LO-CRM Connector User Guide

Version 4

ABOUT THIS DOCUMENT

The **LO-CRM Integration Solution** is a bi-directional, API-based data transfer between **Blackbaud CRM** and **Luminate Online**. It includes information related to constituents, revenue, events, and communications. The current version of the **LO-CRM Integration Solution**, Version 4.0, is considered the "baseline" integration. This document reflects specific configuration and functional design included in the standard, baseline **LO-CRM Integration Solution**. This document is current for Version 4.0.39 of the **LO-CRM Integration Solution** as of January 2024.

Document Terminology

Term	Description
Blackbaud CRM	A constituent relationship management database system developed by **Blackbaud**. In this document, **Blackbaud CRM** will also be referred to as **BBCRM**.
Luminate Online	An online fundraising solution designed to maximize constituent engagement and facilitate email marketing, fundraising, and event management. In this document, **Luminate Online** will also be referred to as **LO**.
LO-CRM Integration Solution	A **Blackbaud CRM** solution utilizing **Luminate Online's** Web Services (LWS) Application Program Interface (API) library to enable a sync of information between the two systems.
Sync Process	A business process in **Blackbaud CRM** that must be run in order to pass new and updated information between the two systems.
Query Import	A business process in **Blackbaud CRM** that must be run after the Revenue sync processes in order to bring staged transactions into Revenue batches.
Sync Queue	A queue configured using standard **Blackbaud CRM** functionality that will process all of the sync processes and query imports in the recommended order.
TeamRaiser	An online peer-to-peer fundraising event tool that allows constituents to register for events, form teams, and maintain personal webpages to conduct fundraising.
Calendar Event	A standard event to be displayed in **Luminate Online** and potentially accept online registrations. These may be open attendance, RSVP-based, or ticketed.
Installment Plan	A donation form with an installment plan donation level enables donors to specify a total gift amount and arrange equal payments toward that amount.
Sustaining Gift	A donation form with a sustainer donation level enables donors to give a gift of a specific amount over a certain time period that ends on a specific date (or forever without an end date).

Integration Solution Overview

Area	Direction	Details
Constituents	LO ←→ BBCRM	New constituents and constituent updates can sync bi-directionally between **Blackbaud CRM** and **Luminate Online**. Up to 10 **Luminate Online** constituent records can be associated with a single **BBCRM** constituent record. When the single **BBCRM** record is updated all associated **Luminate Online** records will be updated accordingly. A selection is used to determine which constituents will be synced from **BBCRM** to **LO**. By default, this selection includes all individuals with an email address and any organization records that were initially brought in from **LO**, but this can be changed based on preference. A "Do Not Sync" attribute can be used to exclude certain constituents from the sync on a one-off basis. All complete constituent records with a last name will sync from **LO** to **BBCRM**. Administration records are excluded from the sync. The constituent sync includes personal information, contact information, and global opt-ins and opt-outs. In addition to the fields transferred back-and-forth, there is additional functionality available in the sync for duplicate management and the creation of **LO** groups
TeamRaiser Events	LO → BBCRM	TeamRaiser Events are brought over as events in **BBCRM**. The participation types are brought over as registration options. Teams are brought over as team fundraising teams, with both a team record and a constituent group record created. Participants are brought over as registrants on the event, associated with the team (if applicable). The team fundraising functionality is leveraged to reflect the fundraising totals and goals for all teams and registrants.
Calendar Events	LO → BBCRM	Calendar Events are brought over as events in **BBCRM**. For RSVP events, respondents are brought over as **BBCRM** registrants with an "RSVP" registration option. For ticketed events, ticket purchasers are brought over as **BBCRM** registrants with a registration option corresponding to their ticket type.
Revenue	LO → BBCRM	Standard gifts from **LO** are brought over as donations in **BBCRM**. Sustaining gifts from **LO** are brought over as recurring gifts or pledges (to be determined via configuration) and sustaining gift payments are applied to that open commitment. Recurring gift updates from **LO** are brought over as Recurring Gift statuses or amount updates.

		E-Commerce purchases are brought over with an application of "Other" and an other type of "Luminate Online store purchase." Information on the product(s) purchases is included on the Revenue record. TeamRaiser registrant payments are brought over as payments applied to the event registration. TeamRaiser gifts are brought over as standard donations, with a recognition credit for the appropriate team or participant. Calendar Event ticket purchases are brought over as payments applied to the event registration. All Revenue is brought into a batch, which can be set to automatically commit or manually review. If the Designated Giving functionality in **LO** is being used, the "Accounting Code" field can be used to automatically populate the correct designation in **BBCRM**. Cross-references and batch defaults can also be leveraged to determine the designation, appeal, and many other fields available in a standard Enhanced Revenue Batch. The baseline integration will process refunds but not other revenue updates. If additional updates are needed, gifts must be manually adjusted in **BBCRM**.
Survey Responses	LO → BBCRM	Survey responses are brought over to new custom fields in **BBCRM**. This includes both general survey responses and application survey responses (i.e. TeamRaiser registration questions). By default, these are surfaced on the constituent's record. Data lists can be configured to surface this information elsewhere in the system, such as on the registrant record.
Email Interactions	LO → BBCRM	Email campaigns, messages, deliveries, and recipients are brought over to new custom fields in **BBCRM**. The email campaigns, messages, and deliveries are surfaced in a new page under the Marketing and Communications area in **BBCRM**. The email recipient data is surfaced on the constituent's record.
Email Interests	LO → BBDW	Interests, often referred to as opt-ins and opt-outs, are brought into the **Blackbaud Data Warehouse** (**BBDW)**. These can be surfaced on the constituent's record, based on preference.
Premium Log	LO → BBCRM	Brings over specific benefit information from the Premium Log API. These can be synced to benefits on a revenue transaction, based on preference.
Personal Fundraising Sync	LO → BBCRM	The Personal Fundraising Campaign Sync, Personal Fundraising Champion Sync, and Personal Fundraising Gift Sync are all one-way sync processes from **Luminate Online** to **Blackbaud CRM**. The Personal Fundraising Campaign Sync will bring over information on the campaign. The Personal Fundraising Champion Sync will associate the champion with the campaign. The Personal Fundraising Gift Sync will bring over the associated revenue transactions. A code table entry of “Personal Fundraising” must be added to the Revenue Recognition Credit Type Code Table. The champion will then receive “Personal Fundraising” recognition

		credit on the transactions. An attribute can be also added to the revenue transactions with the name of the campaign through a query import mapping, based on preference.
Advocacy Sync	LO → BBCRM	The Advocacy Alert Sync and Advocacy Response Sync are one-way sync processes from **Luminate Online** to **Blackbaud CRM**. They bring over alerts and responses from **Luminate Online** to the associated **CRM** constituent's record.
Center Sync	LO → BBCRM	The Center Sync and Center Member Sync are one-way sync processes from **Luminate Online** to **Blackbaud CRM**. They bring over Center information and associate that center information with the associated **BBCRM** Center Members.

Sync Processing

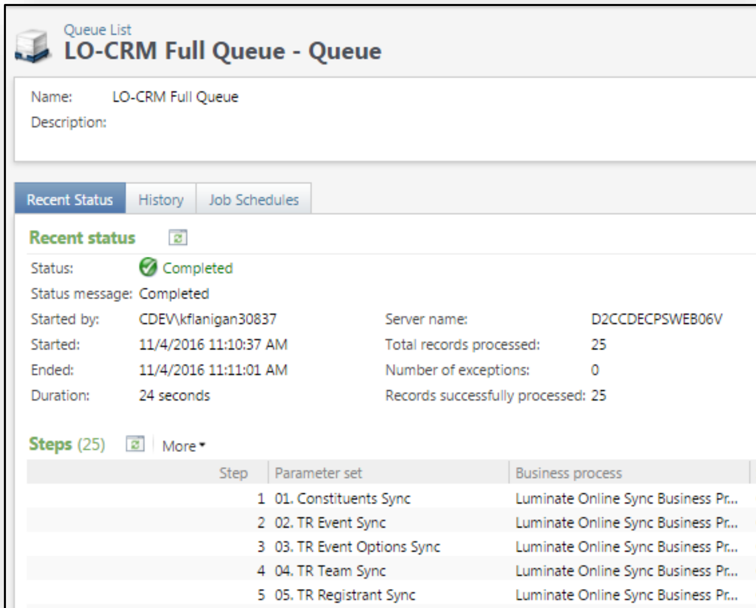
The **LO-CRM Integration** is made up of several separate sync processes, each of which bring over different record types. The baseline integration is currently comprised of 22 standard sync processes and 15 optional processes.

1. Constituent Sync
2. TR Event Sync
3. TR Event Options Sync
4. TR Team Sync
5. TR Company Sync (Optional)
6. TR Registrant Sync includes TR Registration Payment Child Sync
7. Calendar Event Category (Optional)
8. Calendar Event Sync
9. Calendar Event Ticket Type Sync
10. Calendar Event Registrant includes Calendar Event Ticket Purchase Child Sync
11. Ecommerce Products Sync
12. Designees
13. Campaigns
14. Donation Forms
15. Surveys
16. Merchant Account (Optional)
17. Donation Sync includes Recurring Gift Master Child Sync
18. TR Gift Sync
19. Designated Transaction Sync
20. Cross Reference Sync
21. Ecommerce Revenue Sync
22. LO Interests (BBDW) Sync
23. LO Interest Events (BBDW) Sync

24. Constituent Interests Sync
25. Constituent Login Info Sync
26. Premium Log (Optional)
27. Advocacy Group (all Optional, but should have full group in order)
    a. Advocacy Alert
    b. Advocacy Response
28. Email Information Group (all Optional, but should have full group in order)
    a. Email Campaigns Sync
    b. Email Campaign Messages Sync
    c. Email Campaign Deliveries Sync
    d. Email Campaign Recipients Sync
29. Multi-Center Group (all Optional, but should have full group in order)
    a. Center
    b. Center Member
30. Personal Fundraising Group (all Optional, but should have full group in order)
    a. Personal Fundraising Campaigns
    b. Personal Fundraising Gift
    c. Personal Fundraising Champions

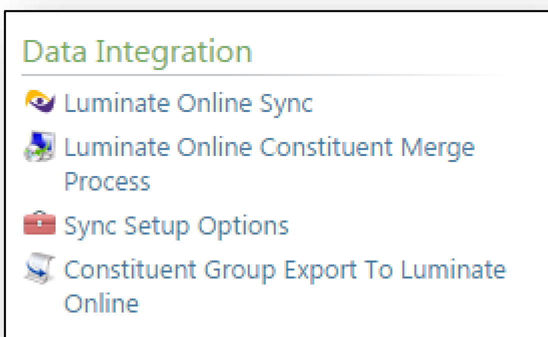
Although each process can be run on a one-off basis if needed for troubleshooting, they should be run as part of a queue. This ensures that all processes are run in the correct order, as many record types are dependent on one or more other processes having completed first. For example, the TeamRaiser Participation Type records (i.e. registration options) cannot be created in **BBCRM** until the TeamRaiser Event has been created.

The queue is created using standard **BBCRM** functionality, which should be scheduled to run automatically. Different queues can be created if there is a need to process certain information more frequently than other data (i.e., TeamRaiser queue, Donations queue). In addition to the sync processes, the queue should also include the necessary Query Import processes.

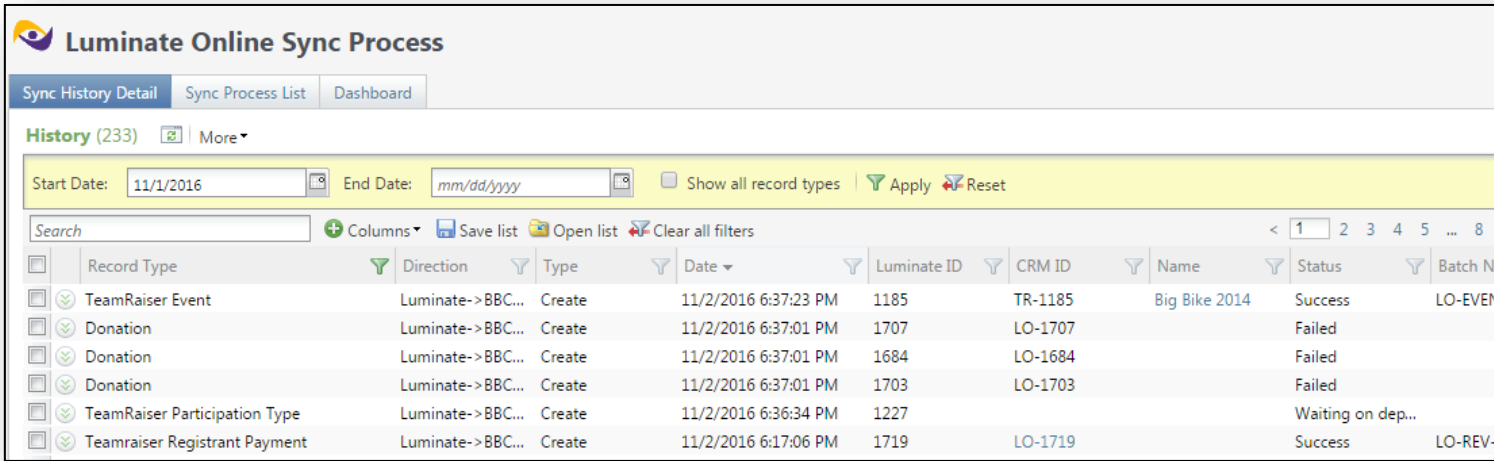


Sync Management

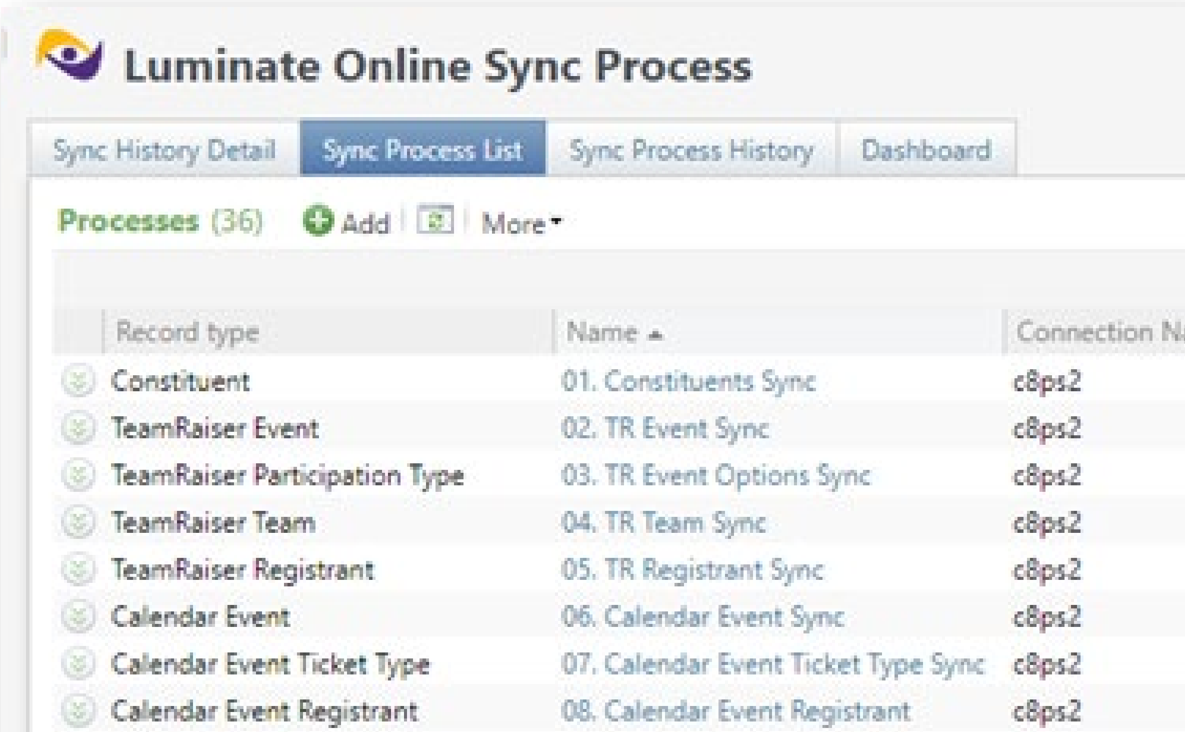
When the solution is installed, a new **Data Integration** task group will appear in the Administration functional area:



The first task, **Luminate Online Sync**, is a link to the Luminate Online Sync History page. This first tab of this page, *Sync History Detail*, provides information on all of the records that have been processed by the **LO-CRM Integration**, including the BBCRM ID, LO ID, and status. A database administrator will be responsible for monitoring this list and addressing any exceptions that arise.

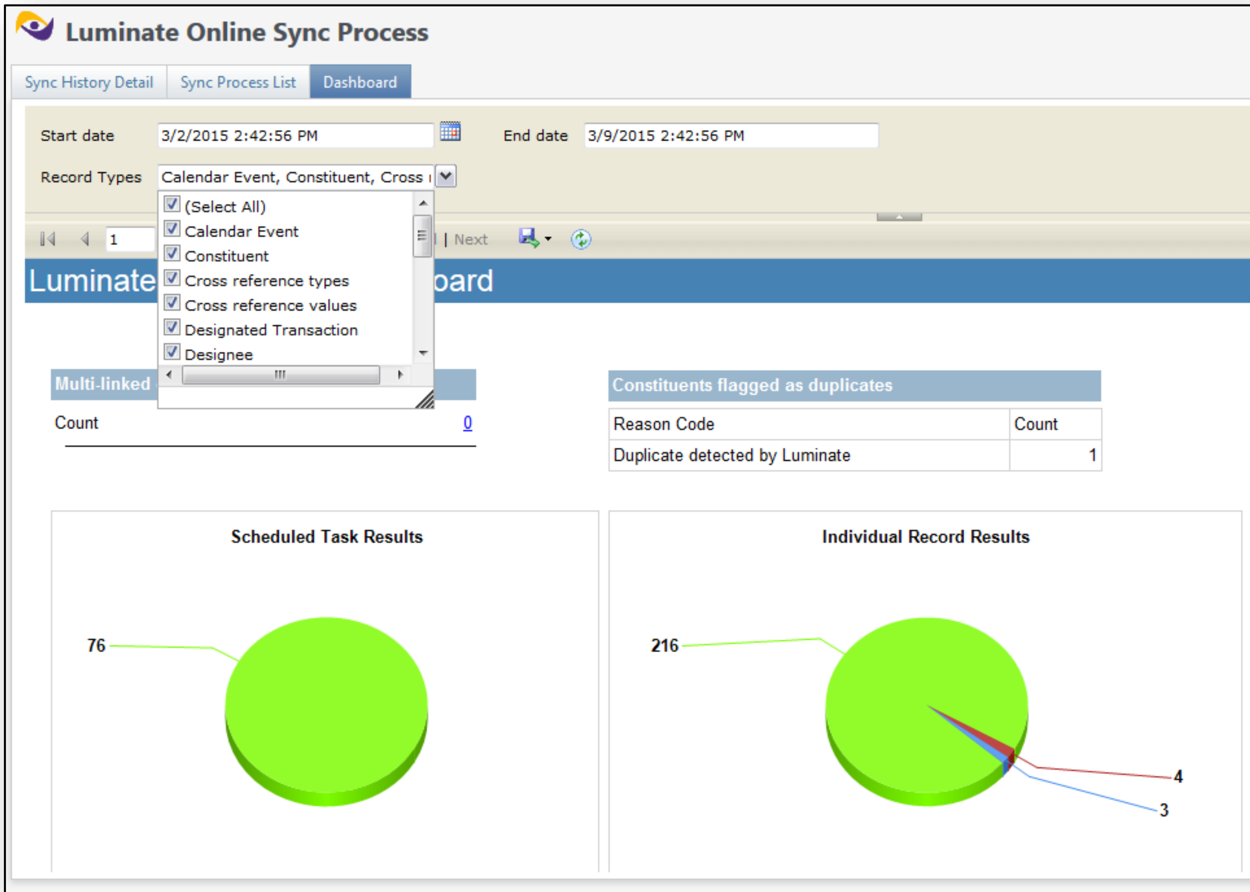


The second tab of this page, *Sync Process List*, lists all of the sync processes included in the baseline **LO-CRM Integration Solution**.



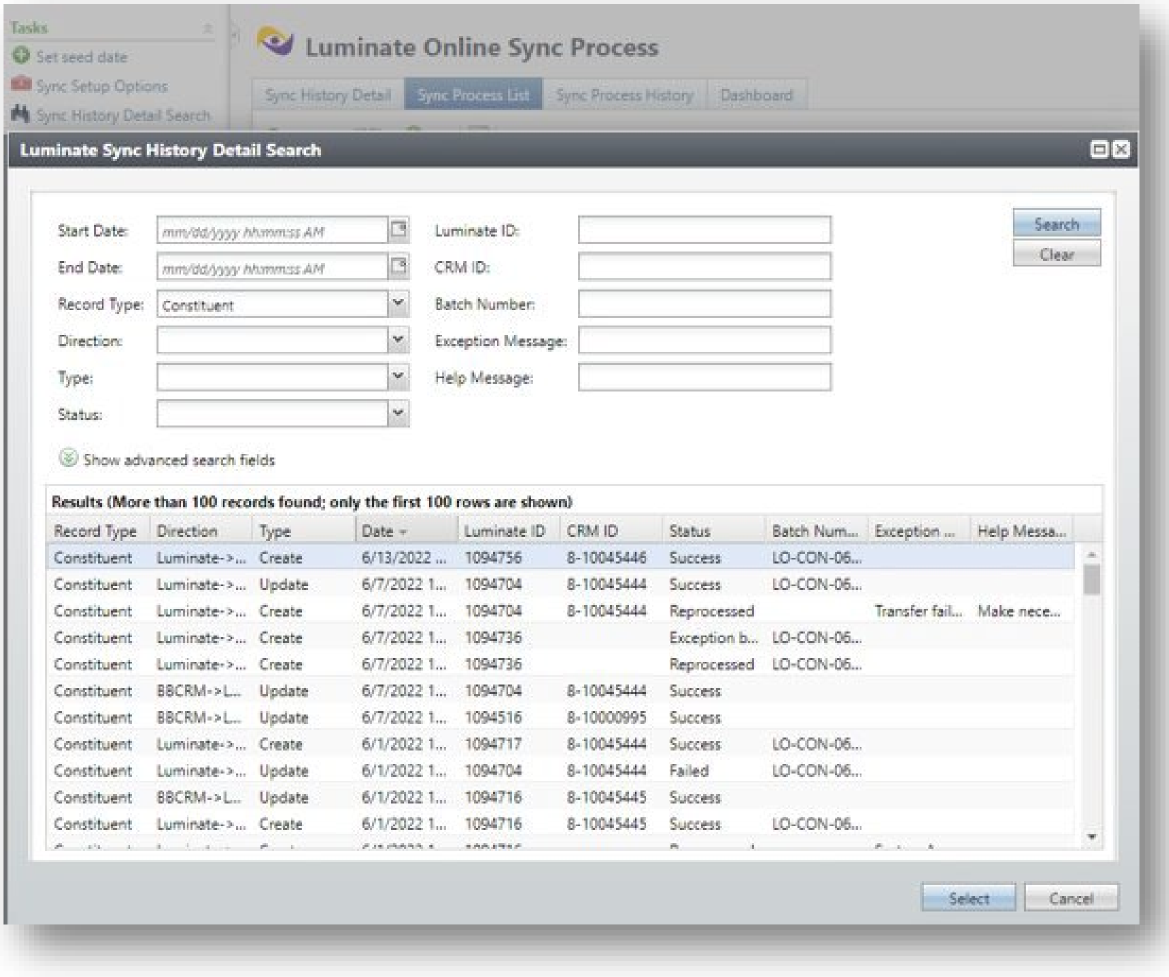
The *Sync Process History* tab lists all of the history of each time the sync processes have been run. This can be useful in reviewing and identifying processes that had exceptions.

The *Dashboard* tab contains a dashboard to surface details regarding the status of the various syncs. The dashboard can be filtered by date range and record type parameter.



There is a **Sync History Detail Search** task under the Task group of the Luminate Online Sync Process page. This task allows you to search for records that have synced by Date, Record Type, Direction, Type, Status, Luminate ID, BBCRM ID, Batch Number, Exception Message, and Help Message.

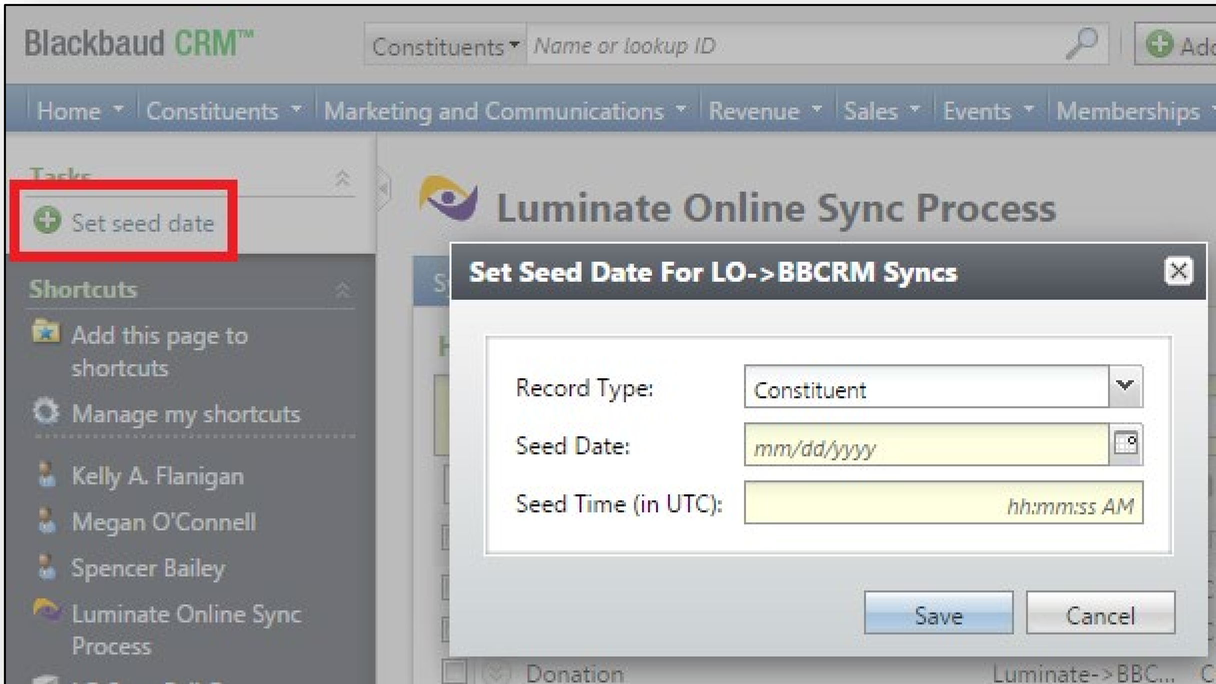
Advanced search fields allow for further searching by Constituent ID, Calendar Event ID, Calendar Event RSVP ID, TeamRaiser Team ID, TeamRaiser Sync Processer Event ID, and TeamRaiser Registration ID.



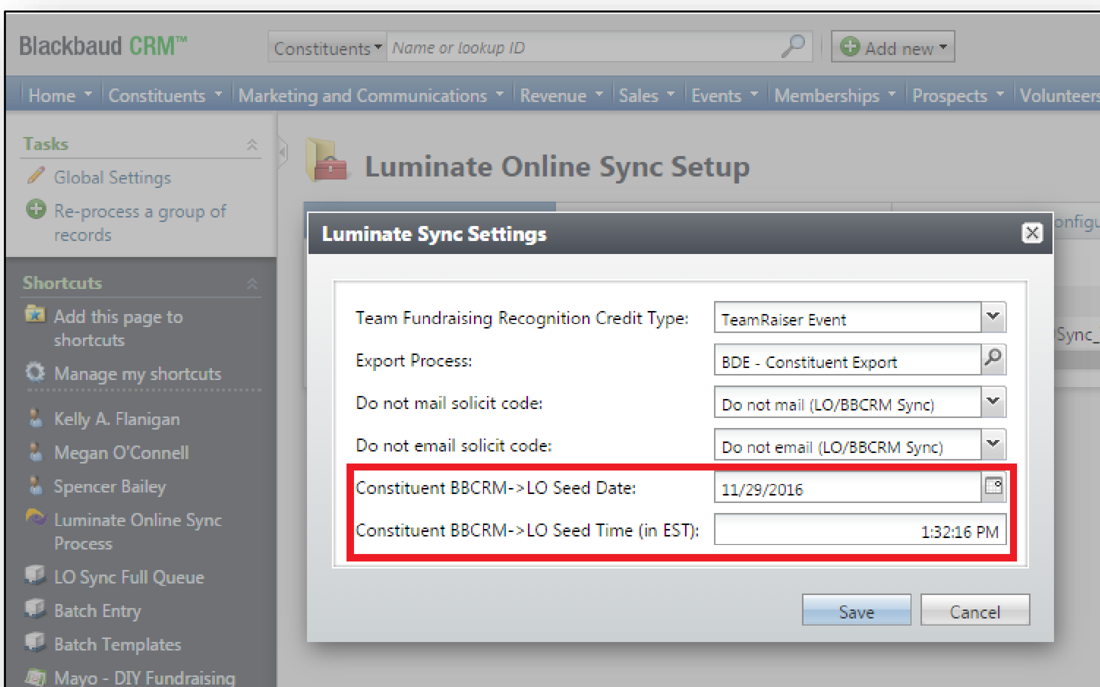
Seed Dates

Each time a sync process runs, it requests records from each system that have been created or updated (if applicable) since the last time the sync ran. The last run date or "seed date" is maintained separately for each record type and each system. The seed date for data coming from **Luminate Online** can be set on the "Set seed date" task on the Luminate Online Sync Process Page.

The seed dates should not need to be manually updated after the initial equalization, unless required for troubleshooting purposes.



The seed date for constituents going from **BBCRM** to **Luminate Online** is set on the *Global Settings* task of the Luminate Online Sync Setup page.

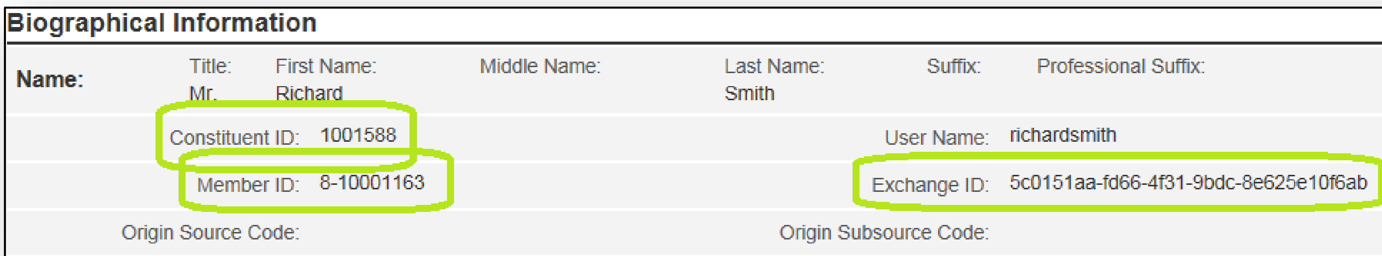


CONSTITUENTS

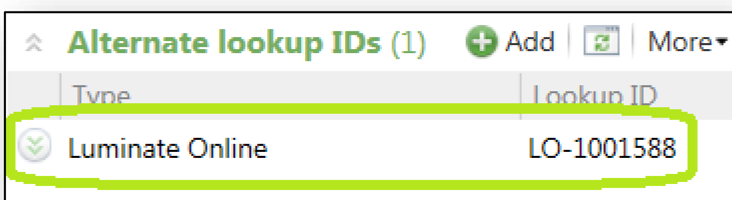
Overview

The Constituent sync process is currently the only bidirectional sync between **Blackbaud CRM** and **Luminate Online**. New and updated personal information, contact information, and global opt-ins and opt-outs are passed between **LO** and **BBCRM**.

The **LO-CRM Integration** relies on three ID fields to link a **LO** constituent to the appropriate **BBCRM** constituent. In **Luminate Online**, the Member ID field is populated with the BBCRM Lookup ID, and the Exchange ID is populated with the BBCRM System Record ID (GUID).



In **BBCRM**, an alternate lookup ID with the type "Luminate Online" is added to any constituent linked to **Luminate Online**.



Note — When a new constituent is created in **LO** and then brought into **BBCRM**, the sync process must be run twice before the Member ID and Exchange ID are populated on the constituent record in **Luminate Online**. The first run of the sync creates the constituent in **BBCRM**, but does not update **Luminate Online** with the Member ID and Exchange ID. An attribute of "Luminate Online - Update MemberID & ExchangeID" is added to the new constituent which causes the next sync process to push the IDs into **Luminate Online**.

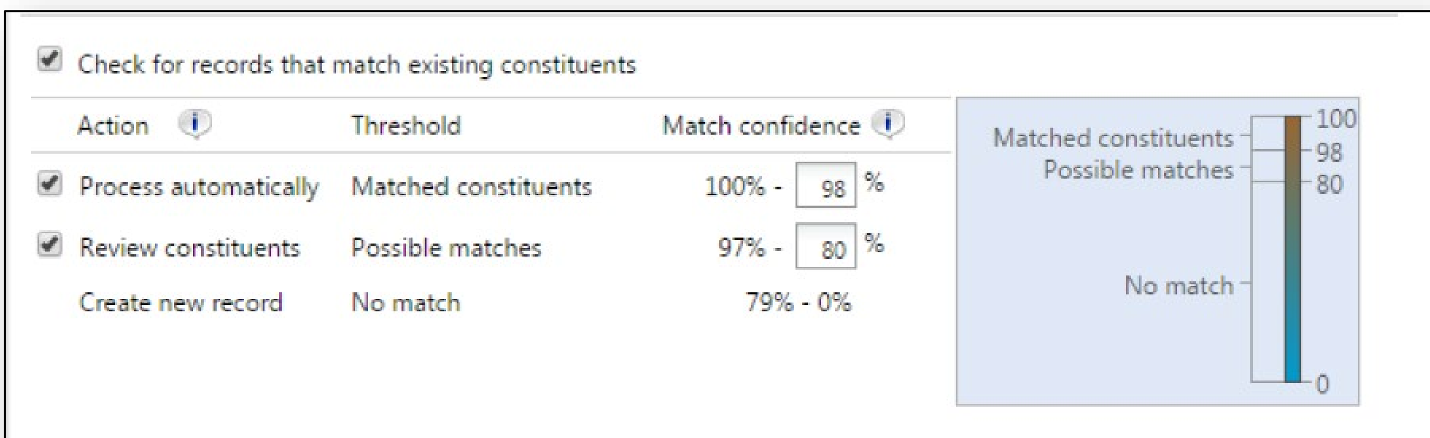
Luminate Online → Blackbaud CRM

New and updated constituent information is brought from **LO** into a **BBCRM** batch. All constituents in **Luminate Online** will sync to **BBCRM**, with the following exceptions.

- Administrator users are not synced, as **Luminate Online** does not allow updates of admin users through the API.
- Constituents with no last names are excluded from the sync because **BBCRM** requires this field to be populated in order to create a constituent record.

Any constituent who falls into one of these two groups will appear as failures in the Sync History Log whenever they are triggered to re-sync.

The sync process uses the matching settings configured on the "LO Sync - Constituents" batch template when bringing in new constituents from **Luminate Online**. These settings can be adjusted as needed without any impact on the sync. **Blackbaud** recommends starting with the matching setting of 98-100% to process automatically and 80-97% to review constituents.



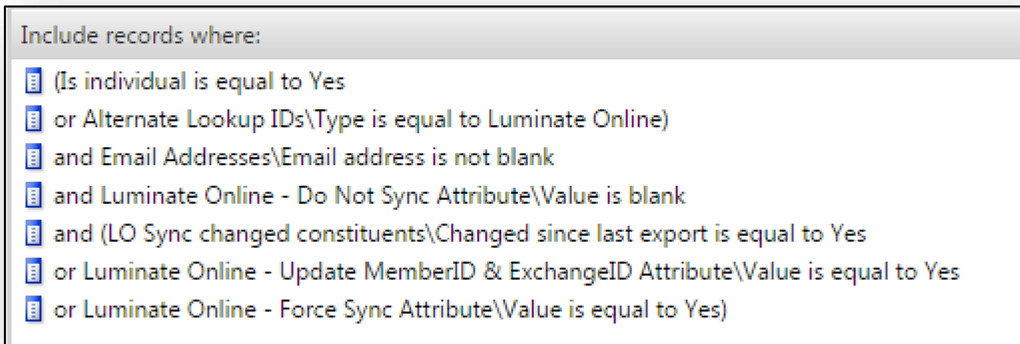
Exception batches can arise due to potential duplicates, depending on the above configuration. Occasionally, an error with the constituent data entered in **LO** will cause an exception as well. The sync works best if exception batches are addressed quickly, so it is recommended that these batches are reviewed at least once a day.

Note — Some users prefer to uncheck the "review constituents" option altogether, to avoid any exception batches which might hold up registrant and revenue processing. The standard **BBCRM** duplicate processing is then used to merge any duplicates that were created by the process. See the *Constituent Merges* section for more information.

Blackbaud CRM → Luminate Online

New and updated constituent information is brought into **LO** from **BBCRM** through an export process, which leverages a query and export definition. Each time the sync runs, it checks to see if **BBCRM** constituents that fall into the corresponding query have been added or updated after the sync last ran. The sync then runs an export process to generate a list of those constituents and uploaded them to **Luminate Online**.

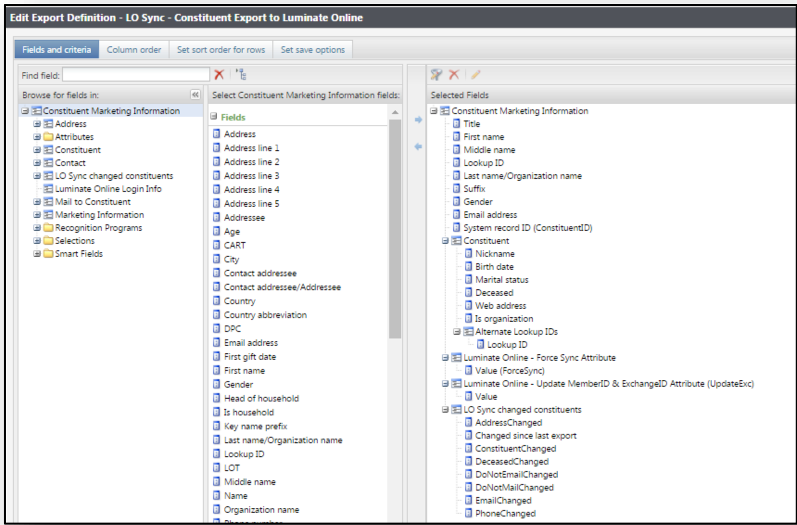
When the sync is installed, a default query named "LO Sync - Constituent Export" is created.



The query uses a custom query field ("LO Sync changed constituents\Changed since last export") to determine which constituents have been recently created or updated. This query excludes any changes made by the sync, to avoid unnecessary round trips. By default, this query will pull all individuals with an email address and without the "Do Not Sync" attribute. The query also includes organizations with an LO alternate lookup ID (meaning they have previously been synced from LO), with an email address and without the "Do Not Sync" attribute.

Note — This query can be changed as needed. However, it is strongly recommended not to change or remove the bottom five default criteria. These restrictions are critical for proper sync operations. The logic for "(IsIndividual is equal to Yes or Alternate Lookup IDs\Type is equal to Luminate Online)" can be changed if needed.

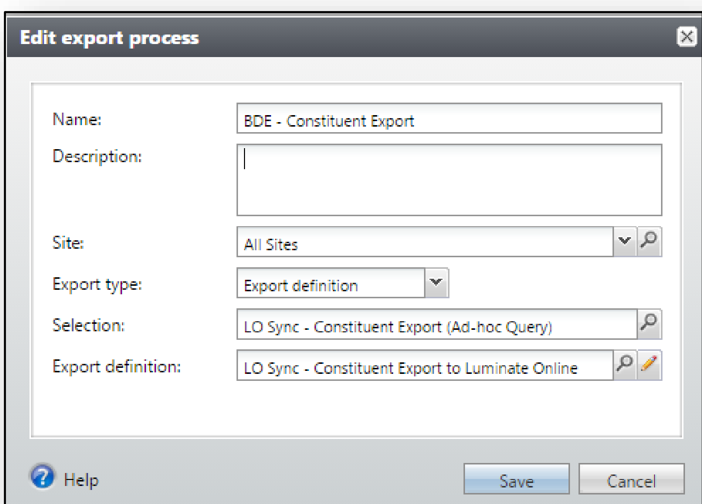
When the sync is installed, a default export definition named "LO Sync - Constituent Export to Luminate Online" is created.



Additional fields can be added to the export definition and linked to **Luminate Online** fields through the custom field mappings task on the sync process. For more information, see the *Custom Field Mappings* section.

Note — The default fields in this export definition should never be renamed. This will immediately break the constituent sync.

When the sync is installed, a default export process is created named "BDE - Constituent Export," leveraging the query and export definition detailed above.



This process is called directly by the sync and should not be modified. Old process results can be deleted via the standard Business Process Output Delete global change without any impact on the **LO-CRM Integration**.

The sync modularizes the data sent up from **BBCRM** to **Luminate Online**. This means that if a constituent's phone number was changed, but all other data remained the same, only the phone numbers will be updated in **Luminate Online**. The data is grouped as follows:

- Addresses
- Phones
- Emails
- Deceased Flag
- Do Not Mail Solicit Code
- Do Not Email Solicit Code
- General Constituent Info (everything not listed in the previous bullets - name, nickname, gender, marital status, etc.)

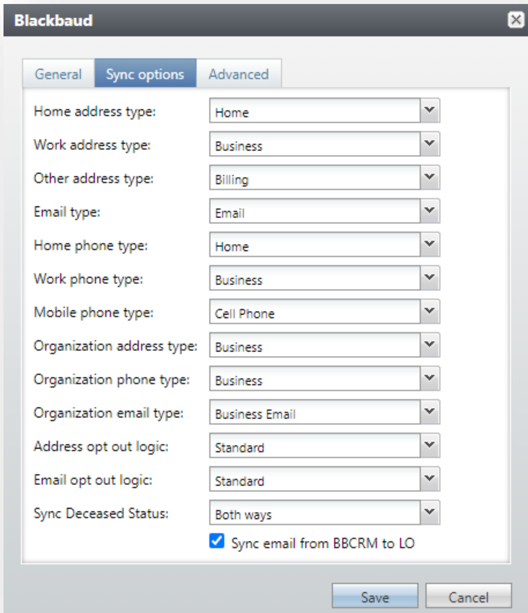
Note — A constituent can always be flagged to do a "full update" into **Luminate Online** by adding the "Luminate Online – Force Sync" attribute to the constituent in **BBCRM.** That will push all fields up to **Luminate Online** on the next run of the sync, regardless of their last update date.

Sync Process

The **Constituent Sync Process** has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Constituent Sync).

The default options under the *General* tab should not be changed. These link the Constituent Sync Process to the appropriate export process and batch template.

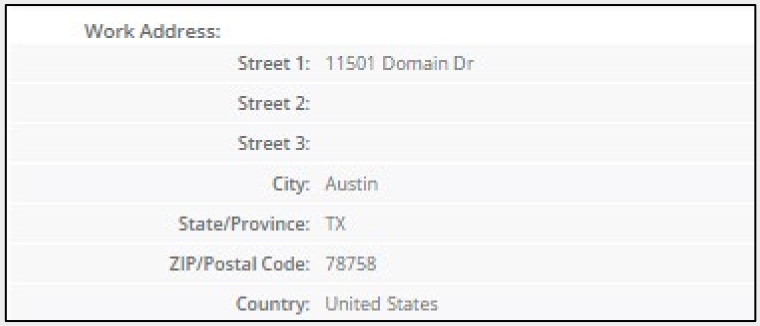
Under the *Sync Options* tab, there are several configuration options available. All of these options will need to be configured when the **LO-CRM Integration** is first installed in a **BBCRM** environment.



<table>
<tr><th>Configuration Name</th><th>Options</th><th>Description</th></tr>
<tr><td>Home address type</td><td>Values from the "Address Type" code table in Blackbaud CRM</td><td>The BBCRM address type to be assigned to any new addresses coming in from the "Address" fields in Luminate Online. Additionally, any new addresses added with this configured type in BBCRM will transfer into the "Address" fields of Luminate Online.

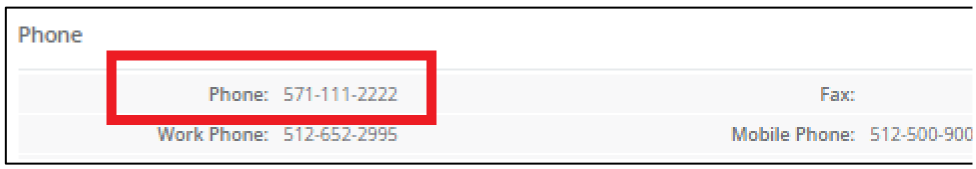
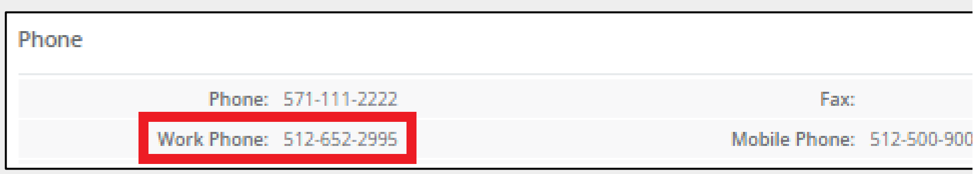
Note: Some environments may not have the "Home address" fields enabled in LO, which means the section shown above will not appear on the Constituent Record. These can be enabled in the Database Configuration area of Luminate Online, if desired. A type must be specified in this configuration area of Blackbaud CRM, but these fields do not need to be enabled in Luminate Online order for the Constituent Sync to successfully complete.</td></tr>
</table>

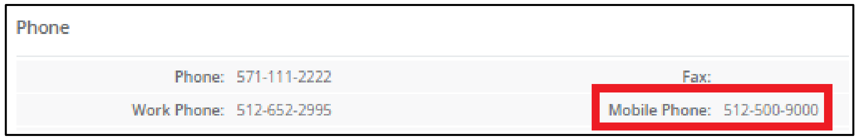
<table>
<tr><td>Work address type</td><td>Values from the "Address Type" code table in Blackbaud CRM</td><td>The BBCRM address type to be assigned to any new addresses coming in from the "Work address" fields in Luminate Online. Additionally, any new addresses added with this configured type in BBCRM will transfer into the "Work address" fields of Luminate Online.



Note: Some environments may not have the "Work address" fields enabled in LO, which means the section shown above will not appear on the Constituent Record. These can be enabled in the Database Configuration area of Luminate Online, if desired. A type must be specified in this configuration area of Blackbaud CRM, but these fields do not need to be enabled in Luminate Online order for the Constituent Sync to successfully complete.</td></tr>
<tr><td>Other address type</td><td>Values from the "Address Type" code table in Blackbaud CRM</td><td>The BBCRM address type to be assigned to any new addresses coming in from the "Other address" fields in Luminate Online. Additionally, any new addresses added with this configured type in BBCRM will transfer into the "Other address" fields of Luminate Online.

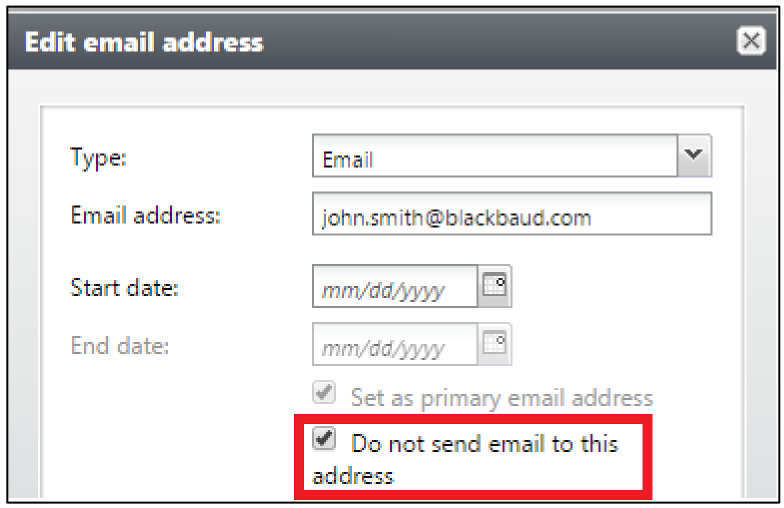
Note: Some environments may not have the "Other address" fields enabled in LO, which means the section shown above will not appear on the Constituent Record. These can be enabled in the Database Configuration area of Luminate Online, if desired. A type must be specified in this configuration area of Blackbaud CRM, but these fields do not need to be enabled in Luminate Online order for the Constituent Sync to successfully complete.</td></tr>
<tr><td>Email type</td><td>Values from the</td><td>The BBCRM email address type to be assigned to any email addresses coming in from Luminate Online.</td></tr>
</table>

	"Email Address Type" code table in Blackbaud CRM	
Home phone type	Values from the "Phone Type" code table in Blackbaud CRM	The BBCRM phone type to be assigned to any new addresses coming in from the "Phone" field in **Luminate Online**. Additionally, any new phone numbers added with this configured type in **BBCRM** will transfer into the "Phone" field of **Luminate Online**.  **Note**: Some environments may not have the "Phone" field enabled in **LO**, which means the field shown above will not appear on the Constituent Record. This can be enabled in the Database Configuration area of **Luminate Online**, if desired. A type must be specified in this configuration area of **Blackbaud CRM**, but the field does not need to be enabled in **Luminate Online** order for the Constituent Sync to successfully complete.
Work phone type	Values from the "Phone Type" code table in Blackbaud CRM	The BBCRM phone type to be assigned to any new addresses coming in from the "Work phone" field in **Luminate Online**. Additionally, any new phone numbers added with this configured type in **BBCRM** will transfer into the "Work phone" field of **Luminate Online**.  **Note**: Some environments may not have the "Work phone" field enabled in **LO**, which means the field shown above will not appear on the Constituent Record. This can be enabled in the Database Configuration area of **Luminate Online**, if desired. A type must be specified in this configuration area of **Blackbaud CRM**, but the field does not need to be enabled in **Luminate Online** order for the Constituent Sync to successfully complete.
Mobile phone type	Values from the "Phone Type" code table in	The BBCRM phone type to be assigned to any new addresses coming in from the "Mobile phone" field in **Luminate Online**. Additionally, any new phone numbers added with this configured type in **BBCRM** will transfer into the "Mobile phone" field of **Luminate Online**.

	Blackbaud CRM	 **Note**: Some environments may not have the "Mobile phone" field enabled in **LO**, which means the field shown above will not appear on the Constituent Record. This can be enabled in the Database Configuration area of **Luminate Online**, if desired. A type must be specified in this configuration area of **Blackbaud CRM**, but the field does not need to be enabled in **Luminate Online** order for the Constituent Sync to successfully complete.
Organization address type	Values from the "Address Type" code table in Blackbaud CRM	The BBCRM address type to be assigned to any new addresses coming in from the "Address" fields in **Luminate Online**, <u>when the constituent is flagged as an organization</u> (i.e. Boolean50 is checked). Additionally, any new addresses added with this configured type in **BBCRM** will transfer into the "Address" field of **Luminate Online** for these organization constituents. **Note** : Information entered into the "Work Address" or "Other Address" fields is not brought over for Organization constituents.
Organization phone type	Values from the "Phone Type" code table in Blackbaud CRM	The BBCRM phone type to be assigned to any new numbers coming in from the "Phone" field in **Luminate Online**, <u>when the constituent is flagged as an organization</u> (i.e. Boolean50 is checked). Additionally, any new phone numbers added with this configured type in **BBCRM** will transfer into the "Phone" field of **Luminate Online** for these organization constituents. **Note**: Information entered into the "Work Phone" or "Mobile Phone" fields is not brought over for Organization constituents.
Organization email type	Values from the "Email Address Type" code table in Blackbaud CRM	The BBCRM email address type to be assigned to any email addresses coming in from **Luminate Online**, <u>when the constituent is flagged as an organization</u> (i.e. Boolean50 is checked).
Email opt out logic:	Standard Custom	When **Standard** is selected, the global Accepts Email flag in **Luminate Online** syncs to the configured solicit code in **Blackbaud CRM**, just like the global Accepts Mail flag. When **Custom** is selected, the default behavior changes for updates to this flag coming from **Luminate Online** into **Blackbaud CRM**. In this case, if the Accepts Email flag is checked in **Luminate Online**, the "Do not send email to this address" flag is set on that specific email address in

Blackbaud CRM instead. This is a one-way sync. If that flag is checked in **Blackbaud CRM**, it will not update the Accepts Email flag in **Luminate Online**.

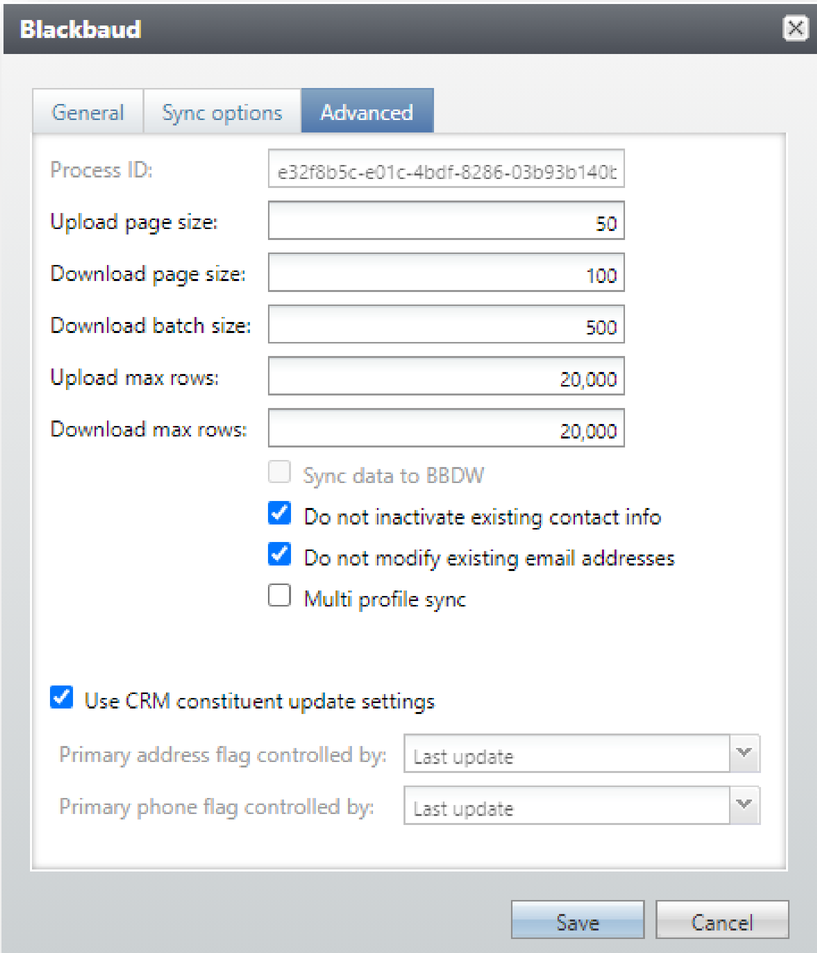
A "Do Not Email" solicit code is not applied to the constituent's record by the sync when "**Custom**" is selected. However, if the configured solicit code is added in **Blackbaud CRM**, then it will still update the "Accepts email" flag in **Luminate Online**. Additionally, when this option is selected, changes to the email status (i.e. "Hard Bounce") will no longer sync to **Blackbaud CRM**.



Note: This should be set to "Custom" for constituents that have implemented the multiple profile constituent sync.

