



# FPM-CRM Connector

Version 4.0.36

Prepared by Blackbaud Customer Success Services

Table of Contents

- 1 ABOUT THIS DOCUMENT ..... 2**
  - 1.1 Document Terminology..... 2
- 2 Features..... 3**
  - 2.1 File Processing ..... 3
  - 2.2 FPM Configurations Page..... 4
  - 2.3 Batch Templates ..... 7
  - 2.4 Attributes..... 7
  - 2.5 Global Changes ..... 10
  - 2.6 Code Translation Table for FPM..... 10
- 3 CRM to FPM Data Flow..... 12**
  - 3.1 CRM Export Processes..... 12
  - 3.2 Custom Query Views for Exports..... 12
  - 3.3 Handling Required Fields in FPM ..... 13
  - 3.4 Handling CRM to FPM Exceptions..... 13
- 4 FPM to CRM Data Flow..... 14**
  - 4.1 Overview..... 14
  - 4.2 FPM Export Process ..... 14
  - 4.3 Code Table Values ..... 14
  - 4.4 Record Matching..... 14
  - 4.5 New and Modified Records..... 15
  - 4.6 Custom First Class Fields ..... 15
  - 4.7 Inactive Records ..... 16
  - 4.8 Import Process Workflow ..... 16
  - 4.9 Changing Interactions to Steps and Steps to Interactions ..... 17
  - 4.10 CRM Batch Defaults ..... 18
  - 4.11 Handling FPM to CRM Exceptions..... 18
  - 4.12 Import Validation Ad-hoc Queries ..... 18
- 5 CRM Business Practice after Equalization..... 19**
  - 5.1 CRM Data Maintained in FPM ..... 19
  - 5.2 CRM Data with Hybrid of CRM and FPM Maintenance ..... 21
  - 5.3 CRM Data Maintained in CRM..... 21

## 1 ABOUT THIS DOCUMENT

The **FPM-CRM Connector** is a bi-directional, file-based data transfer between Blackbaud CRM and Fundraiser Performance Management (FPM). This solution integrates FPM into CRM to incorporate fundraising specific information around major giving activities into the broader 360 degree view of a constituent that CRM provides. The goal of the integration is to allow major giving prospect opportunities, steps, and interactions to flow from FPM to CRM, and to allow prospect plan and constituent biographical updates to flow from CRM to FPM.

The FPM-CRM Connector was developed under the assumption that FPM will be used as the system of record for major giving prospect planning and gift officer activity. CRM users may initiate the creation of prospect plans and may create the initial series of prospect plan steps using plan step outlines to quickly create plan steps in bulk. CRM contains information for reporting and viewing purposes, but gift officers will use the FPM interface for updating records and recording additional activities (CRM “interactions”) and new proposals (CRM “opportunities”). CRM will remain the system of record for constituent/prospect biographical information.

### 1.1 Document Terminology

Term	Description
<b>Blackbaud CRM (BBCRM)</b>	A constituent relationship management database system developed by Blackbaud. In this document, Blackbaud CRM will also be referred to as <b>BBCRM</b> .
<b>Fundraiser Performance Management</b>	An online fundraising solution that is used for enhanced fundraisers/major giving officer management capabilities. In this document, <b>Fundraiser Performance Management</b> will also be referred to as <b>FPM</b> .
<b>FPM-CRM Connector</b>	A <b>Blackbaud CRM</b> and <b>Fundraiser Performance Management</b> integration using file based transfer to enable a sync of information between the two systems.

## 2 Features

### 2.1 File Processing

The **FPM-CRM Connector** is made up of several data flows, each involving multiple exports or imports.

1. Proposal and Activity Data flow from FPM to CRM
2. Constituent Biographical and Activity Data flow from CRM to FPM
3. Prospect Plans, Opportunities, and Steps created in CRM and sent to FPM

Although each import/export can be run on a one-off basis if needed for troubleshooting, they should be run as part of a queue. This ensures that all are run in the correct order, as many record types are dependent on one or more other processes having completed first.

The queue is created using standard CRM functionality. When a client is live, this should be scheduled to run automatically.

Queue List  
**FPM Integration Imports - Queue**

Name: FPM Integration Imports  
 Description: All FPM<->CRM Imports

Recent Status | History | Job Schedules

**Recent status**

Status: ✔ Completed  
 Status message: Completed

Started by: BLACKBAUDHOST\64747P\JobUser Server name: D2PBB\ISEC20AV  
 Started: 12/16/2020 7:30:01 AM Total records processed: 8  
 Ended: 12/16/2020 7:54:00 AM Number of exceptions: 0  
 Duration: 23 minutes 59 seconds Records successfully processed: 8

