

# Data Tune-Up Guide

07/13/2021Blackbaud CRM 4.0 Data Tune-Up US

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TuneUp-2021

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# Data Tune-Up: Big Picture

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Accurate constituent information is important to ensure your mailings reach the intended recipients and to retain existing donors. When your database is clean and accurate, you can spend more time on your organization's purpose and goals.

In this guide, we discuss the processes you can run on your database to keep your constituent information current.

## Full Circle View

*Data Tune-Up* consists of six different processes that each serve a different purpose: *AddressFinder*, *Address Validation*, *DeceasedRecordFinder*, *EmailFinder*, *PeopleFinder*, and *PhoneFinder*. To access the Data Tune-Up page from *Administration*, click **Data tune-up** under **Tools**. On the Data Tune-Up page, you can access tabs for the following processes.

### ➤ *AddressFinder*

From the *AddressFinder* tab, you can update your records with the most current address information available for your constituents. Before you can update your records, you must first add an *AddressFinder*

process. For more information about this task, refer to the [AddressFinder Process on page 16](#).

### ➤ Address Validation

From the Address Validation tab, you can verify an address is valid in the United States and automatically standardize the format, for example.

**Note:** Address validation differs from the *AddressFinder* process; the address validation process does not update your constituent information with the most current address.

Before you can validate addresses for your records, you must first add an address validation process. For more information about this task, refer to the [Address Validation Process on page 27](#).

### ➤ DeceasedRecordFinder

From the DeceasedRecordFinder tab, you can keep track of deceased constituents in your database. Before you can update your records, you must first add a DeceasedRecordFinder process. For more information about the task, refer to the [DeceasedRecordFinder Process on page 44](#).

### ➤ EmailFinder

From the EmailFinder tab, you can locate email addresses for your constituents and track the changes. Before you can update the email addresses for your records, you must first add an *EmailFinder* process. For more information about this task, refer to the [EmailFinder Process on page 52](#).

### ➤ PeopleFinder

From the PeopleFinder tab, you can locate people who match information from your constituent records by searching over 1,700 databases. Before you can match a list of candidates to your constituents, you must first add a *PeopleFinder* process. For more information about this task, refer to the [PeopleFinder Process on page 59](#).

### ➤ PhoneFinder

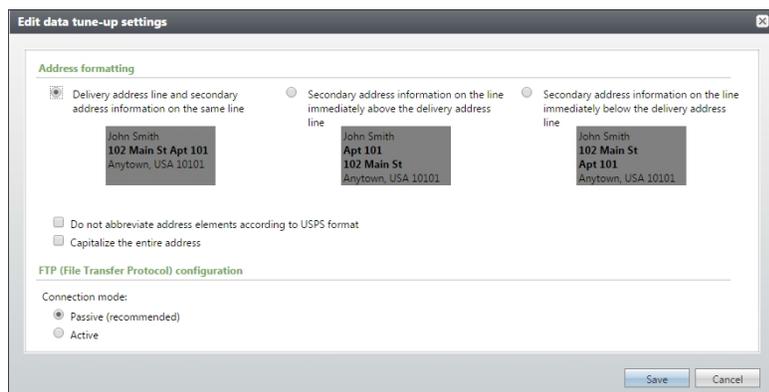
From the PhoneFinder tab, you can locate and track changes to telephone numbers for constituents in your database. Before you can locate telephone numbers for your records, you must first add a *PhoneFinder* process. For more information about this task, refer to the [PhoneFinder Process on page 66](#).

## Edit Data Tune-Up Settings

Before you update your address information, make sure the secondary address formats, abbreviation, and capitalization settings are set as required by your organization.

## ➤ Edit the data tune-up address settings

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Under **Configuration**, click **Data tune-up settings**. The Edit data tune-up settings screen appears.



3. Under **Address formatting**, select how to display secondary address lines such as apartment numbers.
4. To not automatically abbreviate address information to satisfy the United States Postal Service (USPS) standard, select **Do not abbreviate address elements according to USPS format**. If you do not select this checkbox, address updates return in the same format as the original data file.
5. To display addresses in all capital letters, select **Capitalize the entire address**. If you do not select this checkbox, address updates return in an initial capitalization format.
6. The **FTP (File Transfer Protocol) configuration** option defaults to **Active**. When you select **Active**, a Blackbaud server initiates the FTP connection. This can sometimes result in the server attempting to connect through a port on your network that is blocked from outside access by your firewall. When you select **Passive**, your web server initiates the FTP connection. This ensures that the FTP process uses a port on your network that allows file transfers. If you receive an error when you attempt to submit the file, change this option to **Passive** and submit the file again.
7. Click **Save**. You return to the Data Tune-Up page.

## Finder Settings

To use the Data Tune-up services, you must enter your organization's finder settings information on the Edit finder settings screen. From the Data Tune-Up page, click **Finder settings** under **Configuration**. Your organization's credentials include your user name and secret key. Your organization data includes your official address in addition to your organization's [NAICS code](#).

**Note:** If you experience an error when trying to submit your data to Blackbaud, please review the **Blackbaud CRM** system requirements to ensure that your firewall settings are correct.

**Tip:** Contact Support to receive the credentials you need to configure finder settings.

## Data Tune-Up Process Status Page

Whenever you run a Data Tune-up process, the program keeps track of the process so you can view status and history information. You can also set a job schedule to automatically execute a process at a set time. For example, you may want to execute a submit process during your organization's off hours, when no one is working in the records.

