

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 20](#).

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 58](#).

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 189](#).

> 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 74](#).

> 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 140](#).

> 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 151](#).

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 21](#).

> 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 24](#).

> 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 29](#).

> 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 61](#).

> 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 74](#).

> 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 71](#).

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 189](#).

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 152](#).

➤ 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 155](#).

➤ 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 160](#).

➤ 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 161](#)

➤ 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 181](#).

> **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 71](#).

> **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 189](#).

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 30](#).
- 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 151](#).
- 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 30](#).

> 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 80](#).

- 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 65](#).
- 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 78](#).

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 67](#).

> 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*.
- With Microsoft *Exchange* server integration, you can download calendar items, email messages, and contact record updates from Microsoft *Outlook* into a batch. For information about how to download information from Microsoft *Outlook*, see the *Exchange Integration Guide*.
- When your organization integrates with **Blackbaud Internet Solutions**, you can download web transactions from **Blackbaud Internet Solutions** into uncommitted batches. For information about how to download information from **Blackbaud Internet Solutions**, see the *Web Transaction Guide*.
- A finder number is a unique, sequential number assigned to each constituent record in a marketing effort. Finder numbers are typically printed on the reply device and can be formatted for barcode scanners. During batch entry, users enter or scan the finder number and the batch automatically populates the donor's name, address, and source code. Using finder numbers for data entry is quicker and allows you to track revenue to the appeal the donor received. For more information about finder numbers, see the *Marketing Efforts 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:

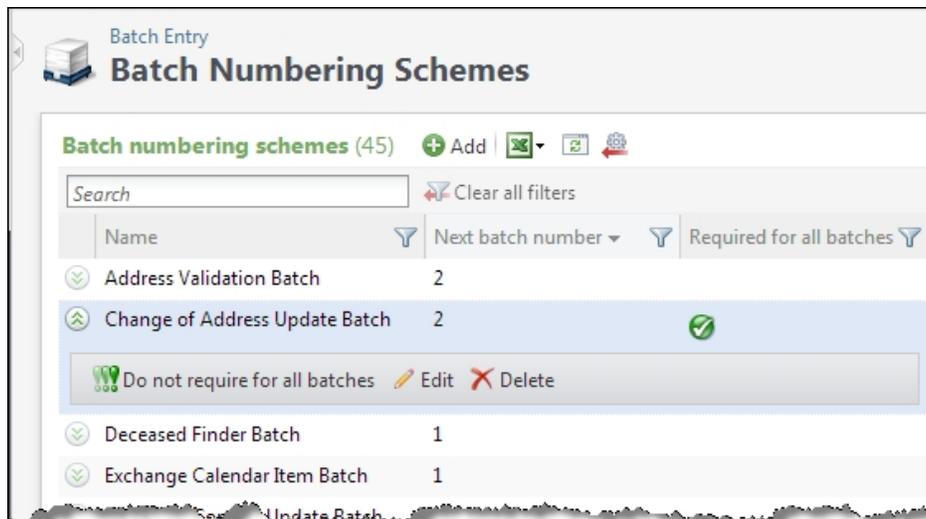
- Configure a batch numbering scheme to determine how the program generates numbers to identify a batch.
- Configure a batch workflow to determine the states the batch must complete before its records can commit to the database.
- Configure a batch template to define basic information about the batch, 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 11](#).

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 keep batch numbers consistent and prevent duplicate batch numbers, you can apply one numbering scheme to all auto-generated batches, regardless of batch template type. Click the double arrows beside a numbering scheme to expand its row and display an action bar. From the action bar, click **Required for all batches**. After you make a numbering scheme required, all existing batch templates use this global numbering scheme as well as all future batch templates.

Note: Numbering starts with the next batch number in the required scheme that is not a duplicate of an existing batch. For example, if the next number available in the global scheme is 50, but there are already existing batches using numbers 51 through 120, the required scheme starts numbering at 121 to prevent duplicates.

To turn off the required numbering scheme, select the numbering scheme and click **Do not require for all batches**. The required numbering scheme is no longer applied to all batches; however, this scheme remains the default on existing batch templates unless a different scheme is selected.

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.

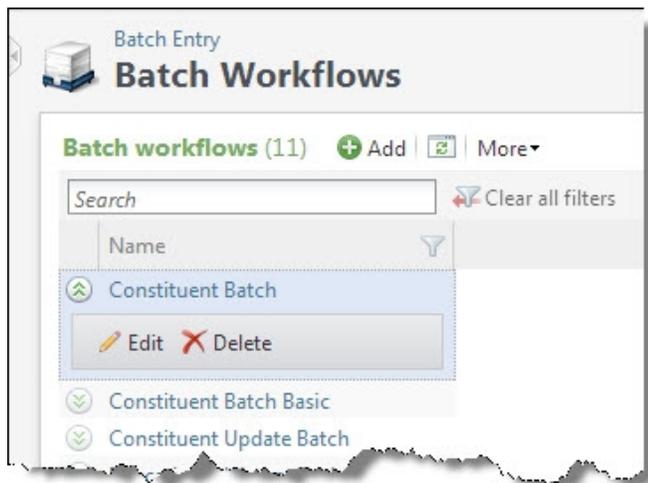
Note: Before you save the numbering scheme, we recommend you verify that batch numbers are formatted correctly in the preview fields.

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**.

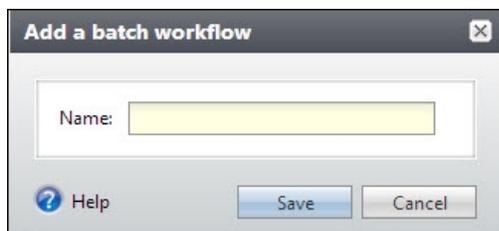
Warning: When a batch workflow is associated with a batch template, you cannot delete the batch workflow until it is removed from use on the batch template.

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 26](#).

> 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 26](#).

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 26](#).

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 a Batch Workflow Step on page 28](#).

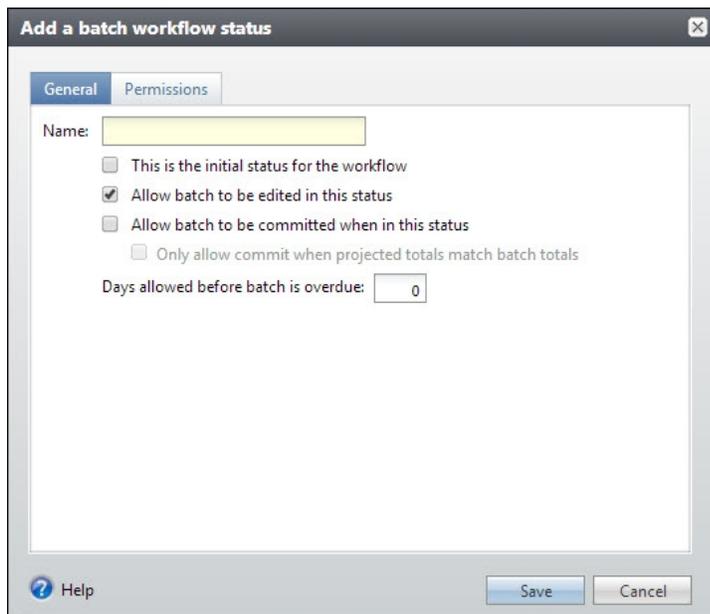
Add a Batch Workflow Status

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.

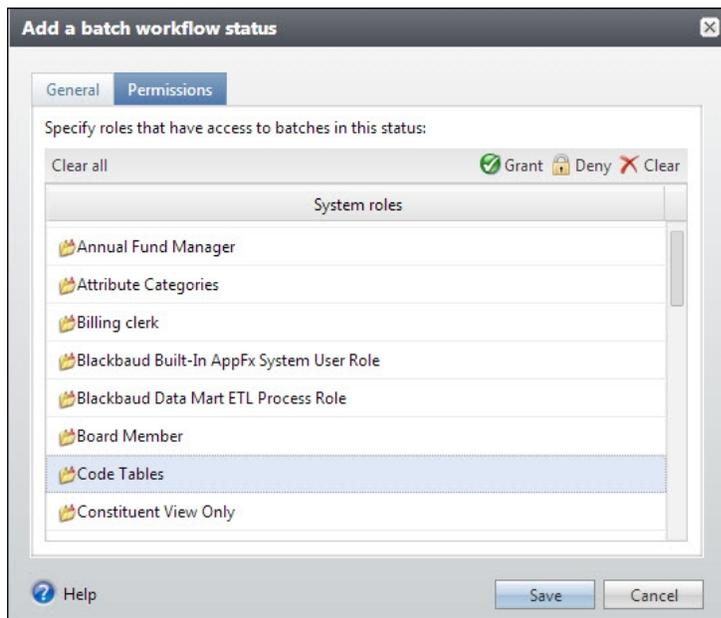
Note: You can also access the Add a batch workflow status screen within the **From status** and **To status** fields on the Edit batch workflow steps screen.



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 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"

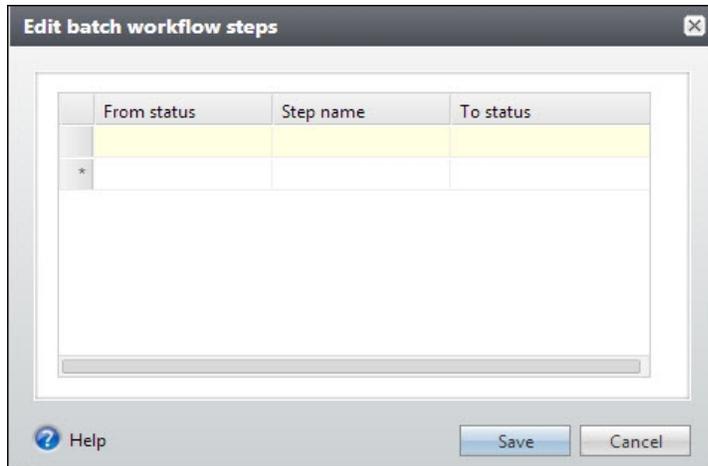
From status: "Submitted" **Step name:** "Approve" **To status:** "Approved"

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 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.



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**.

Batch Entry
Batch Templates

Batch templates (6) Add Filters More

Sites: All sites Category: Constituent Include inactive Apply Reset

Name	Workflow	Numbering scheme	Category	Import only	Active	Site
433522_CUB	Constituent Update Batch	Constituent Update Batch	Constituent		✓	
Address Validation Batch	Address Validation Batch	Address Validation Batch	Constituent		✓	
Constituent Batch	Constituent Batch	Constituent Batch	Constituent		✓	
Constituent Batch Basic	Constituent Batch Basic	Constituent Batch	Constituent		✓	
Constituent Update Batch	Constituent Update Batch	Constituent Update Batch	Constituent		✓	
DeceasedRecordFinder Batch	Deceased Finder Batch	Deceased Finder Batch	Constituent		✓	

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.

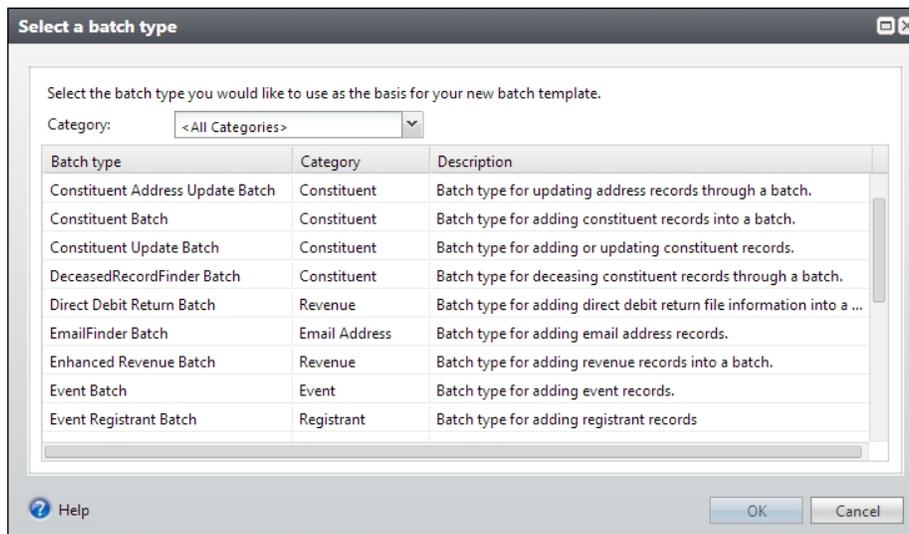
Tip: You can use the same batch template for multiple batches.

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 49](#).

Add a Batch Template

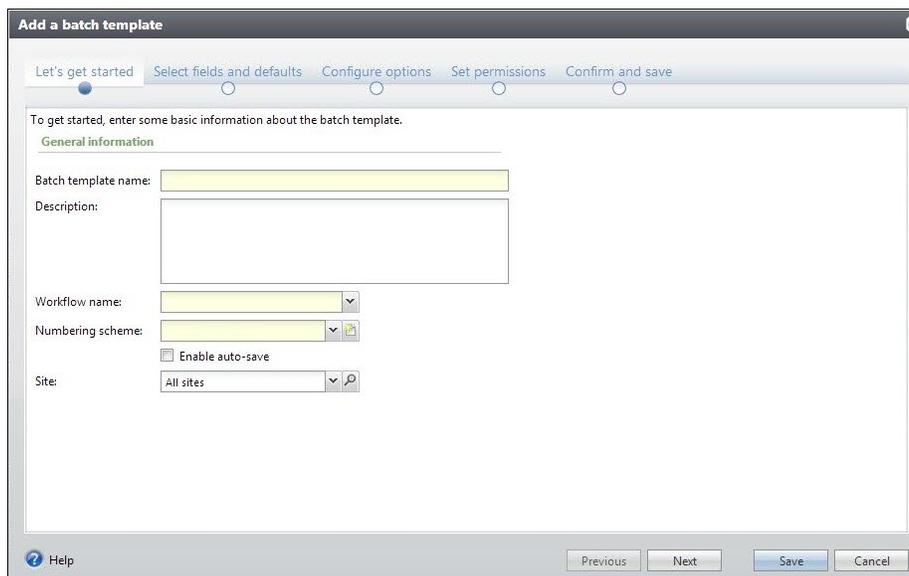
Before you can add a batch to the database, you must create the batch template. Batch templates define basic information about the batch, such as the fields included in the batch and default values for the fields.

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 30](#).

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 24](#).
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.

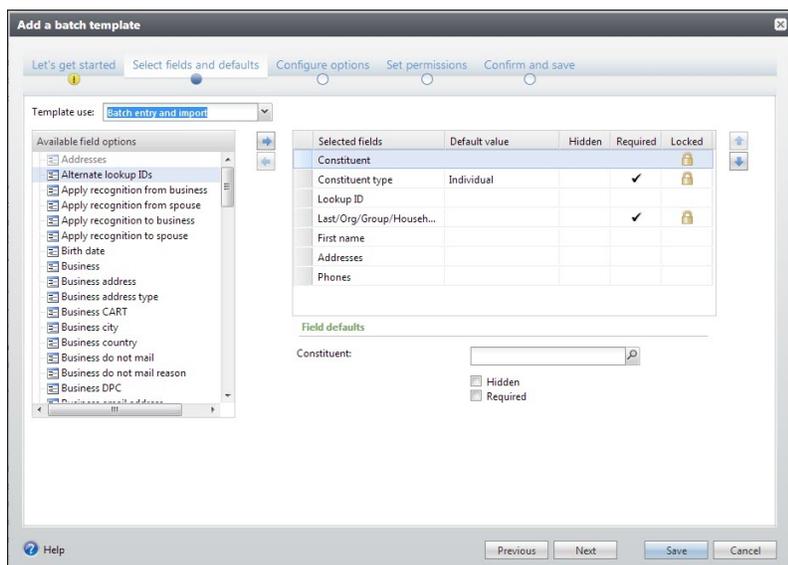
When you use a global numbering scheme (one that has been marked required), the **Numbering scheme** field displays the name of the global scheme and is disabled. For more information about numbering schemes, see [Configure Batch Numbering Schemes on page 21](#).

5. Select **Enable auto-save** when you want the batch to automatically save each row as you work.
6. In the **Site** field, select the site you want to associate with this batch template.
7. 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 30](#).

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.