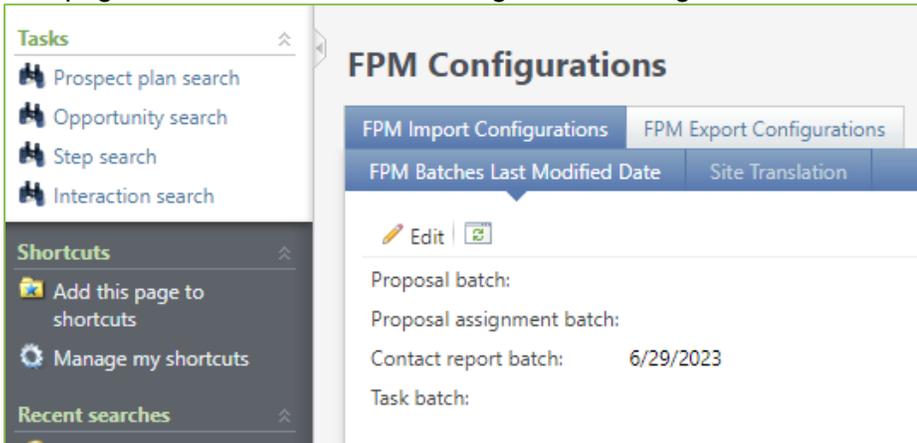
**Steps (8)**   More ▾

Step	Parameter set	Business process
1	FPM Proposal Import	Import Wildcards Process
2	FPM Proposal Assignment Import	Import Wildcards Process
3	FPM Proposal Related Contact Im...	Import Wildcards Process
4	FPM Contact Report Import	Import Wildcards Process
5	FPM Contact Related Contact Im...	Import Wildcards Process
6	FPM Proposal Related Task Import	Import Wildcards Process
7	FPM Task Batch Import	Import Wildcards Process
8	FPM Contact Related Task Import	Import Wildcards Process

## 2.2 FPM Configurations Page

An FPM Configurations page has been added to the Administrative functional area: Administration > Configuration > “FPM configurations.”

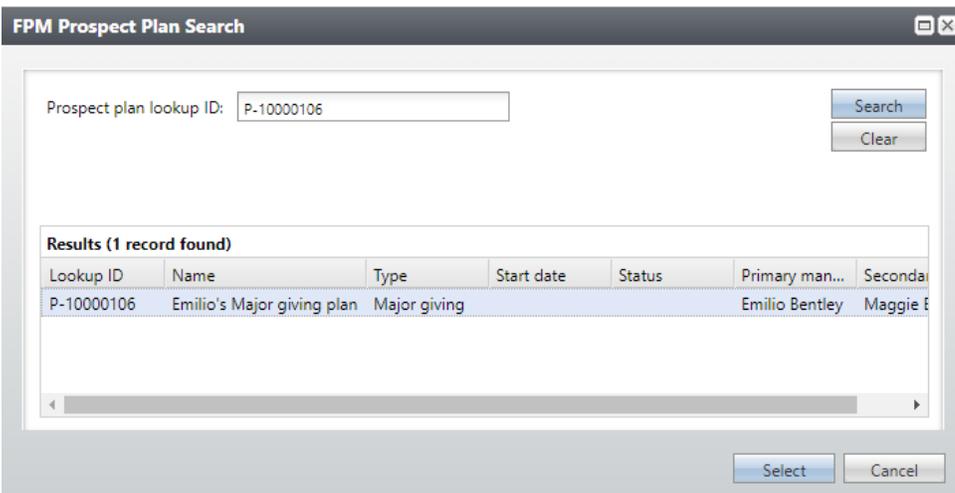
This page includes two tabs with configuration settings and four search tasks in the explorer bar.



### 2.2.1 FPM Search Tasks

Search tasks are available on the FPM Configurations page to assist with locating FPM records in CRM by Lookup ID. These searches are available for Prospect Plan, Opportunity, Step, and Interaction records.

Example: FPM Prospect Plan Search



FPM ID to CRM Lookup ID Translation

FPM ID Field	CRM Lookup ID
Prospect ID	Prospect Plan Lookup ID
Proposal ID	Opportunity Lookup ID
Proposal Related Contact Report ID	Step's Interaction Lookup ID
Contact Report ID	Interaction Lookup ID

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## 2.2.2 FPM Import Configurations

The FPM Import Configurations tab includes two subtabs to manage imports:

1. **FPM Batches Last Modified Date** – controls incremental updates based on created/modified dates in the Activity Center files.
2. **Site Translation** – defines the translation between Activity Center's School/Unit Code and Blackbaud CRM's Site ID, if they are not identical.

### 2.2.2.1 FPM Batches Last Modified Date

Each export from FPM includes all record history, meaning the import process has access to Created Dates and Modified Dates going back through all time. The custom imports are designed to focus on records created or modified on or after the last import date. The FPM Configuration page and edit form allow users to over-ride the date range of records to import from FPM. Users may reset all data by supplying blank date values or choose another date in the history to go back through.

Access the FPM Batch Configurations page under Administration > FPM Configurations and select the first tab "FPM Batches Last Modified Date."

The screenshot shows the "FPM Configurations" page with two main tabs: "FPM Import Configurations" (selected) and "FPM Export Configurations". Under "FPM Import Configurations", there are two subtabs: "FPM Batches Last Modified Date" (selected) and "Site Translation". Below the subtabs, there is an "Edit" button with a pencil icon and a refresh icon. The main content area lists four batch types with their corresponding date values:

- Proposal batch: [mm/dd/yyyy]
- Proposal assignment batch: [mm/dd/yyyy]
- Contact report batch: [mm/dd/yyyy]
- Task batch: [mm/dd/yyyy]

Open the Edit form to change the date values.