To access the status page, you can also click **Go to process** for the applicable step from a process page. Depending on your system role and security rights, you can manage the process from its status page.

## Recent Status Tab

To view information about the most recent instance of the process, select the Recent status tab.

On this tab, you can view:

- The current status of the process to determine whether it completed successfully.
- The status message generated for the most recent run.
- The user who ran the process and on which server.
- The dates and times the process started and ended and its duration.
- The total number of records processed.
- The number of records processed successfully.

- The amount of exceptions generated.

## History Tab

To view information about the previous instances of the process, select the History tab. On this tab, you can view records of the previous instances the process was run.

For each instance, you can view:

- Its status.
- The status message generated for it.
- The user who ran it.
- Its start and end dates.
- Its duration.
- The total number of records processed.
- The server which handled the process.

To view all process instances of a specific status, click **Filter** to display the **Status** field and **Apply** and **Reset** buttons. In the **Status** field, select the status of the processes to display such as "Did not finish", and click **Apply**.

## Delete a Process Status Record

To clean up your database, you can remove previous instances of a process from the History tab of its status page.

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

1. Open the record of the smart field with the instance to delete.
2. Select the History tab.
3. In the grid, select the status record to delete.
4. On the action bar, click **Delete**. A message appears to confirm the deletion of the status record.
5. Click **Yes**. You return to the History tab. In the grid, the status record no longer appears.

## Job Schedules Tab

To view the job schedules set for the process, select the Job schedules tab. In the grid, you can view and manage the job schedules set for the job.

For each job schedule, you can view:

- Its job name.
- Whether it is enabled.
- Its frequency.

- Its start date and time.
- Its end date and time.
- The dates the schedule was added and changed in the database.

## Schedule Process Jobs

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

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

### ➤ Create a job schedule

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

**Create job**

**Details**

Job name:

Schedule type:

Enabled

**One-time occurrence**

Date:  Time:

**Frequency**

Occurs every:  day(s)

**Daily frequency**

Occurs once at:

Occurs every:  Minutes  Starting at:

Ending at:

**Duration**

Starting at:   End date:

No end date

Help Save Cancel

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
  - a. For a process that runs once, select the date and time to run it.
  - b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
  - c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

## Create Job Screen

### Screen Item Description

Screen Item	Description
<b>Job name</b>	Enter a name for the job schedule.
<b>Schedule type</b>	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
<b>Enabled</b>	By default, the scheduled process is active. To suspend the process, clear this checkbox.
<b>One-time occurrence</b>	For a process that runs once, select the date and time to run it.
<b>Frequency</b>	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the <b>Occurs every</b> field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
<b>Daily frequency</b>	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select <b>Occurs once at</b> and enter the start time. To run a process at intervals, select <b>Occurs every</b> and enter the time between instances, as well as a start time and end time.
<b>Start date</b>	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select <b>No end date</b> .

## Edit a Job Schedule

You can edit the settings for a job schedule, such as to adjust its frequency. You can edit a job schedule from the status page of the process.

### > Edit a job schedule

1. On the Job schedules tab, click the double arrows beside the job to edit.
2. Click **Edit**. The Edit schedule screen appears.
3. Edit the information on the screen. For example, you could change the **Schedule Type** and specify a different frequency on which the process should run. The items on this screen are the same as those on the Create job screen. For more information about these items, refer to [Schedule Process Jobs on page 11](#) and the [Create Job Screen on page 12](#).
4. Click **Save** to save the changes. You return to the Job schedules tab.

## Delete a Job Schedule

You can delete a job schedule from a business process, such as if you no longer use it. You can delete a job schedule from the status page of the process.

### > Delete a job schedule

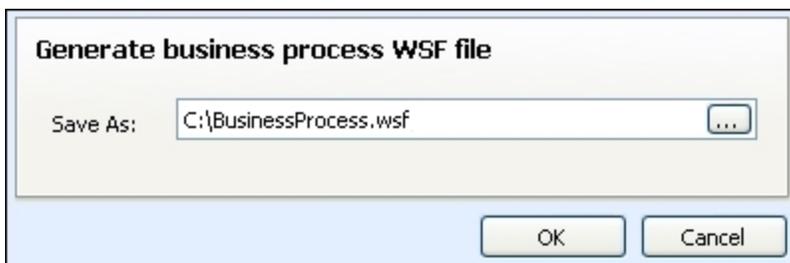
1. On the Job schedules tab, click the double arrows beside the job to delete.
2. Click **Delete**. A confirmation screen appears.
3. Click **Yes** to delete the job. You return to the Job schedules tab.

## Generate a Windows Scripting File

You can generate a *Windows* scripting file (\*.wsf) to use to run a process with an automated launch program such as *Task Scheduler*.

### > Generate a Windows Scripting File

1. Go to the process that requires a Windows Scripting File.
2. Under **Tasks**, click **Generate WSF**. The Generate business process WSF file screen appears.



3. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
4. Click **OK**. The program saves the WSF file.

## Resubmit File to Blackbaud

If, after you run a process, you need to resubmit the data file to Blackbaud, you can do so from the submit process status page. Under **Tasks**, click **Resubmit file to Blackbaud**. The program submits the data file and your organization contact information to Blackbaud.