Sync Deceased Status	Both ways	When **Both** is selected, the deceased status will sync between **LO** and **BBCRM**.
	LO> BBCRM only	When **LO>BBCRM only** is selected, the deceased status only sync from **LO** to **BBCRM**.
	BBCRM > LO only	When **BBCRM>LO only** is selected, the deceased status only sync from **BBCRM** to **LO**.
	Do not sync	When **Do not sync** is selected, the deceased status will not sync between the systems.

There are additional configuration options available under the *Advanced* tab.



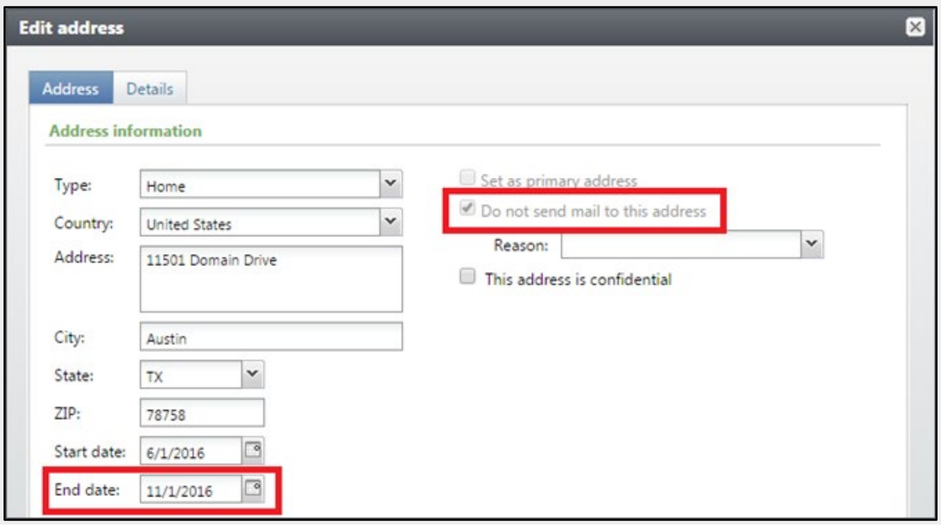
Configuration Name	Options
Download batch size	This setting is used to determine how many records will be processed in one batch and it can still be changed if needed. The minimum value is 100 and the maximum value is 500 (for performance reasons). The value should be a multiple of 100. **Blackbaud** recommends using the default value of 500.
Upload max rows	This setting is used to determine how many records will be processed from **Blackbaud CRM** to **Luminate Online** and can be changed if needed. The minimum value is 50 and the value should be a multiple of 50. **Blackbaud** recommends using the default value of 20,000.
Download max rows	The setting is used to determine how many records will be processed from **Luminate Online** to **Blackbaud CRM** and it can also be changed if needed. The minimum value is 100 and the value should be a multiple of 100. **Blackbaud** recommends using the default value of 20,000.

Do not inactivate existing contact info

If unchecked, all contact information (address, phone, or email) in **BBCRM** that was not matched with **Luminate Online** contact information would be set to inactive (contact information would receive today's date as the end date and be flagged to "do not send").

If checked, this functionality will not be applied and existing contact information will remain active.

For example, in **Blackbaud CRM**, a new constituent has been added with two "Home" addresses: Home 1 and Home 2, with Home 2 marked as the Primary in **Blackbaud CRM**. Unchecked, when the Constituent Sync process was run, Home 2 would be sent to **Luminate Online** and then Home 1 would ultimately get marked as inactive. With this setting checked, Home 2 will still be sent to **Luminate Online** but Home 1 will not be modified at all.



Do not modify existing email addresses

If unchecked, a constituent in **BBCRM** with an email address marked as primary with a type different than the email type configured in the Constituent Sync options, the Constituent Sync would add the same email address to the constituent's record in **BBCRM** with the configured email type. This causes the constituent record to have a duplicate email address with two different types in **BBCRM**.

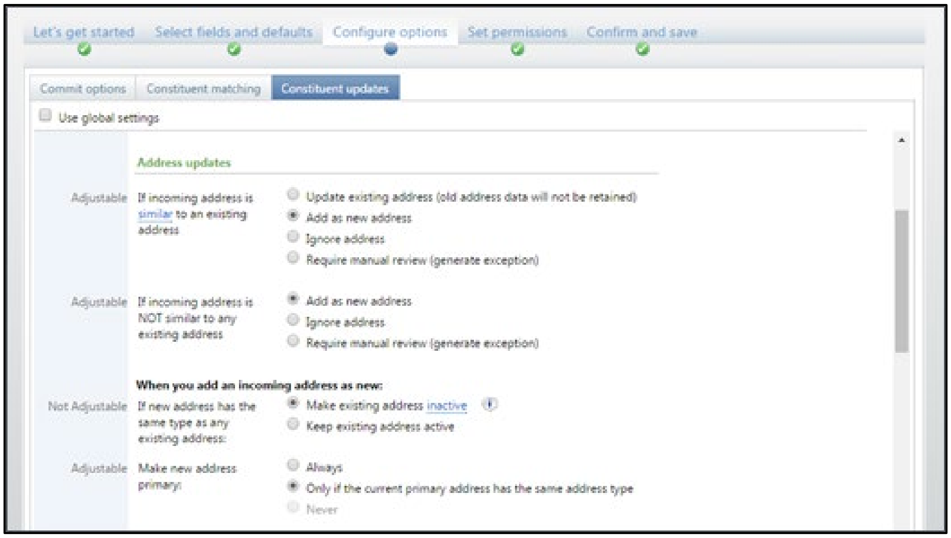
If checked, the Constituent Sync will not add an additional email address in **BBCRM** if the primary email's type in **BBCRM** does not match the email type configured in the Constituent Sync options.

Note — This setting does not work if the email opt-out logic is configured to "Custom."

Multi profile sync

Some organizations choose to allow intentional duplicate records in **Luminate Online**. For example, the same constituent may like to receive email at two different email addresses. In this case, multiple **LO** profiles would need to be linked to the same **BBCRM** constituent record. To allow this design, the Multi profile sync configuration should be checked.

	In addition to the Multi profile sync checkbox, organizations that would like to utilize this feature should also select the “Custom” email opt-out option and uncheck “Sync email from BBCRM to LO” option. If this configuration is enabled, the **Luminate Online Constituent Merge Process** should not be run. Organizations must also ensure that additional criteria of 'or Luminate Online - Update Multiple LO ProfilesAttribute\Value is not blank' filter exists on the LO constituent export query AND the "Luminate Online - Update Multiple LO Profiles Attribute" value exists on the LO Constituent Export Definition. By default, this option is unavailable for use (it is grayed out). If interested in using this functionality, **Blackbaud Support** should be contacted, so that a script can be run to make this option available.
Use BBCRM constituent update settings	The **LO-CRM Integration Solution** was developed with certain settings hard-coded. The code includes hard-coded values for the Constituent Update settings, which would usually be configured in the Constituent Update Batch Template. Below are the **LO-CRM Integration** Solution hard-coded values: • If incoming address is similar to an existing address, add as new address • If incoming address is not similar to any existing address, add as new address • If new address has the same type as any existing address, make existing address inactive • If incoming phone is not identical to any existing phone, add as new phone • If new phone has the same type as any existing phone, make existing phone inactive • If incoming email address is not identical to any existing email address, add as new email address • If new email address has the same type as any existing email address, make existing email address inactive With this setting checked, the Constituent Sync will instead use the settings configured for contact information in the “LO Sync – Constituents” batch template (either the Global Settings, if batch template is marked to use global settings, or the batch template settings) instead of the hardcoded values listed above.



This setting could possibly contradict the "Do Not Inactivate Existing Contact Info" setting detailed above. For example, if it is configured to have for similar addresses to make existing address inactive in the batch template setting, but you also have the "Do Not Inactivate Contact Info" checked. In this scenario, the sync will inactive the existing address(es) in **BBCRM**. Because of this interaction, it is important to consider these settings together when determining which configurations to use for contact information updates.

Note — When you have this checked, the primary address and primary phone controlled by settings (below) are treated as set to "Do not sync". This allows BBCRM settings to control primary flags which allows the BBCRM constituent update settings to decide the primary flags without interference.

Primary address flag controlled by **Primary phone flag controlled by**	• **Blackbaud CRM** – The contact type set to primary in **Blackbaud CRM** will remain primary regardless of any changes made in **Luminate Online**. Each time contact information is changed in **Blackbaud CRM**, the sync will overwrite **Luminate Online**'s preferred setting with the value from **Blackbaud CRM**. For example: ◦ A constituent's home phone is set to primary in **Blackbaud CRM**. An administrator updates their profile in **Luminate Online** with a new home phone, mobile phone, and sets mobile phone as the preferred value. The sync will update the phone numbers in **Blackbaud CRM**, but the home phone will remain primary. If the phone is edited in **Blackbaud CRM**, the primary phone flag in **Luminate Online** will be overwritten with the "Home" value from **Blackbaud CRM**. • **Luminate Online** – This follows the same logic as the **Blackbaud CRM** setting, except **Luminate Online** controls the primary flag. • **Last Update** – Each time the sync transfers a constituent, the primary flag from the updated system will be sent. For example:

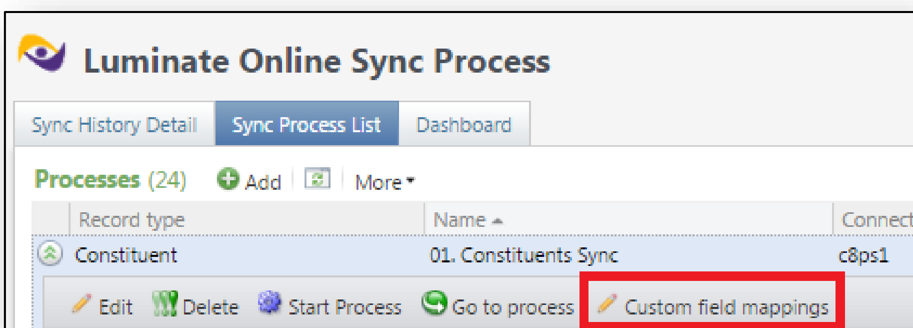
- A constituent updates their profile in **Luminate Online** with a new mobile phone number and sets it to primary. The sync will update **Blackbaud CRM** with the new profile info from **Luminate Online** and will set the mobile phone as primary.
- A **BBCRM** user switches the primary flag from one phone number on a constituent's record to another, based on a donation card. The sync will update **Luminate Online**'s primary phone flag to match **Blackbaud CRM**.

- **Do Not Sync** – The sync will update phone numbers and addresses between systems but will not update primary flags in either system.

Note — When the "Use CRM constituent update settings" option (above) is checked, these two settings are treated as set to "Do not sync"

Custom Field Mappings

Custom field mappings can be used on the Constituent Sync to bring additional information to **LO** from **BBCRM** or vice versa as part of the baseline sync. Upload and download mappings can both be configured from the "Custom field mappings" action on the Constituent Sync Process.



Configuration Notes

- Prior to implementing custom field mappings, a custom LuminateOnline.wsdl.dll needs to be generated from the **LO** site. This will allow the sync to interact with any fields they have renamed. If new custom fields are added or renamed in **Luminate Online** after the initial WSDL is generated, a new file must be produced.
- The Luminate Web Service Fields are case sensitive. You can verify the element name in the WSDL.

Note — The 'renamed value' configured in **BBCRM** (available under "Administration Functional Area > Sync Setup Options > Luminate Web Service Fields") must be one word and cannot contains spaces. If this value has not been mapped correctly, or contains spaces, you will receive an error message (i.e. "Invalid query syntax: select Field1, Field 2, ... from RecordType [where ...]")

DOWNLOAD MAPPINGS (LO→CRM)

Download mappings are used to bring additional fields on the constituent object from **Luminate Online** into **Blackbaud CRM**. To configure a download mapping, the field to be updated in **BBCRM** must be available in the Constituent Update Batch (i.e., OOB batch field, attribute, or custom extension field).

Note — Currently, the baseline **LO-CRM Integration** will only support attributes that are configured as "one per record." It also does not support the following data types: Constituent record, Fuzzy date, and Time.

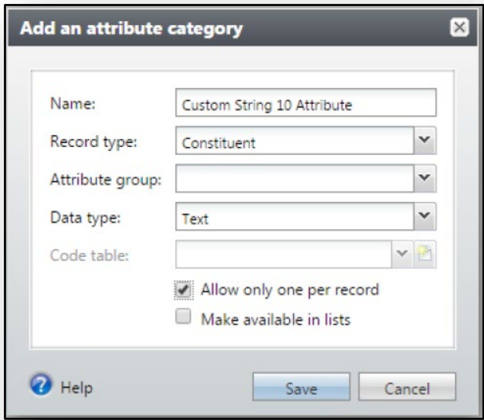
At a high-level, there are four steps to configure a download constituent field mapping:

1. Ensure the field is available in the Constituent Update Batch template.
2. Locate the name of the field in batch.
3. Configure the custom field mapping on the Constituent Sync process.
4. Test the Constituent Sync process.

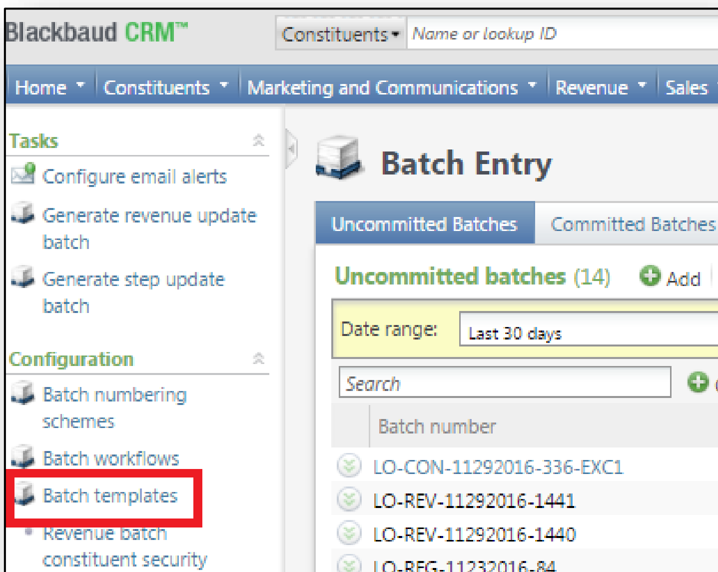
<u>Example</u>

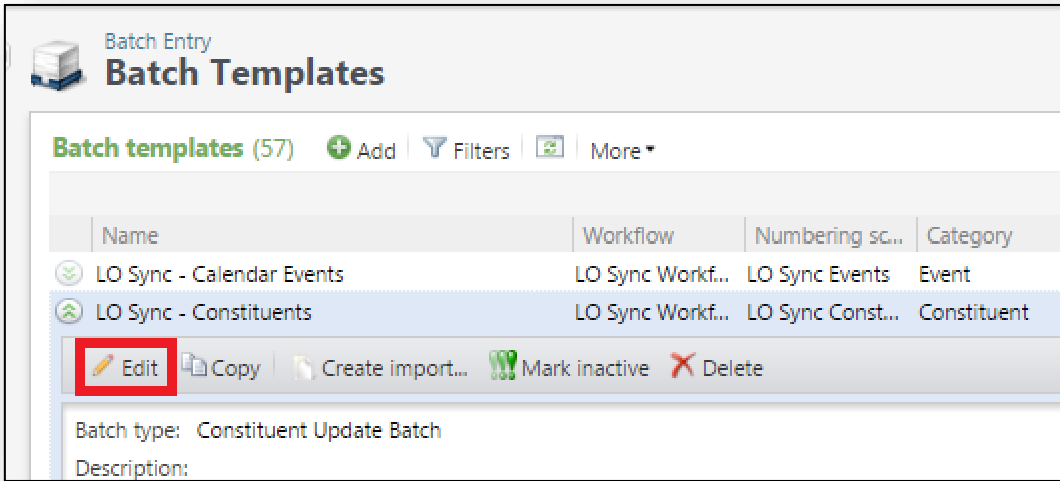
In this example, the Custom String 10 field from the constituent profile in **Luminate Online** will be brought into a **BBCRM** attribute.

- First, go to "Administration > Attributes" and create the attribute to be used (if it doesn't already exist). The attribute name can be chosen without any impact on the sync.

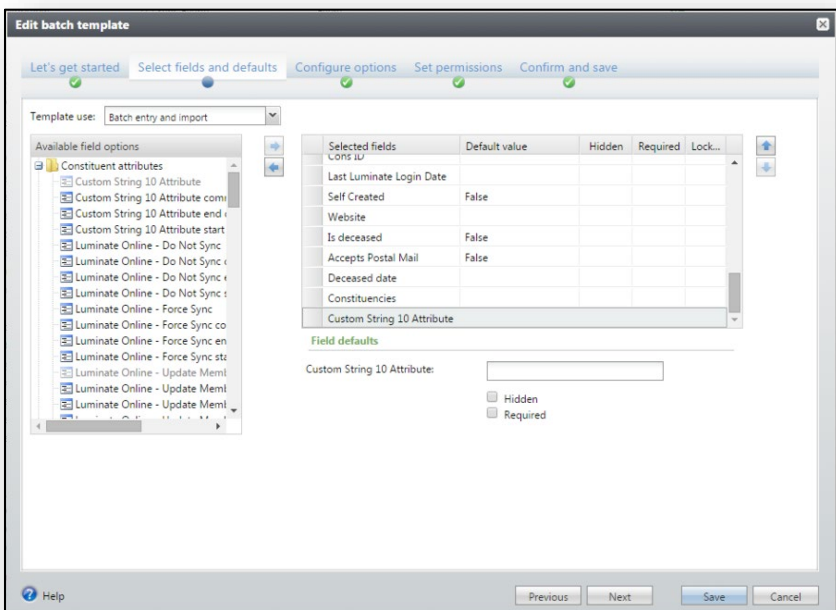


- Next, go to Administration > Batch > Batch Entry > Batch Templates and locate the "LO Sync - Constituents" batch template. Select "Edit."



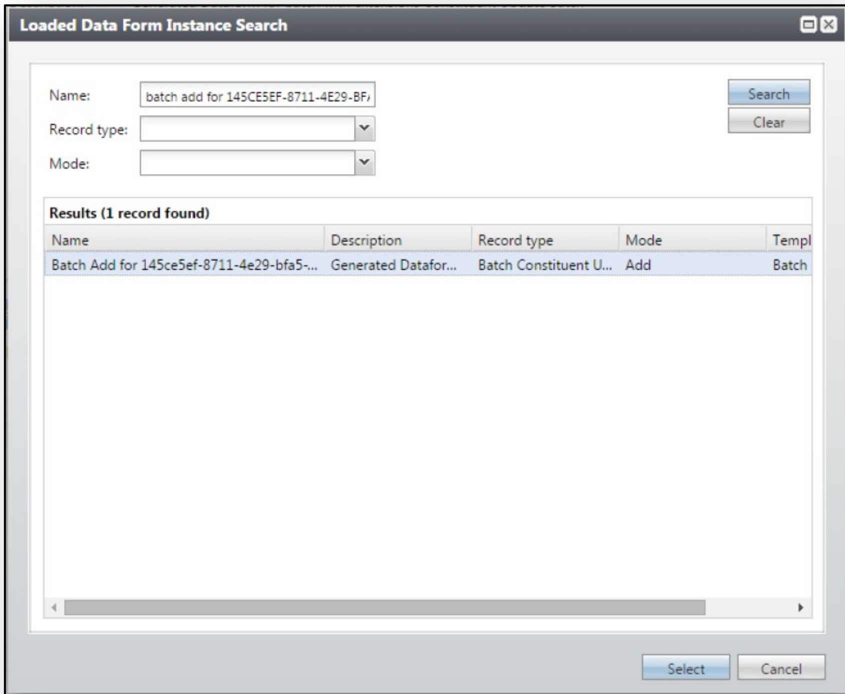


- Locate the attribute and add it to the batch template.

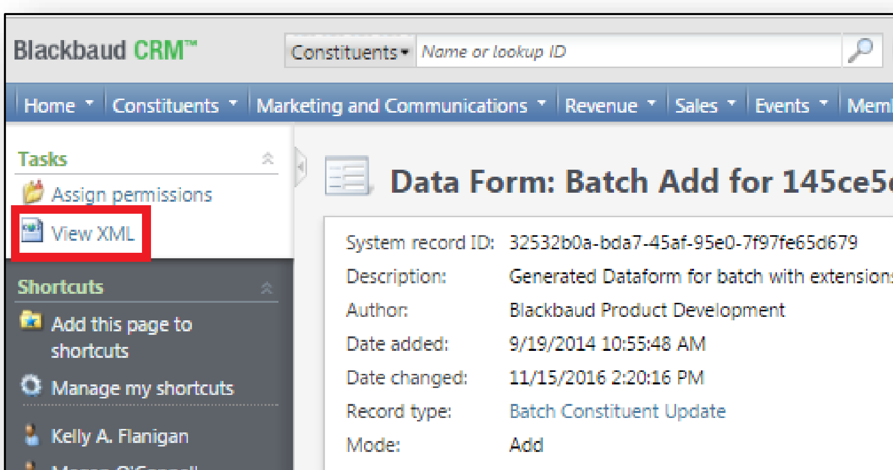


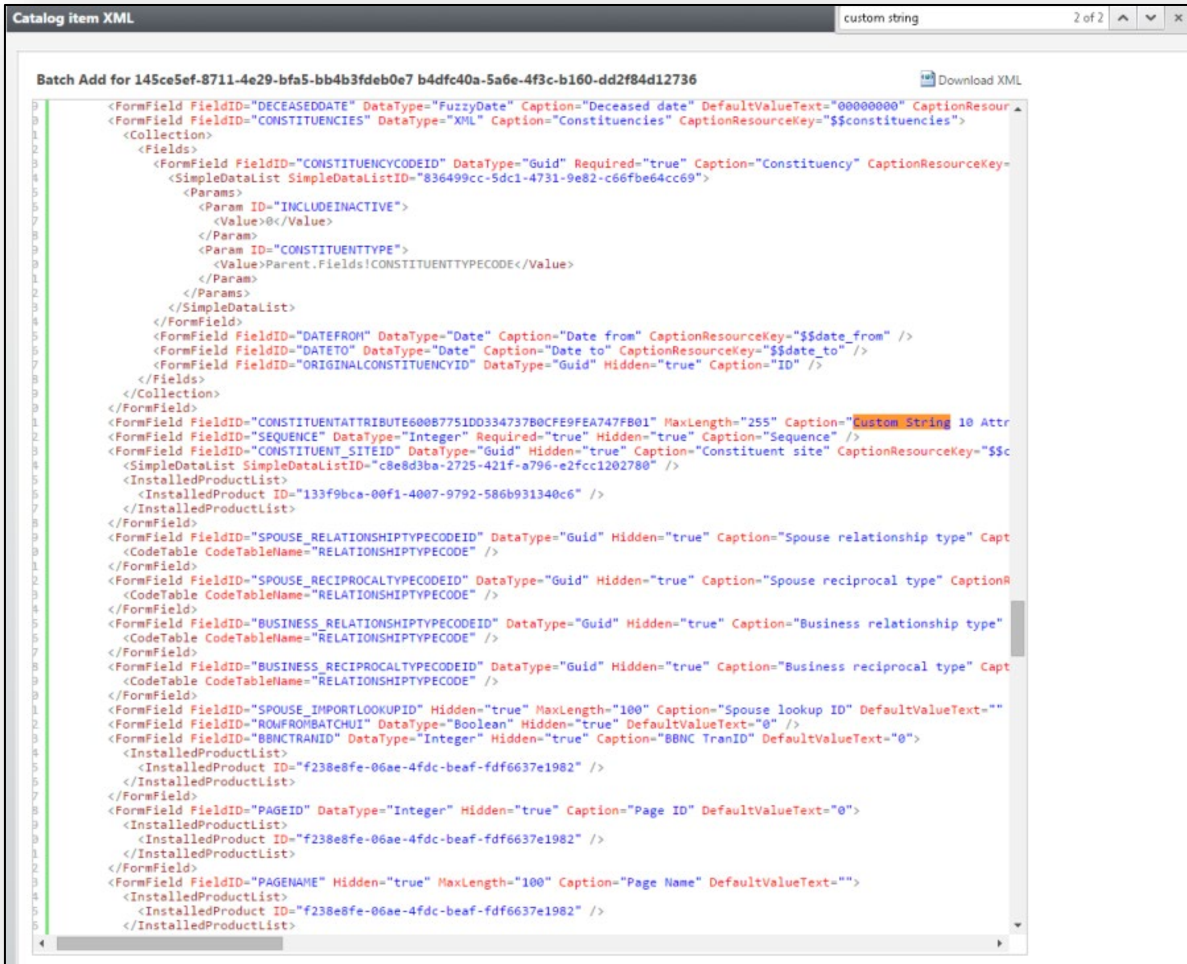
- Save the batch template.
- Next, to locate the name of the field in the batch (which is different than the caption displayed through the front-end), go to Administration > Application > Features. Select the "Data form search" task and search for "batch add for 145CE5EF-8711-4E29-BFA5-BB4B3FDEB0E7."

Note — This will work as long as the originally installed Constituent Sync batch template is in use.

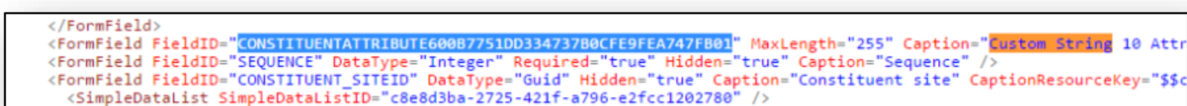


- Click Select.
- On the next page, click "View XML" in the upper left corner and maximize the window that appears. Search (press CTRL+F) for the name of the attribute (in this case, "Custom String 10") and the browser will highlight the proper field in the XML.



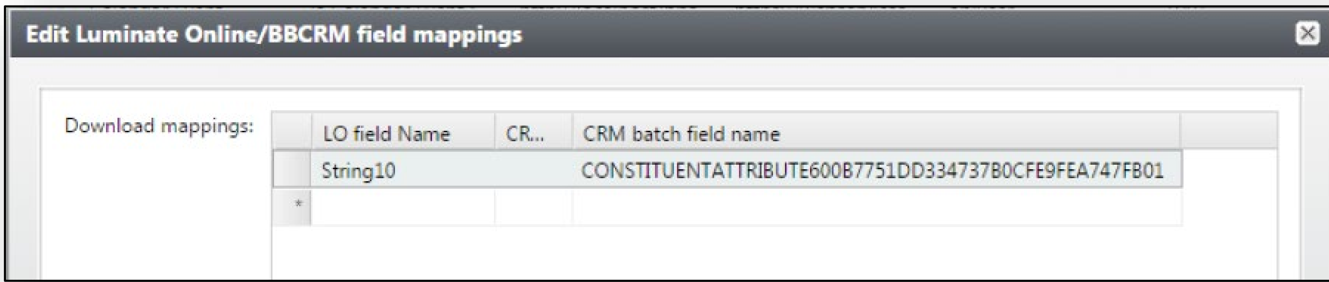


- Highlight and copy the FieldID, as shown below. This is the value that needs to be entered into the custom field mappings screen.



- Finally, go to back to the **Luminate Online Sync** page and select the "Custom field mappings" task on the Constituent Sync. Select the **LO** field to be brought into **BBCRM** from the drop-down in the first column and paste the value copied from the previous step into the "CRM batch field name" column.

Note — If the **LO** field does not appear in the drop-down, it needs to be added as a Web Services field in **BBCRM** (see *Luminate Web Services Fields*).



- Press save and test the sync after updating an **Luminate Online** constituent's String10 value.

UPLOAD MAPPINGS (CRM→LO)

Upload mappings are used to send additional fields from **Blackbaud CRM** to **Luminate Online**. To configure an upload mapping, the field to be sent to **LO** must be available in the Constituent Export Definition source view. For example, an organization may choose to send a BBCRM Smart Field Value into a custom monetary value on the Constituent Profile in **LO**, to be used for ask ladders and/or segmentation purposes.

Note — Depending on the **BBCRM** field to be sent to **LO**, a constituent may not automatically be triggered to re-sync when this value is updated. In this case, a global change can be configured to add the "Luminate Online - Force Sync" attribute to the appropriate records.

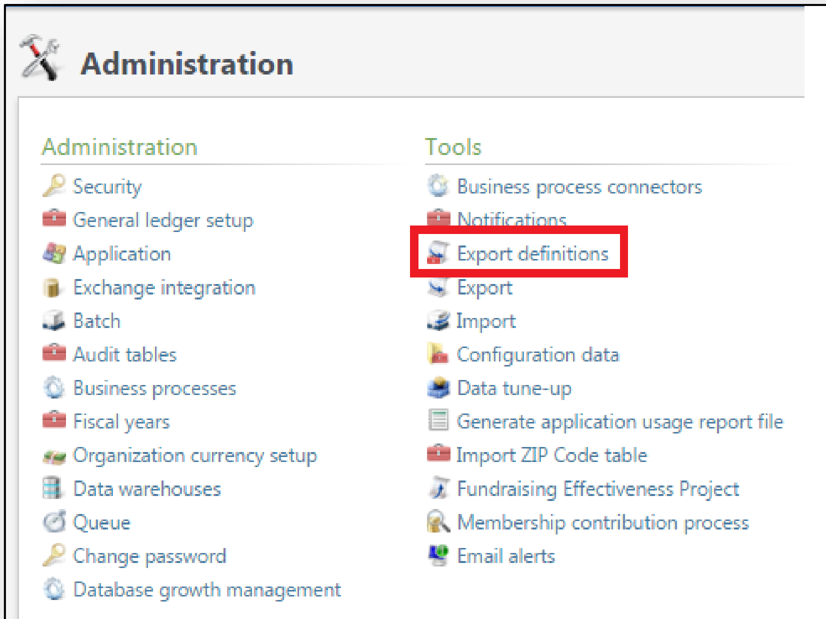
At a high-level, there are four steps to configure an upload field mapping:

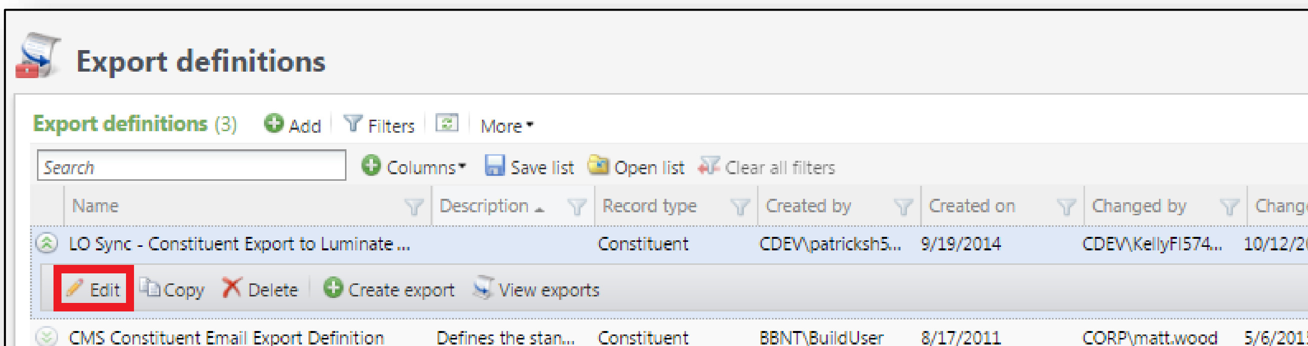
1. Add the desired field to the "LO Sync - Constituent Export to Luminate Online" export definition.
2. Run the export process to pull the export definition field name.
3. Configure the custom field mapping on the Constituent Sync process.
4. Test the Constituent Sync process.

Example

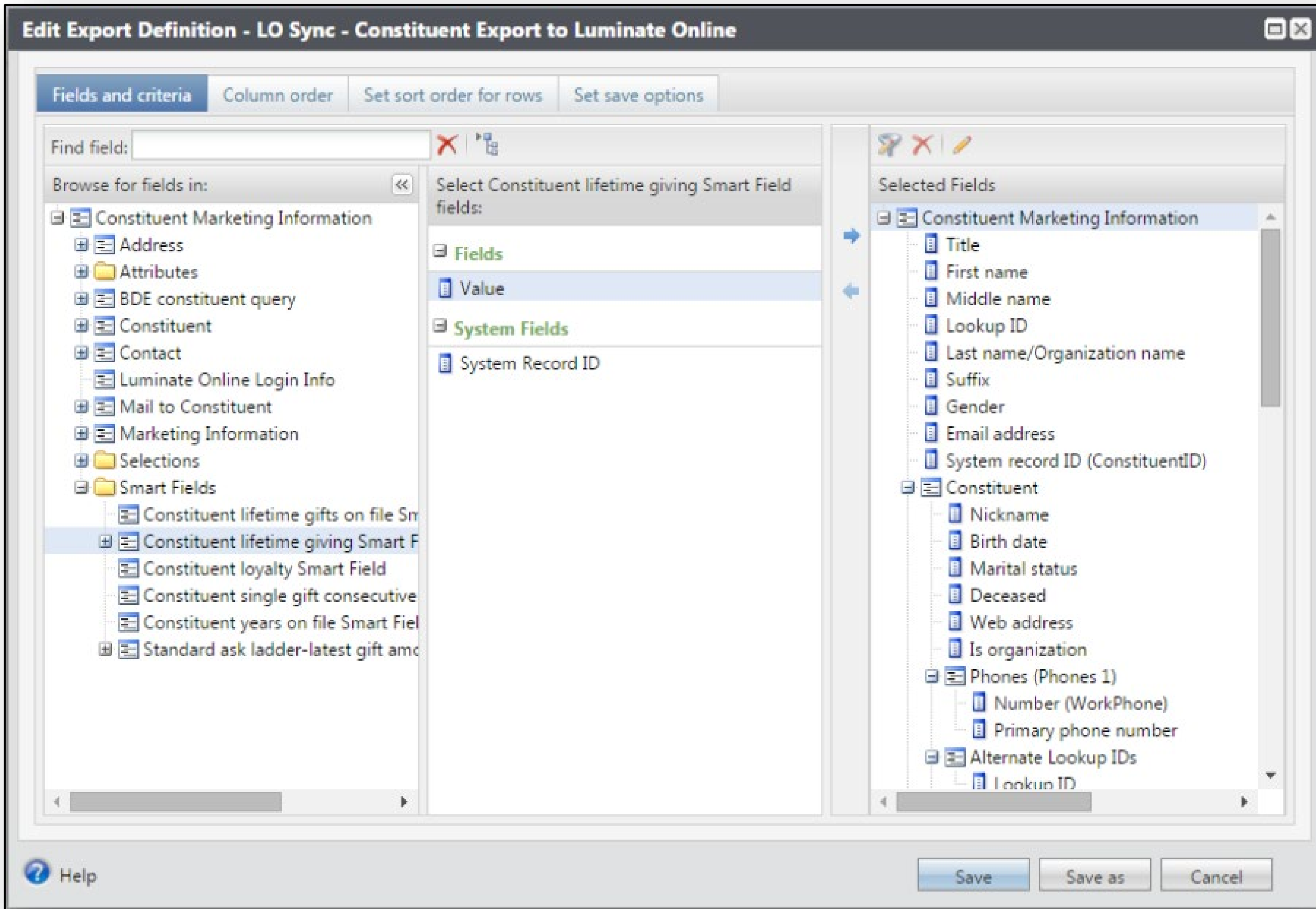
In this example, the custom field to be mapped is the Constituent lifetime giving Smart Field value.

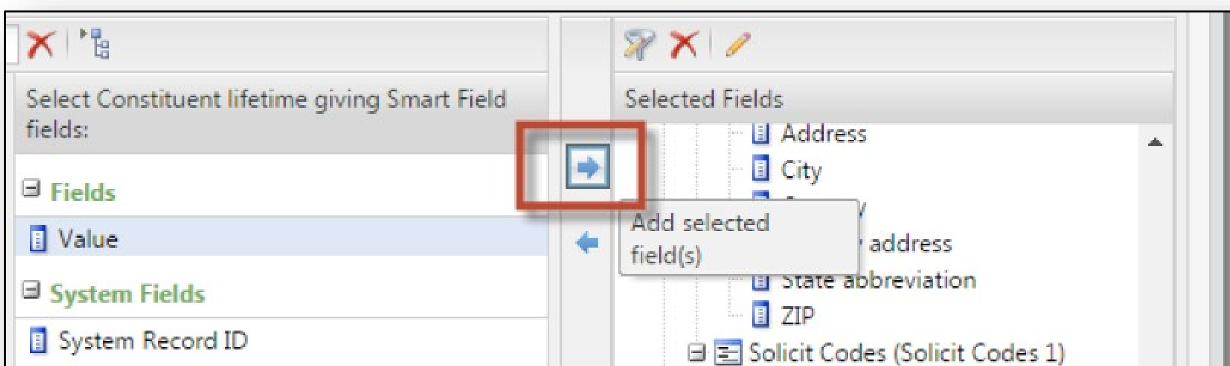
- First, go to Administration > Export Definitions and locate the "LO Sync - Constituent Export to Luminate Online" export definition. Select "Edit."





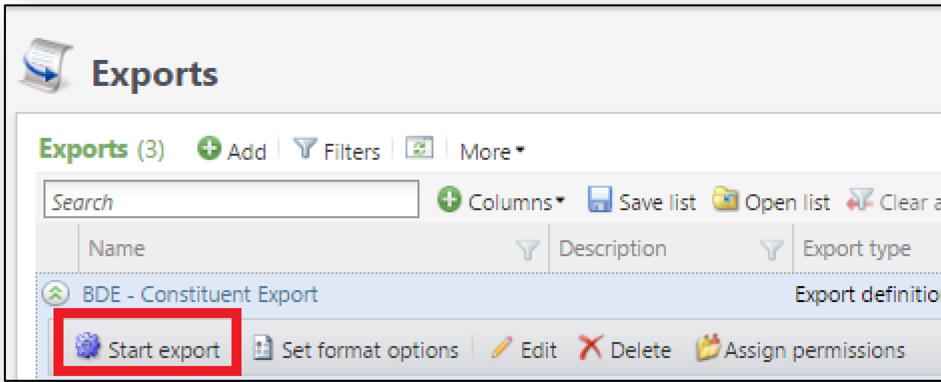
- Then, locate the field in the export definition and include it in the list of output fields. In this example, this is done by selecting "Smart Field" in the left pane, then highlighting "Value" in the center pane. Finally, in the right pane, select the top node ("Constituent Marketing Information") and then click the "add selected fields" arrow.



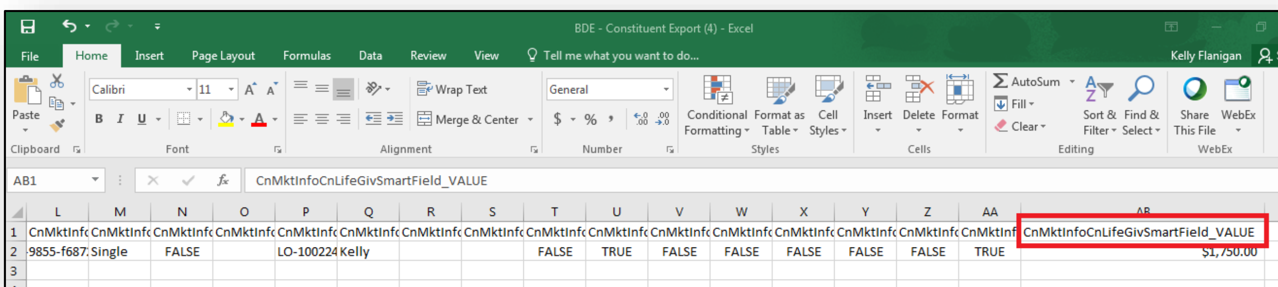


- Save the export definition.
- Next, go to Administration > Exports and locate the "BDE – Constituent Export" export process. Highlight the row and click "Start export."

Note — If no records are processed, edit a constituent in the configured BBCRM → LO universe and try again.



- Once the process has completed, download the output and copy the name of the new smart field column. In this case the column name is CnMktInfoCnLifeGivSmartField_VALUE.



- Finally, go to back to the Luminate Online Sync page and select the "Custom field mappings" task on the Constituent Sync. Select the LO field to be updated from the drop-down in the first column and paste the value copied from the previous step into the "Export definition name" column.

Note — If the **LO** field does not appear in the drop-down, it needs to be added as a Web Services field in **BBCRM** (see Luminate Web Services Fields).

- Press save and test the sync.

Organizations

The sync supports organizations in two different capacities, through a custom **LO** field and through the Organization module in **LO**.

CUSTOM BOOLEAN FIELD

When the sync is installed, **Luminate Online**'s constituent profile field CustomBoolean50 must be renamed to IsOrganization. When new constituents are synced from **Luminate Online** to **BBCRM** with the IsOrganization field = TRUE, an organization constituent will be created in **BBCRM**.

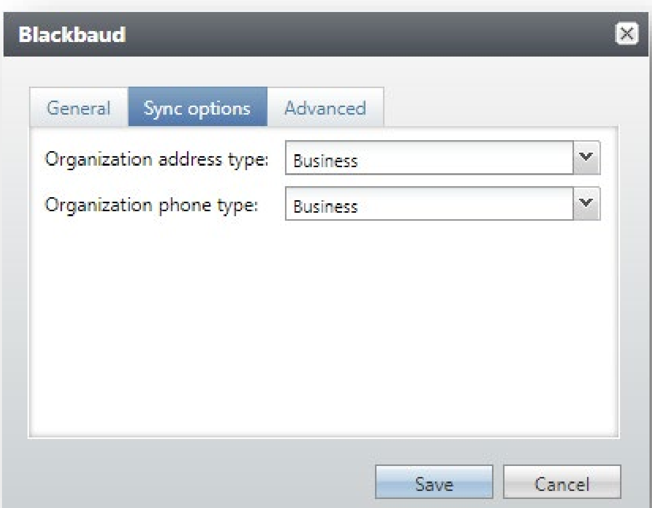
In this scenario, only the "Last Name" field in **LO** is brought over as the Organization Name field in **BBCRM**. Therefore, if "First Name" is a required field in the **Luminate Online** environment, it should only be populated with a placeholder value (i.e. "N/A").

The primary limitation of this design is that the IsOrganization flag in **Luminate Online** can be changed on an existing constituent, but **BBCRM** does not support switching constituent types. If the IsOrganization flag is changed in **Luminate Online** after a constituent is created in **BBCRM**, the constituent will be pulled out into an exception batch to be manually reviewed and updated, as needed.

ORGANIZATION MODULE

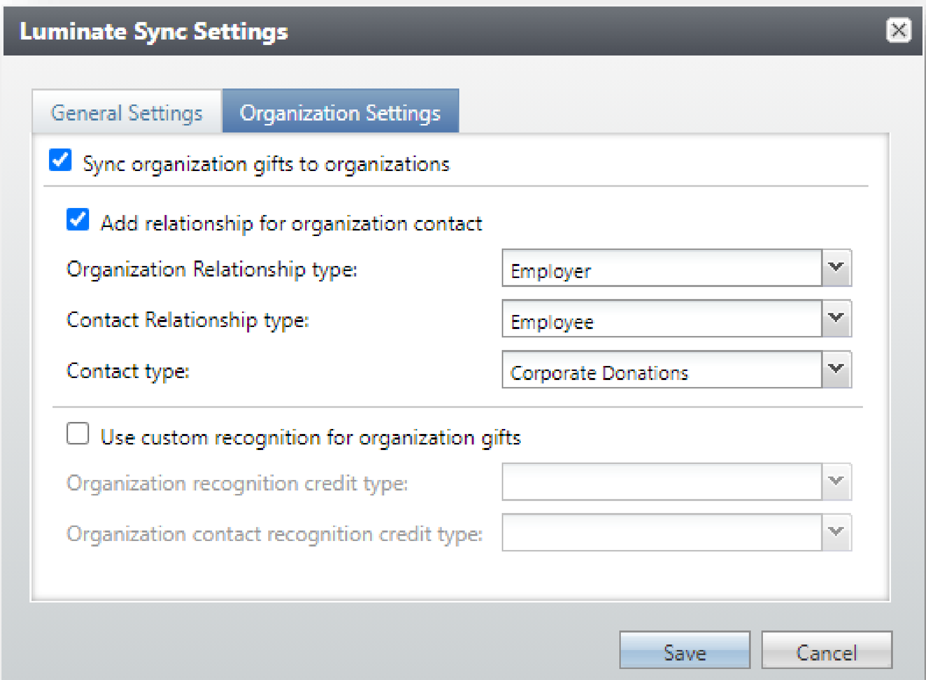
There is an optional one-way Organization sync for syncing Organizations from the **LO** Organization module to **BBCRM** organization constituent records. Records syncing from the **LO** Organization module will be created with an Alternate Lookup ID Type of “Luminate Online Organization” which is the LO Org ID prefixed by “LORG-”. By default, a “Luminate Online – Do Not Sync” attribute will be added to all of these Organization records to ensure they do not sync back to **LO**. A Config File for loading the Organization Sync, Batch Template, and Batch Numbering Scheme is available for download in the *Luminate Integration File Download Center in* the Administration functional area.

Organization constituent settings are found under Administration > Luminate Online Sync > Sync Process List and edit the "Organization Sync" process. Review the settings and set the Organization address/phone type on the Sync options tab. These are the types that the address/phone for the **LO** organization will be set to in **BBCRM**.



Organization gift settings are found under Administration > Sync Setup Options > *Global Settings* task. The global settings control whether or not organization gifts are going to sync from **LO** to the **BBCRM** organization constituent. All settings under the *Organization Settings* tab are turned off by default.

When enabling the syncing of organization gifts to the organization only the Donation and TeamRaiser Gift syncs are supported. A relationship can be auto-created between the Contact constituent listed in **LO** and the organization (Note: if any of the 3 relationship settings are not set, then no relationships will be added). Users can specify the relationship type and the Contact type created for the relationship. Lastly, custom recognition credit defaults can be applied for one or both of the Organization and the Organization contact for the Organization gift.



Constituent Attributes

Three new attributes are installed with the baseline **LO-CRM Integration Solution**:

Attribute Name	Description
Luminate Online - Force Sync	When present on a **BBCRM** constituent, all fields from **BBCRM** to be sent to **Luminate Online** for that constituent (as opposed to only those that have been recently updated). After a successful sync, this attribute is deleted.
Luminate Online - Do Not Sync	When present on a **BBCRM** constituent, the constituent will be excluded from the sync. This attribute is automatically added when **Luminate Online** responds

	that the constituent is a duplicate during an attempt to create a new constituent in **LO**. The Do Not Sync attribute only applies to the constituent sync from **BBCRM** to **LO**. It doesn't impede gifts/registrations/payments/etc. coming over from **LO** at all.
Luminate Online - Update MemberID & ExchangeID	When present on a **BBCRM** constituent, this will trigger an update to the member ID and exchange ID on the linked **Luminate Online** constituent. After a successful sync, this attribute is deleted.

Conflicting Data Updates

If a **Luminate Online** profile is edited at the same time as the associated **BBCRM** constituent, the change made in **BBCRM** will take precedence. However, **Blackbaud CRM** updates to **Luminate Online** are modular (meaning that only updated data is pushed to **Luminate Online**), so the entire **Luminate Online** profile is not overwritten each time. This reduces the chance of data loss in this conflicting update situation.

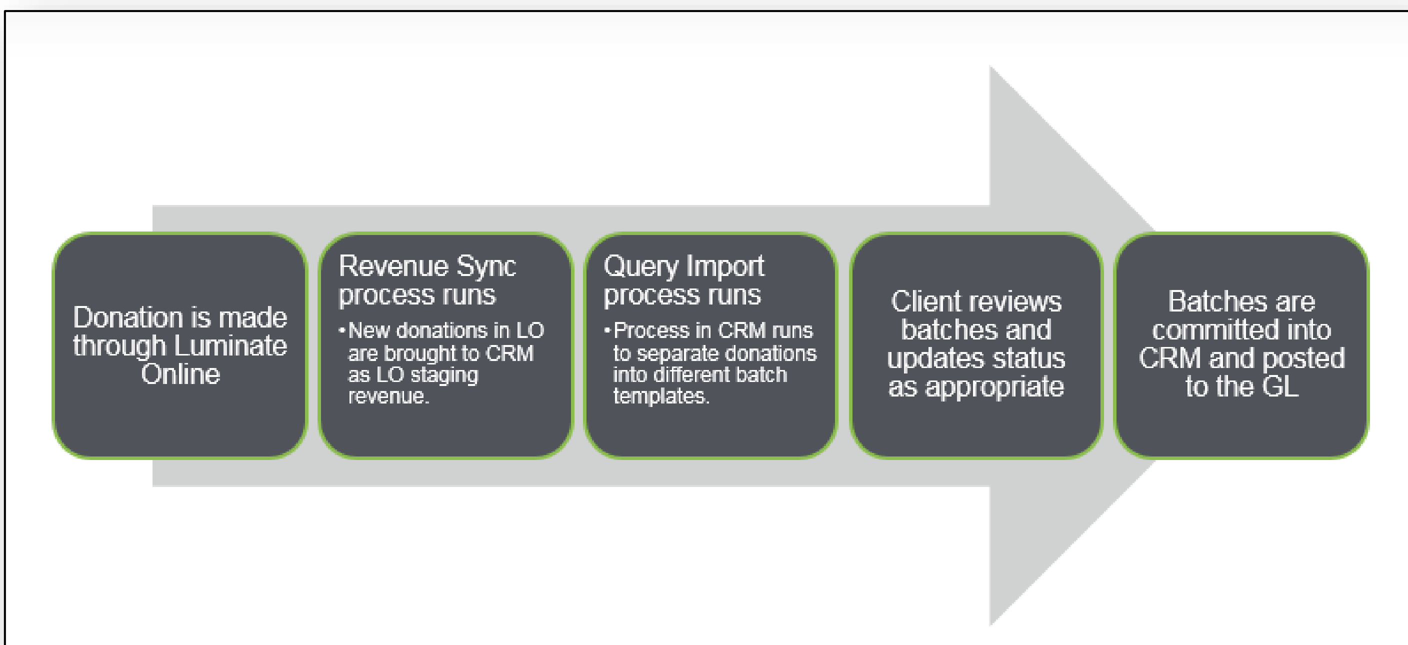
For example, if a phone number is updated in **BBCRM** at the same time an address is changed in **LO**, then the Constituent Sync process will send the new phone number to **LO**. The new address will not immediately be brought into **BBCRM**, but it will remain in **LO**. It would then be pushed back into **BBCRM** the next time the **LO** profile is triggered to sync to **Blackbaud CRM**.

REVENUE

Overview

The Revenue Syncs use a two step process to import any revenue from **Luminate Online**. The first step is a Sync Business Process that queries **Luminate Online** for any new records. New records are inserted into a staging table in **BBCRM** that is connected to the "Luminate Online staging revenue" record type in the Ad-hoc query. The second step is a modified Import process (Query Import) to create the batches for the revenue and mark the staged revenue as imported. The queries for staged revenue use standard Ad-hoc query and are structured so they only return unprocessed revenue. An Enhanced revenue batch extension uses the Luminate Sync Log ID column to link back to the stated revenue table and mark records with the batch number when they are imported. The query will then exclude any records where batch number is not blank. Records that are rejected from the batch will be retried every time the Query import process runs. Records that are batch row exceptions will stay in the imported batch and not be attempted again unless the batch is deleted.

The high-level workflow for all revenue transactions is shown below:



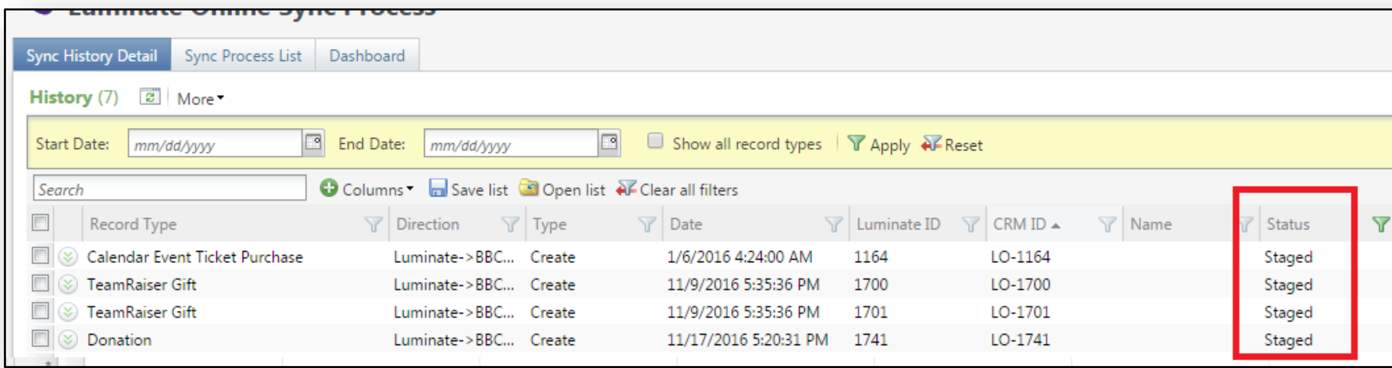
REVENUE SYNC PROCESSES

Revenue from **Luminate Online** is initially brought into **Blackbaud CRM** through several separate sync processes:

- Donations Sync (syncs both Recurring Gifts and Donation Payments)
- Recurring Gift Update (syncs Recurring Gift Status updates)

- TeamRaiser Registration Sync (syncs both Registrations and TeamRaiser Registration Payments)
- TeamRaiser Gifts Sync
- Calendar Event Registration Sync (syncs both Registrations and Calendar Event Ticket Purchases)
- E-Commerce Revenue Sync

When a Revenue sync process runs, revenue with that record type is brought into the staging table and will appear in the Sync History log with a status of "Staged." However Calendar Event Ticket Purchases and TeamRaiser Registration Payment, will initially have a status of “Waiting on Dependent Record” until the Registration batch is committed.

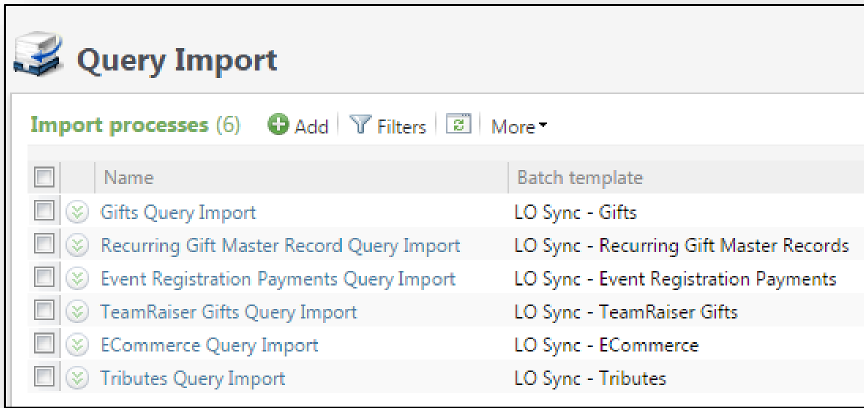


REVENUE QUERY IMPORTS

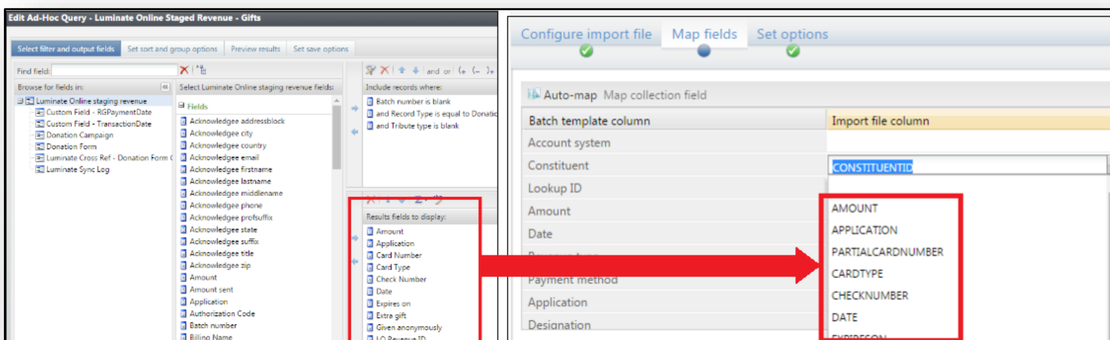
<u>QUERY IMPORT PROCESSES</u>

Unlike with other record types, the Revenue sync processes alone do not place **Luminate Online** transactions into batches. In order to provide greater flexibility regarding the batches and field mappings for revenue, the **LO-CRM Integration Solution** requires a second step, a Query import process, be run to bring revenue into a batch.