The screenshot shows the "Edit last modified date for FPM batches" dialog box. It contains four input fields, each with a date value and a calendar icon:

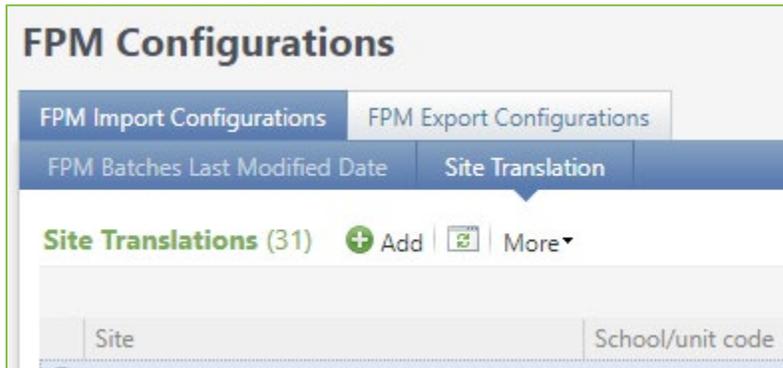
- Proposal batch: [mm/dd/yyyy]
- Proposal assignment batch: [mm/dd/yyyy]
- Contact report batch: [mm/dd/yyyy]
- Task batch: [mm/dd/yyyy]

At the bottom of the dialog box, there are "Save" and "Cancel" buttons.

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## 2.2.2.2 Site Translation

The import templates map School/Unit Code to Blackbaud CRM's Site ID. Typically the Site ID from Blackbaud CRM will map directly into the School/Unit Code in Activity Center with the export file FPM 4.1 Code Table Translations providing the code to description translation. However, if there is an occasion where the School/Unit Code is autogenerated by Activity Center, it is possible to map the Activity Center code back to Blackbaud CRM's Site ID on the Site Translation sub-tab within the FPM Import Configurations.



If some School/Unit Codes are an exact match to Site ID while others are not, it is only necessary to enter the School/Unit Codes that differ from the corresponding Site ID. The import will first check this translation table, and if no record is found for an Activity Center School/Unit Code, then the import processes will assume it is an exact match to an existing Site ID in Blackbaud CRM.

**Note** — An FPM Analyst can provide the complete list of Activity Center's School/Unit Codes with School/Unit Description. From the front-end only the descriptions are visible.

Click "Add" to add a new relationship or expand the options on an existing record to "Edit" and existing relationship.

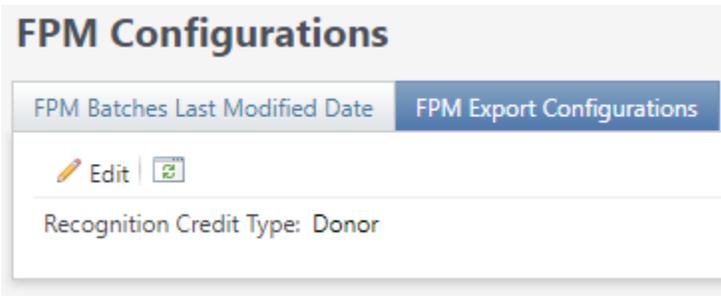
 The dialog box is titled 'Add an FPM school unit cross reference' and has a close button (X) in the top right corner. It contains two input fields: 'Site:' with a dropdown menu and 'School/unit code:' with a text input field. At the bottom, there are 'Save' and 'Cancel' buttons.

There may be only one School/unit code related to each site and only one Site related to a School/unit code value.

### 2.2.3 FPM Export Configurations

Specify which recognition credit type is applied to donors to capture their hard credit for recognition. View this configuration in the FPM Configurations page by navigating to Administration > FPM Configurations and viewing the second tab “FPM Export Configurations.”

Selecting the proper recognition credit type is critical to properly recognize the donor’s contribution within FPM. This feature avoids double-counting additional “soft” recognitions on the donor’s record, in case such a business practice is in place.



## 2.3 Batch Templates

This package includes the following Batch and Import templates:

1. FPM Contact Related Contact Batch
2. FPM Contact Related Task Batch
3. FPM Contact Report Batch
4. FPM Proposal Assignment Batch
5. FPM Proposal Batch
6. FPM Proposal Related Contact Batch
7. FPM Proposal Related Task Batch
8. FPM Task Batch

## 2.4 Attributes

The following attributes support optional and required fields out of FPM.

Record Type	Attribute Name	Description	Data Type	One per record?
<b>Interaction</b>	FPM Proposal ID	FPM relates Contact Reports and Tasks to Proposals. The equivalent in CRM requires identifying Opportunity Lookup ID on each interaction and plan step. In FPM, a Contact Report or Task may relate to multiple Proposals, making this a one:many attribute.	Text	No

Record Type	Attribute Name	Description	Data Type	One per record?
Opportunity	FPM Proposal Name	<p>CRM does not name opportunities, but FPM does name Proposals. Record FPM's Proposal Name as an Opportunity Attribute when supplied by FPM.</p> <p><b>Note</b> — When an opportunity is created in CRM, the export will send the Plan Name to FPM for use as the Proposal Name. FPM users may update the Proposal Name in FPM, this value is returned to CRM to update the Opportunity FPM Proposal Name Attribute.</p>	Text	Yes
Opportunity	FPM Proposal Expected Amount	FPM allows fundraisers to record an expected amount in addition to the target amount. Expected amount should be treated as an Opportunity Attribute in CRM because it is not the same as Expected Ask Amount (aka Target Amount in FPM).	Currency	Yes
Opportunity	FPM Proposal Expected Date	FPM allows fundraisers to record an expected date in addition to the target date. Expected date should be treated as an Opportunity Attribute in CRM because it is not the same as Expected Ask Date (aka Target Date in FPM).	Date	Yes
Interaction	FPM Related Contact Report ID	FPM allows fundraisers to link Contact Reports to a parent Contact Report. The children of a Contact Report will be listed in this one:many attribute on the Interaction.	Text	No
Interaction	FPM Related Task ID	FPM allows fundraisers to link Tasks to a parent Contact Report. The child tasks of a Contact Report will be listed in this one:many attribute on the Interaction.	Text	No
Interaction	FPM Goal Strategy	"Goal & Strategy for Contact" is an optional field on FPM Contact Reports. Some clients may choose to hide this field from the FPM front-end.	Memo	Yes
Interaction	FPM Contact Report School/Unit	<p>FPM can record only one school/unit value per Contact Report, whereas CRM allows users to track multiple sites related to an interaction. Use this interaction attribute to identify the Site ID that was assigned as the FPM School/Unit.</p> <p>Value = Contact Report School/Unit Description</p> <p>Comment = Contact Report School/Unit Code</p> <p><b>Note</b> — The school/unit values available in FPM's drop-down interface will be determined by the client upon equalization. These should align with CRM sites, but might not include the entire hierarchy.</p>	Text	Yes