## Verify Default Batch Templates

To run Data Tune-Up processes, you must use the default batch template for each process. To verify the batch templates exist, from *Administration*, **Batch**, select **Batch entry**, then select **Batch Templates** under Configuration. Verify that the following templates are active:

- AddressFinder Batch
- Address Validation Batch
- DeceasedRecordFinder Batch
- EmailFinder Batch
- PhoneFinder Batch
- PeopleFinder Batch

If a template does not appear in the list, first update filters to include inactive templates. If a template is inactive, expand the row and select **Mark active** to restore it. If it still does not appear, contact Blackbaud Support for assistance.

# AddressFinder Process



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*AddressFinder* helps you keep up with the 40 million Americans who change their address each year. The process provides the most current address information available on your constituents, based on the United States Postal Service's *NCOALink* database.

After you activate your subscription, you can use *AddressFinder* to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. You submit and retrieve information for a process from the process page. For information about the items on the process page, refer to [AddressFinder Process Page on page 19](#).

**Warning:** *AddressFinder* submits only addresses that match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match the USPS NCOA formats generate exceptions when you submit the *AddressFinder* file to Blackbaud. For information about how to view and manage these exceptions, refer to [Download Exceptions for an AddressFinder Create File Process on page 23](#).

## Add an AddressFinder Process

To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

### ➤ Add an AddressFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the AddressFinder tab.
3. Under **AddressFinder process**, click **Add**. The Add AddressFinder process screen appears.

**Add AddressFinder process**

**General**

Name:

Description:

**When process completes, Blackbaud will notify**

Primary contact:

Title:  ▼

Name:

Email address:

Phone number:

Alternate contact:

Name:

Email address:

Phone number:

Help

4. Under **General**, enter a unique name and description to help identify the process.
5. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process. You can create one process for each site. To not base the process on a specific site, leave this field blank.
6. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted addresses and inform when updates are available.

**Note:** For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

7. Click **Save**. The program automatically creates the process and displays its process page. For information about the items on the process page, refer to [AddressFinder Process Page on page 19](#).

## Edit an AddressFinder Process

After you create an *AddressFinder* process, you can easily adjust it as necessary such as to update contact information.

### ➤ Edit an AddressFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the AddressFinder tab.
3. Under **AddressFinder process**, select the process and click **Edit**. The Edit AddressFinder process screen appears. The items on this screen are the same as the Add AddressFinder process screen. For information about the items on this screen, refer to [Add an AddressFinder Process on page 17](#).
4. Edit the information as necessary.
5. Click **Save**. You return to the AddressFinder tab.

## Delete an AddressFinder Process

If you no longer need an *AddressFinder* process, you can remove it from the database.

### ➤ Delete an AddressFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the AddressFinder tab.
3. Under **AddressFinder process**, select the process and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the AddressFinder tab.

## AddressFinder Process Page

When you create an *AddressFinder* process, the program automatically generates a page for the process. To access the process page from the AddressFinder tab on the Data Tune-Up page, click the name of the process under **AddressFinder process**.

At the top of the process page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

From the process page, you can walk through the steps to run *AddressFinder*.

- Step 1: Create the file of the constituents and addresses to check for updated addresses.
- Step 2: Submit the data file to Blackbaud.
- Step 3: After Blackbaud updates the address information in the submitted data file, you can run the retrieval process to transfer the updated file from Blackbaud to a batch in your database. Review the report to make sure the batch is correct.

**Note:** For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

- Step 4: Commit the batch to update your constituent records with new address information.

**Note:** To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

Depending on your system role and security rights, you can edit or delete the process from its process page.

## Edit the Criteria for Constituents Included in an AddressFinder File

When you create an *AddressFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify updated national change of address (NCOA) information. To include only a select group of constituents in the process or base the identification process on an address other than the primary address, you must edit the process criteria.

### ➤ Edit the criteria for constituents included in an AddressFinder file

1. Access the status page of the *AddressFinder* process for which to submit a file. For information about the status page, refer to [AddressFinder Process Page on page 19](#).
2. Under **Step 1: Create file**, click **Edit**. The Edit AddressFinder create submit records process screen appears.

**Edit AddressFinder create submit records process**

**Criteria**

Selected constituents:   

**Addresses**

Include:

- All active addresses
- Primary address only
- Specific address

Address type:  ▼

- Include addresses marked as Do Not Mail
- For households, submit shared addresses once along with primary contact name

**Results**

- Create selection from results

Selection name:

- Overwrite existing selection

 Help

3. Under **Criteria**, choose the selection of constituents to include in the process.
4. Under **Addresses**, select which addresses to include in the process—active addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include in the **Address type** field.
5. Select whether to include addresses marked as Do Not Mail and whether to submit shared addresses only once for households included in the process.
6. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
7. Click **Save**. You return to the process page.

## Create an AddressFinder File Process

To update your addresses with national change of address (NCOA) information, you must create the file of the constituents and addresses to check for updated addresses.

To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

**Tip:** Before you create an AddressFinder file, you may want to check your Data tune-up settings. For more information, see [Edit Data Tune-Up Settings on page 7](#).

**Note:** To conform with USPS requirements, the AddressFinder process requires a minimum of 100 address records to submit the file. If you try to submit a smaller file, you will receive an error. [Adjust the process filters](#) to include more addresses.

**Warning:** *AddressFinder* excludes addresses that do not match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match these requirements generate exceptions when you create the file. For information about how to view and manage these exceptions, refer to [Download Exceptions for an AddressFinder Create File Process on page 23](#).