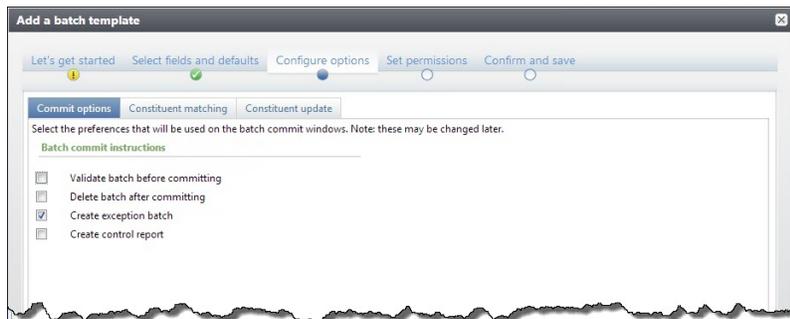
Tip: To prevent the creation of blank address records, we recommend you delete default address information from the batch row when you add a record with no address data.

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 30](#).

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.

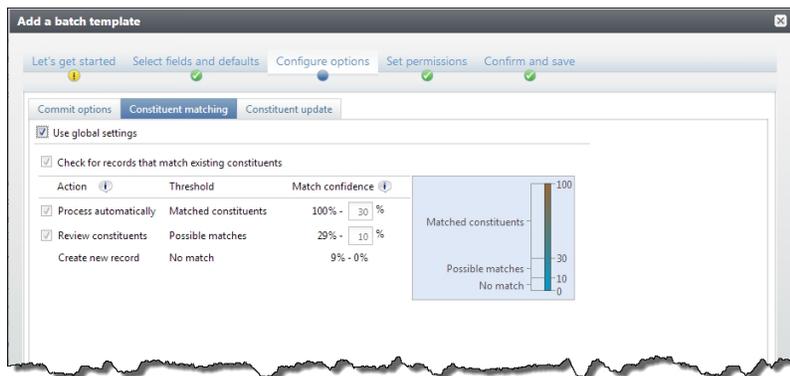


2. Under **Configure options**, on the Commit options tab, select which actions the program should complete when it commits the batch.
 - To validate the batch before you commit it to the database, select **Validate batch before committing**.

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, Revenue Update, and Sponsor.



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 and Enhanced Revenue 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 39](#). For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.

- 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.

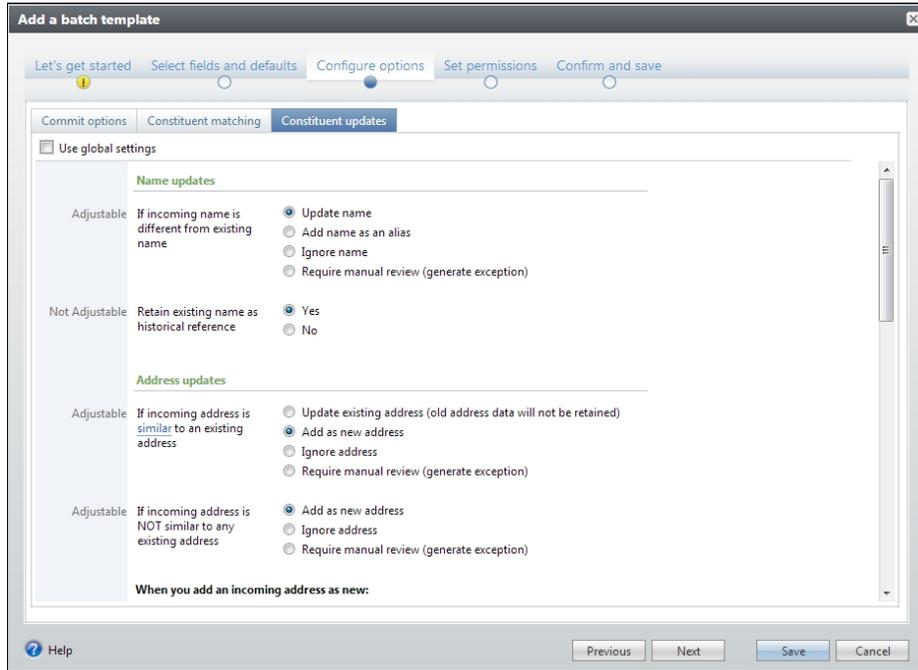
For more information about how to compare records on the duplicate resolution screen, see [Resolve Duplicate Constituents in a Batch on page 129](#).

- 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 and Enhanced Revenue 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**, constituent update rules default from Global data entry settings page in *Administration*. If you update constituent update rules in *Administration*, the program updates the settings on this batch template accordingly.

To set different constituent update rules for an 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 174](#).

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
Validate batch before committing	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.
Delete batch after	Select this checkbox to delete the batch after you commit it to the database. If you select

Screen Item	Description
committing	to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.
Create exception batch	Select this checkbox to create a batch of all records that do not commit to the database.
Create control report	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 *Administration Guide*.

Note: The Constituent matching tab is available for these batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor.

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

Screen Item	Description
Use global settings	When you select Use global settings , 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.
Check for records that match existing constituents	To set different matching settings for a batch template, clear Use global settings , select Check for records that match existing constituents , and then adjust the thresholds.
Process automatically	<p>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 batch. This process occurs behind the scenes and requires no actions from users.</p> <p>Note: For Constituent Update and Enhanced Revenue 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 39. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or</p>

Screen Item	Description
	<p>conflicting data. No updates are made to the existing constituent.</p> <p>You can clear Process automatically to turn off automatic updates.</p>
Review matches	<p>Edit the percentage range for the Possible matches 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 Resolve Duplicate Constituents in a Batch on page 129.</p> <p>You can clear Review matches to turn off manual reviews.</p>
Create new record	<p>The percentage range for the Create new record 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 revenue, enhanced revenue, or revenue update 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

The table below explains the items on the Constituent updates tab under **Configure options**.

For detailed information about how the program uses constituent update rules to resolve conflicts, see the *Administration Guide*.

Note: The Constituent updates tab is available for only Constituent Update and Enhanced Revenue batch templates.

The program performs data updates according to the rules you specify on this tab:

Screen Item	Description
Use global settings	<p>When you select Use global settings, constituent update rules default from Global data entry settings page in <i>Administration</i>. If you update constituent update rules in <i>Administration</i>, the program updates the settings on this batch template accordingly.</p> <p>To set different constituent update rules for an import process, clear Use global settings and use the options below.</p>
Name updates	<p>Under Name updates, for the If name is different from existing name setting, select one of these options:</p> <ul style="list-style-type: none"> • 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

Screen Item	Description
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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.

Screen Item	Description
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Note: For imported Constituent Update or Enhanced Revenue 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

Screen Item	Description
	<p>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.</p> <ul style="list-style-type: none"> • 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. <p>For the Make new address primary setting, select one of these options:</p> <p>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.</p> <ul style="list-style-type: none"> • 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. <p>Note: Need a visual? View the address update flowchart.</p>
Phone number updates	<p>Under Phone number updates, for the If incoming phone is not identical to any existing phone setting, select one of these options:</p> <ul style="list-style-type: none"> • 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

Screen Item	Description
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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](#).

Screen Item	Description
Email address updates	<p>Under Email address updates, for the If incoming email address is not identical to any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new email address — Select this option to add the incoming email address as an 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. <p>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.</p> <p>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.</p> <p>For the If new email address has the same type as any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • 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. <p>For the Make new email address primary setting, select one of these options:</p> <p>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.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new email address primary. If a

Screen Item Description

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.

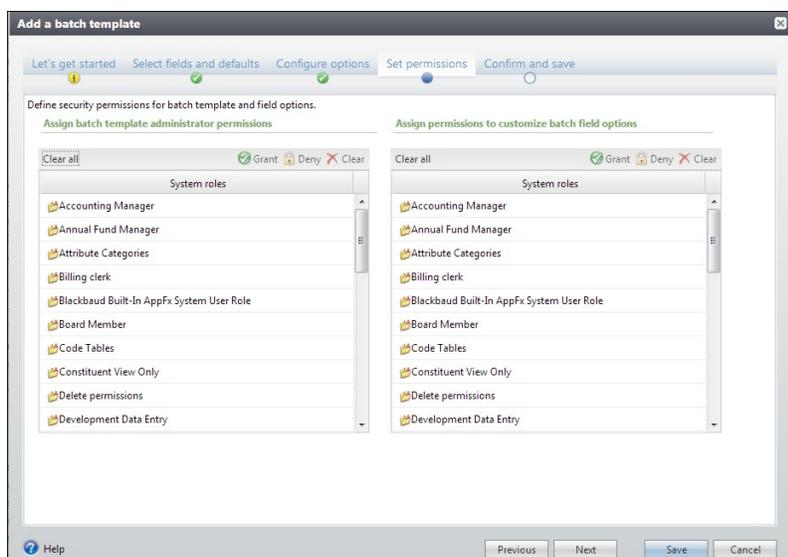
- **Only if the current primary email address has the same email type** — Select this option to make the new email address primary only if it has the same email type as the existing primary email address. If there are multiple new email addresses in the batch and one has the same email type as the existing 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 30](#).

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 30](#).

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 a dialog box titled "Add a batch template" with a progress bar at the top. The progress bar has five steps: "Let's get started", "Select fields and defaults", "Configure options", "Set permissions", and "Confirm and save". The "Confirm and save" step is currently active. Below the progress bar, there is a message: "Review your batch template selections, click the previous button to edit, save when finished." The dialog is divided into two main sections: "General information" and "Commit options".

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					

At the bottom of the dialog, there are buttons for "Help", "Previous", "Next", "Save", and "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.

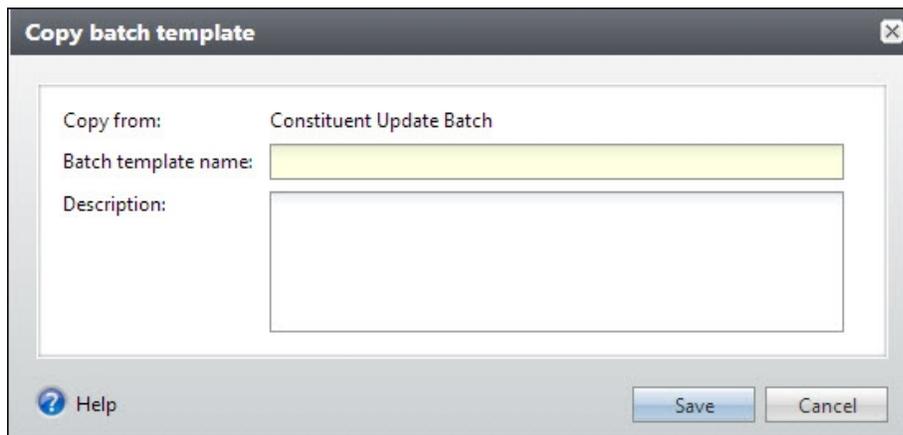
Copy a Batch Template

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 161](#).

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
Constituent type	Enter the type of constituent to add. This field is required. To add a person such as a donor or an employee as a constituent, enter "Individual." To add a business or company that supports your mission as a constituent, enter "Organization." To add a group of constituents who donate together under one entity such as a giving circle, enter "Constituent group."
Title	For an individual constituent, enter the title of the individual such as "Mr.," "Mrs.," or "Dr."
First name	For an individual constituent, enter the first name of the individual.
Last/org/group/household name	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.
Suffix	For an individual constituent, enter the suffix of the individual such as "Jr.," "III," or "PhD."
Address type	Enter the type of address to add for the constituent such as "Home" or "Business."
Address	Enter the street address of the constituent, including apartment or suite number. When the address requires multiple address lines, press ENTER 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 ALT + ENTER on your keyboard to move to a new line within the cell.

Field	Description
City	Enter the city of the constituent.
State	Enter the state of the constituent.
Country	Enter the country of the constituent, such as "United States."
Zip code	Enter the Zip code of the constituent.
Phone type	Enter the type of phone number to add for the constituent, such as "Home" or "Business."
Phones—Phone number	Enter the phone number of the constituent.
Phones—Primary	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."
Phones—Call after	When the constituent requests you not call until after a specific time of day, enter the time to allow calls to the constituent.
Phones—Call before	When the constituent requests you not call after a specific time of day, enter the time to stop calls to the constituent.
Phones—Start date	When the phone number is active only after a specific date, enter the date to begin using the number.
Email address	Enter the email address for the constituent.
Spouse first name	For an individual constituent with a spouse, enter the first name of the spouse.
Spouse last name	For an individual constituent with a spouse, enter the last name of the spouse.
Spouse copy address	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."
Academic catalog program	Select the constituent's program at the institution, such as "Undergraduate."
Academic catalog degree	Select the degree of the program the constituent attends at the institution.
Constituent site	Select the site you want to associate with the record. Records that can be associated with more than one site have a Site grid, instead of a Site 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
Name	Enter the name of the event. This field is required.
Start date	Enter the date of when the event starts. This field is required.
Appeal	Enter the name of the appeal to associate with the event.
Capacity	Enter the number of participants the event can accommodate.
Category	To help classify the event, enter its category or type such as "Reception" or "Sporting event."
Contact	Enter the name of the constituent who serves as a contact at the location of the event.
Coordinators	Enter the name of the staff member who serves as an event coordinator for the event.
Description	Enter a description to help further identify the event.
End date	Enter the date on which the event ends.
End time	Enter the time at which the event ends.
Expenses—Type	Enter the type of expense to add for the event, such as "Supplies."
Expenses—Vendor	Enter the name of constituent who serves as a vendor that performs the service associated with the expense.
Expenses—Budgeted amount	Enter the total amount budgeted for the expense.
Expenses—Agreed amount	Enter the total amount agreed upon with the vendor associated with the expense.
Expenses—Amount paid	Enter the total amount paid toward the vendor associated with the expense.
Expenses—Due date	Enter the date when payment for the expense is due to the vendor.
Expenses—Date paid	Enter the date your organization pays the vendor associated with the expense.
Expenses—Comment	Enter any additional information about the expense.
Location	Enter the name of the location where the event occurs.
Prices—Registration type	Enter the type of registration price to associate with the event, such as "Family" or "Corporate sponsor."
Prices—Name	Enter the name of the price associated with the registration type.
Prices—Registration count	Enter the total number of registrations to associate with the registration type. For example, for a registration type of Golf Foursome, enter "4."
Prices—	Enter the amount a registrant pays to attend the event as the registration type.

Field	Description
Registration fee	
Prices—Cost	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.
Start time	Enter the time at which the event begins.
Tasks—Owner	Enter the name of the staff member assigned the task.
Tasks—Name	Enter the name of the task to associate with the event, such as "Call the caterer."
Tasks—Due date	Enter the date by which the owner must perform the task.
Tasks—Comment	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
Event	Enter the name of the event associated with the registration. This field is required.
Registrant	Enter the name of the constituent to register for the event. This field is required.
Status	Enter the status of the registration, such as "Registered" or "Attended."
Registration option	Enter the name of the registration price at which the registrant registers for the event, such as "Adult" or "Family." This field is required.
Quantity	Enter the number of registrations the registrant registers for the event. For example, when a registrant registers for two Adult registration, enter "2."
Guests—Guest	Enter the name of the constituent who the registrant registers as a guest.
Guests—Waive registration fee	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."
Guests—Attended	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."
Waive benefits	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."

Field	Description
Date	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
Account system	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.
Constituent	Enter the name of the constituent associated with the revenue transaction.
Lookup ID	Enter the primary lookup ID of the constituent associated with the revenue transaction.
Amount	Enter the total amount of the revenue transaction.
Date	Enter the date to associate with the transaction, such as the date your organization receives the revenue.
Revenue type	Enter the type of revenue transaction to add: "Payment," "Pledge," or "Recurring gift."
Payment method	Enter the payment method, such as "Cash" or "Credit card."
Application	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> .
Appeal	If the transaction is in response to an appeal, enter the name of the appeal.
Opportunity	Enter the opportunity to which you want to apply the revenue, if any.
Designation	Enter the designation to which you want to apply the revenue.
GL post status	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."

Revenue Update Batch

The table below explains the default fields included in the Revenue Update Batch template. You can use this batch template to update existing revenue records. For more information about revenue data entry fields, see the *Revenue Guide*.

Field	Description
Revenue	Enter the existing revenue transaction you want to update.