Record Type	Attribute Name	Description	Data Type	One per record?
Interaction	FPM Contact Report Project of Interest	<p>Project of Interest is an optional field on FPM Contact Reports. Users can select values from a list of values supplied during equalization.</p> <p><b>Note</b> — The values available in FPM's drop-down interface should be populated from Funding Types code table during equalization.</p> <p><b>Note</b> — This field may be populated in FPM for non-plan step interactions as well as plan steps.</p> <p><b>Note</b> — There is no requirement in FPM for this value to match the Project of Interest on the related Proposal(s).</p>	Code Table: Funding Type	Yes
Opportunity	FPM Proposal Project of Interest	<p>FPM's Project of Interest on Proposals is recorded as an Opportunity Attribute because in CRM the concept may be 1:many, while the value has a 1:1 relationship with proposals in FPM.</p> <p><b>Note</b> — The values available in FPM's drop-down interface should be populated from Funding Types code table during equalization.</p>	Code Table: Funding Type	Yes
Opportunity	FPM Proposal School/Unit	<p>FPM can record only one school/unit value per Proposal, whereas CRM allows users to track multiple sites related to an Opportunity's Prospect Plan and also through the Opportunity Designations. Use this opportunity attribute to identify the Site that was assigned as the FPM School/Unit.</p> <p>Value = Proposal School/Unit Description</p> <p>Comment = Proposal School/Unit Code</p> <p><b>Note</b> — The school/unit values available in FPM's drop-down interface will be determined by the client upon equalization. these should align with CRM sites, but might not include the entire hierarchy.</p>	Text	Yes
Opportunity	FPM Proposal Funding Type	<p>FPM can record only one Funding Type on a Proposal, whereas CRM allows users to track multiple Funding Method Codes on an Opportunity.</p> <p><b>Note</b> — The values available in FPM's drop-down interface should be populated from Funding Method code table during equalization.</p>	Code Table: Opportunity Funding Method	Yes
Opportunity	FPM Proposal Campaign Project	<p>FPM can record only one Campaign Project on a Proposal, whereas CRM allows users to track multiple Campaigns on an Opportunity.</p>	Text	Yes

Record Type	Attribute Name	Description	Data Type	One per record?
		<b>Note</b> — The values available in FPM's drop-down interface should be populated from the Campaigns object during equalization.		

## 2.5 Global Changes

Three custom global change definitions support the FPM-CRM Connector.

Name	Description
<b>FPM Proposal Name to Opportunity Attribute</b>	If the opportunity attribute "Proposal Name" is empty, then populate with the name of the prospect plan. This maps to the name of the proposal when an opportunity is sent from BBCRM to FPM for the first time.
<b>FPM Proposal ID to Interaction Attribute</b>	If a step's interaction attribute "Proposal ID" has no values, then identify all opportunities related to the step's plan and place the opportunity lookup ID values into the "Proposal ID" attribute on the interaction record. There may be more than one attribute value if the plan has multiple opportunities. This links the contact report to proposals when the step is sent to FPM for the first time.
<b>Delete committed FPM Batches</b>	Allows an as-needed clean-up of batches based on a selected date and batch type

## 2.6 Code Translation Table for FPM

This connector assumes that the code value fields were provided to FPM during the CRM/FPM equalization phase. If no Customer Code is provided, FPM will create a code value to represent each distinct description within the File Name/Field Name.

The **FPM-CRM Connector** includes a custom query view called "FPM Code Table Translations" of custom record type "FPM Codes" to load standard codes and their descriptions. An ad-hoc query export process delivers "File 4.1 Code Translations Table," referenced in the [Blackbaud Fundraiser Performance Management Data Request Guide](#).

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**Note** — Code Definitions: For fields that are defined within the Code Translations Table file, all values that appear in the files sent to FPM must be included in the Code Translations Table. Values in the files sent to FPM that cannot be matched to Code Translations will appear blank after the record is loaded to FPM. For example, if a Proposal file contains an unrecognized value in School/Unit, the proposal will be loaded with blank School/Unit until the new School/Unit code is added to the Code Translations Table.

**Note** — Active/Inactive Codes: If users determine that some of these values should not be available in the FPM drop down, due to an inactive status, Client must work with Blackbaud Support to deactivate codes from the drop downs.

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## Code Considerations in CRM

During the equalization phase, the client configured CRM code tables to support FPM.