## ➤ Create an AddressFinder file

**Note:** When you create an *AddressFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify updated national change of address (NCOA) information. To include only a select group of constituents in the process or to base the identification process on an address other than the primary address, click **Edit** under **Step 1: Create file**. For more information, see [Edit the Criteria for Constituents Included in an AddressFinder File on page 20](#).

1. Access the status page of the *AddressFinder* process for which to submit a file. For information about the status page, refer to [AddressFinder Process Page on page 19](#).
2. Under **Step 1: Create File**, click **Start process** to create the data file. After the file processes, **Step 1** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

**Note:** Addresses that do not match the required USPS NCOA formats will generate exceptions. You can download the exceptions file to view which constituents were excluded. Then you can make corrections to addresses on their constituent records and recreate the file before you submit it. For more information, see [Download Exceptions for an AddressFinder Create File Process on page 23](#).

**Note:** To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

## Download Exceptions for an AddressFinder Create File Process

When you create an *AddressFinder* data file, the process only includes addresses that match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match the USPS NCOA formats generate exceptions.

From the *AddressFinder* process page, you can download these exceptions as a comma-separated values (\*.csv) file or a Microsoft *Office* open XML spreadsheet (\*.xlsx) file to view in another program such as Microsoft *Excel*. You can make corrections to addresses on the constituent record and recreate the file before you submit it.

### ➤ Download AddressFinder create file process exceptions

1. Access the *AddressFinder* process page for which to submit a file. For information about the process page, refer to [AddressFinder Process Page on page 19](#).
2. On the process page, under **Step 1: Create file**, click **Download exceptions** and select the format of the file to download  
To download the exceptions as a comma-separated values file, select **Download to CSV**. To download the exceptions as a spreadsheet file, select **Download to XLSX**.
3. On the Save As screen, browse to the location to save the file and enter a file name to help identify the exception file.
4. Click **Save**. The browser downloads the file to the selected location. When the download completes, select whether to open or save the exception file.

## Submit the AddressFinder File

After you create the *AddressFinder* data file, you must run the submit process. This process sends the file to Blackbaud to update addresses.

To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

**Note:** To conform with USPS requirements, the *AddressFinder* process requires a minimum of 100 address records to submit the file. If you try to submit a smaller file, you will receive an error. [Adjust the process filters](#) to include more addresses.

### ➤ Submit an AddressFinder file to Blackbaud

1. Access the status page of the *AddressFinder* process for which to submit a file. For information about the status page, refer to [AddressFinder Process Page on page 19](#).

**Note:** To run *AddressFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *AddressFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

2. Under **Step 2: Submit file to Blackbaud**, click **Start process**. A screen appears with a Processing Acknowledgement Form (PAF). To provide consent to run the process, select **Please acknowledge that Blackbaud is processing your data through the USPS NCOALink dataset** and click **OK**. For more information on the United States Postal Service PAF policies, see <http://kb.blackbaud.com/articles/Article/105383>.
3. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. After the submission processes, **Step 2** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

## Check the Availability of an AddressFinder File

You can check the availability of a pending update file at any time. On the process page, click **Check file availability** under **Step 3: Get file from Blackbaud**. This will enable the rest of the options under **Step 3** so you can retrieve the file. For information about how to retrieve the file, refer to [Start an AddressFinder Retrieval Process on page 24](#).

## Start an AddressFinder Retrieval Process

The retrieval process transfers the updated file from Blackbaud to a batch in your database. To run the retrieval process, click **Start process** under **Step 3: Get file from Blackbaud**. After the file processes, **Step 3** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

Remember to review the AddressFinder report to make sure the batch is correct. For more information, see [View AddressFinder Reports on page 24](#).

## View AddressFinder Reports

After you run the retrieval process and retrieve the updated file from Blackbaud, you can access the AddressFinder Report. This report provides information about the addresses included in the process and indicates which addresses returned change of address information in the update file. To view the AddressFinder Report, on the process status page, click **View report** under **Step 3**.

When you upload the AddressFinder file from Blackbaud, you also receive the United States Postal Service *CASS Summary Report* and the *NCOALink Process Report* generated with the process. To view these reports, click **Get reports from Blackbaud** under **Tasks**.

**Note:** The **Field changed** column displays changes to these address fields: **Address Block**, **City**, **State**, **Country**, and **Post Code**.

## Edit AddressFinder Batch Options

Before you commit an *AddressFinder* batch, you should select process options such as which addresses to update and whether to retain the former address when the process includes a forwardable move. You can also select how to handle each footnote code received from the United States Postal Service (USPS) during an *AddressFinder* process. When you commit an *AddressFinder* batch, the program updates the constituent records with the new or updated addresses, Do Not Mail reasons, and the selected source.

### ► Edit the properties for an AddressFinder batch

1. Access the status page of the *AddressFinder* process with the options to edit. For information about the status page, refer to [AddressFinder Process Page on page 19](#).
2. Under **Step 4: Update addresses**, click **Edit properties**. The Edit AddressFinder process options screen appears.

3. Under **Update options**, select whether to update all addresses with change of address information, only those with forwardable moves, or only those with NCOA changes.
4. To save the former address of a constituent with a forwardable move address change, select **Save former address in constituent address list when there is a forwardable move**. In the **Set address type on former address to** field, select the address type to apply to the former address, such as Former.

5. Under **Map the AddressFinder footnotes and mail grade to the Do Not Mail reasons**, select the Do Not Mail reason codes to associate with the NCOA footnote codes and mail grade received from the USPS during an *AddressFinder* process. You can choose Incomplete, Invalid, Moved, or to leave the reason blank.