Field	Description
Account system	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.
Constituent	Enter the name of the constituent associated with the revenue transaction.
Lookup ID	Enter the primary lookup ID of the constituent associated with the revenue transaction.
Amount	Enter the total amount of the revenue transaction.
Date	Enter the date to associate with the transaction, such as the date your organization receives the revenue.
Revenue type	Enter the type of revenue transaction to add: "Payment," "Pledge," or "Recurring gift."
Payment method	Enter the payment method, such as "Cash" or "Credit card."
Application	Select how to apply the payment. For example, the revenue may be a donation or payment towards an unapplied matching gift claim.
Appeal	If the transaction is in response to an appeal, enter the name of the appeal.
Opportunity	Enter the opportunity to which you want to apply the revenue, if any.
Designation	Enter the designation to which you want to apply the revenue.
GL post status	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."
GL post date	Specify the post date of the revenue in the General Ledger.
Adjustment date	Enter the date of the revenue adjustment.
Adjustment post date	Enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.
Adjustment details	Enter any additional information about the revenue adjustment.
Adjustment reason	Select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.
Adjustment post status	Select "Not posted" or "Do not post" as the post status for the adjustment.
Update tributes	If a payment or pledge transaction amount is changed, regardless of whether it is posted or not posted, the tribute amount associated with the transaction will update proportionately. For example, if a pledge of \$100 that has an associated tribute of \$30 is changed to \$70, then the tribute will update to \$21.

Auction Item Batch

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

Field	Description
Constituent	Enter the name of the constituent who donated the auction item. This field is required.
Lookup ID	Enter the primary lookup ID of the constituent associated with the auction item.
Item name	Enter the name of the auction item. This field is required.
Category	Select the auction item category.
Subcategory	Select the auction item subcategory if applicable.
Description	Enter a description to help further identify the auction item.
Auction	Enter the name of the auction to associate with the item.
Designation	Enter the name of the designation for which to apply the revenue received from the item. This field is required.
Value	Enter the fair market value of the item.
Minimum bid	Enter the monetary amount at which to start bids for the item.
Donation date	Select the date your organization received the item as a donation. This field is required.
Expiration date	If the item must be used within a specific time period, select the expiration date.
Given anonymously	Select the checkbox if the auction item was donated anonymously.
Account system	If your organization uses multiple account systems, select the one to which to associate the auction item.
Post date	Enter the date to associate with the posting of the auction item.
Post status	Select the post status for the auction item.

Batch Types

The following table lists the types of batches you can create in the program.

Batch Type	Description
Account Batch	Batch type for adding account records batch.
Account By Account System Batch	Batch type for adding account records by account system.

Batch Type	Description
Account Segment Mapping Batch	Batch type for adding account segment mappings.
Account Segment Mapping By Account System Batch	Batch type for adding account segment mappings by account system.
Address Validation Batch	Batch type for updating constituent address records following the address validation process.
Address Finder Batch	Batch type for updating constituent address records through a batch.
Auction Item Batch	Batch type for adding auction item records.
BBIS Event Registration Transaction Batch	Batch type for adding Blackbaud Internet Solutions event registration transaction records into a batch.
BBIS Profile Update Transaction Batch	Batch type for adding Blackbaud Internet Solutions profile update transaction records into a batch.
Constituent Address Update Batch	Batch type for updating address records through a batch.
Constituent Batch	Batch type for adding constituent records into a batch.
Constituent Update Batch	Batch type for adding or updating constituent records.
Currency Exchange Rate Batch	Batch type for adding currency exchange rate records into a batch.
Deceased Record Finder Batch	Batch type for deactivating constituent records through a batch.
Direct Debit Return Batch	Batch type for adding direct debit return file information into a batch.
Direct Marketing Effort Batch	Batch type for adding direct marketing effort records into a batch.
Educational History Update Batch	Batch type for adding or updating educational history records.
Email Finder Batch	Batch type for adding email address records.
Enhanced Revenue Batch	Batch type for adding revenue records into a batch.
Event Batch	Batch type for adding event records.
Event Registrant Batch	Batch type for adding registrant records.
Exchange Calendar Item Batch	Batch type for updating interaction records using changes made to linked Exchange calendar items.
Exchange Contact Update Batch	Batch type for updating constituent records using changes made to linked Exchange contact records.
Exchange Email Batch	Batch type for adding Exchange emails to constituent records.
Fundraising Purpose Financial Info Batch	Batch type for adding designation level financial information records.
Giving Summary Update Batch	Batch type for adding or updating giving summary information on constituent records.

Batch Type	Description
Interaction Batch	Batch type for adding interaction records.
Membership Dues Batch	Batch type for adding membership dues.
Model Scores and Ratings Batch	Batch type for model scores and ratings.
Model Scores and Ratings Update Batch	Batch type for adding or updating model scores and ratings information on constituent records.
People Finder Batch	Batch type for adding PeopleFinder address records.
Phone Finder Batch	Batch type for adding PhoneFinder records.
Pledge Write-off Batch	Batch type for adding Pledge write-off records.
Prospect Research Giving Summary Batch	Prospect Research Giving Summary Batch.
Revenue Update Batch	Batch type for updating revenue records in a batch.
Sponsor Batch	Batch type for adding sponsorship records into a batch.
Stewardship Plan Step Update Batch	Batch type for adding stewardship plan step records.
Timesheet Batch	Batch type for adding timesheet records.
Update Multiple Constituents From MatchFinder Batch	Batch type for updating constituents from the MatchFinder Online service.

Revenue Batch Constituent Security

In revenue batches, you can enable constituent security so that a batch owner cannot add revenue to constituents that the batch owner does not have rights to access. When enabled, an exception occurs when the batch is validated or committed. The batch owner must have access to a constituent in a specific site or in a constituent security group in order to commit the batch and add the revenue.

To enable constituent security, on the Batch Entry page, click **Revenue batch constituent security** under **Configuration**. On the Revenue batch constituent security screen, select **Enable constituent site security checks in revenue batches**.

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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 20](#). 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 189](#).

Note: When your organization integrates with **Blackbaud Internet Solutions**, Microsoft *Outlook*, or *MatchFinder Online*, you can download information from these programs into uncommitted batches. In **Batch entry**, you can manage the batches generated when you download information from another program.

Warning: When your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the **Account system** field appears as an available field in a revenue batch. If you create an account system default in *Administration* and a user does not have rights to post to that account system, when the user adds revenue to the batch, the account system default is set to the first account system created to which the user has rights.

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 20](#).

Note: When you work with constituent or revenue records, you can access the Batch Entry page from *Constituents* or *Revenue*. When your organization integrates with **Blackbaud Internet Solutions**, you can access the Batch Entry page from the Web Transactions page.

Uncommitted Batches

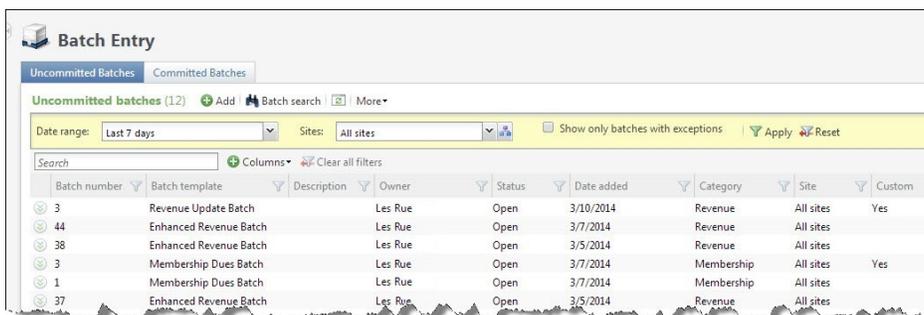
On the Uncommitted Batches tab, you can view and manage your batches that are available for data entry. In the **Uncommitted batches** grid, information about your uncommitted batches appears. This information includes the batch number, template, description, owner, status, date added, and category.

You can see batches that you currently own in the workflow and batches for which you have type and site rights.

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
Errors from validation	7
General errors	7
Import errors	7
Invalid value errors	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 191](#).

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 135](#).

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 85](#).
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 67](#).

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 76](#).
 - 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 67](#).

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.

Warning: You cannot change the batch template selected to create the batch or select to automatically generate a new number for the batch. To select a different batch template for a batch or automatically generate a new batch number, you must create a new batch.

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.

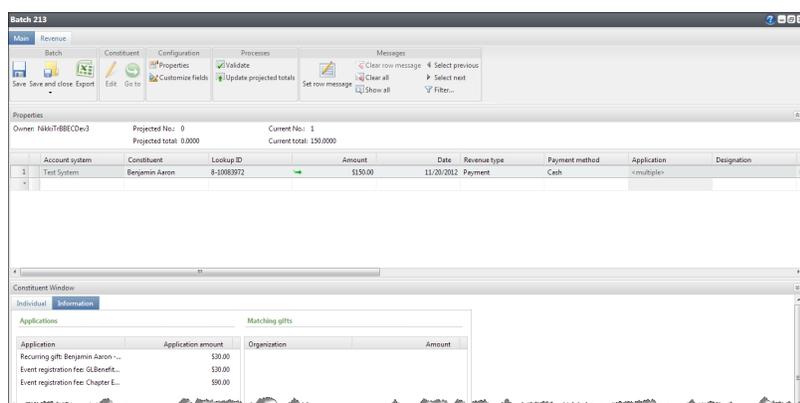
> Enter records in a batch

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

Note: When you use **Blackbaud Internet Solutions**, you can edit web batches from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab on the Web Transactions page.

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 76](#).
 - 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 91](#).

6. When you enter payment records in a revenue batch, the **Constituent Window** pane displays information about the constituent associated with a selected payment.

To view the **Constituent Window** pane, click **Constituent Window** at the bottom of the data entry screen. For information about the **Constituent Window** pane, see [Constituent Window on page 80](#).

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 65](#).

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 128](#).

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 69](#).

> Update a batch to the next workflow status

When you use **Blackbaud Internet Solutions**, you update web batches to the next step in the workflow from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab. For information about web batches, see the *Web Transactions Guide*.

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.

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 141](#).

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 128](#).

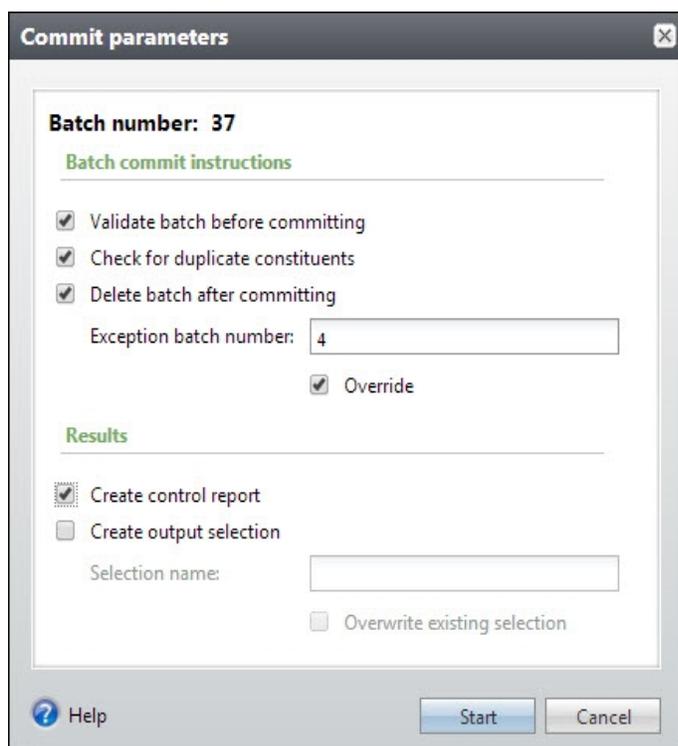
> Commit a batch to your database

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

Note: When you use **Blackbaud Internet Solutions**, you can commit web batches from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab.

3. 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.



4. 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 128](#).

- 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.
5. 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.

Note: When you commit a web sign-up request batch that includes a new user registration that is linked to a constituent who is already a registered **Blackbaud Internet Solutions** website user, the transaction creates an exception. If you select to create an exception batch, you can delete the transaction from your database. From **Blackbaud Internet Solutions**, your organization can send the constituent an email as a reminder with the existing login information.

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 73](#).

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**.

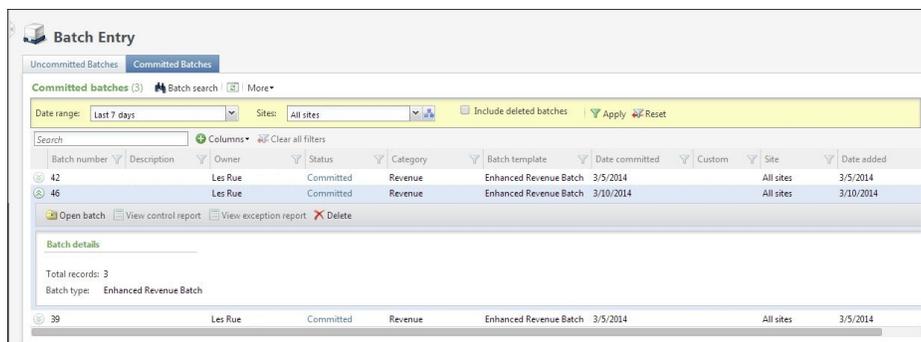
Committed Batches

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 69](#).

You can see batches that you owned at a specific step in the workflow as well as batches for which you have type and site rights.

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.



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 135](#).

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 73](#).

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 190](#).

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 190](#).

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 24](#).

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 20](#).

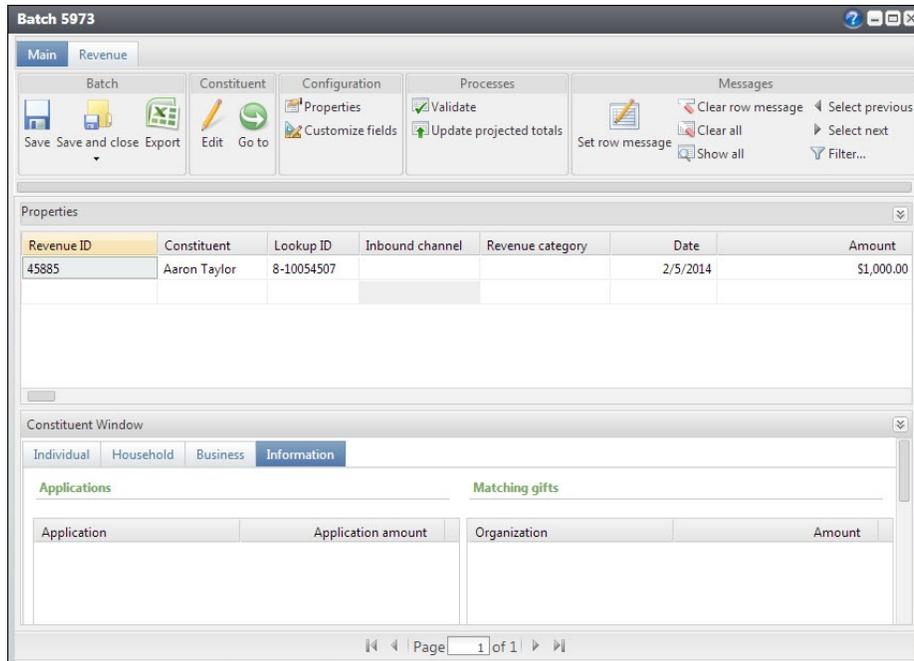
Tip: Several reports are available to help you track the records entered in a batch and correct the exceptions generated when you commit a batch. For more information, see [Batch Entry Reports on page 189](#).

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 116](#).

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.

Note: When your organization integrates with **Blackbaud Internet Solutions**, you can also access the batch data entry screen from the Web Transactions page. On the Transactions tab, select the web batch to edit under **Uncommitted batches**. Click the double arrows next to a batch to expand its row. On the action bar, click **Edit batch**.