Query import processes (Administration> Business process connectors> Query Import) run after the Revenue sync processes. By default, six Query import processes are installed with the baseline **LO-CRM Integration Solution.** The default Query import processes cannot be consolidated, but they may be split out to create additional Query imports.



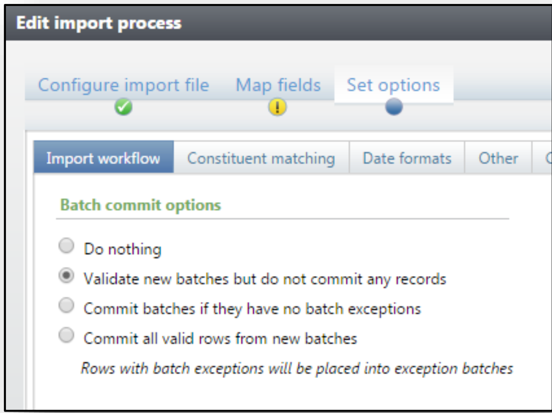
The Query import functions like a standard Import, but uses an Ad-hoc query's output fields instead of a separate file. These output fields are mapped to specific batch fields on the Query import process.



When a Query import process runs, the following occurs:

1. Run the associated Ad-hoc query and retrieve all revenue matching the query criteria. The standard criteria is "batch number is blank and record type = [record type for specific query]," but additional criteria may be added to segment out certain gifts.
2. Import each row from the query results into a new Enhanced Revenue Batch, based on the field mappings configured on the Query import process.
3. Update each staging row with the batch number it was assigned to. This will cause the revenue to be excluded from future imports, unless the batch is deleted.
4. The Sync History Log is updated to change the records in an open batch from "Staged" to "Pending."

Query import processes may be configured to auto-commit or require manual review, based on preference. The Recurring Gift Master Record Query import should be auto-committed to ensure subsequent payments are applied correctly.

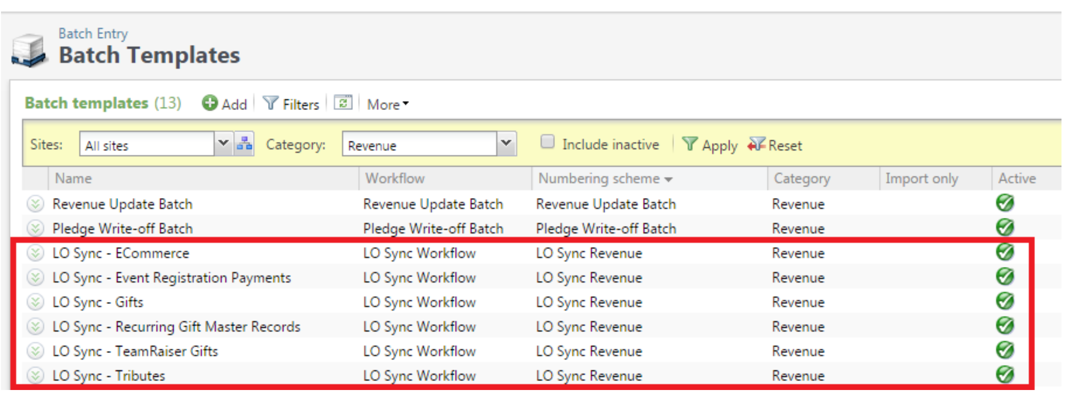


QUERY VIEW

The Query view of “Luminate Staging Revenue Analysis Query” shows *all* records in the staging table for full visibility - this allows users to see all records, even though marked as Pending and waiting on a dependent record. This query view should **NOT** be used for any Query import processes as doing so may result in importing records that are missing dependent records which will cause Query import errors.

BATCH TEMPLATES

Six Batch templates are included with the baseline **LO-CRM Integration** and used by the default Query import processes. Additional Batch templates can be created to support separate Query imports, as needed.

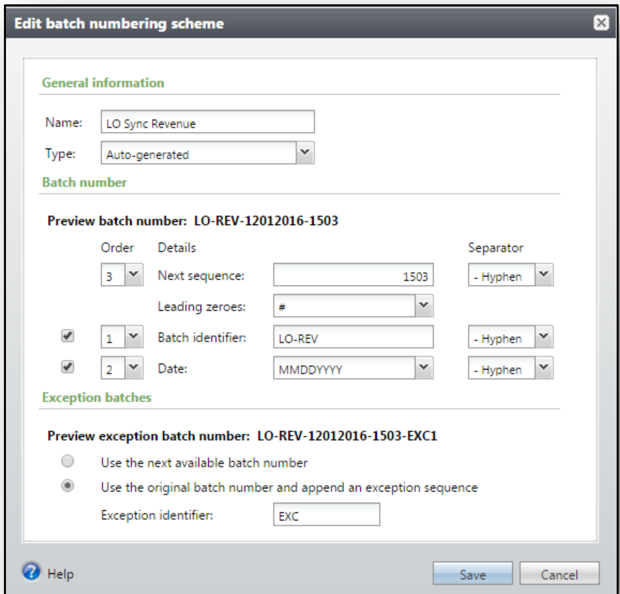


Batch Workflow

A one-step "LO Sync Workflow" batch workflow will be installed with the baseline **LO-CRM Integration** and assigned to all of the Luminate Online batch templates. This can be edited or replaced with no impact on the sync.

Batch Numbering Schemes

A "LO Sync Revenue" batch numbering scheme will be installed with the baseline **LO-CRM Integration** and assigned to all of the Luminate Online batch templates. This can be edited or replaced with no impact on the sync.



Batch Fields

All of the revenue query imports leverage an extended Enhanced Revenue batch. Although the exact mappings will vary based on the record type, all batch templates will share the following batch fields:

Column Name	Description
Account system	To be defaulted with each installation.
Constituent	Populated by query import.
Lookup ID	Populated by query import.
Amount	Populated by query import
Date	Populated by query import.
Revenue type	Defaulted to payment, except for the Recurring Gift Master records.
Payment method	Populated by query import.
Application	Populated by query import as donation, recurring gift payment, event registration payment, or other based on the record type.

Designation	Populated by the designee in **LO**, if the designated giving module is being used. In order for this to work, the "Accounting Code" field on the designee in **LO** must be populated with the Designation Lookup ID from **BBCRM**. Otherwise, this can be populated through a batch default or cross-reference (donations only).
Appeal	Populated by the query import for TeamRaiser Registration Payments and TeamRaiser Gifts. This can be populated through a batch default or cross-reference (donations only).
Check number	Populated by query import.
Card number	Populated by query import.
Card type	Populated by query import, based on configuration in Sync Setup Options.
Expires on	Populated by query import.
Reference	Based on preference.
Given anonymously	Populated by query import for Donations and Recurring Gift Master records.
Enable customizations	Default to true; used for troubleshooting.
Luminate Event ID (custom)	Populated by query import with the TeamRaiser Event ID, if applicable.
Luminate Registrant ID (custom)	Populated by query import with the TeamRaiser Registrant ID, if applicable. Used to assign recognition credit for gifts made to support a specific registrant.
Luminate Team ID (custom)	Populated by query import with the TeamRaiser Team ID, if applicable. Used to assign recognition credit for gifts made to support a team.
Sync Log ID (custom)	Populated by query import but hidden. Used to update the staging table and sync log
Revenue ID	Populated by query import. For Recurring Gift Master Records, the Revenue ID will be 'SUS-' + Luminate Online ID. For all other record types, the Revenue ID will be 'LO-' + Luminate ID. **This field is critical to maintain uniqueness on imported revenue**. Any revenue that imports a second time will except out due to violating a unique Revenue ID rule.
Luminate Online Reference Number (attribute)	Populated by query import with the **Luminate Online** transaction reference number.

CUSTOM FIELD MAPPINGS

Custom field mappings can be used on the Revenue Sync Process to bring additional information to **LO** from **BBCRM**. These mappings can be configured from the "Custom field mappings" action on the sync process for the appropriate record type(s).

To configure a download mapping, the field that is to be updated in **BBCRM** must be available in the Enhanced Revenue Batch (i.e., OOB batch field, attribute, or custom extension field).

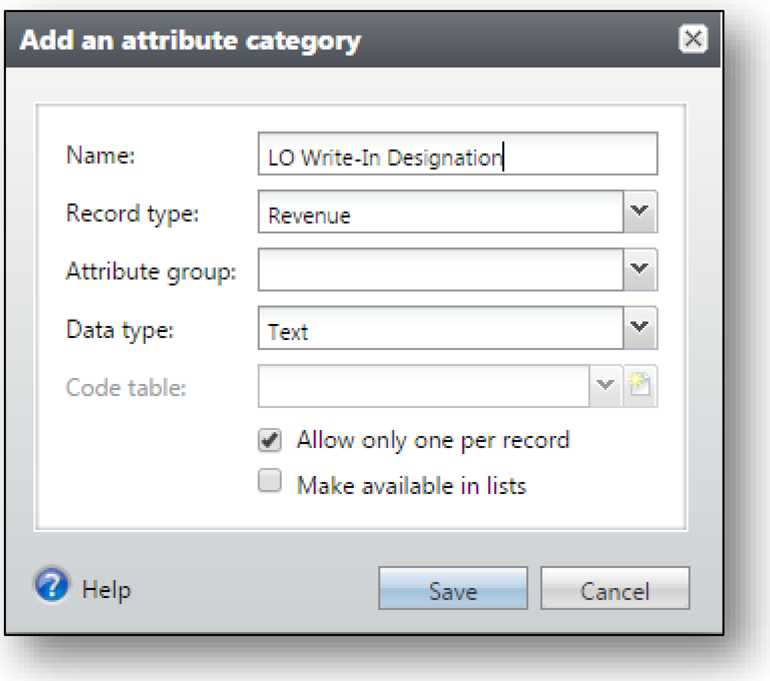
At a high-level, there are four steps to configure a download revenue field mapping:

1. Ensure the destination field is available in the Enhanced Revenue Batch template.
2. Configure the custom field mapping on the appropriate Revenue Sync process.
3. Update the query import process.
4. Test the Revenue Sync process.

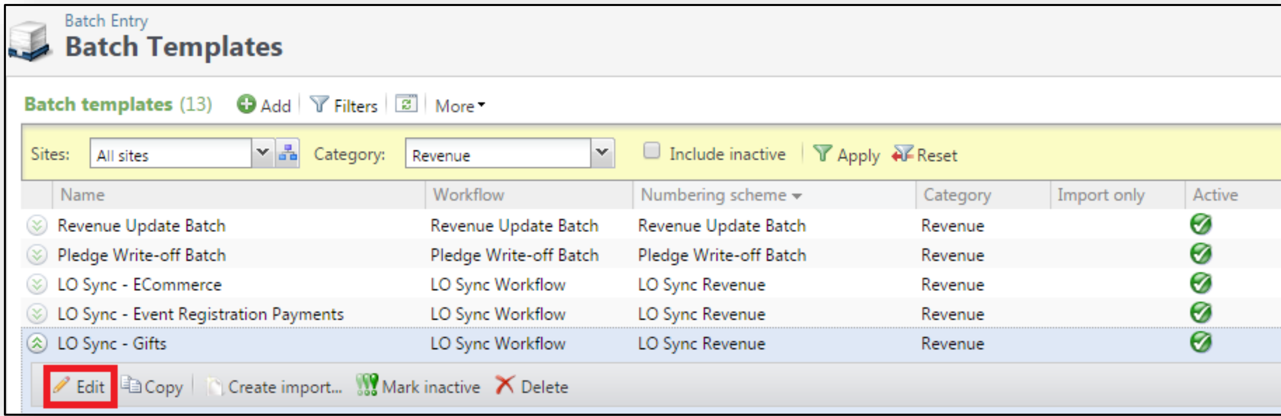
Example

In this example, the custom "Write-In Designation" field on the transaction in **Luminate Online** will be brought into a **BBCRM** attribute.

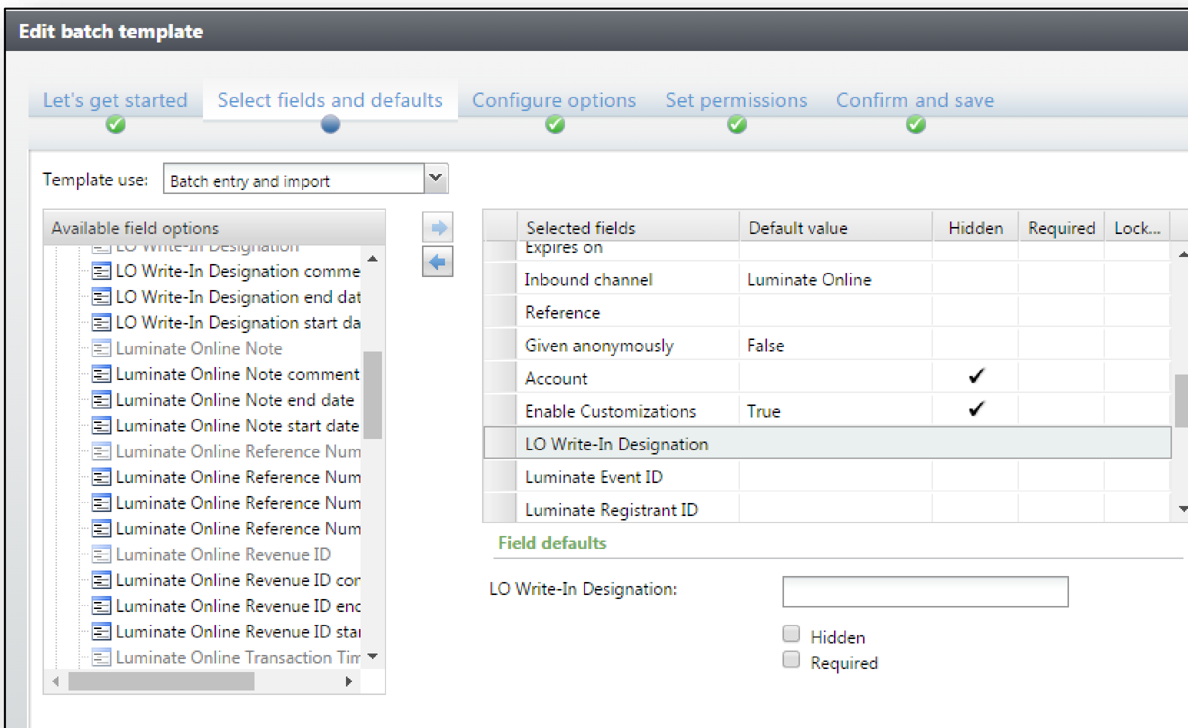
- First, go to Administration > Attribute Categories and create the attribute to be used (if it doesn't already exist). The attribute name can be chosen without any impact on the sync.



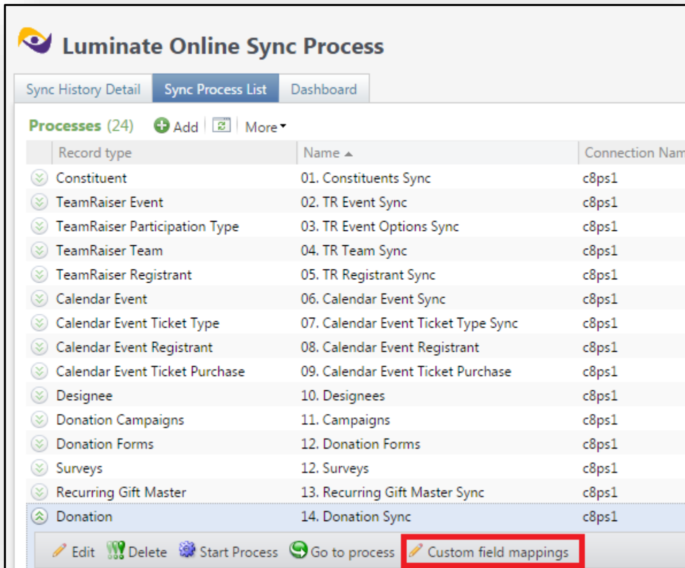
- Next, go to Administration > Batch > Batch Entry > Batch Templates and locate the appropriate revenue batch template. Select "Edit."

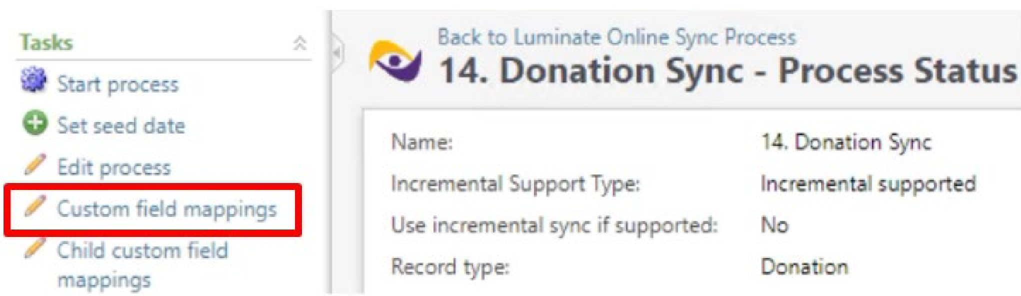


- Locate the attribute and add it to the batch template.



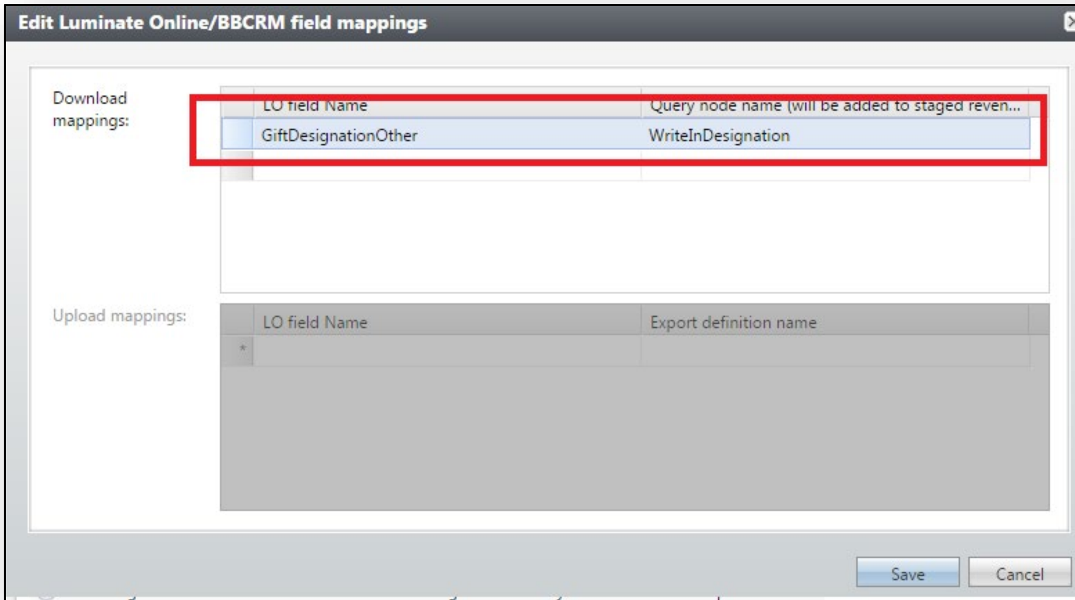
- Save the batch template.
- Next, go to back to the Luminate Online Sync page and select the "Custom field mappings" task on the appropriate revenue sync, or select the "Custom field mappings" task from the sync process page.



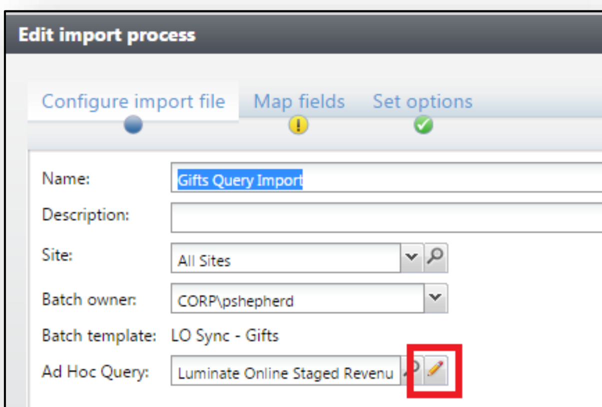


- Select the **LO** field to be brought into **BBCRM** from the drop-down in the first column. In the second column, any value for the query node name may be used, as long as it does not duplicate a name that is already in use.

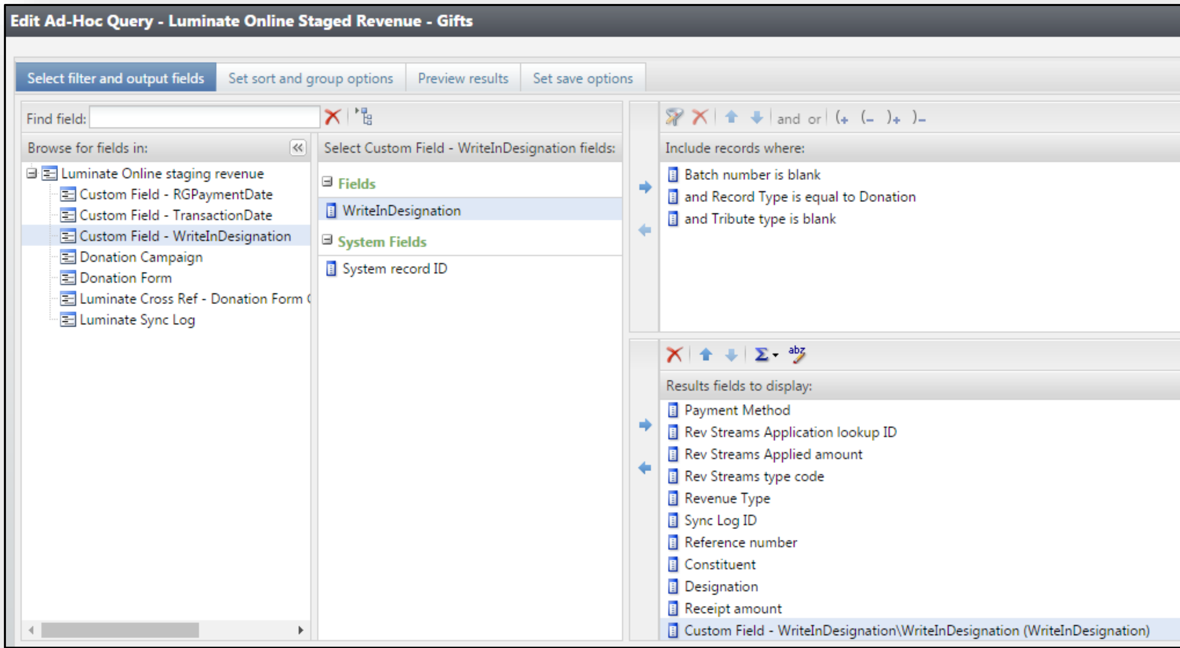
Note — If the **LO** field does not appear in the drop-down, it needs to be **added as a Web Services field in BBCRM** (see *Luminate Web Services Fields*).



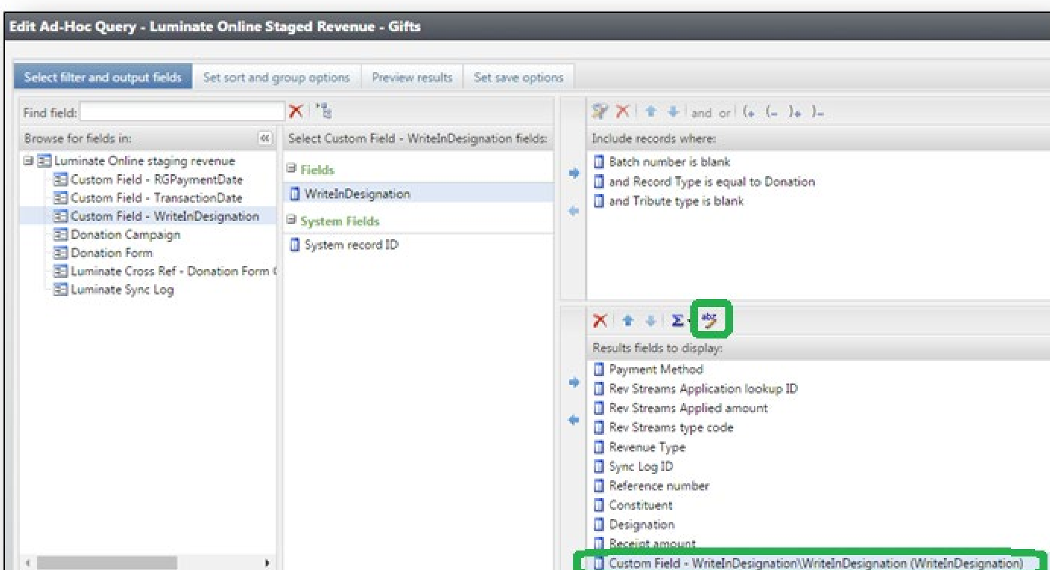
- Finally, go to Administration > Business Process Connectors > Query Import. Locate the query import(s) that should include this custom field and select "Edit." Click on the pencil icon next to the query name to edit the query.



- Find the new node labeled "Custom Field -" + the name selected when configuring the custom field mapping on the revenue sync process. Pull the field into the query output fields.

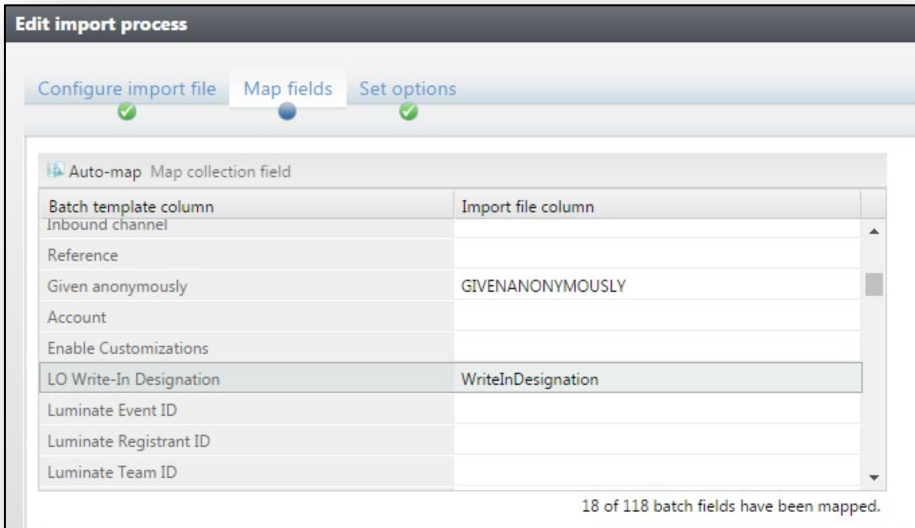


- Select the new field in the Results fields to display window. Click on the change column header icon  and type in a new name for the field, e.g., WriteInDesignation. Press "Save."



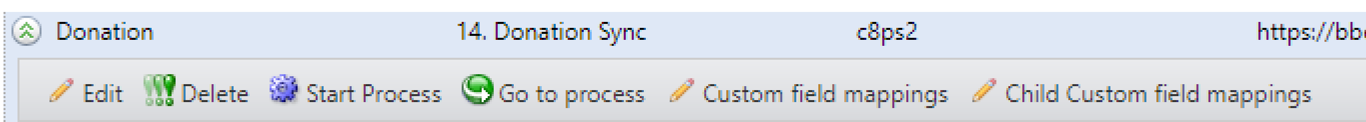
- On the query import screen, choose the "map fields" tab. Locate the field for the attribute previously added to the batch template and select the new field from the drop-down, then click "Save."

Note — If you don't see the new field in the drop-down immediately, exit out of the query import window and then click "Edit" to reopen it.



CHILD CUSTOM FIELD MAPPING

Three of the sync processes bring over two related record types, each of which can potentially have their own custom mapping. For these syncs you'll see both a "Custom field mappings" and a "Child Custom field mappings."



Below is a list of the combined syncs, and what record type each of the two custom field mapping buttons are for.

Sync name	Custom field mappings	Child Custom field mappings
Calendar Event Registrant Sync	Calendar Event Registrations	Calendar Event Ticket Purchases
Donation Sync	Donations	Recurring Gifts
TeamRaiser Registrant Sync	TeamRaiser Registrations	TeamRaiser Registration Payments

Donations

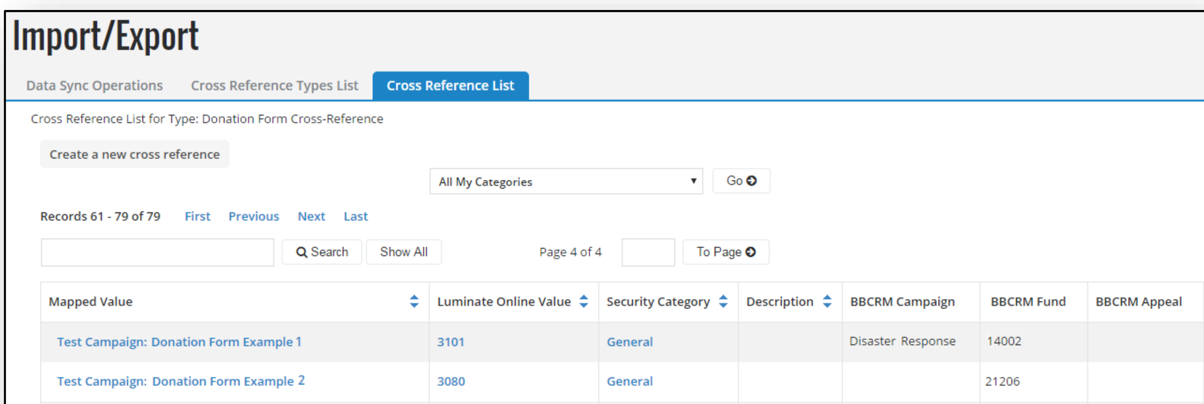
The Donations Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It is a combined sync bringing over both Donation and Recurring gifts. It has a child sync for Recurring Gift Master Records as described in the *Recurring Gifts* section. This section will focus on new gifts.

New gifts are brought into an Enhanced Revenue Batch with an application of "Donation" or "Recurring Gift." The revenue's lookup ID will be set to 'LO-' + the LO transaction ID. Donations follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.

Note — Split gifts using Designated Giving are not supported by the **LO-CRM Integration**. If a donation is made in **Luminate Online** that is split to more than one designee, the donation will sync to **BBCRM** with the full amount to the first designee (designation). Duplicate revenue transactions for the split gift in the Staged Revenue Table may appear, but only one will be committed in **BBCRM** as the duplicate transactions share the same Revenue ID.

CROSS-REFERENCES

The Donations Sync is able to leverage information on cross-references maintained within **Luminate Online** to populate certain fields in batch (i.e. designation, revenue category, appeal). For example, a cross-reference can be used to populate the gift appeal based on the donation form or campaign.



<u>**Example:**</u>

A cross-reference has been created in **LO** to associate online donation forms with a specific **BBCRM** appeal and designation.

- Go to Administration > Sync Setup Options > Revenue Cross-Reference Configuration. Click "Add."
    - Name the cross-reference (i.e., "Designation and Appeal").
    - In the Conviokey field, choose "FORMID."
    - In the appropriate Foreign key label, type "Appeal."

    - In the appropriate Foreign key label, type "Designation."
    - Press "Save."

- Go to Administration > Business Process Connectors > Query Import.
- Click on the pencil icon next to the query name to edit the query.
    - Remove the existing designation field from the output fields.
    - Find the new node labeled "Luminate Cross Ref – Designation and Appeal." Pull the designation and appeal fields into the output fields.
    - Press "Save."
- Choose the "Map Fields" tab.
    - Make note of the number of fields mapped.
    - Click "Auto-Map." The two additional fields should auto-map and increase the number of fields mapped by two.
    - Click "Save."

TRIBUTES

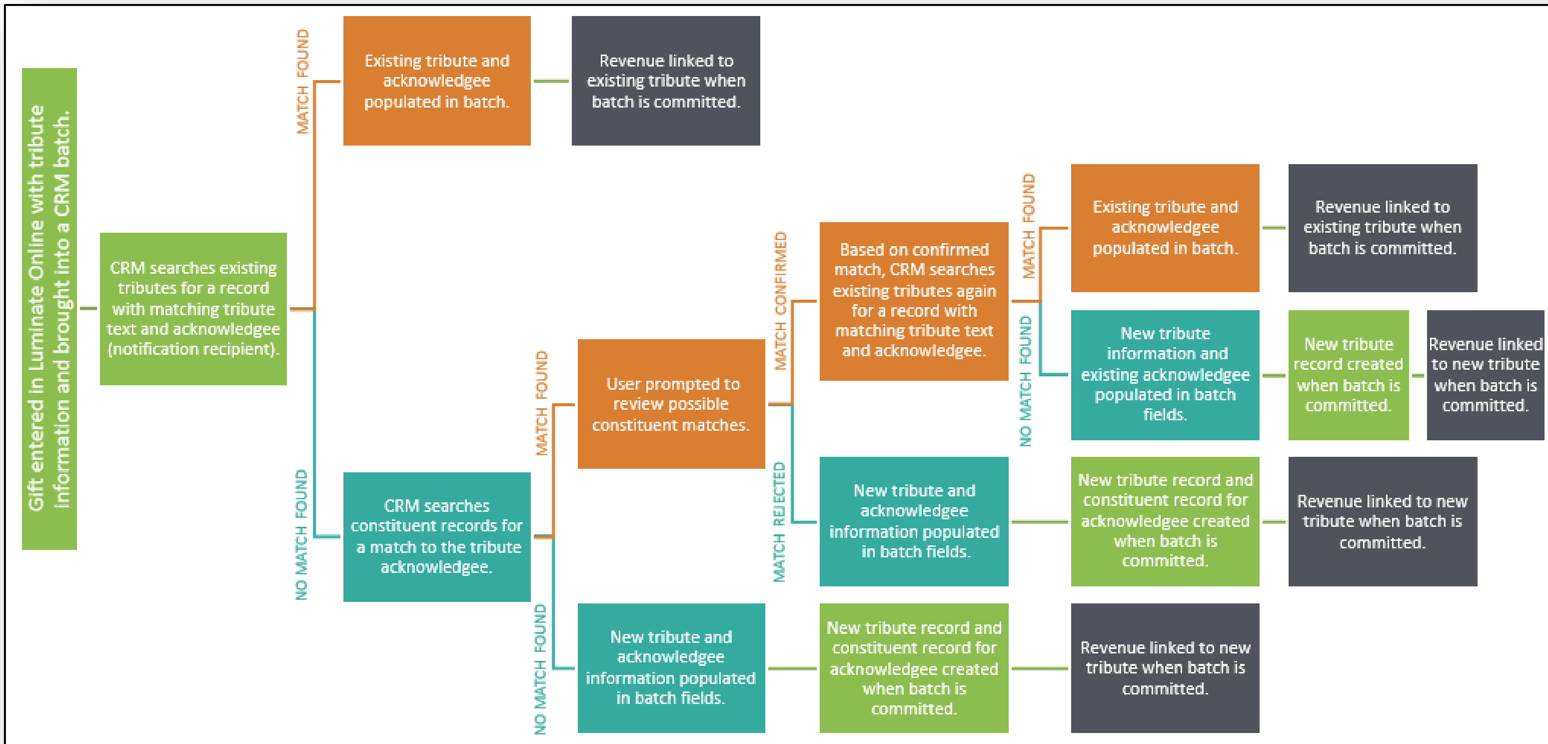
Any honor/memorial information provided in **Luminate Online** is brought into **Blackbaud CRM** using the standard tribute functionality. Tribute-related fields are added through a batch extension. Custom batch logic will attempt to match incoming tributes with existing tributes in **BBCRM**, using the tribute message and acknowledgee. The logic will also attempt to match the acknowledgee to an existing **BBCRM** constituent. If no match is found, a new constituent record will be created for the acknowledgee. When the revenue is committed, it will be linked to the existing or newly-created Tribute record.

Although the **LO-CRM Integration** will create and link tribute acknowledgees, tributees are not created by the sync process. Tributees can be linked to any new tributes after the batch has been created, as needed.

Note — The Tribute types hard coded into **LO** ("in honor of" and "in memory of") must be configured in **BBCRM** in order for the Tribute data to be brought into the batch.

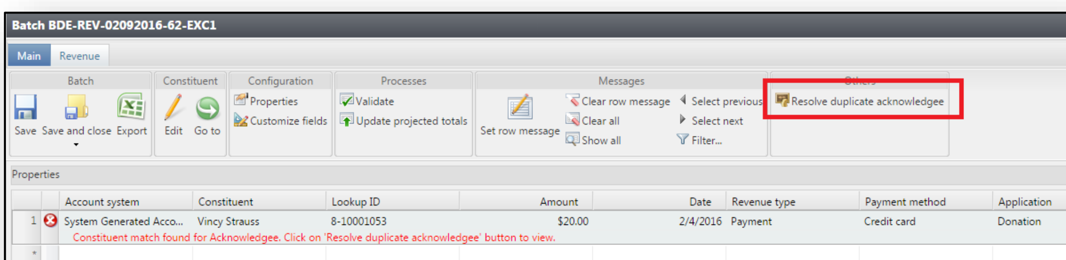
Note — When a new constituent is created for the tribute acknowledgee, any provided contact information is added to the new constituent record. However, the contact type (i.e. address type, email address type) will not be populated.

Note — When a donor is allowed to list more than one email address when sending an eCard, the **LO-CRM Integration Solution** will only bring the first email address listed as the Tribute Acknowledgee’s email address

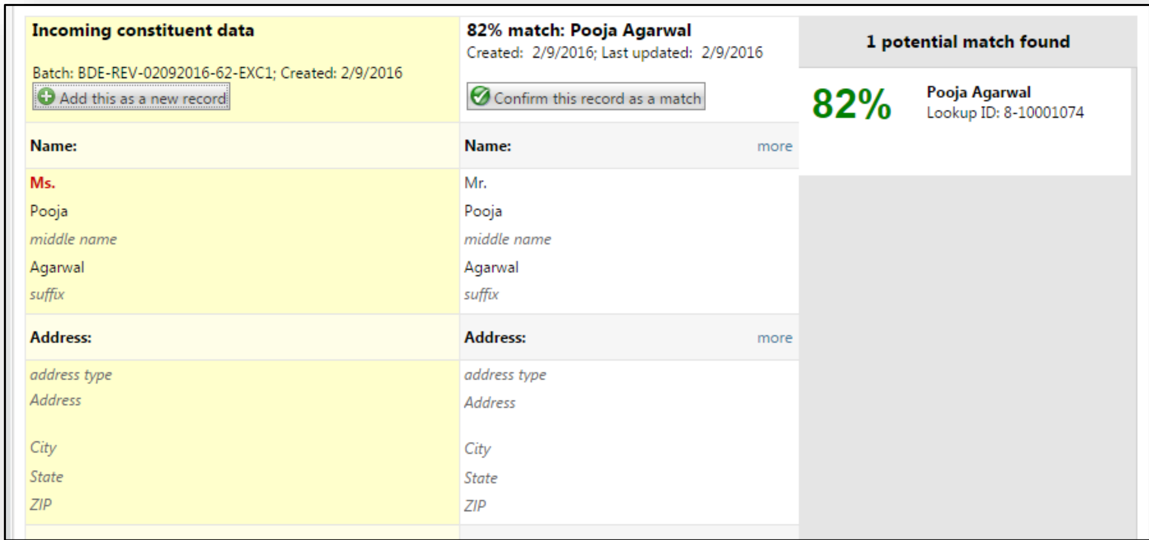


ACKNOWLEDGEE MATCHING

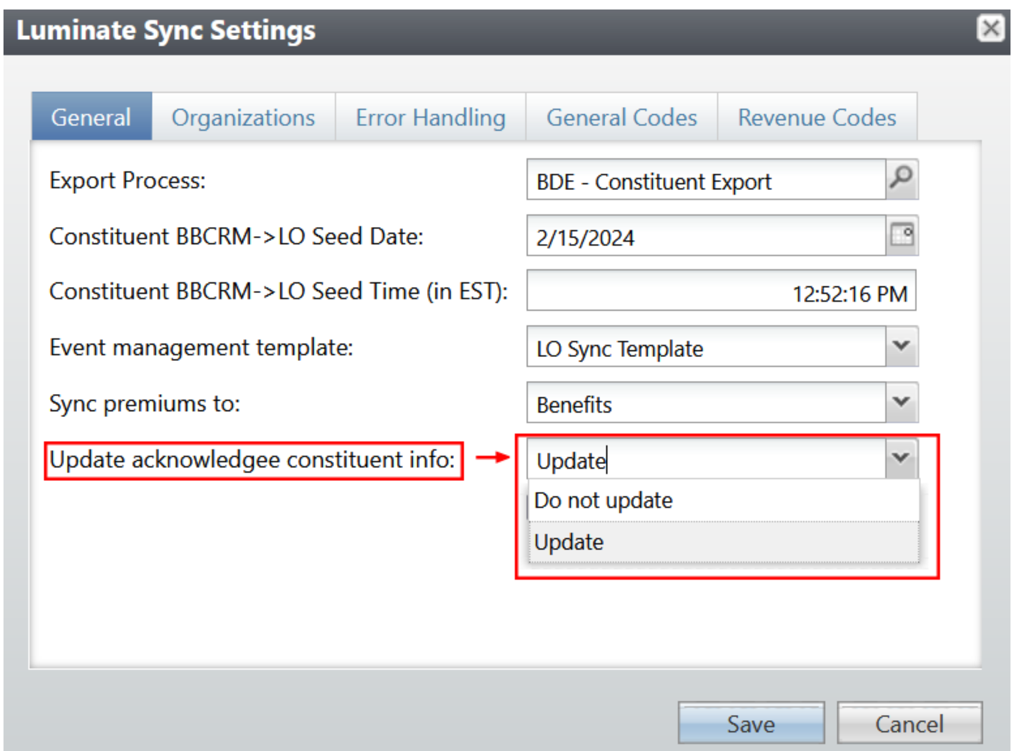
The constituent matching settings configured on the batch template determine the likelihood of a tribute acknowledgee being matched to an existing **BBCRM** constituent. If **BBCRM** does identify a potential match, there will be an exception on the record: "Constituent match found for Acknowledgee. Click on 'Resolve duplicate acknowledgee' button to view."



After clicking on the "Resolve duplicate acknowledgee" action, the standard **BBCRM** constituent matching screen will open, and the user will be prompted to confirm/reject possible matches.



As of version 4.0.36 an option has been added to the <u>*Global Settings*</u> to allow acknowledgee constituent data to be added to **BBCRM** when the incoming acknowledgee is matched to an existing constituent.

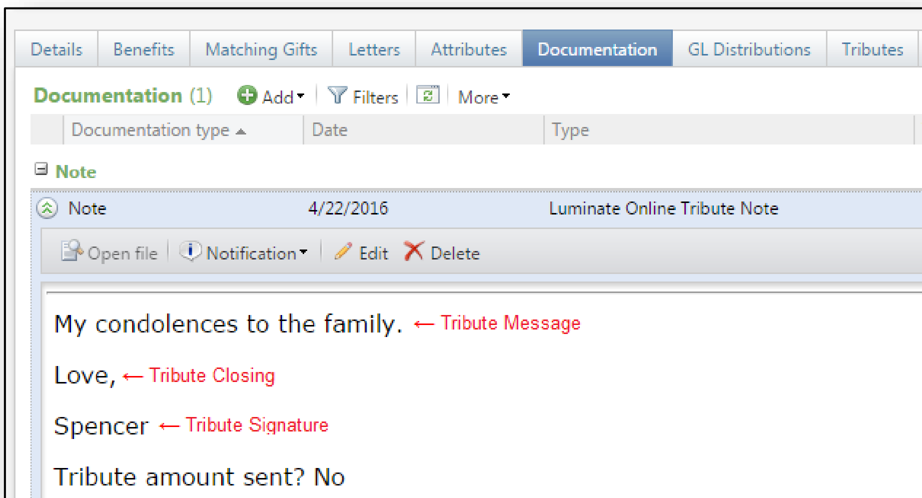


- If Update acknowledgee constituent info is set to *Do not update,* no acknoweldgee data from **LO** will be added to the existing constituent in **BBCRM**.
- If Update acknowledgee constituent info is set to *Update,* new name and contact data from the acknoweldgee in **LO** will be added to the existing constituent in **BBCRM**. No existing data in **BBCRM** will be modified. Only new data will be added to the record in **BBCRM**.

- If the incoming name is not an exact match an alias will be added to the constituent in **BBCRM** that contains the acknowledgee name from **LO.**
- If the address, phone number or email address from the acknowledgee in **LO** is not an exact match to an existing address, phone number or email address for the constituent in **BBCRM**, a new contact record will be created in **BBCRM**.

TRIBUTE NOTE

Any data provided in the tribute message, tribute closing, and tribute signature fields are concatenated into a single note on the revenue record in **BBCRM**. The note type to use is configured on the *Global Settings* task in Administration > Sync Setup Options.

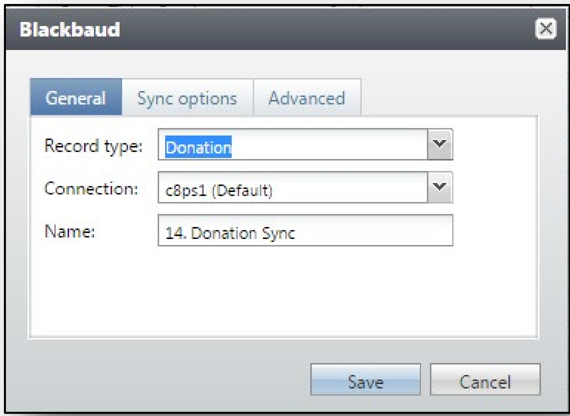


SYNC PROCESS CONFIGURATIONS

The Donations Sync Process has some configurable options that can be set based on preference (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Donations Sync).

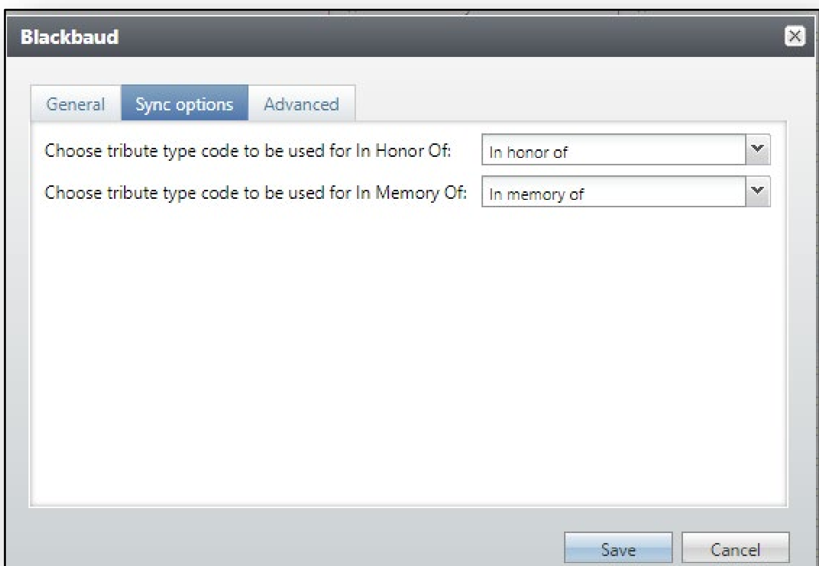
GENERAL

The default options under the *General* tab should not be changed.



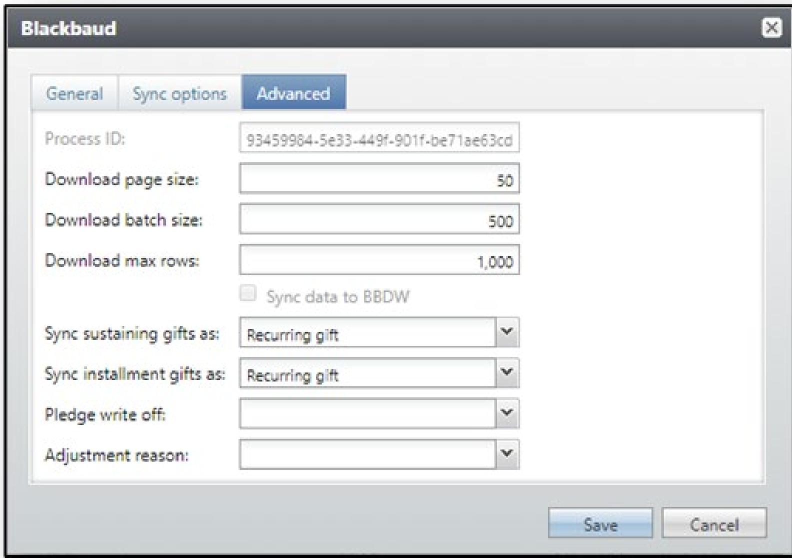
SYNC OPTIONS

In the *Sync Options* tab, select the Tribute Type code to be used for the 2 LO Tribute types.



ADVANCED

The first 4 default options under the *Advanced* tab should not be changed. The last 4 options affect the child sync and will be discussed in the *Recurring Gifts* section below.



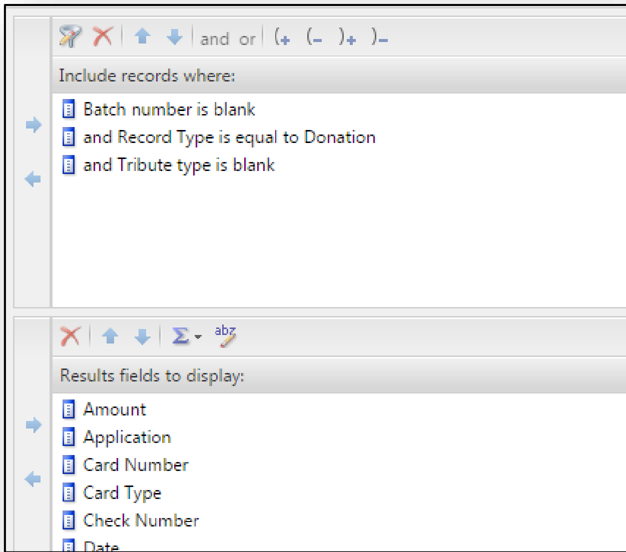
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, Donations (new gifts) are captured in the two separate query imports: the "Gifts Query Import" process and the "Tributes Query Import" process. These payments can be further broken out into separate batch templates as needed.

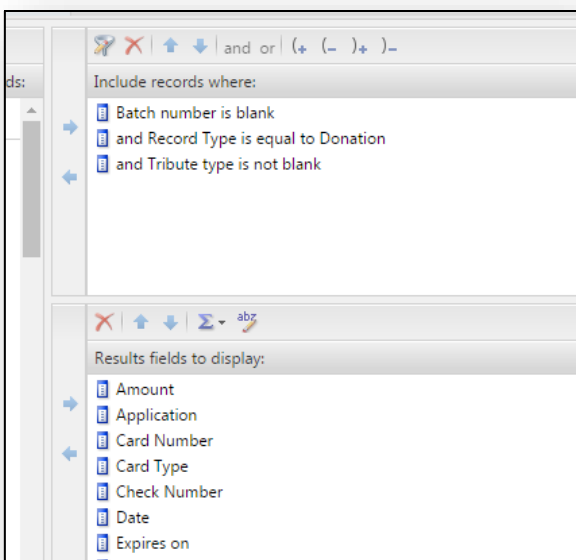
For more information on this functionality, refer to the *Overview* section within Revenue.

QUERY

By default, gifts without tribute details are pulled out of the staging table in the "Luminate Online Staged Revenue - Gifts" query. The standard query criteria are as follows:



Gifts with tribute details are pulled out of the staging table in the "Luminate Online Staged Revenue - Tributes" query. The standard query criteria are as follows:



BATCH TEMPLATE

The "LO Sync - Gifts" and "LO Sync - Tributes" batch templates are installed with the sync. They both use the OOB "Enhanced Revenue Batch" batch type with a custom extension.

There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted, as needed.

Recurring Gifts

Luminate Online has two types of Recurring Gifts: Installment Payments and Sustaining. Installment Payments allow the donor to select the total amount and determine how often they plan to pay and an end date. Sustaining allows the donor to select an amount to be charged on a recurring basis with no end date.

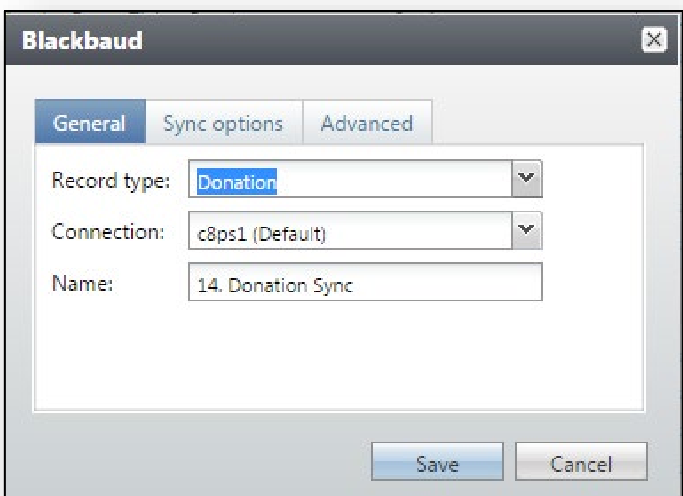
The "Child Sync" for Recurring Gift Master Records is built into the Donation Sync. It is a one-way sync from **Luminate Online** to **Blackbaud CRM**. New sustaining and installment payment gifts and certain updates are brought into an Enhanced Revenue Batch to create a recurring gift commitment record. For sustaining gifts, the revenue's lookup ID will be set to 'SUS-' + the LO transaction ID. For installment payment gifts the revenue's lookup ID will be set to 'INS-' + the LO transaction ID. Recurring gifts follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.

SYNC PROCESS CONFIGURATIONS

The Recurring Gift Master Record Child Sync Process uses the same configurable options as the Donations Sync. They can be set based as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Donations Sync).

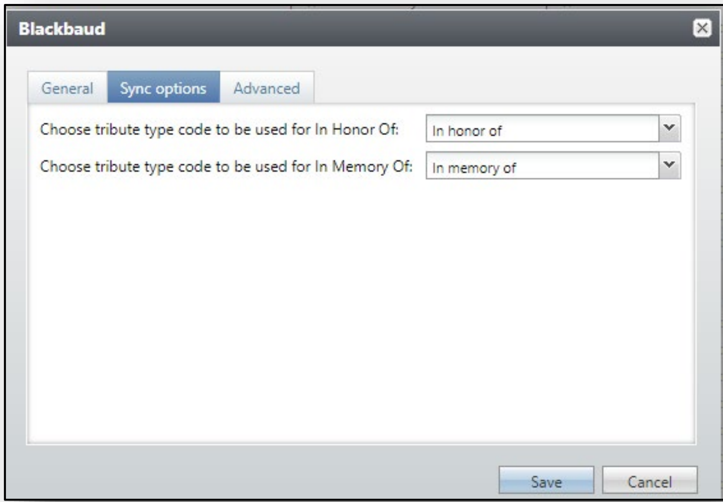
GENERAL

The default options under the *General* tab should not be changed.