Code Table	Notes
<b>Interaction Category</b>	<p>Determine the default values to be applied to Contact Reports mapped into Interactions. Interaction Category is only required when Interaction Subcategory is populated from FPM's Contact Report Outcome.</p> <p>Example:</p> <ol style="list-style-type: none"> <li>1. "FPM Proposal Contact Report" for proposal related contacts (step interactions)</li> <li>2. "FPM General Contact Report" for non-proposal related contacts (standard interactions)</li> </ol>
<b>Contact Method</b> <b>(Code Table is "Interaction Type" in BBCRM)</b>	<p>FPM's Contact Type (aka "Activity Type") is a required field on Contact Reports. Since CRM does not require Contact Method on plan step interactions, it was necessary during implementation to configure in the FPM ETL a translation for blank values to a valid CRM Contact Method.</p> <p>Considerations: FPM requires translation of CRM values into standard FPM Contact Type values. FPM also allows users to configure which values show up in activities lists and which are hidden by default.</p>

## 3 CRM to FPM Data Flow

The FPM-CRM Connector includes a solution to extract data files from CRM, meeting the requirements of FPM's data request guide.

### 3.1 CRM Export Processes

The FPM-CRM Connector includes base-line export definition and ad-hoc query exports to select constituent, prospect plan, opportunity, and step/interaction records. Clients configure the exports to fit business practice.

The following requirements apply to the export and file sharing process.

1. FPM requires all extract files to supply all records, not incremental.
  - a. *Exception: records that are made "editable" in FPM do not need to be sent to FPM again. FPM will ignore re-sends of records that are already loaded into FPM as "editable."*
2. Files will be comma delimited .csv files with field headers and double quote enclosed text fields.
3. Files will replace the previous day's copy on the FPM SFTP site with identically named files per naming conventions established during implementation.

### 3.2 Custom Query Views for Exports

The following custom query views are included to support these export processes.

Custom Query View	Description
<b>FPM Export Code Table Translations</b>	Output codes and definitions for values to be defined in FPM
<b>FPM Export Entity Fields</b>	Output required FPM Entity fields that require calculation.
<b>FPM Export Address Fields</b>	Output required FPM Address fields that require calculation.
<b>FPM Export Phone Fields</b>	Output required FPM Phone fields that require calculation.
<b>FPM Export Prospect Fields</b>	Output FPM's Prospect Status Indicator field
<b>FPM Export Proposal Fields</b>	Output FPM's required Proposal fields in required format.
<b>FPM Export Prospect Assignment Fields</b>	Arrange prospect staff assignments in the format required by FPM's ETL
<b>FPM Export Proposal Assignment Fields</b>	Arrange proposal staff assignments in the format required by FPM's ETL
<b>FPM Export Activity History</b>	Arrange steps and interactions in the format requires to sent multiple entities and staff assignments to FPM. Include required calculated fields.
<b>FPM Export Transaction History</b>	Arrange revenue and recognition credit records in one export format as required by FPM's ETL.
<b>FPM Export Appeal</b>	Combine Mailing and Whitemail information into the format required to support FPM's Appeals.
<b>FPM Export Appeal Entity</b>	Identify the FPM Appeal Code value for each ConstituentAppeals record

### 3.3 Handling Required Fields in FPM

There are fields required by FPM that are not required by CRM. FPM accepts records from CRM with missing required values. FPM users will encounter issues with these missing values when they attempt to update a record in FPM. The FPM user interface pops up an error message calling for the blank field to be populated before the record can be saved in the front-end of FPM.

### 3.4 Handling CRM to FPM Exceptions

Code table values that appear on records but are not included in the Code Translations Table will appear blank in FPM on the loaded records. See note about Code Translation Table under "CRM/FPM Equalization" above.

Constituent merges in CRM may result in orphaned Entity ID's across files in FPM because the Entity file itself is truncated and re-loaded with each refresh. FPM creates blank Entity records for orphaned Entity IDs. If a Prospect in FPM is linked to an Entity who is no-longer included in the Entity file from CRM, the FPM Data Integration team can assist with a manual update. Client would need to provide the master Entity ID for merge pairs through a support ticket.

## 4 FPM to CRM Data Flow

### 4.1 Overview

The FPM-CRM Connector uses custom query views and custom batches based on traditional CRM import and batch types/templates that can be additionally customized, if needed.

### 4.2 FPM Export Process

The following requirements apply to the export and file sharing process.

1. FPM exports text files that are double pipe ( || ) delimited.
2. Files will be delivered to the FPM SFTP site **based on the client's schedule\***, after the FPM ETL loads the nightly feed from CRM.
3. Files follow the naming conventions established during implementation. File names include date suffixes to assist the wildcard import process in CRM.established during implementation. File names include date suffixes to assist the wildcard import process in CRM.

\*Imports should avoid Saturday and Sunday run dates to ease batch exception handling on Monday.

### 4.3 Code Table Values

Values appearing in drop-downs in FPM are controlled by File 4.1: Code Translation Table, provided by CRM. Only relevant values provided by CRM will be available for selection in FPM. This means that CRM does not expect new code table values to come back from FPM. See section on Code Table Translation for FPM under CRM/FPM Equalization.

### 4.4 Record Matching

Lookup IDs match records across CRM and FPM. Constituent and Interaction Lookup IDs are standard fields in CRM. Prospect Plan and Opportunity Lookup IDs are custom first class fields included in the FPM-CRM Connector. Custom query views "Opportunity Lookup ID" and "Prospect Plan Lookup ID" exist to allow users to query and export these field values.