- 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 82](#) and [Revenue Batch Data Entry Tasks on page 88](#).
- To move quickly to the first field of the next batch row, click **CTRL ENTER** on your keyboard.
- When your organization integrates with **Blackbaud Internet Solutions**, you can download web transactions from **Blackbaud Internet Solutions** into uncommitted batches. In **Batch entry**, you can manage these batches and view the details of each transaction. For information about how to enter data in a web batch, see [Blackbaud Internet Solutions Integration Batch Data Entry Tasks](#)

[on page 113.](#)

- When your organization integrates with a Microsoft *Exchange* server, you can download calendar items, email messages, and contact record updates from Microsoft *Outlook* into uncommitted batches. For information about how to manage data in an *Exchange* integration batch, see [Microsoft Exchange Integration Batch Data Entry Tasks on page 114.](#)
- When your organization integrates with *MatchFinder Online*, you can download matching gift company information from *Matchfinder Online* into uncommitted batches. For information about how to manage data in a *MatchFinder Online* batch, see [MatchFinder Online Integration Batch Data Entry Tasks on page 115.](#)
- 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 79.](#)

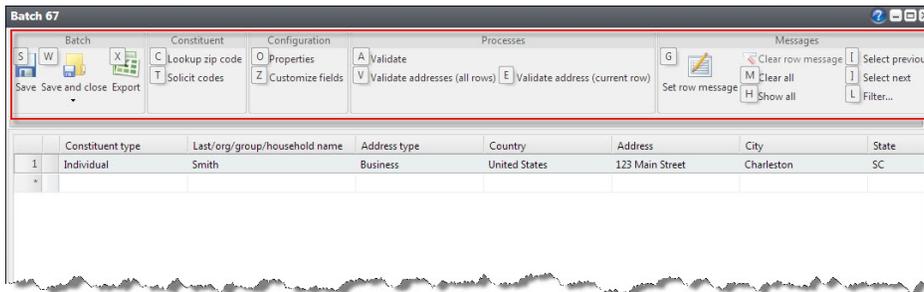
Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), when you enter transactions in a revenue batch, you can enter full credit card numbers for payments, pledges, and recurring gifts. When you enter a credit card number in the batch data entry grid and leave its 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 80.](#)
- When you download email messages from Microsoft *Outlook* into an *Exchange* email batch, the **Message Detail Window** is available. The **Message Detail Window** displays information about the message, such as the content, constituent, and user name associated with the selected message. For information about the Message Detail Window, see [Message Detail Window on page 81.](#)

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

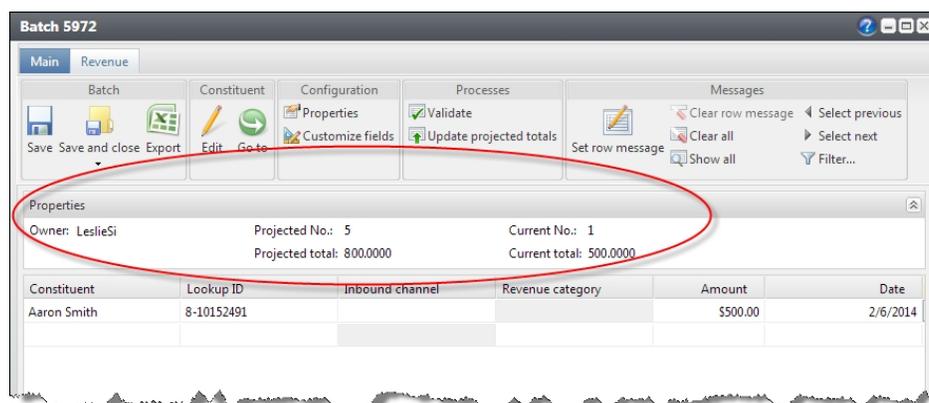
Within the batch data entry grid, you can quickly access information about each record, add and edit records, and attach row comments. The tasks that display on the toolbar depend on the batch type. We recommend you familiarize yourself with the tasks on the toolbars as well as the various shortcut keys.

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**.

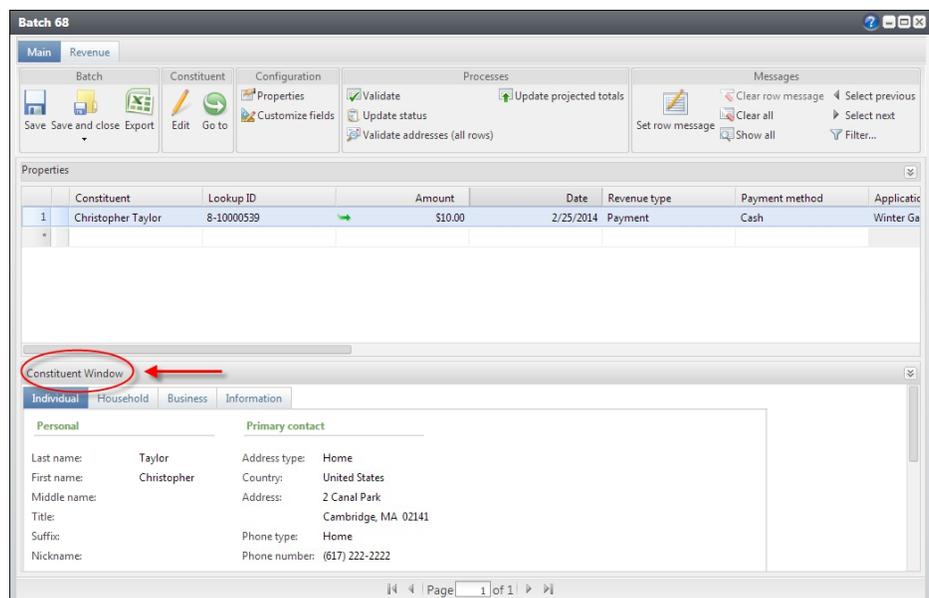
You can also review the properties of the batch, which include the owner, projections, and running totals. You add these properties when you add the batch to the database. The program tracks the current number of contributions entered and automatically updates the current properties of the batch. To 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 81](#)
- [Information on page 81](#)

You can re-size, position, or hide the **Constituent Window** as necessary. To hide the window, click **Constituent Window**.

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.

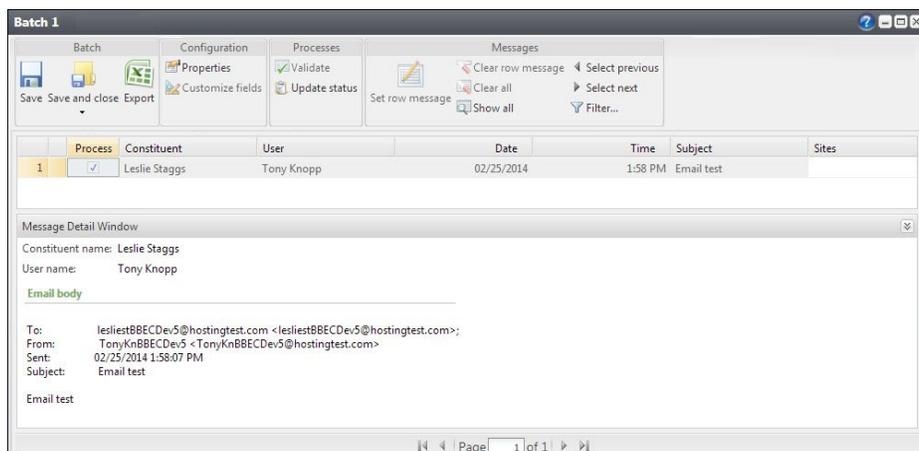
You can edit the constituent record information. For more information, see [Add or Update a Constituent Record in a Revenue Batch on page 112](#).

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.

Message Detail Window

When you download email messages from Microsoft *Outlook*, the program creates an uncommitted Exchange Email Batch on the Batch Entry page. To edit an email update batch, on the Uncommitted Batches tab, click the double arrows beside a batch to expand the row. From the action bar, click **Edit batch**. The batch data entry screen appears.



Note: Depending on the batch workflow associated with the template, you may need to update the batch status to "Ready for review." To do this, click the double arrows beside the batch to expand the row. From the action bar, click **Update status**. The Update batch status screen appears. In the **Next step** field, select "Ready for review," assign an application user, and enter comments as necessary. Click **Save**. You return to the Uncommitted Batches tab.

The batch data entry screen displays the contact records downloaded from *Outlook*. Each row in the grid displays the *Outlook* user who changed the contact record and the constituent in the program. When multiple *Outlook* users modify contact records for a constituent, multiple entries for that constituent appear.

To view the **Message Detail Window**, at the bottom of the grid, click **Message Detail Window**. For each row in the grid, the **Message Detail Window** displays the constituent name, user name, and contents of the email for the selected message.

Tip: To re-size the **Message Detail Window**, click and drag the top of the divider between it and the data entry grid. To hide the window, click **Message Detail Window** again.

For each row you want included in the committal process, select the **Process** column. When you commit the batch, the program updates the corresponding constituent records.

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.

Note: When you delete a transaction from a **Blackbaud Internet Solutions** transaction batch and save the batch, **Blackbaud Internet Solutions** also deletes the transaction from its database.

> 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 85](#).

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 30](#).

> 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.

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.

Note: When your organization configures multiple general ledger account systems and implements site security, the **Account system** field appears as an available field. To ensure transactions post to the same account system, we strongly recommend you select a default account system and hide the **Account system** field. When you do not select a default, the account system assigned to you is used. When a default is not assigned to you, the account system with the earliest creation date to which you have rights is used.

4. Click **Save**. You return to the batch data entry screen.

Look Up a Zip code in a Constituent or Constituent Address Update Batch

With Zip code Lookup, you can search for the Zip code of an area when you enter address information in a constituent or constituent address update batch. When an area has multiple Zip codes, the Zip code Search screen appears so you can select the correct code. When you look up a Zip code, you easily ensure correct data entry.

Note: To enable Zip code Lookup, your system administrator must first configure it in *Administration*. For information about how to configure the Zip code Lookup feature, see the *Administration Guide*.

> Look up a Zip code for an address in constituent information

1. On the batch data entry screen of a Constituent or Constituent Address Update Batch, select the row for which to look up a Zip code. Verify the **ZIP** field of the constituent is blank.
2. In the **City** and **State** fields, enter the applicable address information.
3. On the toolbar, click **Lookup, zip code**.

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.

- When the area entered has only one Zip code, the program automatically enters the correct code in the **ZIP** field of the selected row.
- When the area entered has multiple Zip codes, the Zip code Search screen appears. In the **Results** grid, the Zip codes that match the city and state entered appear. Choose the correct Zip code and click **Select**. You return to the batch data entry screen. In the **ZIP** field, the selected Zip code appears.

Change Constituent in a Revenue Update Batch

In the batch grid, you can edit the constituent that loads with a selected pledge or recurring gift payment (except a sponsorship recurring gift payment). In addition, when you change the constituent, you can reload recognition credits and solicitors by selecting the **Reload recognition credit** and **Reload solicitor** fields that appear in the batch grid.

Note: When you select to reload the recognition credit and solicitor, the reload occurs when you commit the batch.

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.

Note: For information about direct debit rejections from a bank account which uses the "Europe (SEPA)" banking system, see [Direct Debit Rejections and "Europe \(SEPA\)" Banking Systems on page 87](#).

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.

Direct Debit Rejections and "Europe (SEPA)" Banking Systems

If you have a Direct Debit Return file with direct debit payments in euros from a constituent with a bank account which uses the "Europe (SEPA)" banking system, you can match the rejection information

from the bank to the rejected revenue transactions using the **End-to-end ID**. The **End-to-end ID** is available in Direct Debit Return batches for batch entry and import when "Europe (SEPA)" banking system is enabled in **Banking systems** in *Treasury*.

When an import process creates a Direct Debit Return batch with transactions for a "Europe (SEPA)" bank account, the batch attempts to match the direct debit transaction automatically.

- If the **Revenue ID** field is included in the import, it is used to match the transaction first.
- If the **Revenue ID** field is included but can't be matched, or if the field is not included in the import, the **End-to-end ID** field is used.
- If the **End-to-end ID** field is included but can't be matched, or if it is not included in the import, the program uses other fields, such as **Account number** and **Amount**, to match the transaction.

If no match can be made, an error message indicating that revenue is required is displayed on the batch row and a user can manually search for the transaction using the Direct Debit Payment Search screen.

Note: In **End-to-end ID** field on the Direct Debit Payment Search screen, you can enter the first few characters of the ID only and all matches beginning with those characters are returned.

Security for Constituents in Constituent Batch

The **Site** field in Constituent Batch is for the primary constituent in the batch row. If the constituent has group or household members, the site is not applied to those constituent records. Instead, the site security of the user adding the group or household members is applied to the constituent records.

Constituent Security Groups assigned to constituents in Constituent Batch apply to the primary constituent in the batch row, in addition to any group or household members in the row. The Constituent Security Group is not assigned to any organization constituent records, such as the primary business constituent record in the batch row.

Revenue Batch Data Entry Tasks

When you enter data in an enhanced revenue batch or revenue update 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**.

Select a Revenue Record for a Revenue Update Batch

When you enter information for a revenue update batch, in the batch grid, you must identify the revenue record to receive the updates. You can select this through the **Revenue** column that appears in the grid.

Note: Credit card refunds can be processed when you edit or delete transactions individually. Note that the payment processed by the **Blackbaud Payment Service** and the gateway that processed the credit card must support refunds. For more information, see the *Revenue Guide* or the Revenue section of the help file.

➤ Select a revenue record to update in a revenue update batch

1. On the revenue update batch data entry screen, in the data entry grid, click the search button in the **Revenue** column of a transaction. The Revenue Update Batch Search screen appears. For information about how to access a batch, see [Batch Search on page 74](#).

Revenue Update Batch Search

Last/Org/Group name: Taylor Date from: mm/dd/yyyy To: mm/dd/yyyy Search Clear

First name: Transaction type: Payment

Lookup ID: Revenue type:

Receipt number: Payment method:

Revenue ID:

Match all criteria exactly

Advanced search options

Search in: Individuals Organizations Groups/Households

Check nickname Include deceased

Check aliases Check alternate lookup IDs

Include inactive

Results (More than 100 records found; only the first 100 rows are shown)

Sort constituent name	Lookup ID	Name	Transaction type	Amount	Payment method	Date	Revenue type	Details
Taylor, Aaron	8-10035303	Aaron Ta...	Payment	\$327.00	Gift-in-kind	2/1/2...	Gift	Don
Taylor, Anette	8-10038658	Anette Ta...	Payment	\$46.00	Stock	7/24/...	Gift	Don

Help Select Cancel

2. In the **Last/Org/Group name** field, enter search criteria.

To search for revenue from an individual constituent, enter the constituent's last name. To search for revenue from an organization constituent, enter the organization's name. To search for

revenue from a constituent group or household, enter the name of the group or household. When uncertain of the spelling, enter the first few characters or letters.

3. In the **First name** field, enter the constituent's first name to search for revenue from an individual constituent.
4. In the **Lookup ID** field, enter the constituent's lookup ID to search for revenue from a constituent.
5. You can search for revenue that has already been receipted. In the **Receipt number** field, enter the receipt number.

The program generates receipt numbers automatically when you run a receipt process and stores the receipt number on the revenue record.

6. In the **Revenue ID** field, enter a known revenue ID number.
7. To display only results that match the search criteria entered exactly, select **Match all criteria exactly**.

When you select this, a revenue record does not appear in the **Results** grid when it does not match the criteria exactly.

8. Use the calendar in the **Date from** and **To** fields to search for revenue by the date it was entered in your database.
9. In the **Transaction type** field, search for revenue by the transaction type. Select the desired type such as Payment, Pledge, or Recurring gift.
10. In the **Revenue type** field, select the type of revenue generated by the transaction.
11. In the **Payment method** field, search for revenue by the constituent's method of payment, such as Cash or Credit card.
12. To access more detailed search options, click **Show advanced search options**. The following options appear:

- **Search in** - Select the types of constituents to include when you search for revenue.
- **Check nickname** - Search nicknames to find revenue from a constituent. For example, when you enter a **First name** of "Charlie" and select this checkbox, revenue from constituents with a first name or nickname of Charlie appear in the **Results** grid.
- **Check aliases** - Search aliases to find revenue from a constituent. For example, when you enter a **First name** of "Charlie" and select this checkbox, revenue from constituents with a first name or an alias of Charlie appear in the **Results** grid.
- **Include inactive** - Include inactive constituents when you search for revenue. When you select this checkbox, revenue from inactive constituents that match the criteria entered appear in the **Results** grid.
- **Include deceased** - Include deceased constituents when you search for revenue. When you select this checkbox, revenue from deceased constituents that match the criteria entered appear

in the **Results** grid.

- **Check alternate lookup IDs** - Include alternate lookup IDs for constituents when you search for revenue. When you select this checkbox, revenue from constituents with alternate lookup IDs that match the criteria entered in the **Lookup ID** field appear in the **Results** grid.

13. Click **Search**. All results matching your criteria display in the **Results** grid.

When more than 100 records match the criteria entered, only the first 100 records appear.

14. Choose the revenue record you want to update and click **Select**.

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 74](#).
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.

On the Apply to commitments screen in an enhanced revenue batch, the program displays all commitments regardless of their association with the account system you select for a batch row. An account system not associated with a commitment still appears, but is disabled.

Application	Constituent	Description	Balance	Date due	Amount due	Applied amount	Applied percent	Overpaym
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	

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.

To automatically apply the payment amount to the commitments listed, click **Auto apply** on the action bar. The program automatically applies the payment amount to the amount due of the commitments, starting with the first commitment in the grid, until the total payment amount is applied to commitments. You can adjust the automatic application of the payment amount as necessary.

- 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 74](#).
2. From the Revenue tab toolbar, click **Edit installments**. The Installment schedule screen for the selected transaction 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.