**Note:** If you select **Update all addresses** under **Update options** and an address returns an NCOA footnote code other than Forwardable move, the program automatically marks the address as Do Not Mail when you commit the *AddressFinder* batch. To mark an address as Do Not Mail, the program selects **Do not send mail to this address** for the address and displays the selected reason code.

6. Under **Address source**, select the default information source to use for *AddressFinder* updates, such as NCOA or AddressFinder. When the process updates contact information, the program applies this information source to the constituent address information.

**Note:** The program applies the default information source code to only new addresses and updated addresses with no existing source code. If a source code already exists on an address and an *AddressFinder* process updates the address, the program retains the original source code.

7. Click **Save**. You return to the process page.

## Commit AddressFinder Batch

When you retrieve the updated file from Blackbaud, the program generates an *AddressFinder* batch with the National Change of Address (NCOA) information included in the file. To update your records with the NCOA information, you must commit the batch. Before you commit, we recommend you review the possible changes. The batch lists all constituents included in the update file, along with the former address information, new address information, and other information about the update process. When you review the update file, you can edit the information as necessary.

To review and/or edit the batch, under **Step 4: Update Addresses**, click **Edit Batch**. Once you have confirmed the changes, click **Commit batch** to commit the records in the batch to your database. After the batch committal processes, **Step 4** displays the number of records processed, the number of exceptions, and total number of records that were successfully updated.

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

# Address Validation Process

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To update the addresses in your database and certify the addresses with the Coding Accuracy Support Standards (CASS) of the United States Postal Service (USPS) and ensure your mailings reach the intended recipients, you can integrate with a CASS-certified validation provider such as Satori. When you set up an address validation process, users can validate information as they add addresses for constituents. If the address entered is valid, the program automatically updates it accordingly. If the program cannot validate an address, such as when the address is incorrect or provides multiple possible matches, a message appears to ask whether to search for the correct address.

With the address validation process, you can use the service to validate multiple addresses at one time. To view and manage the address validation process for your organization, select the Address Validation tab.

After you configure the integration with your validation service, you can use Data Tune-Up to validate your address information and import and update your records with new information. You validate and retrieve information for a process from the process page. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to [Address Validation Process Page on page 40](#).

**Note:** When users add constituent addresses, they can select to omit an address from the address validation process.

From the Address Validation tab, you can add and manage the address validation process for your organization.

## Address Validation Service Configuration

To use the address validation process, you must first perform several tasks to correctly integrate with your validation service. For example, successful integration requires additional registry keys and configuration of the web server.

- Install the registry keys required to use the validation process. For information about how to install the registry keys, refer to [Configure the Address Validation Registry Settings on page 28](#).
- Install the validation service, such as provided by Satori, to use to validate addresses in your database. For information about how to install the service, refer to [Install the Address Validation Service on page 29](#).
- When you install the service, it exposes a Windows Communication Foundation (WCF) endpoint with the application server as a client. After you install the service, set up your web server to communicate validation requests with the WCF service. For information about how to configure the web server, refer to [Configure the Web Server for Address Validation on page 31](#).
- To use an address validation provider other than Satori, create a new Class Library project and add a reference to the Blackbaud.AppFx.AddressValidation.Service.exe. Within this project, create a class that implements the four interfaces required for address validation providers: IValidationProvider, IAddressValidation, IAddressBrowser, and IAddressPresort. After you create the class in the project, build and copy the \*.dll file to a location on your address validation server.
- To use an address validation provider other than Satori, or if you select to configure the provider after you install the service, configure the validation service provider. If you use a provider other than Satori, you map to the \*.dll file created for your validation service. For information about how to configure Satori or another provider for your validation service, refer to [Configure an Address Validation Provider on page 34](#).
- After you install the service and set up the web server, configure whether to enable address validation for the countries applicable to the service. For information about how to configure countries for address validation, refer to [Configure Address Validation for a Country on page 38](#).

## Configure the Address Validation Registry Settings

To use the address validation process, you must install required registry keys. To install these registry keys, run the Address Validation Registry utility.

### ➤ Run the Address Validation Registry utility

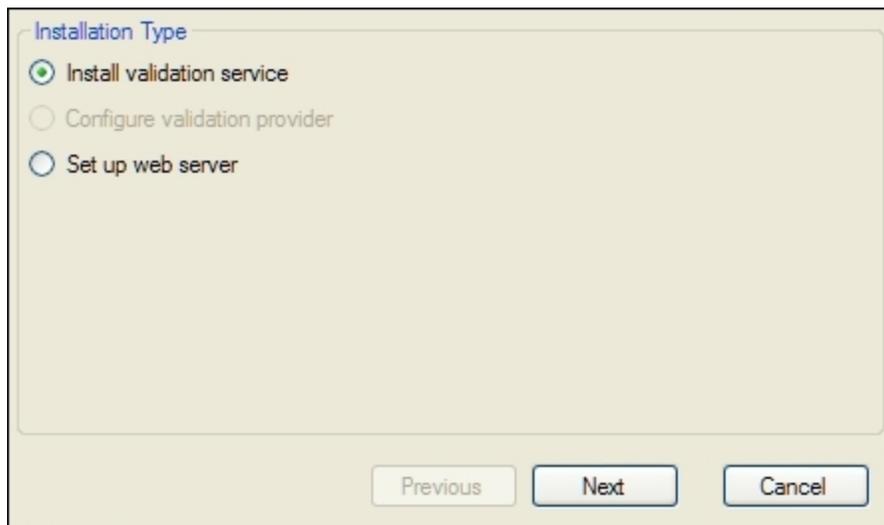
1. On the application start page, click **Utilities**. The Utilities, Gadgets, and Reference page appears.
2. Under **Utilities**, click **Address Validation Registry Settings**. After the utility downloads, a message appears to ask whether to run the utility.
3. Click **Run**. After the utility successfully runs, a message appears.
4. Click **OK**. You return to the Utilities, Gadgets, and Reference page.