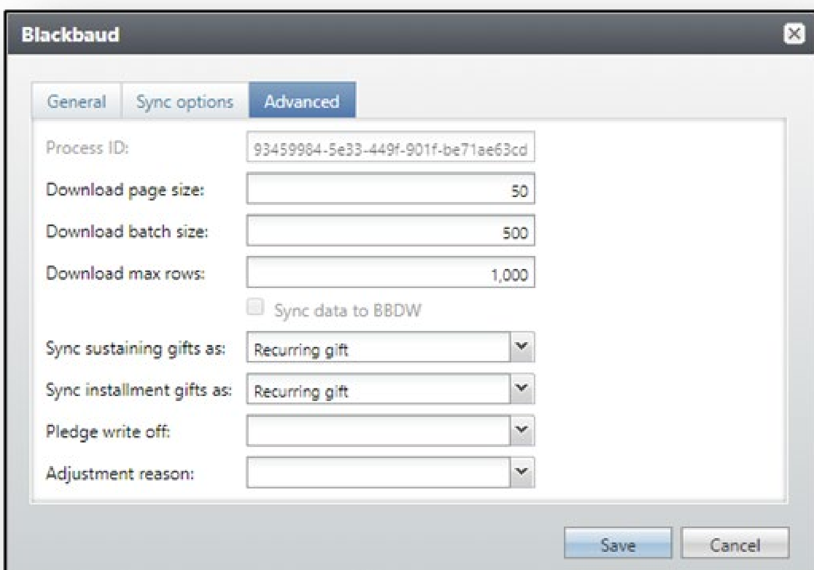
SYNC OPTIONS

The configuration options here apply to tribute gifts and are not for the Recurring Gift Child Sync. For more information about setting these see the *Tributes* section of the Donations sync.



ADVANCED

Under the *Advanced* tab, there are several configuration options available for the child sync. All of these options will need to be configured when the **LO-CRM Integration** is first installed in the **BBCRM** environment.



Configuration Name	Options	Description

Download batch size	N/A	This setting is used to determine how many records will be processed in one batch and it can still be updated as needed. The minimum value is 100 and the maximum value is 500 (for performance reasons). The value should be a multiple of 100. **Blackbaud** recommends using the default value of 500.
Download max rows	N/A	This setting is used to determine how many records will be processed from **Blackbaud CRM** to **Luminate Online** and can be updated as needed. The minimum value is 50 and the value should be a multiple of 50. **Blackbaud** recommends using the default value of 20,000.
Sync sustaining gifts as	Recurring Gift Pledge	When **Recurring gift** is selected, sustaining gifts in **LO** (those with no end date) will create a recurring gift commitment in **BBCRM.** When **Pledge** is selected, sustaining gifts in **LO** (those with no end date) will create a pledge commitment in **BBCRM.**
Sync installment gifts as	Recurring Gift Pledge	When **Recurring gift** is selected, installment gifts in **LO** (those with an end date) will create a recurring gift commitment in **BBCRM.** When **Pledge** is selected, installment gifts in **LO** (those with an end date) will create a pledge commitment in **BBCRM.**
Pledge write off	Values from the "Pledge Write-off Reason" code table in BBCRM	If **Pledge** is selected for either of the above, when the commitment in **LO** is decreased a pledge write-off will be created in **BBCRM** and the write-off reason code selected here will be used.
Adjustment reason	Values from the "Adjustment Reason" code table in BBCRM	If **Pledge** is selected for either of the above, when the commitment in **LO** is increased (and if the pledge was posted to the General Ledger) an adjustment will be created in **BBCRM** and the adjustment reason code selected here will be used.

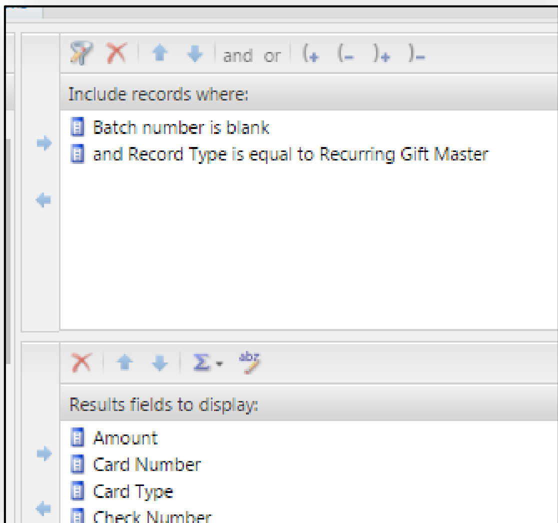
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, recurring gift master records are captured in the "Recurring Gift Master Record Query Import" process. These payments can be further broken out into separate batch templates as needed.

For more information on this functionality, refer to the *Overview* section within Revenue.

QUERY

By default, recurring gift master records are pulled out of the staging table in the "Luminate Online Staged Revenue - Recurring Gifts" query. The standard query criteria are as follows:



BATCH TEMPLATE

The "LO Sync - Recurring Gift Master Records" batch template is installed with the sync. It uses the OOB "Enhanced Revenue Batch" batch type with a custom extension.

There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted, as needed.

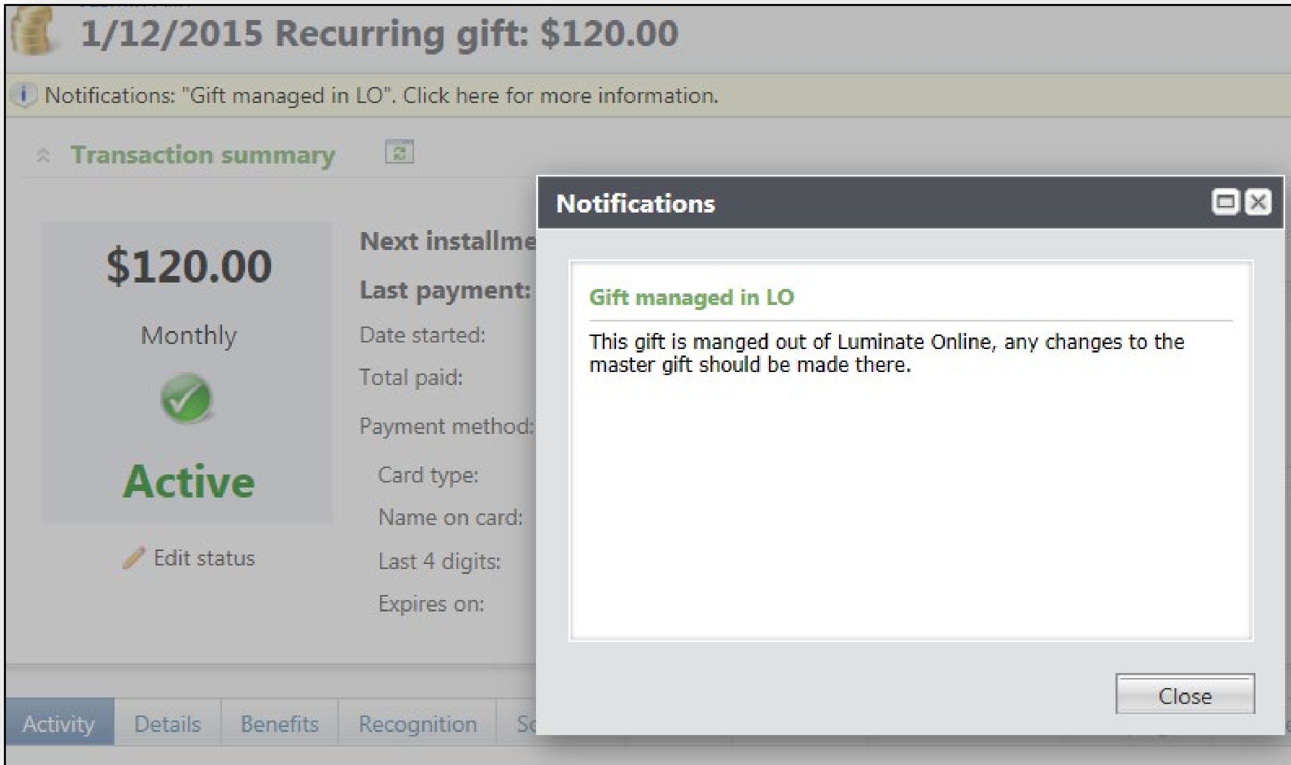
Recurring Gift Updates

OVERVIEW

The Recurring Gift Update Sync is a one-way sync **Luminate Online** to **Blackbaud CRM** that allows the status and amount for sustainer gifts to be updated on the **BBCRM** recurring gift commitment record.

Amount updates and status changes will transfer from **LO** to **BBCRM**. In order for status updates to flow, the **Luminate Online** statuses must be mapped to the **BBCRM** recurring gift statuses and status change reason codes on the *Mappings* tab > *Recurring Gift Status* sub-tab available on the Luminate Online Sync Setup page.

As the Recurring Gift Master Record Child sync is a one-way sync, any updates to the gift in **BBCRM** will not transfer back into **LO**. By default, all recurring gifts originating in **Luminate Online** will be flagged with a notification informing users that the record should not be modified in **BBCRM**.



Either system can be the system of record for entering and maintaining recurring gift (sustaining gifts).

The following scenarios should be reviewed to best help make that determination:

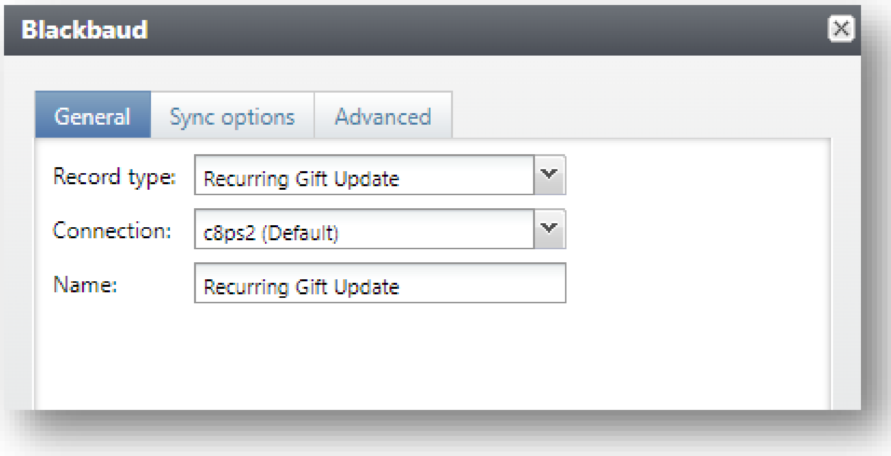
- *If the business decides a constituent needs the ability to change or cancel the recurring gift online*, the recurring gift should be entered into and maintained in **Luminate Online** as a sustaining gift.
- If the business allows the constituent to make the recurring gift commitment offline and the recurring gift does not need to be updated online, the recurring gift should be entered and maintained in **BBCRM**. Credit cards and direct debits do not automatically process on a monthly basis in **BBCRM**; processes must be setup and run each month.

SYNC PROCESS CONFIGURATIONS

The Recurring Gift Update Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Recurring Gift Update Sync).

GENERAL

The default options under the *General* tab should not be changed.

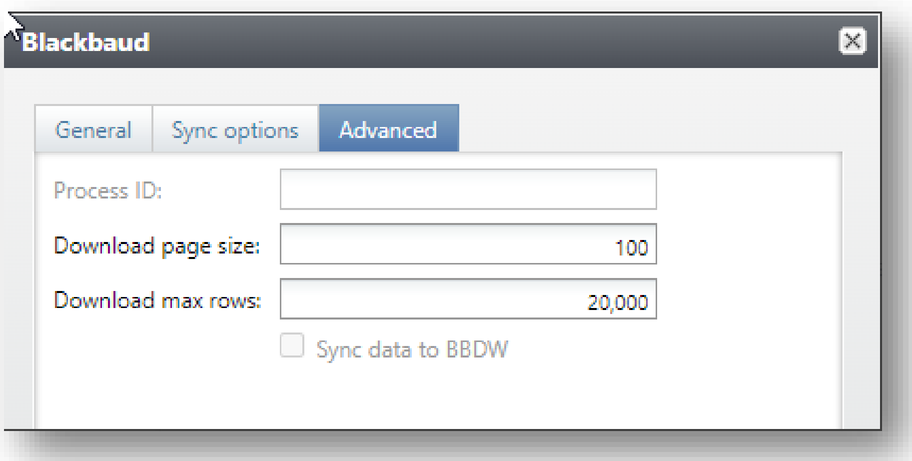


SYNC OPTIONS

There are no options under the *Sync Options* tab for this sync process.

ADVANCED

The default options under the *Advanced* tab should not be changed.



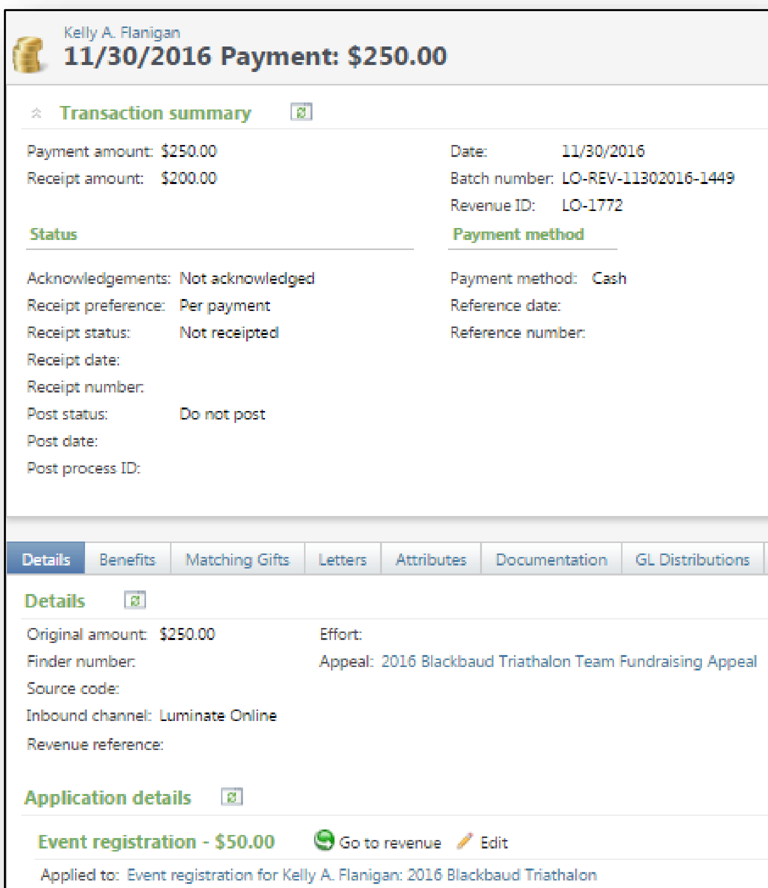
Note — While still on the page with the Sync Process List, click **Set seed date** in the tasks in the upper left, select "Recurring Gift Update" for the record type and set the seed date/time to the last time the Donation sync ran. Going back a little further is normally safer to make sure you don't miss any new data. **You only need to set the seed date for this sync the first time it's run**, after that it will just run based on the last time it completed like the other syncs do.

Note — It is recommended to have this sync process run AFTER the query import processes.

TeamRaiser Registrant Payments

OVERVIEW

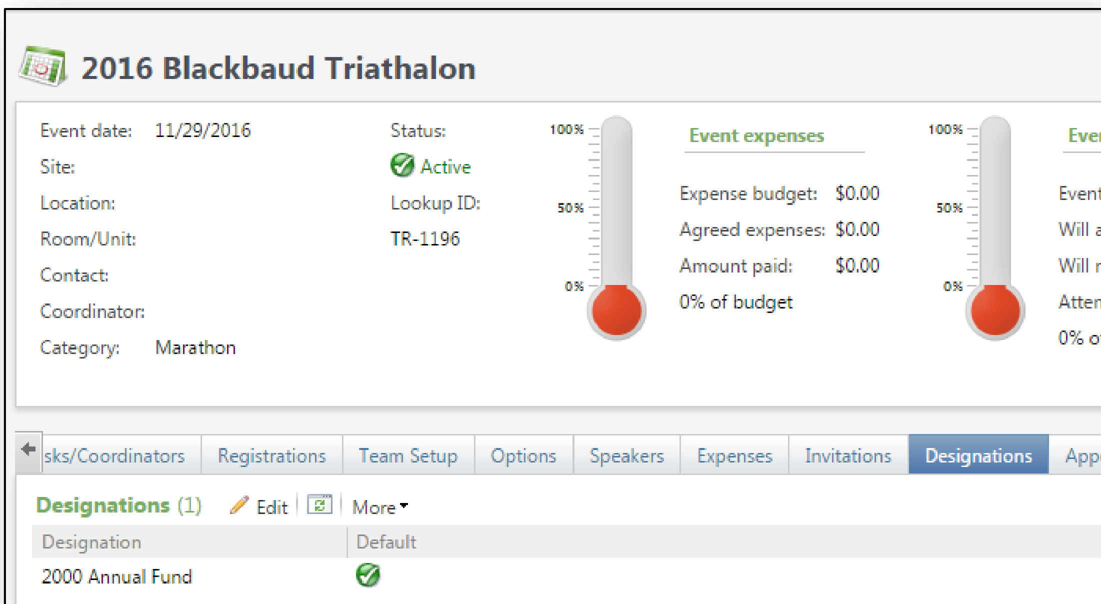
The TeamRaiser Registrant Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM** for both new TeamRaiser registrations (covered later) and registration payments. The child sync brings TeamRaiser registration payments into an Enhanced Revenue Batch, as payments with an "Event registration" application towards the associated TeamRaiser event registration. The registration payment's lookup ID will be set to 'LO-' + the LO transaction ID. TeamRaiser registrant payments follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.

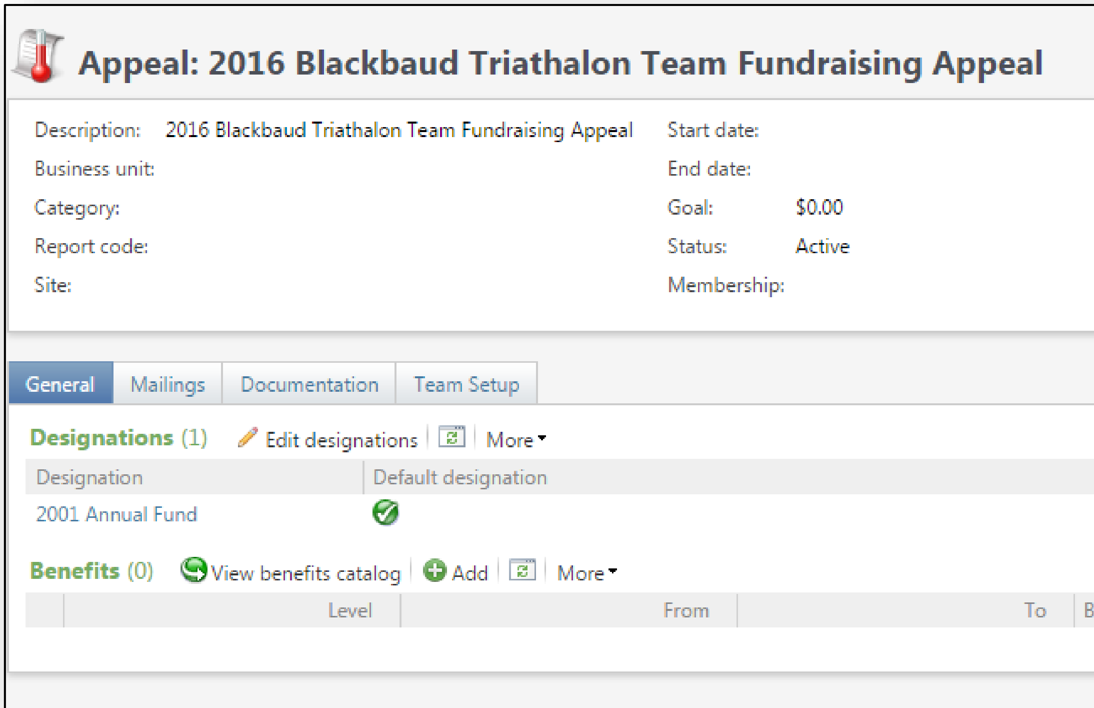


Note — Custom mappings for the TeamRaiser Registrant Payments are done on the Child Custom field mappings on the TeamRaiser Registrant sync. Although the custom field mappings appear to be enabled for TeamRaiser Registrant Payments, if an organization wants to use custom field mappings an additional enhancement specific to that environment is needed. The only field currently available for custom field mappings is Merchant Account ID.

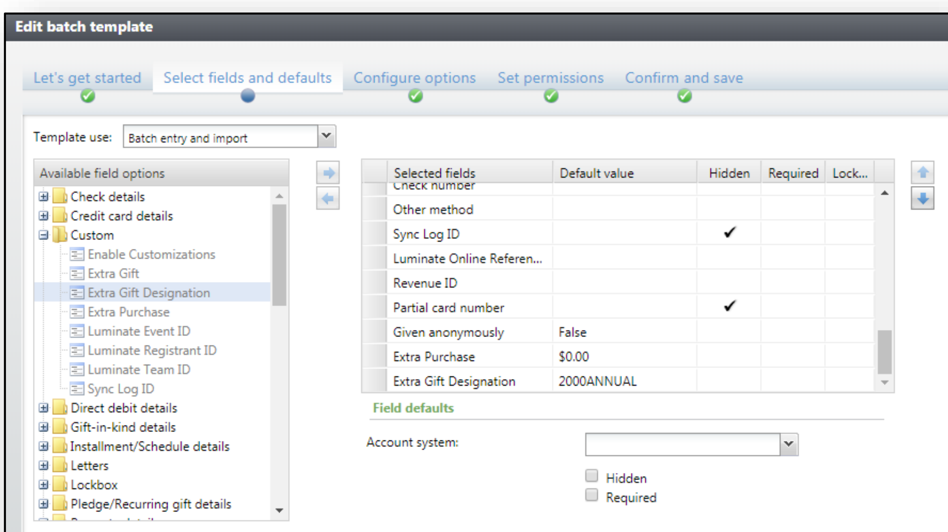
ADDITIONAL GIFTS

Extra gifts made through **LO** at the time of registration will be processed as additional applications in the Enhanced Revenue Batch. They will have an application type of "Donation" and be applied to the event's default designation, which is defined either on the designations tab of the event. If there is no default designation on the event or it is not configured to accept designations, but the Team Fundraising Appeal has a default designation, the the Team Fundraising Appeal's default designation will be used for additional donations.



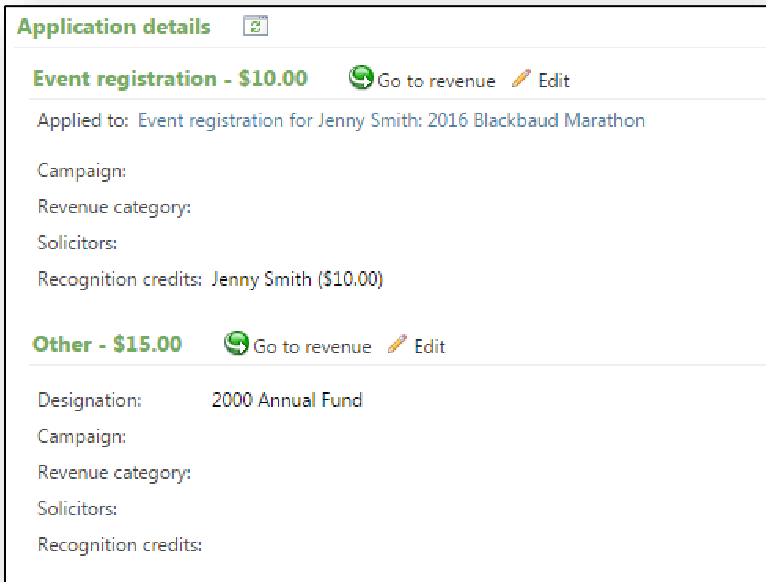


An additional option to provide more flexibility when determining the designation on extra gifts submitted with Calendar and TeamRaiser event registration payments is available in batch "Extra Gift Designation." A designation can be defaulted for these extra gifts by entering the designation public name into the batch template(s) or by mapping it via a custom cross-reference. If this field is not populated, then the previous logic will apply (i.e. using the event or appeal default designation).



UPSELLS

Additional purchases (i.e. "upsells") selected in **LO** at the time of registration will be processed as additional applications in the Enhanced Revenue Batch. They will have an application type of "Other," with an "Other type" of "Event upsell." As with extra gifts, these will be applied to the event's default designation. If there is no default designation on the event or it is not configured to accept designations, but the Team Fundraising Appeal has a default designation, the the Team Fundraising Appeal's default designation will be used instead.



REVENUE APPEAL

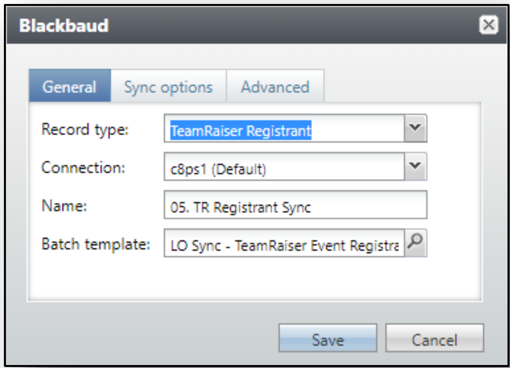
Any event revenue processed by the TeamRaiser Registration Payments sync will automatically inherit the Team Fundraising Appeal for that event. This is necessary to ensure that team fundraising totals are accurately reflected in **BBCRM**.

SYNC PROCESS CONFIGURATIONS

The TeamRaiser Registrant Sync Process has some configurable options that can be set based as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Registrant Sync).

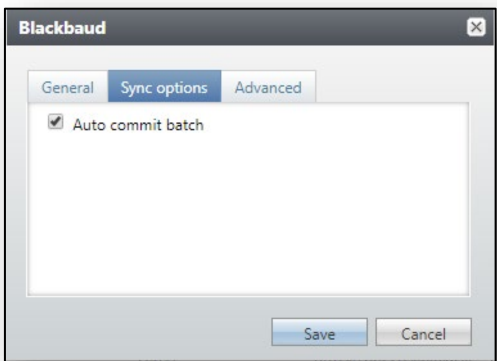
GENERAL

The default options under the *General* tab should not be changed.



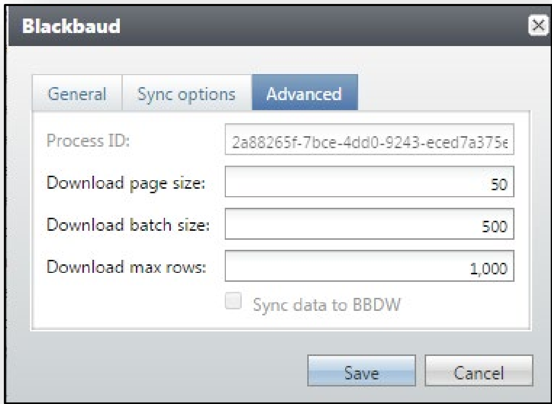
SYNC OPTIONS

There options under the *Sync Options* tab for this sync process apply to the registrant sync and should not be adjusted for the payments.



ADVANCED

The default options under the *Advanced* tab should not be changed.



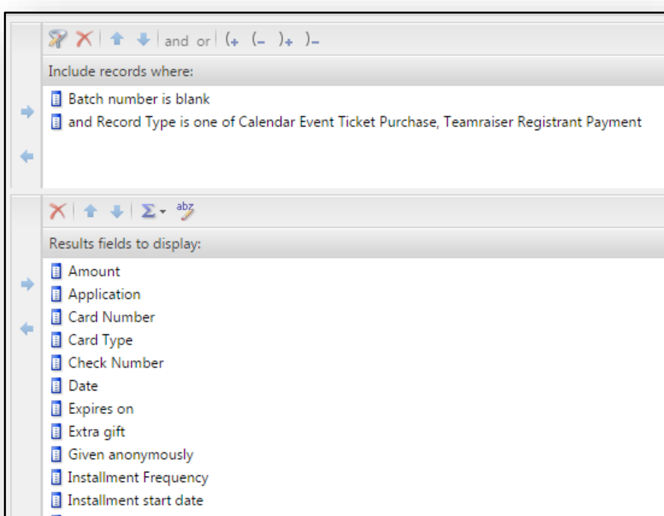
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, TeamRaiser Registration Payments are captured in the "Event Registration Payments Query Import" process. These payments can be further broken out into separate batch templates as needed.

For more information on this functionality, refer to the *Overview* section within Revenue.

QUERY

By default, TeamRaiser Registration Payments are pulled out of the staging table with Calendar Event Ticket Purchases in the "Luminate Online Staged Revenue - Registration Payments" query. The standard query criteria is as follows:



BATCH TEMPLATE

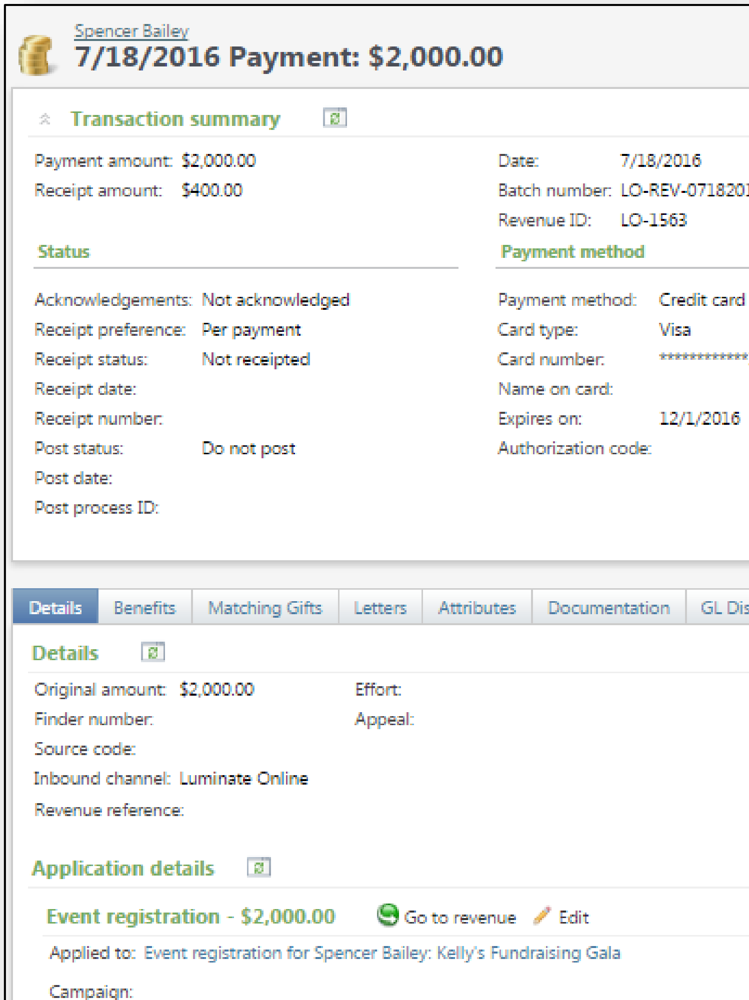
The "LO Sync - Event Registration Payments" batch template is installed with the sync. It uses the OOB "Enhanced Revenue Batch" batch type with a custom extension.

There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted, as needed.

Calendar Event Ticket Purchases

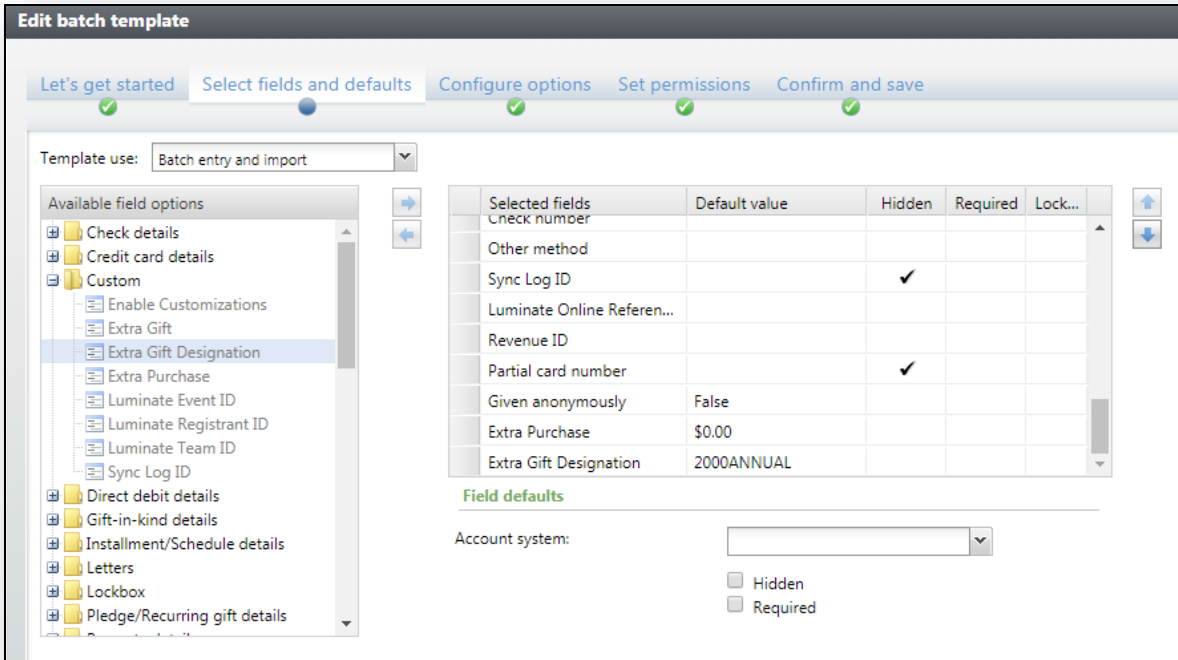
OVERVIEW

The Calendar Event Registrant Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM** for both registrations (covered later) and ticket purchases. The Child sync brings new ticket purchases into an Enhanced Revenue Batch, as payments with an "Event registration" application towards the associated Calendar event registration. The registration payment's lookup ID will be set to 'LO-' + the LO transaction ID. Calendar event ticket purchases follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.



ADDITIONAL GIFTS

Extra gifts made through **LO** at the time of registration will be processed as additional applications in the Enhanced Revenue Batch. They will have an application type of "Donation" and be applied to the event's default designation, which is defined either on the designations tab of the event. If there is no default designation on the event (in **BBCRM**) or it is not configured to accept designations, but there is a Team Fundraising Appeal associated with the event with a default designation (in **BBCRM**), then the Team Fundraising Appeal's default designation will be used for additional donations. An additional option to provide more flexibility when determining the designation on extra gifts submitted with Calendar and TeamRaiser event registration payments is available in batch “Extra Gift Designation.” A designation can be defaulted for these extra gifts by entering the designation public name into the batch template(s) or by mapping it via a custom cross-reference. If this field is not populated, then the previous logic will apply (i.e., using the event or appeal default designation).



MULTIPLE TICKET PURCHASES IN ONE PAYMENT

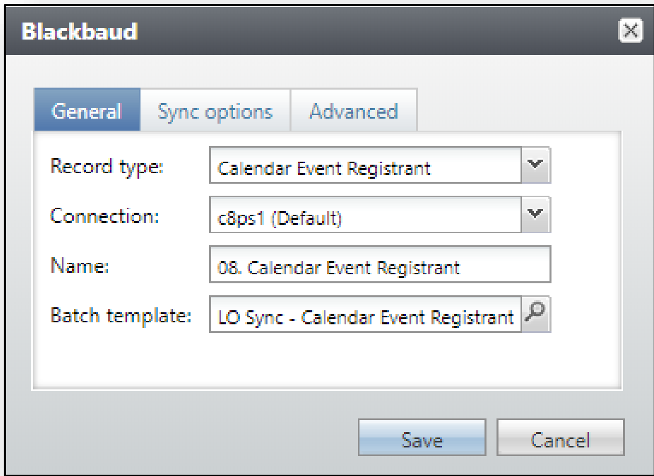
If donors purchase tickets for multiple events with one payment in **LO**, the payment is distributed to the appropriate registration.

SYNC PROCESS CONFIGURATIONS

The Calendar Event Registrant Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Calendar Event Registrant Sync).

GENERAL

The default options under the *General* tab should not be changed.



SYNC OPTIONS

Although there is a flag for "Auto-commit batch" on the *Sync Options* tab for this sync process, that is for the batches of registrations. It does not apply to the ticket purchases, as that is controlled by a configuration on the query import.

The “Sync additional ticket purchases checkbox” allows additional ticket purchases, regardless of ticket type, to be added to the existing registration for that constituent as unnamed guests.

ADVANCED

The default options under the *Advanced* tab should not be changed.

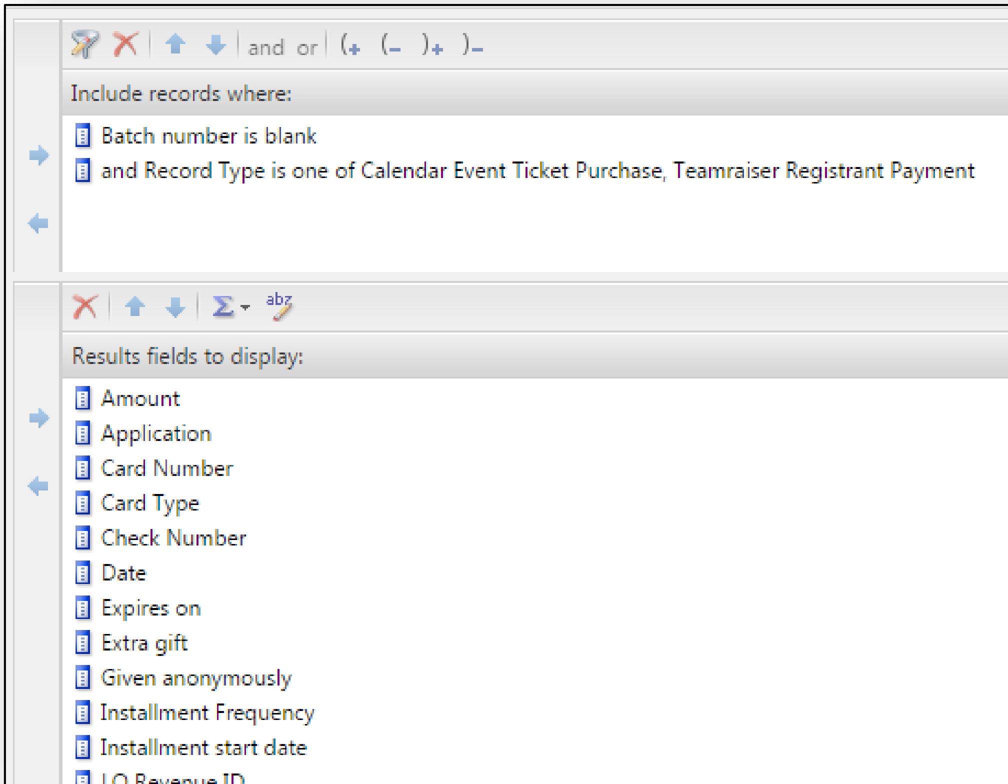
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, Calendar Event Ticket Purchases are captured in the "Event Registration Payments Query Import" process. These payments can be further broken out into separate batch templates as needed.

For more information on this functionality, refer to the *Revenue* section.

QUERY

By default, Calendar Event Ticket Purchases Payments are pulled out of the staging table with TeamRaiser Registrant Payments in the "Luminate Online Staged Revenue - Registration Payments" query. The standard query criteria is as follows:



BATCH TEMPLATE

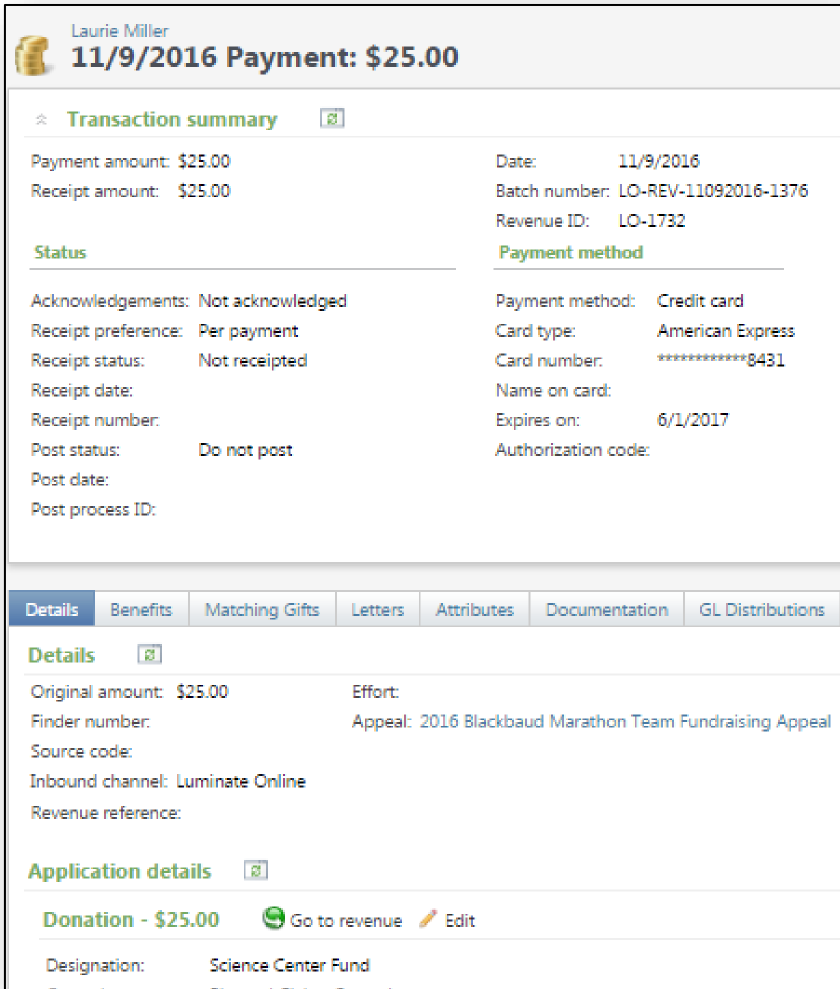
The "LO Sync - Event Registration Payments" batch template is installed with the sync. It uses the OOB "Enhanced Revenue Batch" batch type with a custom extension.

There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted as needed.

TeamRaiser Gifts

OVERVIEW

The TeamRaiser Gifts Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. New TeamRaiser gifts are brought into an Enhanced Revenue Batch as donations. The registration payment's lookup ID will be set to 'LO-' + the LO transaction ID. TeamRaiser gifts follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch. TeamRaiser gifts follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.



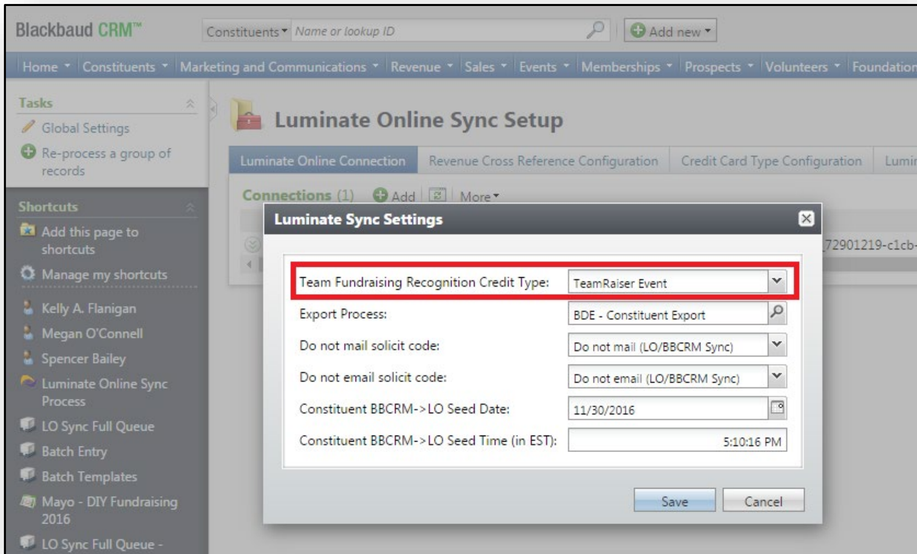
REVENUE APPEAL

Any TeamRaiser Gifts will automatically inherit the Team Fundraising Appeal for that event. This is necessary to ensure that team fundraising totals are accurately reflected in **BBCRM**.

RECOGNITION CREDITS

If the TeamRaiser gift is made on behalf of a specific registrant, the individual constituent will receive recognition credit on the transaction. If the gift is made on behalf of a team, then the team's constituent group will receive recognition credit. The recognition credit type used is configured under Administration > Data Integration > Sync Setup Option > Global Settings. It is defaulted to TeamRaiser Event on initial setup, but can be changed based if neded.

Note — These TeamRaiser recognition credits will not appear in the batch but will surface on the revenue record once the batch has been committed.

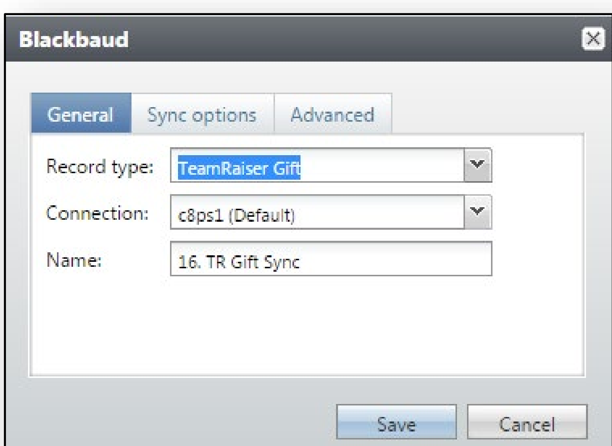


SYNC PROCESS CONFIGURATIONS

The TeamRaiser Gifts Sync Process has some configurable options that can be set based as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Gifts Sync).

GENERAL

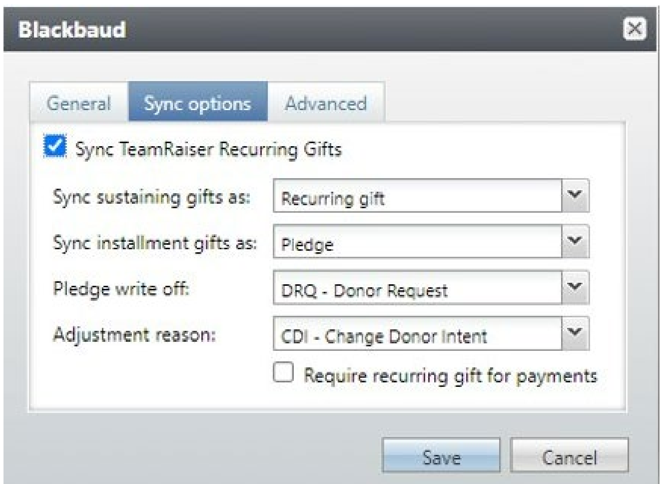
The default options under the *General* tab should not be changed.



SYNC OPTIONS

There is an option on the TeamRaiser Gift sync to sync TeamRaiser Recurring Gifts. This is defaulted to be turned off and must be manually enabled. Sync options include the ability to select how sustaining gifts and installment gifts will sync over as well as pledge write off and adjustment reason codes.

The sync does NOT include a process for syncing over the recurring gifts for older records. This is designed to work for version 4.0.31 and beyond. The option to 'require recurring gift payments' is defaulted to off and this option would force payments to require a recurring gift in order to be created, this is especialy important for syncing older recurring gift records. If there is no recurring gift to apply to and previous payments were created as standalone donations, then new payments for that recurring gift will also be standalone.



ADVANCED

The default options under the *Advanced* tab should not be changed.

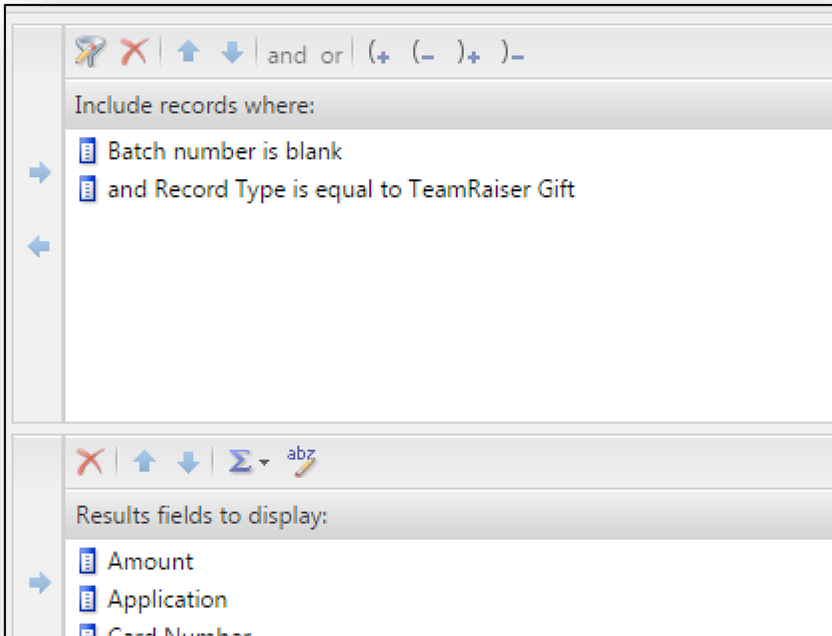
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, TeamRaiser Gifts are captured in the "TeamRaiser Gifts Query Import" and "TeamRaiser Gift Tributes Query Import" processes. These payments can be further broken out into separate batch templates as needed.

For more information on this functionality, refer to the *Revenue* section.

QUERY

By default, TeamRaiser Gifts are pulled out of the staging table in the "Luminate Online Staged Revenue - TeamRaiser Gifts" query. The standard query criteria is as follows:



BATCH TEMPLATE

The "LO Sync - TeamRaiser Gifts" batch template is installed with the sync. It uses the OOB "Enhanced Revenue Batch" batch type with a custom extension.

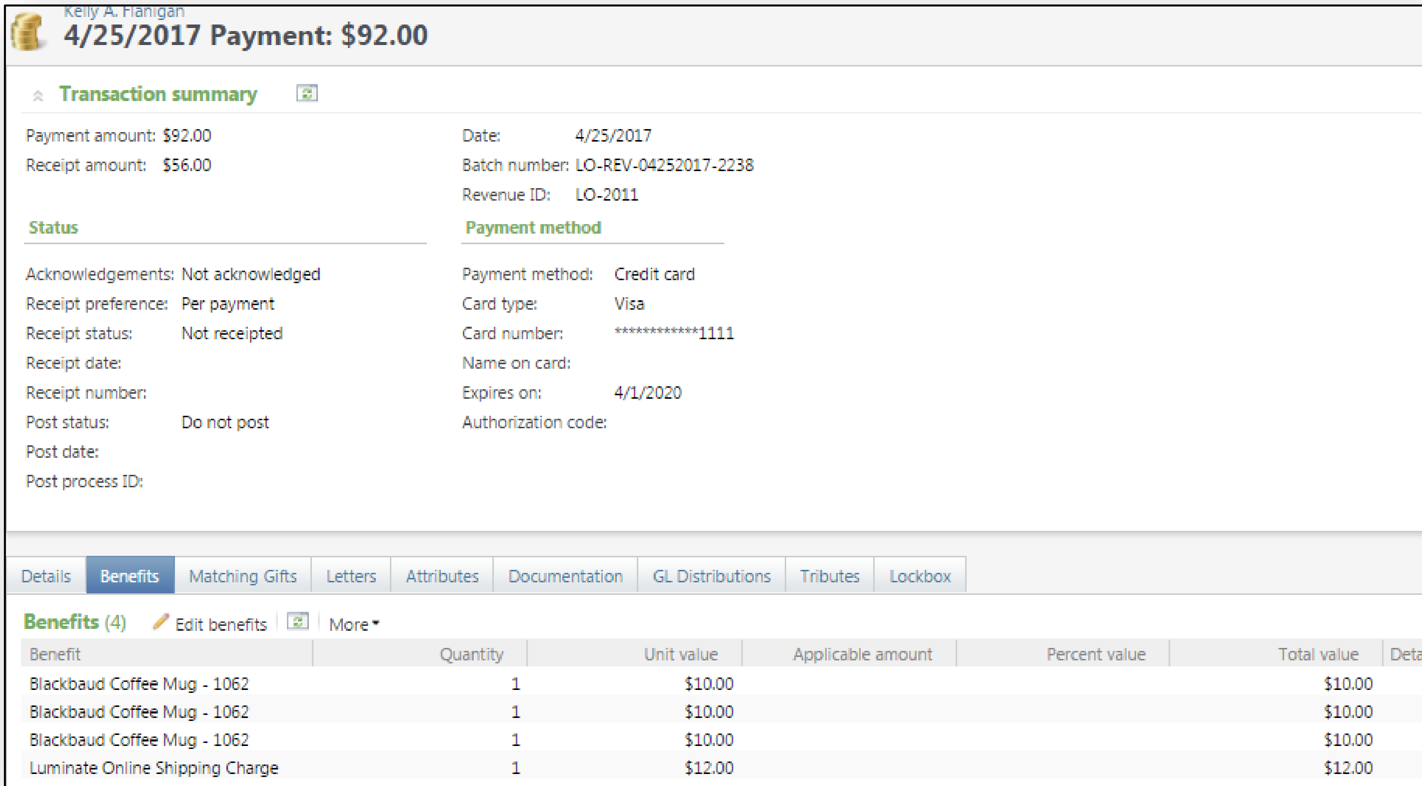
There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted as needed.

eCommerce Purchases

OVERVIEW

The eCommerce Revenue Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. New eCommerce purchases are brought into an Enhanced Revenue Batch with an application type of "Other" and other type of "Luminate Online store purchase." The revenue's lookup ID will be set to 'LO-' + the LO transaction ID. eCommerce products are synced as benefits on the transaction. The benefits are created through the eCommerce Products sync. If there are shipping charges, an additional "**Luminate Online** Shipping Charge" benefit will be associated with the transaction. Additional donations are included in the overall "Other" application. The receipt amount on the revenue record is equal to the tax-deductible amount from **LO**. eCommerce purchases follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.

eCommerce purchases follow the **LO-CRM Integration** standard revenue workflow and require a query import process to bring them into a batch.

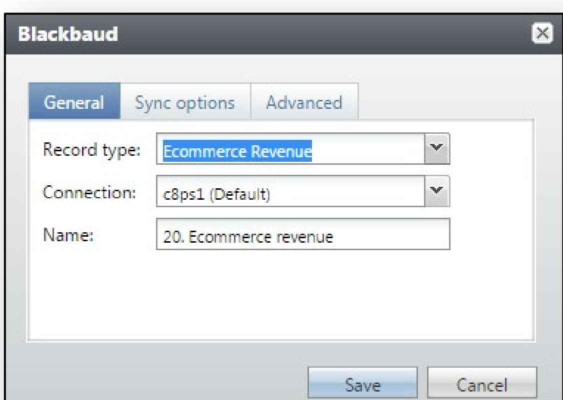


SYNC PROCESS CONFIGURATIONS

The Ecommerce Purchases Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Ecommerce Purchases Sync).

GENERAL

The default options under the *General* tab should not be changed.



SYNC OPTIONS

There are no configuration options under the *Sync Options* tab for this sync process.

ADVANCED

The default options under the *Advanced* tab should not be changed.

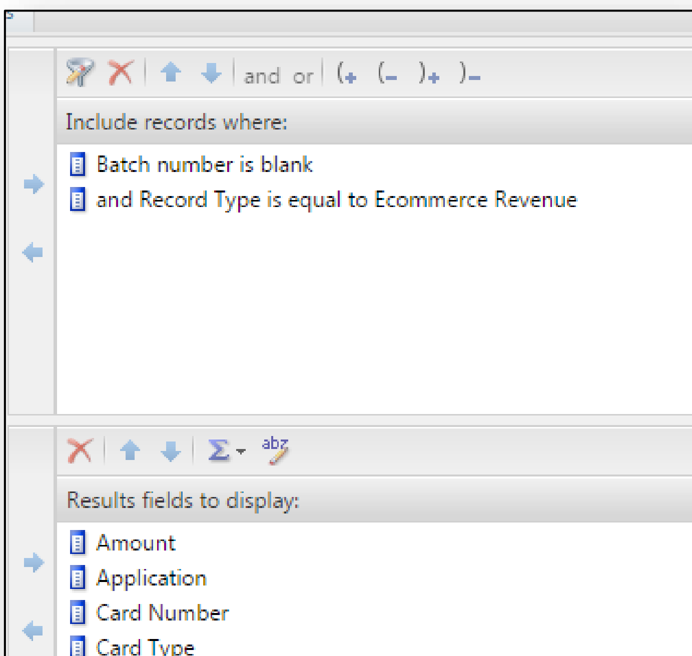
QUERY IMPORT PROCESS

When the baseline **LO-CRM Integration** is installed, eCommerce Revenue is captured in the "eCommerce Query Import" process. These payments can be further broken out into separate batch templates as needed.