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

- Review the date and amount of the selected contribution. If required, adjust the installment schedule for the contribution.
- The **Pledge date** or **Recurring gift date** field displays the date entered in the **Date** field on the data entry screen.
- The **Pledge amount** or **Recurring gift amount** field displays the value entered in the **Amount** field on the data entry screen.
- 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.
- 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.
- 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.
- 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.

10. 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.
11. 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.
12. 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.
13. In the grid, the **Receipt amount** displays the total receipt amount for each payment.
14. 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 74](#).
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 91](#).

> 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 74](#).
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**.
6. 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

1. 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 74](#).
2. 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 in the top right corner. The window content is as follows:

- Header: **Payment for Aaron Taylor**
- Type: (dropdown arrow)
- Date: (calendar icon)
- Title:
- Author: (search icon)
- Notes:
- Bottom left: Help
- Bottom right:

Note: In an Enhanced Revenue Batch, you can add only one note. In a Revenue Update Batch, you can add multiple notes.

3. 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.

4. In the **Date** field, enter the date you add the note. You can also select from a calendar.
5. In the **Title** field, enter a description to help identify the note, such as "Donor Preferences."
6. In the **Author** field, search for the author of the note.
7. 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.

Note: In a Revenue Update Batch, you can add and edit multiple notes.

> 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 74](#).
2. From the Revenue tab toolbar, click **Edit note**. The Edit note screen appears.

Note: In a Revenue Update Batch, when multiple notes exist for a transaction, the Notes screen appears and lists all notes. From this screen, select the note to edit and click **Edit** on the action bar. You can also delete a note and add a new note from this screen.

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 74](#).
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 91](#).

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 74](#).
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	Employee	\$100.00	5/8/2014	CAMPEXCL

Matching gift condition summary

Matching factor: 1.00
 Min match per gift: \$10.00
 Max match per gift: \$1,000.00
 Notes: Will match only for full-time employees.

Relationship types:
 Revenue type: Gift
 Matching amount: Tax deductible portion only

- In the **Matching organization** field, search for and select the organization constituent that matches donations from the constituent.
- 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.

- 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.
- 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.

- 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.
- 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.
- 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 98](#).
- Click **OK**. You return to the batch data entry screen.

Specify Tributes for a Payment in a Revenue Batch

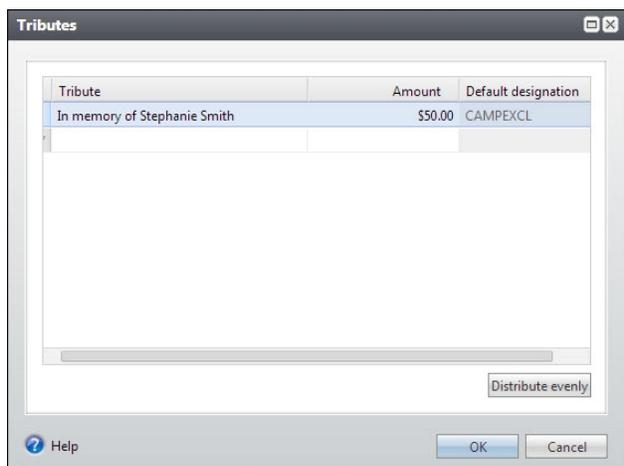
You can track detailed information about revenue given in honor, memory, or celebration of an individual or organization. When you enter transactions in a revenue batch, you can designate revenue to specific tributes. For example, your organization sets up a tribute for a constituent. When you receive 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 74](#).
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.



3. 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.

4. 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**.

5. 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.

6. 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 74](#).
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.

Constituent	Amount	Recognition credit type	Effective date
Gita Daniels	\$294.00		1/5/2008
*			

- The **Total amount** field displays the amount of the payment available to apply as recognition credit.
- 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.

- 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.
- 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."
 - 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 74](#).
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.

The screenshot shows a window titled "Solicitors" with a subtitle "Payment for John T. Smith". The total amount is \$500.00. A table lists two solicitors: Patricia Payne and Cynthia Davis, each with a credit amount of \$250.00. There is a "Reset solicitors" button and a "Distribute" dropdown menu. The window also includes a "Help" icon and "OK" and "Cancel" buttons.

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

- 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 Acknowledgement Letters to Revenue in a Revenue Update Batch

In a Revenue Update Batch, for each batch entry, you can determine which constituents should receive an acknowledgement letter. The program automatically tracks information about these letters on the Letters tab of the revenue record.

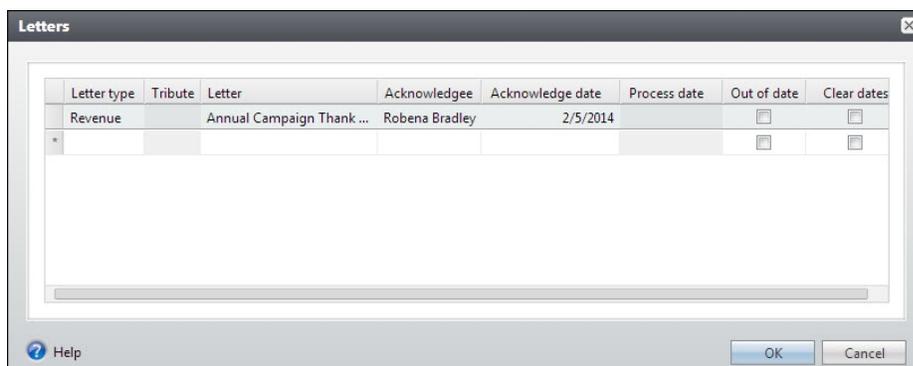
Note: You cannot work with acknowledgement letters through an Enhanced Revenue Batch.

For more information about acknowledgement letters for revenue, see the *Revenue Guide*.

➤ Add an acknowledgement letter to a transaction in a revenue update batch

1. On the revenue update batch data entry screen, in the data entry grid, select the transaction to associate an acknowledgement letter. For information about how to access a batch, see [Batch Search on page 74](#).
2. From the Revenue tab toolbar, click **Letters**. The Letters 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.



3. In the **Letter type** field, select to send a revenue or tribute acknowledgement letter to a constituent.
4. When the type you selected in the **Letter type** field is "Tribute," the **Tribute** field is enabled. In this field, select the tribute you want to acknowledge.
5. In the **Letter** field, select the letter to send to the constituent. The options that appear are the letters available in the Acknowledgements area of *Marketing and Communications*.
6. In the **Acknowledgee** field, enter or search for the constituent to receive the letter.
7. In the **Acknowledge date** field, enter the date you plan to mail the letter to the constituent.
8. When you run an acknowledgement process to generate a letter, the letter has a process date — the date on which you run the process. Since you manually add letters to revenue in a batch, there is no process date and the **Process date** field is disabled.
9. For revenue letters, select **Out of date** when you want to generate a new acknowledgement for the selected revenue.

Acknowledgement processes use the process date and acknowledgement date to determine whether the process can be run again for the selected acknowledgement. When you mark a letter as out of date, you can generate a new acknowledgement for the selected revenue. For example, when there is a misspelling in the first acknowledgement letter, and you select **Out of date**, you can send the constituent a corrected version of the letter.

10. Select **Clear dates** to clear the process date and acknowledge date associated with a previous process.

When you want to include the revenue in another acknowledgement process, you must remove the process and acknowledgment date associated with the letter.

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

Specify Business Units for a Transaction in an Enhanced Revenue Batch

When your organization receives a pledge for recurring gift designated for specific business units, such as Donation or Direct Marketing, you can view the business units associated with the transaction in your revenue batch. When necessary, you can also edit the business unit currently associated with the transaction.

Tip: You can set up business units on an appeal record. For more information, see the *Communications Guide*.

> View and edit business units associated with a transaction in a revenue batch

1. On the revenue batch data entry screen, in the data entry grid, select the transaction to view or edit business unit information. For information about how to access a batch, see [Batch Search on page 74](#).

- From the Revenue tab toolbar, click **Business units**. The Business units screen appears.

The screen displays the total amount of the transaction. In the grid, you can view existing applications associated with the transaction.

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.

- To edit an application, select the application you want to change and click **Edit** on the action bar. The Business units screen appears.

Business units

Donation - LIBRARY

Total amount: \$381.00

Override business units

Reason for override: Correction

Business unit	Amount
Annual Programs	\$190.50
Special Events	\$190.50
*	

Distribute

Help OK Cancel

- Select **Override business units** to enable the grid.
- In the **Reason for override** field, select the reason for the business unit change.

Tip: Reasons to override business units are created in **Code Tables** in *Administration*. On the Code Tables page, under **Revenue**, click **Revenue Split Business Unit Override Reason**.

- In the **Business unit** column select the units you want credited for the revenue.

7. In the **Amount** column, enter the specific amounts to be credited to the corresponding business units. You can also click **Distribute** and select either **Evenly** to divide the amount evenly between all units or **Full amount to all** to give each unit full credit for the revenue.
8. Click **OK**. You return to the Business units screen.
9. 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 74](#).
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 74](#).
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.

3. 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.

Blackbaud Internet Solutions Integration Batch Data Entry Tasks

When your organization integrates with **Blackbaud Internet Solutions**, you can download web transactions, such as event registrations, from **Blackbaud Internet Solutions** into uncommitted batches. You can then manage these batches and view details of each transaction.

You can also assign the constituent information downloaded with a transaction to a security group. When you assign constituent information to a security group, only users in that group can access and manage the constituent records created with the transaction information.

Blackbaud Internet Solutions Web Transaction Batch Types

When you download web transactions from your **Blackbaud Internet Solutions** (BBIS) website, they download into uncommitted batches. From an uncommitted batch, you can view details about the data in the transactions. When you view details, you can select the information to use to create or update records in your database.

Several types of batch templates are used with web transactions. Batch templates define basic information about the batch, such as the fields to include and default values. The program includes default **Blackbaud Internet Solutions** batch templates for profile updates and event registrations. You must create batch templates for donations, event registrations, and memberships.

- Website user signups use batch templates with the Constituent Update Batch batch type.
- Donations use batch templates with the Enhanced Revenue Batch batch type.
- Profile updates use batch templates with the BBIS Profile Update Transaction Batch batch type.
- Event registrations use batch templates with the BBIS Event Registration Transaction Batch batch type.
- Memberships use batch templates with the Membership Dues Batch batch type.

Except for fundraiser transactions, you can also assign constituent information included in a downloaded **Blackbaud Internet Solutions** transaction to a specific security group.

For more information about downloading web transactions from **Blackbaud Internet Solutions**, see the *Web Transactions Guide*.

Assign Constituent Information in a Blackbaud Internet Solutions Web Transaction to a Security Group

When you download web transactions from **Blackbaud Internet Solutions** (BBIS), they download into uncommitted batches. From a web transaction batch, you can assign the constituent information downloaded with a transaction to a security group. When you assign constituent information to a security group, only users in that group can access and manage the constituent records created with the transaction information. To assign constituent information in a transaction to a security group, select the transaction on the batch data entry screen and click **Set up security** on the toolbar. The Set up security for created constituents screen appears.



Set up security for created constituents

Donor

Security group:

Site:

Guests

Security group:

Site:

Help OK Cancel

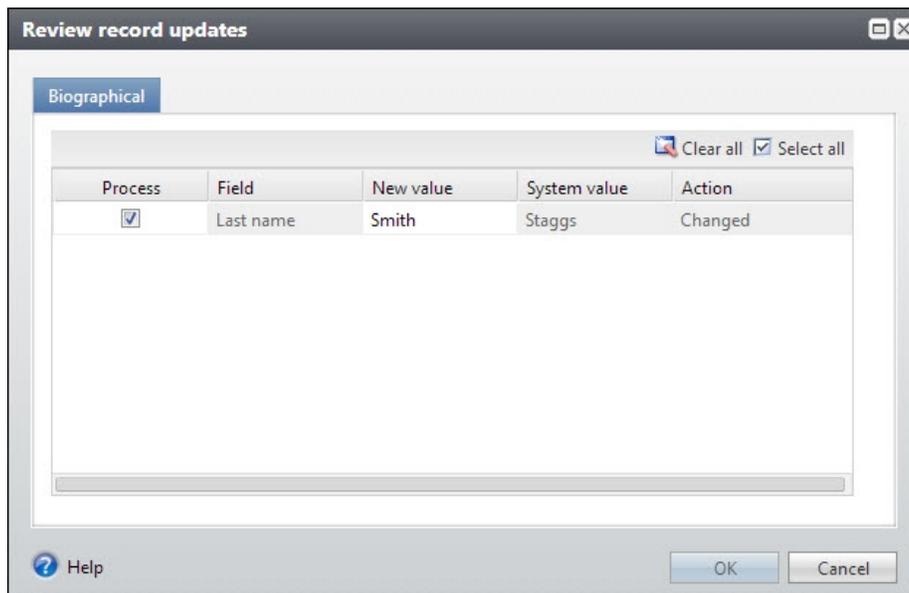
Microsoft Exchange Integration Batch Data Entry Tasks

With Microsoft *Exchange* server integration, you can download calendar items, email messages, and contact record updates from Microsoft *Outlook*. When you download updates from Microsoft *Outlook*, you can select the items to commit to your database. When you download contact record updates, you can also view the details of each update and select which information to commit to your database. For information about how to view the details of a downloaded contact record update, see [View the Details of a Microsoft Outlook Contact Record Update on page 114](#).

Note: For information about how to download information from Microsoft *Outlook*, see the *Exchange Integration Guide*.

View the Details of a Microsoft Outlook Contact Record Update

When you download contact record updates from Microsoft *Outlook*, they download into uncommitted batches. From an *Exchange* contact update batch, you can view details about the contact record updates. When you view the record update details, you can select the information to use to update records in your database. To view the details of a contact record update, select the update on the batch data entry screen and click **Review record updates** on the toolbar. The Review record updates screen appears and displays the new or changed information downloaded from Microsoft *Outlook*. The tabs that appear depend on the fields updated in *Outlook*.



For more information about Microsoft *Outlook* contact record updates, see the *Exchange Integration Guide*.

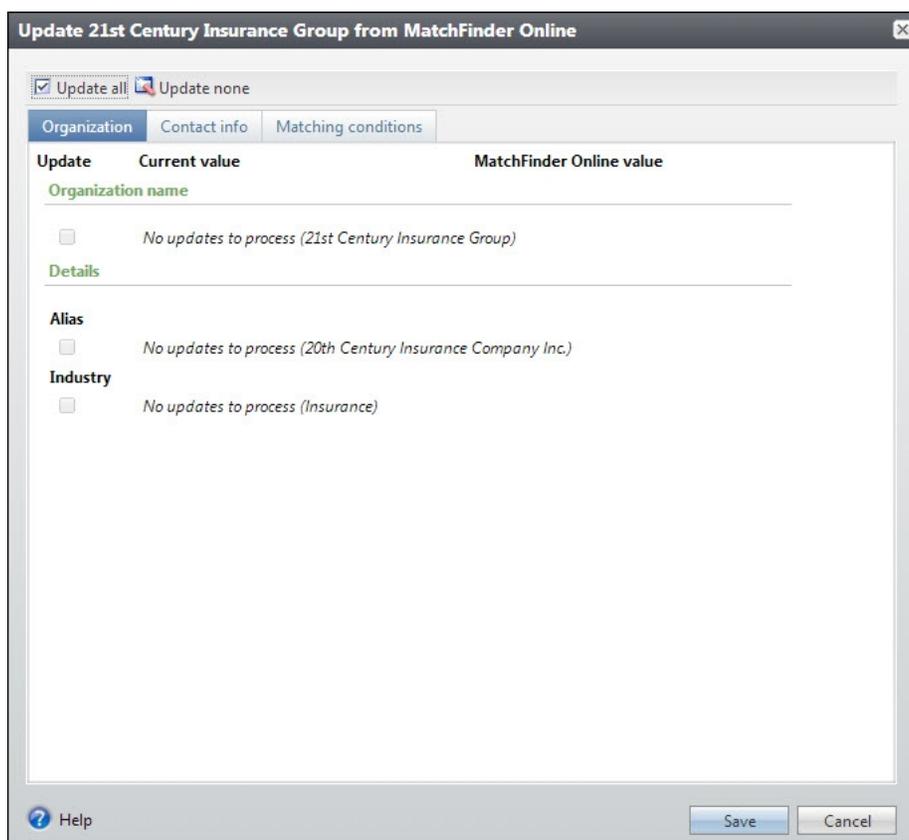
MatchFinder Online Integration Batch Data Entry Tasks

From the *MatchFinder Online* database, you can download matching gift company information for organization constituents not currently linked to a *MatchFinder Online* record. When you download organization constituent updates from *MatchFinder Online*, you can view the details of each update and select which information to commit to your database. For information about how to view the details of a downloaded organization constituent update, see [View the Details of a MatchFinder Online Organization Constituent Update on page 115](#).

