the batches in the **Uncommitted batches** grid, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when uncommitted batches are assigned, rejected, or approved, depending on your organization's batch workflow. To subscribe to the RSS feed, click **More, View RSS feed**.

When a batch is overdue in its current workflow status, a yellow caution symbol appears next to the batch number in the **Batch number** column.



Batch number	Batch template	Description	Owner	Status	Date added	Category	Site	Custom
3	Revenue Update Batch		Les Rue	Open	3/10/2014	Revenue	All sites	Yes
44	Enhanced Revenue Batch		Les Rue	Open	3/7/2014	Revenue	All sites	
38	Enhanced Revenue Batch		Les Rue	Open	3/5/2014	Revenue	All sites	
3	Membership Dues Batch		Les Rue	Open	3/7/2014	Membership	All sites	Yes
1	Membership Dues Batch		Les Rue	Open	3/7/2014	Membership	All sites	
37	Enhanced Revenue Batch		Les Rue	Open	3/5/2014	Revenue	All sites	

Additional batch information appears in the details pane that expands directly beneath the batch you select. To view details, in the **Uncommitted batches** grid, click the double arrows next to a batch to expand its row.

Batch number	Batch tem...	Description	Owner	Status	Date adde...	Category	Site	Custom
7	Constituen...	Exceptions...	SarahMcB...	Review	4/25/2012	Constituent	All sites	

Edit batch	Edit properties	Update status	Commit	Delete
------------	-----------------	---------------	--------	--------

Batch type:	Constituent Batch	Import file:	File15.csv	Original batch size:	7
Date changed:	6/4/2012	Import process:	ImportConstituent	Original batch:	6
New rows disabled:	No				

**Exceptions**

Exception	Count
<a href="#">Errors from validation</a>	7
<a href="#">General errors</a>	7
<a href="#">Import errors</a>	7
<a href="#">Invalid value errors</a>	7

For imported batches, the details pane includes a link to the import process that generated the batch. For exception batches, the details pane includes a link to the original batch in the batch chain. It also lists the exception types, which display as hyperlinks that allow you to correct the exceptions. In the case of duplicates, the exception type link takes you to the duplicate resolution screen. For other exception types, the link opens the batch with a filter applied to display only rows that contain the selected exception message.

Depending on the workflow status of the batch and your security rights and system role, you can perform many tasks to manage your uncommitted batches. When the batch completes its step in the workflow, you can update its status to the next status in the workflow or commit its records, depending on its current status.

For a revenue batch, you can view a validation report to verify the data entry of payment information. The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. In addition, the report includes other data entered for the transactions in the batch. To view the validation report, click the double arrows next to a batch to expand its row. On the action bar, click **Validation report**. For information about the validation report, see [Revenue Batch Validation Report on page 150](#).

When you commit a batch, you can create an exception batch, which contains all records that do not commit to the database. When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database. To view all batches related to an uncommitted batch, select the batch in the grid and click the batch number. The Batch Exception Chain page for the batch appears. For information about the items on this page, see [Batch Exception Chain on page 103](#).

## Add a Batch

To use **Batch entry** to add records, you must define the basic properties of the batch. These properties include the batch number and description, the template used to create the batch, and the batch's owner. For a revenue batch, you can also enter the projected total monetary amount of the payments in the batch. To add a batch to the database, click **Add** on the Uncommitted Batches tab.

## > Add a batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. On the action bar of the **Uncommitted batches** grid, click **Add**. The Add a batch screen appears.
4. In the **Batch template** field, select the batch template to use. The batch template defines the fields and any default values that appear in the batch. The **Batch template** field displays the batch templates in the database applicable to your system role. Typically, a batch processing manager creates the batch template. When the required batch template does not appear, your organization must add it to the database.

For information about how to add a batch template, see the Batch Configuration chapter.

5. To adjust the fields in the batch template, click **Field options**. The Batch field options screen appears. For information about how to customize the fields of the selected batch templates, see [Customize the Fields in a Batch on page 75](#).
6. In the **Batch number** field, enter a unique number to identify the batch. Once you save a batch, you can no longer use its number for batches using the template. When you enter a number that another batch uses, and click **Save**, a message appears to remind you that the batch number must be unique.

**Tip:** When you open a batch, the batch number appears in the top corner of the screen. On the Batch Entry page, the batch number appears next to each corresponding batch in the grids.

When you select "Auto-generated" during the creation of the numbering scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. When you use a global numbering scheme, the batch uses the next number available in the global scheme. To manually enter a new number, select **Override**.

7. In the **Description** field, enter a unique description to identify the batch. The description appears in the **Uncommitted batches** grid so you can determine the purpose of the batch before you open it.
8. In the **Owner** field, select the user who owns the batch in its initial status.

**Note:** The program automatically assigns the person creating the batch as the batch owner. The selected owner owns the batch in its initial status. When you update the status of a batch, you can assign the batch to a new owner. For information about how to update a batch status, see [Update a Batch to the Next Workflow Status on page 60](#).

9. Select **Enable auto-save** to automatically save each row in the batch as you work.
10. When the selected batch template is for a revenue batch, the **Projected #** field is enabled. Enter a total number of payment records you plan to enter in the batch.

The batch allows an unlimited number of records. For example, you create a batch for the payments you received on the previous day. You received a total of ten payments yesterday, so you enter "10."

Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.

11. When the selected batch template is for a revenue batch, the **Projected amount** field is enabled. Enter the projected monetary amount for the payment records you plan to enter in the batch.

For example, you create a batch for the payments you received on the previous day. You received payments totalling \$500 yesterday, so you enter "\$500."

Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.

12. Click **Save**.
  - When you leave the **Owner** field blank or assign ownership of the batch to yourself, the batch data entry screen appears. For information about how to enter data into the batch, see [Batch Data Entry on page 68](#).
  - When you assign batch ownership to another user, you return to the Uncommitted Batches tab.

**Note:** You can configure system alerts to automatically notify application users by email when they become owners of new batches. For information about how to enable system alerts for batches, see the *Administration Guide*.

## Edit a Batch

You can edit both the properties of a batch as well as the data in a batch.

You can change the properties of the batch from the Batch Entry page or batch data entry screen. You cannot, however, change the batch template selected to create the batch.

When the workflow status of the batch allows you to edit the records included in the batch, you can enter or update the data entry of the batch. In **Batch entry**, you enter the information for each record on a separate row of the spreadsheet, or batch, on the data entry screen. The batch template used to create the batch defines the fields that appear on the data entry screen. There is no limit to the number of records you can enter in a batch.

**Warning:** You can only edit a batch when its workflow status allows it.

### > Edit batch properties

Editing properties allows you to make changes to the batch configuration, such as batch number and description, once you save it. To ensure that a batch owner has access to the batch once it is committed, click **Update status** to change owners instead of **Edit properties** on the action bar. For more information, see [Update a Batch to the Next Workflow Status on page 60](#).

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. Under **Uncommitted batches**, click the double arrows next to a batch to expand its row. On the action bar, click **Edit properties**. The Edit batch properties screen appears.

**Tip:** You can also access the Edit batch properties screen from the toolbar of the batch data entry grid. From the toolbar, click **Properties**.

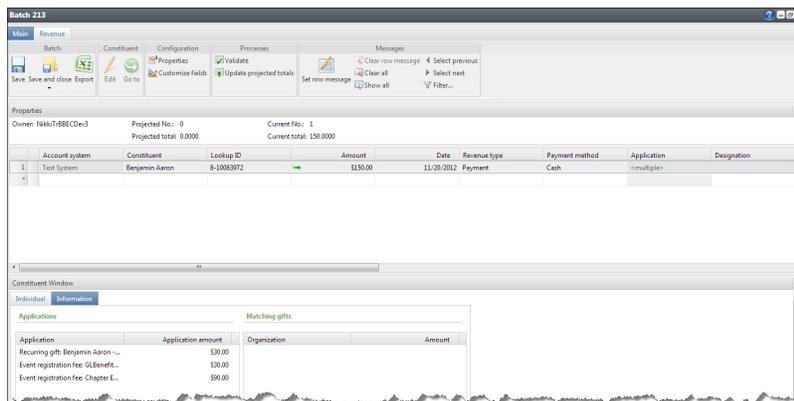
4. Edit the information as necessary. You can Select **Enable auto-save** to automatically save each row in the batch as you work.
5. Click **Save**. You return to the Batch Entry page.

**Warning:** The batch number must be unique per template. When you change the batch number to one that is used by another batch, a message appears to remind you that the batch number must be unique. Click **OK** and enter a new number to identify the batch.

### ➤ Enter records in a batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. Under **Uncommitted batches**, click the double arrows next to a batch to expand its row. On the action bar, click **Edit batch**. The batch data entry screen appears. The items that appear on this screen depend on the selected batch template.

You can limit the batches that appear in the **Uncommitted batches** grid to those of a specific type of data. To filter the grid, select a date in the **Date range** field or select **Show only batches with exceptions** and click **Apply**. Use a search field to search for specific details associated with a batch, such as a batch template or owner. You can also filter each column in the grid.



The grid has the look and feel of a spreadsheet and displays the fields and default values of the batch template selected to create the batch. When the batch is committed, each row of the spreadsheet that contains information becomes a new record or updates a record.

4. In the grid, enter or update data for the records. To move from column to column, press **TAB** on the keyboard. For more information about data entry in a batch, see [Batch Data Entry on page 68](#).
  - For columns with a down arrow, select the entry. For example, in the **Constituent Type** column of a constituent batch, select Individual or Organization.
  - For columns with a search button, use a Search screen to find the entry in the database.
  - For columns with date information, select the date from a calendar. To automatically enter the current date in a date field, press **F3** on your keyboard.

The grid can contain up to 50 records. If you add more than 50 records into a grid, the batch adds a new page for the additional records. To navigate through the pages of the batch, click the right or left arrows next to the **Displaying page** field, or press **PAGE UP** or **PAGE DOWN** on your keyboard.

To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

**Tip:** When the item you want to enter in the batch is not currently in the database, you can typically add it from the search screen. To add an item to the database from the search screen, click **Add** on the action bar of the **Results** grid.

5. When you enter payments in a revenue batch and the selected constituent has an outstanding commitment, the Apply to commitments screen appears when you tab out of the **Constituent** column. Specify how to apply the payment to the outstanding commitments. To not apply the payment to outstanding commitments, click **Cancel** to return to the batch data entry screen. For more information about how to apply a payment in a revenue batch to an outstanding commitment, see [Apply a Payment in a Revenue Batch to Outstanding Commitments on page 78](#).
6. When you enter payment records in a revenue batch, the **Constituent Window** pane displays information about the constituent associated with a selected payment.

7. When you enter payment records in a revenue batch, you can easily view the properties of the batch, including the batch owner, the current amount of payments, the projected amount of payments, and any monetary totals.

To view the properties of a revenue batch, click **Properties** on the Main tab of the toolbar.

**Warning:** To prevent the creation of blank address records, we recommend you delete default address information from the batch row when you add a record with no address data.

8. To save the batch data entry at any time, click **Save** on the action bar or press **CTRL+ S** on the keyboard. To save the information and close the batch, click **Save and Close** on the toolbar.
  - When the program detects an error in the batch data entry, such as a required field is left blank, a message appears to inform you of the error. Click **OK** and correct any errors.
  - When the program detects no errors in the batch data entry, a message appears to inform you that the batch saved successfully. To return to the Batch Entry page, click **OK**.

## Update a Batch to the Next Workflow Status

When a batch is ready to move to the next step in the workflow, you can update its status. For example, your organization's workflow for a constituent batch specifies that after you enter data into a batch, an approver must validate the data entry before the program commits the batch to the database. To submit the batch for approval, you must update its status to the next status of the workflow. You can update a batch to the next workflow status from the Batch Entry page or the batch data entry screen.

**Note:** To ensure that a batch owner has access to the batch after it is committed, always use **Update status** to assign new owners instead of **Edit properties**. For more information about when to use **Edit properties**, see [Edit batch properties on page 57](#).

Before you update the status of a batch, we recommend you validate the batch to verify the data entry is free from exceptions. For information about how to validate a batch, see [Validate a Batch on page 96](#).

**Note:** When the batch is in the final status of its workflow before committal, the **Update status** option is disabled. To move the batch to its next status, you must commit the batch. For information about how to commit a batch, see [Commit a Batch on page 61](#).

### ➤ Update a batch to the next workflow status

1. On the Batch Entry page, under the **Uncommitted batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **Update status**. The Update status screen appears.

The screenshot shows a dialog box titled "Update batch status". It contains the following fields and controls:

- Current status:** Open by Admin
- Next step:** A dropdown menu with "Commit" selected.
- Next status:** Commit
- Assign to:** A dropdown menu with "KevinYa" selected.
- Comments:** A large empty text area.
- Buttons:** "Help" (with a question mark icon), "Save", and "Cancel".

2. In the **Next step** field, select the step to perform with the batch to move it to the next status. The selected batch workflow determines the options that appear in the list.
3. In the **Assign to** field, select the user to process the batch in the new status. The selections in this field are users with system roles that allow administrator rights to batches in the new status.

**Note:** You can configure system alerts to automatically notify application users by email when they become batch owners due to a batch status update. For information about how to enable system alerts for batches, see the *Administration Guide*.

4. In the **Comments** field, enter any comments about the batch. For example, enter a note for the new owner about why the batch is being assigned.
5. Click **Save**. You return to the Batch Entry page.

Under **Uncommitted batches**, the **Owner** and **Status** columns display updated information about the new status.

## Commit a Batch

Once a batch completes its workflow, you can commit it to the database. When you commit a batch, the program uses the data in the batch to automatically create or update records in the database. After committal, you can view the batch commit status page and generate control and exception reports.

**Note:** On the Commit Multiple Batches page, you can create a process to commit multiple batches at once. For information about how to create a commit multiple batches process, see [Add a Multiple Batch Commit Process on page 105](#).

Before you commit a batch, we recommend you validate the batch to verify the data entry is free from exceptions. For information about how to validate a batch, see [Validate a Batch on page 96](#).

### ➤ Commit a batch to your database

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.

- Under **Uncommitted batches**, click the double arrows next to a batch to expand its row. On the action bar, click **Commit**. The Commit Parameters screen appears. The default settings for commit parameters are defined on the batch template.

**Tip:** On the Batch Entry page, to limit the batches that appear in the grid to those of a specific type of data, use the filters that appear above the grid.

- Under **Batch commit instructions**, select the options to perform during the batch committal.
  - To validate the batch before you commit it to the database, select **Validate batch before committing**.

**Note:** When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist. Before you commit a batch, we recommend you validate the batch to locate any data entry errors. For information about batch validation, see [Validate a Batch on page 96](#).

- To check for duplicate constituents, select **Check for duplicate constituents**.
- To delete the batch after you commit it to the database, select **Delete batch after committing**.

**Note:** When you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.

- To manually add an exception batch number, select **Override** and enter a number. An exception batch is created for all records that do not commit to the database.
- Under **Results**, select how to handle the records the program commits to your database.

- To generate a control report after you commit the batch to the database, select **Create control report**. The control report describes the committed batch and provides information about the records included in the batch.
- To create a selection of all the records created in the database when you commit the batch, select **Create output selection** and enter a name to help identify the selection. To overwrite any existing selection of the same name, select **Overwrite existing selection**.

**Note:** The output selection query includes only records that commit to the database. The query does not include exceptions, or records that do not commit to the database. We strongly recommend you select **Create output selection**. You can use this query when you create acknowledgement letters or other mailings for the constituents for whom you added payments in the batch.

6. Click **Start**. The commit process begins.

- When you select **Validate batch before committing**, the program validates the batch. When the batch validates, the program commits its records to the database. When the validation fails, a validation report appears so you can view the exceptions.

When the process completes, the batch commit status page appears. For information about the batch commit status page, see [Batch Commit Status Page on page 65](#).

**Tip:** If the batch commit process seems to stop mid-process, highlight the batch and select to resume the process. This allows the batch to continue processing.

## View a Validation Report for a Revenue Batch

The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. The report also includes additional details, such as the batch number, status, owner, and projected total. To view a validation report, in the **Uncommitted batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **Validation report**.

## Committed Batches

On the Committed Batches tab, the **Committed batches** grid displays information about your batches that are committed to the database. When you commit a batch to the database, the program uses its data to create or update records in the database. For information about how to commit a batch, see [Commit a Batch on page 61](#).

To limit the batches that appear in the grid to those of a specific type of data, use the filters that appear above the grid. In the **Date range** field, select the date range by which to filter the batches. You can select to display batches that were added during the last 7 days or last 30 days. You can also select to include deleted batches. To clear the filter criteria, click **Reset**. Use the search field to search for specific batches using details of the batch, such as the batch template name or owner. Each column in the grid also includes its own set of filters. Click the filter icon in a column to display additional filters.

Additional batch information appears in the details pane that expands directly beneath the batch you select. To view details, in the **Committed batches** grid, click the double arrows next to a batch to expand its row.

Batch number	Description	Owner	Status	Category	Batch template	Date committed	Custom	Site	Date added
42		Les Rue	Committed	Revenue	Enhanced Revenue Batch	3/5/2014		All sites	3/5/2014
46		Les Rue	Committed	Revenue	Enhanced Revenue Batch	3/10/2014		All sites	3/10/2014

Batch details

Total records: 3  
Batch type: Enhanced Revenue Batch

To receive notification of changes to the batches in the **Committed batches** grid, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when uncommitted batches are assigned, rejected, or approved, depending on your organization's batch workflow. To subscribe to the RSS feed, click **More, View RSS feed**.

When you commit a batch, you can create an exception batch, which contains all records that do not commit to the database. When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database.

To view all batches related to an uncommitted batch, click the batch number in the **Batch number** column of the grid. The Batch Exception Chain page for the batch appears. For information about the items on this page, see [Batch Exception Chain on page 103](#).

**Tip:** It is important to note that you cannot edit or recommit a successfully committed batch. To update previously committed data, you can manually update that data or create an update batch.

## View the Batch Commit Status Page

When you commit a batch, the program generates the batch commit status page to track the committal of the batch. This page displays information about the batch and its commit process. From the batch commit status page, you can also view the control report and exception report of the batch. To view the commit status of a batch on the Committed Batches tab, select the batch in the **Committed batches** grid and click **Committed** in the **Status** column. The Batch Commit status page appears. For information about the items on this page, see [Batch Commit Status Page on page 65](#).

## Open a Committed Batch

Once you commit a batch, you can still open it to view its data. To open a batch on the Committed Batches tab, under **Committed batches**, click the double arrows next to a batch to expand its row. On the action bar, click **Open batch**. The batch data entry screen appears.

## View a Batch Control Report

The batch control report lists the records in the batch that were committed to the database and provides information about each record. The information that appears depends on the type of batch

selected.

To view the batch control report for a batch on the Committed Batches tab, under **Committed batches**, click the double arrows next to a batch to expand its row. On the action bar, click **View control report**. To view the batch control report from the batch commit status page, click **View control report** under **Reports**. For information about this report, see [Batch Control Report on page 149](#).

## View a Batch Exception Report

The batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. The information that appears depends on the type of batch selected.

To view the batch exception report for a batch on the Committed Batches tab, under **Committed batches**, click the double arrows next to a batch to expand its row. On the action bar, click **View exception report**. To view the batch exception report from the batch commit status page, click **View exception report** under **Reports**. For information about this report, see [Batch Exception Report on page 150](#).

## Batch Commit Status Page

When a batch is committed, the program automatically generates a commit status page for the batch. When the batch is committed to the database, the commit status page records and displays the settings selected when you run the commit process.

To access the commit status page of a batch, select the batch in the **Committed batches** grid and click **Committed** in the **Status** column.

Batch entry  
**Batch 39**

**Batch commit process parameters**

Batch number:	39
Validate batch before committing:	Yes
Check for duplicate constituents:	Yes
Delete batch after committing:	No
Create exception batch:	Yes
Exception batch number:	<Next available batch number>
Create control report:	No
Create output selection:	No
Output selection name:	
Overwrite existing selection:	No

**Batch commit status**

Status: ✔ Completed

Status message: Completed

Started by:	BLACKBAUD\LeSt	Server name:	CHSSLESTA01
Started:	3/5/2014 4:16:45 PM	Total records processed:	13
Ended:	3/5/2014 4:16:56 PM	Number of exceptions:	0
Duration:	11 seconds	Records successfully processed:	13

**Note:** To return to the Batch Entry page, you can click the **Batch entry** link at the top of the batch commit status page.

Under **Batch commit process parameters**, the parameters of the batch committal appear. This information includes the batch number, information about its output selection and exception batch, and whether to delete the batch after committal. You enter this information when you commit the batch to the database.