CRM Object	Lookup ID Name	Notes
<b>Constituents</b>	Constituent Lookup ID	Constituents originate in CRM. The CRM Constituent Lookup ID becomes FPM's Entity ID*.
<b>Interactions</b>	Interaction Lookup ID	Interactions (including plan steps) may originate in CRM or in FPM as Contact Reports or Tasks. The FPM Contact Report ID and Task ID will be loaded into CRM's Interaction Lookup ID for each respective file. FPM Contact Report ID is prefixed by "R" while Task IDs are prefixed by "T."

CRM Object	Lookup ID Name	Notes
<b>Prospect Plans</b>	Prospect Plan Lookup ID	Prospect plans only originate in CRM. The CRM Prospect Plan Lookup ID becomes FPM's Prospect ID.
<b>Opportunities</b>	Opportunity Lookup ID	Opportunities may originate in CRM or in FPM as new Proposals under an existing Prospect record (i.e. CRM Prospect Plan). Example of FPM Proposal ID: RS2723281

**Note** — \*Entities merged within CRM may result in orphaned entities in FPM. Provide merged constituent mapping to Blackbaud Support to update Entity IDs in FPM to match the merged-to constituent.

### 4.5 New and Modified Records

CRM will import/update only those records that are new in FPM or modified in FPM since the last FPM export. This means that changes to records in CRM persist until an FPM user's modifications send an update. CRM users should reference the FPM flag on Opportunities and Steps/Interactions to be aware of FPM's "ownership" of the record.

### 4.6 Custom First Class Fields

The integration will include the following custom first class fields to support the references between FPM and CRM.

Field	Description
<b>Prospect Plan Lookup ID</b>	<p>Prospect Plan Lookup ID is not a native field in CRM. This custom field is included in the FPM/CRM integration so that users can easily cross-reference FPM Prospects/CRM Prospect Plans. Prospect Plan Lookup ID will be eight digits prefixed by "PP-" so that the first generated value is "PP-10000000."</p> <p>All prospect plans originate in CRM, so no new sequences will be received from FPM.</p> <p>Prospect Plan Lookup ID appears in ad hoc query via custom query view.</p>
<b>Opportunity Lookup ID</b>	<p>Opportunity Lookup ID is not a native field in CRM. This custom field must be included in the FPM/CRM integration so that users can easily cross-reference FPM Proposals/CRM Opportunities. Opportunity records can originate in either CRM or FPM. Records originated in CRM will be eight digit values prefixed by "OP-" so that the first generated value is "OP-10000000."</p> <p>Opportunities originated as Proposals in FPM will begin with "R" in the format "RS2723281."</p>

Field	Description
	Opportunity Lookup ID appears in ad hoc query via custom query view.

## 4.7 Inactive Records

When users delete records in FPM, an inactive indicator is sent to CRM.

CRM business rules for handling records deleted by FPM users:

1. **Interactions:** change status to "Cancelled" when FPM's contact report is inactive.
2. **Opportunities:** change status to "Cancelled" when FPM's proposal is inactive.
3. **Opportunity Solicitor Assignments:** apply end date when FPM's staff assignment on proposal is inactive.

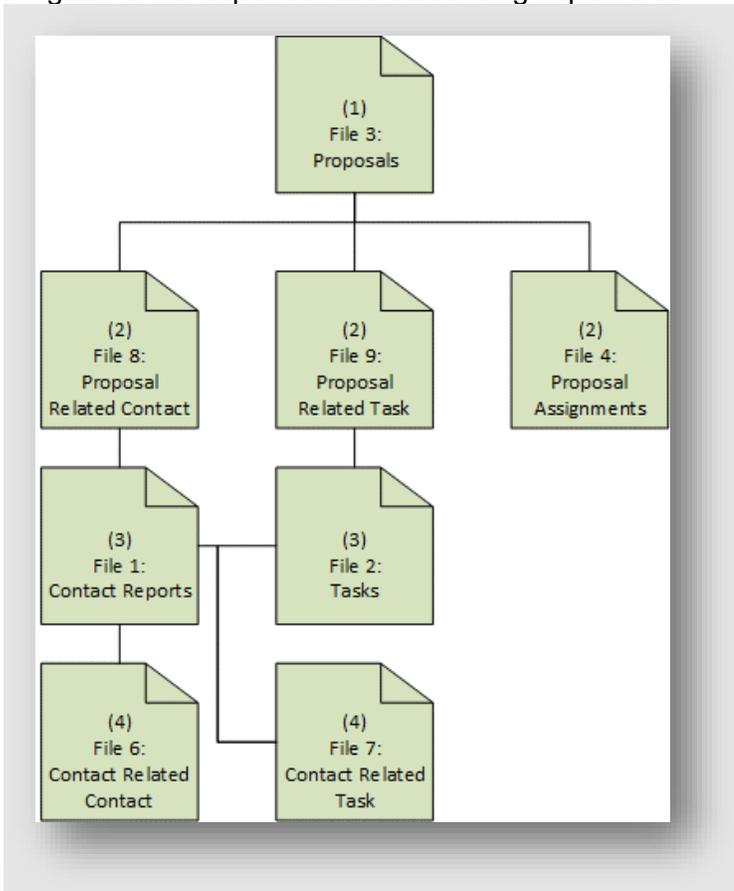
## 4.8 Import Process Workflow

Ten files are exported from FPM, but only eight are loaded into CRM. Eight custom batches manage the imports. A queue insures that batches run in the appropriate order to manage dependencies.