Note: For information about how to download information from *MatchFinder Online*, see the MatchFinder Online chapter of the *Revenue Guide*.

View the Details of a MatchFinder Online Organization Constituent Update

When you download information about organization constituents from the *MatchFinder Online* database, they download into uncommitted batches. From a *MatchFinder Online* batch, you can view details about the *MatchFinder Online* information and select which information to update on the organization constituent record. To view the details of *MatchFinder Online* information, select the constituent on the batch data entry screen and click **Show details** on the toolbar. The Update constituent screen appears.

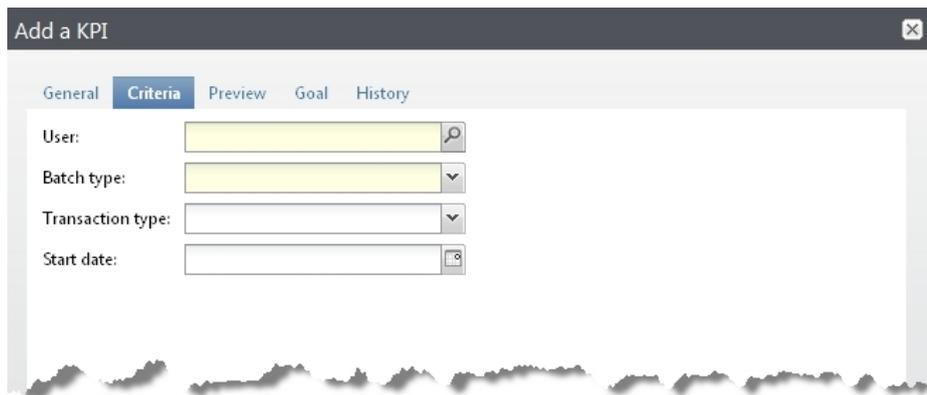


When you view *MatchFinder Online* details, you can also specify which information to use to link to and update the organization constituent in your database.

For more information about how to review detail information in a *MatchFinder Online* batch, see the *MatchFinder Online* chapter of the *Revenue Guide*.

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.



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

Generate Revenue Update Batch

You can use the Generate revenue update batch process to make revenue changes to multiple transactions at one time. A regular update batch requires manual entry of each individual transaction you want to change, whereas an update batch created from the Generate revenue update batch process allows you to populate the revenue update batch with a selection of revenue transactions.

You access the **Generate revenue update batch** task from main Revenue page.

Add a Generate Revenue Update Batch Process

To create a revenue update batch from the Generate revenue update batch process, you must first create the business process. You create and manage Generate revenue update batch processes from the Generate Revenue Update Batch page. From this page, you can add, edit, mark as active or inactive, and start your Generate revenue update batch processes.

Depending on your security rights and system role, you can also delete processes from this page.

To access the Generate Revenue Update Batch page, click **Generate revenue update batch** under **Processing** on the Revenue page.

> Add a generate revenue update batch process

1. From the Revenue page, click **Generate revenue update batch** under **Processing**. The Generate Revenue Update Batch page appears.



- Click **Add** on the action bar. The Generate revenue update batch screen appears.

- In the **Name** field, enter a unique name for the batch.
- In the **Batch template** field, select the template for this batch.
The batch template defines the fields and any default values used in the batch. Your choices include any templates associated the Revenue Update Batch type.
Typically, a batch processing manager creates the batch template. When the batch template you want does not appear, consult your batch processing manager. For information about how to add a batch template, see [Configure Batch Templates on page 29](#).
- In the **Batch number** field, enter a unique number to identify the batch. After you save a batch, you can no longer use its number to identify a new batch. 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.

When "Auto-generated" is selected during the creation of the batch 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. To manually enter a new number, select **Override**.

- 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.

Tip: You can enter up to 255 characters in this field.

- 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 67](#).

8. Select **Enable auto-save** to automatically save each row as you work in the batch.
9. 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.
10. 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.
11. In the **Revenue selection** field, enter the selection that contains transaction records you want to update. You can use Selection Search to locate an existing selection, or to add a new selection. When the selection is created from an ad-hoc query or a smart query instance, you can also edit the query used to generate the selection.
12. Select **Filter selection and overwrite with new value** to globally change the same field on the transaction records to a new value, and you want the value to be the same. When you select this option, the selection is filtered to include only the items with the current value. Do not select this when you edit a variety of fields with different values. When you select this option, the following fields are enabled:
 - In the **Filter by** field, select the field you want to change. Your choices include "Appeal," "Campaign," "Date," "Designation," and "Solicitor."
 - In the **Current value** field, enter or search for the current value of the field you want to change.
 - In the **Overwrite with** field, enter or search for the new value to overwrite the existing value.

Warning: The **Generate revenue update batch** process does not support adding default values for fields, such as revenue attributes, to multiple recurring gifts.
13. Under **Adjustment details**, select **Include posted transactions** when the records you are updating include transactions that have already posted. Do not select this when you make changes to records that have not yet posted. When you select this option, the following fields are enabled:

- In the **Adjustment date** field, enter the date to associate with the adjustment to the posted transaction. When you leave this field blank, it defaults to the date you run the process.
 - In the **Adjustment post date** field, enter the date you want the adjustment to post. When you leave this field blank, it defaults to the date you run the process.
 - In the **Adjustment post status** field, select "Not posted" or "Do not post" as the post status for the adjustment.
 - In the **Adjustment reason** field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file or the *Administration Guide*.
 - In the **Adjustment details** field, enter any additional information about the adjustment.
14. Click **Save** to save the process and return to the Generate Revenue Update Batch page. The new process appears in the grid. For information on running a Generate revenue update batch process, see [Start a Generate Revenue Update Batch Process on page 120](#).

Start a Generate Revenue Update Batch Process

When you start and run a Generate revenue update batch process, the program uses the data in the batch to automatically update records in the database. On the Batch Entry page, you can view the batches the process commits on the Committed Batches tab.

➤ Start a Generate revenue update batch commit process

1. To start a Generate revenue update batch process, click **Generate revenue update batch in Revenue**. The Generate Revenue Update Batch page appears.
2. In the **Generate revenue update batch processes** grid, click the double arrows next to a process to expand its row. On the action bar, click **Start process**. The Run generate revenue update batch process screen appears.

Note: You can also start a Generate revenue update batch process from its parameters page. From the explorer bar, click **Start process** under **Tasks**.

The screenshot shows a dialog box titled "Run generate revenue update batch process". It contains the following fields and options:

- Process name:** Update Designation
- Batch number:** <Next available batch number> (with an "Override" checkbox)
- Revenue selection:** All Gifts (with a search icon)
- Filter by:** Designation (dropdown menu)
- Current value:** CAMP (with a search icon)
- Overwrite with:** ANNUAL (with a search icon)
- Include posted transactions:** (checked checkbox)
- Adjustment date:** 2/6/2014 (calendar icon)
- Adjustment reason:** Correction (dropdown menu)
- Adjustment post date:** 2/6/2014 (calendar icon)
- Adjustment details:** (empty text box)
- Adjustment post status:** Not posted (dropdown menu)

At the bottom left is a "Help" icon, and at the bottom right are "Start" and "Cancel" buttons.

3. The **Process name** field displays the name of the Generate revenue update batch process. You enter this information when you add the process to the database.
4. 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.

When "Auto-generated" is selected during the creation of the batch 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. To manually enter a new number, select **Override**.

5. In the **Revenue selection** field, verify the selection contains transaction records you want to update.
6. Select **Filter selection and overwrite with new value** to globally change the same field on the transaction records to a new value, and you want the value to be the same. When you select this option, the selection is filtered to include only the items with the current value. Do not select this when you edit a variety of fields with different values. When you select this option, the following fields are enabled:
 - In the **Filter by** field, select the field you want to change. Your choices include "Appeal," "Campaign," "Date," "Designation," and "Solicitor."
 - In the **Current value** field, enter or search for the current value of the field you want to change.
 - In the **Overwrite with** field, enter or search for the new value to overwrite the existing value.
7. Select **Include posted transactions** when the records you are updating include transactions that have already posted. Do not select this when you make changes to records that have not yet posted. When you select this option, the following fields are enabled:
 - In the **Adjustment date** field, enter the date to associate with the adjustment to the posted transaction. When you leave this field blank, it defaults to the date you run the process.
 - In the **Adjustment post date** field, enter the date you want the adjustment to post. When you leave this field blank, it defaults to the date you run the process.
 - In the **Adjustment post status** field, select "Not posted" or "Do not post" as the post status for the adjustment.
 - In the **Adjustment reason** field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file or the *Administration Guide*.
 - In the **Adjustment details** field, enter any additional information about the adjustment.

Note: When you are update a transaction that has an existing unposted adjustment, the new update batch does not overwrite any of the adjustment fields that already exist.

8. Click **Start**. The program runs the process. When the process is complete, its parameters page appears.

Mark Generate Revenue Update Batch Process Inactive or Active

Rather than delete a Generate revenue update batch process from the database, you can mark it inactive. When inactive, the process is disabled and can no longer be used.

You can mark a process inactive from the Generate Revenue Update Batch page in *Revenue*. In the **Generate revenue update batch processes** grid, click the double arrows next to a process to expand its row. On the action bar, click **Mark inactive**.

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

Alternatively, you can mark a process as active to ensure it can be used by your organization. To do this, from the same action bar, click **Mark active**.

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: Minutes 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 185](#).
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
Job name	Enter a name for the job schedule.
Schedule type	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> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	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.
Daily frequency	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 Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as

Screen Item Description

	well as a start time and end time.
Start date	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 .

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.

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 85](#).

> 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 129](#).

> 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

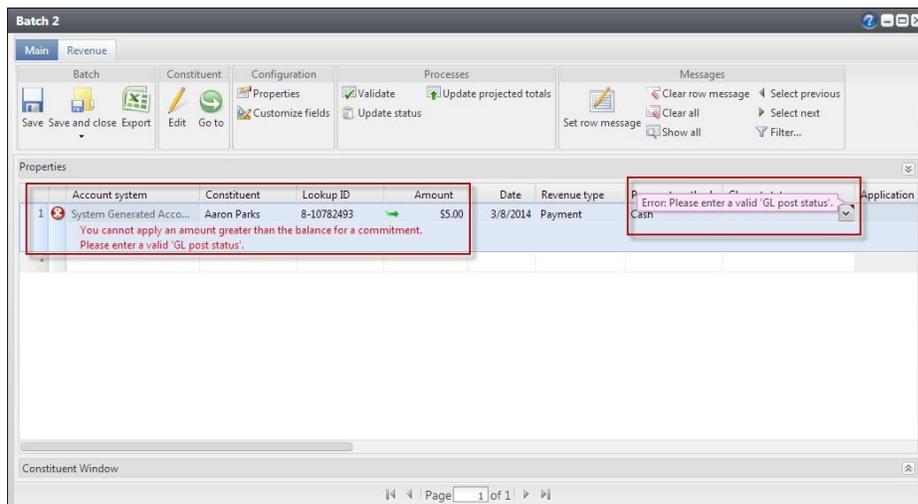
1. On the batch data entry screen, click **Validate** from the toolbar. The program automatically searches the data entry for exceptions.

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 129](#).

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 134](#).

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.

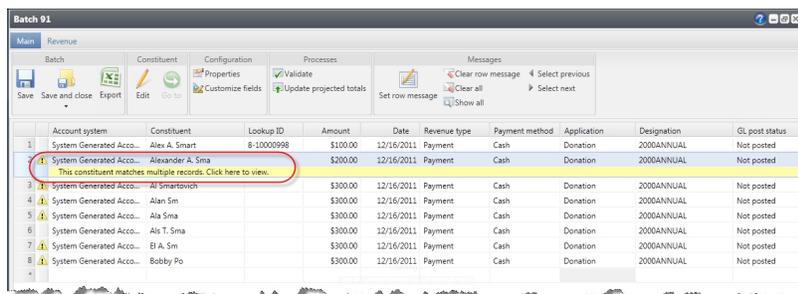
> Resolve duplicates in a Constituent Update or Enhanced Revenue batch

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, Revenue Update, and Sponsor batches. For more information about the Duplicate record check screen, see [Resolve duplicate constituents in Constituent, Membership Dues, Revenue Update, and Sponsor batches on page 132](#).

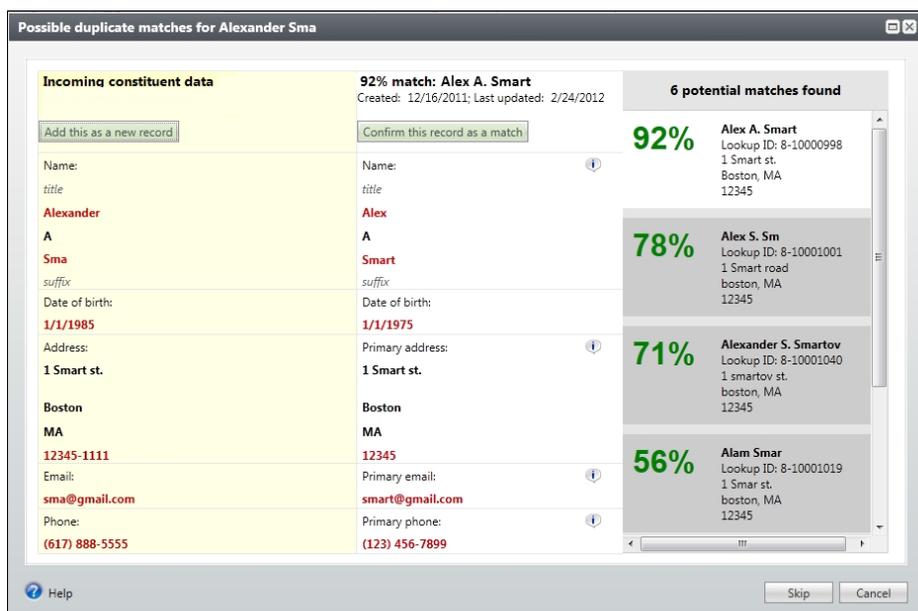
1. From a validated batch that contains exceptions, find a row in the grid with a yellow caution symbol. Click the symbol and a duplicate records message appears under the row.

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 the *Duplicate Constituents and Merge Tasks Guide*.



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



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 set on the Global data entry page of *Administration*, click **Use my organization's rules**. For example, when you have **Add incoming phone number as new phone number** set as a rule, and you click **Use my organization's rules**, the program automatically adds the incoming phone number to the existing record. When your update rules require manual review for certain fields, you must review those incoming fields and manually select which action to take. As a reference, your organization's selected update rules appear in the **Tips** column. For information about constituent update rules, see the *Duplicate Constituents and Merge Tasks Guide*.
 - 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.

- d. To discard the incoming value (neither add a new value nor update the existing value), click **Ignore**.
- e. 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 record, 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, Revenue Update, and Sponsor 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, Revenue Update, and Sponsor 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.

% Match	Name	Address	City	State	ZIP/Postal Code	Lookup ID
97.63	Robert C. Hernandez	410 17th St	Denver	CO	80202-4402	96
86.53	Wendy Hemandez	410 17th St	Denver	CO	80202-4402	8-10000207

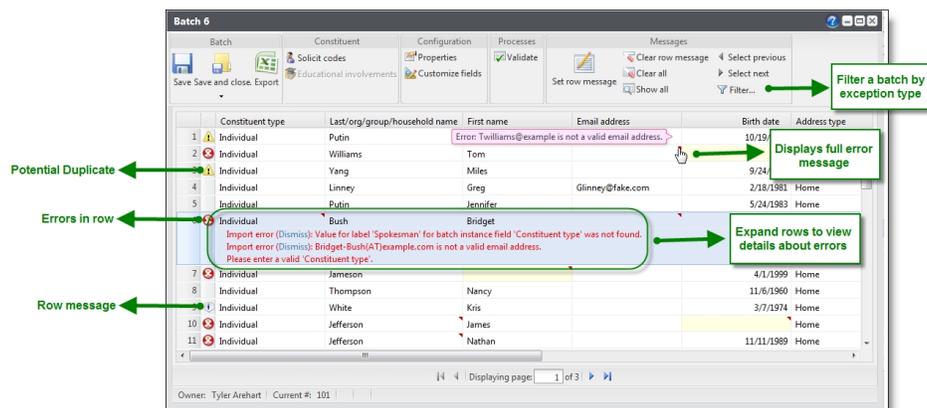
Warning: The Possible duplicate matches screen will not appear if you turn off matching via the **Enable/disable matching** configuration task in *Administration*.