Under **Batch commit status**, information about the committal process appears. This information includes the status of the commit process, the start and end times of the commit process, the user who ran the commit process, the total number of records processed, and how many of those records did and did not successfully commit to the database.

## Batch Search

After you add a batch, you can use **Batch search** to search for and open the batch at any time. Before working in batches, we recommend you search for a batch to see if it already exists. You can use **Batch search** in *Administration* or from the action bar on the Batch Entry page.

**Note:** You can also access **Batch search** from *Revenue*, *Constituents*, and *Volunteers*.

### > Search for a batch

Your batch search can be broad or specific, depending on the criteria you select. To retrieve the records you need, we recommend you carefully select criteria and enter detailed information. For

example, you can use **Batch number**, **Description**, **Status**, and **Batch type**. For searches returning more than 100 batches, only the first 100 appear in the results.

1. From *Constituents*, *Revenue*, or the Batch page in *Administration*, click **Batch search**. The Batch Search screen appears.

**Tip:** You can enter data in all fields or none. Depending on your criteria, the program may find one batch or many.

2. In the **Batch number** field, enter the unique batch number of the batch to find.

**Tip:** To include all batches in the search, leave one or more of the search fields blank.

To include batches that contain electronic funds transfer (EFT) transmission files in the search results, select **Include batches with EFT transmission files**.

3. In the **Description** field, enter the description given to help identify the batch.
4. In the **Status** field, select the status of the batch to find. You can select "Uncommitted," "Committed," or "Deleted."
5. In the **Created by** field, enter the batch owner who created the batch.
6. In the **Created on** field, enter the date the batch was created. To select the date from a calendar, click the calendar button.
7. In the **Batch type** field, enter the type of records included in the batch.
8. Click **Search**. The program searches the database.
9. In the **Results** grid, all batches that match your search criteria appear. Select the batch to open.
10. Click **Select**. The batch data entry screen appears.

## Pledge Write-off Batch Search

Use the Pledge write-off Batch Search to locate the pledges you want to write off. To access the Pledge write-off Batch Search screen, click the search button in the **Pledge** field of the Pledge write-off batch.

In the top frame, decide how to filter pledges for the search and select or enter your criteria. You can enter data in all fields or none, depending on how broad or narrow you want your search to be.

When you click **Search**, the program searches the database and displays all pledges that meet your search criteria in the **Results** grid.

## Batch Data Entry

In **Batch entry**, you can create and manage batches using the Uncommitted Batches and Committed Batches tabs.

**Note:** To access the Batch Entry page, click **Batch entry** in *Revenue* or *Administration* and click **Batch entry**.

After you add a batch, you can enter or edit data using the batch data entry screen. From this screen, you enter information about each record in a separate row of the grid. The grid has the look and feel of a spreadsheet with each row in the spreadsheet representing a separate record. Within the grid, you can quickly access information about each record, add and edit records, and attach row comments using the toolbar ribbon at the top of the screen. The options on the batch data entry screen depend on the selected batch type.

**Tip:** There is no limit to the number of records you can enter in a batch.

You can edit a batch only when its batch workflow status enables it. For more information about batch workflows, see [Configure Batch Workflows on page 21](#).

To enter or edit a batch for data entry, in the **Uncommitted batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **Edit batch**.

**Note:** Before you create and manage batches, you must first specify batch numbering schemes, workflows, and templates. For more information about these configuration tasks, see [Batch Configuration on page 18](#).

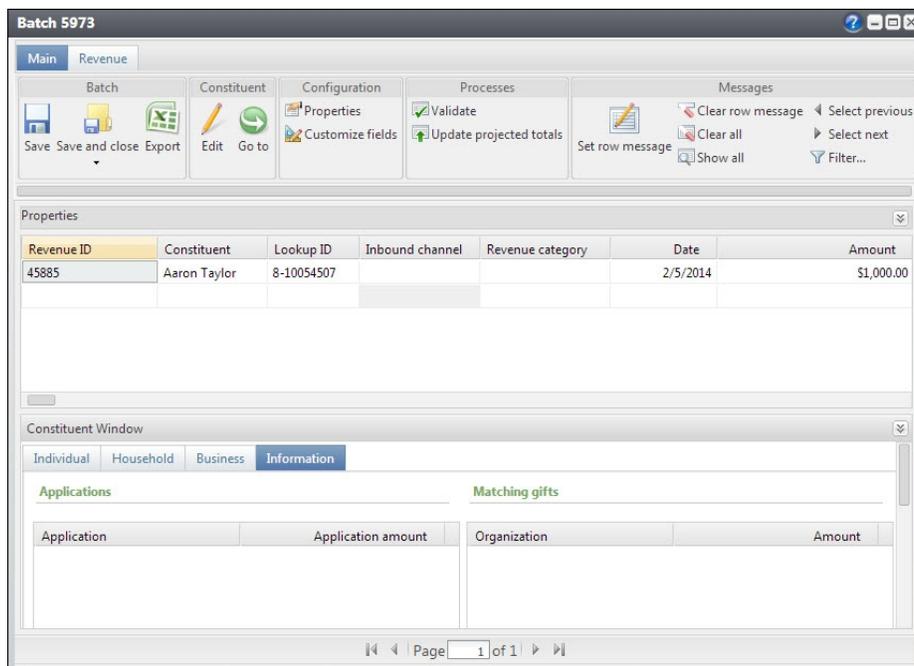
**Tip:** Several reports are available to help you track the records entered in a batch and correct the exceptions generated when you commit a batch. For more information, see [Batch Entry Reports on page 149](#).

**Tip:** To view the effectiveness of batch data entry for an application user, you can create a Batch Statistics key performance indicator (KPI). For information about this KPI, see [Batch Statistics Key Performance Indicator on page 95](#).

## Batch Data Entry Screen

On the batch data entry screen, you enter information about each record in a separate row of the batch. From this screen, you can perform various actions associated with **Batch entry**. The options on the batch data entry screen depend on the selected batch type.

To access the batch data entry screen, in the **Uncommitted batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **Edit batch**.



**Tip:** A minimized batch data entry screen appears as a link at the bottom right of your browser. To maximize the screen, click the link.

- The toolbar and menu bar above the grid on the batch data entry screen contain buttons that represent common tasks related to data entry. The tasks that appear depend on the selected batch template. For information about the available tasks, see [Batch Data Entry Tasks on page 73](#) and [Revenue Batch Data Entry Tasks on page 77](#).
- To move quickly to the first field of the next batch row, click **CTRL ENTER** on your keyboard.
- On the batch data entry screen, in the data entry grid, you enter information about each record you want to add or update. When you commit the batch, each row of the grid that contains information becomes a record. For more information about the batch data entry grid, see [Batch Data Entry Grid on page 70](#).

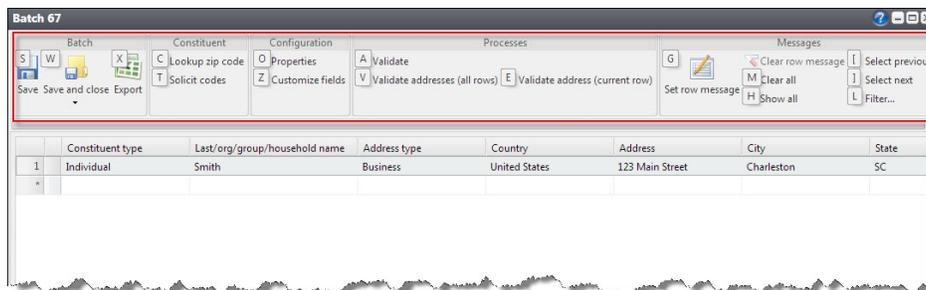
**Note:** To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), when you enter transactions in a revenue batch, you can enter full credit card numbers for payments, pledges, and recurring gifts. When you enter a credit card number in the batch data entry grid and leave its row, only the last four digits of the credit card number appear in the row. When you save the revenue batch, the program sends the credit card numbers to the Blackbaud *Payment Service* for secure storage.

**Note:** To support data entry for credit card transactions processed externally, when you enter credit card numbers with four digits or fewer, other credit card information is not required.

- When you enter payment records in a revenue batch, the **Constituent Window** is available. The **Constituent Window** displays information about the constituent associated with the selected payment. For information about the **Constituent Window**, see [Constituent Window on page 71](#).

## Batch Entry Toolbar

As you enter information into a batch, you can use the toolbar ribbon to quickly find commands you need to complete a task. The tasks on the toolbar ribbon are unique to each batch type, and are grouped together under sections. Each section on the toolbar ribbon relates to a type of activity, such as **Configuration**, **Processes**, or **Messages**.



To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each task that is available in the current view.

To access a task on the toolbar ribbon, click the corresponding letter. To exit the shortcut key display mode, you can select **Esc**, or simply click your mouse.

To move quickly to the first field of the next batch row, click **CTRL ENTER** on your keyboard.

For revenue batches, the Main and Revenue tabs display and help categorize tasks related to each area.

## Batch Data Entry Grid

Within the batch data entry grid, you can quickly access information about each record, add and edit records, and attach row comments. The tasks that display on the toolbar depend on the batch type. We recommend you familiarize yourself with the tasks on the toolbars as well as the various shortcut keys.

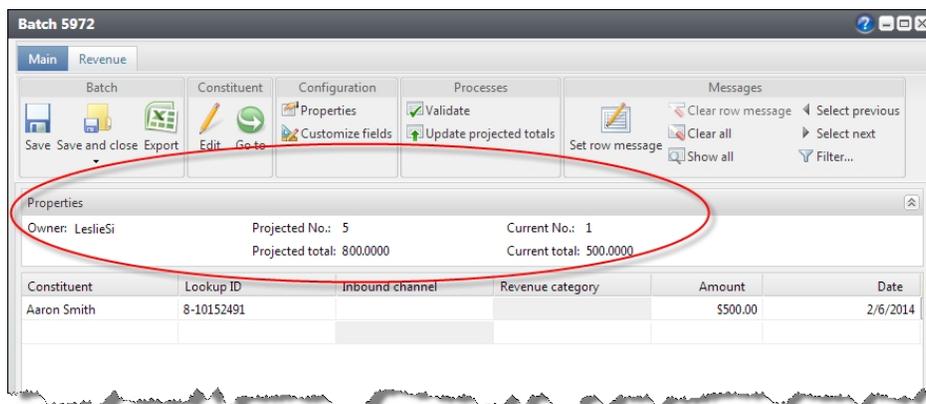
**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

In the batch data entry grid, each row of the spreadsheet that contains information becomes a new record or updates an existing record when you commit the batch to the database. The selected batch template defines which fields appear in the spreadsheet and the order in which they appear. When a column is not applicable to the record you enter, the field is disabled. For example, in a constituent batch, some fields for an individual constituent, such as **Gender** or **Birth date**, are not applicable to an

organization constituent. When you select "Organization" in the **Constituent type** field, the program disables all fields associated with individual constituents.

**Tip:** In the batch data entry grid, some fields also include a sub grid that displays several associated fields for data entry. For example, when you click in the **Phones** field in the batch data entry grid, a sub grid displays additional fields, such as **Phone type**, **Seasonal start**, and **Seasonal end**.

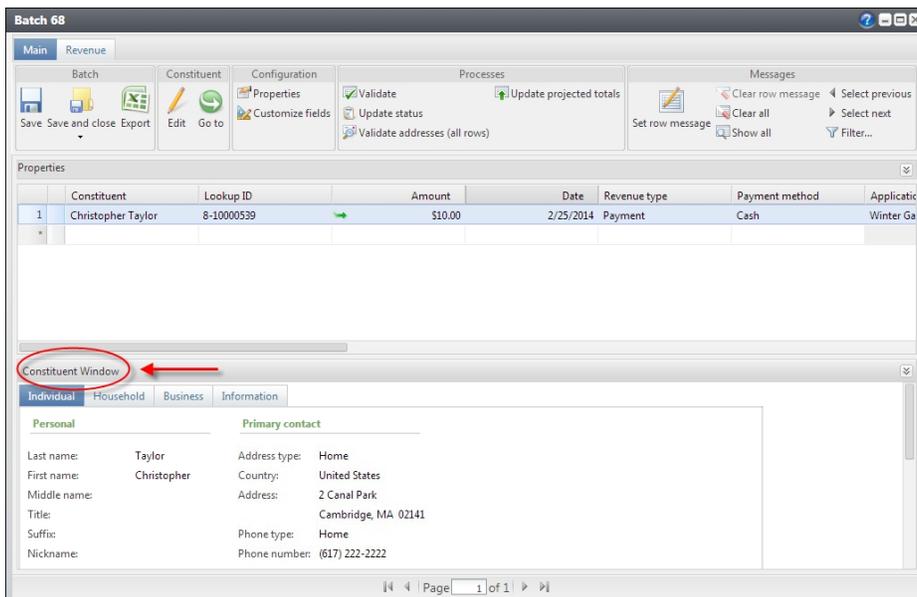
You can also review the properties of the batch, which include the owner, projections, and running totals. You add these properties when you add the batch to the database. The program tracks the current number of contributions entered and automatically updates the current properties of the batch. To view the properties of a revenue batch, click **Properties** below the toolbar. The Properties window displays above the data entry grid. You can also edit batch properties by clicking **Properties** in the toolbar.



## Constituent Window

When you enter transactions in a revenue batch, the **Constituent Window** displays information about the constituent and applications associated with the selected transaction.

To view the **Constituent Window**, at the bottom of the grid, click **Constituent Window**.



**Tip:** To view the record of a constituent included in a revenue batch, select the constituent's row in the data entry grid and click **Go to** on the toolbar. A new window opens where you can view and edit constituent details without losing any data in your batch window. When you finish with the constituent record, simply close the window and you return to the batch data entry grid.

To help you navigate through this information, the **Constituent Window** contains multiple tabs.

- [Constituent Information on page 72](#)
- [Revenue Application Information on page 72](#)

## Constituent Information

To view information about the constituent associated with the revenue, select the Individual tab, Organization tab, Group tab, or Household tab, depending on the type of constituent. This tab displays data from the record of the constituent associated with the selected revenue transaction such as name and primary contact information. The other information that appears depends on the type of constituent. For example, for an individual constituent, you can also view the constituent's marital status and gender. For an organization constituent, you can also view the constituent's industry and parent organization. For a constituent group or household, you can also view information about its members.

## Revenue Application Information

You can apply a payment to multiple applications. For example, a constituent may send a check to both pay for an event registration and donate a gift to your organization. To view information about the applications of a revenue transaction, select the Information tab. On this tab, you can view the applications associated with the transaction and the amount of the revenue applied to each. If the total of the application amounts exceeds the total amount of the transaction, the Balance (gift amount) application amount displays the difference in red.

## Batch Data Entry Tasks

The toolbar above the grid on the batch data entry screen contains buttons that represent common tasks for batch data entry.

### Delete a Row from the Batch Data Entry Grid

You can easily delete a row from the data entry grid of a batch. For example, you may need to delete a row because you accidentally entered the same record twice.

#### ➤ Delete a row from the data entry grid of a batch

1. On the batch data entry screen, select the rows to delete from the batch.
  - To select a single row, click the row number to the left of the row in the data entry grid.
  - To select multiple rows, press **SHIFT** on your keyboard as you click the row number to the left of each row; to select non-consecutive rows, press **CTRL** on your keyboard as you select each row.
2. Press **DELETE** on your keyboard. A message appears to confirm the deletion.
3. Click **Yes**. You return to the batch data entry screen.

### Export Batch Data Entry

You can easily export data entered in a batch for use in Microsoft *Excel*, such as to do a quick spot check of the data you entered in the batch.

#### ➤ Export batch data entry to a Microsoft Excel spreadsheet

1. On the batch data entry screen, click **Export** on the toolbar. The program opens the contents of the data entry grid in a Microsoft *Excel* spreadsheet.

**Note:** For revenue batches, **Export** appears on the Main tab of the toolbar.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

2. Specify a location and save the *Excel* spreadsheet. You return to the batch data entry screen.

### Add Solicit Codes in a Batch

Through a constituent batch, you can add solicit codes to constituent records. From the Solicit codes screen of a constituent batch, you can select a solicit code, start and end dates, and enter any relevant comments. You can also manage solicit codes on the Preferences tab of the constituent's

Communications page. For more information about adding constituent solicit codes outside of a constituent batch, see the *Constituents Guide*.

Solicit codes provide a convenient method to flag constituents as "exceptions to the rule" for your communications. These codes tell your organization when a constituent has certain rules to follow when you communicate. You can use these rules to exclude a constituent from a mailing process. Examples of solicit codes are "One solicitation annually," "Spring mailing only," "Do not email," and "Do not phone on weekends." To create solicit codes, from the *Marketing and Communications* page, click **Solicit codes**.

### ➤ Add solicit codes in a batch

1. On the batch data entry screen, click **Solicit codes** on the toolbar. The Solicit codes screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

2. In the **Solicit code** field, select the rule to assign to the constituent.

For example, when the constituent is not to receive email from your organization, select "Do not email." When you run a communications process and select to exclude constituents with this solicit code, the program automatically removes the constituent from the process.

3. In the **Start date** field, enter the date the solicit code begins.

4. To assign the solicit code to the constituent only temporarily, in the **End date** field, enter the date the solicit code ends. When the solicit code does not have an end date, leave this field blank.

For example, when you want to permanently assign the solicit code to the constituent, leave this field blank.

**Note:** When you run a mailing process, the program uses only solicit codes that are valid as of the run date to exclude constituents from the process.

5. In the **Comments** field, enter any notes about the constituent's solicit code as necessary.
6. Click **OK**. You return to the batch data entry screen.

Once you add solicit codes to a batch, you can return to the Solicit codes screen to edit solicit codes before committing the batch to the database.

## Set a Row Message

When you enter data into a batch, you can add a message for a particular row of the data entry grid. For example, an approver reviews a batch and notices a correction that needs to be made. The approver can set a message for the row with the error and send the batch back to the batch processor. The batch processor can use the row message to determine what to correct.

### ➤ Set a message for a row of batch data entry

1. On the batch data entry screen, select the row to add a message.
2. On the toolbar, click **Set row message**. The Set message for row screen appears.

**Note:** For revenue batches, **Set row message** appears on the Main tab of the toolbar.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

3. In the text box, enter the message for the row.
4. Click **OK**. You return to the batch data entry screen. To review the row message, click the icon on the row. The row message displays below the selected row.

**Note:** You can remove a row message from a batch. For information about how to clear one or all row messages from a batch, see [Clear a Row Message on page 75](#).

## Clear a Row Message

You can remove a row message when it is no longer applicable. For example, the batch processor receives a batch with a row of data entry with a message set about a correction to make. Once the processor corrects the batch, the message can be removed from the row. You can remove each row message one at a time, or you can remove all row messages from a batch at once.

- To clear a message from a single row of batch data entry, select the row and click **Clear row message** from the grid toolbar.
- To clear all row messages from a batch data entry screen, click **Clear all** from the grid toolbar.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

## Customize the Fields in a Batch

You can customize the fields and default settings included in a batch template. You can adjust the fields and default settings when you first add the batch or during the batch data entry process.

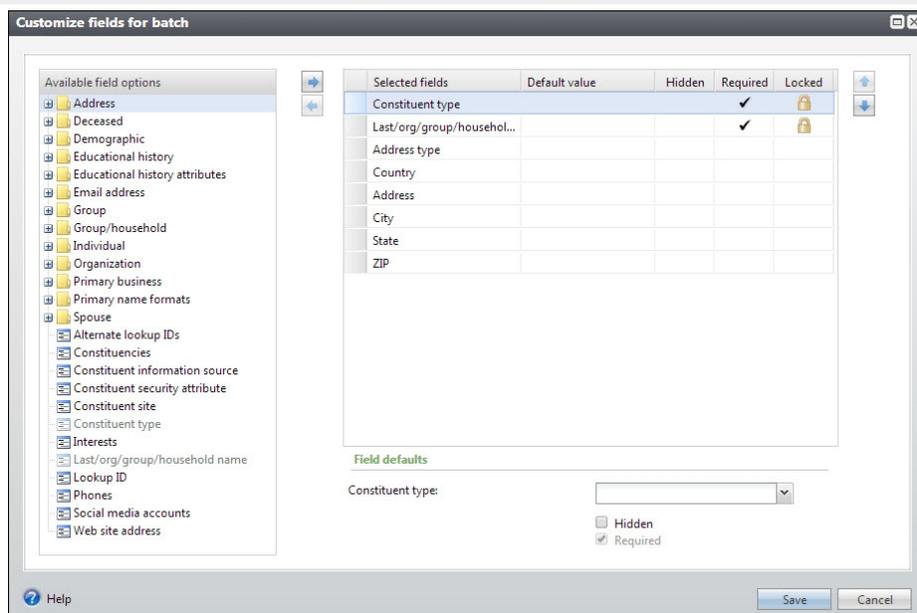
When you create a batch template, you assign security permissions to customize fields within a batch based on system roles. When you do not have rights to customize fields within a batch, the **Available field options** frame is disabled, and you can only edit field defaults. For more information about batch template security, see [Add a Batch Template on page 27](#).