Batch Name	Description
<b>FPM Proposal Import</b>	Imports File 3: Proposals The Proposals file supplies opportunity and prospect plan details. Each new FPM Proposal will create a corresponding CRM Opportunity. FPM Proposals can only be created for existing FPM Prospects (CRM Prospect Plans), since Prospects will be read-only in FPM.
<b>FPM Proposal Assignment Import</b>	Imports File 4: Proposal Assignments Proposal Assignments may be updated from the list of Staff available in FPM. The Staff list is loaded from the "Fundraiser" constituency output from CRM, guaranteeing that assigned solicitors are fundraisers in CRM. Within CRM, in order to assign solicitors in any role to an Opportunity, the fundraiser must be assigned to the Prospect Plan as a primary manager, secondary manager, or secondary solicitor.
<b>FPM Proposal Related Contact Import</b>	Stages File 8: Proposal Related Contact The Proposal Related Contact Batch commits records to a staging table that will be referenced by the following Contact Reports batch.
<b>FPM Contact Report Import</b>	Imports File 1: Contact Reports The FPM "Contact Reports" file maps to CRM "Steps/Interactions" as interactions tied to a constituent or to a plan (through Files 8: Proposal Related Contacts).
<b>FPM Contact Related Contact Import</b>	Imports File 6: Contact Related Contact Dependent on the preceeding FPM Contact Report Import, this import populates the interaction attribute "FPM Related Contact Report ID."
<b>FPM Proposal Related Task Import</b>	Stages File 9: Proposal Related Task The Proposal Related Task Batch commits records to a staging table that will be referenced by the following Tasks batch.

Batch Name	Description
<b>FPM Task Import</b>	Imports File 2: Tasks In FPM, tasks are internal actions where the Owner will be recorded in CRM as both the Officer and the Constituent.
<b>FPM Contact Related Task Import</b>	Imports File 7: Contact Related Task Dependent on the preceding FPM Task Import and FPM Contact Report Import, this import populates the interaction attribute "FPM Related Task ID."

Diagram of file dependencies influencing import order:



## 4.9 Changing Interactions to Steps and Steps to Interactions

The relationship of an FPM contact report to a proposal indicates to CRM that the contact report is a prospect plan step. FPM users can remove the link between a contact report and a proposal. This tells CRM to remove the step from the plan and convert it to a standard interaction. The concept works in reverse as well: adding a proposal to an FPM contact report indicates to CRM that the standard interaction should now be a prospect plan step. The ability to convert an interaction to a step and a step to an interaction is not native within BBCRM and is unique to the custom batch that supports this FPM integration.

## 4.10 CRM Batch Defaults

The Contact Report batch requires a default value for each of the following fields:

1. Time Zone (to support the Start Time and End Time)
2. Interaction Category for Step Interactions (to support mapping Outcome to Interaction Subcategory)
3. Interaction Category for Standard Interactions (to support mapping Outcome to Interaction Subcategory)

## 4.11 Handling FPM to CRM Exceptions

CRM's batch process will output exceptions when records from FPM cannot be inserted or updated in CRM. Client should review exceptions to determine if the exception needs to be resolved in FPM or CRM.

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**Note** — The import will focus on records modified on or after the last import date, so exceptions need to be resolved within the batches where they show up. The rejected record might not be imported again the next day. Users may be able to re-create the exception by back-dating the last import dates on the FPM Batch Configuration page.

**Note** — Do not process partial batches for Contact Related Contact nor Contact Related Task files. Since created and modified dates are unavailable, these batch processes "flush-and-fill" the related interaction attributes across all interaction records. At the completion of the batch, only the records found in the batches will have the attribute populated in CRM. For this reason, users should not commit a partial batch or attempt to commit exceptions without the entire record set.

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## 4.12 Import Validation Ad-hoc Queries

Import Validation queries are added to the environment within the initial configuration files. These ad-hoc queries are useful to view the state of records before and after import processes run, bringing together values across many tables into one flat file for review. These queries include:

Ad-hoc Query Name	Description
<b>FPM Validation Activity Center: Proposals to Opportunities</b>	Activity Center's Proposals map to Opportunities. Query related fields to view values before and after import.
<b>FPM Validation Activity Center: Proposal Assignments to Opportunity Solicitors</b>	Proposal assignments are added to Opportunity Solicitors. However, since Opportunity Solicitors must be a sub-set of Prospect Plan managers and solicitors, any new names are added as Prospect Plan Secondary Solicitors too. It may be necessary to add the CRM fields for Expected Amount and Expected Date to the output. Query Prospect Plan Secondary Solicitors and Opportunity Solicitors before and after import.
<b>FPM Validation Activity Center: Contact Reports to Steps/Interactions</b>	Activity Center's Contact reports and Tasks map to Steps/Interactions. Additional imports relate Contact Reports to Proposals, Tasks, and other Contact Reports by populating interaction attributes in CRM. This output condenses six imports into one review file.

## 5 CRM Business Practice after Equalization

After CRM opportunity and step/interaction records have been sent to FPM and made "editable," all updates should be made in FPM, not in CRM. Updates made in FPM will over-write data in CRM, but updates in CRM will not transfer to FPM for "editable" records. The following tables specify data points that are "owned" by FPM vs. CRM.

### 5.1 CRM Data Maintained in FPM

The following data points may be initialized in CRM or in FPM. Users should not make updates or additions to the following data points in CRM for records that are "editable" in the FPM platform.