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 129](#)

Note: When you download tribute acknowledge, corporate, and matching gifts from **Blackbaud Internet Solutions**, the program alerts you about revenue notes in the Enhanced Revenue Batch. The same yellow caution symbol appears next to the row along with a message that a note exists. You can view the note or you can commit the batch successfully without clearing the batch message.

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 135](#).

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 190](#)

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.

Validate Addresses in a Batch

With *Address Validation*, you can verify the address information entered in a Constituent Batch, Constituent Update Batch, Constituent Address Update Batch, Revenue Batch, or Enhanced Revenue Batch is correct. Address validation verifies the addresses you enter exist and are entered correctly. When you validate an address, the program updates missing or incomplete information such as Zip codes, standardizes street addresses, and updates the addresses with Coding Accuracy Support System (CASS) certified information.

In Constituent Batch, Constituent Update Batch, and Constituent Address Update Batch, when you use **Validate addresses (all rows)**, the address validation happens for all constituent addresses added or edited in the batch. In Enhanced Revenue Batch, when you use **Validate addresses (all rows)**, the address validation happens for new constituents added to the batch only. If you edit an existing constituent's address in the batch, you must use the **Validate** button on the Edit constituent screen.

Note: Address Validation provides CASS certification through Satori Software, Inc., an official CASS certification agent. To enable *Address Validation*, your system administrator must first configure it in *Data Tune-Up*. For information about how to configure *Address Validation*, see the *Data Tune-up Guide*.

> Validate an address in the current row

1. For constituent batches, select the row with the address to validate on the batch data entry screen. Verify the address fields contain information to validate, and click **Validate address (current row)** on the toolbar. The program validates the address to make sure it is correct and contains complete information.

In Constituent Batch, Constituent Update Batch, and Constituent Address Update Batch, when you use **Validate addresses (all rows)**, the address validation happens for all constituent addresses added or edited in the batch. In Enhanced Revenue Batch, when you use **Validate addresses (all rows)**, the address validation happens for new constituents added to the batch only. If you edit an existing constituent's address in the batch, you must use the **Validate** button on the Edit constituent screen.

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 address can be validated, the program standardizes the address, corrects any misspelled words, and updates it with missing information, such as the ZIP+4 code.

When the selected address cannot be validated, a yellow caution symbol appears next to the row. Click the symbol and an address validation error message appears under the row. For example, when you enter an incorrect address that contains multiple possible matches, an error message displays.

- a. To search for and update the address with valid information, click the error message to display an Address Validation screen.

Address validation

Address:

City:

State:

ZIP:

Results

Select a street:

Primary range	Unit type	Secondary range	ZIP+4	Business name	Address type
1			29407-7300		Building/Apartment
1 - 99 (odd)			29407-7303		Street
1	Ste	A - D	29407-7300		Building/Apartment
2 - 98 (even)			29407-7304		Street

- b. At the top of the screen, the address information entered on the batch data entry screen appears. Verify the address fields are complete.
- c. Click **Search**. Under **Results**, information about the possible addresses that match the entered criteria appear.
- d. In the **Select a street** box, the possible street names that match the entered criteria appear. If the results return multiple street names, such as if the address entered is misspelled, select the street name you think is correct.
- e. In the **Address ranges for selected** grid, the address ranges for the selected street appear. Use this information to find or determine the correct street address. At the top of the screen, update the **Address** field as necessary.
- f. Click **Validate**. The program validates the updated address information. If the address is valid, the program standardizes it and updates it with any missing information. You return to the batch data entry screen.

➤ Validate addresses in all rows

1. For a Constituent Batch, Constituent Address Update Batch, Constituent Update Batch, or Enhanced Revenue Batch, verify the address fields contain information to validate and click **Validate addresses (all rows)** on the toolbar. The program validates the addresses to make sure they are correct and contain complete information.

In Constituent Batch, Constituent Update Batch, and Constituent Address Update Batch, when you use **Validate addresses (all rows)**, the address validation happens for all constituent addresses added or edited in the batch. In Enhanced Revenue Batch, when you use **Validate addresses (all rows)**, the address validation happens for new constituents added to the batch only. If you edit

an existing constituent's address in the batch, you must use the **Validate** button on the Edit constituent screen.

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 addresses can be validated, the program standardizes the addresses, corrects any misspelled words, and updates them with missing information, such as the ZIP+4 code.

When addresses cannot be validated, a yellow caution symbol appears next to the row. Click the symbol and an address validation error message appears under the row. For example, when you enter an incorrect address that contains multiple possible matches, an error message displays.

- a. To search for and update the address with valid information, click the error message to display an Address Validation screen.

Address validation

Address:

City:

State:

ZIP:

Results

Select a street:

Address ranges for selected:

Primary range	Unit type	Secondary range	ZIP+4	Business name	Address type
1			29407-7300		Building/Apartment
1 - 99 (odd)			29407-7303		Street
1	Ste	A - D	29407-7300		Building/Apartment
2 - 98 (even)			29407-7304		Street

- b. At the top of the screen, the address information entered on the batch data entry screen appears. Verify the address fields are complete.
- c. Click **Search**. Under **Results**, information about the possible addresses that match the entered criteria appear.
- d. In the **Select a street** box, the possible street names that match the entered criteria appear. When the results return multiple street names, select the street name you think is correct. Multiple street names may appear because the address entered is misspelled.
- e. In the **Address ranges for selected** grid, the address ranges for the selected street appear. Use this information to find or determine the correct street address. At the top of the screen, update the **Address** field as necessary.
- f. Click **Validate**. The program validates the updated address information. When the address

is valid, the program standardizes it and updates it with any missing information. You return to the batch data entry screen.

Commit Multiple Batches



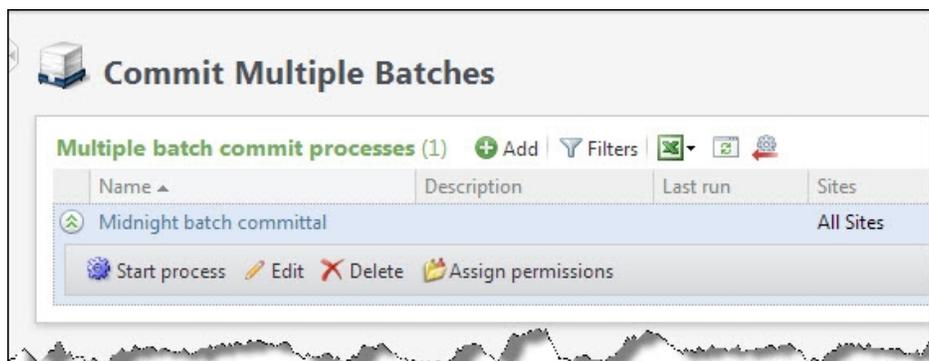
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In **Batch entry**, you can use a batch to enter and update information on multiple records at one once. To add or update the records in your database, you must commit (apply and save) the batch to your database.

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 69](#).

> 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. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, in the **Site** field, select "All sites."
5. 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.

6. 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**.
7. 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 145](#).

Start a Multiple Batch Commit Process

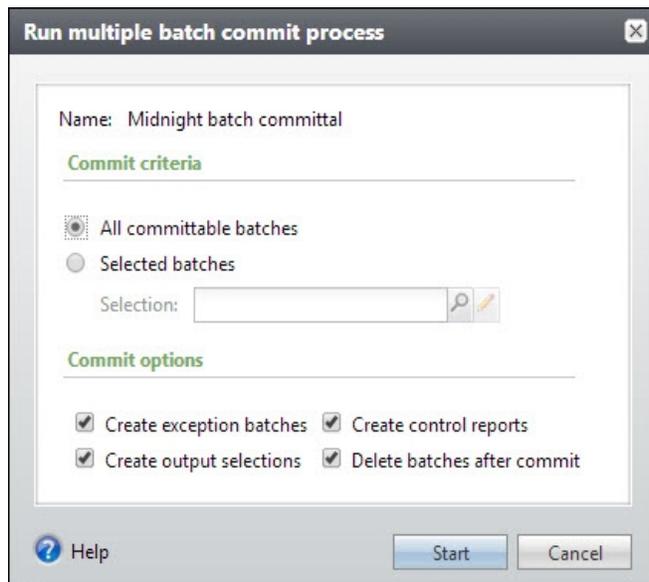
When you start and run a multiple batch commit process, the program commits the selected committable batches that you have rights to commit. When the process commits a batch, the program uses the data in the batch to automatically create or update records in the database.

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 145](#).



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 145.](#)

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. In the **Site** field, select the site or sites you want to associate with this process.
4. 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.
5. 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.

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 185](#).
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

Job name	Enter a name for the job schedule.
Schedule type	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> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	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.
Daily frequency	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 Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.

Screen Item Description

Start date	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 .
-------------------	--

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

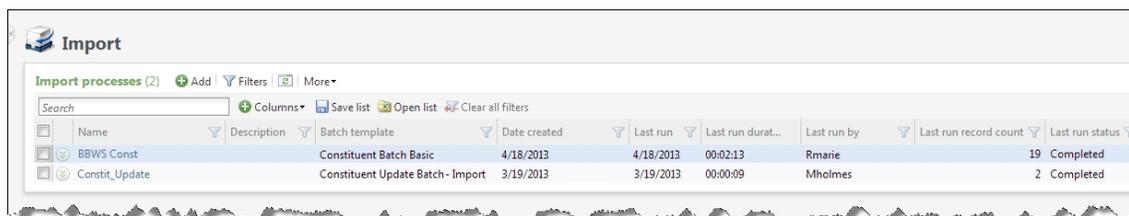
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With *Import*, you can easily move data from one program to another. *Import* is particularly useful when your organization maintains multiple databases or when you frequently move information in and out of the database. In *Import*, you can create 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's a header 'Import' with a search bar and several action buttons: 'Add', 'Filters', 'More', 'Columns', 'Save list', 'Open list', and 'Clear all filters'. Below this is a table with the following data:

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 152](#).

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.

Tip: To change the default import file path that may exist after installation, from the `\bbapfx\root` folder on your web server, update the following line in the `<appSetting>` section of the Web.Config file: `<add key = "ImportFilePath" value=" <directorypath>" />`.

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.

The screenshot shows a dialog box titled "Add SFTP server import source". It is divided into two sections: "Server information" and "Login credentials".

- Server information:**
 - Name:** Default SFTP server
 - URL:** \\pts99\ImportFiles\
 - Port:** 22
- Login credentials:**
 - User name:** RSmith
 - Password:** [masked with dots]

At the bottom right of the form area is a "Test connection" button. At the bottom of the dialog box are three buttons: "Help" (with a question mark icon), "Save", and "Cancel".

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. If your organization uses sites, in the **Site** field, select the site that uses this import source. If the import source is available to users associated with any site, select "All sites."
8. Under **Login credentials**, enter the user name and password for the SFTP server.

9. To make sure the connection works properly, click **Test connection**.
10. 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 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. You can restrict this template to a specific site in your organization. When you select a site, only users associated with the site can access the template. To allow users of all sites to access the template, select "All sites."
7. 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.
8. To specify the first row of the import file as the header row, select **First row is header**.

9. In the **File delimiter** field, select the character used to separate values in the file. You can use any delimiter except spaces and tabs.
10. 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.
11. 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.
12. 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.
13. 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.
14. 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."
15. 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."
16. Click **Save**. You return to the Import File Templates page.

➤ Add 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.

The screenshot shows a dialog box titled "Add a fixed-width file mapping template" with two steps: "Step 1: Read file columns" (active) and "Step 2: Map file to batch columns".

Name: CUB template

Batch template: Constituent Update Batch

Layout file:

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

Layout file: FCCC ADU layout.csv

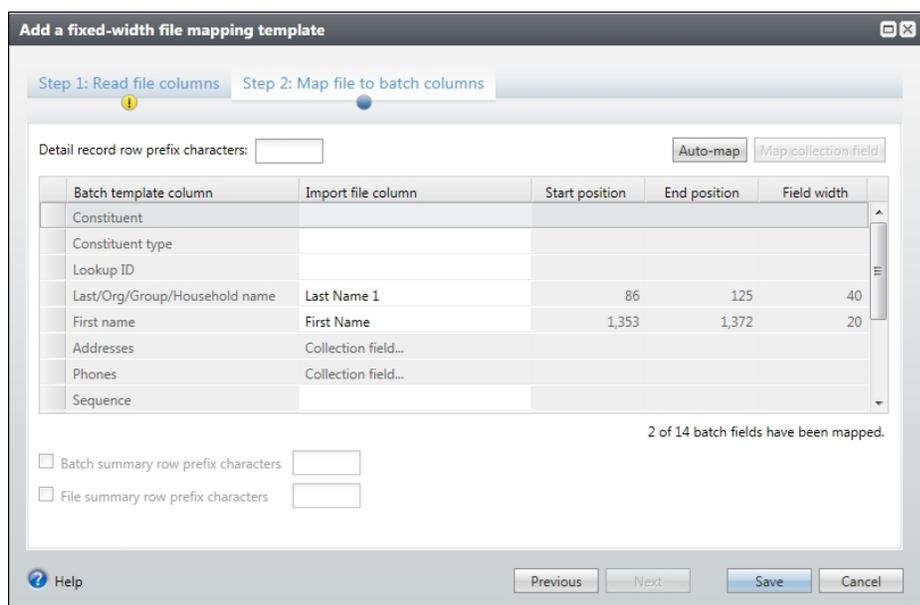
Layout file column mapping

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

Auto-map

Buttons: Help, Previous, Next, Save, Cancel

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. You can restrict this template to a specific site in your organization. When you select a site, only users associated with the site can access the template. To allow users of all sites to access the template, select "All sites."
7. 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.
8. To specify the first row of the import file as the header row, select **First row is header**.
9. 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.
10. 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.
11. 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.



12. 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.
13. 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.

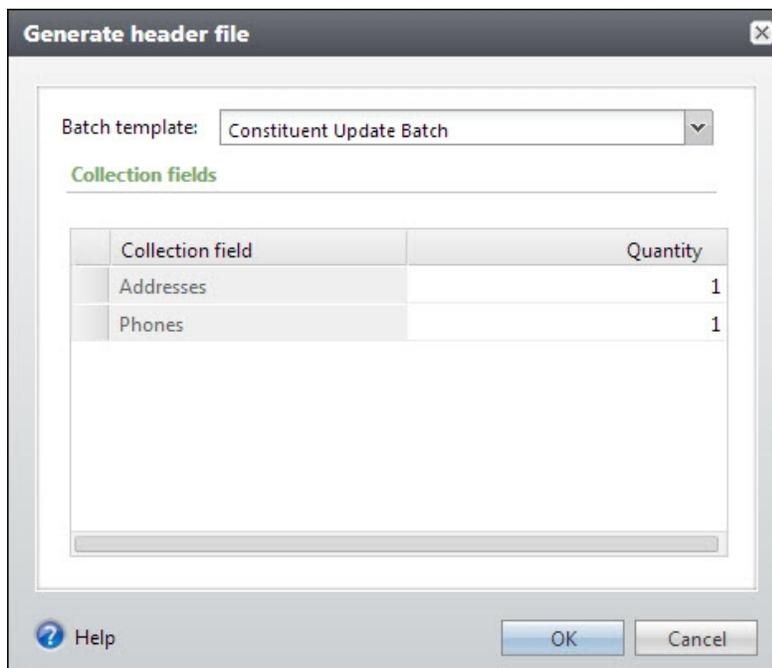
To automatically match columns in the import file to fields in the batch template, click **Auto-map**. The program attempts to match the columns of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.
14. When **Collection field** appears 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.
15. 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."
16. 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."
17. 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 181](#).

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**.

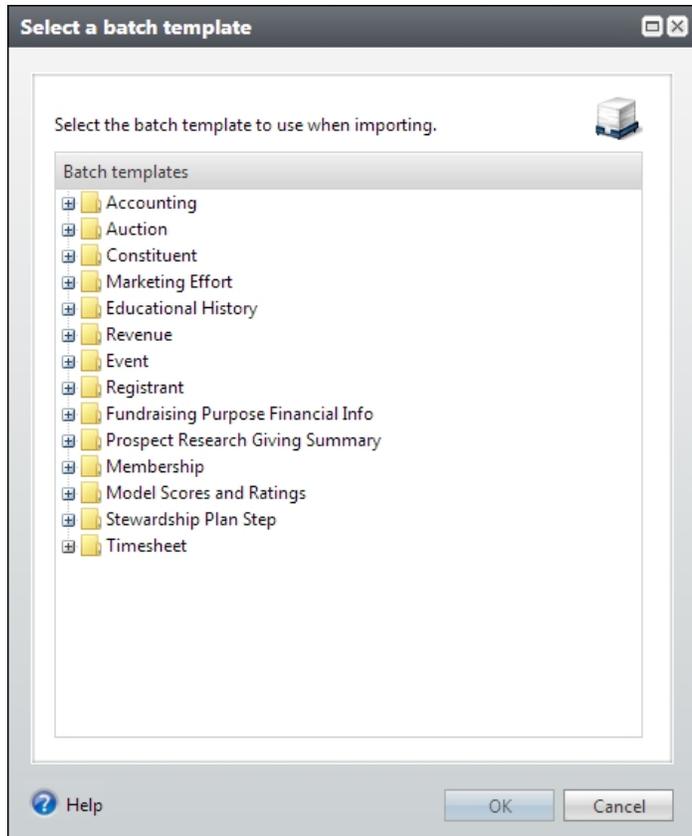
Add an Import Process

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 152](#).