For more information on this functionality, refer to the *Revenue* section.

QUERY

By default, eCommerce purchases are pulled out of the staging table in the "Luminate Online Staged Revenue - Ecommerce" query. The standard query criteria is as follows:



BATCH TEMPLATE

The "LO Sync - ECommerce" batch template is installed with the sync. It uses the OOB "Enhanced Revenue Batch" batch type with a custom extension.

There are several columns not used by the sync included in the Enhanced Revenue Batch (i.e. attribute, reference number). These can be defaulted as needed.

Refunds

OVERVIEW

The Refund Sync Process has been introduced in version 4.0.33 to allow refunds to sync from **LO** to **BBCRM**.

The Refund Sync Process is a one-way sync from **LO** to **BBCRM**. The sync process creates a Revenue Update Batch containing adjustments for the refunded transactions with the amount of the current **LO** transaction. Full and partial refunds are handled through the process.

Note — While the Refund Sync Process will refund registration payments it does not cancel or remove the registration.

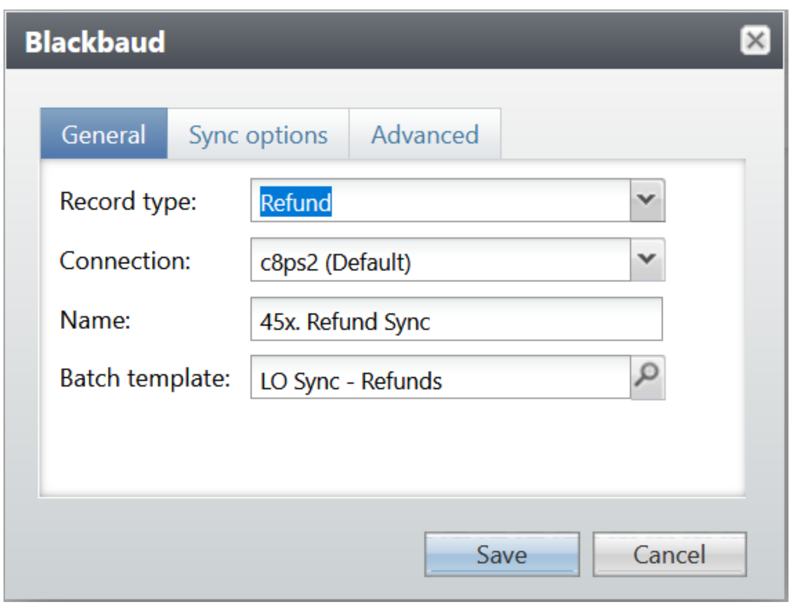
The Refund Sync Process configurations can be downloaded in the Luminate Integration File Download Center and then loaded through the Configuration Import. For more information, refer to the Configure syncing refunds section of the **LO-CRM Connector Installation and Upgrade Guide**.

SYNC PROCESS CONFIGURATIONS

The Refund Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Refund Sync).

GENERAL

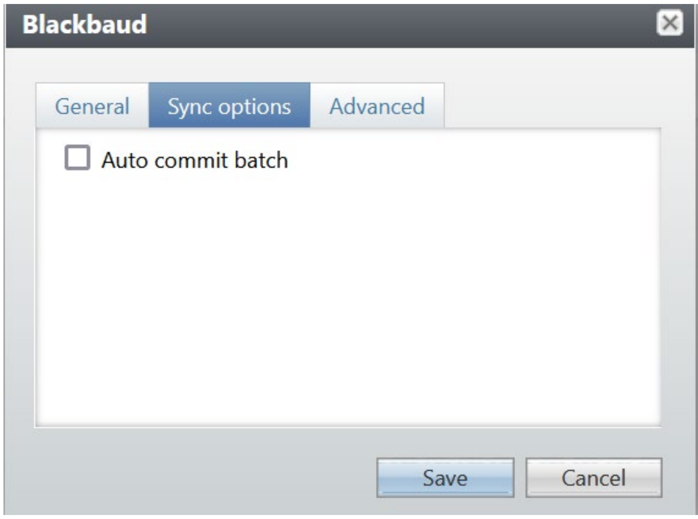
The default options under the *General* tab should not be changed.



SYNC OPTIONS

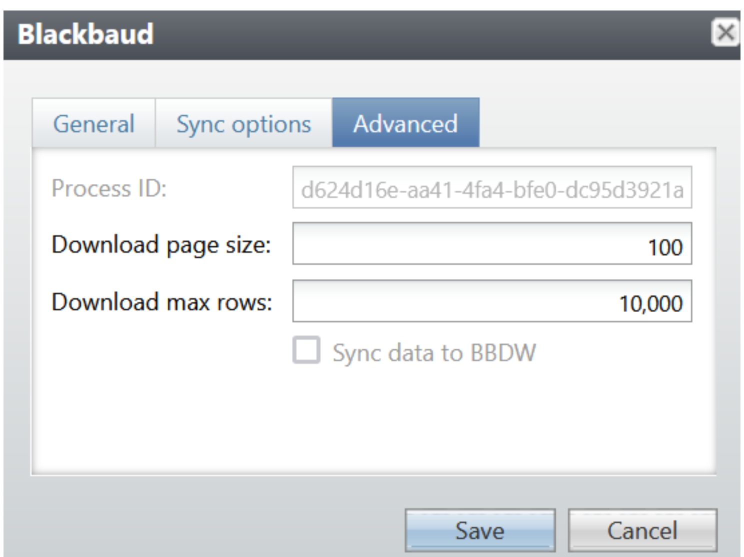
There is an option to mark to Auto commit the batch.

Blackbaud recommends that the "auto-commit batch" flag is not marked, so that the Refund transactions can be reviewed within batch before committing. The option can be changed if needed.



ADVANCED

The default options under the *Advanced* tab should not be changed.



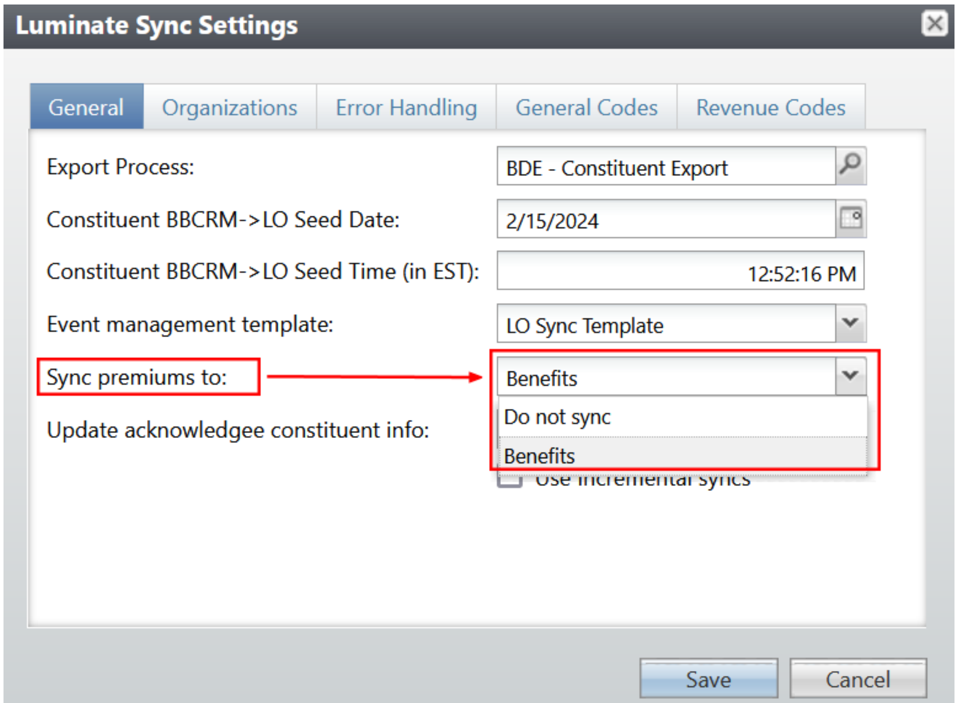
BATCH TEMPLATE

The "LO Sync - Refunds" batch template uses the "Revenue Update Batch" batch type.

Premiums

OVERVIEW

The Premium Log Sync is a one-way sync from **LO** to **BBCRM**. As of version 4.0.36 an option has been added to the Global Settings to allow premiums to sync from **LO** to **BBCRM** as benefits.



- If sync premiums to *Benefits* is chosen, the premiums associated with the **LO** transaction from the Premium Log Sync will be added as a benefit to the **BBCRM** transaction in batch during the query import.
- If sync premiums to *Do not sync* is chosen, the premium data will be added to a custom table and no benefits will be created.

The Premium Log Sync will add benefits for the following revenue record types: Donations, TeamRaiser Gifts, TeamRaiser Registrant Payments, and Personal Fundraising Gifts.

SYNC PROCESS CONFIGURATIONS

The default options for the Premium Log Sync process should not be changed.

The Premium Log Sync should be scheduled to run after the Revenue Syncs but before the Query Import processes.

TEAMRAISER EVENTS

TeamRaiser Events from **Luminate Online** are brought into **Blackbaud CRM** through five separate sync processes:

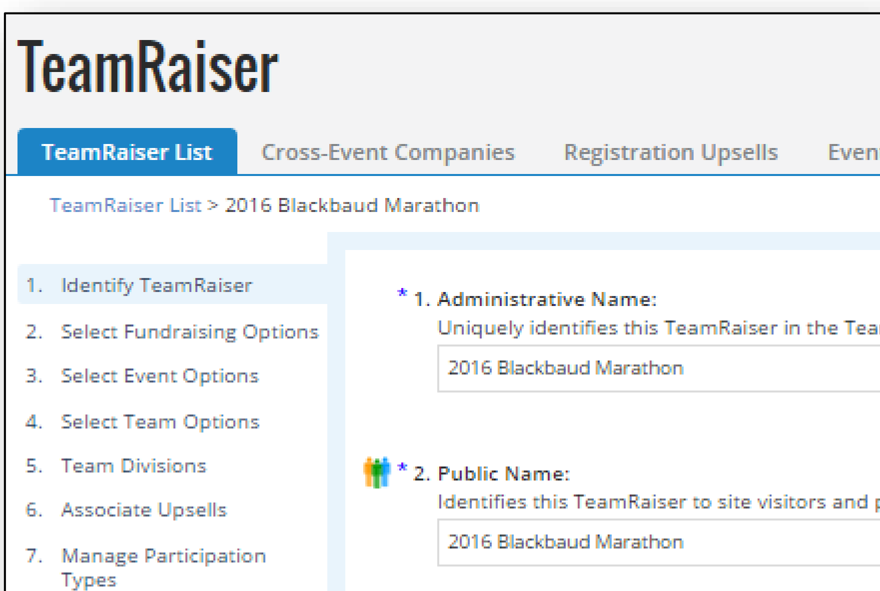
- TeamRaiser Event Sync
- TeamRaiser Participation Types Sync
- TeamRaiser Teams Sync
- TeamRaiser Registrants Sync
- TeamRaiser Team Company Sync (Optional)

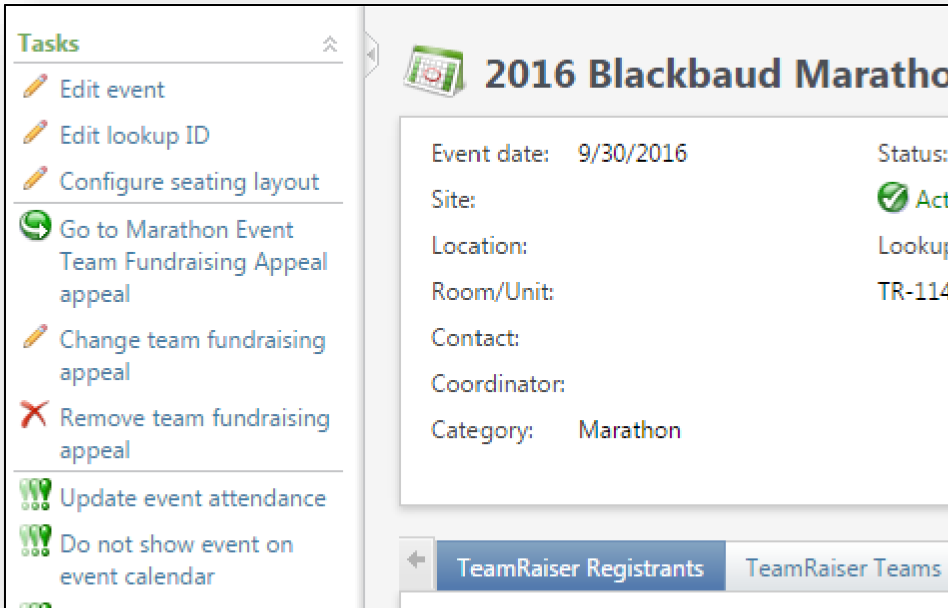
For information on *TeamRaiser Registrant Payments* and *TeamRaiser Gifts*, refer to their corresponding sections within Revenue.

TeamRaiser Event Sync

The TeamRaiser Event Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated TeamRaiser events from **Luminate Online** into the events module of **BBCRM**. (Note: Only active, published events are processed through the TeamRaiser Event Sync.) The TeamRaiser event's lookup ID will be set to 'TR-' + the LO event ID and should not be edited in **BBCRM**.

Note — All new TeamRaiser events created in **BBCRM** must have a default designation on the event or the associated appeal in order to process extra gifts on registration payments.



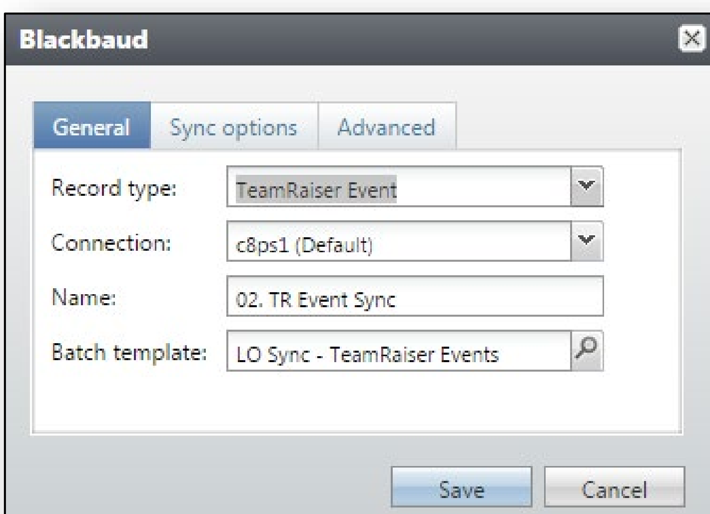


SYNC PROCESS CONFIGURATIONS

The TeamRaiser Event Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Event Sync).

GENERAL

The default options under the *General* tab should not be changed.

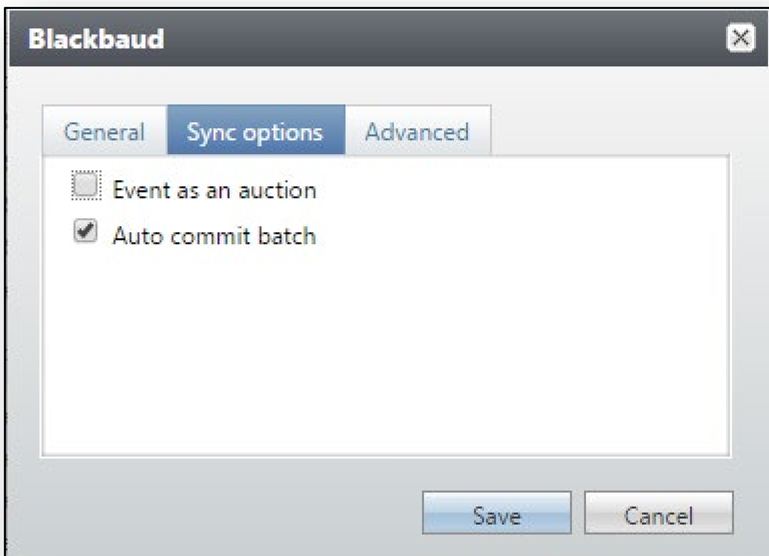


SYNC OPTIONS

Under the *Sync Options* tab, there are two configuration options available:

- **Event as Auction**: If checked, all calendar events processed by the sync will have the "Event is an auction" checkbox checked when they are created.
- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed.

Note — **Blackbaud** strongly recommends that the "auto-commit batch" flag is set, so that records in subsequent syncs (i.e. TeamRaiser Participation Types, TeamRaiser Teams, TeamRaiser Event Registrants) successfully process.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

The "LO Sync - TeamRaiser Events" batch template is installed with the sync. It uses the "Event Batch (Custom)" batch type.

The following columns are not used by the sync, but are available in the batch template:

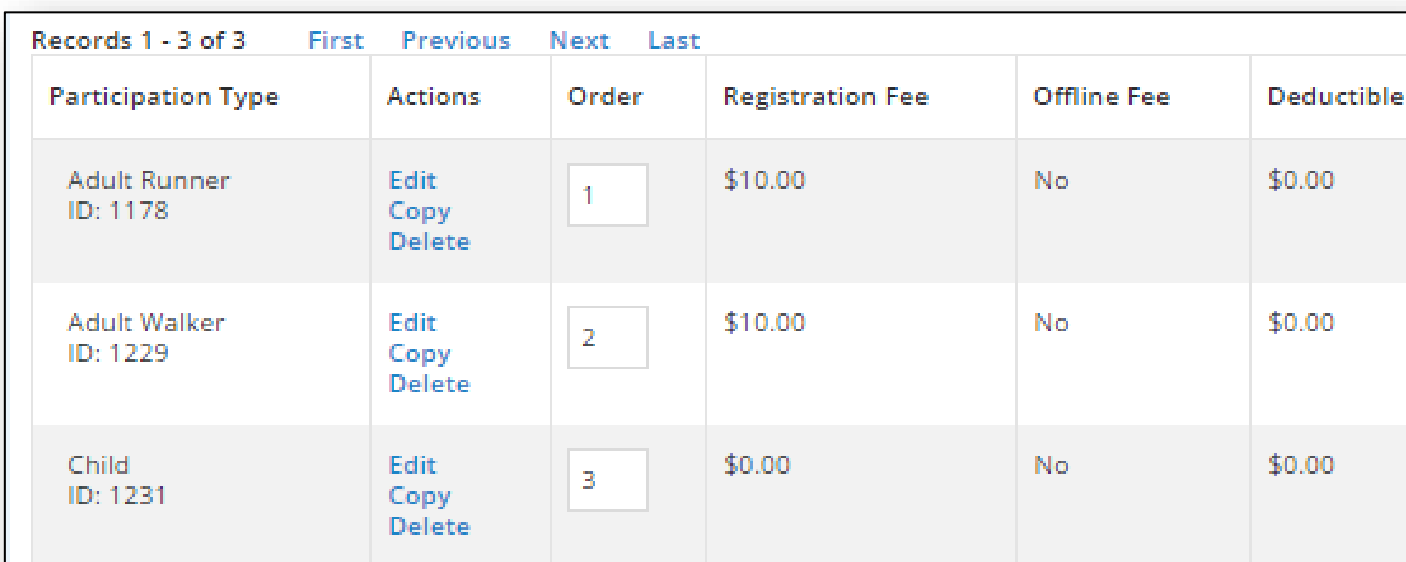
Column Name	Description
Is Auction	This is redundant to the "Event as auction" checkbox on the actual sync process.

Create Team Appeal	When set to "TRUE," **BBCRM** will automatically creates a team fundraising appeal on the event. The appeal will be named "[Event Name] + Team Fundraising Appeal" (i.e. 2016 Blackbaud Marathon Team Fundraising Appeal). If the event name is changed in LO, the appeal name in **BBCRM** does not automatically update. Other fields on these appeal records (i.e. report code, appeal category) are not populated, but can be edited as needed with no impact on the sync. If this is unchecked, appeals must be manually created and associated with the with the event before dependent records can be processed.
Allow Designations on Fees	This can be defaulted based on user preference with no impact on the sync.
Site	This can be defaulted based on user preference with no impact on the sync.

TeamRaiser Participation Types Sync

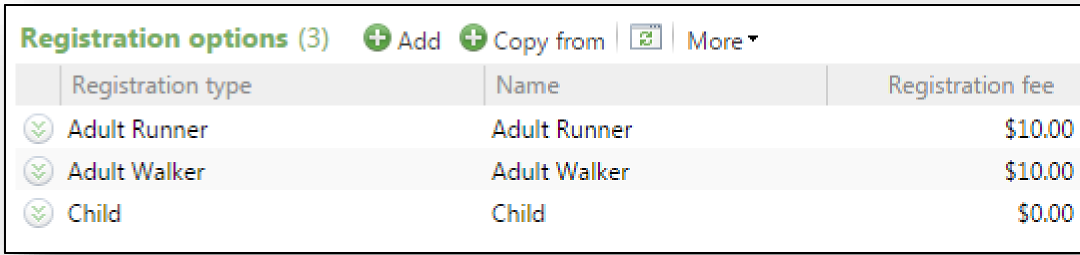
The TeamRaiser Participation Type Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated participation types from **Luminate Online** as registration options of **BBCRM**.

The name of the participation type in **LO** will be brought over as both the registration type and the registration option name in **BBCRM**.



Records 1 - 3 of 3 First Previous Next Last

Participation Type	Actions	Order	Registration Fee	Offline Fee	Deductible
Adult Runner ID: 1178	Edit Copy Delete	1	$10.00	No	$0.00
Adult Walker ID: 1229	Edit Copy Delete	2	$10.00	No	$0.00
Child ID: 1231	Edit Copy Delete	3	$0.00	No	$0.00



SYNC PROCESS CONFIGURATIONS

The TeamRaiser Participation Type Sync Process has some configurable options that can be set based on user preference (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Participation Type Sync).

GENERAL

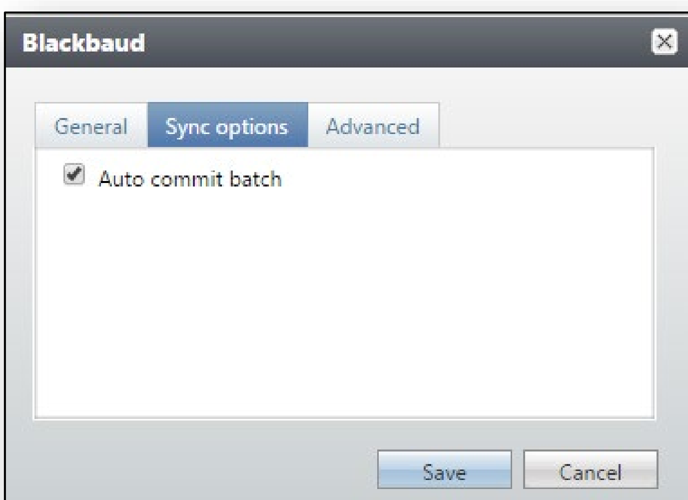
The default options under the *General* tab should not be changed.

SYNC OPTIONS

Under the *Sync Options* tab, there is one configuration option available:

- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed.

Note — **Blackbaud** strongly recommends that the "auto-commit batch" flag is set, so that records in subsequent syncs (i.e. TeamRaiser Event Registrants) successfully process.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

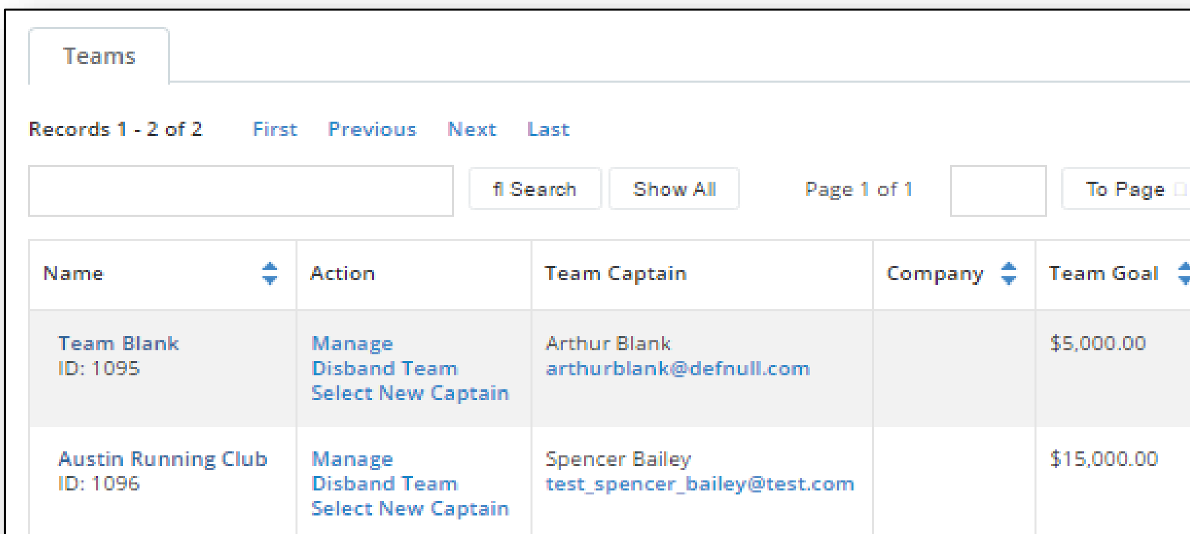
The "LO Sync - Event Options" batch template is installed with this sync. It uses the "Event Option Batch (Custom)" batch type.

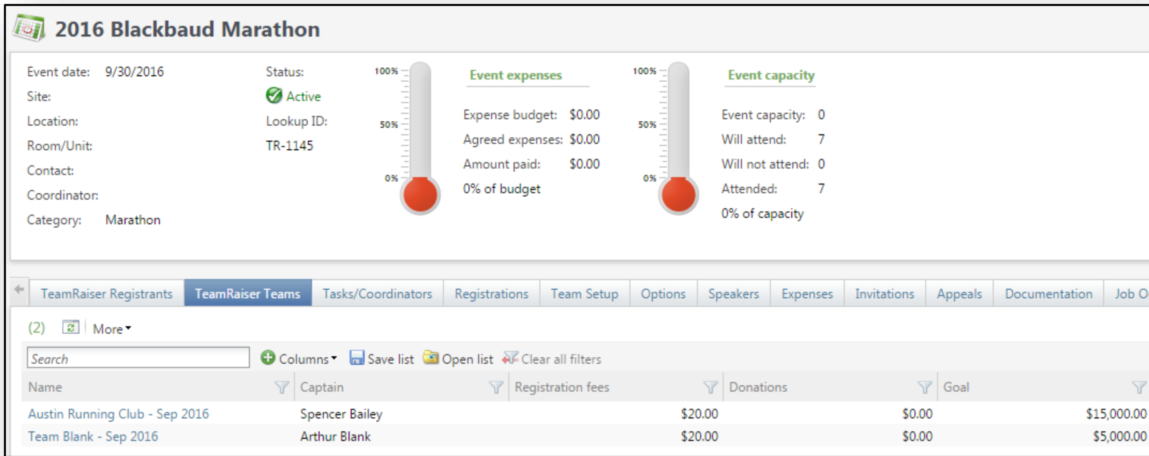
The following columns are not used by the sync, but are available in the batch template:

Column Name	Description
Registration Count	This is defaulted to 1, but can be changed with no impact on the sync.

TeamRaiser Team Sync

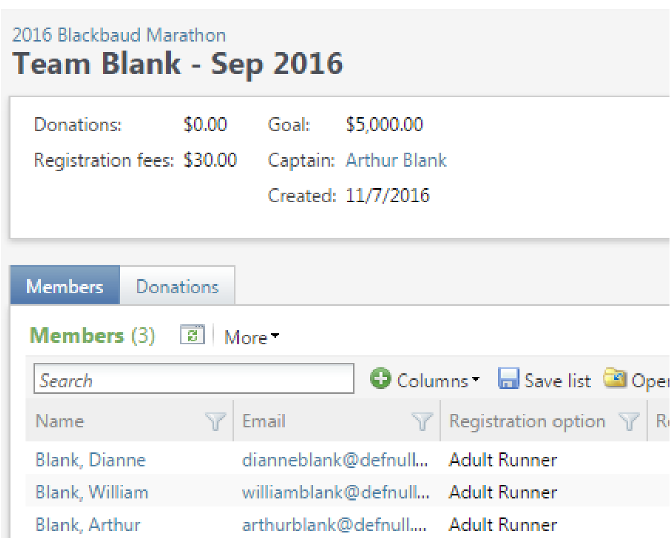
The TeamRaiser Team Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated TeamRaiser teams from **Luminate Online** into **BBCRM** as both team fundraising teams and constituent groups.

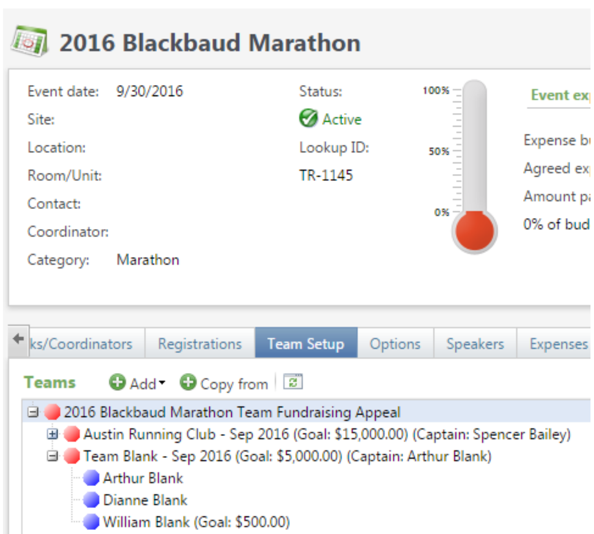




TEAM FUNDRAISING TEAMS

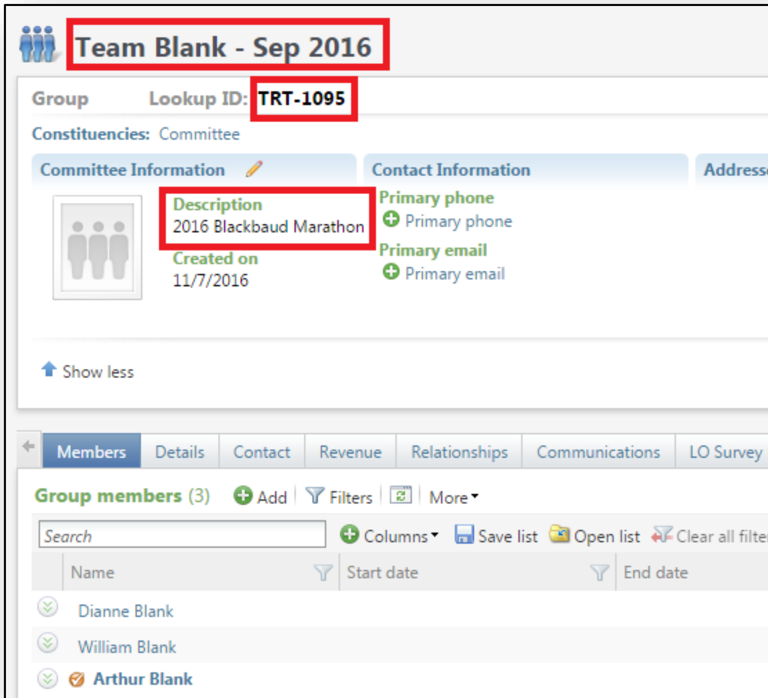
TeamRaiser Teams are added as team fundraising teams in **BBCRM**, with the appropriate team captain and fundraising goal. The team structure is reflected on the Team Setup tab of event page.



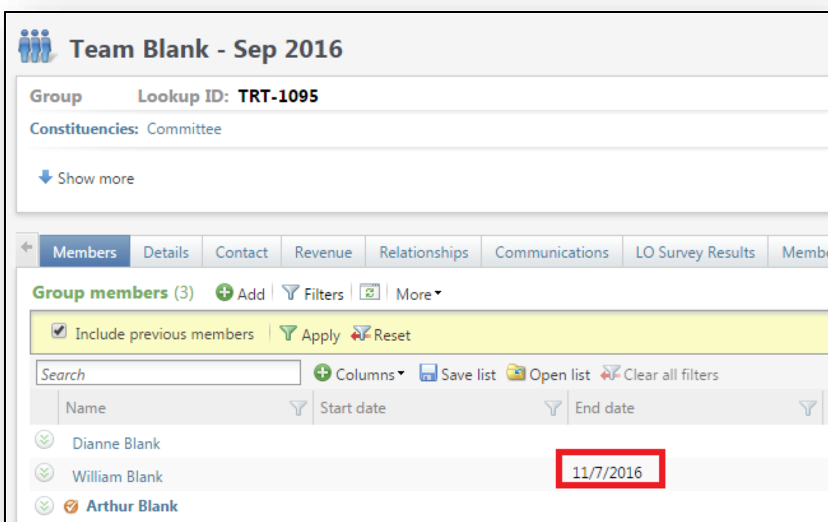


CONSTITUENT GROUPS

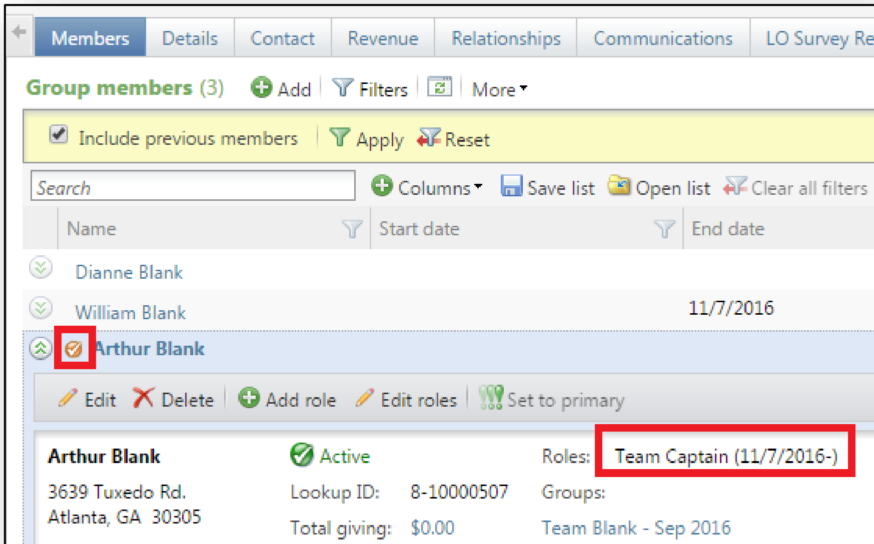
When a new team is created in **BBCRM**, a constituent group is created for that team with a group type of "TeamRaiser Team." The team's lookup ID will be 'TRT-' + the LO team ID and should not be edited in **BBCRM**. The team's name in **Blackbaud CRM** will be the **Luminate Online** team name with the event month and year appended to it and the team's description will contain the event name.



All team members are linked as members of this group, once they are processed through the TeamRaiser Registrant Sync. If team members are removed from the team in **Luminate Online**, they will receive an end-date in **BBCRM**.



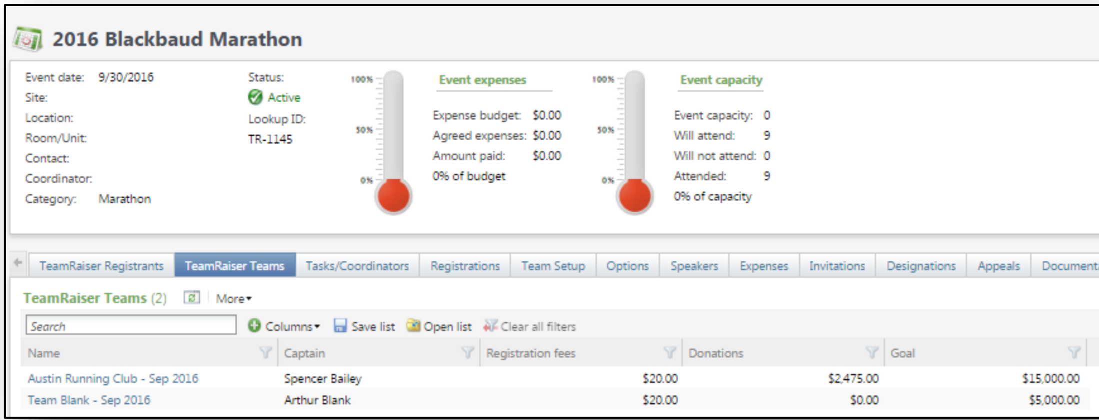
The team captain will be the primary group member. This individual will also have a role of "Team Captain." If the Team Captain is changed in **LO**, the primary member switches, the old captain's role is end-dated, and the new captain receives the "Team Captain" role.



If the team is returning from a previous event, a relationship will be created to link the two constituent groups. The relationship types used are "Prior TeamRaiser team" and "Returning TeamRaiser team."

INTERFACE ENHANCEMENTS

A data list has been added to the event record in **BBCRM**, to allow users to quickly see roll-up information related to TeamRaiser Teams.



SYNC PROCESS CONFIGURATIONS

The TeamRaiser Teams Sync Process has some configurable options that can be set based as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Teams Sync).

GENERAL

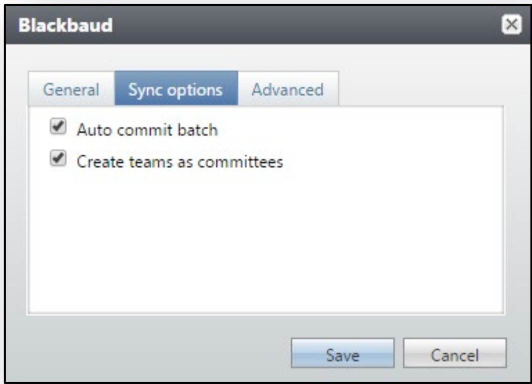
The default options under the *General* tab should not be changed.

SYNC OPTIONS

Under the *Sync Options* tab, the configuration options include:

- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed.
- **Create Teams as Committees**: If checked, all TeamRaiser Team constituent groups will be created with the "Committee" constituency.

Note — **Blackbaud** recommends that the "auto-commit batch" flag is set, so that records in subsequent syncs (i.e. TeamRaiser Registrants) successfully process.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

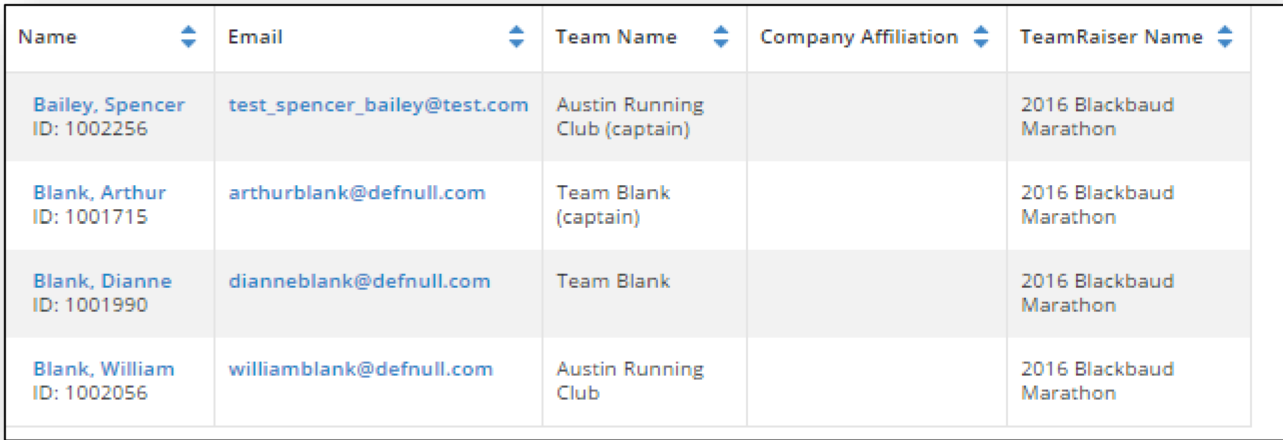
The "LO Sync - TeamRaiser Teams" batch template is installed with this sync. It uses the custom "TeamRaiser Teams Import Batch" batch type.

The following columns are not used by the sync, but are available in the batch template:

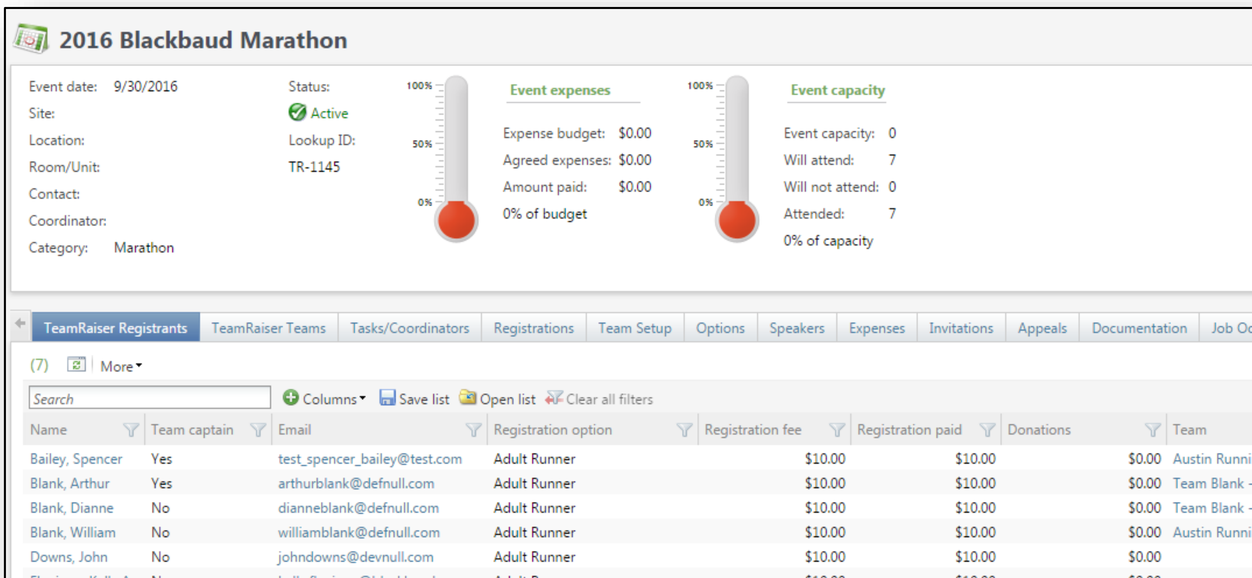
Column Name	Description
Create Committee	This is redundant to the "Create teams as committees" checkbox on the actual sync process.

TeamRaiser Registrant Sync

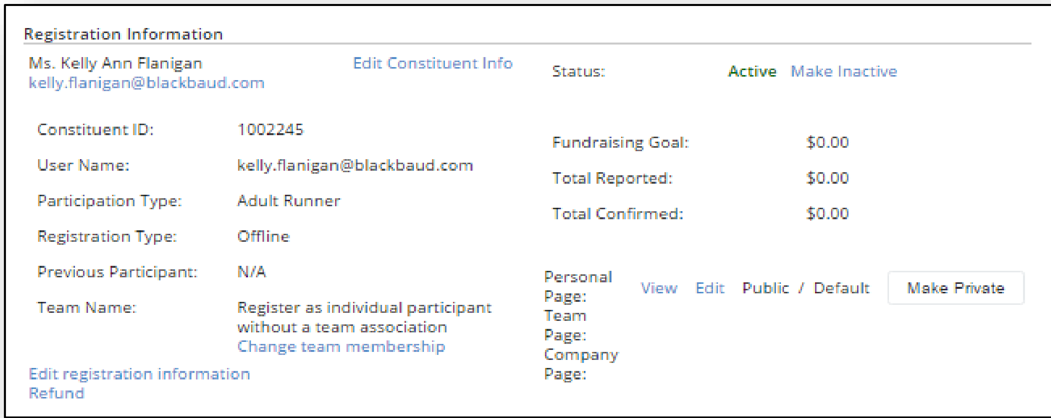
The TeamRaiser Registrant Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new TeamRaiser event participants from **Luminate Online** as event registrants in **BBCRM** (as well as registration payments in the child sync as previously discussed in the Revenue section).

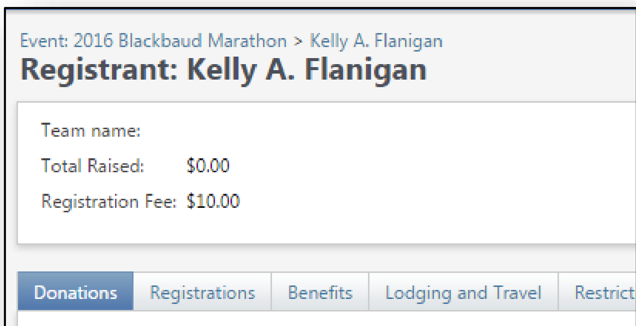


Name	Email	Team Name	Company Affiliation	TeamRaiser Name
Bailey, Spencer ID: 1002256	test_spencer_bailey@test.com	Austin Running Club (captain)		2016 Blackbaud Marathon
Blank, Arthur ID: 1001715	arthurblank@defnull.com	Team Blank (captain)		2016 Blackbaud Marathon
Blank, Dianne ID: 1001990	dianneblank@defnull.com	Team Blank		2016 Blackbaud Marathon
Blank, William ID: 1002056	williamblank@defnull.com	Austin Running Club		2016 Blackbaud Marathon

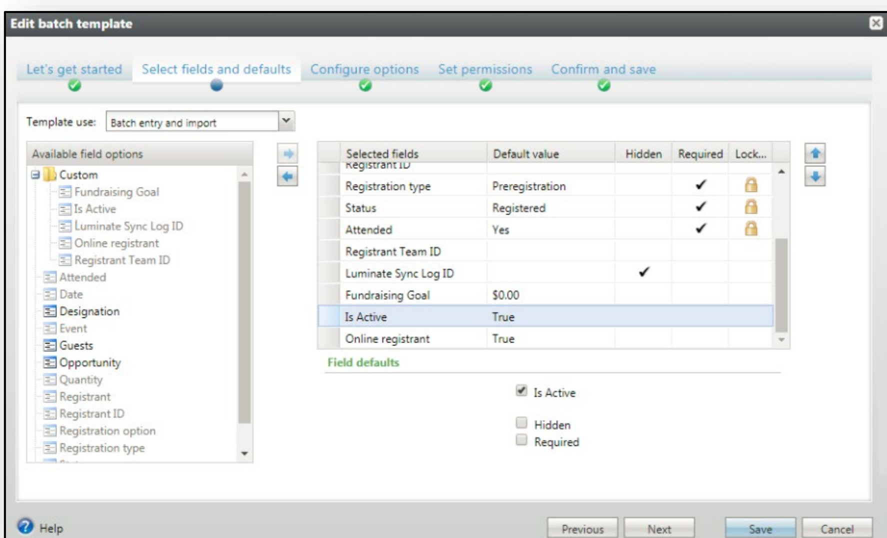


Name	Team captain	Email	Registration option	Registration fee	Registration paid	Donations	Team
Bailey, Spencer	Yes	test_spencer_bailey@test.com	Adult Runner	$10.00	$10.00	$0.00	Austin Runnin
Blank, Arthur	Yes	arthurblank@defnull.com	Adult Runner	$10.00	$10.00	$0.00	Team Blank -
Blank, Dianne	No	dianneblank@defnull.com	Adult Runner	$10.00	$10.00	$0.00	Team Blank -
Blank, William	No	williamblank@defnull.com	Adult Runner	$10.00	$10.00	$0.00	Austin Runnin
Downs, John	No	johndowns@devnull.com	Adult Runner	$10.00	$10.00	$0.00	
Flanigan, Kelly A	No	kelly.flanigan@blackbaud.com	Adult Runner	$10.00	$10.00	$0.00	



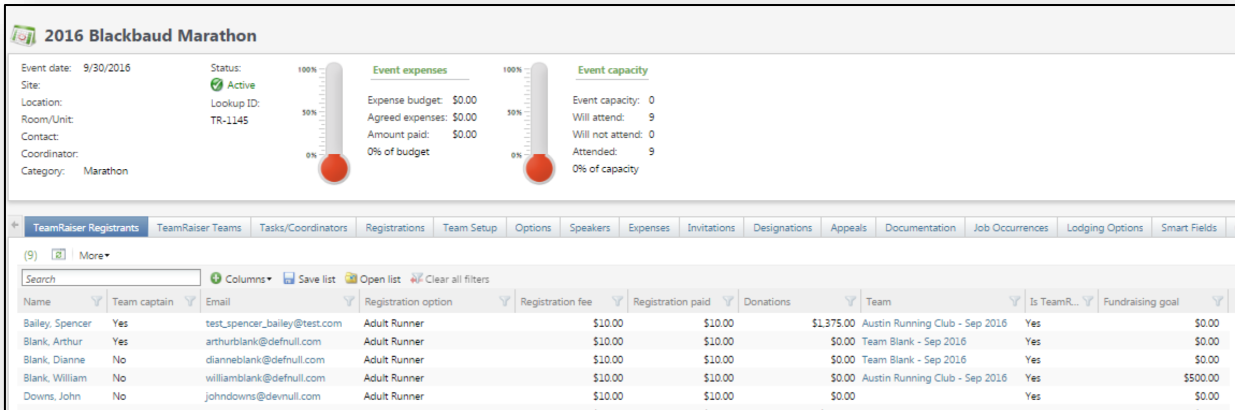


The TeamRaiser Registrant Status field will be set to “active” for all active registrants and will update to “canceled” for any registrants that are marked inactive in **LO**. For this status field to work correctly, the ISACTIVE field needs to be added to the event registrant batch template and defaulted to TRUE.

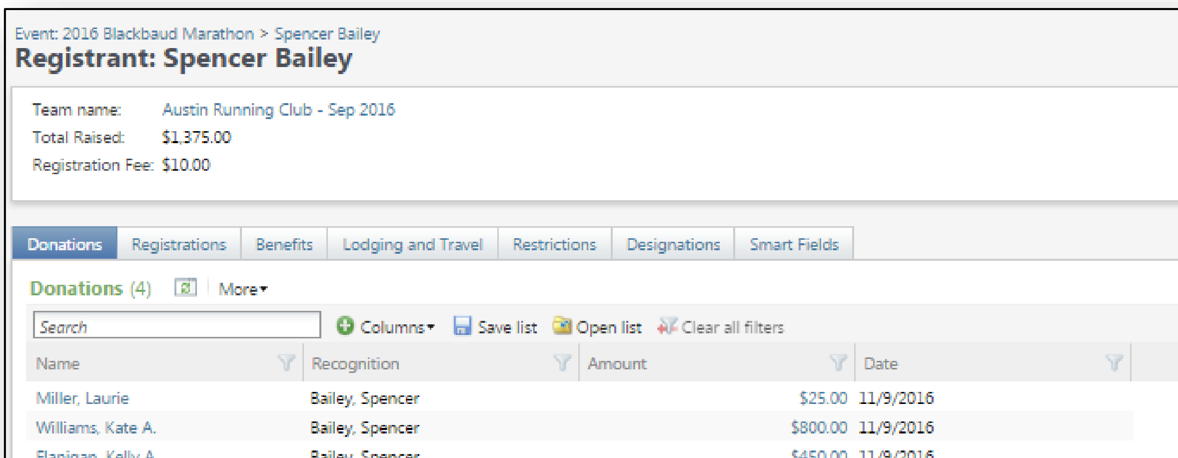


INTERFACE ENHANCEMENTS

A data list has been added to the event record in **BBCRM**, to allow users to quickly see roll-up information related to TeamRaiser Registrants.



An alternate registrant page has also been added for TeamRaiser Registrants, to surface additional team and fundraising information.



SYNC PROCESS CONFIGURATIONS

The TeamRaiser Registrant Sync Process has some configurable options that can be set (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" TeamRaiser Registrant Sync).

GENERAL

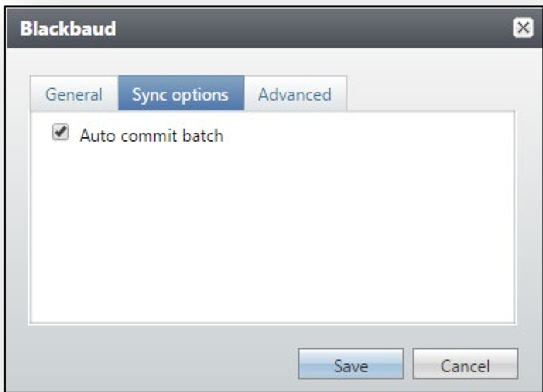
The default options under the *General* tab should not be changed.

SYNC OPTIONS

Under the *Sync Options* tab, there is one configuration option available:

- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed. This only applies to the registrations, not to the payments, as those are controlled by a configuration on the Query Import.

Note — **Blackbaud** recommends that the "auto-commit batch" flag is set, so that the TeamRaiser Registration Payment records can be marked as staging and ready for import.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

The "LO Sync - TeamRaiser Event Registrants" batch template is installed with this sync. It uses the OOB "Event Registrant" batch type with a custom extension.

The following columns are not used by the sync, but are available in the batch template:

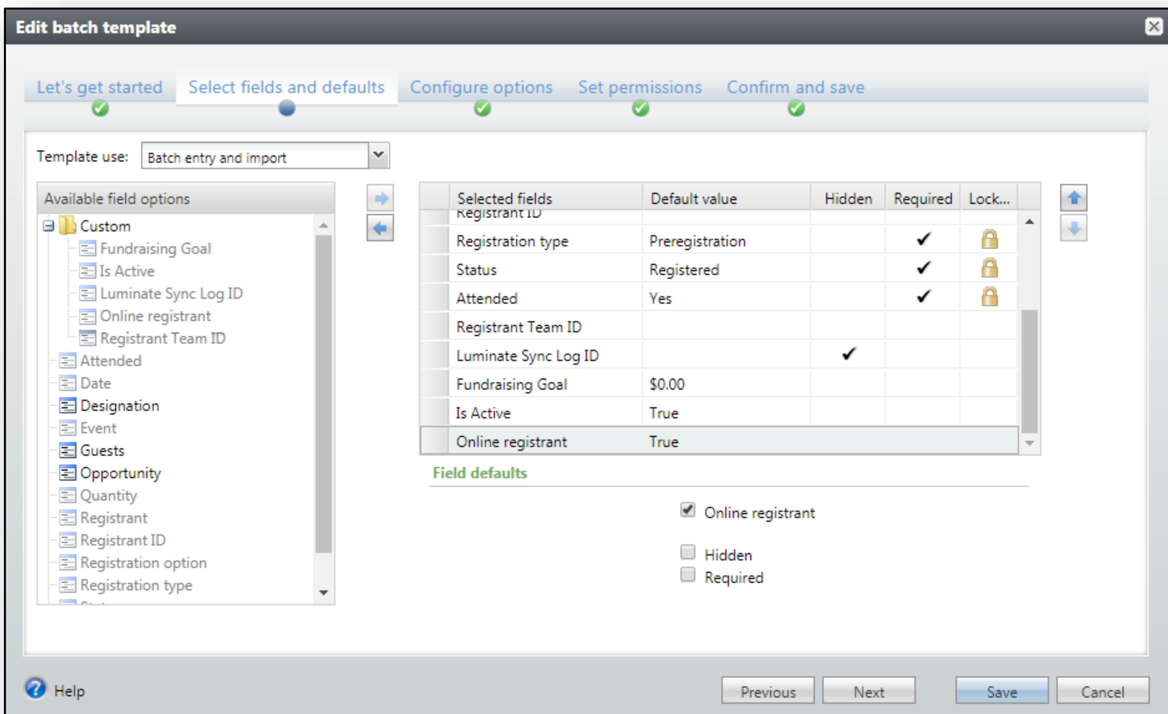
Column Name	Description
Attended	This is defaulted to "Yes," but can be changed if needed with no impact on the sync.
Registration Type	This is defaulted to "Preregistration," but can be changed if needed with no impact on the sync.
Registrant Team ID	This is the ID for the registrant's team. Extension logic in the batch links the registrant to the team record and adds him/her as a member of the constituent group record based on this value.