## Install the Address Validation Service

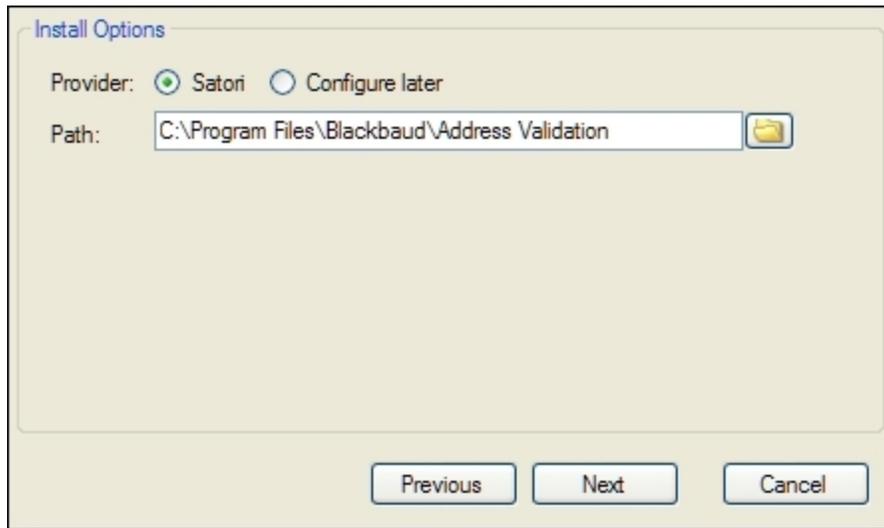
To validate addresses in your database, you must install the address validation service. To install this service, you must run the Address Validation Install utility. When you install the service, it exposes a Windows Communication Foundation (WCF) endpoint with the application server as a client. Any validation requests from the browser are sent through the application server to the WCF service. After you install the service, you must set up your web server to communicate with the WCF service.

### ➤ Install the address validation service

1. On the application start page, click **Utilities**. The Utilities, Gadgets, and Reference page appears.
2. Under **Utilities**, click **Address Validation Service Deployment**. The Address Validation Install utility appears.



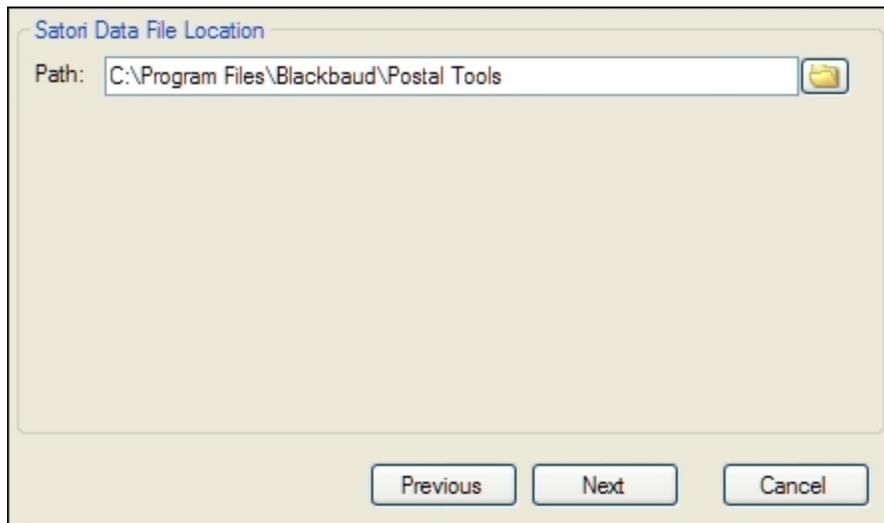
3. Under **Installation Type**, select **Install validation service** and click **Next**. The Install Options screen appears.



4. For **Provider**, select whether to use Satori or another provider for the address validation service. To use another provider, select **Configure later**.

**Warning:** If you select **Configure later**, you must configure a provider before you use the address validation service. For information about how to configure your provider, refer to [Configure an Address Validation Provider on page 34](#).

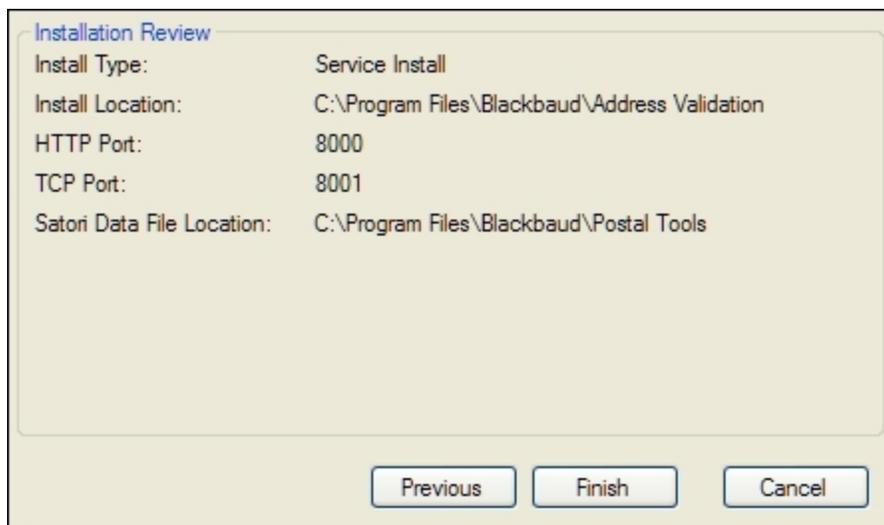
5. In the **Path** field, browse to the location to install the address validation service.
6. Click **Next**. The Satori Data File Location screen appears.