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.

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 showing 'All Sites' with a search icon.
- Batch owner:** A dropdown menu.
- Batch template:** A dropdown menu showing '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', 'Recurring', and 'First row is header' (checked).
- Import source:** A dropdown menu showing 'Local file' with a folder icon.
- File:** A text input field showing '<File not specified>' with a green upload icon.
- Tips:** A light blue box with a lightbulb icon and the text: 'If you choose a recurring import type, only SFTP import sources are available for selection.'
- Buttons:** 'Previous', 'Next', 'Save', and 'Cancel' buttons at the bottom.
- Help:** A 'Help' button with a question mark icon at the bottom left.

- 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 161](#).

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.

- 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.

- 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.

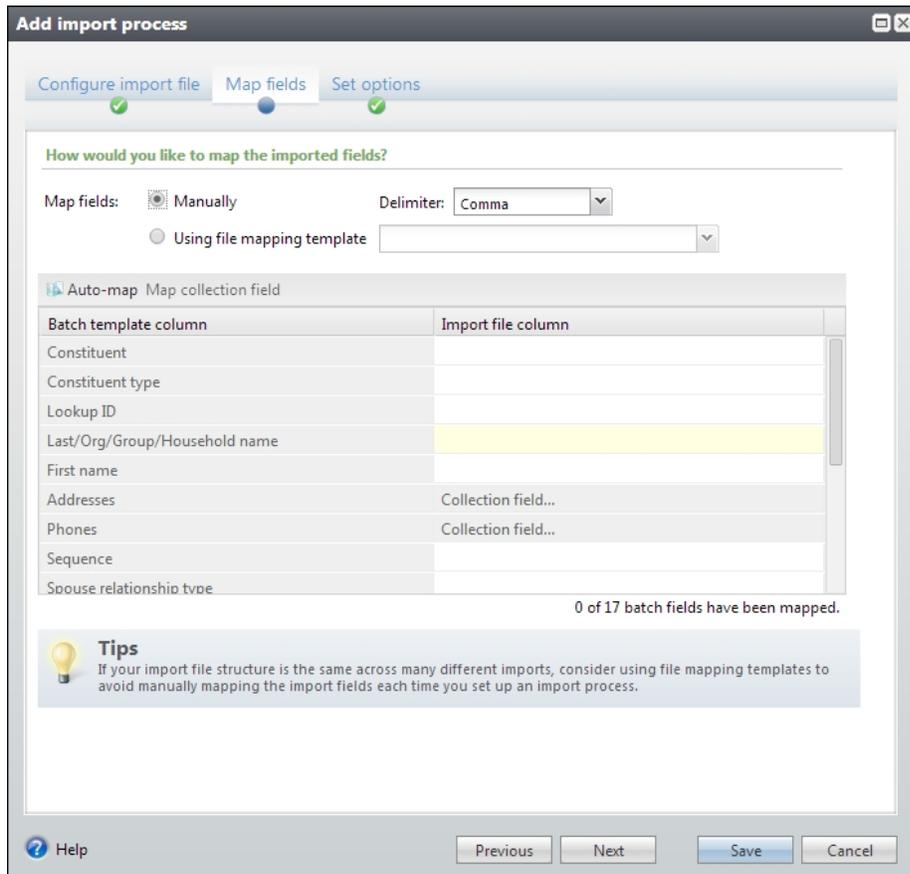
- You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, in the **Site** field, select "All sites."
- In the **Batch owner** field, select the batch processor to receive the batch created by the import process.
- 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.
7. To specify the first row of the import file as the header row, select **First row is header**.
 8. 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 152](#).
 - **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.
 9. 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.
10. 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 161](#).

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 155](#).

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.

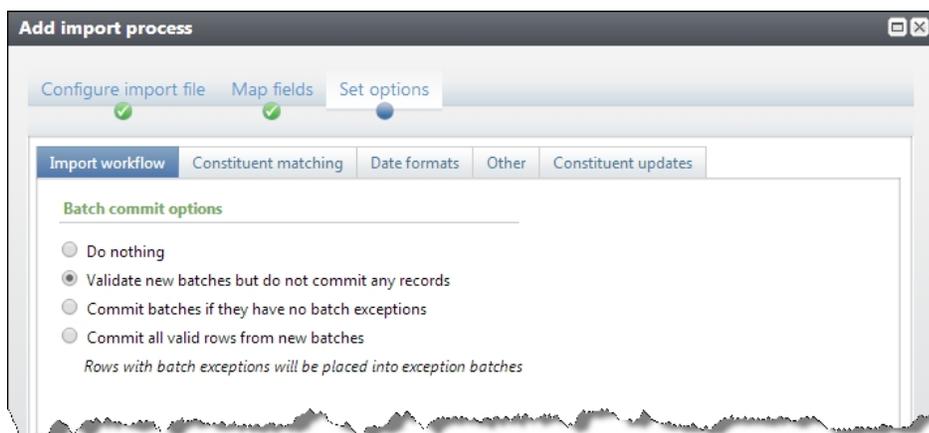
3. In the **Import file column** section, when **Collection field** appears for a field, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.

- 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 161](#).

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.



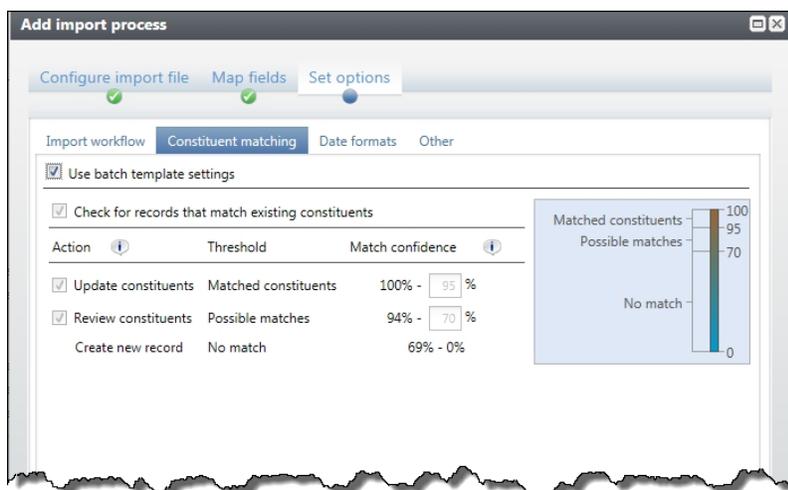
2. On the Import workflow tab, select which action to perform after batches are imported.
 - **Do nothing:** Select this option to manually validate and commit the batch at a later time. Use this option when another user must review the batch before you commit it, or when you need to skip the extra validation 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.

- **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 the following batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor. 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 *Administration 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 and Enhanced Revenue 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 174](#). For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.

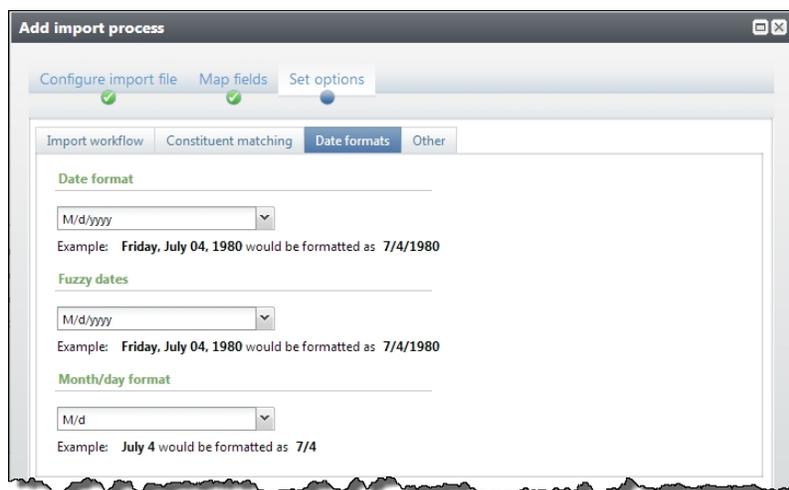
- b. Edit the percentage range for the **Possible matches** threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether 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 129](#).

- 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 revenue, enhanced revenue, or revenue update 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.



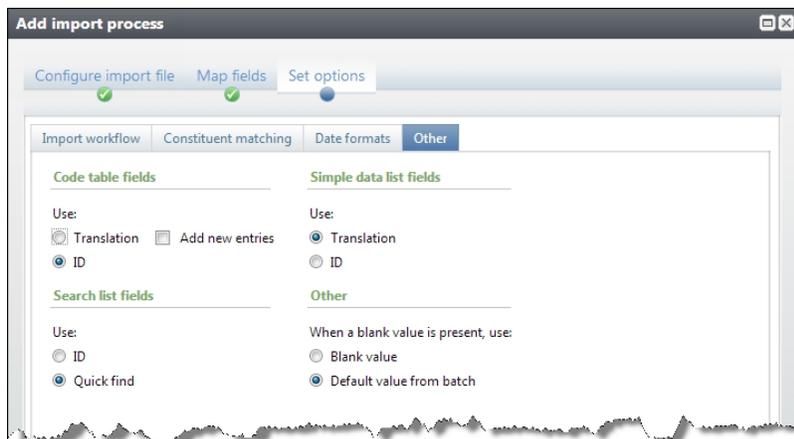
6. Under **Date format**, **Fuzzy dates**, and **Month/day format**, specify how dates appear in the imported data. Select the format from the drop-down list, or enter date specifiers to specify the format. The **Example** field displays how a date appears in the selected format.

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

Date Specifier	Description	Example
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.

- Select the Other tab.



- 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.
- 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.
- 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.

- 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.
- Select the Constituent updates tab.

Note: The Constituent updates tab is only available for Constituent Update and Enhanced Revenue batch templates.

13. You can use constituent update rules to manage how the program resolves conflicting data on matched constituents in the batch. When you select **Use batch template settings**, the rules default from the batch template selected for the import. To change the rules used for this import process, clear **Use batch template settings** and then select other rules. The rules defined on this tab apply to all batches produced from this import process. For more information about options on the Constituent updates tab, see [Constituent Updates on page 39](#).
14. 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
Do nothing	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.
Validate new	Select this option to validate the batch and then later commit the batch manually. Use this

Screen Item	Description
batches but do not commit any records	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.
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 if there are errors in the file. 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 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 these batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor.

Screen Item	Description
Use batch template settings	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 Use batch template settings to enable the options below.
Check for records that match existing records	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. Use the threshold settings to define your ranges for match confidence scores. Match confidence 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,

Screen Item	Description
	<p>suffixes, titles, addresses, and zip codes. For more information about how match confidence scores are calculated, see the <i>Administration Guide</i>.</p>
Update constituents	<p>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. This process occurs behind the scenes and requires no actions from users.</p> <p>Note: For Constituent Update and Enhanced Revenue 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 174. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.</p> <p>You can clear Update constituents to turn off automatic updates.</p>
Review constituents	<p>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 129.</p> <p>You can clear Review constituents to turn off manual reviews. For example, you may clear Review constituents 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>
Add new constituent	<p>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.</p> <p>The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For revenue, enhanced revenue, or revenue update 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

Date format	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 Example field displays how a date appears in the selected format.
Fuzzy dates	Specify how incomplete, or fuzzy, date values are formatted in the import file. You can select the

Screen Item Description

	format from the drop-down list or enter date specifiers to create a new format. The Example field displays how a date appears in the selected format.
Month/day format	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 Example 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

Code table fields	Select whether the import file contains the Translation or ID 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 Add new entries . If you are unsure which to select, consult your system administrator.
Simple data list fields	Select whether the import file contains the Translation or ID value of data to import from simple data list fields. If you are unsure which to select, consult your system administrator.
Search list fields	Select whether the import file contains the ID or Quick find 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 Quick find , the Constituent column within your import file must contain the constituent lookup ID.
Other	Select how to handle a blank value in the imported data. You can select to import the blank value (Blank value) or the default value from the selected batch template (Default value from batch).

Constituent Updates

The table below explains the items on the Constituent updates tab under **Set options**.

For detailed information about how the program uses constituent update rules to resolve conflicts on constituent records, see the *Administration Guide*.

Note: The Constituent updates tab is available for import processes that use Constituent Update and Enhanced Revenue batch templates.

Screen Item Description

Screen Item	Description
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.

Screen Item	Description
Name updates	<p>Under Name updates, for the If name is different from existing name setting, select one of these options:</p> <ul style="list-style-type: none"> • 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. <p>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.</p> <p>Note: Need a visual? View the name update flowchart.</p>
Address updates	<p>Under Address updates, for the If incoming address is similar to an existing address setting, select one of these options:</p> <p>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</p>

Screen Item**Description**

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 or Enhanced Revenue 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 (generate exception)** 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.

Screen Item

Description

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

Screen Item**Description**

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

Screen Item

Description

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 (generate exception)** 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

Screen Item	Description
	<p>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.</p> <ul style="list-style-type: none"> • 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.
	<p>For the Make new email address primary setting, select one of these options:</p>
	<p>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.</p>
	<ul style="list-style-type: none"> • 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.
	<p>Note: Need a visual? View the email address update flowchart.</p>
Birth date updates	<p>Under Birth date updates, for the If incoming birth date is not identical to existing birth date setting, select one of these options:</p> <ul style="list-style-type: none"> • Update birth date—Select this option to replace the birth date on the existing constituent with the birth date from the incoming constituent. The program updates the date automatically for all matched constituents. • Ignore birth date—Select this option to never overwrite the birth date on the existing constituent. The program discards the incoming birth date. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID, the birth date is always updated on the constituent regardless of the selected constituent update rule.</p>

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 145](#).

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 61](#).

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 77](#).

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.

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

Job name	Enter a name for the job schedule.
Schedule type	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> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	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.
Daily frequency	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 Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	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 .

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 185](#).

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.

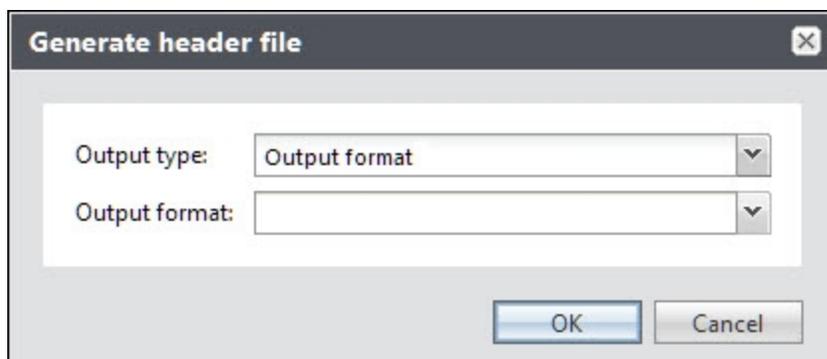
➤ Generate a Windows Scripting File

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 close button in the top right corner. Inside the dialog, there are 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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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							
Batch number: 56	Projected #:	4	Projected total:	\$1,250.00			
Status: Committed	Committed #:	4	Current total:	\$1,250.00			
Owner: BBNT Ba							
Exception batch number:	Payments:	4	Total payments:	\$1,250.00			
	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	1/09/2014	Payment (donation)	\$500.00	Check	NEWSLETTER	Library Fund
John T. Smith	71	1/09/2014	Payment (donation)	\$150.00	Cash	NEWSLETTER	Library Fund
Mary Young	8-10000137	1/09/2014	Payment (donation)	\$100.00	Check	NEWSLETTER	Library Fund
Kenneth Parker	125	1/09/2014	Payment (donation)	\$500.00	Cash	NEWSLETTER	Library Fund
1/09/2014 at 2:41 PM			Prepared by: BLACKBAUD Ba		Page 1 of 1		

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\IBA						
			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\IBA			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

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**.