CRM Field	Fields	Notes
<b>Opportunities</b>	FPM Proposal Name Attribute Opportunity Type Opportunity Status Ask Amount Ask Date Response Date Expected Ask Amount Expected Ask Date FPM Expected Amount Attribute FPM Expected Date Attribute FPM Proposal School/Unit Attribute FPM Proposal Project of Interest Attribute FPM Proposal Funding Type Attribute FPM Proposal Campaign Project Attribute	Once an Opportunity record becomes an "editable" Proposal in FPM, users should only use FPM to update these fields.
<b>Opportunity Designations</b>	Funding Method	FPM's "Proposal Funding Type" maps to CRM's Funding Method on Opportunity Designation records under the Opportunity.  The batch validates that at least one Opportunity Designation has the incoming

CRM Field	Fields	Notes
		<p>Funding Method already applied. If this is not true then:</p> <ol style="list-style-type: none"> <li>1. If there are no Opportunity Designations, add one with the Funding Method populated from the FPM value.</li> <li>2. If there is only one Opportunity Designation, update the Funding Method to match FPM.</li> </ol> <p>If there are multiple Opportunity Designations and none of them have the incoming Funding Method applied, report an exception in validation so that the user can update CRM to include the incoming funding method on one or more Opportunity Designation records.</p>
<b>Opportunity Solicitors</b>	Opportunity Solicitor	Opportunity Solicitors are selected from the fundraisers on the Prospect Plan including Primary Manager, Secondary Manager, and Secondary Solicitor.
<b>Prospect Plan Secondary Solicitor</b>	Fundraiser Role Start Date End Date	FPM can add and remove Secondary Solicitor records on the Prospect Plan Secondary Solicitors object in order to support the Opportunity Solicitors list.
<b>Steps/Interactions</b>	Constituent Owner Status Contact Method Expected Date Actual Date Prospect Plan FPM Proposal ID Attribute FPM Contact Report School/Unit FPM Contact Report Project of Interest Summary/Objective	Once a Step/Interaction record becomes an "editable" Contact Report in FPM, users should only use FPM to update these fields.

CRM Field	Fields	Notes
	Comment	

## 5.2 CRM Data with Hybrid of CRM and FPM Maintenance

There are some data points that CRM technically "owns" while FPM can add-to, but not remove or change existing records.

CRM Object	Fields	Notes
<b>Opportunities</b>	Lookup ID	<p>Opportunities created in CRM have an Opportunity Lookup ID created by CRM.</p> <p>Opportunities created in FPM have a Proposal ID created by FPM and loaded into CRM's Opportunity Lookup ID</p> <hr/> <p><b>Note</b> — Opportunity Lookup IDs cannot be altered in FPM or CRM through front-end access.</p>
<b>Interactions</b>	Lookup ID	<p>Steps and Interactions created in CRM have an Interaction Lookup ID created by CRM.</p> <p>Contact Reports and Tasks created in FPM have IDs created by FPM and loaded into CRM's Interaction Lookup ID.</p> <hr/> <p><b>Note</b> — CRM users should NOT edit Interaction Lookup IDs in CRM, even though this feature is available. Editing an Interaction Lookup ID could orphan records that are "editable" in FPM. The Lookup ID is required to sync Contact Reports and Tasks with CRM Interactions.</p>
<b>Prospect Plan Sites</b>	Site	<p>FPM can add a Site to the Prospect Plan Sites object from the Proposal School/Unit value.</p> <p>FPM cannot remove Sites from the Prospect Plan Sites object.</p>
<b>Opportunity Funding Types</b> <b>Prospect Funding Internets</b>	Funding Type Funding Interest	<p>FPM can add Funding Types to Opportunities, which may also include adding Funding Interest on the CRM Prospect record.</p> <p>FPM cannot remove Funding Types from Opportunities</p>
<b>Opportunity Campaigns</b>	Campaign	FPM can add a Campaign to the Opportunity Campaigns list, but cannot remove Campaigns.

## 5.3 CRM Data Maintained in CRM

Most data sent to FPM from CRM remains under the ownership of CRM. The following data points are worth noting, as this connector requires them to be un-editable in FPM.

CRM Object	Fields	Notes
<b>Prospect Plans</b>	Lookup ID Name Stage Start Date End Date Primary Manager Secondary Manager	Prospect Plans are created in CRM and transfer to FPM as non-editable Prospects. FPM users cannot add to CRM's prospect plans, nor adjust prospect plan data.  <b>Note</b> — Prospect Plan Lookup IDs cannot be altered in CRM through front-end access.
<b>Prospect</b>	Classification	CRM's Prospect constituents inform some fields in FPM that are not editable on the FPM Prospect record.
<b>Constituent</b>	Lookup ID First Name Last Name	CRM Constituents/FPM Entities are maintained in CRM only. FPM cannot add Constituents to CRM, nor adjust Constituent data.
<b>Constituency</b>	Constituency	CRM constituencies determine the Staff available in FPM. FPM cannot add constituencies to CRM constituents.
<b>Prospect Plan Additional Participants</b>	Constituent Role	FPM users cannot add participants to prospect plans.
<b>Opportunity Designations</b>	All fields except Funding Method	Opportunity Designation fields are configurable to client business practice.  Funding Method is the only field from Opportunity Designations that is integrated with FPM. FPM can overwrite the Funding Method on a single Opportunity Designation record without touching other fields on the record.