## ► Customize the fields in a batch

1. On the batch data entry screen, click **Customize fields** on the toolbar. The Customize fields for batch screen appears.

**Note:** For revenue batches, **Customize fields** appears on the Main tab of the toolbar.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.



**Note:** You can also access the Customize fields for batch screen when you first add the batch to the database. On the Add a batch screen, in the **Batch template** field, select the batch template to customize and click **Field options**.

2. To change the default settings of a field in the batch, select the field in the **Selected fields** column and, in the **Field defaults** frame, select its default setting.
3. Add or remove fields in the batch or adjust the order of the fields in the batch as necessary.
  - To add a field to the batch, select the field in the **Available field options** box and click the right arrow button. The field appears in the **Selected fields** column. To set a default setting for the field, select it in the grid and, in the **Field defaults** frame, select its default setting.
  - To remove a field from the batch, select the field in the **Selected fields** column and click the left arrow button. The field is enabled in the **Available field options** box and no longer appears in the **Selected fields** column.
  - To adjust the order of new or existing fields in the batch, select the field to move in the **Selected fields** column and click the up or down arrow button.
4. Click **Save**. You return to the batch data entry screen.

## Direct Debit Return Rejections

The Direct Debit Return file you receive from your financial institution contains information about direct debit payments submitted for deposit. If the file contains a result code that matches a rejection code entered for the financial institution in *Constituents*, the program automatically matches the entry to the corresponding revenue record and marks the entry as rejected. The **Is rejected** checkbox in the Enhanced Revenue batch grid indicates which payments have been rejected. If you defined a default reason code for direct debit rejections, this code automatically appears in the **Adjustment reason** column. Otherwise, you can manually select a reason code for each rejected payment before you commit the batch.

When you commit a Direct Debit Return batch that contains rejections, the status of the matching revenue determines what occurs. If the rejected payments are currently in a revenue batch that has not been committed, these payment do not post. Instead, they appear in a batch exception report. If the revenue batch has been committed but has not yet been posted to the General Ledger, the program changes the amount and GL distributions on the revenue record to zero, adds **Direct debit deposit is rejected** to the **Payment method** section of the record, and displays the rejection's result code. If the revenue batch has been committed and the transactions posted to the General Ledger, the program updates the post status on the revenue record to "Posted (Adjustment pending)," changes the GL distributions to zero, and adds a **GL unposted adjustments** section to the GL Distributions tab. This section displays the reversals applied to the revenue record as a result of the rejection.

**Note:** If the revenue that matches the rejected transaction in a Direct Debit Return file has been posted to the General Ledger, you must select a reason code in the **Adjustment reason** column of the Direct Debit Return batch file before you can commit the batch. If you previously selected a default reason code for rejections, this code automatically appears in the column.

For information about how to define rejection codes for financial institutions, see the *Constituents Guide*. For information about how to add a default reason code for direct debit rejections, see the *Administration Guide*.

## Revenue Batch Data Entry Tasks

When you enter data in an enhanced revenue batch, the toolbar on the Main and Revenue tabs of the data entry screen include additional buttons that represent common tasks for revenue batch entry.

**Tip:** For revenue batches, to associate inactive appeals to a transaction record, you must select **Include inactive** on the Revenue Appeal Search screen.

## Update the Projected Totals of a Revenue Batch

When you add a revenue batch, you can enter a projected number of transactions and a projected monetary total of those transactions. While these projections are not required, we recommend you enter these values to help validate the data entered in the batch. As you enter data in the batch, you may determine the projections you previously entered are not accurate. When this occurs, you can easily update projections to match the current data entered in the batch.

From the Main tab toolbar of the batch data entry screen, click **Update projected totals**. The program updates the **Projected No.** and **Projected total** fields to match the **Current No.** and **Current total** fields, and displays a message to inform you of the change. To return to the data entry screen, click **OK**.

## Apply a Payment in a Revenue Batch to Outstanding Commitments

Constituents can use any payment method to pay outstanding pledges, recurring gifts, and event registrations. When you add a constituent's payment in a revenue batch, you can apply it to an outstanding commitment, such as a pledge or recurring gift. When you add a payment to the batch for a constituent who has outstanding commitments, the program automatically attempts to apply the payment to a commitment of the same revenue amount.

Constituents can make payments toward their own commitments or toward commitments made by other constituents. For example, Georgia Thomas pledges \$100 to your organization. Because of a change in her financial situation, she can no longer pay the pledge. Georgia's aunt, Lisa Haas, is also a constituent in your database and agrees to pay Georgia's pledge. When you add the payment record, you make it in Lisa's name and apply it to the balance of Georgia's commitment.

**Show Me:** [Watch this video to learn how to apply a payment to a commitment in Batch](#)

### ➤ Apply a payment in a batch to an outstanding commitment

1. On the revenue batch data entry screen, in the data entry grid, select the payment to apply to an outstanding commitment. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Apply**. The Apply to commitments screen appears. The grid displays the outstanding commitments for the constituent. The second grid on this screen is altered slightly when the commitment is associated with a sponsorship.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

Apply to commitments for Max G. Taylor

Payment amount: \$500.00    Apply by:  Amount  
 Unapplied amount: (\$140.00)     Percent

Search: Designation, constituent name, or any amount column    Apply    Reset

Date due: From: mm/dd/yyyy    To: mm/dd/yyyy

Application	Constituent	Description	Balance	Date due	Amount due	Applied amount	Applied percent	Overpay
Pledge	Max G. Taylor	CAMP for Max G. Taylor	\$500.00	6/17/2014	\$500.00	\$500.00	100.00	
Event registration	Max G. Taylor	Golf Tournament - 2004	\$125.00	7/24/2014	\$125.00	\$125.00	25.00	
Event registration	Max G. Taylor	Starlight Concert	\$15.00	8/25/2014	\$15.00	\$15.00	3.00	

Page 1 of 1    Displaying records 1 - 3 of 3

Additional applications	Applied amount	Applied percent	Designation	Other type	Opportunity	Revenue category	Campaigns
*							

Help    OK    Cancel

**Tip:** To view a large amount of information at one time, click the maximize button in the top right corner of the screen. Once maximized, to return to the default screen size, click maximize again. To manually resize the screen, you can click and drag any corner of the screen.

- Use the search filter options to filter the list of the constituent's existing commitments based on designation lookup ID or name, constituent name, or amounts. You can also filter across due dates.

**Note:** This filtering only searches through the constituent's list of existing commitments. To search for commitments owned by other constituents, click **Load commitments** on the action bar.

- In the **Payment amount** field, the total sum of the payment appears. If necessary, enter the total sum of the payment.

**Note:** When recording a payment in an enhanced revenue or revenue update batch, the **Apply by** options appear at the top of the screen. These options allow you to select how you want revenue applied: by **Amount** or **Percent**. When you select **Amount**, the amount allocated displays in the **Applied amount** column of the grid; when you select **Percent**, the percent allocated displays in the **Applied percent** column of the grid.

**Note:** On the Apply to commitments screen for an enhanced revenue batch, a green arrow appears next to a payment that has been applied to an outstanding commitment.

- The **Unapplied amount** field displays the remainder of the payment amount available to apply to commitments. When you apply an amount of the payment to a commitment, the program automatically updates this field.
- Add new commitments as necessary.
  - To add an unapplied matching gift claim for an organization constituent, click **Add** and select **Unapplied MG** on the action bar. The Record an unapplied matching gift screen appears so you can specify the amount to apply to the matching gift and to which designation. This scenario may occur when the organization sends a payment for a matching gift claim that is not yet in the database.

For information about matching gifts and the Record an unapplied matching gift screen, see the *Revenue Guide*.

- To add a pledge for the payment, click **Add** and select **Pledge** on the action bar. The Add a pledge screen appears so you can add the pledge. This scenario may occur when the constituent sends a payment for a pledge that is not yet in the database.

For information about pledges and the Add a pledge screen, see the *Revenue Guide*.

- To add a membership for the payment, click **Add** and select **Membership** on the action bar. The Add memberships screen appears so you can add the membership. This scenario may occur when the constituent sends a payment for dues for a membership that is not yet in the database.

For information about membership and the Add memberships screen, see the *Memberships Guide*.

- To add an event registration for the payment, click **Add** and select **Event registration** on the action bar. After you search for and select the event for which to register the constituent, the Add a registrant screen appears. This scenario may occur when the constituent sends a payment for a registration that is not yet in the database.

**Note:** When you first add an event registration in a batch, the Event Search screen appears so you can select the event. For subsequent new event registrations in the batch, the Event Selection screen appears and displays the previously selected event. To add a registration for the same event, click **OK**. To use a different event, search for the event and click **OK**.

**Note:** For information about event registration and the Add a registrant screen, see the *Events Guide*.

After you add the commitment, you return to the Apply to commitments screen. In the grid, the new outstanding commitment appears.

**Note:** Once you add a commitment such as a pledge or event registration on the Apply to commitments screen, you can edit the commitment. To adjust the commitment, select it in the grid and click **Edit** on the action bar. In an enhanced revenue batch, you can edit existing pledge commitments. To edit an existing pledge, select it in the grid and click **Edit** on the action bar. Once you save the pledge, your changes are immediately applied to the pledge record in the database.

**Warning:** When you add a commitment such as a membership or an event registration for a revenue transaction and later edit the constituent associated with the transaction, you must also edit the commitment as necessary.

7. To apply the payment to the commitments of another constituent, click **Load commitments** on the action bar. The Constituent (with commitment details) Search screen appears so you can search for and select the constituent with the commitments to which to apply the payment. After you select the constituent, you return to the Apply to commitments screen. In the grid, the outstanding commitments of the selected constituent appear.
8. In the **Applied Amount** column of the grid, enter how much of the payment amount to apply to each commitment.
  - When you click **Auto apply** and the total payment amount exceeds the total amount due for the commitments, the remainder of the payment amount appears in the **Unapplied amount** field.
  - When you click **Auto apply** and the total amount due exceeds the payment amount, a commitment receives a partial payment from the applied payment amount.
9. When you apply an amount of the payment to a pledge and the applied amount is greater than the installment amount, in the **Overpayment to** column, select whether to apply the difference to the next installment or overall balance of the pledge. When you select "Pledge balance," the program applies the overpayment amount to the final scheduled installment of the pledge.
10. In the **Unapplied amount** field, any remainder of the payment amount not applied to commitments appears. To apply the balance toward a donation, an unapplied matching gift claim, or a payment type of Other:
  - a. In the **Additional applications** column, select the type of application to apply the balance toward.
  - b. In the **Applied amount** column, enter the amount of the balance to apply toward the selected application type.

- c. In the **Designation** column, search for and select the designation to which to apply the application amount.
  - d. When you apply the balance toward a payment type of Other, in the **Other type** column, select the type of payment to apply the balance toward.
11. Click **OK**. You return to the batch data entry screen.

## Edit Installment Information for a Commitment in a Revenue Batch

When you enter a commitment such as a pledge or recurring gift in a batch, you can view and edit its installment schedule. On the Installment schedule screen, you view the date and amount of the transaction. You can also view or edit the payment frequency, number of installments, date payments are due, and date payments start. The program automatically calculates the installment schedule for the contribution, based on the installment and schedule details you enter in the batch.

### ► Edit the installment schedule for a commitment in a batch

1. On the batch data entry screen, in the data entry grid, select the revenue transaction to edit. For information about how to access a batch, see [Batch Search on page 66](#).

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

Date	Amount	Receipt amount
2/11/2014	\$41.67	\$41.67
3/11/2014	\$41.67	\$41.67
4/11/2014	\$41.67	\$41.67
5/11/2014	\$41.67	\$41.67
6/11/2014	\$41.67	\$41.67
7/11/2014	\$41.67	\$41.67
8/11/2014	\$41.67	\$41.67
9/11/2014	\$41.67	\$41.67

2. Review the date and amount of the selected contribution. If required, adjust the installment schedule for the contribution.
3. The **Pledge date** or **Recurring gift date** field displays the date entered in the **Date** field on the data entry screen.
4. The **Pledge amount** or **Recurring gift amount** field displays the value entered in the **Amount** field on the data entry screen.
5. When the selected batch template includes the **Installment frequency** field, the **Frequency** field displays the frequency selected in the **Installment frequency** field on the data entry screen. When no installment frequency is specified in the batch, "Annually" appears by default. Enter the installment frequency as necessary.

6. When the selected batch template includes the **Installment start date** field, the **Starting on** field displays the date entered in the **Installment start date** field on the data entry screen. When no start date is specified in the batch, the date you enter the contribution in the batch appears by default. Enter the date of the first installment as necessary.
7. When the **Revenue type** is Recurring gift, this field appears. When the selected batch template includes the **Installment end date** field, the **Ending on** field displays the date entered in the **Installment end date** field on the data entry screen. Enter the date of the final installment as necessary.
8. When the **Revenue type** is Pledge, the **No. installments** field appears. When the selected batch template includes the **No. installments** field, the **No. installments** field displays the value entered in the **No. installments** field on the data entry screen. When the number of installments is not specified in the batch, "1" appears by default. Enter the number of installments as necessary.

**Note:** The maximum number of installments for a pledge is 150.

9. When the **Revenue type** is Pledge, the **Installment amount** field appears. The program uses the values entered in the **Amount** field, **Installment frequency** field, and **No. installments** field in the batch to calculate the amount of each installment.
10. In the grid, the **Date** column displays the date each installment is due. The program calculates each installment date, using the values entered in the **Installment start date** field, **Frequency** field, and the **No. installments** or **Installment end date** field on the data entry screen.  
When no installment start date is specified in the batch, the date you enter the contribution in the batch appears by default.
11. In the grid, the **Amount** column displays the amount of each installment. For a pledge, the program uses the values entered in the **Amount** field, **Installment frequency** field, and **No. installments** field in the batch to calculate the amount of each installment.
12. In the grid, the **Receipt amount** displays the total receipt amount for each payment.
13. Click **OK**. You return the batch data entry screen.

## Specify Benefits for a Payment in a Revenue Batch

Benefits are gifts your organization gives to a constituent, and depend on the revenue received from the constituent. Typically, the appeal used to solicit the payment automatically specifies the benefits the constituent receives. For example, when a constituent makes a payment in response to a phonathon, you may send a free shirt or newsletter in appreciation.

When you give benefits to a constituent in response to revenue the constituent provides, you can record the benefits when you add the payment through a batch. Calculating the monetary amount of a benefits package is important. For example, receipts for all payments associated with a benefits package should take into account the monetary value of the benefits received. When your organization gives a T-shirt and button to a constituent, the cost to your organization may be \$15. When you add a benefit to a payment, add benefit details specific to the payment to calculate the total value of the benefits the constituent receives.

**Note:** Some benefits may have a value equal to a percentage of the revenue amount. When you add revenue and add benefits, the benefit values are calculated and deducted from the receipt amount.

## ➤ Specify benefits for revenue in a batch

1. On the batch data entry screen, in the data entry grid, select a revenue transaction to specify benefits. For this example, select a payment. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Benefits**. The Benefit details screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

**Benefit details**

Waive benefits  
 Total benefits

Money benefits: Reset benefits

Benefit	Quantity	Unit value	Total value	Details
Tote	1	\$9.00	\$9.00	
*				

Percent benefits: Recalculate amounts

Benefit	Amount	Percent value	Total value	Details
*				

Total benefit amount: \$9.00

3. Depending on the selected appeal, the payment may have default benefits associated with it. Select whether to waive the associated default benefits.
  - When the constituent declines the benefits associated with the payment, select **Waive benefits**. The grid is disabled.
  - When the constituent receives benefits for the payment, select **Total benefits**. The grid is enabled and displays the default benefits associated with the payment.

**Note:** When you select **Waive benefits**, no benefits are added to the payment. When a payment is associated with multiple default benefits and the constituent declines only some of the default benefits, select **Total benefits** and edit the grid to remove the unwanted benefits.

4. When you select **Total benefits**, enter or update the benefit information in the grid as necessary.

- a. In the **Benefit** column, the default benefits associated with the payment appear. To add or update a benefit, use the Benefit Search screen to search the benefits catalog. When you locate the benefit and click **Select**, the program enters the name in the **Benefit** column.

A constituent may receive multiple benefits for the same payment. Enter each benefit received on a separate row of the **Benefit** column.

**Note:** To select a benefit, it must be included in the benefits catalog in your database. The benefits catalog is managed in *Fundraising*.

- b. When you add a benefit, In the **Quantity** column, the program automatically enters a count of "1" for the benefit. When necessary, update this value to specify the quantity of each benefit the constituent receives.
- c. In the **Unit value** column, the program automatically enters the value of the benefit, as specified in the benefits catalog. When necessary, update the monetary value of a single unit of the benefit.

When the benefit has a value equal to a percentage of the revenue amount, in the **Percent value** column, the program automatically enters the percent value of the benefit. When necessary, update the percent value. You can enter the amount to use in the percent calculation and click **Recalculate amount**. The program automatically calculates the percent value of the benefit, but first subtracts the value from any monetary benefits.

When you enter benefit information in the grid, the program automatically calculate the **Total value** of each benefit.

- d. In the **Details** column, enter any notes about the benefit the constituent receives. For example, record the size and color of a T-shirt.

**Note:** When you change the default benefits associated with a payment, you can revert to the default benefit information. For example, you may want to remove unwanted benefits. To undo changes made to the default benefit information, select **Total benefits** and click **Reset benefits**.

5. Click **OK**. You return to the batch data entry screen.

## Apply a Transaction in a Revenue Batch to Multiple Designations

Designations specify the campaigns and initiatives, or overall and specific purposes, for a transaction. When you receive a transaction, you must specify how you plan to use the revenue. It is important to enter this information for each transaction your organization receives so you can develop statistics to determine the financial progress of the designation.

When you add a transaction to a batch, you can distribute a single payment amount between multiple designations. When you split a transaction, you must specify the amount to apply to each designation. For example, a constituent may send in a payment to pay for membership dues and to donate to a campaign. You can split the payment so that a specific amount is applied toward membership dues and the rest is applied to the campaign.

**Note:** In a revenue batch, you can use **Split designations** to apply only pledges and recurring gifts to multiple designations. For information about how to apply a payment to multiple designations, see [Apply a Payment in a Revenue Batch to Outstanding Commitments on page 78](#).

### ➤ Split designations for a transaction in a batch

1. On the batch data entry screen, in the data entry grid, select the transaction to apply to designations. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Split designations**. The Split designations screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

**Split designations**

Total amount: \$500.00      Apply by:  Amount  
 Unapplied amount: \$0.00       Percent

Designation	Amount	Percent
LIBRARY FURNITURE	\$250.00	50.00
LIBRARY BOOKS	\$250.00	50.00
*		

Distribute evenly

Help      OK      Cancel

The **Total amount** field displays the amount of the transaction you can apply to designations.

The **Unapplied amount** field displays the remainder of the amount available to apply to designations. When you apply an amount to a designation, the program automatically updates this field.

**Note:** On the Split designations screen, the **Apply by** options appear at the top of the screen. These options allow you to select how you want the designations applied: by **Amount** or **Percent**. When you select **Amount**, the **Amount** column of the grid is enabled and displays the amount allocated; when you select **Percent**, the **Percent** column of the grid is enabled and displays the percent allocated.

3. In the **Designation** column, search for and select the designations to apply the total amount. Enter each designation in a separate row.
4. When the **Amount** column is enabled, enter how much of the total amount to apply to each designation. To split evenly across all designations, click **Distribute evenly**.
5. When the **Percent** column is enabled, enter how much of the total percent to apply to each designation. To split evenly across all designations, click **Distribute evenly**.

- Click **OK**. You return to the batch data entry screen. In the **Designation** field, "<split>" appears.

## Add a Note in a Revenue Batch

Notes are excellent tools that provide additional insight about a transaction in a batch. Once you add a note, you can select to open the note to view or update its information. When the revenue batch processing manager commits the batch to the database, a note appears on the Documentation tab of the payment record.

### ➤ Add a note in a revenue batch

- On the revenue batch data entry screen, in the data entry grid, select the transaction to add a note. For information about how to access a batch, see [Batch Search on page 66](#).
- From the Revenue tab toolbar, click **Add note**. The Add note screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

The screenshot shows a window titled "Add note" with a close button (X) in the top right corner. The window content is as follows:

- Payment for Aaron Taylor** (header)
- Type:** Planned Giving (dropdown menu)
- Date:** 9/5/2014 (text field with calendar icon)
- Title:** Donor Preferences (text field)
- Author:** Abby Smith (text field with search icon)
- Notes:** Aaron prefers to donate to health care causes. (text area)
- Bottom left: Help (with question mark icon)
- Bottom right: Save (blue button), Cancel (grey button)

- In the **Type** field, select the applicable type of note, such as "Planned Giving."