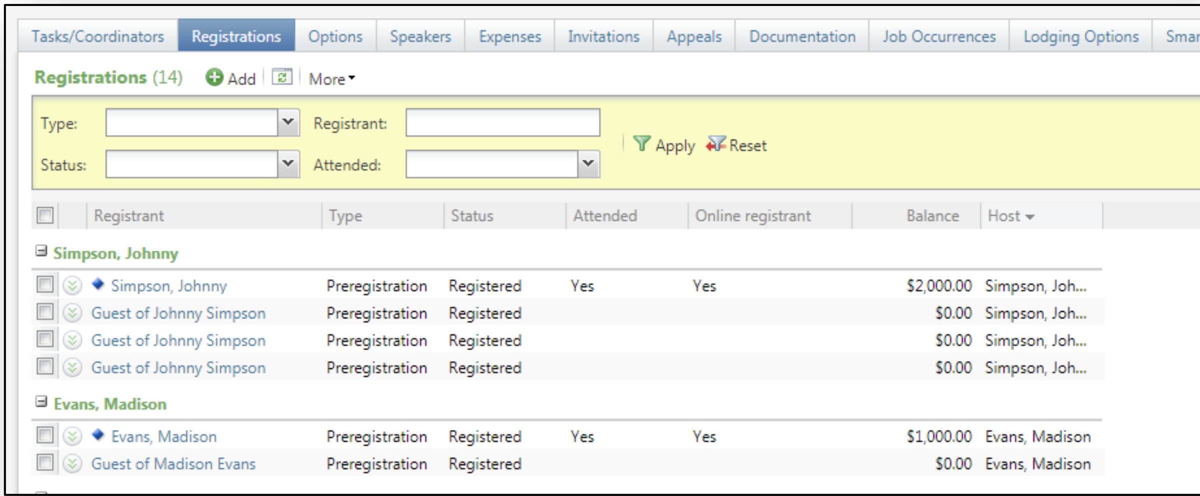
TeamRaiser Team Company Sync

The TeamRaiser Team Company Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM.** As part of the baseline integration, no TeamRaiser view forms, data lists or other user interface elements were updated to include this information. However, the process makes the fields available to leverage with additional customizations, as needed.

In **BBCRM**, there is an OOB first-class field on the Event Registrant record called "Online Registrant." This cannot be updated manually, but is automatically set to TRUE for event registrants that come in from **BBIS**. This flag can also be set to TRUE for all event registrants that come in from **Luminate Online** through the Calendar Event Registrant or TeamRaiser Event Registrant syncs.

In order for this update to work correctly, the "Online registrant" field needs to be added to the "LO Sync – Calendar Event Registrants" and "LO Sync – TeamRaiser Event Registrant" batch templates and defaulted to TRUE.




Tasks/Coordinators
Registrations
Options
Speakers
Expenses
Invitations
Appeals
Documentation
Job Occurrences
Lodging Options
Registrations (14)
Add
More
Type:
Registrant:
Status:
Attended:
Apply
Reset
Registrant
Type
Status
Attended
Online registrant
Balance
Host
Simpson, Johnny
Simpson, Johnny Preregistration Registered Yes Yes $2,000.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Evans, Madison
Evans, Madison Preregistration Registered Yes Yes $1,000.00 Evans, Madison
Guest of Madison Evans Preregistration Registered $0.00 Evans, Madison

CALENDAR EVENTS

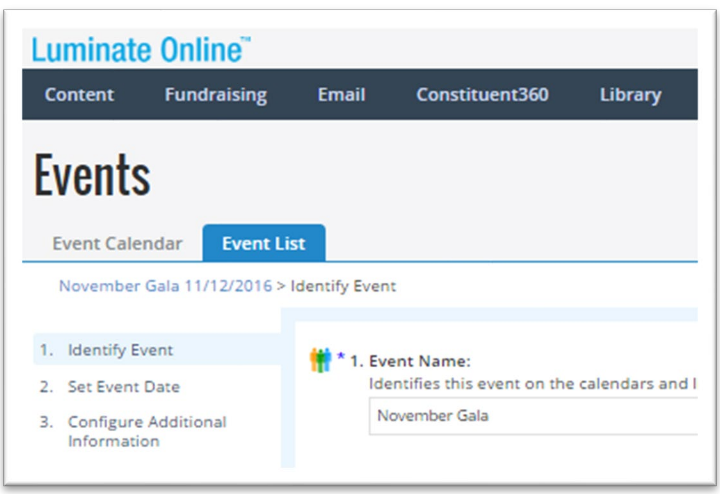
Calendar Events from **Luminate Online** are brought into **Blackbaud CRM** through four separate sync processes:

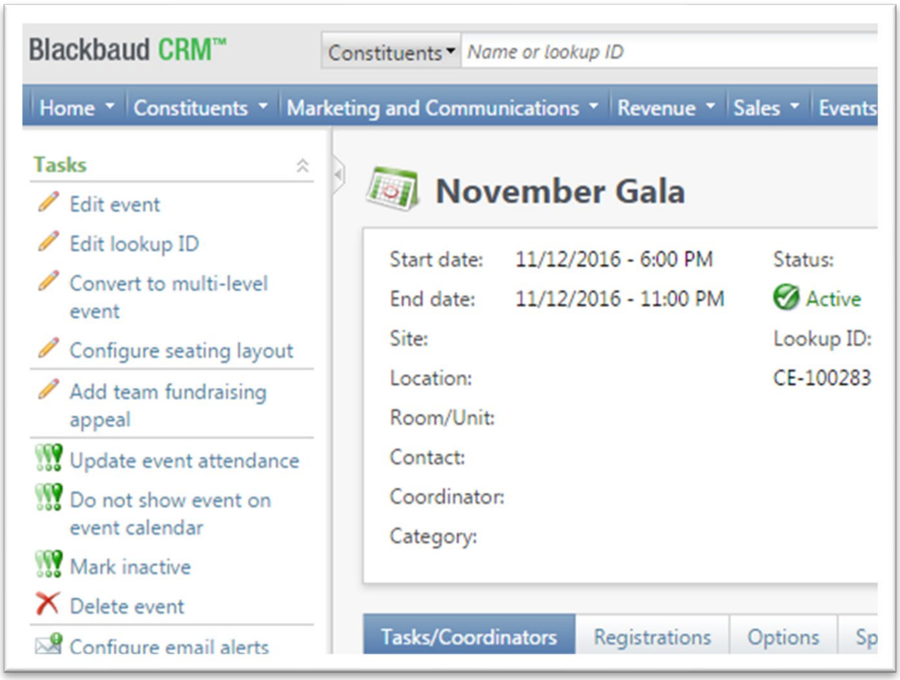
- Calendar Event Sync
- Calendar Event Ticket Type Sync
- Calendar Event Registrant Sync
- Calendar Event Category Sync

For information on ticket purchases, refer to the *Calendar Event Ticket Purchases* section.

Calendar Event Sync

The Calendar Event Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated calendar events from **Luminate Online** into the events module of **BBCRM**. Events will sync over with a status of either "Draft" or "Published." The calendar event's lookup ID will be set to 'CE-' + the LO event ID and should not be edited in **BBCRM**.





SYNC PROCESS CONFIGURATIONS

The Calendar Event Sync Process has some configurable options that can be set as needed(available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Calendar Event Sync).

GENERAL

The default options under the *General* tab should not be changed.

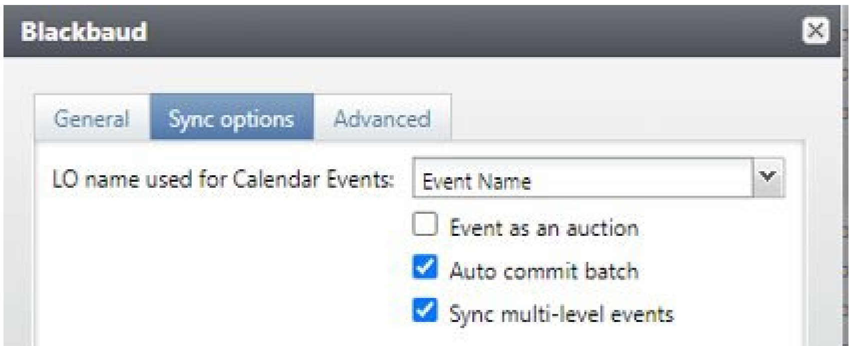
SYNC OPTIONS

Under the *Sync Options* tab, the configuration options available are:

- **LO name used for Calendar Events**: can choose to use either the LO 'Event Name' or LO 'Event Tag' to sync to the BBCRM Calendar Event name
- **Event as Auction**: if marked, all calendar events processed by the sync will have the "Event is an auction" checkbox checked when they are created.
- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed.
- **Sync multi-level events**: If checked, the sync allows multi-part events in **LO** to create or add to an existing multi-level event hierarchy.
  - The parent event is created as an event. When a sub event syncs over, a multi-level event hierarchy for the parent and sub event will be created.
  - Subsequent sub events that sync will be added to the existing hierarchy.

- If a sub event syncs over before the parent event, it will be created an event outside the hierarchy. When the parent eventually syncs over, the parent and all children will be added to a multi-level event hierarchy.
- Refer to the *Global Settings* section for where to define the Event Management Template used for creating multi-level events.

Note — **Blackbaud** strongly recommends that the "auto-commit batch" flag is set, so that records in subsequent syncs (i.e. Calendar Event Ticket Types, Calendar Event Registrants) successfully process.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

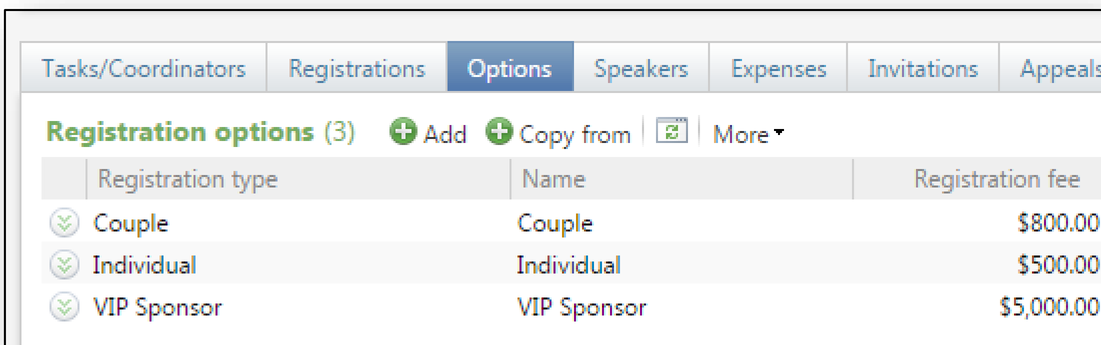
The "LO Sync - Calendar Events" batch template is installed with the sync. It uses the "Event Batch (Custom)" batch type.

The following columns are not used by the sync, but are available in the batch template:

Column Name	Description
Is Auction	This is redundant to the "Event as auction" checkbox on the actual sync process.
Create Team Appeal	This field is included in the batch template for TeamRaiser batches. It should be left unchecked for Calendar Events.
Allow Designations on Fees	This can be defaulted based on user preference with no impact on the sync.
Site	This can be defaulted based on user preference with no impact on the sync.

Calendar Event Ticket Type Sync

The Calendar Event Ticket Type Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated ticket types from **Luminate Online** as registration options of **BBCRM**. The name of the ticket type in **LO** will be brought over as both the registration type and the registration option name in **BBCRM**.



Note — For RSVP events, a single registration option is created with "RSVP" as the registration type and the registration option name. This is created during the Calendar Event Sync, not this Calendar Event Ticket Types sync.

SYNC PROCESS CONFIGURATIONS

The Calendar Event Ticket Type Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Calendar Event Ticket Type Sync).

GENERAL

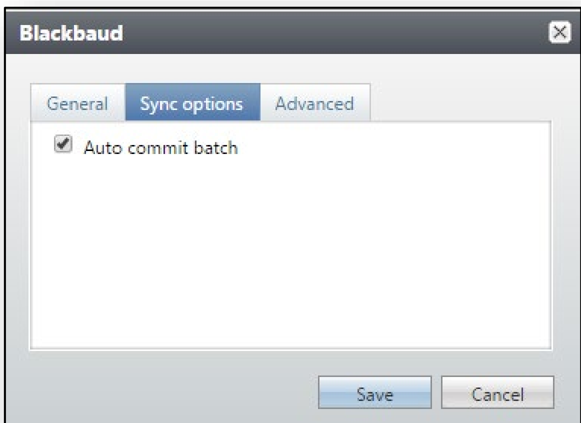
The default options under the *General* tab should not be changed.

SYNC OPTIONS

Under the *Sync Options* tab, there is one configuration option available:

- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed.

Note — **Blackbaud** strongly recommends that the "auto-commit batch" flag is set, so that records in subsequent syncs (i.e. Calendar Event Registrants) successfully process.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

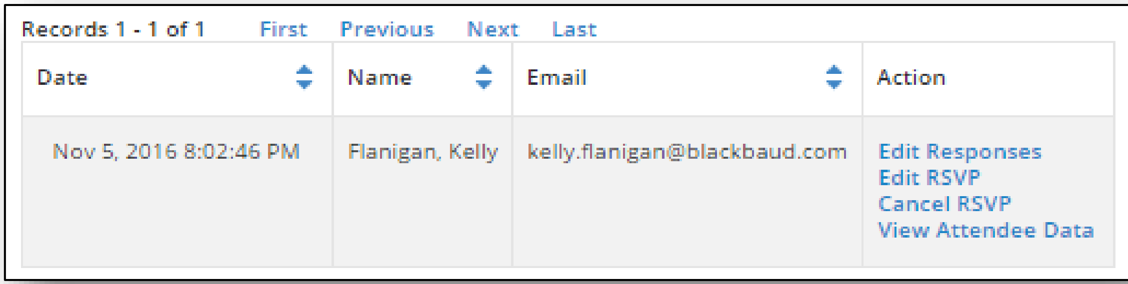
The "LO Sync - Event Options" batch template is installed with this sync. It uses the "Event Option Batch (Custom)" batch type.

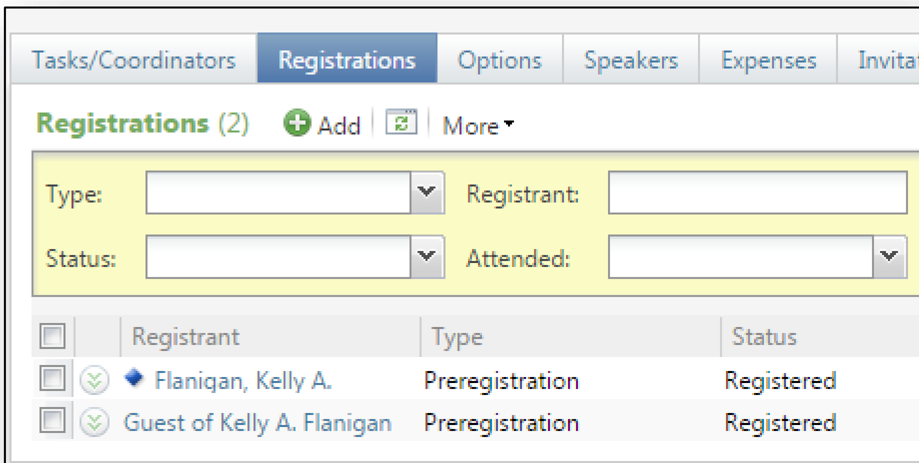
The following columns are not used by the sync, but are available in the batch template:

Column Name	Description
Registration Count	This is defaulted to 1, but can be changed with no impact on the sync.

Calendar Event Registrant Sync

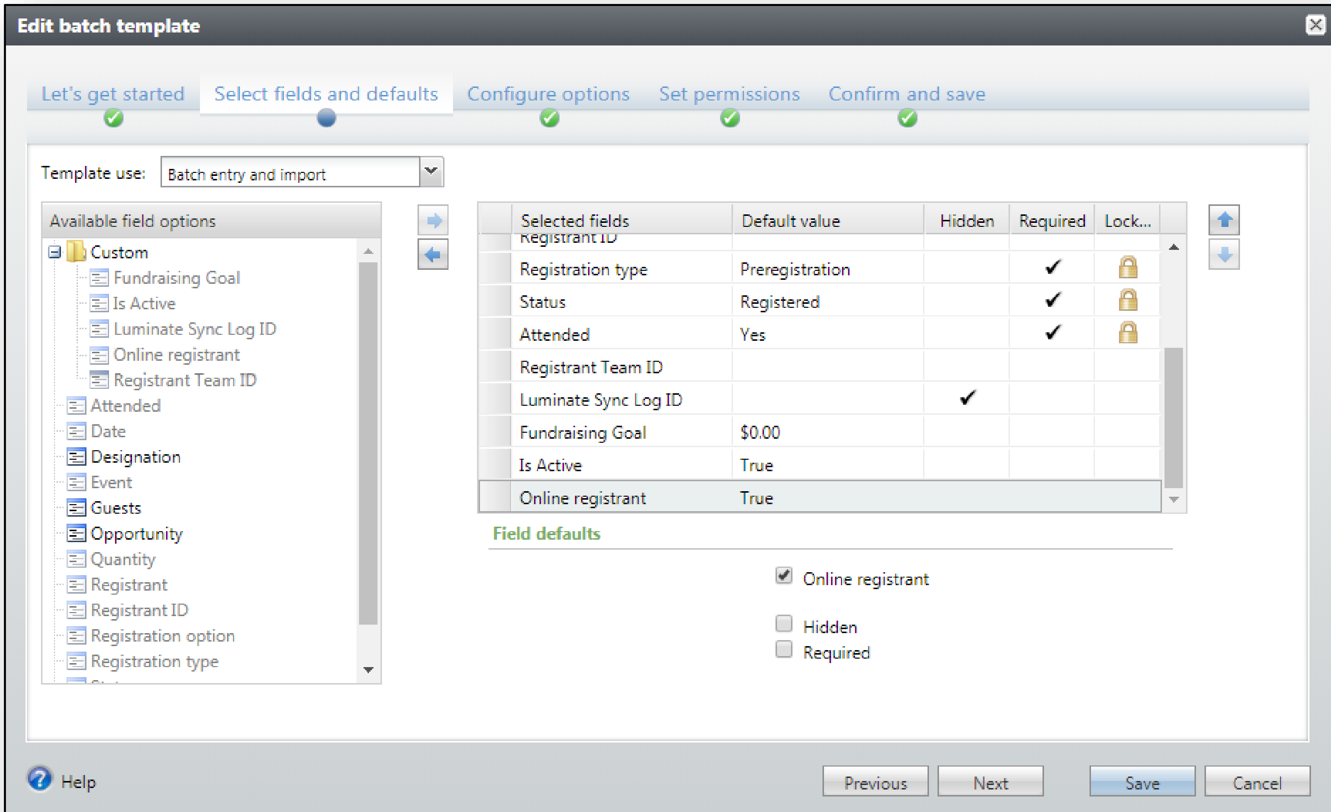
The Calendar Event Registrant Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new calendar event ticket purchases or RSVP respondents from **Luminate Online** into the event registrants in **BBCRM** (as well as, Calendar Event Ticket Purchases in the child sync as described in the Revenue section above). Additional RSVPs or tickets purchased by the constituent are brought over as "Unknown Guests" of the registrant. Registrations for parent and sub events will be transferred.

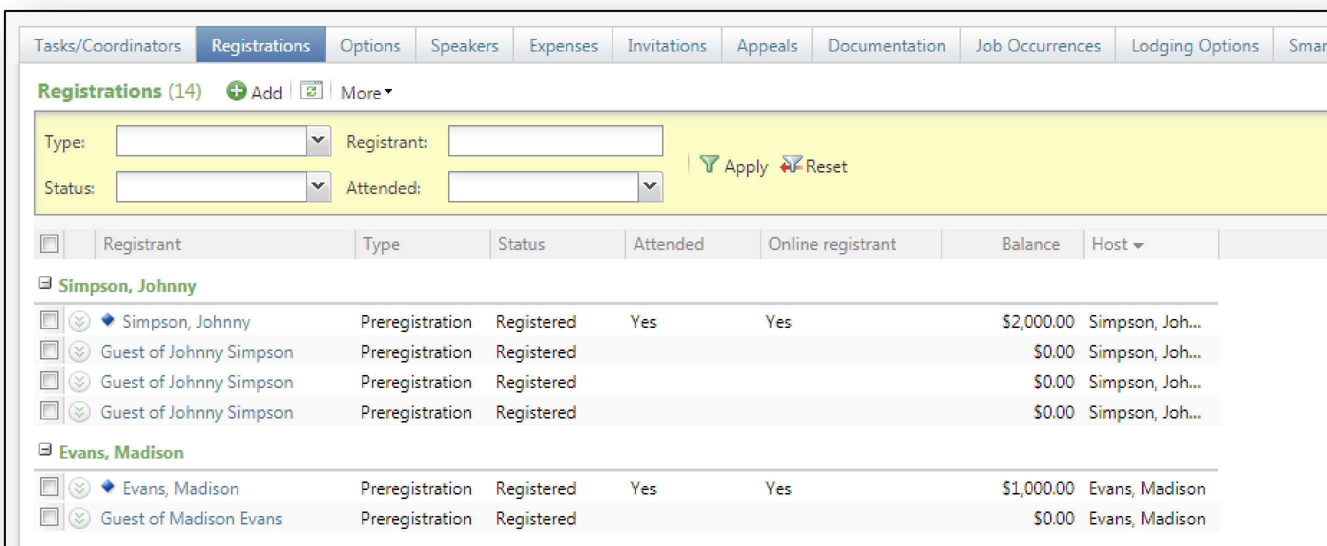




In **BBCRM**, there is an OOB first-class field on the Event Registrant record called “Online Registrant.” This cannot be updated manually, but is automatically set to TRUE for event registrants that come in from BBIS. This flag can also be set to TRUE for all event registrants that come in from **Luminate Online** through the Calendar Event Registrant or TeamRaiser Event Registrant syncs.

In order for this update to work correctly, the “Online registrant” field needs to be added to the “LO Sync – Calendar Event Registrants” and “LO Sync – TeamRaiser Event Registrant” batch templates and defaulted to TRUE.


Edit batch template
Let's get started
Select fields and defaults
Configure options
Set permissions
Confirm and save
Template use:
Batch entry and import
Available field options
Custom
Fundraising Goal
Is Active
Luminate Sync Log ID
Online registrant
Registrant Team ID
Attended
Date
Designation
Event
Guests
Opportunity
Quantity
Registrant
Registrant ID
Registration option
Registration type
Selected fields
Default value
Hidden
Required
Lock...
Registration type
Preregistration
Status
Registered
Attended
Yes
Registrant Team ID
Luminate Sync Log ID
Fundraising Goal
$0.00
Is Active
True
Online registrant
True
Field defaults
Online registrant
Hidden
Required
Help
Previous
Next
Save
Cancel


Tasks/Coordinators
Registrations
Options
Speakers
Expenses
Invitations
Appeals
Documentation
Job Occurrences
Lodging Options
Registrations (14)
Add
More
Type:
Registrant:
Status:
Attended:
Apply
Reset
Registrant
Type
Status
Attended
Online registrant
Balance
Host
Simpson, Johnny
Simpson, Johnny Preregistration Registered Yes Yes $2,000.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Guest of Johnny Simpson Preregistration Registered $0.00 Simpson, Joh...
Evans, Madison
Evans, Madison Preregistration Registered Yes Yes $1,000.00 Evans, Madison
Guest of Madison Evans Preregistration Registered $0.00 Evans, Madison

SYNC PROCESS CONFIGURATIONS

The Calendar Event Registrant Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Calendar Event Registrant Sync).

GENERAL

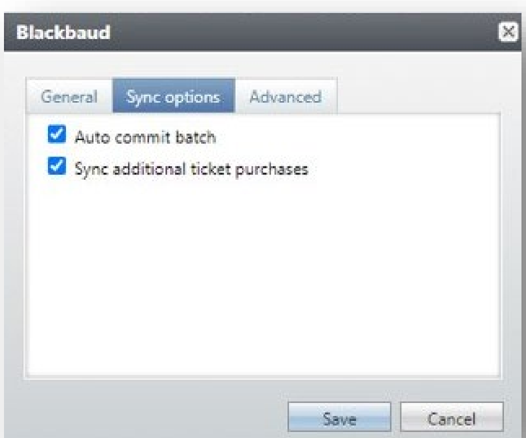
The default options under the *General* tab should not be changed.

SYNC OPTIONS

Under the *Sync Options* tab, the following configuration options are available:

- **Auto Commit Batch**: If checked, all successful rows will be auto committed when they are processed. This only applies to the registrations, not to the ticket purchases, as those are controlled by a configuration on the Query Import.
- **Sync additional ticket purchases**: Additional ticket purchases, regardless of ticket type, are added to the existing registration for that constituent as unnamed guests. This checkbox is defaulted to "false" (unchecked). If the checkbox is not enabled, the other ticket purchases will trigger a batch exception as the constituent already has a registration.

Note — **Blackbaud** recommends that the "auto-commit batch" flag is set, so that the Calendar Event Ticket Purchase records can be marked as staged and ready for import.



ADVANCED

The default options under the *Advanced* tab should not be changed.

BATCH TEMPLATE

The "LO Sync - Calendar Event Registrants" batch template is installed with this sync. It uses the OOB "Event Registrant" batch type with a custom extension.

The following columns are not used by the sync, but are available in the batch template:

Column Name	Description
Attended	This is defaulted to "Yes," but can be changed with no impact on the sync.
Registration Type	This is defaulted to "Preregistration," but can be changed with no impact on the sync.

Calendar Event Category Sync

The Calendar Event Category Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over the Event Category from Calendar Events in **LO**. If the value used in **LO** does not exist as a value in **BBCRM**, the sync adds the value to the **BBCRM** code table. This sync process is optional so users can choose to not run this sync process if desired.

SYNC PROCESS CONFIGURATIONS

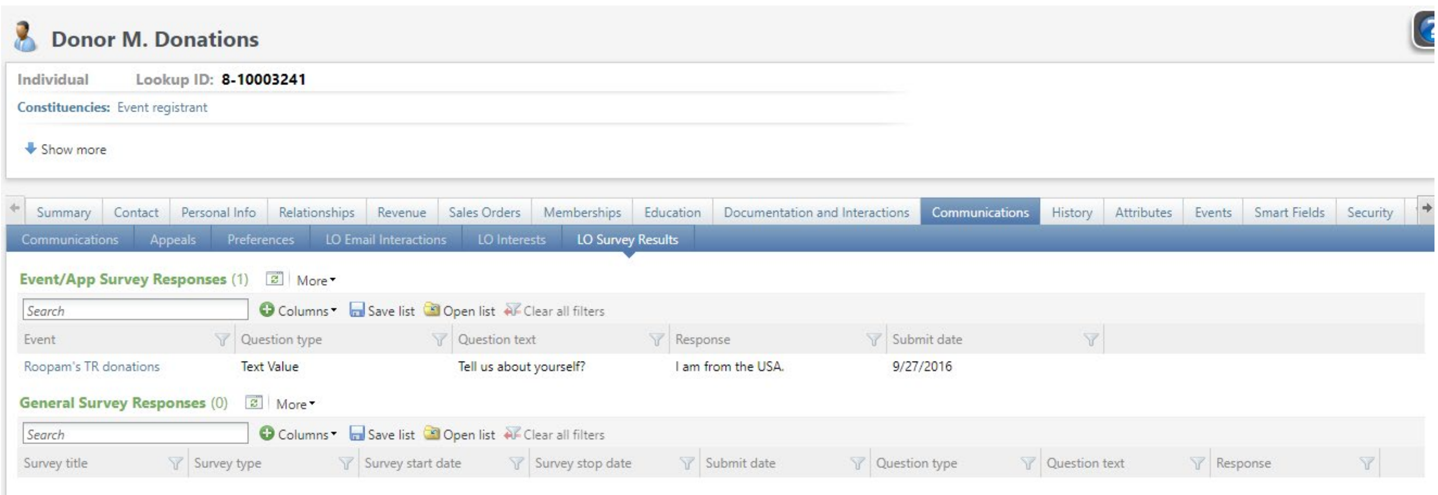
The configuration options for the Calendar Event Category Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Calendar Event Category Sync).

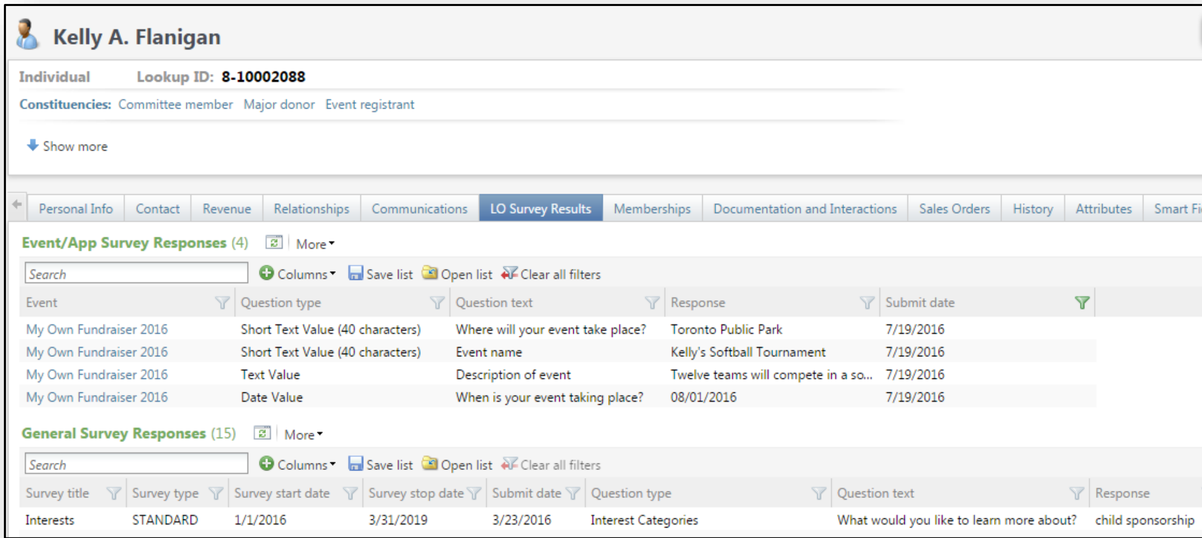
SURVEYS

The Survey Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over new and updated Surveys, Survey Questions and Survey Responses from **Luminate Online** directly into new custom tables in **BBCRM**. If past survey responses need to be synced, the seed date for the sync process will need to be updated.

Survey responses include two record types from the **Luminate Online API**: SurveyResponse and ApplicationSurveyResponses. General surveys responses refers to survey responses submitted by constituents through the Surveys module. Application survey responses refer to survey responses submitted by constituents as part of a TeamRaiser or Calendar event registration.

Survey Sync results can be found on the constituent record on the *LO Survey Results* tab under the *Communications* tab. In order to see the results in **BBCRM**, "Finish" must be clicked after creating or editing questions in the Event's Participation Type's Additional Questions section in **LO**. That action generates the "Modify Date" field that is used in the Survey Sync process.





Additional data lists can be configured to surface this information elsewhere in the system. For example, many organizations choose to create a data list displaying the responses to questions asked during registration on the TeamRaiser registrant's record.

Note — The full text for unlimited text responses is **not** brought into **BBCRM**, as this information is not available in the **LO API**. The FTP path is brought into the "Response" field, but this is not displayed on the OOB data lists on the constituent record. Additionally, no information is brought over for survey caption, constituent registration info, and CAPTCHA question types.

SYNC PROCESS CONFIGURATIONS

The configuration options for the Survey Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Survey Sync).

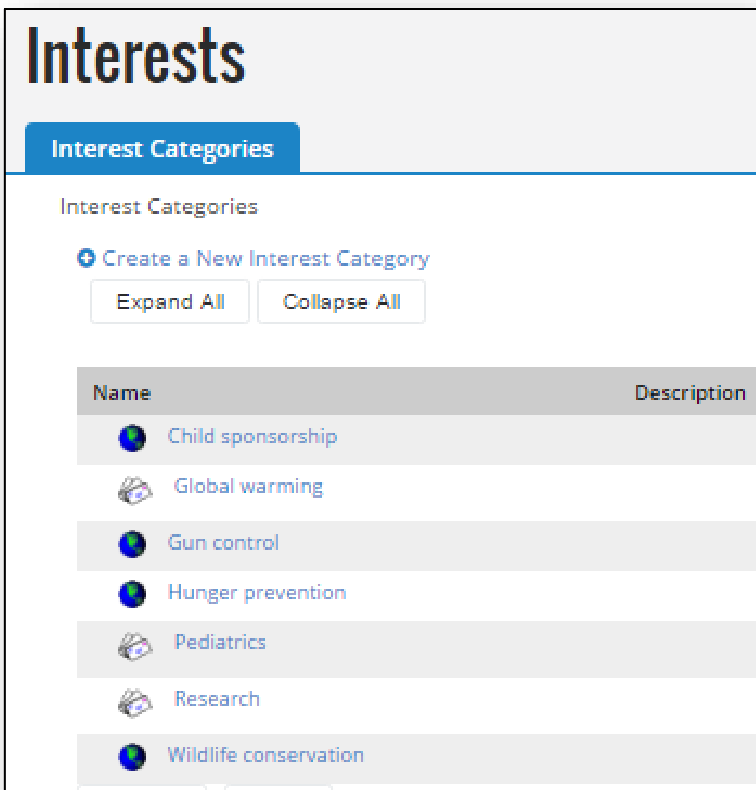
INTERESTS

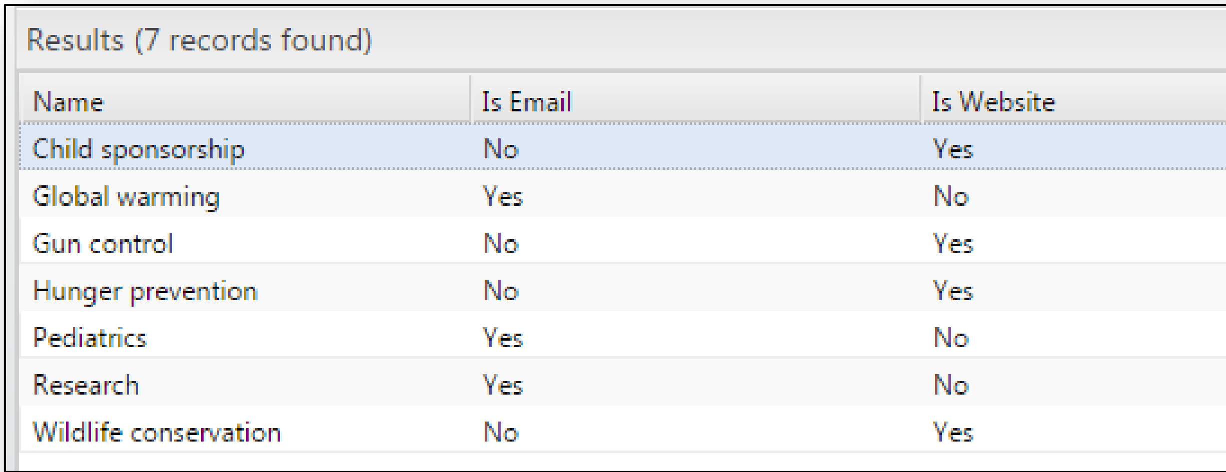
Interests in **Luminate Online** are brought into **Blackbaud CRM** through the following sync processes:

- Interest Categories
- Interest Events
- Constituent Interest

Interest Categories Sync

The Interests Categories Sync is a one-way sync from **Luminate Online** to the **Blackbaud Data Warehouse (BBDW)**. It brings over information on email and web interest categories (commonly referred to as "opt-ins" and "opt-outs" from **Luminate Online** into a new table in the **BBDW**, which can be surfaced through the "Luminate Online Interest Categories" query view.





Results (7 records found)

Name	Is Email	Is Website
Child sponsorship	No	Yes
Global warming	Yes	No
Gun control	No	Yes
Hunger prevention	No	Yes
Pediatrics	Yes	No
Research	Yes	No
Wildlife conservation	No	Yes

SYNC PROCESS CONFIGURATIONS

The Interests Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Interests Sync).

GENERAL

The default options under the *General* tab should not be changed.

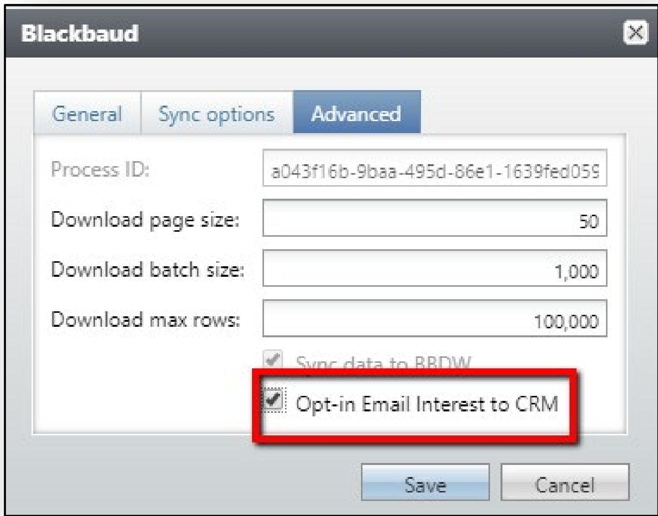
SYNC OPTIONS

There are no configuration options under the *Sync Options* tab for this sync process.

ADVANCED

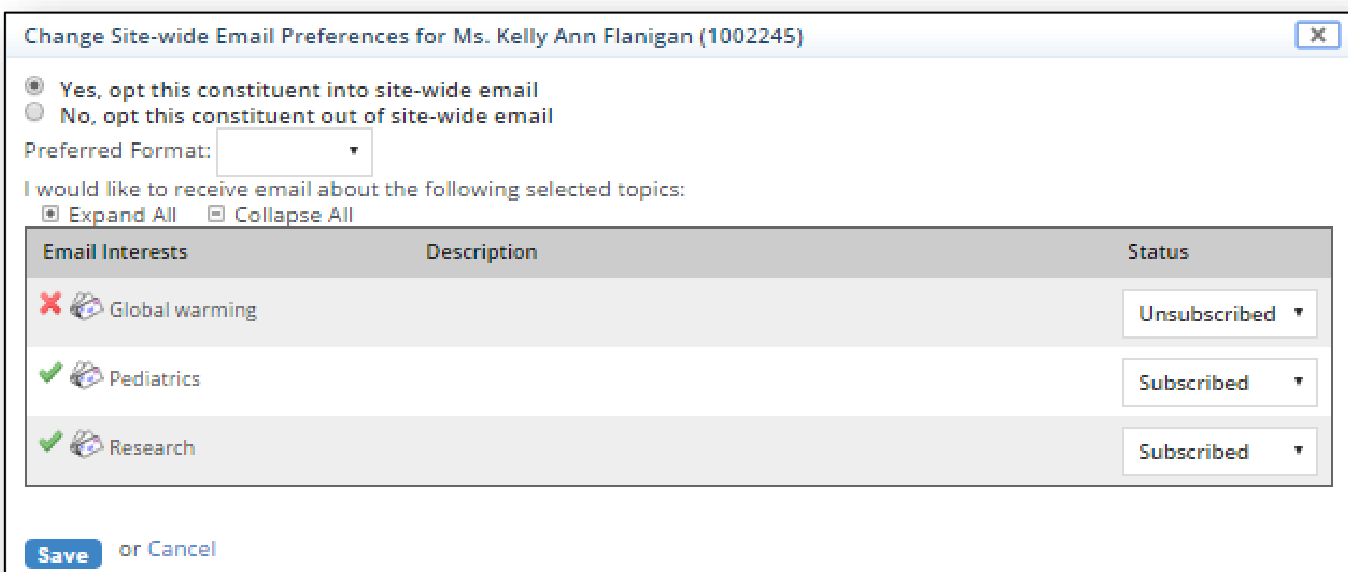
A configuration option is available on the Interest Categories Sync to provide users the option to sync this data directly into **BBCRM**, in addition to the **BBDW**.. When selected, email opt-outs will sync to solicit codes in **BBCRM** and email opt-ins will sync to Constituent Interests.

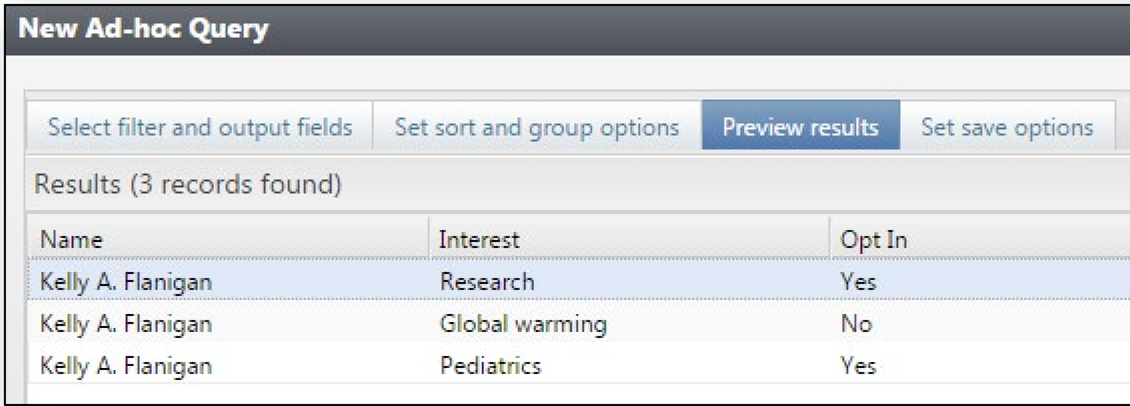
> ***Note —*** As of version 4.0.35 it is recommended to leave this checkbox unmarked as this data will now be available through the Constituent Interest Sync.



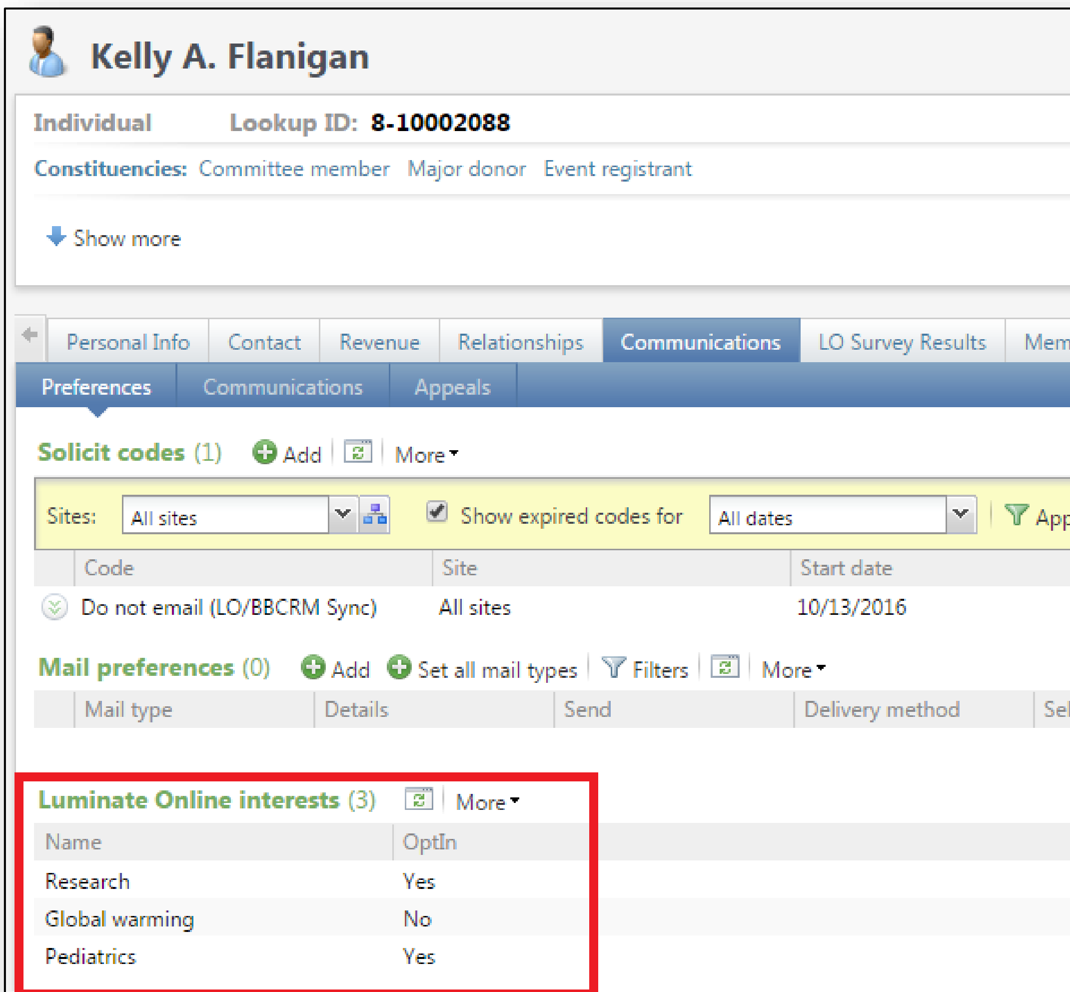
Interest Events Sync

The Interest Events Sync is a one-way sync from **Luminate Online** to the **Blackbaud Data Warehouse**. It brings over information on email interests specified by constituents (commonly referred to as "opt-ins" and "opt-outs") from **Luminate Online** into a new table in the **BBDW**, which can be surfaced through the "Luminate Online Constituent Interests" or "Constituents (from the Blackbaud Data Warehouse)" query views.





This information is not automatically surfaced on a Constituent record in **BBCRM** but data lists can be configured to display the information if needed.



Note — The following five steps need to run in sequential order in order for the Interest Events Sync to work:

1. Constituent Sync
2. *ConsID Attribute Global Change*
3. Refresh BBDW
4. Interests Sync
5. Interests Events Sync

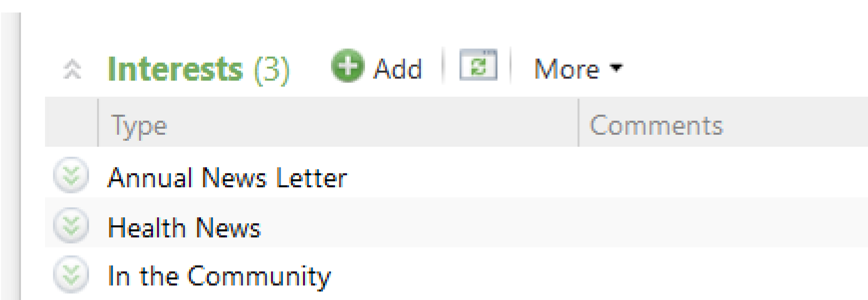
SYNC PROCESS CONFIGURATIONS

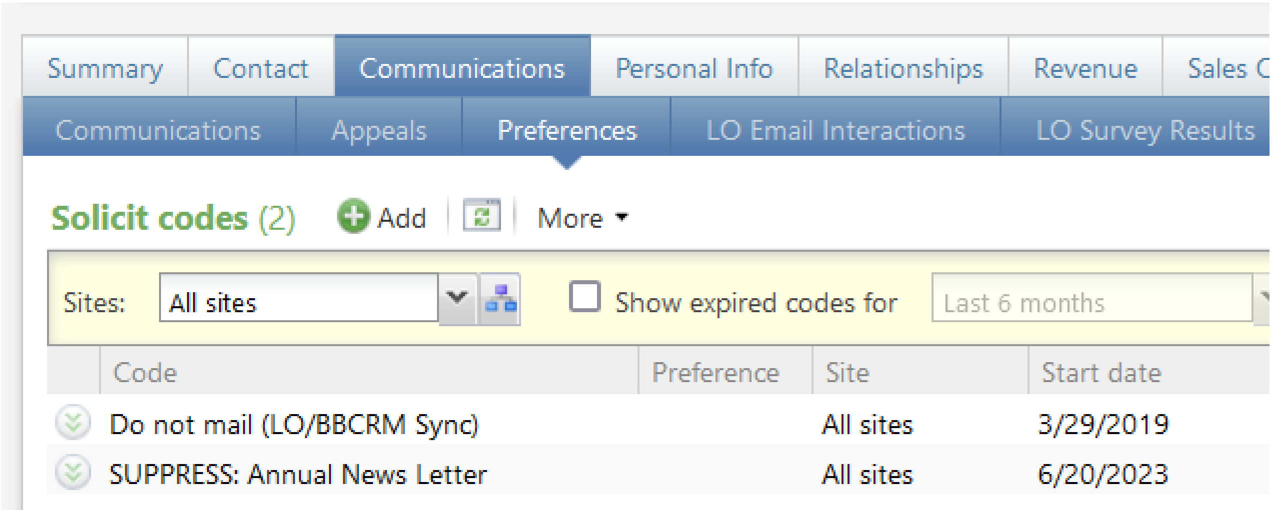
The configuration options for the Interest Events Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Interest Events Sync).

Constituent Interest Sync

The Constituent Interest Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over information on email interests (commonly referred to as "opt-ins" and "opt-outs") from **Luminate Online** and adds them to constituents in **BBCRM** as Interests and Solicit codes. The Constituent Interest Sync adds data directly to the constituent records and does not use batch.

In **LO**, constituents that opt-in to an Interest Group will have the data added as an Interest on their constituent record in **BBCRM**. Constituents that have opted-out of an Interest Group in **LO** will have the Interest removed from the **BBCRM** record and a SUPPRESS Solicit code added to the constituent record in **BBCRM**. If the constituent opts back into the Interest Group in **LO** after opting-out, the SUPRESS Solicit code will be ended dated on the **BBCRM** record and the Interest will be added back to the **BBCRM** record.





The Constituent Interest Sync also includes the Interest Code Sync. The Interest Code Sync adds new interest codes to **BBCRM** if they do not exist and adds new solicit codes to **BBCRM** if they do not exist.

Note — This sync process was developed as an alternative to the Opt-in Email Interests to BBCRM option of the Interest Categories Sync; however, that option is still available as part of the baseline integration. It is recommended to unmark the 'Opt-in Email Interest to Blackbaud CRM' option on the Interests sync as that data will now be available through this sync.

SYNC PROCESS CONFIGURATIONS

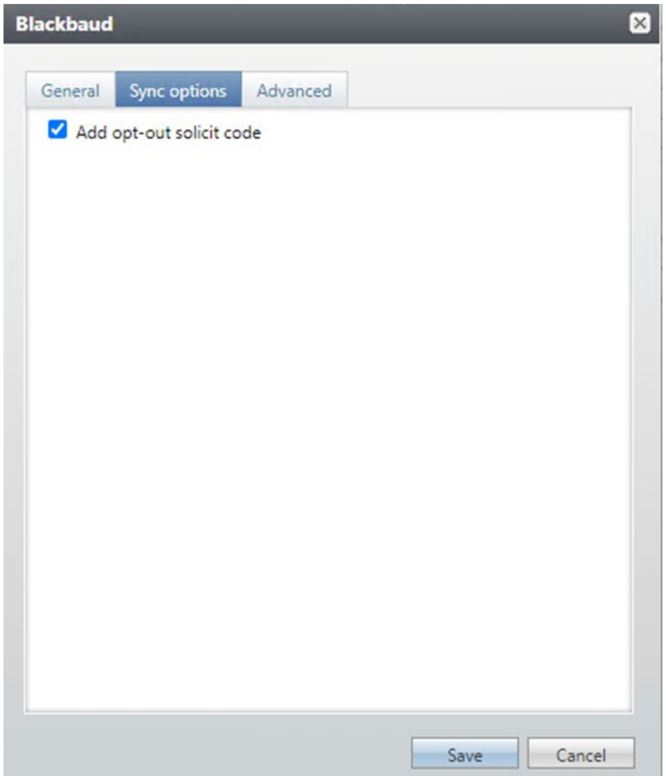
The Constituent Interest Sync Process has some configurable options that can be set as needed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Constituent Interest Sync).

GENERAL

The default options under the *General* tab should not be changed.

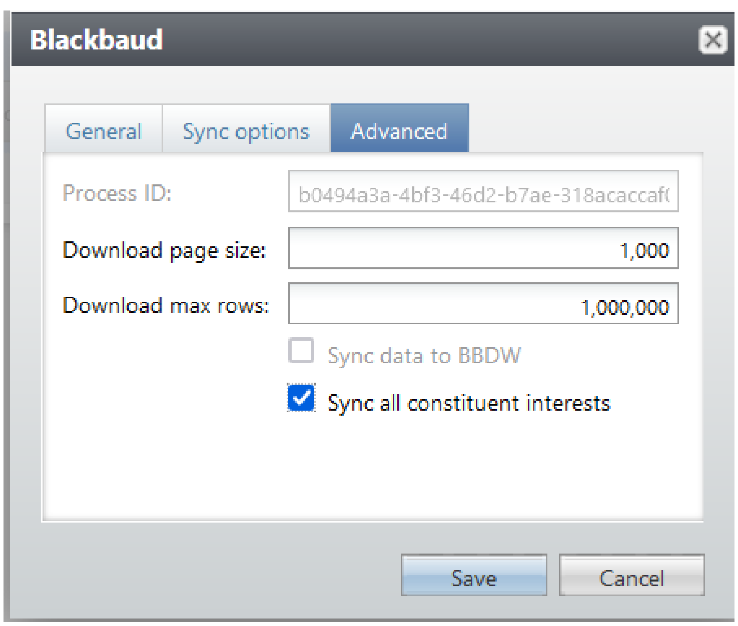
SYNC OPTIONS

As of version 4.0.38, an option is available to make the adding of Solict codes optional. By default the configuration is set to true. If unmarked, when a Constituent opts-out of an Interest Group in **LO** the corresponding SUPPRESS Solicit code will not be added.



ADVANCED

The ability to choose to sync all constituent interests into **BBCRM** is available. By default, the sync will only check constituents updated since the last time it was run, or when a new default email interest is added in **LO** it will force all constituents to sync. The Sync all constituent interests option forces it to always sync all constituent interests. This is useful for organizations who import interests into **LO**, which does not update the modify date on constituent records.



EMAILS

Email Data in **Luminate Online** is brought into **Blackbaud CRM** through four separate sync processes:

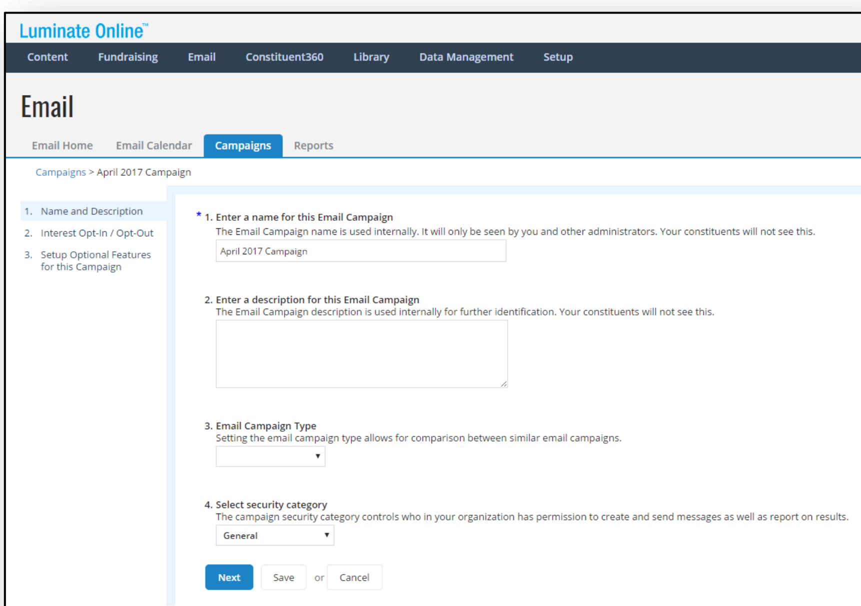
- Email Campaign
- Email Message
- Email Delivery
- Email Recipient

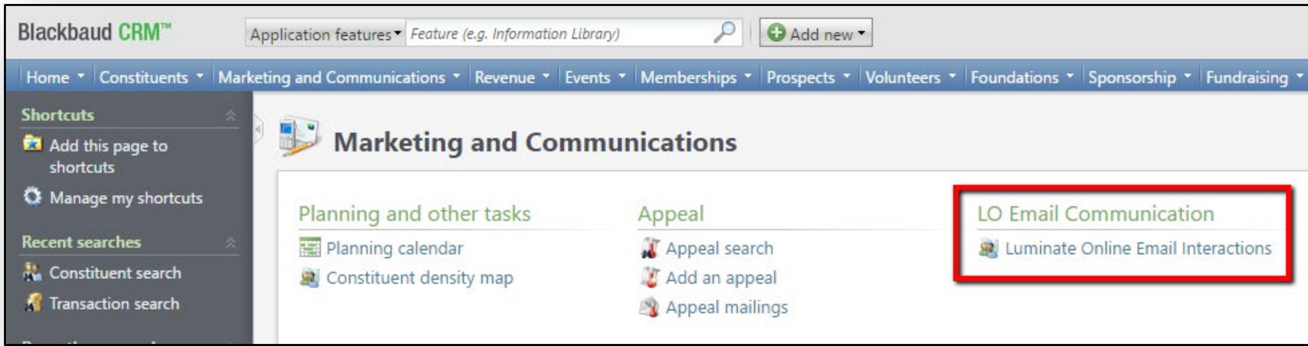
Note — These sync processes were developed as an alternative to the BBDW Luminate Online Email Interactions Sync developed by **Blackbaud Products**. However, both options are still available as part of the baseline integration, so users may see two email-related data lists under the *Communications* tab of the Constituent record. It is recommended to hide one of the data lists, depending on which functionality is used.