7. Under **Satori Data File Location**, browse to the Postal Tools folder created when you install the validation service.
8. Click **Next**. The Service Options screen appears.



9. Under **Service Options**, enter the Hypertext Transfer Protocol (HTTP) and Transmission Control Protocol (TCP) ports and click **Next**. The Installation Review screen appears.



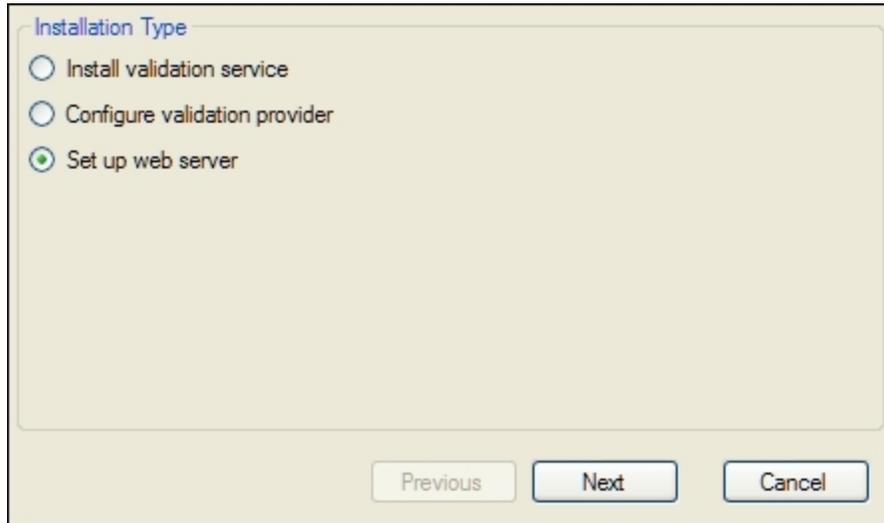
10. Under **Installation Review**, verify your installation settings are correct. To adjust a setting, click **Previous** to access the applicable screen of the installation utility.
11. Click **Finish**. After the utility successfully installs the service, a message appears.
12. Click **OK**. You return to the Utilities, Gadgets, and Reference page.
13. Set up the web server to communicate with the validation service. For information about how to configure your web server, refer to [Configure the Web Server for Address Validation on page 31](#).

## Configure the Web Server for Address Validation

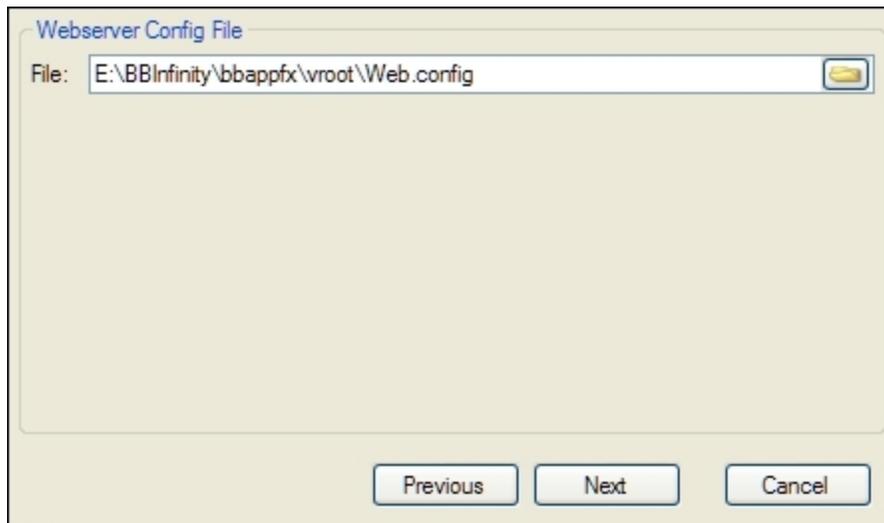
After you install the address validation service, you must set up the web server to use the service.