**Note:** Your System Administrator designates the options available in the **Type** field list. To add options to this list, consult your System Administrator.

- In the **Date** field, enter the date you add the note. You can also select from a calendar.
- In the **Title** field, enter a description to help identify the note, such as "Donor Preferences."
- In the **Author** field, search for the author of the note.
- In the **Notes** field, enter any information or details about the transaction.

8. Click **OK**. You return to the previous page.

## Edit a Note in a Revenue Batch

In a revenue batch, you can edit existing notes as necessary.

### ➤ Edit a note in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select the transaction to edit a note. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Edit note**. The Edit note screen appears.
3. Make any necessary edits and click **Save**. You return to the previous page.

## Add a Payment to a Pledge in a Revenue Batch

When you add a pledge to a revenue batch, you can enter and apply a payment to the pledge at the same time. This saves you the duplicate effort of entering the same information for multiple transactions in the batch. When you add and apply a payment toward the current pledge in the batch, the payment does not appear on the batch data entry screen. However, the program adds the payment to the database during the committal of the batch.

### ➤ Add a payment to a pledge in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select the pledge to apply a payment. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Payment**. The Payment for pledge screen appears. The items on this screen are the same as the Apply to commitments screen. For information about the items on this screen, see [Apply a Payment in a Revenue Batch to Outstanding Commitments on page 78](#).

Description	Balance	Amount due	Payment date	Date due	Applied
Pledge for Charlie Taylor	\$100.00	\$100.00	2/15/2014	2/15/2014	\$100.00

3. The grid displays information about the pledge selected in the batch. In the **Payment amount** field, enter the amount of the payment to apply to the pledge.
4. Click **OK**. You return to the batch data entry screen.

**Note:** When you add a payment to a pledge in a batch, the payment entered does not appear in the grid on the batch data entry screen. However, the program automatically creates the payment and applies it to the pledge during the batch committal.

## Add a Matching Gift Claim for a Transaction in a Revenue Batch

Companies can donate a payment to match a payment donated by an employee or corporate partner. For example, when an employee donates \$100 to your organization, you may receive an additional matching gift from the employer. Organizations can also match gifts donated by other organizations; however, an organization cannot match its own gift. When you add a payment to a revenue batch, you can also set up a matching gift claim for the payment as necessary.

We recommend you enter the amount of the payment in the batch before you select to add a matching gift claim for it. The program automatically uses the amount of the payment in the batch and the matching gift conditions specified on the organization constituent record to calculate the matching gift claim amount.

**Note:** When an organization matches a payment, you we recommend you track it as a matching gift claim until you receive the payment from the organization.

In an Enhanced Revenue Batch, you can add multiple matching gift claims for a transaction. For example, a constituent may have matching gift relationships with multiple organizations.

### ➤ Add a matching gift claim for a transaction in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select the transaction associated with the matching gift claim. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Matching gifts**. The Add matching gift claims screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

Matching organization	Relationship	MG condition type	Amount	Date	Designation
Abc Learning Center-Do...	Employee		\$100.00	5/8/2014	CAMPEXCL

**Matching gift condition summary**

Matching factor:	1.00	Relationship types:	
Min match per gift:	\$10.00	Revenue type:	Gift
Max match per gift:	\$1,000.00	Matching amount:	Tax deductible portion only
Notes:	Will match only for full-time employees.		

3. In the **Matching organization** field, search for and select the organization constituent that matches donations from the constituent.
4. In the **Relationship** field, select the constituent's relationship to the matching organization.

**Tip:** You can add a new relationship directly from the **Relationship** field. From the Add relationship screen that appears, you can specify relationship details and click **Save**. Note that when you click **Save**, the information saves even though you have not yet committed the batch.

5. In the **MG condition type** field, select the matching gift condition applicable to the constituent's relationship with the matching organization. Under **Matching gift condition summary**, the conditions for the selected condition type, as entered on the organization's constituent record, appear.
6. In the **Amount** field, the amount of the matching gift claim appears. The program calculates the amount using the amount entered for the payment in the batch and the matching gift conditions specified on the constituent record of the selected organization. Enter or edit the amount of the claim as necessary.

**Warning:** When no amount has been entered for the payment in the batch data entry grid, a zero may appear in the **Amount** field on the Add matching gift claims screen.

7. In the **Date** field, enter the date to associate with the matching gift claim. When you do not enter a date, the current date appears by default.
8. In the **Designation** field, the designation entered for the payment in the batch appears. When a designation has not been entered for the payment yet, search for and select the designation to receive the payment.
9. To apply the matching gift claim to multiple designations, click **Split designations**. For more information about split designations, see [Apply a Transaction in a Revenue Batch to Multiple Designations on page 84](#).
10. Click **OK**. You return to the batch data entry screen.

## Specify Tributes for a Payment in a Revenue Batch

You can track detailed information about revenue given in honor, memory, or celebration of an individual or organization. When you enter transactions in a revenue batch, you can designate revenue to specific tributes. For example, your organization sets up a tribute for a constituent. When you receive revenue on behalf of the constituent, you can designate the revenue to the tribute when you enter the transaction into a batch.

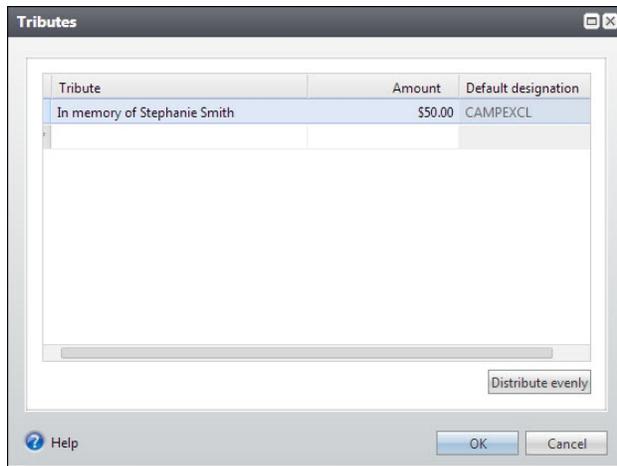
For more information about tributes, see the *Constituents Guide*.

### ➤ Specify the tributes for a payment in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select the transaction associated with the tribute. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Tributes**. The Tributes screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click

the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.



- In the **Tribute** column, search for and select the tribute to designate for the payment. After you locate the tribute, its name appears in the **Tribute** column.  
You can designate multiple tributes for the same payment. Enter each tribute on a separate row of the **Tribute** column.
- In the **Amount** column, enter how much of the payment to designate to each tribute. The amount applied to tributes cannot be greater than the total payment amount.  
To divide the payment amount evenly across multiple tributes, click **Distribute evenly**.
- The **Default designation** column displays the tribute designation. Your selection in the **Tribute** column determines the default designation. Note that you cannot change the entry in the **Default designation** column.

**Note:** When you do not select a designation for the payment before designating tributes, the default designation automatically appears in the **Designation** field for the payment on the batch data entry screen. When you designate multiple tributes for the payment, "<split>" appears.

- Click **OK**. You return to the batch data entry screen.

## Specify Recognition Credits for a Transaction in a Revenue Batch

Recognition credits provide flexibility for crediting constituents for the transaction. For example, you can credit additional constituents for the revenue and decide how much credit each constituent receives. You can also recognize a donor for an amount that is greater than the revenue amount or lower than the revenue amount. Lastly, you can recognize donors for a portion of the transaction over multiple periods of time. Recognition credits are associated with revenue. However, due to the flexibility of recognition credits, it is important to distinguish recognition credits from revenue. When you add a transaction in a revenue batch, you can specify its recognition credits.

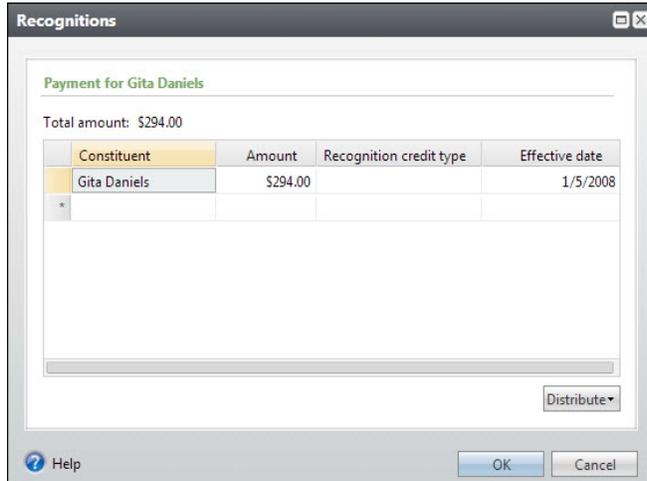
**Tip:** You can specify default recognition options for anonymous payments as well as payments made to commitments. You work with these default options on the Recognition Settings page in *Revenue*. From *Revenue*, click **Recognition settings** under **Configuration**.

### ➤ Specify recognition credits for a transaction in a revenue batch

1. On the batch data entry screen, in the data entry grid, select the revenue transaction to assign recognition credits. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Recognitions**. The Recognitions screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

**Note:** For a payment with multiple applications of donations, unapplied matching gift payments, or "Other" payment types, the Recognitions screen displays the applications of the payment. Select the application to assign recognition credits and click **Assign recognitions** on the action bar. The Recognitions screen for the application appears.



3. The **Total amount** field displays the amount of the payment available to apply as recognition credit.
4. The first row of the grid displays the constituent associated with the transaction in the batch. You can assign recognition credit to multiple constituents for the same transaction. For example, when a constituent requests that his spouse receives recognition for a payment, you can assign the appropriate recognition.

In the **Constituent** column, you can search for and select a constituent to receive recognition for the transaction. Enter each constituent on a separate row of the **Constituent** column.

5. In the **Amount** column, enter the amount to credit each constituent. When you give full credit to the recognition credit recipient, both the recipient and the giver of the payment receive full credit for the payment without duplicating the payment in your database.

When you enter multiple recognition credit recipients, specify how much of the payment amount to credit each constituent. To easily distribute the recognition credit between multiple constituents, click **Distribute** and select **Evenly** or **Full amount to all**.

- To distribute the payment amount evenly between the multiple constituents, select **Evenly**. Each constituent receives a recognition credit for an equal share of the payment amount. For example, when you select **Evenly** to divide the total payment amount between two recognition credit recipients, each constituent receives credit for half of the total amount.
  - To apply a recognition credit to each constituent for the full payment amount, select **Full amount to all**. Each constituent receives a recognition credit for the total amount.
6. In the **Recognition credit type** column, select the type of recognition credit each constituent in the grid receives. For example, when the spouse receives recognition for revenue given by a constituent, assign the spouse a recognition credit type of "Spouse."
  7. In the **Effective date** column, enter a date to associate with the recognition credit. For one-time payments, this date is typically the same as the revenue date.

When you distribute a large recognition credit over time, the effective date is important. For example, Kathleen Bently donated a \$50,000 gift. Your organization agrees to recognize her gift at the \$10,000 Honor Roll level for the next five years. The effective date for the first year is the same as the revenue date. The effective date for the next four years increases by one year.

When you add a recurring gift, the revenue transfers to your organization only when a recurring gift payment is made. Therefore, the effective date does not apply for recurring gifts, but instead for recurring gift payments.

8. Click **OK**. You return to the batch data entry screen.

## Specify Solicitors for a Transaction in a Revenue Batch

When your organization receives revenue because of the work performed by a solicitor, you can credit the solicitor on the payment record for the full or partial payment amount. For example, during an annual phonathon, a solicitor calls a constituent to ask for a donation. When the constituent makes a donation, you can give credit to the solicitor when you add the payment to a batch. You can give credit to a solicitor on a payment record to track the overall performance of your solicitors.

When you define default credit rules for solicitors in *Prospects*, the program automatically credits each solicitor associated with the fundraising plan or funding request based on the distribution you selected. For information about how to create default credit rules, see the *Prospect Configuration Guide*.

### ➤ Specify solicitors for a transaction in a batch

1. On the batch data entry screen, in the data entry grid, select the transaction to credit a solicitor. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Revenue tab toolbar, click **Solicitors**. The Solicitors screen appears.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

**Note:** For a payment with multiple applications of donations, unapplied matching gift payments, or "Other" payment types, the Solicitors screen displays the applications of the payment. Select

the application to assign solicitors and click **Assign solicitors** on the action bar. The Solicitors screen for the application appears.

**Solicitors**

Payment for John T. Smith

Total amount: \$500.00 Reset solicitors

Solicitor	Amount
Patricia Payne	\$250.00
Cynthia Davis	\$250.00
*	

Distribute

Help OK Cancel

- In the **Solicitor** column, search for and select the solicitor to receive credit for the revenue. After you locate the solicitor, the name appears in the **Solicitor** column.

**Note:** When you define default credit rules for solicitors, each solicitor associated with the fundraising plan or funding request automatically appears in the **Solicitors** grid.

You can credit multiple solicitors for the same application. Enter each solicitor on a separate row of the **Solicitor** column.

- In the **Amount** column, enter how much of the total amount to credit each solicitor.
- When multiple solicitors receive credit for the payment, specify how much of the payment amount to credit each solicitor.

**Note:** When you credit multiple solicitors for the same revenue, the total distributed credit does not need to equal the total amount. However, you cannot credit a single solicitor for more than the total amount.

To easily distribute the credit between multiple solicitors, click **Distribute** and select **Evenly** or **Full amount to all**.

- To distribute the payment amount evenly between the multiple solicitors, select **Evenly**. Each solicitor receives a credit for an equal share of the payment amount. For example, when you

select **Evenly**, to divide the total payment amount between two solicitors, each solicitor receives credit for half of the total amount.

- To credit each solicitor for the full payment amount, select **Full amount to all**. Each solicitor receives credit for the total amount. For example, when you select **Full amount to all**, to divide the total payment amount between two solicitors, each solicitor receives credit for the total amount of the payment.
6. To reset solicitor information, click **Reset solicitors**.
    - For revenue not associated with a major giving opportunity, click **Reset solicitors** to delete the solicitors and credit amounts you added to the grid.
    - For revenue applied to a major giving opportunity, click **Reset solicitors** to display the solicitors associated with the opportunity and reset the credit amounts for each solicitor to those defined by the default credit rules.
  7. Click **OK**. You return to the batch data entry screen.

## Add or Update a Constituent Record in a Revenue Batch

For Enhanced Revenue Batches, you can add or update the constituent record associated with a revenue transaction.

### ➤ Add a constituent in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, enter a constituent's name or lookup ID. The Batch Revenue Constituent Search screen appears. For information about how to access a batch, see [Batch Search on page 66](#).
2. In the **Results** grid, click **Add** and select the type of constituent record to add, such as "Individual" or "Household." An Add screen appears.
3. On the tabs, enter information about the new constituent and click **Save**.

You return to the revenue batch data entry screen and the new constituent appears in the **Constituent** column. For more information about the fields on the Add screen, see the Constituents section of the help file or the *Constituents Guide*.

**Note:** The constituent record is not added to the database until you commit the batch.

### ➤ Update a constituent in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select a constituent's name or lookup ID. For information about how to access a batch, see [Batch Search on page 66](#).
2. From the Main tab toolbar, click **Edit**. An Edit screen appears.

**Tip:** You can also right-click anywhere in a row and select **Edit Constituent**.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

- Update the information on the tabs and click **Save**. You return to the revenue batch data entry screen.

For more information about the fields on the Edit screen, see the Constituents section of the help file or the *Constituents Guide*.

**Note:** The constituent record is not updated until you commit the batch.

## Batch Statistics Key Performance Indicator

From *Analysis*, you can create a key performance indicator (KPI) to view the effectiveness of batch data entry by an application user. When you create a Batch Statistics KPI, you select the user for whom to view activity and the type of batch and transactions – such as adds, changes, committals, or exceptions – to include. You can also select the start date of the batch activity to use to generate the KPI.

The screenshot shows a window titled "Add a KPI" with a close button in the top right corner. Below the title bar are five tabs: "General", "Criteria" (which is selected and highlighted in blue), "Preview", "Goal", and "History". The "Criteria" tab contains four input fields:
 

- "User:" followed by a text input field with a magnifying glass icon on the right.
- "Batch type:" followed by a dropdown menu.
- "Transaction type:" followed by a dropdown menu.
- "Start date:" followed by a date picker icon.

 The bottom of the window has a decorative, dark, textured border.

For information about how to add KPI instances, see the *Reports and KPIs Guide*.

## Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

### ➤ Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see [Customize the Fields in a Batch on page 75](#).

### ➤ Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

### ➤ Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see [Resolve Duplicate Constituents in a Batch on page 97](#).

### ➤ Account or account segment errors

Ensure the GL mapping is up-to-date or the segment is defined. For more information, see the *GL Setup Guide*.

## Validate a Batch

When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist. Before you update the status of a batch, we recommend you validate the batch to locate any data entry errors. When the program finishes its batch validation, a message appears to tell you the results of the validation. For each data entry error found, an exception is created and appears on the batch data entry screen. To submit or approve the batch without difficulty, correct any exceptions found.

### ➤ Validate the data entry of a batch

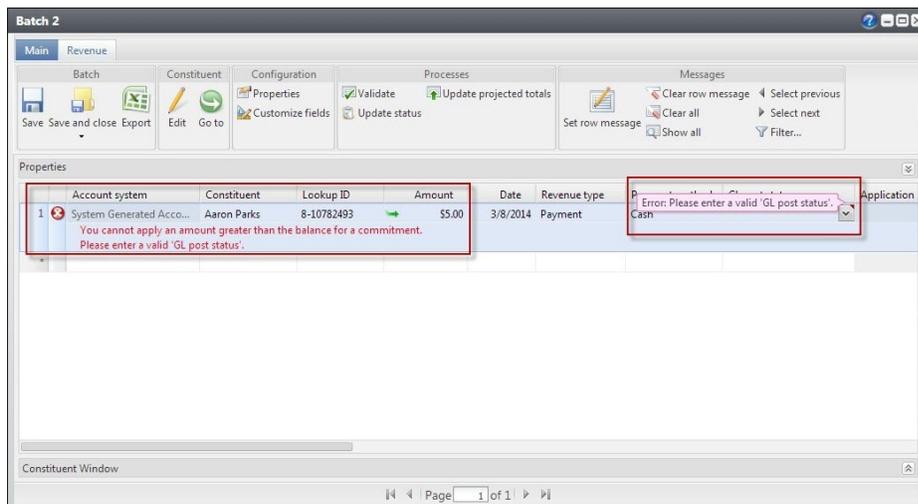
1. On the batch data entry screen, click **Validate** from the toolbar. The program automatically searches the data entry for exceptions.

**Note:** For revenue batches, **Validate** appears on the Main tab of the toolbar.

**Tip:** To quickly perform tasks on the toolbar ribbon using your keyboard, click **Ctrl + M**. Shortcut keys are then displayed over each feature that is available in the current view. To access a task, click the corresponding letter. To exit the shortcut key display mode, select **Esc**, or simply click your mouse.

2. When the validation is complete, a message appears to inform you of the validation results.
3. Click **OK**. You return to the batch data entry screen.

For rows with errors, click the red error icon to display the error message. Fields with errors display a red mark in the upper right corner of the field. You can also hover your mouse over the field to display the error message.



**Note:** For a constituent or revenue batch, the validation checks data about new constituents in the batch to verify the constituents are not already in your database. When the validation finds a possible duplicate constituent, a duplicate message appears under the constituent in the grid. To view information about the possible duplicate, click the message. For information about the duplicate record check, see [Resolve Duplicate Constituents in a Batch on page 97](#).

4. Update the batch data entry as necessary to resolve the exceptions. For more information about how to resolve exceptions, see [Resolve Batch Exceptions on page 101](#).

## Resolve Duplicate Constituents in a Batch

When you validate a Constituent, Revenue Batch, Revenue Update Batch, or Enhanced Revenue Batch, the program automatically runs a duplicate check to find any existing constituents that may match constituents in the batch. When the match confidence score for a pair of constituents falls within the range defined for possible matches, the program flags the incoming record as a potential duplicate and displays an exception in the batch data entry grid. To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record.

### ➤ Resolve duplicates in a Constituent Update or Enhanced Revenue batch

**Note:** The Possible duplicate matches screen appears for Constituent Update and Enhanced Revenue batch types. The Duplicate record check screen appears for Constituent, Membership Dues, Revenue, and Revenue Update batches. For more information about the Duplicate record check screen, see [Resolve duplicate constituents in Constituent, Membership Dues, and Revenue Update batches on page 100](#).