Note — LO Test (**LOT**) environments do not have access to send email messages. Therefore, testing within an **LOT** environment can only supply Email Campaign and Email Message data. Email Delivery and Recipient data cannot be generated within **LOT** environments and therefore will not be synced to the **BBCRM** testing environment. However, if there is older email data in the **LOT** that came over when the LO PROD site was copied, then this data can be synced into **BBCRM**.

Email Campaign Sync

The Email Campaign Sync is a one-way sync processes from **Luminate Online** to **Blackbaud CRM**. It brings over information on email campaigns from **Luminate Online** into a new table in **BBCRM**, which is surfaced under the Marketing and Communications functional area.



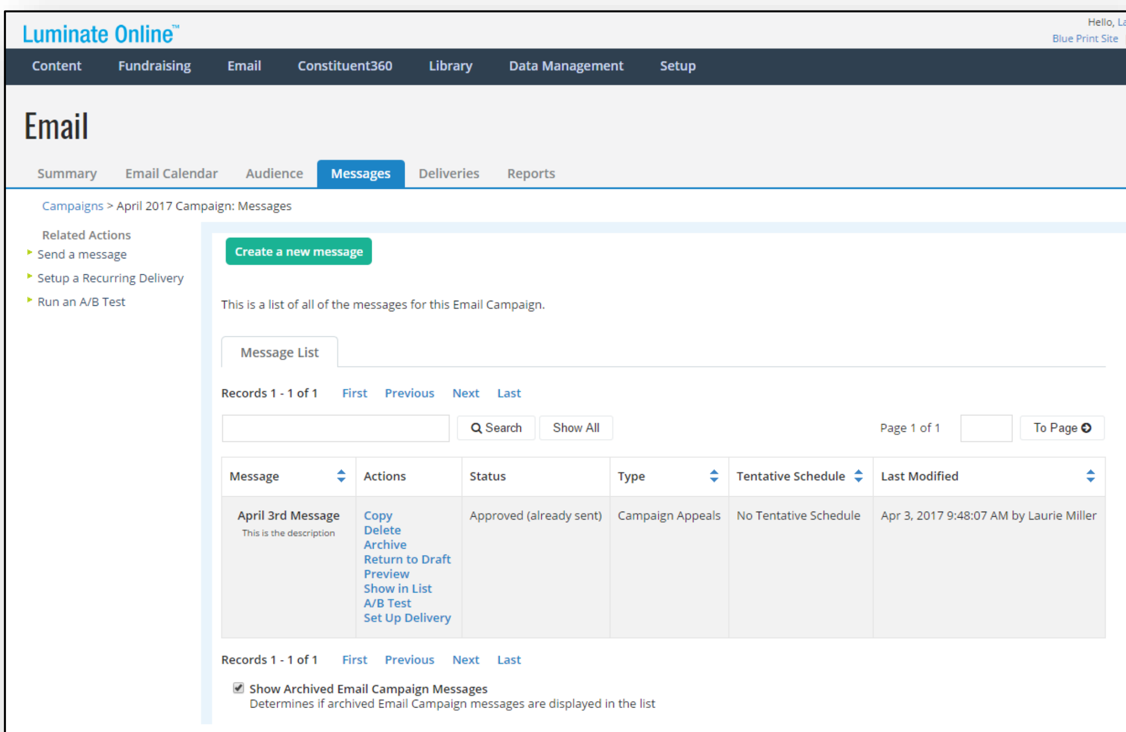


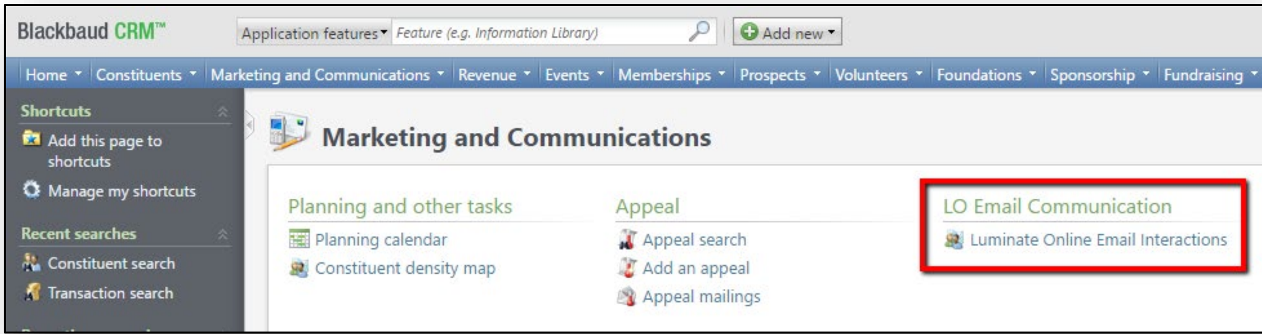
SYNC PROCESS CONFIGURATIONS

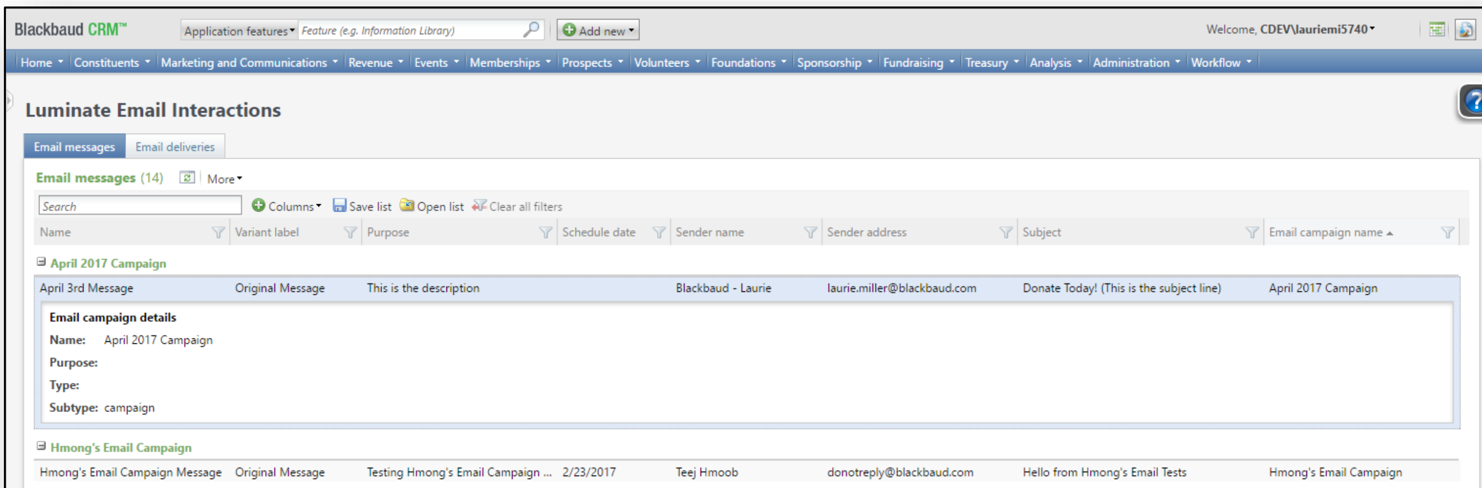
The configuration options for the Email Campaign Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Email Campaign Sync).

Email Message Sync

The Email Message Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over information on email message from **Luminate Online** into a new table in **CRM,** which is surfaced under the Marketing and Communications functional area.





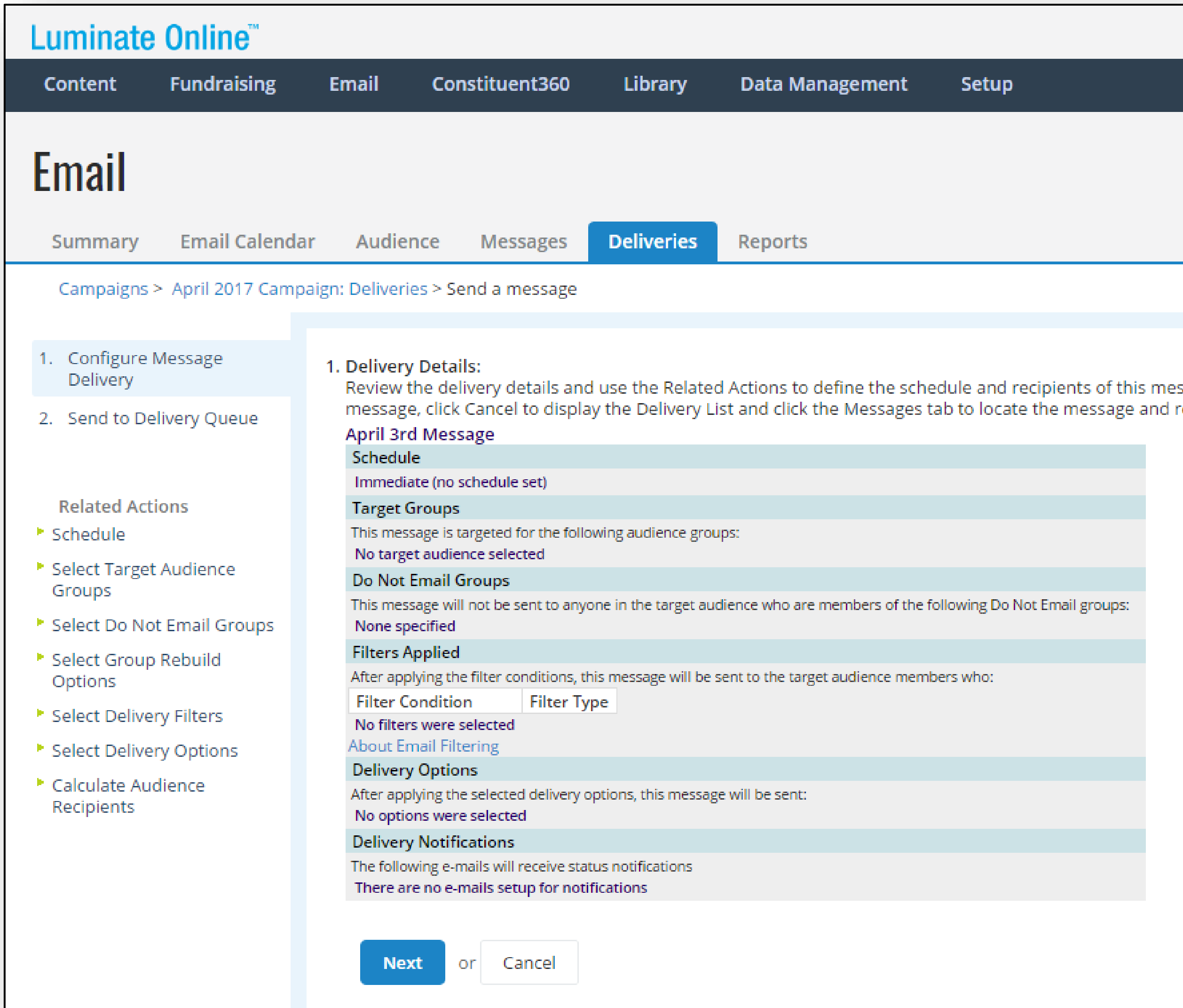


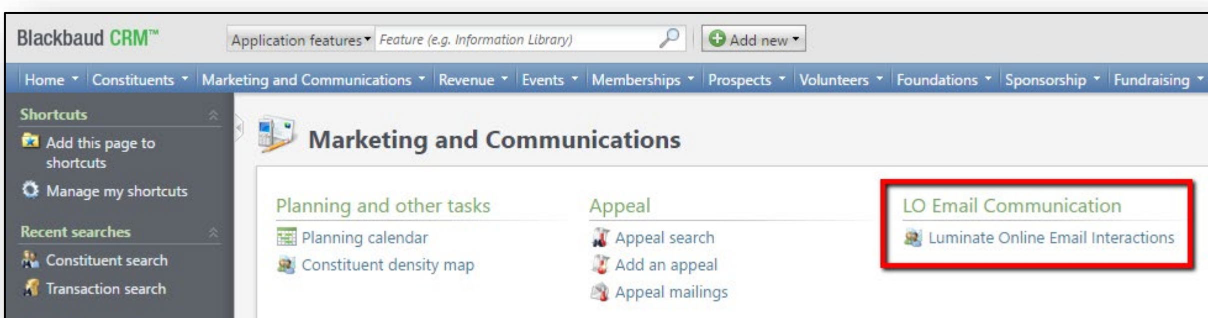
SYNC PROCESS CONFIGURATIONS

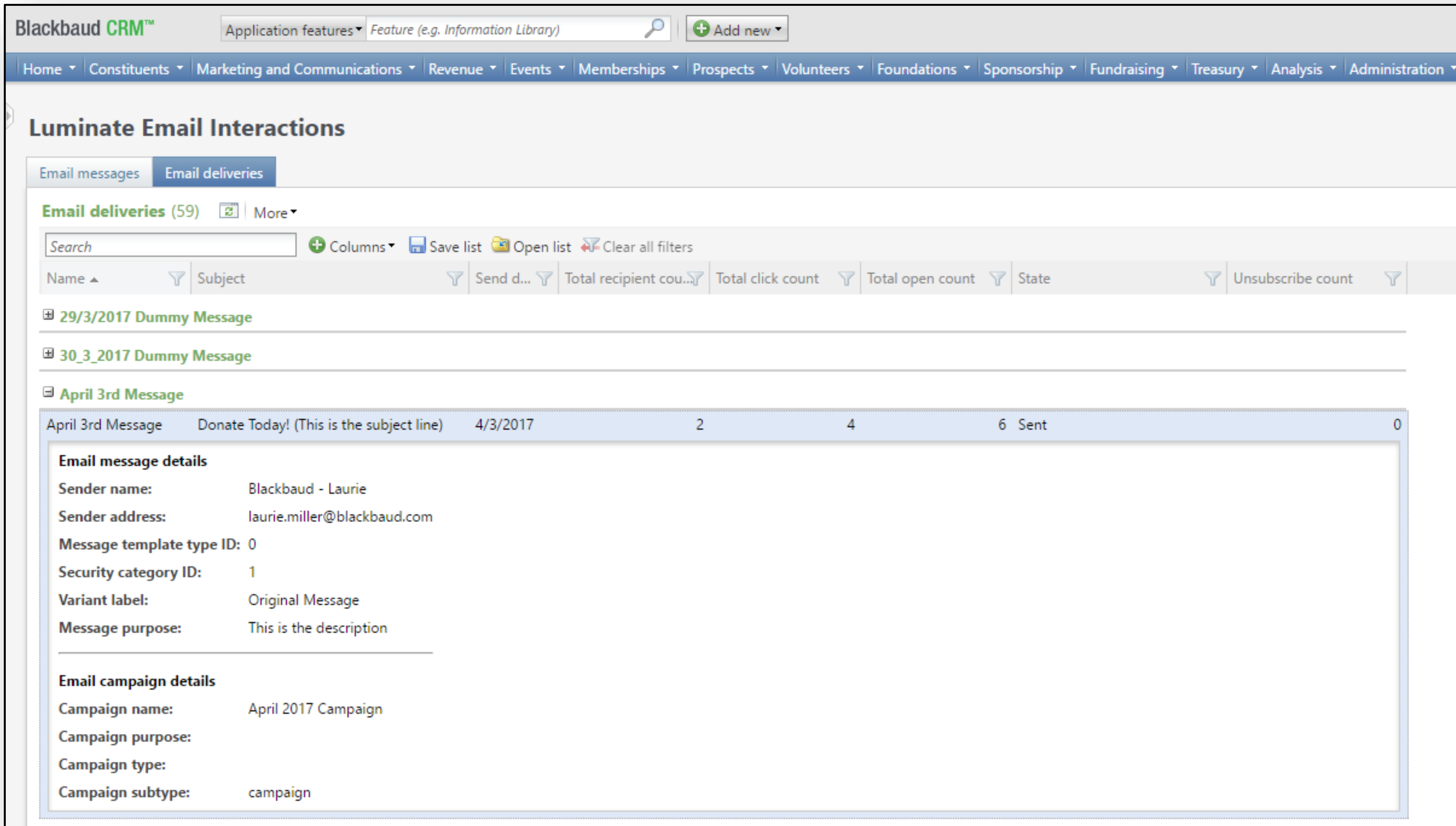
The configuration options for the Email Message Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Email Campaign Message Sync).

Email Delivery Sync

The Email Delivery Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over information on email delivery from **Luminate Online** into a new table in **CRM,** which is surfaced under the Marketing and Communications functional area.


Luminate Online™
Content
Fundraising
Email
Constituent360
Library
Data Management
Setup
Email
Summary
Email Calendar
Audience
Messages
Deliveries
Reports
Campaigns > April 2017 Campaign: Deliveries > Send a message
1. Configure Message Delivery
2. Send to Delivery Queue
Related Actions
Schedule
Select Target Audience Groups
Select Do Not Email Groups
Select Group Rebuild Options
Select Delivery Filters
Select Delivery Options
Calculate Audience Recipients
1. Delivery Details:
April 3rd Message
Schedule
Immediate (no schedule set)
Target Groups
This message is targeted for the following audience groups:
No target audience selected
Do Not Email Groups
This message will not be sent to anyone in the target audience who are members of the following Do Not Email groups:
None specified
Filters Applied
After applying the filter conditions, this message will be sent to the target audience members who:
Filter Condition
Filter Type
No filters were selected
About Email Filtering
Delivery Options
After applying the selected delivery options, this message will be sent:
No options were selected
Delivery Notifications
The following e-mails will receive status notifications
There are no e-mails setup for notifications
Next
or
Cancel


Blackbaud CRM™
Application features
Add new
Home
Constituents
Marketing and Communications
Revenue
Events
Memberships
Prospects
Volunteers
Foundations
Sponsorship
Fundraising
Shortcuts
Add this page to shortcuts
Manage my shortcuts
Recent searches
Constituent search
Transaction search
Marketing and Communications
Planning and other tasks
Planning calendar
Constituent density map
Appeal
Appeal search
Add an appeal
Appeal mailings
LO Email Communication
Luminate Online Email Interactions

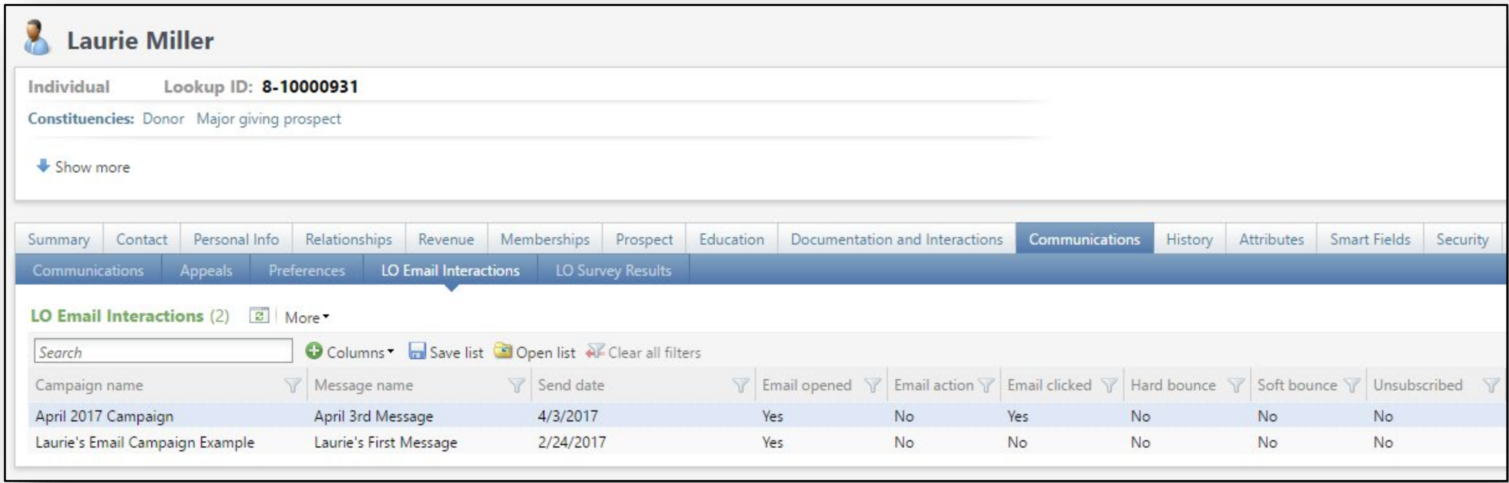


SYNC PROCESS CONFIGURATIONS

The configuration options for the Email Delivery Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Email Campaign Deliveries Sync).

Email Recipient Sync

The Email Recipient Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. It brings over information on email recipient from **Luminate Online** into a new table in **BBCRM**, which is surfaced on the constituent's record.



SYNC PROCESS CONFIGURATIONS

The configuration options for the Email Recipient Sync Process should not be changed (available under Administration > Data Integration > Luminate Online Sync > Sync Process List Tab > "Edit" Email Campaign Recipients Sync).

PERSONAL FUNDRAISING

The Personal Fundraising Campaign Sync, Personal Fundraising Champion Sync, and Personal Fundraising Gift Sync are all one-way sync processes from **Luminate Online** to **Blackbaud CRM**.

The Personal Fundraising Campaign Sync will bring over information on the campaign. The Personal Fundraising Champion Sync will associate the champion with the campaign. The Personal Fundraising Gift Sync will bring over the associated revenue transactions.

A code table entry of “Personal Fundraising” must be added to the Revenue Recognition Credit Type code table before running the Sync. The champion will then receive “Personal Fundraising” recognition credit on the transactions. An attribute can be also added to the revenue transactions with the name of the campaign through a query import mapping.

Workflow

Personal Fund is set-up in Luminate Online

Donations come through Personal Fundraising Page

Sync process runs

Constituent record created for personal fundraiser If the constituent does not already exist.

New payments in LO are brought to CRM as LO staging revenue

Query Import process runs

Process in CRM runs to separate payments into different batch templates

Batches are commited into CRM and posted to the GL through nightly process

Business Considerations

Type	Description
Assumption	All donations from personal fundraising will sync to **BBCRM** through the Personal Fundraising Gift sync process. The revenue will be synced into a staged revenue table (similar to all other revenue processes) to be processed via query import into batch.
Policy	It is required to have one fund per campaign. If a constituent renews their fund for an additional year (such as an annual birthday fund), they can create an additional fund under the Personal Fundraising Campaign, but the details of the fund (Name, Date, etc.) will not flow to **Blackbaud CRM**. Only the Campaign data syncs to **BBCRM**.
Assumption	Additional Gifts query imports need to be created to separate the Personal Fundraiser revenue from standard donation revenue into separate Enhanced revenue batches. A new ad-hoc query will be defined using the following **Luminate Online** fields to identify Personal Fundraiser revenue and leveraged to create the Revenue attributes in **BBCRM** (personal fundraising fields will be added to the existing LO staged revenue query view):
Assumption	The recognition credit will be applied to the personal fundraiser with the type of "Personal Fundraising Credit" in addition to the hard credit recognition given to the donor.

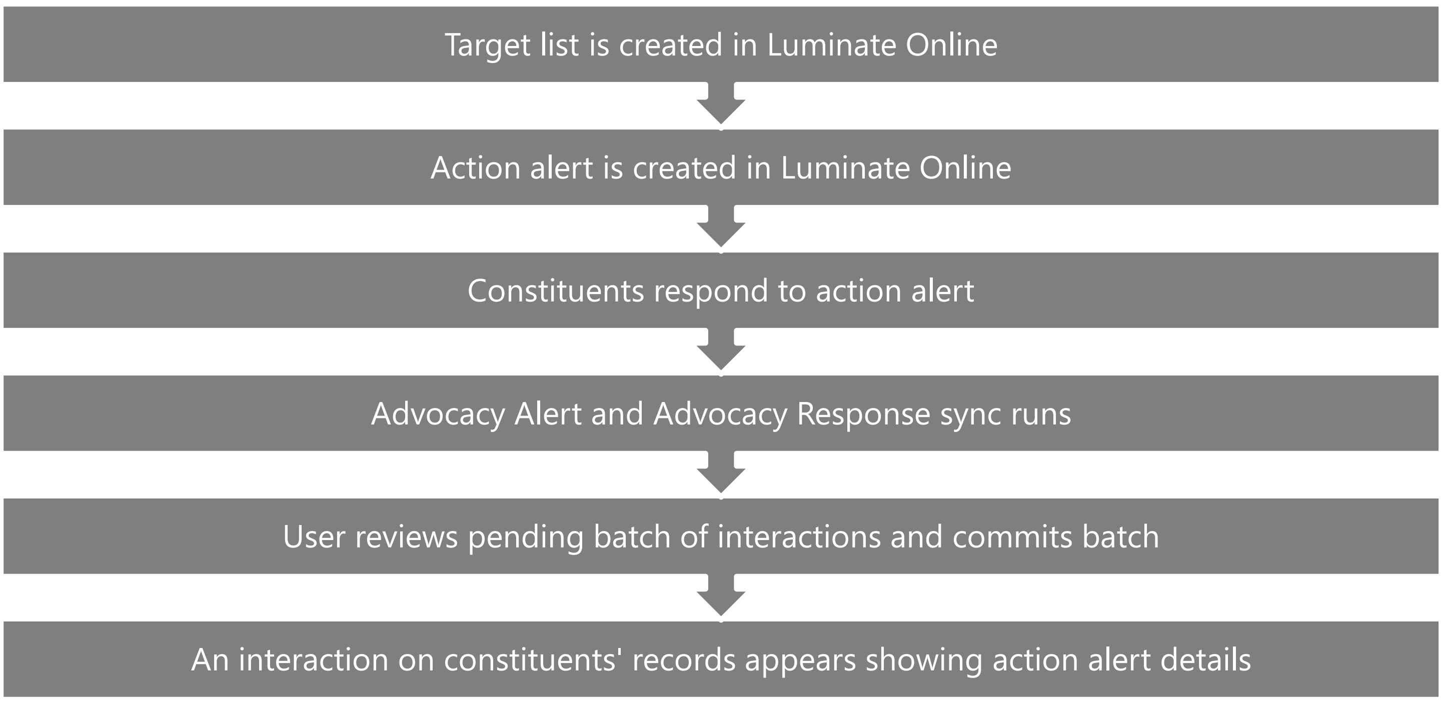
LO Field(s)	CRM Attribute Name
Campaign Name + Campaign ID	Personal Fundraising Campaign

ADVOCACY

The Advocacy Alert Sync and Advocacy Response syncs are both one-way sync processes from **Luminate Online** to **Blackbaud CRM**.

The Advocacy Alert Sync will bring over information on the advocacy alert. The Advocacy Response Sync will bring over specific data on the advocacy alert responses.

Workflow



Business Considerations

Type	Description
Policy	Advocacy processes will be managed in **Luminate Online**. Advocacy activity is meant to be managed in **LO** and only viewed in **BBCRM** to provide a full view of the constituent.
Policy	As part of the baseline Constituent sync process, advocate actions in **Luminate Online** will flag the constituent with an “Advocate” constituency in **BBCRM**.
Policy	The default source code on the action alert should be entered in **Luminate Online** to explain the method of contact for the advocacy action. This field is populated in the BBCRM Interaction Contact Method (prefixed with ’LO-’).

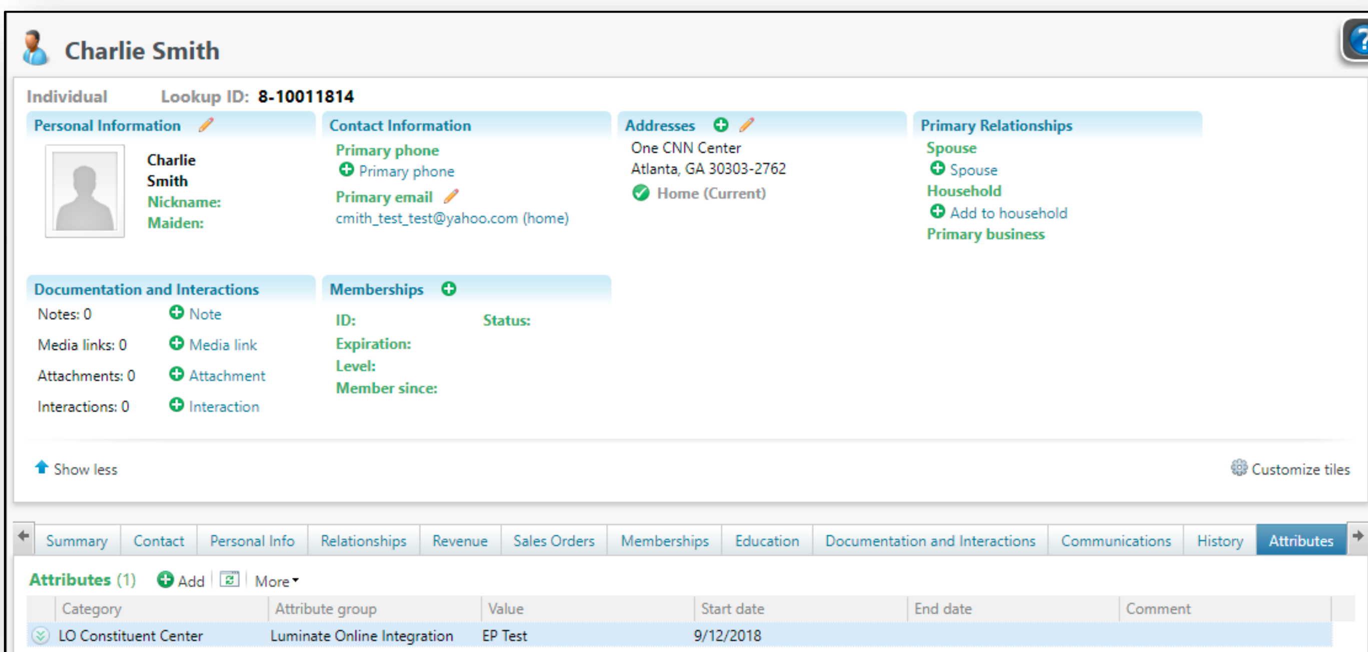
MULTI-CENTER SYNC

Overview

The Center Sync is a one-way sync from **Luminate Online** to **Blackbaud CRM**. This sync brings down the "Center" and "Center Member" records and then utilizes a Global Change process to create the "LO Constituent Center" attribute on the Constituent record with the value of the attribute being the name of the LO Constituent Center.

Steps to create this attribute in **LO** and sync to **BBCRM**:

1. Create a new Center in **LO** (Constituent360 > Centers)
2. Add a member to your center (click on "view members" on your center then "add members")
3. Sync the constituent.
4. Sync the Center.
5. Map the Center to a site in **BBCRM** (Administration > Sync Setup Options > *Multi-Centers Configuration*)
6. Sync the Center member.
7. Add a new Global Change for the *LO Constituent Center Attribute Add Global Change*, provide a name for the Global Change process and run the GC to add an attribute to the constituent for the center.
8. Attribute of "LO Constituent Center" with Value = [LO Center Name] will be added to the constituent record



Note — Additional OOB BBCRM global changes can be configured to add the BBCRM Site field to constituents utilizing the attribute as the criteria.

Sync Process Configurations

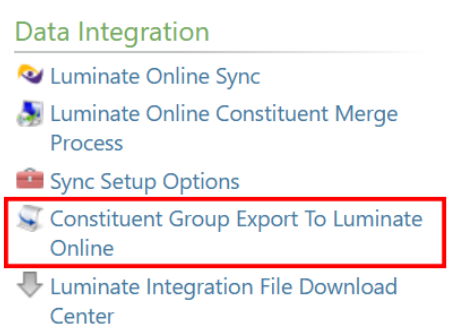
The configuration options for the Center and Center Member Sync Processes should not be changed (available under Administration > Data Integration > Luminate Online Sync > Center / Center Member Process List Tab > "Edit" Survey Sync).

CONSTITUENT GROUP EXPORT

This is a feature to export a selection of constituents from **BBCRM** into a **Luminate Online** constituent group. This process can either create a new group, update an existing group, updating existing (incremental with deletes), or delete and re-create a group.

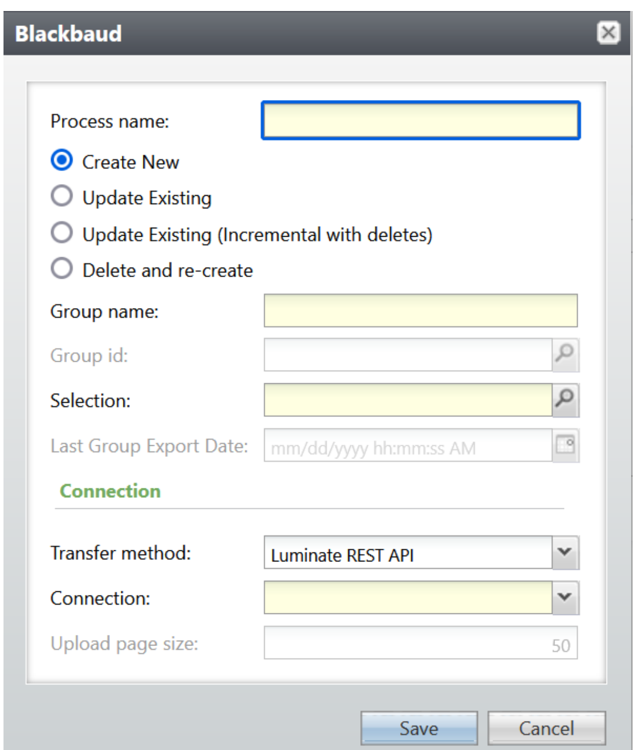
Workflow

This area is accessed through the *Constituent Group Export to Luminate Online* task via the Administration functional area:



On this page, a list will show all existing constituent group export processes.

1. To create a new one, select the "Add" button. The Add constituent group export process form appears.

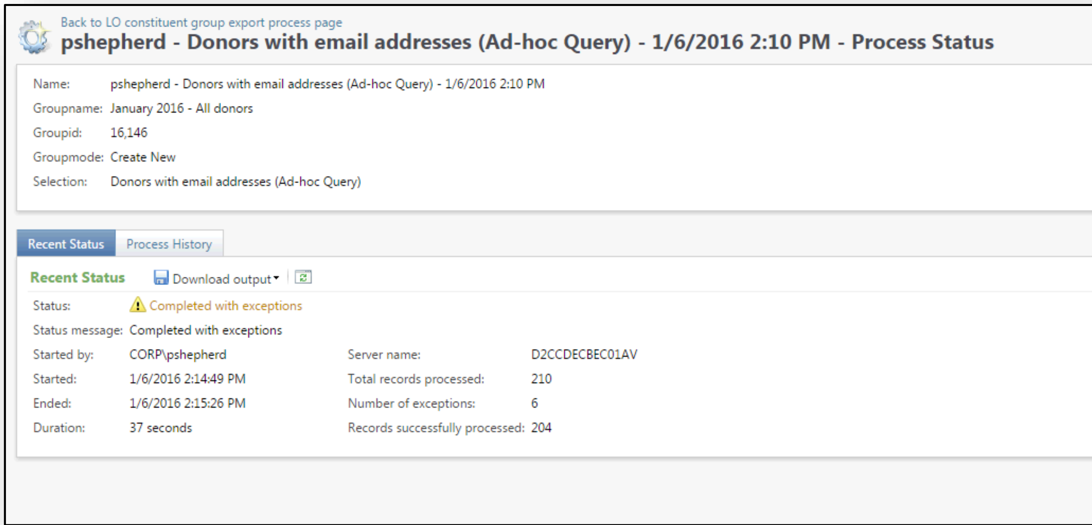


- **Process name**: The name for the export process
- **Select the appropriate export type**:
    - **Create New**: this option will create a new group.
    - **Update Existing**: this option will only add records from the selection results to the LO Group, it does not track changes (i.e., Constituents removed from the selection).
    - **Update Existing (Incremental with deletes)**: this option creates a universe table that is populated with all records from the selection included. Every run in "Update Existing (Incremental with deletes)" mode after that will compare the current selection results with the list in the universe table and only add or remove the constituents from the LO group that need to be added or removed.
        - This option will add records that are new to the universe table as of the "Last Group Export Date," which is automatically updated each run but can be manually adjusted as needed.
    - **Delete and re-create**: this option will delete the current group in LO and creates a new group again from scratch with the most current selection results.
- **Group name**: If *Create new* is selected, specify the name for the group in LO.
- **Group id**: If an existing group is being updated (or deleted and re-created), search for and select the appropriate group.
- **Selection**: search and select the Blackbaud CRM constituent selection to be exported.

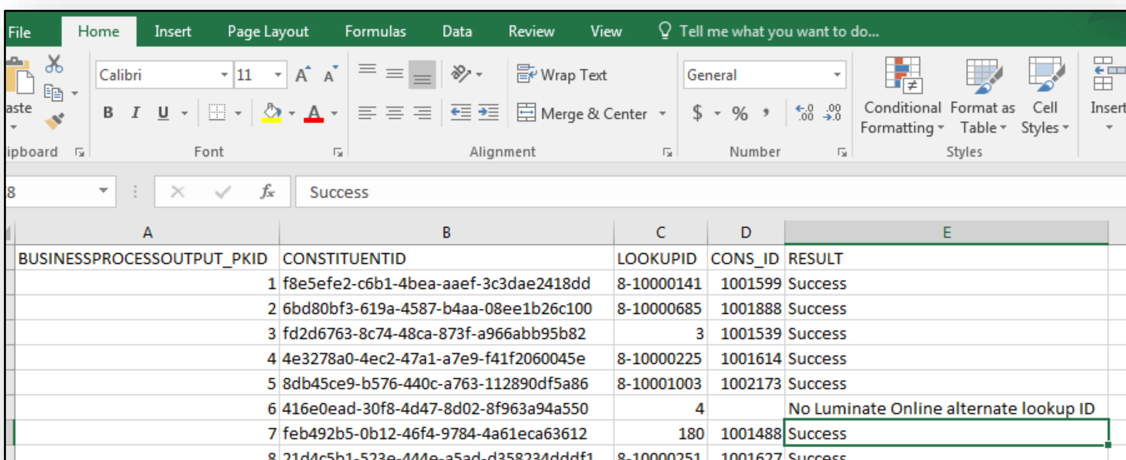
Note — If the query criteria for the selection is complex, it is recommended to use a static selection to avoid time-out issues.

- **Transfer method:** select whether to use the Luminate REST API or Luminate Web Services
    - The Luminate Web Services method is faster as it can add 50 records at a time compared to 1 record with the REST API.
    - The Luminate Web Services option causes all records to have their last modified date updated though which will prompt the Constituent Sync to pull these records the next time it runs.
    - It is also recommended to use a unique Connection if using Luminate Web Services. That will allow a specific LO user to be associated with the export and any records modified by that user can be removed by adding that LO user ID to the Luminate User Contact IDs to exclude field. It is also recommended to run the Constituent Export directly after the Constituent Sync to prevent losing actual data updates.
    - For more information refer to the Constituent Group Export LWS option within the **LO-CRM Connector Installation and Upgrade Guide**.
- **Connection**: the connection to use for the export process. For more information, refer to *Luminate Online Connection.*
- **Upload page size**: If Luminate Web Services was selected for the transfer method, then enter the upload page size. This defaults to 50.

2. After saving this window, select "Start Process" to create or update the group in **Luminate Online**.

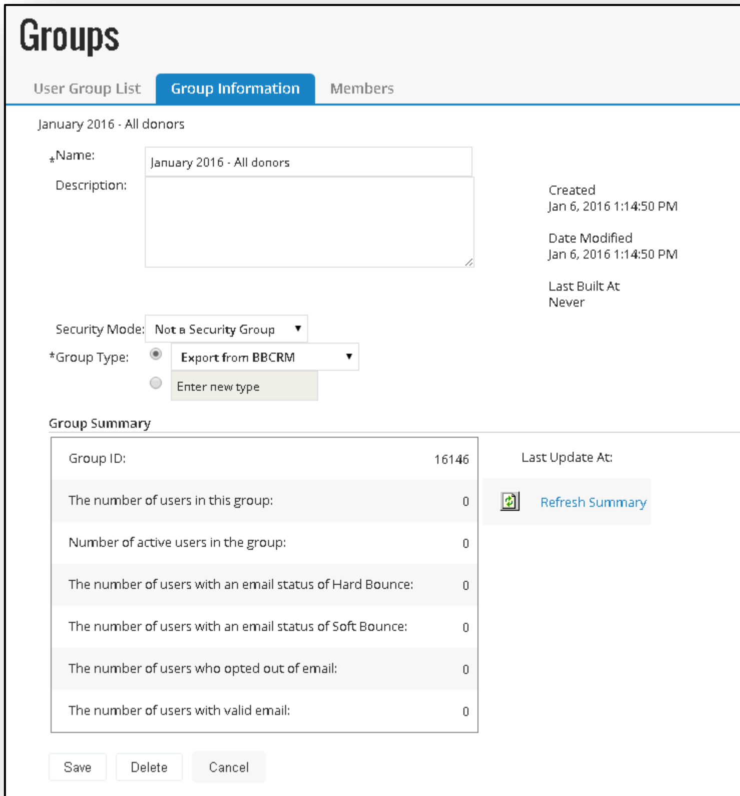


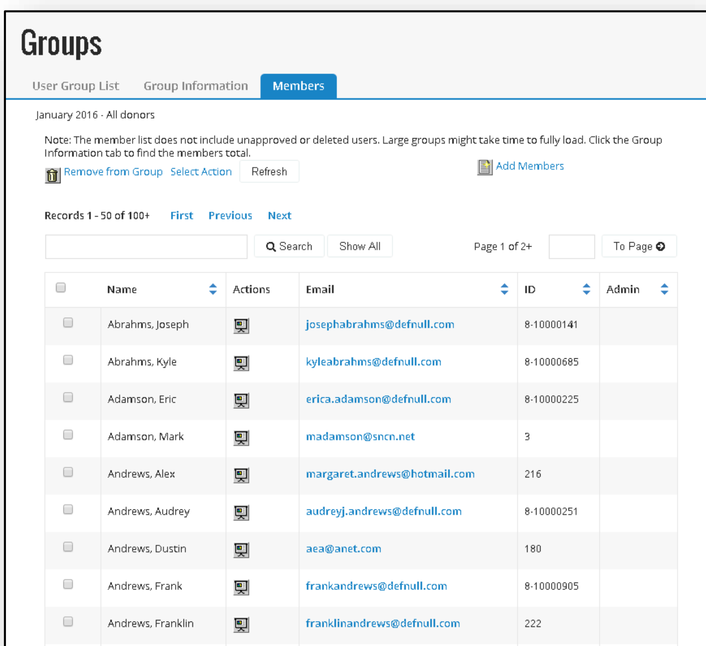
3. Once the process completes, download the output to view the list of the constituents and their result for each record.



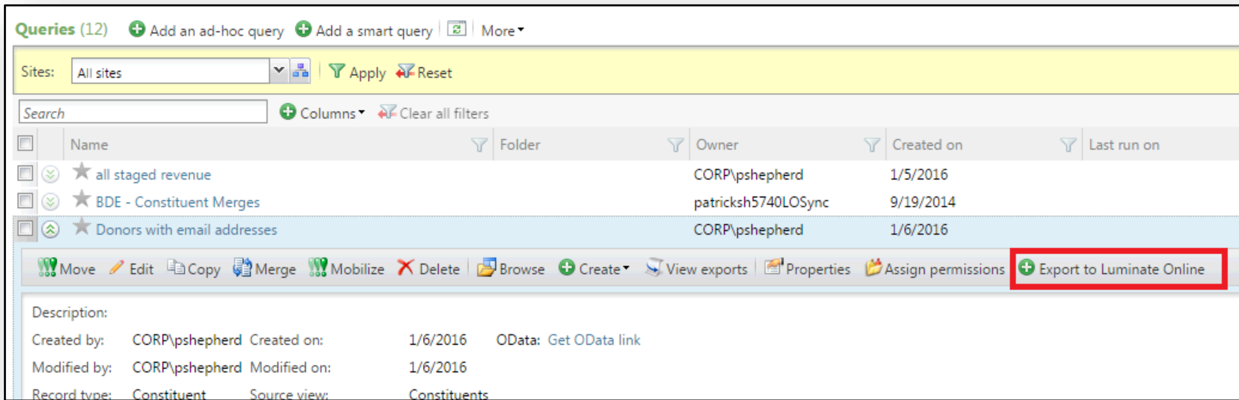
A	B	C	D	E
BUSINESSPROCESSOUTPUT_PKID	CONSTITUENTID	LOOKUPID	CONS_ID	RESULT
1	f8e5efe2-c6b1-4bea-aaef-3c3dae2418dd	8-10000141	1001599	Success
2	6bd80bf3-619a-4587-b4aa-08ee1b26c100	8-10000685	1001888	Success
3	fd2d6763-8c74-48ca-873f-a966abb95b82	3	1001539	Success
4	4e3278a0-4ec2-47a1-a7e9-f41f2060045e	8-10000225	1001614	Success
5	8db45ce9-b576-440c-a763-112890df5a86	8-10001003	1002173	Success
6	416e0ead-30f8-4d47-8d02-8f963a94a550	4		No Luminate Online alternate lookup ID
7	feb492b5-0b12-46f4-9784-4a61eca63612	180	1001488	Success
8	21d4c5b1-523e-444e-a5ad-d358234dddf1	8-10000251	1001627	Success

4. In **Luminate Online**, the group will now appear in the list with a group type of "Export from BBCRM".


Groups
User Group List
Group Information
Members
January 2016 - All donors
*Name:
January 2016 - All donors
Description:
Created
Jan 6, 2016 1:14:50 PM
Date Modified
Jan 6, 2016 1:14:50 PM
Last Built At
Never
Security Mode:
Not a Security Group
*Group Type:
Export from BBCRM
Enter new type
Group Summary
Group ID: 16146
The number of users in this group: 0
Number of active users in the group: 0
The number of users with an email status of Hard Bounce: 0
The number of users with an email status of Soft Bounce: 0
The number of users who opted out of email: 0
The number of users with valid email: 0
Last Update At:
Refresh Summary
Save
Delete
Cancel


Groups
User Group List
Group Information
Members
January 2016 - All donors
Note: The member list does not include unapproved or deleted users. Large groups might take time to fully load. Click the Group Information tab to find the members total.
Remove from Group
Select Action
Refresh
Add Members
Records 1 - 50 of 100+
First
Previous
Next
Search
Show All
Page 1 of 2+
To Page
Name
Actions
Email
ID
Admin
Abrahms, Joseph josephabrahms@defnull.com 8-10000141
Abrahms, Kyle kyleabrahms@defnull.com 8-10000685
Adamson, Eric erica.adamson@defnull.com 8-10000225
Adamson, Mark madamson@sncn.net 3
Andrews, Alex margaret.andrews@hotmail.com 216
Andrews, Audrey audreyj.andrews@defnull.com 8-10000251
Andrews, Dustin aea@anet.com 180
Andrews, Frank frankandrews@defnull.com 8-10000905
Andrews, Franklin franklinandrews@defnull.com 222

Note — You can also create a Constituent Group Export process directly from the Information Library, using an action on the specific selection. If the button does not appear, make sure that "Record Type" is displayed as a column in the list-builder.



CONSTITUENT MERGES

Overview

Standard day-to-day processing of constituents through the **LO-CRM Integration** can result in multiple **Luminate Online** constituents linked to the same **BBCRM** constituent. This can happen in two ways:

1. When the Constituent Update Batch identifies a potential match for a new inbound **LO** constituent, the matching **BBCRM** constituent may already be linked to another **LO** constituent. If the user accepts the suggestion and commits the batch, the **BBCRM** constituent will now be linked to two **LO** constituents.
2. Two or more constituents that were linked to separate LO profiles are merged in **BBCRM** using the standard **BBCRM** merge functionality.

In either scenario, the result will be one constituent with multiple "**Luminate Online**" alternate lookup IDs on their record.

LO Constituent Merge Process

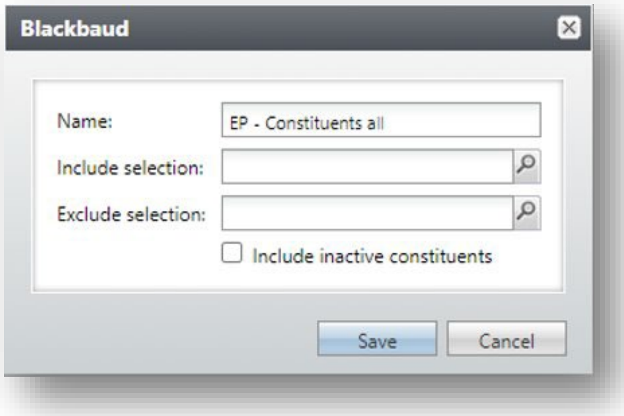
The **Luminate Online Constituent Merge Process** was created to resolve any scenario where a constituent has more than one "Luminate Online" alternate lookup ID on their record in **BBCRM**. After this process is kicked off in **BBCRM**, information is sent to **LO** instructing it to merge source constituent(s) into a single target constituent to retain a 1:1 match between the constituents in **BBCRM** and **LO**.

When the process runs, it uses the following logic to determine which **LO** constituent to keep (the *target* constituent) for **BBCRM** constituents linked to multiple **LO** constituents:

1. Keep the profile that the constituent most recently logged into.
2. If 1 yields no winners, keep the profile that was created by the constituent.
3. If 2 yields no winners, keep the profile that was most recently created.

After the process completes, all of the **LO** alternate lookup IDs for non-target constituents are removed from the associated **BBCRM** constituent.

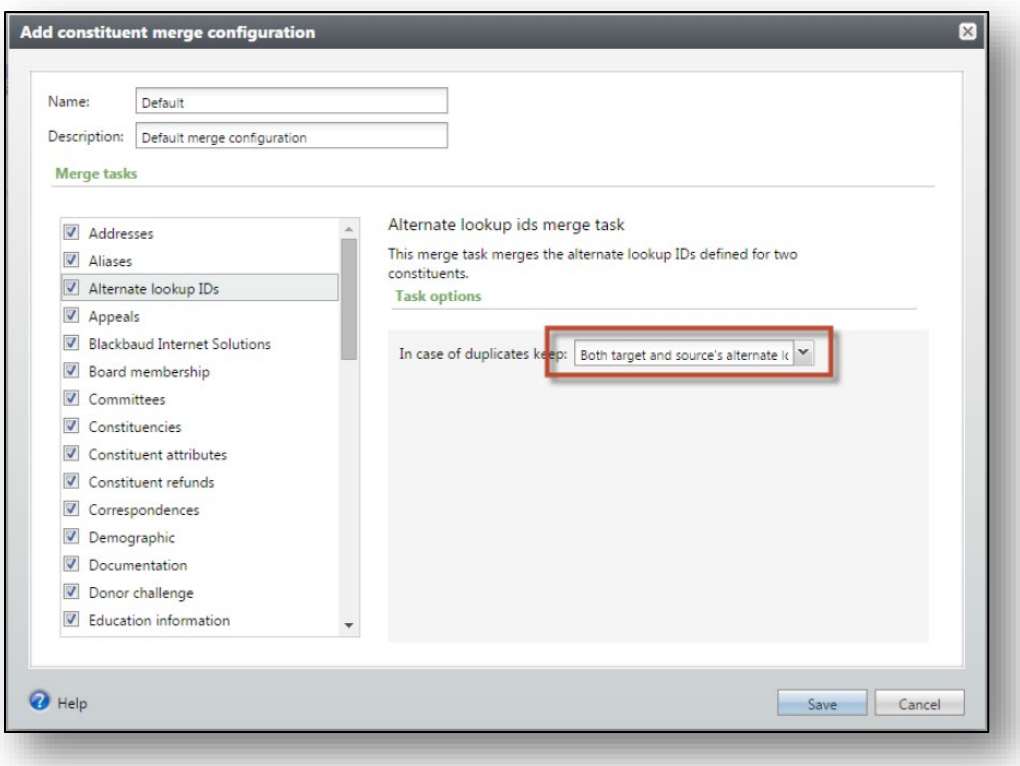
The sync's merge process is located under Administration > Data Integration > Luminate Online Constituent Merge Process. The process can accept a ***static*** selection of constituents to include or exclude from the processing. If no selection is provided, the process will run for all constituents in **BBCRM** linked to multiple **LO** constituents (i.e. all constituents with multiple Luminate Online alternate lookup IDs). A checkbox is also present to include inactive constituents.