1. From a validated batch that contains exceptions, find a row in the grid with a yellow caution symbol. Click the symbol and a duplicate records message appears under the row.

**Note:** When an incoming constituent is similar enough to an existing constituent to qualify for an automatic update (their match confidence score is above the top matching threshold), but your organization's constituent update rules require manual review for certain fields, the batch

generates an exception that requires you to review the incoming fields and manually select which action to take. For information about constituent update rules, see [Constituent Updates on page 135](#)

	Account system	Constituent	Lookup ID	Amount	Date	Revenue type	Payment method	Application	Designation	GL post status
1	System Generated Acco...	Alex A. Smart	8-10000998	\$100.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
2	System Generated Acco...	Alexander A. Sma		\$200.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
3	System Generated Acco...	Al Smartovch		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
4	System Generated Acco...	Alan Sm		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
5	System Generated Acco...	Ala Sma		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
6	System Generated Acco...	Als T. Sma		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
7	System Generated Acco...	Al A. Sm		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
8	System Generated Acco...	Bobby Po		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted

2. Click the message. The Possible duplicate matches screen appears.

**Possible duplicate matches for Alexander Sma**

**Incoming constituent data**  
 Add this as a new record  
 Name: Alexander  
 title: A  
 Sma  
 suffix:  
 Date of birth: 1/1/1985  
 Address: 1 Smart st.  
 Boston  
 MA  
 12345-1111  
 Email: sma@gmail.com  
 Phone: (617) 888-5555

**92% match: Alex A. Smart**  
 Created: 12/16/2011; Last updated: 2/24/2012  
 Confirm this record as a match  
 Name: Alex  
 title: A  
 Smart  
 suffix:  
 Date of birth: 1/1/1975  
 Primary address: 1 Smart st.  
 Boston  
 MA  
 12345  
 Primary email: smart@gmail.com  
 Primary phone: (123) 456-7899

**6 potential matches found**

- 92%** Alex A. Smart  
 Lookup ID: 8-10000998  
 1 Smart st.  
 Boston, MA  
 12345
- 78%** Alex S. Sm  
 Lookup ID: 8-10001001  
 1 Smart road  
 boston, MA  
 12345
- 71%** Alexander S. Smartov  
 Lookup ID: 8-10001040  
 1 smartov st.  
 boston, MA  
 12345
- 56%** Alam Smar  
 Lookup ID: 8-10001019  
 1 Smar st.  
 boston, MA  
 12345

Help Skip Cancel

**Warning:** The Possible duplicate matches screen does not appear when you turn off matching via the **Enable/disable matching** configuration task in *Administration*.

The **Incoming constituent data** column displays information from the new record.

The **Potential Matches** column on the right lists all existing constituents in the database that are possible matches, ranked from the highest to lowest match confidence score. The percentage represents the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about the match confidence score, see the *Duplicate Constituents and Merge Tasks Guide*.

When you select a constituent in the **Potential matches** column, its information appears in the middle column so you can compare the incoming and existing records side-by-side. Black fields are exact matches. Red fields are similar but need careful review. After you compare the records, you can do one of the following:

- When you decide the incoming constituent is not a duplicate, click **Add this as a new record**. The screen displays the name and contact information for the new record. Click **Save** to create a new record, or if you change your mind, you can click **Don't add this as a new record** to return to the previous screen.

- When you decide the incoming constituent matches an existing constituent, click **Confirm this record as a match**. Additional options appear. You can evaluate each red field and decide what to do with the incoming data: When you select to add or update a field, it appears green in the existing constituent column. When you select to ignore a field, it appears stricken through in the incoming constituent column.
  - To discard all new or conflicting data from the incoming constituent, click **Ignore all**.
  - To automatically apply the constituent update rules, click **Use my organization's rules**. For example, when you click **Use my organization's rules**, the program automatically adds the incoming phone number to the existing record. As a reference, the list of update rules appears in the **Tips** column. For information about constituent update rules, see [Constituent Updates on page 135](#).
  - To add the name as an alias to the existing constituent, click **Add as alias**. To add the address, email, or phone number as primary or secondary on the existing constituent (rather than replace the existing value), click **Add** and select **Add as primary** or **Add as secondary**. When the incoming constituent has information that is blank on the existing constituent, you can click **Add** to add that data to the existing record.

**Note:** When the existing constituent has multiple addresses, phone numbers, or emails, use the drop-down to select which one to display.

**Note:** Click **more** to view the history of changes for each field on the address, phone number, or email.

- To discard the incoming value (neither add a new value nor update the existing value), click **Ignore**.
- To replace the existing name, address, email, or phone number with the incoming value, click **Update existing** and select whether to update all fields or to select individual fields to update. If you select **Update all name/address/email/phone number fields**, the program

moves all fields of that type to the existing constituent. If you select **Select fields to update**, the **Ignore** and **Update current** options appear so you can handle each field individually.

Click **Ignore all** to discard all incoming constituent data.

When you click **Use my organization's rules**, the program applies updates to conflicting fields according to these rules.

Click **Update existing** to overwrite the value on the existing constituent with the Incoming date.

Click **Ignore** to discard a specific Incoming value.

Click **Add** to add the incoming value to the existing constituent. For addresses, emails, and phones, you can also select whether they're primary or secondary.

**Red** = Incoming value conflicts with existing constituent  
**Green** = Incoming value will be updated or added to existing constituent  
**Stricken-through** = Incoming value will be ignored

Click **more** to view all names, addresses, emails, or phone numbers associated with the existing constituent.

3. Click **Save** to save your changes to the existing constituent, or if you change your mind, you can click **View other potential matches** to return to the previous screen.

**Note:** When you select **Automatically go to the next duplicate exception**, the program automatically opens the next record in the batch with possible matches when you click **Save**.

**Note:** For Enhanced Revenue batches, the constituent is updated automatically when you click **Save**.

4. Click **Save and close** to save the batch and return to the Uncommitted batches tab.

**Note:** For Constituent Update batches, the program updates existing constituents with changes when you commit the batch.

## ➤ Resolve duplicate constituents in Constituent, Membership Dues, and Revenue Update batches

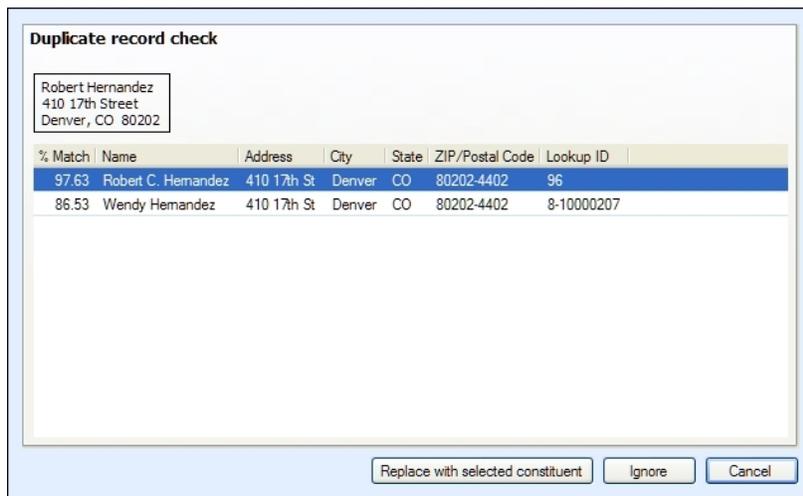
1. On the batch data entry screen, click **Validate** on the toolbar.

**Note:** For revenue batches, **Validate** appears on the Main tab of the toolbar.

**Note:** The duplicate record check screen appears for Constituent, Membership Dues, Revenue, and Revenue Update batches.

When the validation finds a possible duplicate constituent, "This constituent might be a duplicate" appears under the constituent in the grid.

2. Click the message. The Duplicate record check screen appears.



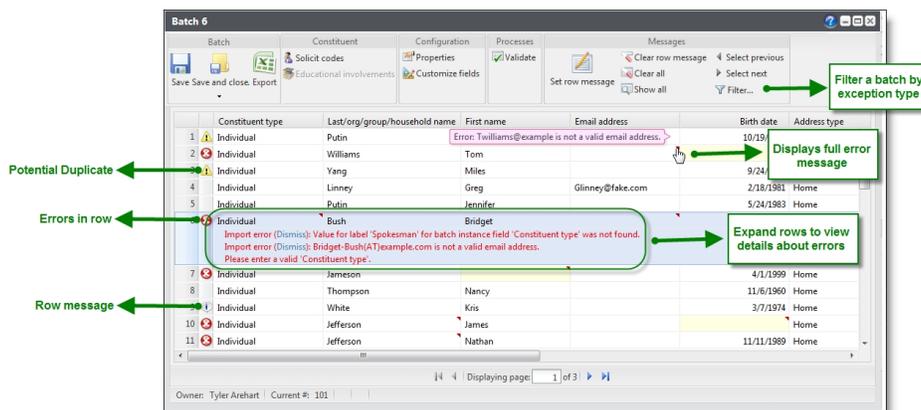
**Warning:** The Possible duplicate matches screen will not appear if you turn off matching via the **Enable/disable matching** configuration task in *Administration*.

The box displays the information entered for a new constituent in the batch. The grid displays information about possible duplicate constituents found in your database. In the grid, the **% Match** column displays the likelihood that the constituent from the database is the constituent entered in the batch.

3. To determine whether the constituent entered in the batch is already in your database, compare the constituent information from the batch with the information about the possible duplicate constituents.
  - To replace the new constituent in the batch with a constituent in the database, select the constituent in the grid and click **Replace with selected constituent**. You return to the batch data entry screen.
  - To keep the new constituent information in the batch, click **Ignore**. You return to the batch data entry screen. The program flags the constituent as a new constituent so it does not include the constituent information if you validate the batch again.
  - To neither replace nor ignore the constituent information, such as if you require additional research before you decide whether the constituent is a duplicate, click **Cancel**. You return to the batch data entry screen.

## Resolve Batch Exceptions

Batch exceptions are records in batches that cannot be validated or committed until you fix an issue. In an uncommitted batch, warning symbols appear next to rows that have issues.



When the row has an error such as a missing required field or a field in the wrong format, a red X appears. When you click the X, the row expands to display information about each of the errors. A red triangle also appears in the top right corner of each field with an error. When you place your cursor over the triangle, the full error message appears. Once you correct an imported field error or missing required field, the grid updates automatically and removes those indicators. Indicators for other types of errors do not clear until you save or validate the batch.

**Tip:** To display all error messages, click **Show all** on the toolbar.

To filter the batches grid by exception type, click **Filter** from the toolbar. After you select a filter, click **Apply**. The batch reloads and shows only records that have the specified error message.

A **Dismiss** option may appear for imported batches when errors are detected for unrequired fields. For example, this option appears when an unrequired field contains an invalid date format or a country not included in the **Countries and states** code table. You must resolve these errors before you can commit the row. You can correct the value in the field or select **Dismiss** to leave the field blank. When you have several of these types of errors, you should review your import settings. When the import settings are correct, the import file probably has poor quality data that the vendor must correct.

**Tip:** To dismiss all errors, click **Clear all** on the toolbar. This clears all fields that caused the error messages.

When the record is a potential duplicate, a yellow caution symbol appears next to the row. When you click the caution symbol, the row expands to provide a link to the duplicate resolution screen. On this screen, you can view information about possible duplicates and decide whether to update the existing record or add a new record. For more information about how to resolve duplicates in a batch, see [Resolve Duplicate Constituents in a Batch on page 97](#)

The grid also displays a white symbol with an "i" for any row that has a message set. When you click on this symbol, the row expands to display the message. These are often reminders. For example, message may recommend you check the spelling of a name. You cannot commit the row until you clear the row message.

You can resolve errors at multiple points in the batch process. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. Batch validation catches any additional errors not already found. When you import batches and choose to validate but not commit, when you open the uncommitted batch, you can resolve errors and then commit. When you commit batches, you can select to create an exception batch which contains all records that do not commit to the database. You can open the exception

batch, resolve any additional errors and then commit again. For more information about working with exception batches, see [Batch Exception Chain on page 103](#).

## Batch Exception Chain

When you commit a batch, you can select to create an exception batch, which contains all records that do not commit to the database. From this exception batch, you can correct any errors that prevent the committal of records. After you correct the data, you can then commit the exception batch to automatically create or update the records in the database.

**Note:** During the commit process, when you select to create an exception batch for a Membership Dues Batch, Revenue Update Batch, or an Enhanced Revenue Batch, any unprocessed credit card transactions are added to the exception batch. After you ensure that each credit card transaction is correct, you must run a credit card processing process for the exception batch. You can then commit the exception batch to automatically create or update the records in the database. For more information about processing credit cards from the Credit card processing page in *Revenue*, see the *Revenue Guide*.

When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database. On the Batch Exception Chain page, you can view all batches related to a selected batch. To access the Batch Exception Chain page for a batch, select the batch on the Batch Entry page and click the batch number.

The Batch Exception Chain page displays all batches related to the batch in order of their committal dates, with the original batch listed first. In the grid, the batch from which you access the exception chain appears in bold. For each batch, you can view its number, description, owner, category, and committal status.

From the grid, you can access the batch data entry screen to open a committed batch, and view its records. You can also view a control report or an exception report for a committed batch. The batch control report lists the records in the batch that were committed to the database and provides information about each record. The batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. [Batch Exception Report on page 150](#)

For an uncommitted batch, you can access the batch data entry screen to correct data if necessary and ensure its committal. You can also view a validation report for an uncommitted revenue batch. The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. In addition, the report includes other data entered for the transactions in the batch.

# Commit Multiple Batches

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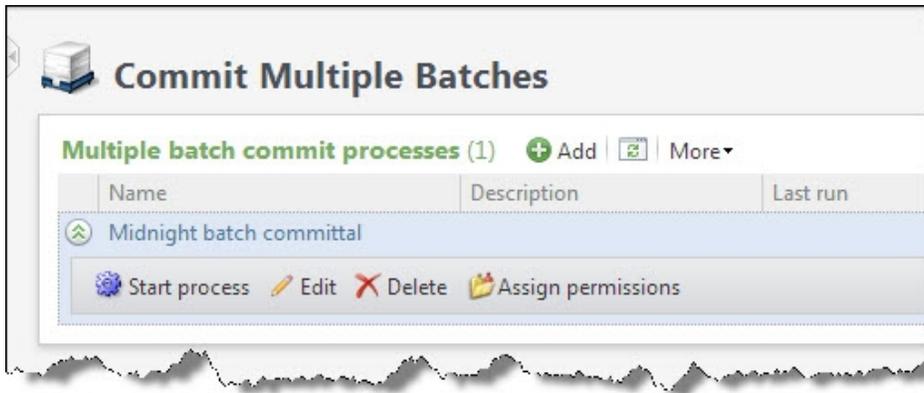
In **Batch entry**, you can use a batch to enter and update information on multiple records at one once. To add or update the records in your database, you must commit (apply and save) the batch to your database.

On the Commit Multiple Batches page, you can create and manage processes to automatically commit multiple batches at once. Each multiple batch commit process you create has a parameters page. On the parameters page, you can view information about the most recent and previous instances of the process and create a job schedule to automatically run the process. For example, you may want to commit all available batches at a set time each day.

## Commit Multiple Batches Page

On the Commit Multiple Batches page, you can view and manage multiple batch commit processes from one central location. You can add, edit, and start your multiple batch commit processes. Depending on your security rights and system role, you can also delete processes from the Commit

Multiple Batches page. To access the Commit Multiple Batches page, from the Batch page in *Administration*, click **Commit multiple batches**.



The **Multiple batch commit processes** grid lists the processes in the database and displays the name and description of each process. You enter this information when you add the multiple batch commit process to the database. The grid also displays the date and time each process last ran.

Depending on your security rights and system role, using the action bar, you can manage the multiple batch commit processes in your database.

To update the information that appears in the grid, click **Refresh** on the action bar.

## Add a Multiple Batch Commit Process

On the Commit Multiple Batches page, you can create a process to automatically commit multiple batches at once.

**Note:** On the Batch Entry page, you can commit individual batches. For information about how to commit batches individually, see [Commit a Batch on page 61](#).

### ➤ Add a multiple batch commit process

1. On the Commit Multiple Batches page, click **Add** on the action bar of the **Multiple batch commit processes** grid. The Add a multiple batch commit process screen appears.

2. In the **Name** field, enter a name to identify the multiple batch commit process.  
The name of each multiple batch commit process must be unique.
3. In the **Description** field, enter a detailed description to help identify the multiple batch commit process.  
For example, you can describe the batches that the process commits, such as "All committable revenue batches."

**Tip:** You can enter up to 255 characters in the name and description fields.

4. Under **Commit criteria**, select the batches to include in the multiple batch commit process. The multiple batch commit process includes all batches in the selection that can be committed.
  - To include all batches in your database that can be committed, select **All committable batches**.
  - To include only a selection of batches, choose **Selected batches**. The **Selection** field is enabled. From this field, use the Selection Search screen to find or create the selection of batches to include in the multiple batch commit process.

**Note:** When you run a multiple batch commit process, it can commit only those batches you have rights to administer, as specified by the security on the batch template. When your **Criteria** selection includes batches you cannot commit, those batches generate exceptions when you run the process.

**Tip:** If the selection is created from an ad-hoc query or a smart query instance, click the pencil to edit the query used to generate the selection.

5. Under **Commit options**, specify how to handle the committal of the batches included in the process.
  - To create batches of all records in each batch that do not commit to the database, select **Create exception batches**.

- To create selections of all the records created in the database when you commit the batches, select **Create output selections**.

**Note:** We strongly recommend you mark **Create output selections**. The output selection can be very useful. For example, you can use this selection when you create acknowledgment letters or other mailings for the constituents for whom you added payments in the batch.

- To generate a control report for each batch the process commits to the database, select **Create control reports**. The control reports describe each committed batch and provide information about the records included in each batch.
  - To delete each batch after you commit them to the database, select **Delete batches after commit**.
6. Click **Save**. You return to the Commit Multiple Batches page. In the **Multiple batch commit processes** grid, the new process appears.

**Tip:** When you run the multiple batch commit process, you can edit any of the fields on the Add a multiple batch commit process screen as necessary.

## View a Multiple Batch Commit Process Parameters Page

When you create a multiple batch commit process, the program creates a parameters page of the process. The parameters page includes all criteria used to create the multiple batch commit process, information about the most recent instance of the process, historical information about the process, and the schedule of the job outputs.

On the Commit Multiple Batches page, the **Multiple batch commit processes** grid lists the multiple batch commit processes available in the database.

To view the parameters page of a multiple batch commit process, select the name of the process in the grid. For information about the items on a multiple batch commit process parameters page, see [Tabs of a Process Status Page on page 109](#).

## Start a Multiple Batch Commit Process

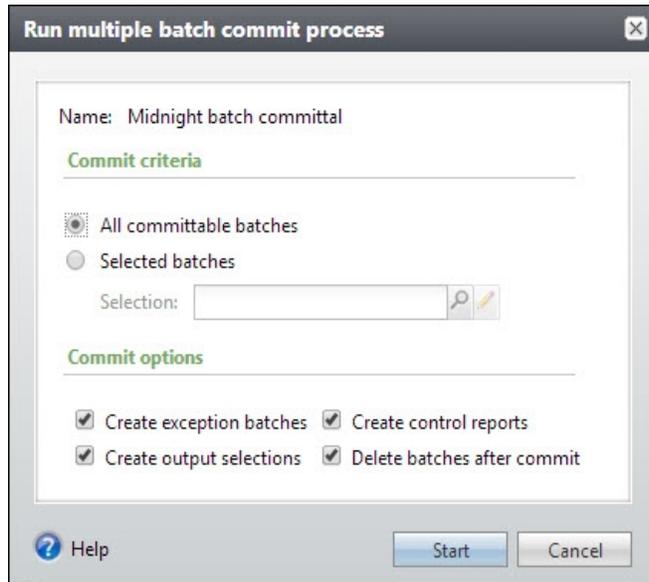
When you start and run a multiple batch commit process, the program commits the selected committable batches that you have rights to commit. When the process commits a batch, the program uses the data in the batch to automatically create or update records in the database.

On the Committed Batches tab of the Batch Entry page, you can view the batches the process commits.

### ➤ Start a multiple batch commit process

1. To start a multiple batch commit process, click **Commit multiple batches** in *Administration*. The Commit Multiple Batches page appears.
2. In the **Multiple batch commit processes** grid, click the double arrows next to a process to expand its row. On the action bar, click **Start process**. The Run multiple batch commit process screen appears.

**Note:** You can also start a multiple batch commit process from its parameters page. From the explorer bar, click **Start process** under **Tasks**. The Run multiple batch commit process screen appears. For information about the parameters page, see [Tabs of a Process Status Page on page 109](#).



3. Under **Commit criteria** and **Commit options**, review the batches included in the process as well as the committal options. You select these options when you add the process to the database. Update this information as necessary.
4. Click **Start**. The program runs the process. When the process is complete, its parameters page appears.

For information about the items on the process parameters page, see [Tabs of a Process Status Page on page 109](#).

## Assign Permissions for a Multiple Batch Commit Process

After you add a multiple batch commit process, you can assign permissions to the roles that can use the process. When you assign permissions for the process, you can select to allow all system roles to use the process or only select roles.

### ➤ Assign permissions for a multiple batch commit process

1. To assign permissions to a multiple batch commit process, click **Commit multiple batches** in *Administration*. The Commit Multiple Batches page appears.
2. In the **Multiple batch commit processes** grid, click the double arrows next to a process to expand its row. On the action bar, click **Assign permissions**. The Assign permissions screen appears.
3. Select whether all system roles or only selected roles may access the process.  
If you select **Selected roles**, select the permissions for the roles in the **System roles** box.

- To grant a role access, select it in the box and click **Grant** on the action bar.
  - To deny a role access, select it in the box and click **Deny** on the action bar.
  - To remove an existing permission assignment from a role, select it in the box and click **Clear** on the action bar.
4. Click **Save**. You return to the Commit Multiple Batches page.

## Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

### Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

### History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of "Did not finish." To filter the records that appear in the grid, click **Filters**. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh**.

## Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and click **Delete**.

### ➤ Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

**Note:** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

## Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

## Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

**Note:** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

## > Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.

**Create job**

**Details**

Job name:

Schedule type:

Enabled

**One-time occurrence**

Date:  Time:

**Frequency**

Occurs every:  day(s)

**Daily frequency**

Occurs once at:

Occurs every:   Starting at:  Ending at:

**Duration**

Starting at:  End date:   No end date

Help Save Cancel

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
  - a. For a process that runs once, select the date and time to run it.
  - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

time or at regular intervals on the days when it runs.

- c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

## Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

### > Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen on page 145](#).
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

## Create Job Screen

### Screen Item Description

Screen Item	Description
<b>Job name</b>	Enter a name for the job schedule.
<b>Schedule type</b>	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
<b>Enabled</b>	By default, the scheduled process is active. To suspend the process, clear this checkbox.
<b>One-time occurrence</b>	For a process that runs once, select the date and time to run it.
<b>Frequency</b>	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the <b>Occurs every</b> field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.

### Screen Item Description

<b>Daily frequency</b>	<p>For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.</p> <p>To run a process once, select <b>Occurs once at</b> and enter the start time.</p> <p>To run a process at intervals, select <b>Occurs every</b> and enter the time between instances, as well as a start time and end time.</p>
<b>Start date</b>	<p>For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select <b>No end date</b>.</p>

## Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

### > Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

## Start Process

This task allows you to start the selected business process from the process page.

## Edit Process

This task allows you to edit the selected business process from the process page.

## Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

## Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

## Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

## Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

## Generate Windows Scripting File

A Windows Scripting File (\*.wsf) is an executable script file format for Windows that can incorporate VBScript (\*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

### ➤ Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

**Note:** The download process varies according to the browser you use.

# Import



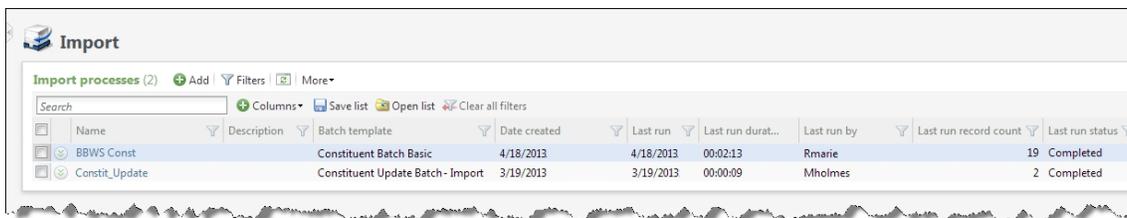
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With *Import*, you can easily move data from one program to another. *Import* is particularly useful when your organization maintains multiple databases or when you frequently move information in and out of the database. In *Import*, you can create a batch to enter new records in the database or update existing records.

For example, using a spreadsheet from an outside application such as Microsoft *Excel*, you gather a large amount of information about potential donors including names, addresses, and other related data. It is logical to bring this data into your database, in bulk, using a batch. To do this, you add an import process, select a batch template, and specify and map fields from your import file to the fields that will ultimately display in the batch. The fields necessary to import or update information depend on the selected batch template.

## Import Page

On the Import page, you manage the import processes in your database. To access the Import page, from *Administration*, click **Import**. The Import page appears.



The screenshot shows the 'Import' page interface. At the top, there is a search bar and several action buttons: 'Add', 'Filters', and 'More'. Below this is a table titled 'Import processes (2)'. The table has columns for Name, Description, Batch template, Date created, Last run, Last run durat..., Last run by, Last run record count, and Last run status. Two rows are visible in the table.

Name	Description	Batch template	Date created	Last run	Last run durat...	Last run by	Last run record count	Last run status
BBWS Const		Constituent Batch Basic	4/18/2013	4/18/2013	00:02:13	Rmarie	19	Completed
Constit_Update		Constituent Update Batch - Import	3/19/2013	3/19/2013	00:00:09	Mholmes	2	Completed

**Note:** Before you can create import processes, the system administrator must first configure the import source file locations used for import processes. For information about how to configure the import sources, see [Configure Import Sources on page 116](#).

The **Import processes** grid displays information about the import processes in the database and the import file used for each process. This information includes the name, associated batch template, and information about the last time the process ran. Depending on your security rights and system role, you can perform various tasks to manage the import processes in the database from the action bar.

## Configure Import Sources

Before you can create import processes, the system administrator must configure the import source locations where import files are stored on Secured FTP servers or a shared network directory. Each source includes a URL or file path and the credentials to access the location. When you create a new import process, you select the import source file location for that process.

**Warning:** When the path for a network directory import source is configured incorrectly, the SFTP server import may fail. Since SFTP imports are dependent upon network setup, a failure may occur even when the SFTP server import is configured correctly.

➤ **After an import process uses an SFTP import source, how does the program archive it?**

After an import process uses an SFTP import source, the program archives it under the directory path that was defined for the network directory import source. This ensures the process does not import the file again.

The folder name is generated from the import source name and ID (name\_ID). If a sub-directory is specified on the import, a folder with the same sub-directory name is created under the importname\_importID folder and the file is copied to this location. Note that the program does not remove the file from the initial directory.

### ➤ Add an SFTP server import source

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import sources**. The Import Sources page appears.
3. Click **Add, SFTP server**. The Add SFTP server import source screen appears.



4. In the **Name** field, enter a name to identify the import source.
5. In the **URL** field, enter the URL for the SFTP server.
6. If your SFTP server requires a port number, enter it in the **Port** field.
7. Under **Login credentials**, enter the user name and password for the SFTP server.
8. To make sure the connection works properly, click **Test connection**.
9. Click **Save**. You return to the Import Sources page.

### ➤ Configure a network directory import source

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import sources**. The Import Sources page appears.
3. Click **Add, Network directory**. The Add network directory import source screen appears.

**Warning:** You can configure only one network directory source. Once added, you cannot delete it.

4. In the **Name** field, enter a name to identify the import source.
5. In the **Directory path** field, enter the location accessible from the web server where you store import files. For example, enter a location on the web server such as "E:\importfiles," or enter a Uniform Naming Convention (UNC) path to a shared folder such as "\\servername\importfiles."
6. Under **Login credentials**, select one of these options:
  - **Use default login** — Use the application user's network login.
  - **Use different login** — When the directory path maps to a secured location, enter the user name and password required for access.

**Note:** For security reasons, the program saves the password entered in the **Password** field in an encrypted field in the database. When you edit the import source, the password is masked.

7. Click **Save**. You return to the Import Sources page.

## Configure Import File Templates

An import file mapping template specifies how to map fields from an import file to a batch template. The template allows you to map fields once rather than manually mapping them each time you create an import process.

You can create templates for delimited and fixed-width import files. For delimited files, this is a one-step process where you map fields from a sample import file to batch template fields. For fixed-width files, mapping instructions are defined by an external layout file provided by your vendor. This file includes (at a minimum) a column of field names and three columns of numbers that represent the start and end positions and character widths for each field. You map the fixed-width layout file in two steps. First, you map the field name and start and end positions to their program values. Second, you map the import fields to the batch template fields. As you map import file fields, the program automatically calculates start positions, end positions, and field widths based on instructions from the layout file.

After you create an import file mapping template, you can use it with any import process associated with the same batch template. You may need to create custom batch templates to accommodate your vendor's import file format. For example, when an import file includes columns for batch or file summary information, you must include those columns in your batch template as well.

**Tip:** On the Map fields tab of an Add or Edit import process screen, you can select the import file template to use.

### ➤ Add or edit a delimited import file template

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Import file templates**. The Import File Templates page appears.
3. Select **Add, Delimited template**. The Add a delimited file mapping template screen appears.

**Add a delimited file mapping template**

Name:

Batch template:

**Sample file**

File location:  From server file  From local file  First row is header

Import file:

File delimiter:

Detail record row prefix characters:

Batch template column	Import file column
Constituent	
Constituent type	Constituent type
Lookup ID	
Last/Org/Group/Household name	Last/org/group/household name
First name	First name
Addresses	Collection field...
Phones	Collection field...
Sequence	

3 of 14 batch fields have been mapped.

Batch summary row prefix characters

File summary row prefix characters

4. In the **Name** field, enter a name to identify the file mapping template.

5. In the **Batch template** field, select the batch template to associate with this mapping template.
6. Under **Sample file**, in the **File location** field, select the location of the import file to base the mapping template on.
  - **From server file:** Select this option to choose the file from the network directory import source. In the **Import file** field, select the sample file.
  - **From local file:** Select this option to choose the file from your workstation. In the **Import file** field, click the green arrow to browse to the import file.
7. To specify the first row of the import file as the header row, select **First row is header**.
8. In the **File delimiter** field, select the character used to separate values in the file. You can use any delimiter except spaces and tabs.
9. When the import file includes prefix characters to identify rows in the import file that contain detail records, select **Detail record row prefix characters** and enter the characters used, such as "DR" for "detail row." When the file uses prefixes, they always appear in the first column.
10. The **Batch template column** of the grid lists the columns from the selected batch template. To map the columns, in the **Import file column**, select the column from the selected import file that matches the batch template column.
11. To automatically match columns in the import file to columns in the batch template, click **Auto-map**. The program attempts to match the columns of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.
12. When, in the **Import file column**, **Collection field** appears for a field, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.
  - a. Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.
  - b. The **Collection field column** of the grid displays the fields required for each imported entry. In the **Import file column**, select the data from the selected import file that matches the collection field. Click **OK**. You return to the Add a delimited file mapping template screen.
13. When the import file includes rows with batch summary data, select **Batch summary row prefix characters** and enter the prefix characters used, such as "BS."
14. When the import file includes rows with file summary information, select **File summary row prefix characters** and enter the prefix characters used, such as "FS."
15. Click **Save**. You return to the Import File Templates page.

### ➤ Add or edit a fixed-width import file template

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Import file templates**. The Import File Templates page appears.
3. Select **Add, Fixed-width template**. The Add a fixed-width file mapping template screen appears on the Step 1: Read file columns form.

**Add a fixed-width file mapping template**

Step 1: Read file columns    Step 2: Map file to batch columns

Name:

Batch template:

**Layout file**

File location:  From server file    From local file    First row is header

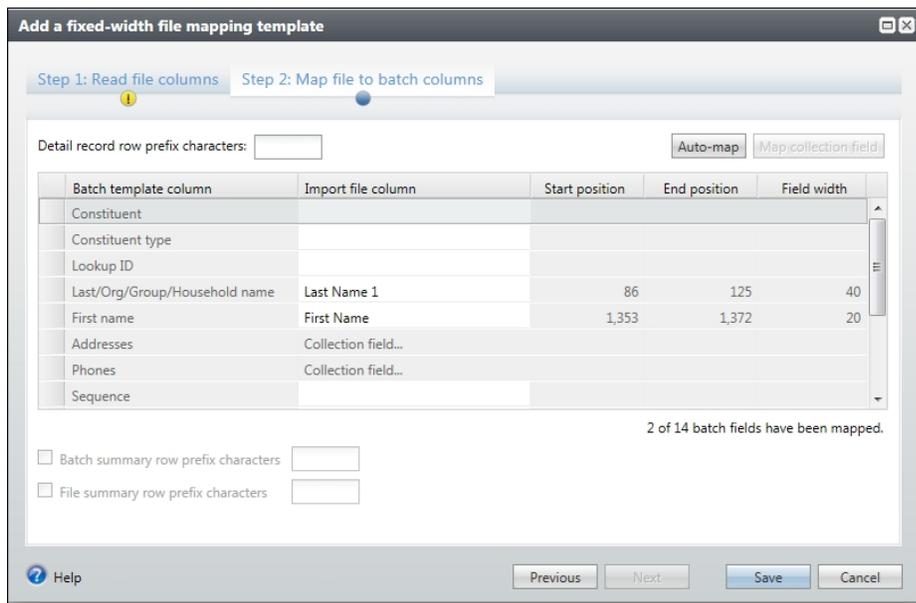
Layout file:

**Layout file column mapping**

Layout value	Layout file column
Field name	Field Name
Start position	Start
End position	End

4. In the **Name** field, enter a name to identify the file mapping template.
5. In the **Batch template** field, select the batch template to associate with this mapping template.
6. Under **Layout file**, in the **File location** field, select the location of the layout file to base the mapping template on. The layout file specifies the start and end position and field length for each field in the import file.
  - **From server file:** Select this option to choose a file from the network directory import source. In the **Layout file** field, select the layout file from the drop-down.
  - **From local file:** Select this option to choose a file from your workstation. Click the green arrow to browse to the layout file.
7. To specify the first row of the import file as the header row, select **First row is header**.
8. In the **Layout file column mapping** grid, select the column from the layout file that maps to the **Field name**, **Start position**, or **End position** layout value in the program. You must map all three of these values.
9. To automatically match columns in the layout file to program layout values, click **Auto-map**. The program attempts to match the program layout values to similarly named columns in the selected layout file. You can adjust these as necessary.
10. Click **Next**. The Step 2: Map file to batch columns form appears. On this form, you map batch template columns with columns in the import file.



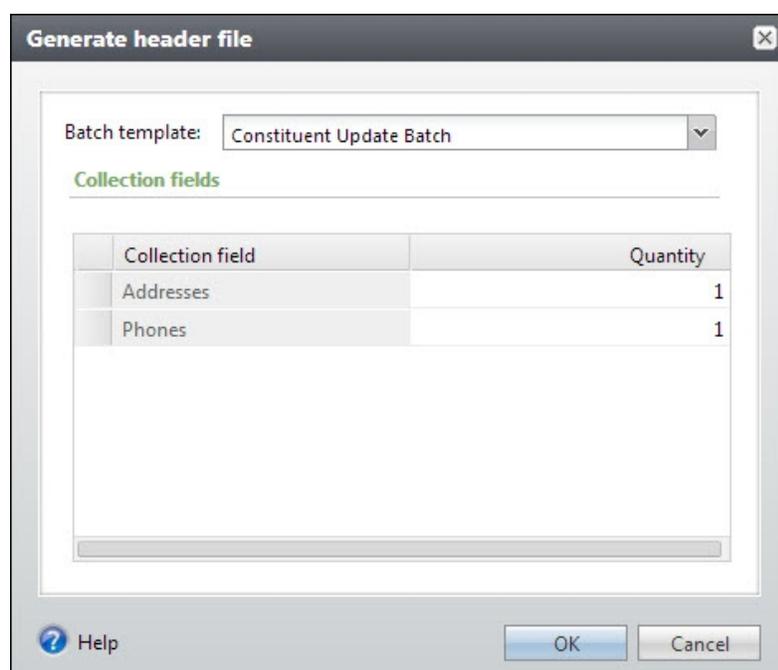
11. When the import file includes prefix characters to identify rows in the import file that contain detail records, select **Detail record row prefix characters** and enter the characters used, such as "DR" for "Detail Row." When the file uses prefixes, they always appear in the first column.
12. The **Batch template column** of the grid lists the columns from the selected batch template. In the **Import file column**, select the column from the selected import file that matches the batch template column. As you select import file columns, the **Start position**, **End position**, and **Field width** values update automatically based on specifications from the selected layout file.  
 To automatically match columns in the import file to fields in the batch template, click **Auto-map**. The program attempts to match the columns of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.
13. When **Collection field** appears in the **Import file column**, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.
  - Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.
  - The **Collection field column** of the grid displays the fields required for each imported entry. In the **Import file column**, select the data from the selected import file that matches the collection field. Click **OK** to return to the Add a fixed-width file mapping template screen.
14. When the import file includes rows with batch summary data, select **Batch summary row prefix characters** and enter the prefix characters used to identify the rows, such as "BS."
15. When the import file includes rows with file summary information, select **File summary row prefix characters** and enter the prefix characters used to identify the rows, such as "FS."
16. To save the mapping template and return to the Import File Templates page, click **Save**.

## Generate Import Header File

To ease the mapping of fields to their corresponding header values in an import field, you can generate a comma-separated value (\*.csv) file that automatically includes the header values for a batch template. After you enter data into the rows of this header file, you can then add an import process for the file. When you click **Auto-map** on the Add import process screen, the program automatically matches the fields of the batch template to their corresponding header values in the import file.

### ➤ Generate a header file for import

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Tasks**, click **Generate import header file**. The Generate header file screen appears.



3. In the **Batch template** field, select the batch template with the fields to include in the header file.
4. Under **Collection field**, the grid displays the collection fields included in the selected batch template. Collection fields can support multiple entries. In the **Quantity** column, enter the number of entries to import for each collection field. For example, to import three phone numbers for a constituent, enter "3" for the **Phones** collection field.
5. Click **OK**. The program automatically generates a \*.csv file that contains a header row that displays the name for each field included in the batch template. A message appears to ask whether to open the header file.
6. The file opens in a spreadsheet program such as Microsoft *Excel*. Enter import data into the file as necessary and save the file to your preferred location.

## Generate Encryption Keys

To protect sensitive credit card information, when you use a batch template that includes a field for credit card numbers to import data, the program automatically encrypts the import file when it saves the file to the server. To ensure the security of this sensitive data, you must periodically generate a new encryption key. We recommend your organization grant only a few users the rights to generate encryption keys.

**Warning:** After you generate an encryption key, you can no longer read any previously encrypted import files. Before you generate a new key, run the import process for any pending import files to avoid data loss to unreadable import files. For information about how to run the import process, see [Start an Import Process on page 141](#).

To generate a new key from the Import page, click **Generate encryption key** under **Tasks**. When a message appears to ask whether to update the encryption key, click **Yes**. You return to the Import page. The program now uses the new encryption key to secure new import files that include credit card number information.

After you run an import process to create a batch from an encrypted import file, the program automatically deletes the encrypted import file from the server.

## Manage Import Processes

From the **Import processes** grid of the Import page, you can add, edit, and delete the import processes in your database. You can also start a process and assign permissions. To access the Import page, from *Administration*, click **Import**.

## Add an Import Process

You can create an import process to generate a batch for adding or updating information from a file created in another application. For example, during an event, you may not have access to the program. Instead, you enter data in a word processing or spreadsheet program such as Microsoft *Excel*. After you save your spreadsheet as a delimited or fixed-width file in the outside application, you can import the information into your database. You can add an import process from the Import page of *Administration* or from within *Batch Entry*.

**Tip:** You can also create recurring import processes for imports used multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location.

**Note:** Before you can create import processes, the system administrator must configure at least one import source for import processes. For information about import sources, see [Configure Import Sources on page 116](#).

To add an import process, select **Add** on the action bar of the Import page. The Select a batch template screen appears where you can select a batch template to use as the basis for your new import process.

**Note:** When a batch template you want to use does not display, consult your batch processing manager. For example, the batch template may not display because it is not configured to enable batch processing with imports.

After you select a batch template, click **OK**.

The Add import process screen displays and includes a series of tabs designed to walk you through the process of adding an import process.

- On the **Configure import file** tab, enter the import process name and description, select a batch owner, and specify the import type and source.
- On the **Map fields** tab, you map import fields to batch template fields manually or select to use an import file mapping template.
- On the **Set Options** tab, specify options for import workflow, constituent matching, date formats, fields, and constituent updates.

From any of the tabs, use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen.

**Tip:** A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.

## ➤ Configure import file

1. From the Add import process screen, click **Configure import file**. The Configure import file tab appears. For more information about how to access the Add import process screen, see [Add an Import Process on page 124](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.