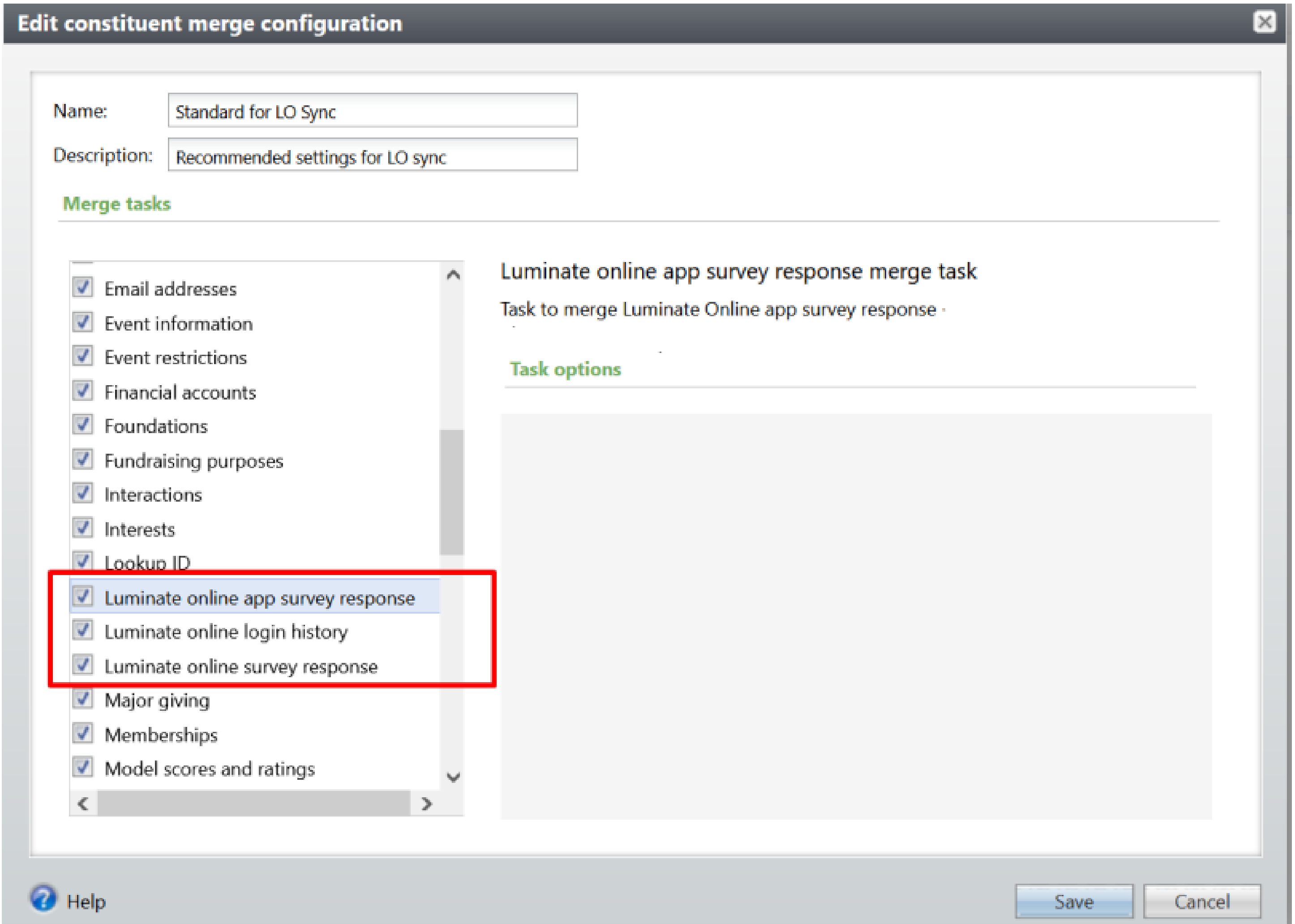


BBCRM Constituent Merge Configuration

The standard constituent merge functionality can be used in **BBCRM** with the **LO-CRM Integration Solution**. However, in order to ensure that the LO Constituent Merge Process handles these records appropriately, the following settings must be in place on all merge configurations:

- Alternate lookup IDs: Keep both target and source's alternate lookup IDs
- Luminate Online app survey response: Checked
- Luminate Online login history: Checked
- Luminate Online survey response: Checked




Edit constituent merge configuration
Name:
Standard for LO Sync
Description:
Recommended settings for LO sync
Merge tasks
Email addresses
Event information
Event restrictions
Financial accounts
Foundations
Fundraising purposes
Interactions
Interests
Lookup ID
Luminate online app survey response
Luminate online login history
Luminate online survey response
Major giving
Memberships
Model scores and ratings
Luminate online app survey response merge task
Task to merge Luminate Online app survey response
Task options
Help
Save
Cancel

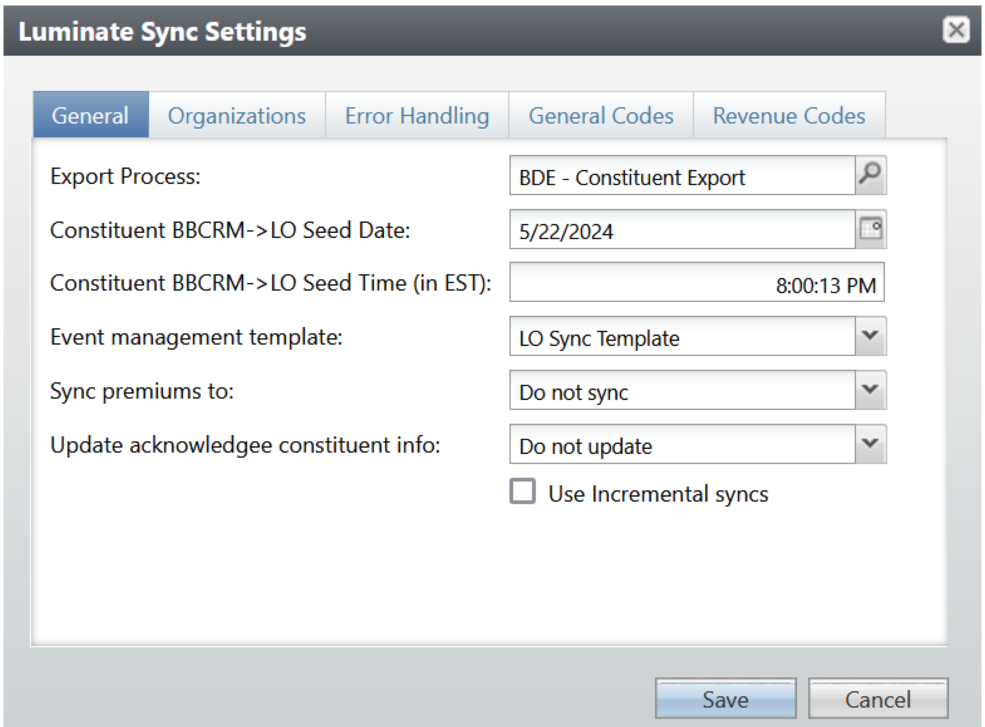
SYNC SETUP OPTIONS

Global Settings

The **LO-CRM Connector** includes several settings that affect multiple processes. These settings are managed under Administration > Sync Setup Options > Global Settings.

GENERAL

The *General* tab includes several configuration options used through the **LO-CRM Connector**:



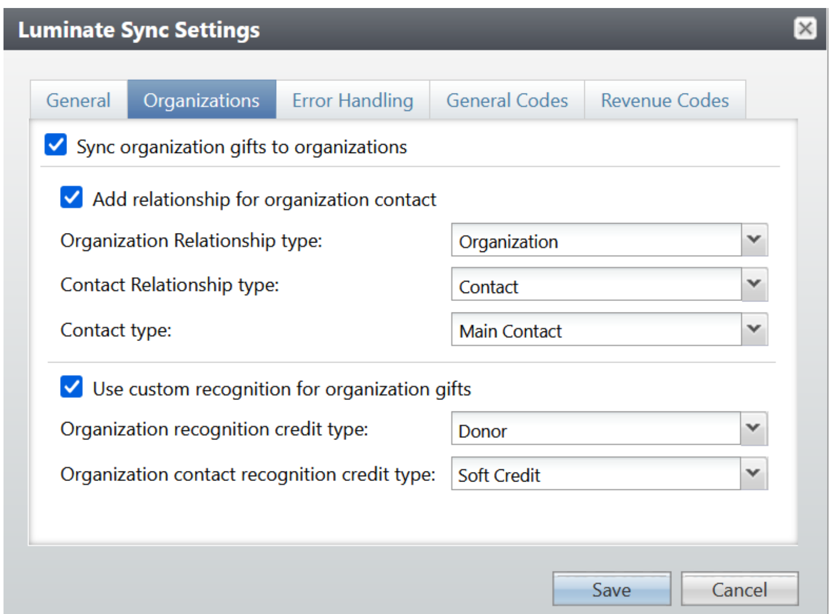
- **Export Process**: Defines the Export Process used for the CRM > LO Constituent Sync. This defaults to the 'BDE – Constituent Export'. This Export Process should not be changed.
    - For more information refer to the *Blackbaud CRM → Luminate Online* section.
- **Constituent BBCRM -> LO Seed Date**: Sets the seed date for the CRM > LO Constituent Sync.
    - For more information refer to the *Blackbaud CRM → Luminate Online* and *Seed Dates* sections.
- **Constituent BBCRM -> LO Seed Time (in EST)**: Sets the seed time for the CRM > LO Constituent Sync.
    - For more information refer to the *Blackbaud CRM → Luminate Online* and *Seed Dates* sections.

- **Event management template**: Defines the event management template used for multi-level events.
    - For more information refer to the *Calendar Events* section.
- **Sync premiums to**: Defines whether premiums should be synced as benefits.
    - For more information refer to the *Premiums* section.
- **Update acknowledgee constituent info**: Defines whether acknowledgee constituent data should be updated if matched to an existing constituent when syncing Tributes.
    - For more information refer to the *Acknowledgee Matching* section.
- **Use Incremental syncs**: Defines whether Incremental processing should be used.
    - For more information refer to the *Incremental Processing* section.

ORGANIZATIONS

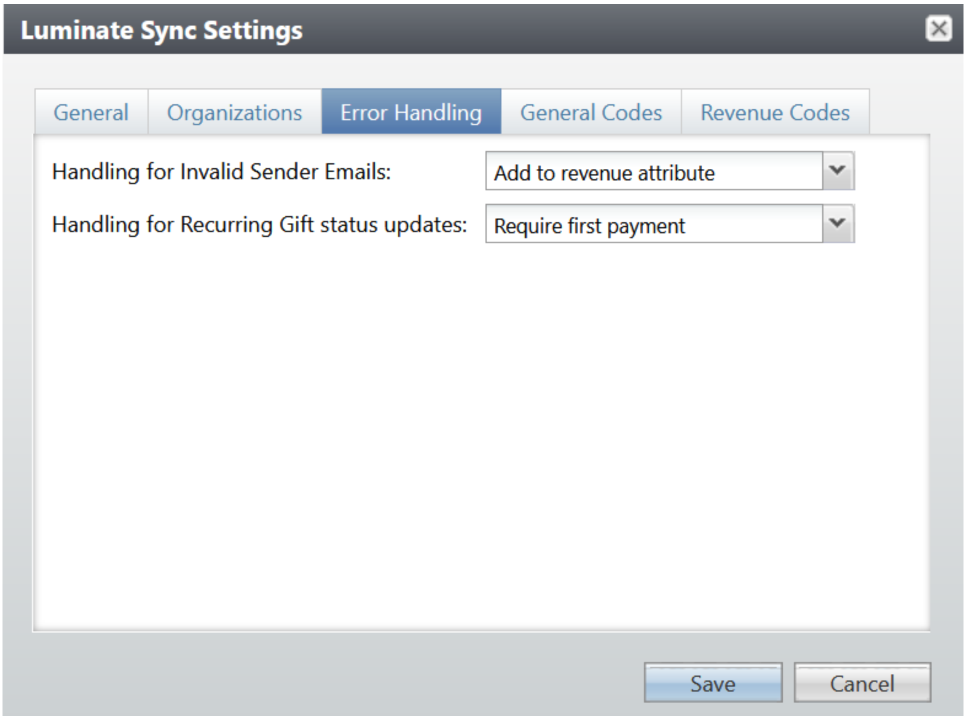
The *Organizations* tab includes several settings to define if and how organization gifts will sync from **Luminate Online** to **Blackbaud CRM**.

- For more information refer to the Organization Module section.



ERROR HANDLING

The *Error Handling* tab includes options for how to address errors that occur under several scenarios.



HANDLING FOR INVALID SENDER EMAILS

The Handling for Invalid Sender Emails setting allows the following options for when invalid emails appear when syncing Tribute data.

- **Throw error:** this is the default setting; an error is presented.
- **Add to revenue attribute:** this option does not throw an error, but it does add the invalid Sender Email address value as a "Luminate Invalid Sender Email Address" revenue attribute.
- **Ignore:** this option will not throw and error and does not add a revenue attribute

HANDLING FOR RECURRING GIFT STATUS UPDATES

The Handling for Recurring Gift status updates allows the following options when a recurring gift status change appears in the sync before the first payment has been created.

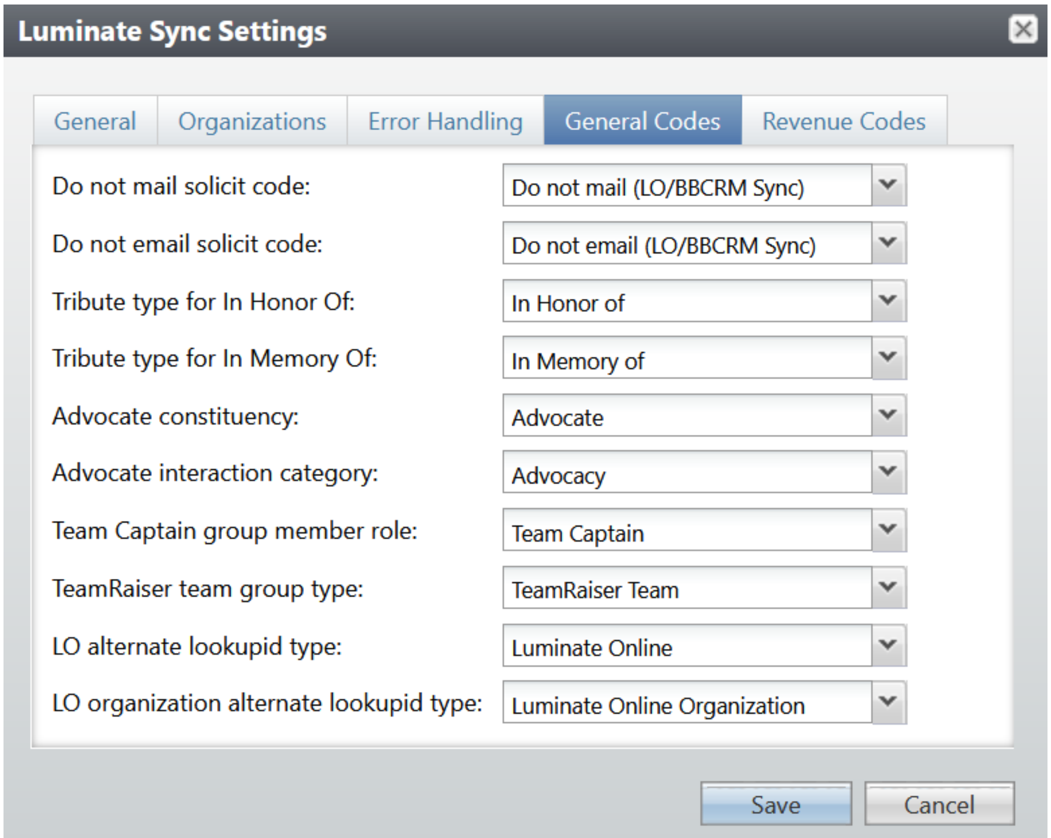
- **Require first payment:** this is the default setting; the recurring gift status cannot be updated if the first payment has not synced over. Any updates will be marked as waiting on a dependent record until the first payment is committed. Once the payment has been committed, the recurring gift status update will automatically reprocess in the next sync.
- **Always allow updates:** this option allows the recurring gift status to be updated even if the first payment has not been committed.

GENERAL CODES

The General Codes tab provides settings for how to sync code table values.

This allows the flexibility to rename codes or use ones that already existed in the system, instead of requiring ones with specific guids created upon install.

Note — For upgrades, these settings are all automatically set based on the old, hardcoded values expected so no additional configuration is required. For new installations, these codes will need to be set manually.



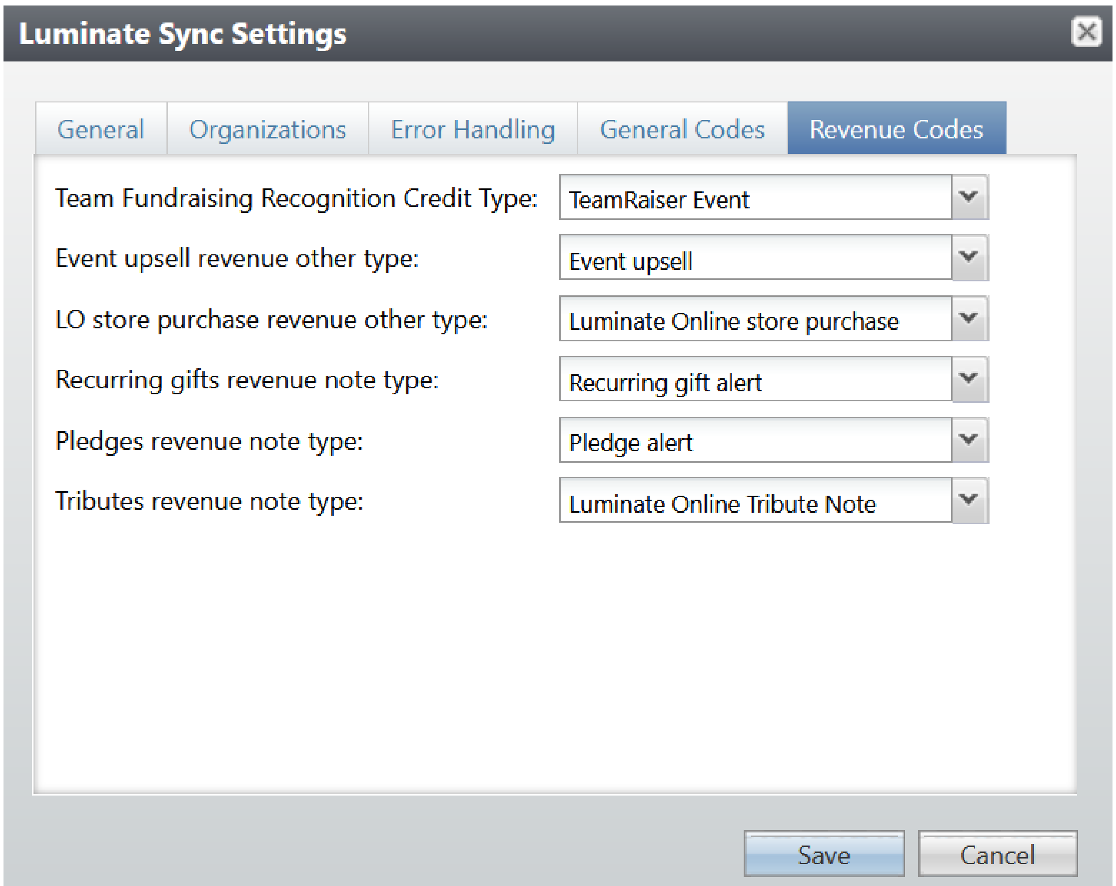
- **Do not mail solicit code**: solicit code for records receiving the 'Do not mail' code from **LO**
- **Do not email solicit code**: solicit code for records receiving the 'Do not email' code from **LO**
- **Tribute type for In Honor Of**: Tribute type code for revenue that includes a tribute record with the 'In Honor Of' code in **LO**
- **Tribute type for In Memory Of**: Tribute type code for revenue that includes a tribute record with the 'In Memory Of' code in **LO**
- **Advocate constituency**: constituency given to **LO** advocate constituents
- **Advocate interaction category**: The interaction category to use for the Interaction created in **CRM** for advocacy alerts/actions from **LO**.
    - Note: The interaction subcategories for the selected category must be pre-configured to match to the action alert types from **LO**.
- **Team Captain group member role**: group member role given to team captains of LO TeamRaiser Teams

- **TeamRaiser team group type**: group type used for TeamRaiser Team group constituents. (i.e. when a team is made, a group constituent is created, and this is the group type it's given.)
- **LO alternate Lookup ID type**: alternate lookup id type used for LO constituents
- **LO organization alternate Lookup ID type**: alternate lookup id type used for LO organizations

REVENUE CODES

The Revenue Codes tab provides settings for how to sync revenue code table values.

This allows the flexibility to rename codes or use ones that already existed in the system, instead of requiring ones with specific guids created upon install.



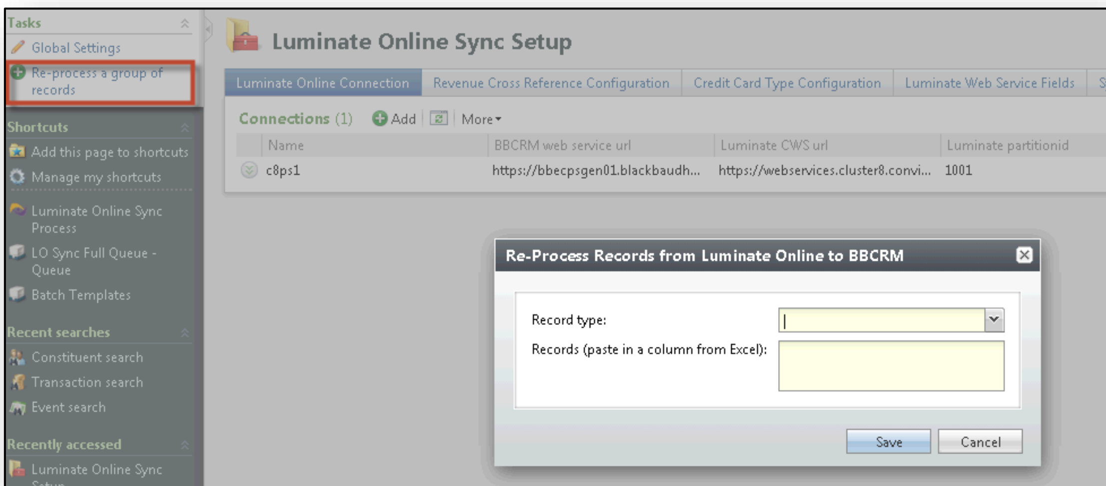
- **Team Fundraising Recognition Credit Type**: when a TeamRaiser gift is made on behalf of a specific registrant, the individual constituent will receive recognition credit on the transaction. If the gift is made on behalf of a team, then the team's constituent group will receive recognition credit.
- **Event upsell revenue other type**: revenue other type used for Event upsell additional applications on TeamRaiser Registration payments
- **LO store purchase revenue other type**: revenue other type used for LO store purchase additional applications on ecommerce transactions.
- **Recurring gifts revenue note type**: note type added to recurring gifts that indicate the gift is managed out of **LO**.

- **Pledges revenue note type**: note type added to pledges that indicate the pledge is managed out of **LO.**
- **Tributes revenue note type**: note type added to revenue containing the tribute message, tribute closing, and tribute signature fields.

Reprocess a Group of Records

The **Re-process a group of records** task on the Sync Set-Up Options page allows a user to paste in a group of IDs for any record type. **BBCRM** will then request those IDs from **Luminate Online** the next time the sync runs.

The values entered should be the **Luminate Online IDs** only, meaning they should not contain any **BBCRM IDs** or prefixes added in **BBCRM**. For example, to reprocess a list TeamRaiser event records, the IDs entered into this tool should be formatted like 1234, not TR-1234.



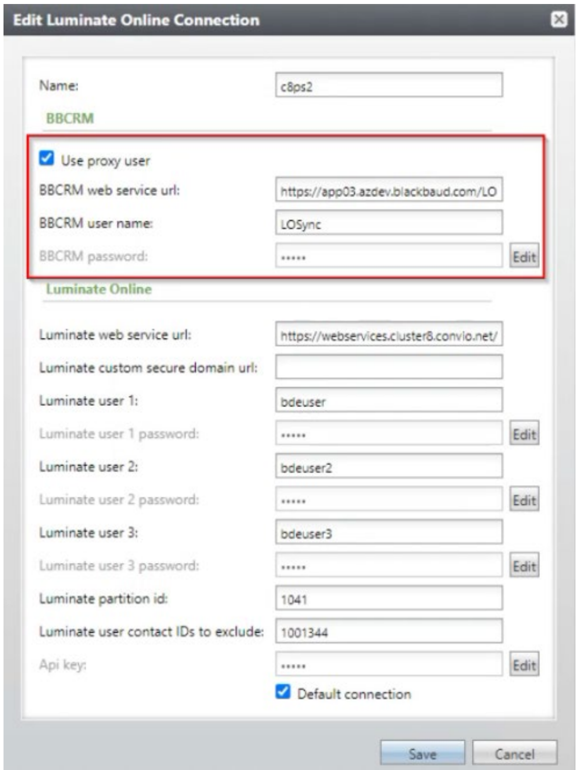
Luminate Online Connection

The Luminate Online Connection tab defines the connection information between **Blackbaud CRM** and **Luminate Online**. For more information on setting up the connection, refer to the **LO-CRM Connector Installation and Upgrade Guide**.

PROXY USERS

To support environments with **BBID** enabled, the Luminate Online Connection can be configured to Use proxy user. For more information on these settings, refer to the Configure sync with proxy user section of the **LO-CRM Connector Installation and Upgrade Guide**, and for more information on proxy users refer to the Service Pack 32 of the **Blackbaud CRM 4.0 New Features Guide**.

If **BBID** is enabled, it is required to use a proxy user for this connection. If **BBID** is not enabled and **BBCRM** is Hosted by **Blackbaud**, it is considered best practice to use a proxy user for this connection.

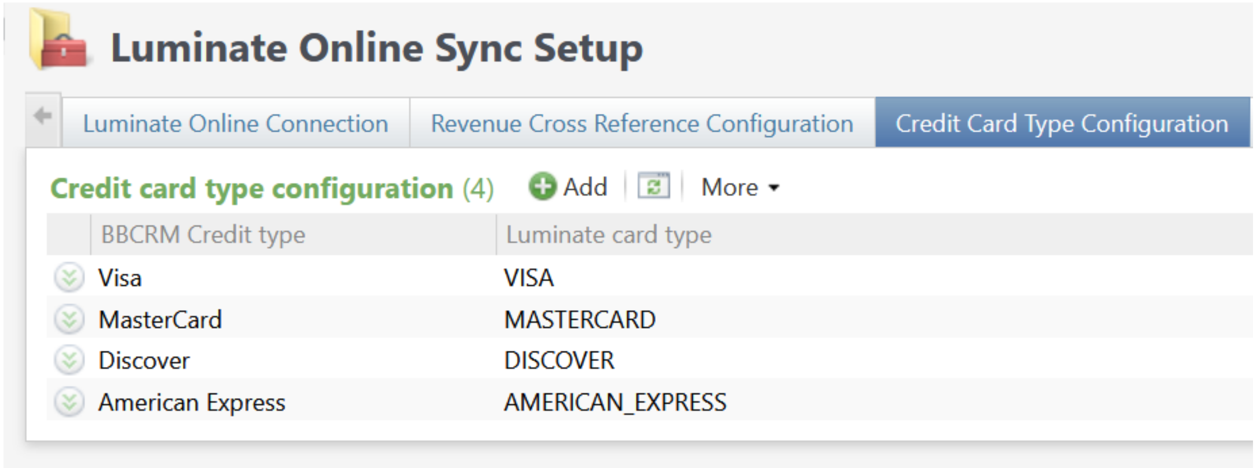


Revenue Cross Reference Configuration

The *Revenue Cross Reference Configuration tab* lists all of the cross references that are configured for the Donations sync. For more information refer to *Cross-References*.

Credit Card Type Configuration

This is available on the *Credit Card Type Configuration* tab of the Luminate Online Sync Setup page, lists all of the mappings of credit card types from **Luminate Online** to the credit card type code table in **BBCRM**.



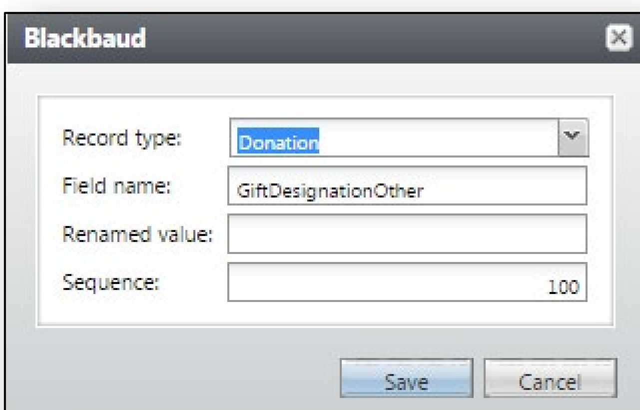
Luminate Web Services Fields

The *Luminate Web Services Fields* tab lists all of the available fields from **Luminate Online**.   It also provides the ability to add new fields for custom mappings and to edit existing fields to show the renamed value from **Luminate Online**.

ADDING NEW FIELDS

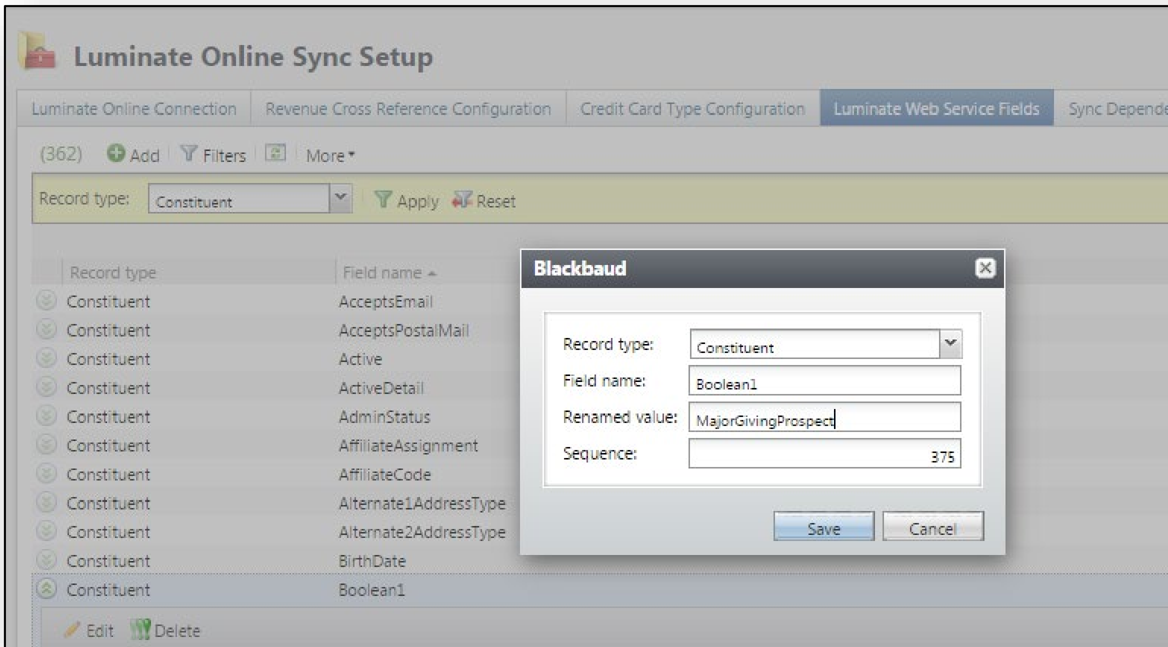
If a field from **Luminate Online** is needed for a custom field mapping in **Blackbaud CRM** but does not yet show in the drop-down, then it needs to be added to the Web Service fields area. These fields are managed from the *Luminate web service* fields tab under Administration > Data Integration > Sync Setup Options.

To add a new Web Service field, click the "Add" button and select the appropriate record type (based on the field's location in the WSDL). The value for field name should exactly match how the field appears in the WSDL. The sequence number can be determined by identifying the number configured for existing fields immediately before and after the new field in the WSDL, then choosing a value that falls between those two numbers.



RENAMING EXISTING FIELDS

Fields in **Luminate Online** may be renamed to better describe the type of customer-specific data that is being stored. This is most common with custom constituent fields, such as String 1 through String 50. If fields have been renamed and are in use by the sync (most likely through a custom field mapping), then they will also need to be renamed in **Blackbaud CRM**. To rename a field in **Blackbaud CRM**, find the field to be renamed in the list of Web Service fields, click "Edit," and enter the renamed value. The value for field name should exactly match how the field appears in the WSDL.



Sync Dependencies

Certain records depend on other data already having been successfully processed into **Blackbaud CRM**. For example, a team cannot be created before its captain's constituent record has been created. Similarly, event revenue cannot be created before the event record has been created and the donor's constituent record has been created.

The **LO-CRM Integration Solution** has two different error prevention methods built into it to avoid errors due to dependent records: Record Type Dependencies and Pending Downloads.

The Record Type Dependencies are configured on the *Sync Dependencies* tab.

RECORD TYPE DEPENDENCIES

Record type dependencies are configurable links between individual sync processes that restrict a dependent sync from running for a date range later than its parent sync.

For example, TeamRaiser teams depend on constituents. If the Constituent sync starts processing a large update of 100,000 constituents at 10:00 AM and is configured with a maximum row count of 20,000, it will need to run five times to process all 100,000 constituents. This could take a significant amount of time. In the meantime, the TeamRaiser Team sync should not be running for any records processed after 10:00 AM, as every record it processes could fail if the captains are new constituents.

Dependencies (28) Add More

Record type	Parent record type
Advocacy Response	Advocacy Alert
Advocacy Response	Constituent
Center Member	Constituent
Donation	Constituent
Ecommerce Revenue	Constituent
Ecommerce Revenue	Products
Personal Fundraising Champions	Constituent
Personal Fundraising Gift	Constituent
Personal Fundraising Gift	Personal Fundraising Campaigns
Premium Log	Constituent
Premium Log	Donation
TeamRaiser Gift	Constituent
TeamRaiser Gift	TeamRaiser Event
TeamRaiser Gift	TeamRaiser Participation Type
TeamRaiser Gift	TeamRaiser Registrant
TeamRaiser Gift	TeamRaiser Team
TeamRaiser Participation Type	TeamRaiser Event
TeamRaiser Registrant	Constituent
TeamRaiser Registrant	TeamRaiser Event
TeamRaiser Registrant	TeamRaiser Participation Type
TeamRaiser Registrant	TeamRaiser Team
Teamraiser Registrant Payment	Constituent
Teamraiser Registrant Payment	TeamRaiser Event
Teamraiser Registrant Payment	TeamRaiser Participation Type
Teamraiser Registrant Payment	TeamRaiser Registrant
Teamraiser Registrant Payment	TeamRaiser Team
TeamRaiser Team	Constituent
TeamRaiser Team	TeamRaiser Event

PENDING DOWNLOADS

The pending download functionality is built to handle scenarios where parent data has not yet been processed into the system (i.e. a constituent record is waiting to be reviewed in an exception batch). If the sync process detects that there is dependent record missing when attempting to bring over an associated record, it will log the attempt as a pending download (i.e. "Waiting on dependent record") in the sync log. Once the records it depends on are committed successfully through a batch, the pending record will automatically reprocess the next time the sync runs. The status in the sync history log for the initial record will switch to "Dependency resolved." The exception to this is revenue data, which will get stored in the revenue staging table regardless, but if it is missing dependent data it will still say “Waiting on dependent record” and unable to be imported. Once the dependency is resolved, the staged revenue record will automatically be allowed to import.

Revenue records that appear in the Sync History Detail tab have the option to “Re-check for dependent record” which behaves the same way the *Recheck Pending Transactions Global Change* does, but on a single record basis. This can be used in two situations: when the dependent record is manually added to **BBCRM** (instead of being created via the sync) or when the constituent to which this transaction is on is marked as Inactive in **BBCRM** (in this case, to apply the revenue the constituent will need to be reactivated and then the click the “re-check for dependent record” button to match the transaction).

Note — Pending downloads will not work if the record they are waiting on is created outside of the normal batch process. For example, if a team is marked as pending because the event has not been created yet, but the event is created through the "Add Event" form instead of the TeamRaiser event batch, the pending record will not automatically reprocess.

Sync Record Type Settings

The *Sync Record Type* Settings tab on the Sync Setup Options page which allows you to choose which configured LO user to use for each sync. If you have partitioning turned on, it will list all syncs. If you do not have partitioning turned on, only the 4 email campaign syncs will appear there. For more information on refer to *Partioning and Incremental Syncs*.

Multi-Centers Configuration

The *Multi-Centers Configuration* tab lists the LO Centers that are mapped to BBCRM Sites. To add a new mapping, click Add and select the Center to map to the corresponding Site.

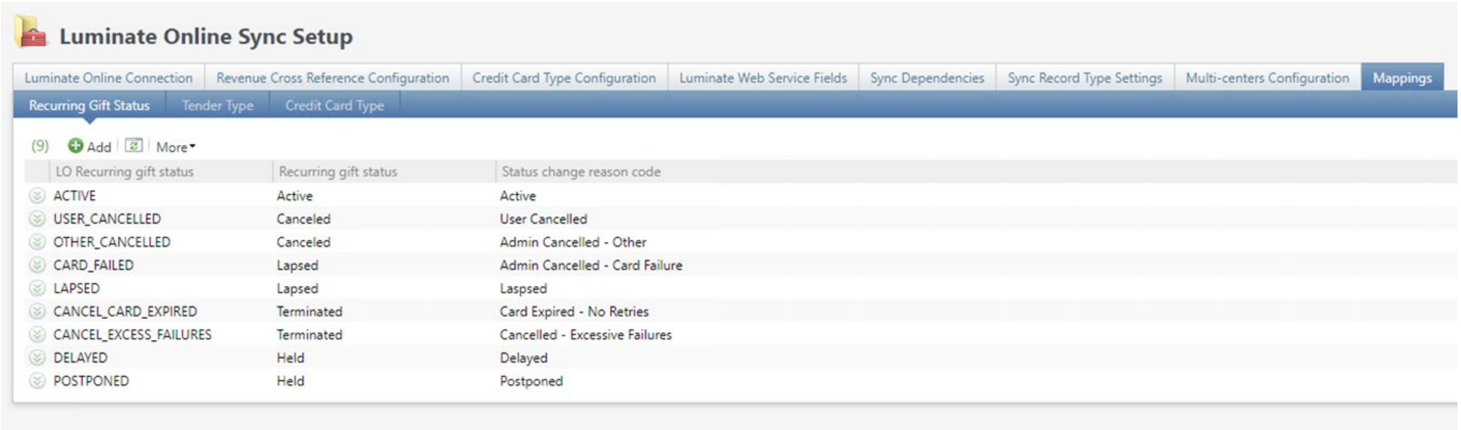
For more information, refer to the *Multi-center Sync*.

Mappings

The *Mappings* tab lists the **LO** to **CRM** mappings for Recurring gift statuses, Tender types and Credit card types.

RECURRING GIFT STATUS

The Recurring Gift Status sub-tab lists the mappings of LO recurring gift statuses to CRM recurring gift statuses and status change reason codes.

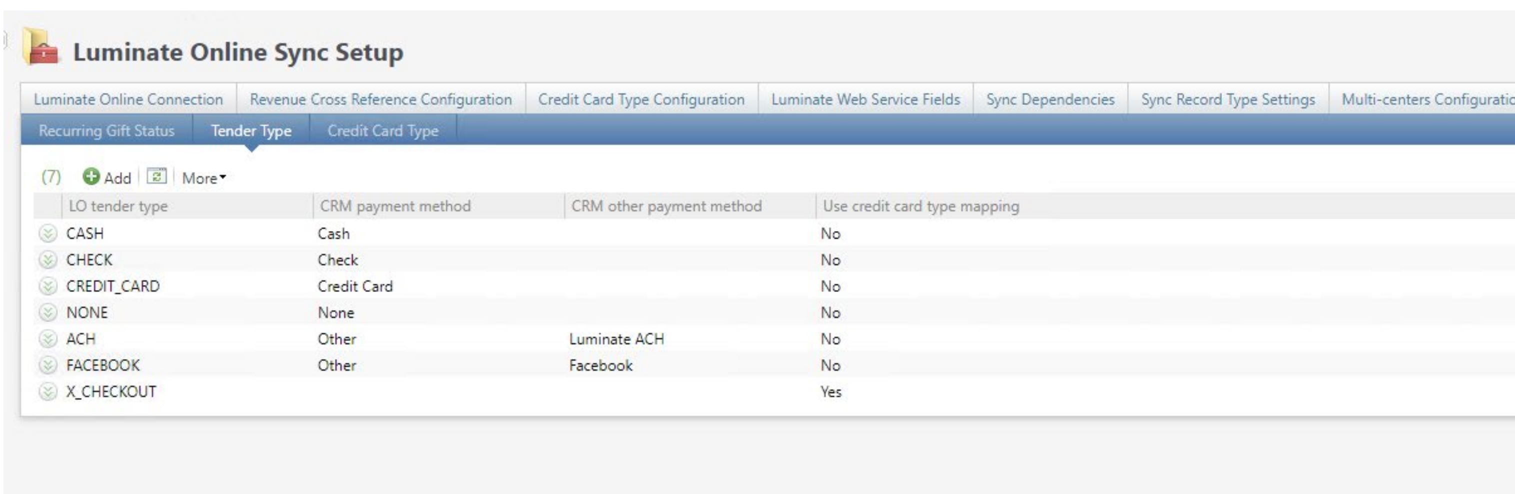


For more information refer to *Recurring Gift Updates*.

TENDER TYPE

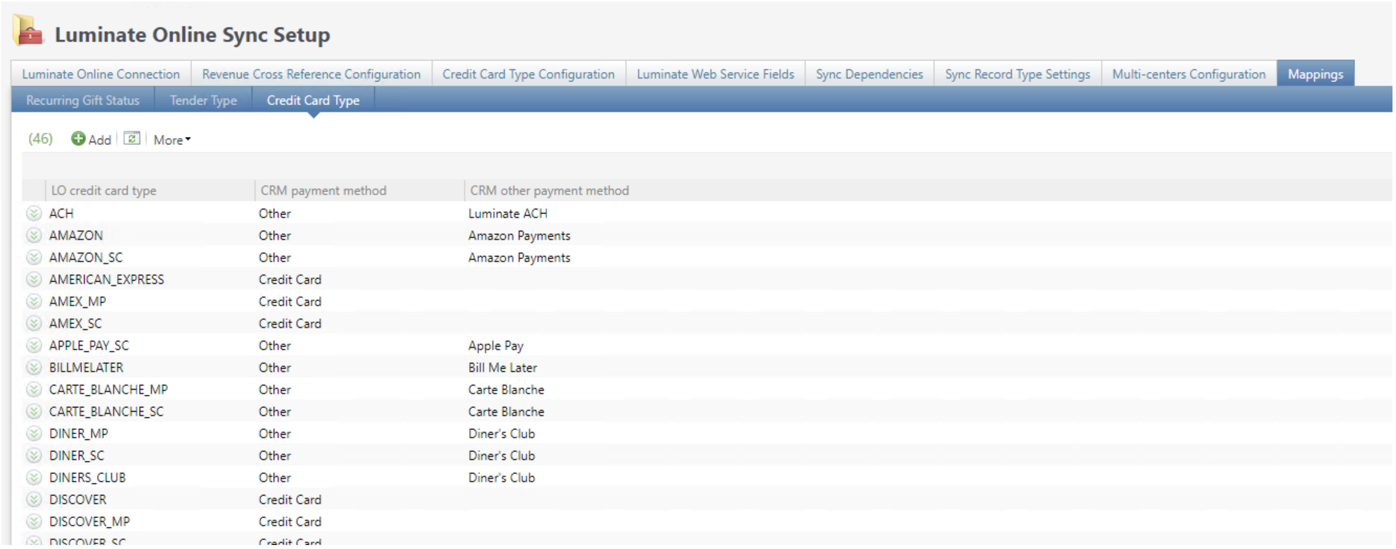
The *Tender Type* sub-tab lists the mappings of tender types from **Luminate Online** to payment methods in **BBCRM**.

- When the CRM payment method is Other, the CRM other payment method value also needs to be mapped.
- If Use credit card type mapping is set to Yes, Credit Card Type mappings (below) will be used based on the corresponding Credit Card type value entered along with the Tender Type.



CREDIT CARD TYPE

The *Credit Card Type* sub-tab lists the mappings of credit card types from **Luminate Online** to payment methods in **BBCRM**.

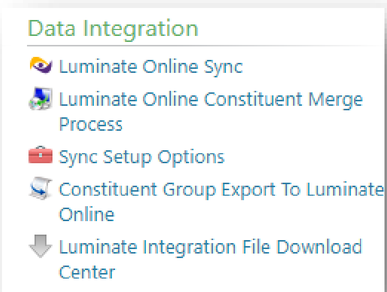


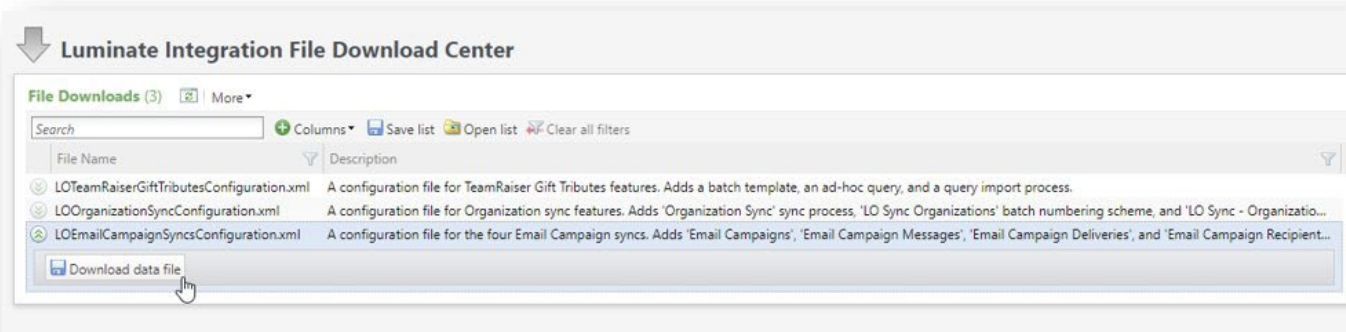
LO credit card type	CRM payment method	CRM other payment method
ACH	Other	Luminate ACH
AMAZON	Other	Amazon Payments
AMAZON_SC	Other	Amazon Payments
AMERICAN_EXPRESS	Credit Card	
AMEX_MP	Credit Card	
AMEX_SC	Credit Card	
APPLE_PAY_SC	Other	Apple Pay
BILLMELATER	Other	Bill Me Later
CARTE_BLANCHE_MP	Other	Carte Blanche
CARTE_BLANCHE_SC	Other	Carte Blanche
DINER_MP	Other	Diner's Club
DINER_SC	Other	Diner's Club
DINERS_CLUB	Other	Diner's Club
DISCOVER	Credit Card	
DISCOVER_MP	Credit Card	
DISCOVER_SC	Credit Card	

LUMINATE INTEGRATION FILE DOWNLOAD CENTER

The Luminate Integration File Download Center, located in Administration > Data Integration, allows for downloading optional config files. Downloading one of these XML files can assist in the setup of the following options:

- TeamRaiser Tributes features
- Organization Sync features
- Email Campaign Syncs





After downloading the files here, they can then be imported in Administration > Configuration data > Configuration import to assist in the creation of batch templates, query imports, etc. For more information on required configurations, refer to the **LO-CRM Connector Installation and Upgrade Guide**.

GLOBAL CHANGES

ConsID Attribute Global Change

The ConsID Attribute Global Change is used to add the LO Alternate Lookup ID to the BBDW to allow for syncing the Interest Events Sync. This global change should be scheduled to run as part of the overall queue for Interest Events if using the Interest Events Sync. For more information refer to the *Interest Events Sync* section.

Create File Global Change

The Create File Global Change is obsolete and has been replaced by newer functionality. This global change should not be run.

Delete Staged Revenue Global Change

The Delete Staged Revenue Global Change is used to delete revenue from the staging tables to prevent it from importing into **Blackbaud CRM**. This may be helpful if a parent record is manually added to **Blackbaud CRM** before being added through the corresponding Sync and to delete old records from the table to assist in database growth management. If deleting old records from the table, it is not recommended to delete records less than a year old.

LO Constituent Center Attribute Add Global Change

The LO Constituent Center Attribute Add Global Change is used as part of the Multi-Center Sync to create the "LO Constituent Center" attribute with the value of the attribute being the name of the LO Constituent Center.

For more information, refer to *Multi-center Sync*.

Luminate Online Duplicates Global Change

The Luminate Online Duplicates Global Change is obsolete and has been replaced by newer functionality. This global change should not be run.

Recheck Pending Transactions Global Change

This global change process can be run to check for any pending transactions in the staging tables of **BBCRM**. If a pending transaction is waiting on a dependent record (i.e. constituent record, registrant record, etc.) and that dependency is manually resolved then this global change will resolve the pending status on the revenue transaction record. This global change would only need to be utilized if users are *manually* resolving dependencies outside of batch. The "Recheck Pending Transactions Global Change" will check all pending transactions and see if the records those transactions are waiting for exist in **BBCRM** or not, and if so resolves the pending status.

Pending Download Delete Global Change

The data affected by the Pending Download Delete Global Change is used for auditing purposes. This global change should not be run without direction from **Blackbaud Support**.

Trim Sync History Global Change

The data affected by the Trim Sync History Global Change is used for auditing purposes. This global change should not be run without direction from **Blackbaud Support**.

PARTIONING AND INCREMENTAL SYNCS

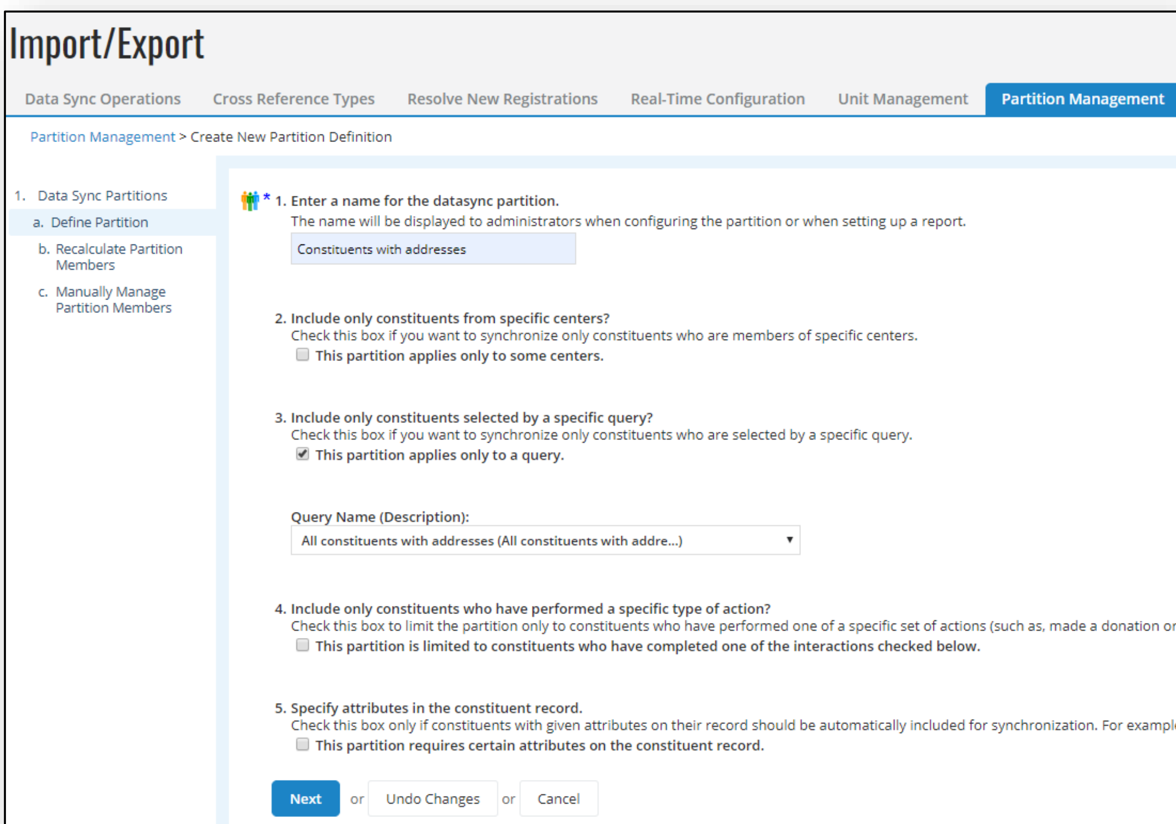
The sync supports using partitions in **LO** to limit what constituents sync over. By default, use of partitioning in the sync is turned off, so the sync will continue to use the normal query method of getting data from **LO**. If you wish to enable the use of partitioning with the sync, go to Administration > Sync Setup Options > *Global Settings* and check the "Use Incremental syncs" box.

Note — Once you turn on partitioning, it cannot be turned off without **Blackbaud** assistance.

Creating a partition in LO

A partition in **LO** is a selection of constituents in the database. By default there is a partition, 1001, which contains all constituents in the **LO** database. This is the partition the sync is currently configured to use. You can create a new partition based on an LO query you create, so that going forward only the constituents you want will be synced over.

After creating an LO query to select the records you want for the partition, you can create the partition by going to Import/Export > Partition Management > Create New Partition Definition.



Once you've created the partition, click Edit on it under Partition Management, then look at the URL. In it you'll see a partition_id, which is what you'll need to configure in the sync connection settings. So in the URL :

https://secure8.convio.net/c8ps2/admin/DataSyncProcess?mfc_pref=T&partition_id=1041&datasync=dsws_edit_partition

you're looking for the partion_id=1041. Whatever number you find there is the id you want.

Once you have that id, you can cancel out of the edit screen.

To configure the sync to use that partition, in **BBCRM** go to Administration > Sync Setup Options > *Luminate Online Connection*, then edit the connection you're using. Set the "Luminate partition id" field to the new partition id you have.

Using partitioning with the sync

When partitioning is turned on, the syncs that support it will use the GetIncremental method of getting data from **LO**, which limits what they pull to what's included with the configured partition. If the incremental syncs have a partial success (i.e. reach the download max rows limit for the sync) then when they next run they will resume the sync session they had with **LO** previously, to continue where they left off. However, there can only be one active sync session per LO user, so if one sync has to resume, then all the other syncs that use the same user and are incremental syncs will be unable to run, because they cannot disturb that active session.

For this reason, we require the sync to have 3 LO users, so that we can make sure certain syncs having errors or a large volume don't affect certain other syncs. Constituents has its own user, the Email Campaign syncs have their own user, and all the other incremental syncs have the third user. This way a large number of Email Campaign Recipients or Donations won't prevent the Constituent sync from running. However, if the Donation sync hasn't finished syncing all its data, then the other syncs using the same user, like TeamRaiser Registrations and TeamRaiser Gifts, will not run until Donations is complete. Also, even when using the query method, the Constituent sync has to establish a sync session for the upload portion, which is why it needs its own user to make sure it doesn't interfere with, or be interfered with by, the Email Campaign syncs.

When an incremental sync still has an active session to complete, other syncs using the same user will get this error in the event log when they're run, though the syncs will say they are successful with 0 records processed:

"The SyncId from CRM does not match the active SyncId from LO and will stop."

If it is absolutely necessary to get a sync that is being held up by another sync to run, even at the cost of the sync with the active session needing to start over again, you can force a new session for the sync you need run by setting a seed date with the force kill session.

Incremental Processing

Incremental processing allows one sync to take over where the last one left off. Not all processes allow for incremental processing.

When an incremental sync has a partial success (i.e. reaches the download max rows limit for the sync) then when they next run they will resume the sync session they previously had with **LO** and continue where they left off. However, there can only be one active sync session per **LO** user, so if one sync has to resume, then all the other syncs that use the same user and are incremental syncs will be unable to run, because they cannot disturb that active session. Even though it is not an incremental sync, the Constituent sync has to establish a sync session to run, and therefore will terminate an existing sync session if it exists so as to not prevent constituents from syncing. This can affect the ability of the incremental syncs to resume from where they left off.

For this reason, it is recommended to create a second LO user (like bdeuser2) and setup a second sync connection to use for the incremental syncs (current Email Campaigns, Email Campaign Messages, Email Campaign Deliveries, and Email Campaign Recipients). This way if the incremental syncs have a large volume and have to resume over multiple syncs, it will not impact the Constituent sync or any other syncs.

When an incremental sync still has an active session to complete, other syncs using the same user will get this error in the event log when they're run, though the syncs will say they are successful with 0 records processed:

"An active sync session syncid 23337 is already running under this user account, and the current sync is trying to create a new session."

Generally it's only the Email Campaign Recipients sync that will hit the max download setting and have to resume, as depending on the environment and frequency that the sync is run, these can number in the hundreds of thousands or sometimes millions. However it is best if all 4 Email Campaign syncs use the same sync connection.

RUNNING INCREMENTAL SYNCS WITH A SEED DATE

When an incremental sync reaches the max download limit and has to continue in the next sync, the session that it had is still considered active in **LO**. If an incremental sync still has an active session and you set a seed date for that sync, that will cause the sync to end it's current session and run with the date you set. The sync will then next run starting from the sync end date of the most recent successful sync. Note that syncs that hit the max download are not considered successful until all pending records are synced, so if you ran the sync with a seed date when it still had an active session, the following sync will resume syncing the dates that the previous sync before the seed date run was processing, but will be starting over from the beginning again. So if the sync had brought over 50,000 out of 200,000 email recipients, then the sync was run with a seed start/end date of a specific day several weeks ago, then after the seed date sync finishes, the sync will start again processing the 200,000 from the beginning, not resuming after the 50,000 it already processed.

If for some reason you need to set the seed date on another incremental sync and need it to run right away when another incremental sync has an active session, you can check the "Force New Session" checkbox on the seed date window. This will terminate any active sessions for that sync user and allow the sync to run with it's set seed date. The sync that had it's session terminated will have to start syncing it's records again from the beginning of that session.