The screenshot shows the 'Add import process' dialog box with the 'Configure import file' tab selected. The dialog has three tabs: 'Configure import file' (active), 'Map fields', and 'Set options'. The 'Configure import file' tab contains the following fields and options:

- Name:** A text input field with a yellow warning icon.
- Description:** A text input field.
- Site:** A dropdown menu set to 'All Sites' with a search icon.
- Batch owner:** A dropdown menu.
- Batch template:** A dropdown menu set to 'Constituent Update Batch'.
- How often will you use this import and where is the file stored?:** A section header.
- Import type:** Radio buttons for 'Once' (selected), 'Recurring', and a checked 'First row is header' checkbox.
- Import source:** A dropdown menu set to 'Local file' with a folder icon.
- File:** A text input field with '<File not specified>' and a green folder icon.

At the bottom of the dialog, there is a 'Help' icon, and buttons for 'Previous', 'Next', 'Save', and 'Cancel'.

2. In the **Name** field, enter a name to help identify the import process. The name of each import process must be unique.

**Tip:** You can enter up to 100 characters in this field.

3. In the **Description** field, enter a description to identify the import process in your database.

**Tip:** You can enter up to 255 characters in this field.

4. In the **Batch owner** field, select the batch processor to receive the batch created by the import process.
5. Under **Import file**, select the import's occurrence:
  - **Once** — select this option to use the import process only once.

- **Recurring** — select this option to use the import process multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location.
6. To specify the first row of the import file as the header row, select **First row is header**.
  7. In the **Import source** field, select an import source location where import files are stored on SFTP servers or shared network directories. For more information about import sources, see [Configure Import Sources on page 116](#).
    - **Local file** — When you select **Once** as the import type, you can select a file from your current workstation.
    - **Network directory** — When you select **Once** as the import type, you can select the network directory import source and enter a file pattern in the **File** field.
    - **SFTP server** — When you select **Once** or **Recurring** as the import type, you can select an SFTP server import source. When the URL entered on the SFTP import source does not already include a subdirectory, you can enter one in the **Subdirectory** field.
  8. When you select an SFTP server or network directory import source, you can enter a pattern for file names using wildcards (\*,?,[],#) in the **File** field. This allows the import process to pull files with similar names from the same location. For example, if your organization downloads a file from an SFTP site each night and the file is always named Import plus a version number (i.e., Import123.csv), enter the file name as "Import\*.csv." The import process will grab all new files in the folder that fits the pattern, such as Import4 or Import79.

**Warning:** To ensure foreign characters appear correctly in an imported batch, the import file must be encoded as UTF-8.

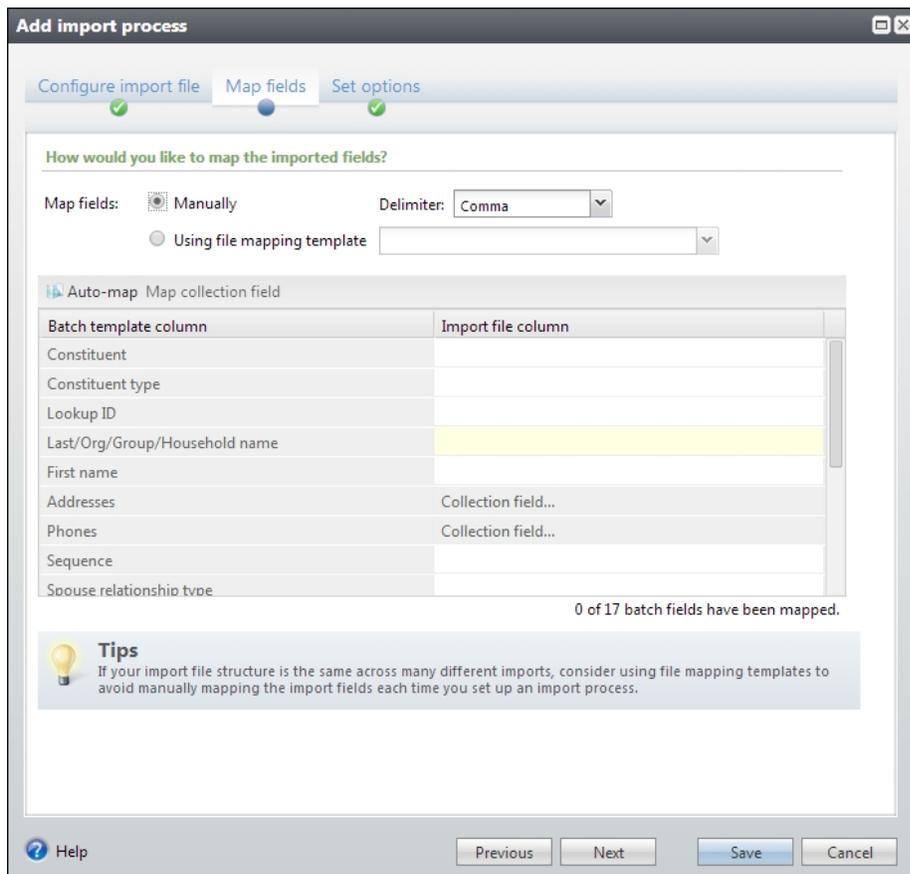
**Tip:** After an import process uses an SFTP import source, the program archives it under the directory path that was defined for the network directory import source. This ensures the process does not import the file again.

9. Click **Next** to move to the Map fields tab.

## ➤ Map fields

1. From the Add import process screen, click **Map fields**. The Map fields tab appears. For more information about how to access the Add import process screen, see [Add an Import Process on page 124](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.



2. Under **Field mapping**, select whether to map import fields to batch template fields manually or to use an import file mapping template. When you select **Use file mapping template**, select the mapping template. For more information about mapping templates, see [Configure Import File Templates on page 118](#).

When you select **Manually**, the **Batch template column** section of the grid lists the fields from the selected batch template. In the **Import file column** section, select the heading from the selected import file that matches the batch template field. You can also select the character used to separate values in the file.

To automatically match fields in the import file to fields in the batch template, click **Auto map**. The program attempts to match the fields of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.

**Note:** For a volunteer timesheet batch, we recommend you use Lookup ID for the **Volunteer** field.

**Note:** For a membership batch, we recommend you use Lookup ID for the **Name** field.

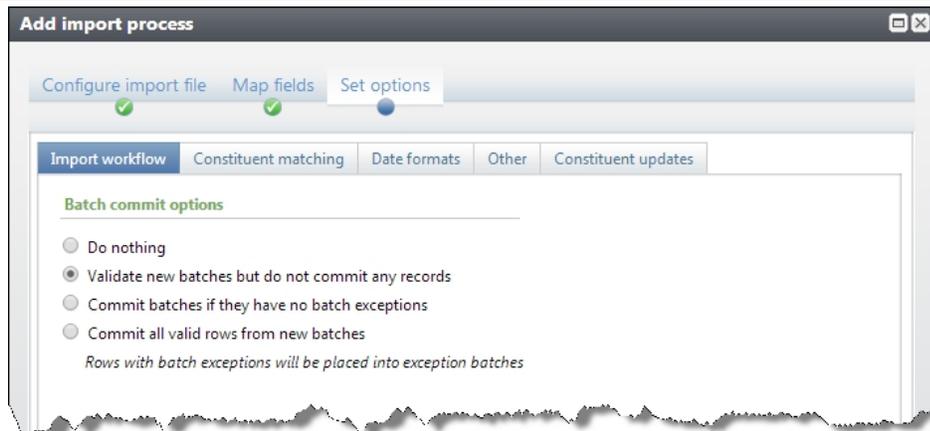
3. In the **Import file column** section, when **Collection field** appears for a field, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.
  - a. Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.

- b. The **Collection field column** section of the grid displays the fields required for each imported entry. In the **Import file column** section, select the data from the selected import file that matches the collection field.
  - c. Click **OK**. You return to the Add import process screen.
4. Click **Next** to move to the Set options tab.

## > Set options

1. From the Add import process screen, click **Set options**. The Set options tab appears. For more information about how to access the Add import process screen, see [Add an Import Process on page 124](#).

**Tip:** Use **Previous** and **Next** to move between the tabs, or click the links at the top of the screen. A blue circle indicates the tab you are currently using. When required information is missing, a yellow warning appears.



2. On the Import workflow tab, select which action to perform after batches are imported.
  - **Do nothing:** Select this option to manually validate and commit the batch at a later time. Use this option when another user must review the batch before you commit it, or when you need to skip the extra validation process to ensure the batch commits on time.
  - **Validate new batches but do not commit any records:** Select this option to validate the batch and then later commit it manually. Use this option when another user must review records before you commit the batch and time allows for the extra validation process. For example, you can schedule the validation to run overnight and then manually review and commit the batch in the morning.
  - **Commit batches if they have no batch exceptions:** Select this option to validate the batch and then commit it automatically if there are no batch exceptions. Use this option when you need to enter records quickly, but you also want to manually review any errors.

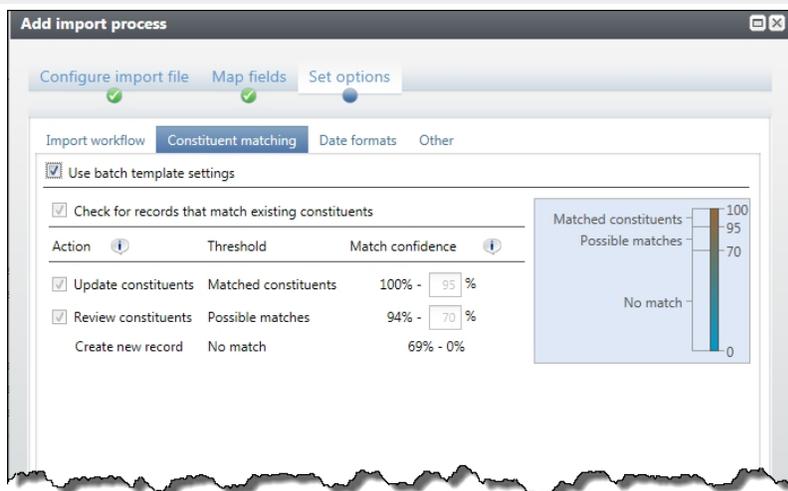
**Note:** You may receive exceptions during committal for a batch that does not create exceptions during validation. For example, in a revenue batch, if a payment row is applied to a commitment and then another payment row is applied to the same commitment, an exception occurs because the commitment was already paid by the first row. This exception does not occur during the initial validation because validation temporarily commits a row in order to check for errors, then rolls back the committal before it processes the next row .

- **Commit all valid rows from new batches:** Select this option to validate the batch and then automatically commit each valid row. If a row does not validate, the program adds it to an exception batch that you can review later. Use this option when you need to add data as quickly as possible.

3. Select the Constituent matching tab.

**Note:** Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

**Note:** The Constituent matching tab is available only for imports that use Constituent Update, Membership Dues, and Enhanced Revenue batch templates. The settings default from the Constituent Matching Settings page in *Administration* or from the associated batch template if that template uses different thresholds. For more information about constituent matching settings, see the *Constituent Duplicates and Merge Tasks Guide*.



4. You can use matching settings to identify records in the batch that may already exist as constituents in your database. When you select **Use batch template settings**, the percentages default from the batch template selected for the import. To change the default settings, clear **Use batch template settings** and select **Check for records that match existing constituents**. The thresholds defined on this tab apply to all batches produced from this import process.

- Edit the percentage range for the **Matched constituents** threshold. Imported records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import.

**Note:** For Constituent Update batches, the program may update the existing constituent with information from the incoming constituent according to the constituent update rules. For more information about update rules, see [Constituent Updates on page 135](#).

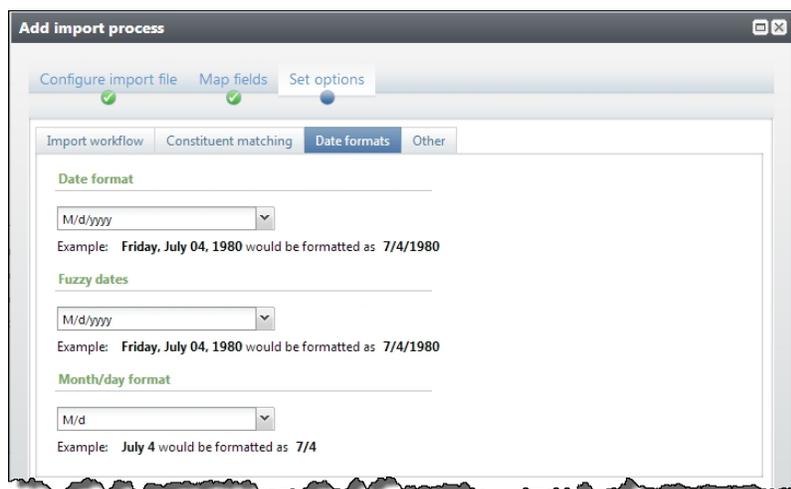
- Edit the percentage range for the **Possible matches** threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.

For more information about how to compare records on the duplicate resolution screen, see [Resolve Duplicate Constituents in a Batch on page 97](#).

- c. The percentage range for the **No match** threshold is based on your settings for the upper thresholds. Imported records with match scores in this range probably do not match an existing record.

The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For enhanced revenue imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.

5. Select the Date formats tab.

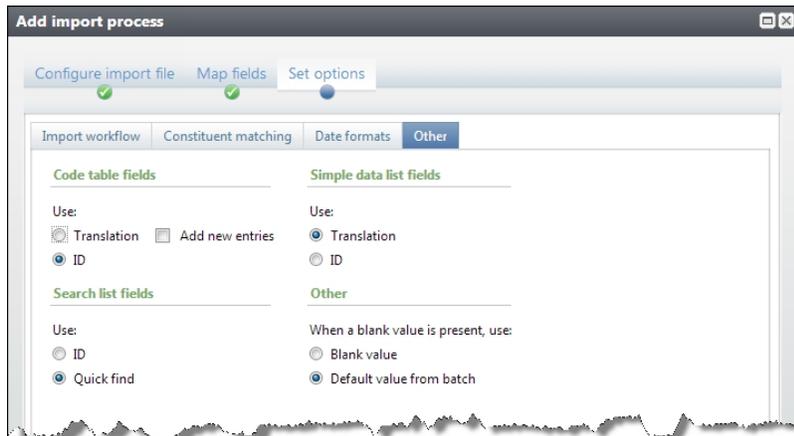


6. Under **Date format**, **Fuzzy dates**, and **Month/day format**, specify how dates appear in the imported data. Select the format from the drop-down list, or enter date specifiers to specify the format. The **Example** field displays how a date appears in the selected format.

Date Specifier	Description	Example
d	Numerical day of the month, single-digit	4
dd	Numerical day of the month, double-digit	04
ddd	Abbreviated day name	Fri
dddd	Full day name	Friday
M	Numerical month, single-digit	7
MM	Numerical month, double-digit	07
MMM	Abbreviated month name	Jul
MMMM	Full month name	July
yy	Year, two-digits	80
yyyy	Year, four-digits	1980

**Note:** A “fuzzy date” is an incomplete date. The data in the import file may include incomplete dates. For example, a fuzzy birth date of a constituent may include the month and year, but not the day.

7. Select the Other tab.



8. Under **Code table fields**, select whether the import file contains the translation or ID value of data to import from code tables. To add new entries to a code table when entries do not exist for the fields in the import file, mark **Add new entries**. If you are unsure which to select, consult your System Administrator.
9. Under **Simple data list fields**, select whether the import file contains the translation or ID value of data to import from simple data lists. If you are unsure which to select, consult your System Administrator.
10. Under **Search list fields**, select whether the import file contains the ID or Quick find value of data to import from search lists. If you are unsure which to select, consult your System Administrator.

**Note:** For an import process based on the constituent update batch template, if you select to search list fields based on **Quick find**, the **Constituent** column within your import file must contain the constituent lookup ID.

11. Under **Other**, select how to handle a blank value in the imported data. You can select to import the blank value or use the default value from the selected batch template.
12. Click **Save**. You return to the Import page or Batch Entry page.

## Import Workflow

The table below explains the items on the Import workflow tab under **Set options**. Use these options to specify which action to perform after batches are imported.

Screen Item	Description
<b>Do nothing</b>	Select this option to manually validate and commit the batch at a later time. Use this option when records must be reviewed by another user before the batch is committed, or when you need to skip the extra validation process to ensure the batch is committed on time.
<b>Validate new batches but do not commit any records</b>	Select this option to validate the batch and then later commit the batch manually. Use this option when records must be reviewed before the batch is committed and you have time for the extra validation process. For example, you could schedule the validation to run overnight and then manually review and commit the batch in the morning.
<b>Commit batches if they have no batch exceptions</b>	Select this option to validate the batch and then commit it automatically if there are no batch exceptions. Use this option when you need to enter records quickly but you also want to manually review if there are errors in the file. <b>Note:</b> You may receive exceptions during committal for a batch that does not create exceptions during validation.  For example, in a revenue batch, if a payment row is applied to a commitment and then another payment row is applied to the same commitment, an exception occurs because the commitment was already paid by the first row. This exception does not occur during the initial validation because validation temporarily commits a row in order to check for errors, then rolls back the committal before it processes the next row.
<b>Commit all valid rows from new batches:</b>	Select this option to validate the batch and then automatically commit each valid row. If a row does not validate, the program adds it to an exception batch which you can review later. Use this option when you need to add data as quickly as possible.

## Constituent Matching

The table below explains the items on the Constituent matching tab under **Set options**.

**Note:** Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

**Note:** The Constituent matching tab is available only for imports that use Constituent Update, Membership Dues, or Enhanced Revenue batch templates.

Screen Item	Description
<b>Use batch template settings</b>	Select this option to use the constituent matching settings defined on the batch template. If you update the matching settings on the associated batch template, the program updates the settings on the import process accordingly.  To use custom settings for this import process, clear <b>Use batch template settings</b> to enable the options below.

Screen Item	Description
<b>Check for records that match existing records</b>	<p>Select this option to identify records in the import process that may already exist as constituents in your database. Thresholds defined on this screen apply to all batches produced from the import process.</p> <p>Use the threshold settings to define your ranges for match confidence scores. <b>Match confidence</b> compares field values from the imported record with existing records and assigns match scores for fields weighted by the field type. Match confidence is calculated based on the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about how match confidence scores are calculated, see the <i>Constituent Duplicates and Merge Tasks Guide</i>.</p>
<b>Update constituents</b>	<p>Edit the percentage range for the <b>Matched constituents</b> threshold. Imported records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import. This process occurs behind the scenes and requires no actions from users.</p> <p><b>Note:</b> For Constituent Update batches, the program may update the existing constituent with information from the incoming constituent according to the constituent update rules. For more information about update rules, see <a href="#">Constituent Updates on page 135</a>.</p> <p>You can clear <b>Update constituents</b> to turn off automatic updates.</p>
<b>Review constituents</b>	<p>Edit the percentage range for the <b>Possible matches</b> threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent. For more information about how to compare records on the duplicate resolution screen, see <a href="#">Resolve Duplicate Constituents in a Batch on page 97</a>.</p> <p>You can clear <b>Review constituents</b> to turn off manual reviews. For example, you may clear <b>Review constituents</b> on an import when you have a high volume of records and no time or resources to manually compare records before committing. In this case, it might be better to quickly add new records and then find and delete duplicates later on.</p>
<b>Add new constituent</b>	<p>The percentage range for the <b>No match</b> threshold is based on your settings for the upper thresholds. Imported records with match scores in this range probably do not match an existing record.</p> <p>The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For enhanced revenue imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.</p>

## Date Formats

The table below explains the items on the Date formats tab under **Set options**.

## Screen Item Description

<b>Date format</b>	Specify how complete date values are formatted in the import file. You can select the format from the drop-down list or enter date specifiers to create a new format. The <b>Example</b> field displays how a date appears in the selected format.
<b>Fuzzy dates</b>	Specify how incomplete, or fuzzy, date values are formatted in the import file. You can select the format from the drop-down list or enter date specifiers to create a new format. The <b>Example</b> field displays how a date appears in the selected format.
<b>Month/day format</b>	Specify how date values that include only a month and day are formatted in the imported data. You can select the format from the drop-down list or enter date specifiers to create a new format. The <b>Example</b> field displays how a date appears in the selected format.

## Other

The table below explains the items on the Other tab under **Set options**.

## Screen Item Description

<b>Code table fields</b>	Select whether the import file contains the <b>Translation</b> or <b>ID</b> value of data to import from code table fields. To add new entries to a code table when entries do not exist for fields in the import file, mark <b>Add new entries</b> . If you are unsure which to select, consult your system administrator.
<b>Simple data list fields</b>	Select whether the import file contains the <b>Translation</b> or <b>ID</b> value of data to import from simple data list fields. If you are unsure which to select, consult your system administrator.
<b>Search list fields</b>	Select whether the import file contains the <b>ID</b> or <b>Quick find</b> value of data to import from search list fields. If you are unsure which to select, consult your system administrator.  For an import process based on the constituent update batch template, if you select to search list fields based on <b>Quick find</b> , the <b>Constituent</b> column within your import file must contain the constituent lookup ID.
<b>Other</b>	Select how to handle a blank value in the imported data. You can select to import the blank value ( <b>Blank value</b> ) or the default value from the selected batch template ( <b>Default value from batch</b> ).

## Constituent Updates

On the Constituent updates tab, under **Set options**, you can configure the update rules for an import process. These rules determine how the program updates names, birth dates, addresses, phone numbers, and emails on existing constituents when there are data conflicts such as similar names or addresses.

**Note:** The Constituent updates tab is available for import processes that use Constituent Update batch templates.

## Use batch template settings

When you select **Use batch template settings**, constituent update rules default from the batch template selected for the import process. To set different constituent update rules for an import process, clear **Use batch template settings** and use the options below.

## Name updates

Under **Name updates**, for the **If name is different from existing name** setting, select one of these options:

- **Update name**—Select this option to replace the name on the existing constituent with the name from the incoming constituent.
- **Add name as an alias**—Select this option to add the name from the incoming constituent as an alias to the existing constituent rather than replace an existing name. For example, if the incoming first name is "David" and the existing first name is "Dave," the program adds David an alias and leaves "Dave" as the first name.
- **Ignore name**—Select this option to never update the name on the existing constituent. For example, if the incoming first name is "David" and the existing first name is "Dave," the program leaves the first name as "Dave."
- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting names on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for names but **Update existing address** for addresses, the program does not automatically update the address fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the address from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming name.

For the **Retain existing name for historical reference** setting, to store the existing name on the constituent record under **Historical names**, select **Yes**. This occurs when the batch is committed. To discard the existing name, select **No**.

**Note:** Need a visual? View the [name update flowchart](#).

## Address updates

Under **Address updates**, for the **If incoming address is similar to an existing address** setting, select one of these options:

**Note:** "Similar" means the incoming address (**Street number**, **Street name**, and **Zip code**) is very close to an existing address, but there are differences in one or more of the address fields. To find similar addresses, the program compares the incoming address to each address on the existing constituent (home, business, etc.) and applies the address portion of the matching algorithm to calculate how similar the addresses are. When a pair of addresses score 86 or higher, they are considered similar. For example, if the existing street address is 1955 Main St. 29402 and the

incoming is 1956 Main St. 29402, their address matching score is 92, so the program applies the rule selected for the **If address is similar to an existing address** setting. If the incoming address is similar to multiple existing addresses, the program applies the rule to the existing address with the highest address matching score. If no existing addresses are found that are similar to an incoming address, the program applies the rule selected for the **If address is NOT similar to any existing address** setting.

- **Update existing address (old address will not be retained)** — Select this option to replace the address on the existing constituent with the address from the incoming constituent.

**Note:** For imported Constituent Update batches, if the constituent row includes the constituent ID as well as the address ID (generally only used in vendor files), the address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the address ID, the program applies the selected constituent update rule to the address.

- **Add as new address** — Select this option to add the incoming address as an additional address rather than update the existing address.
- **Ignore address** — Select this option to never overwrite the address on the existing constituent. The program discards the incoming address.
- **Require manual review (generate exception)**— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the address. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for addresses but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming address.

For the **If address is NOT similar to any existing address** setting, select one of these options:

- **Add as new address** — Select this option to add the incoming address as a new address to the existing constituent.
- **Ignore address** — Select this option to never add the incoming address to the existing constituent.
- **Require manual review (generate exception)**— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically add the address.

Under **When you add an incoming address as new**, you can select additional options for the new addresses. These options also apply to new addresses entered on the duplicate resolution screen.

For the **If new address had the same type as any existing address** setting, select one of these options:

- **Make existing address inactive** — Select this option to make inactive any existing addresses with the same address type as the new address. The program updates the **End date** field on the constituent for all existing addresses with that address type.

**Note:** If the new and existing addresses are similar and neither has an address type assigned, the program does not make the existing address inactive. If the new address is not similar to any existing addresses and it does not have an address type assigned, any existing addresses that do not have an address type assigned remain active.

- **Keep the existing address active**— Select this option to keep the existing address active and add the incoming address as an additional address with the same address type.

For the **Make new address primary** setting, select one of these options:

**Note:** If the existing constituent has no addresses, the primary address in the batch is always primary regardless of the option selected for **Make new address primary**.

- **Always** — Select this option to always make the new address primary. If a constituent has more than one new address in the batch, the one marked primary is made primary. If none of the new addresses is marked primary, the one that appears first in the batch is made primary.
- **Only if the current primary address has the same address type** — Select this option to make the new address primary only if it has the same address type as the existing primary address. If there are multiple new addresses in the batch and one has the same address type as the existing primary address, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and one of those new addresses is marked primary, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and none of those new addresses is marked primary, the one that appears first in the batch is made primary.
- **Never** —Select this option to never make the new address primary.

**Note:** Need a visual? View the [address update flowchart](#).

## Phone number updates

Under **Phone number updates**, for the **If incoming phone is not identical to any existing phone** setting, select one of these options:

- **Add as new phone** — Select this option to add the incoming phone number as a new number.
- **Ignore phone** — Select this option to never add the incoming phone number to the existing constituent.
- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting phone numbers on the duplicate resolution screen even if the match confidence score is high enough to automatically update the phone number. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for phone numbers but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming phone number.

**Note:** For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the phone ID (generally only used in vendor files), the phone number is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the phone ID, the program applies the selected constituent update rule to the phone number.

Under **When you add an incoming phone as new**, you can select additional options for the new phone numbers. These options also apply to new phone numbers entered on the duplicate resolution screen.

For the **If new phone has the same type as any existing phone** setting, select one of these options:

- **Make existing phone inactive** — Select this option to make inactive any existing phone numbers with the same phone type as the new phone number. The program updates the **End date** field on all existing phone numbers on the constituent with that phone type.
- **Keep existing phone active**— Select this option to keep the existing phone number active and add the incoming phone number as an additional phone number with the same phone type.

For the **Make new phone primary** setting, select one of these options:

**Note:** If the existing constituent has no phone numbers, the primary phone number in the batch is always primary regardless of the option selected for the **Make new phone primary** setting.

- **Always** — Select this option to always make the new phone number primary. If a constituent has more than one new phone number in the batch, the one marked primary is made primary. If none of the new phone numbers is marked primary, the number that appears first in the batch is made primary.
- **Only if the current primary phone has the same phone type** — Select this option to make the new phone number primary only if it has the same phone type as the existing primary phone number. If there are multiple new phone numbers in the batch and one has the same phone type as the existing primary phone number, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and one of those new phone numbers is marked primary, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and none of those new phone numbers is marked primary, the one that appears first in the batch is made primary.
- **Never** —Select this option to never make the new phone number primary.

**Note:** Need a visual? View the [phone number update flowchart](#).

## Email address updates

Under **Email address updates**, for the **If incoming email address is not identical to any existing email address** setting, select one of these options:

- **Add as new email address** — Select this option to add the incoming email address as a new email address.
- **Ignore email address** — Select this option to never add the incoming email address to the constituent.

- **Require manual review (generate exception)**—Select this option to always require a user to manually compare conflicting email addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select **Require manual review (generate exception)** for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select **Require manual review** for email addresses but **Update name** for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click **Use my organization's rules**, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming email address.

**Note:** For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the email ID (generally only used in vendor files), the email address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the email ID, the program applies the selected constituent update rule to the email address.

Under **When you add an incoming email address as new**, you can select additional options for the new email addresses. These options also apply to new email addresses entered on the duplicate resolution screen.

For the **If new email address has the same type as any existing email address** setting, select one of these options:

- **Make existing email address inactive** — Select this option to make inactive any existing email addresses with the same email type as the new address. The program updates the **End date** field on all existing email addresses on the constituent with that email type.
- **Keep existing email address active**— Select this option to keep the existing email address active and add the incoming email as an additional email address with the same email type.

For the **Make new email address primary** setting, select one of these options:

**Note:** If the existing constituent has no email addresses, the primary email address in the batch is always primary regardless of the option selected for **Make new email address primary**.

- **Always** — Select this option to always make the new email address primary. If a constituent has more than one new email address in the batch, the email marked primary is made primary. If none of the new email addresses is marked primary, the email that appears first in the batch is made primary.
- **Only if the current primary email address has the same email type** — Select this option to make the new email address primary only if it has the same email type as the existing primary email address. If there are multiple new email addresses in the batch and one has the same email type as the existing primary email address, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and one of those new email addresses is marked primary, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and none of those new email addresses is marked primary, the email that appears first in the batch is made primary.
- **Never** —Select this option to never make the new email address primary.

**Note:** Need a visual? View the [email address update flowchart](#).

## Start an Import Process

Once you add an import process to the database, you can run the process to import data and add the batch to the database. You can run an import process directly from the Import page. In the **Import processes** grid, click the double arrows next to a process to expand its row. On the action bar, click **Start import**. The import process status page appears and displays the status of the process. When the import process finishes, the **Status** field on the Recent Status tab displays "Completed."

For more information about the items on the status page, see [Tabs of a Process Status Page on page 109](#).

**Note:** You can also start an import process from its status page. On the import process status page, click **Start process** under **Tasks**.

When you run an import process, the program uses the selected batch template to import the information in the selected import file into a new batch. After you run the import process, the new batch appears on the Uncommitted Batches tab of the Batch Entry page.

**Note:** When you import constituent records that do not include lookup IDs or system IDs into a batch, the program automatically uses the name and address entered to verify the constituent does not already exist in the database. When the program finds another constituent with the same information, it links the constituent in the import file to the existing constituent record. When the program finds multiple constituents with similar information, it flags the constituent in the batch as a possible duplicate.

In **Batch entry**, you can add or edit data entry in the batch, submit the batch for approval, and commit the batch to the database. When a batch is committed to the database, the program uses its information to add or update records in the database. To access the Batch Entry page, from *Administration*, click **Batch entry**. Batches created by an import process have a description of "Batch created by the... import process". For more information about the batch entry page, see [on page 54](#).

**Note:** Depending on your security rights and system role, you can also edit the data entry of a batch created by an import process from the import process status record. On the import process status page, click **Go to batch entry** under **Tasks**. The data entry screen of the batch appears. For more information about the batch data entry screen, see [Batch Data Entry Screen on page 69](#).

## Import Process Page

After you run an import process, you can view information about the process on its status page. These details help you track transactions for auditing and reconciliation purposes from the original import file, to a batch, and finally to a constituent record. This information also helps you quickly identify and resolve issues in import files that prevent data from importing.

The summary section at the top of the page includes the current scheduling, batch template and file mapping template, import file name, when the import was created, the number of times run, and the number of batches created from the process.

Each time you run an import process, the program generates a status record for the instance. On the Recent Status tab, you view the details about the most recent instance of the import process. On the History tab, you view historical status record information about each instance of the process. On the Job Schedules tab, you can view details about when the import process is scheduled to run.

## Recent Status Tab

On the Recent Status tab, you view the details about the most recent instance of the import process. These details include the status of the process; status message; the person who last started the process; the start time, end time, and duration of the process; the name of the server most recently used to run the process; the total number of records processed; how many of those records processed successfully; and how many were import file exceptions. The tab also includes links to the last batch created from the process and to the exception batch if exceptions occurred.

If there are batch validation errors in the import, such as missing data, these appear in the **Exceptions** grid at the bottom.

## History Tab

Each time you run an import process, the program generates a status record for the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status, process type (Import or Import + Commit), import file name, date and time started, duration, number of records processed, and server name.

When you select an instance, it expands to show additional information such as details about why an import failed. If the import is set to commit batches automatically, this section includes the number of records imported and committed, as well as links to the committed batch and exception batch if exceptions occurred. If the import is not set to commit batches automatically, this section includes a link to the uncommitted batch and displays the scheduled commit date and time. If the process fails, you can click **Export** to export a copy of the import file to correct errors and then reimport. The **View report** link appears for batch types with associated validation or control reports. For revenue batch types, a totals section includes the projected vs. imported number of records and total revenue.

To reduce the amount of time it takes to find a process instance, you can filter the records that appear in the grid. For example, you can select to view only status records with a **Status** of Did not finish.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

## Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history. To delete a status record, select it and click **Delete**.

### ➤ Delete a status record from the History tab

1. On the History tab of the process status page, click the double arrows beside a status record and click **Delete**. A confirmation message appears.

**Note:** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

## Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

### Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight.

**Note:** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

## > Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.

**Create job**

**Details**

Job name:

Schedule type:

Enabled

**One-time occurrence**

Date:  Time:

**Frequency**

Occurs every:  day(s)

**Daily frequency**

Occurs once at:

Occurs every:   Starting at:

Ending at:

**Duration**

Starting at:   End date:

No end date

Help Save Cancel

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
  - a. For a process that runs once, select the date and time to run it.
  - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

time or at regular intervals on the days when it runs.

- c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

## Create Job Screen

### Screen Item Description

<b>Job name</b>	Enter a name for the job schedule.
<b>Schedule type</b>	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
<b>Enabled</b>	By default, the scheduled process is active. To suspend the process, clear this checkbox.
<b>One-time occurrence</b>	For a process that runs once, select the date and time to run it.
<b>Frequency</b>	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the <b>Occurs every</b> field.  For a weekly process, select the day of the week to run it.  For a monthly process, select the day of the month to run it.
<b>Daily frequency</b>	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.  To run a process once, select <b>Occurs once at</b> and enter the start time.  To run a process at intervals, select <b>Occurs every</b> and enter the time between instances, as well as a start time and end time.
<b>Start date</b>	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select <b>No end date</b> .

## Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

### > Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to [Create Job Screen on page 145](#).

2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

## Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

### > Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

## Start Process

This task allows you to start the selected business process from the process page.

## Edit Process

This task allows you to edit the selected business process from the process page.

## Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

## Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

## Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from

the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

## Process Status Report

When you execute a process, the process generates a status report which is housed on the Recent status tab of the process page. For example, if you execute a sponsorship transfer process, the Transfer Report appears on the Recent status tab which lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships, and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

## Generate Windows Scripting File

A Windows Scripting File (\*.wsf) is an executable script file format for Windows that can incorporate VBScript (\*.vbs) routines and include XML elements. To create a scripting file, click **Generate WSF** under **Tasks**. Your browser prompts you to open or save the file.

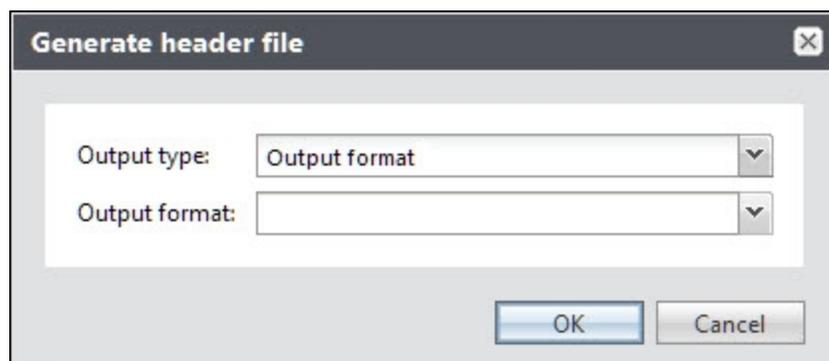
### ➤ Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

**Note:** The download process varies according to the browser you use.

## Generate a Header File

To personalize a communication with information specific to its topic or recipient, you can use merge fields in your Microsoft *Word* (.docx) document. To specify the merge data to include in the document, you must generate a header file that includes the merge fields. When you generate a header file, you create a comma-separated values (\*.csv) file based on an output format, with fields defined by the program, or an export definition, with fields you define. In *Word*, you can use this header file to merge the data with your document. To generate a header file for a communication, click **Generate header file** under **Tasks**. The Generate header file screen appears.



The screenshot shows a dialog box titled "Generate header file". It has a standard Windows-style title bar with a close button (X) in the top right corner. The main area of the dialog contains two dropdown menus. The first is labeled "Output type:" and has "Output format" selected. The second is labeled "Output format:" and is currently empty. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- If you select Output format, select the output format that contains the merge fields to include.
- If you select Export definition, search for and select the export definition that includes the merge fields to include. For information about how to set up an export definition, refer to the *Query and Export Guide*.

When you click **OK**, the browser downloads the header file, based on the selected output format or export definition, for use in *Word*.

## Go to Batch Entry

After running an import process, you can click **Go to batch entry** under **Tasks** to access the batch created by the import process.

# Batch Entry Reports

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**Batch Exception Report** ..... 150

**Revenue Batch Validation Report** ..... 150

Several reports are available to help you track records entered in a batch and correct the exceptions generated when you commit a batch.

## Batch Control Report

On the Commit parameters screen, when you select **Create control report**, you can view a control report after you commit the batch to the database. The control report lists records in the batch that were committed to the database and provides information about each record. The information that appears depends on the type of batch selected. For example, a control report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. By default, a revenue batch control report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.

Enhanced Revenue Batch Control Report						
Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Designation / Event
Max G. Taylor	77	1/09/2014	Payment (donation)	\$500.00	Check	Library Fund
John T. Smith	71	1/09/2014	Payment (donation)	\$150.00	Cash	Library Fund
Mary Young	8-10000137	1/09/2014	Payment (donation)	\$100.00	Check	Library Fund
Kenneth Parker	125	1/09/2014	Payment (donation)	\$500.00	Cash	Library Fund

You can view a batch control report on the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **View control report**.

You can also view a control report from the commit status page of a batch. Under **Reports**, select **View control report** from the Explorer bar.

## Batch Exception Report

When you commit a batch to the database, the batch commit status page appears and displays the number of records that did and did not commit to the database. Records that did not commit are called exceptions. A batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. The information that appears depends on the type of batch selected. For example, an exception report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.

Enhanced Revenue Batch Exception Report						
Originating batch number: 18		No. of exceptions:		1	Exceptions total: 22,0000	
Exception batch number: 19		Owner: BLACKBAUD\BA				
Payments:		1		Total payments: \$22.00		
Pledges:		0		Total pledges: \$0.00		
Recurring gifts:		0		Total recurring gifts: \$0.00		
Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Reason for Exception
Julie M. Bach	6	2/3/2014	Payment	\$22.00	Cash	You must have at least one application.
2/3/2014 at 11:32 AM		Prepared by: BLACKBAUD\BA			Page 1 of 1	

You can view a batch exception report on the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to a batch to expand its row. On the action bar, click **View exception report**.

You can also view an exception report from the commit status page of a batch. Under **Reports**, select **View exception report** from the Explorer bar.

## Revenue Batch Validation Report

For an enhanced revenue batch, the Enhanced Revenue Batch Validation Report displays the number and properties of the batch; calculates the total count and monetary amount of the payments, pledges, recurring gifts, and matching gift claims in the batch; and lists the transactions entered in the batch.

For revenue update batches, the Revenue Update Batch Validation Report compares the values of each of the fields in the batch with what is already in the database and displays which fields are being changed in the batch, what the previous value was, and what the new value is.

For each transaction listed, the report provides the constituent associated with the transaction, revenue type, amount of the revenue, date associated with the transaction, and designations to which the revenue is applied. By default, a revenue batch validation report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the

time and date the report was generated, the user who generated the report, and the report page number and count appear.

**Enhanced Revenue Batch Validation Report**

1 of 1 Find | Next

Enhanced Revenue Batch Validation Report							
Batch number:	60	Projected #:	0	Projected total:	\$0.00		
Status:	Uncommitted	Current #:	3	Current total:	\$2,050.00		
Owner:	BLACKBAUD/IBA						
		Payments:	3	Total payments:	\$2,050.00		
		Pledges:	0	Total pledges:	\$0.00		
		Recurring gifts:	0	Total recurring gifts:	\$0.00		
		MG claims:	0	Total MG claims:	\$0.00		
Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Appeal	Designation/Event
Max G. Taylor	77	2/2/2014	Payment	\$1,000.00	Cash	NEWSLETTER	Acquisition Fund
John T. Smith	71	2/2/2014	Payment	\$500.00	Cash	NEWSLETTER	Acquisition Fund
Mary Young	8-10000137	2/2/2014	Payment	\$550.00	Cash	NEWSLETTER	Acquisition Fund

2/2/2014 at 2:49 PM Prepared by: BLACKBAUD/IBA Page 1 of 1

You can view the Enhanced Revenue Batch Validation Report from the Batch Entry page. From the Committed Batches tab, in the **Committed batches** grid, click the double arrows next to an enhanced revenue batch to expand its row. On the action bar, click **Validation report**.