### ➤ Configure your web server

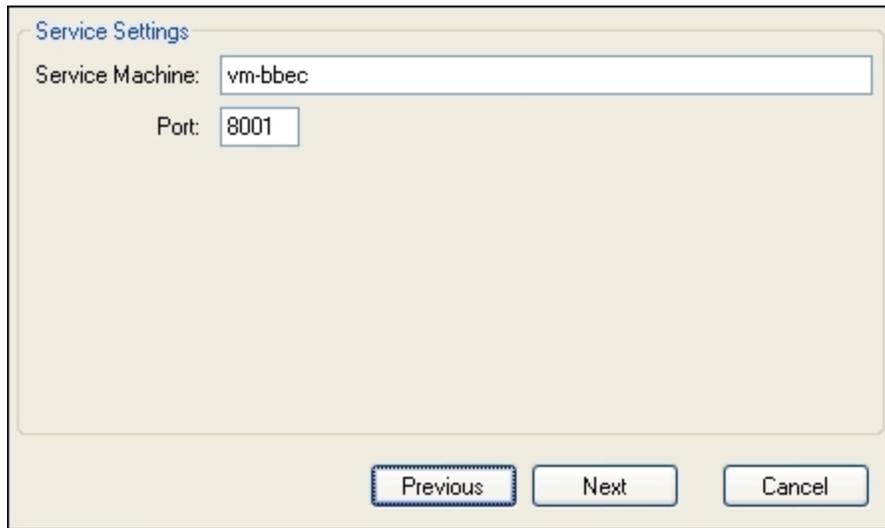
1. On the application start page, click **Utilities**. The Utilities, Gadgets, and Reference page appears.
2. Under **Utilities**, click **Address Validation Service Deployment**. The Address Validation Install utility appears.



3. Under **Installation Type**, select **Set up web server** and click **Next**. The Webserver Config File screen appears.

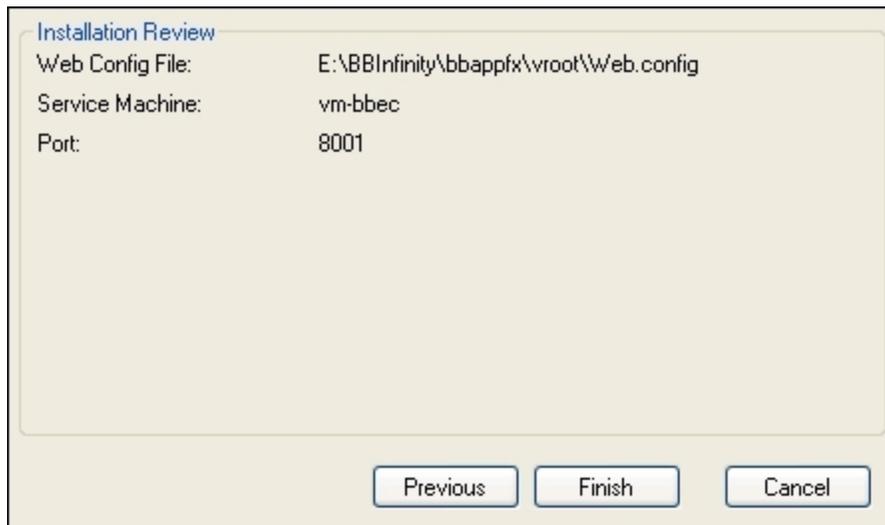


4. Under **Webserver Config File**, browse to the program's web.config file and click **Next**. The Service Settings screen appears.



The image shows a dialog box titled "Service Settings". It contains two input fields: "Service Machine:" with the text "vm-bbec" and "Port:" with the text "8001". At the bottom of the dialog, there are three buttons: "Previous", "Next", and "Cancel". The "Previous" button is highlighted with a blue border.

5. In the **Service Machine** field, enter the name of the web server.
6. In the **Port** field, enter the TCP port entered for the address validation service.
7. Click **Next**. The Installation Review screen appears.



The image shows a dialog box titled "Installation Review". It displays the following information:

Web Config File:	E:\BBInfinity\bbappfx\vroot\Web.config
Service Machine:	vm-bbec
Port:	8001

At the bottom of the dialog, there are three buttons: "Previous", "Finish", and "Cancel".

8. Under **Installation Review**, verify your installation settings are correct. To adjust a setting, click **Previous** to access the applicable screen of the installation utility.
9. Click **Finish**. After the utility successfully sets up the web server, a message appears.
10. Click **OK**. You return to the Utilities, Gadgets, and Reference page.

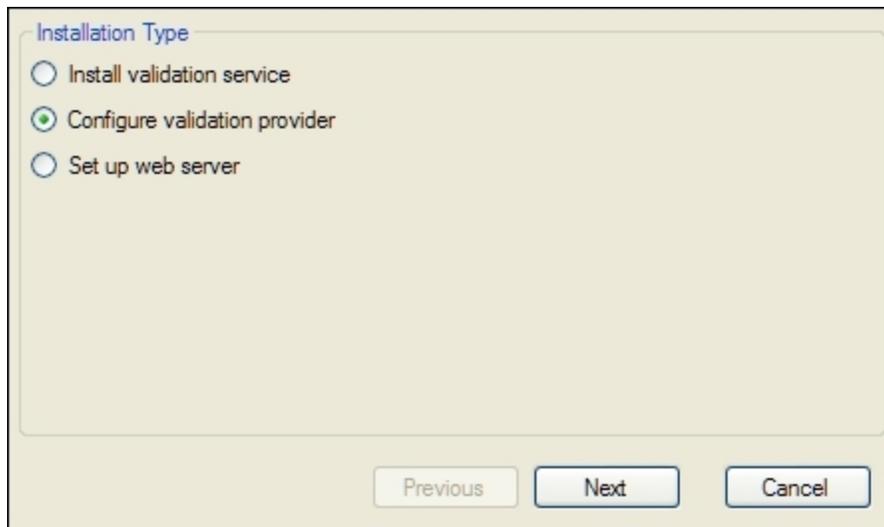
## Configure an Address Validation Provider

If, when you install an address validation service, you select to configure your validation provider at a later time, use this procedure to configure Satori or another validation provider such as a web service.

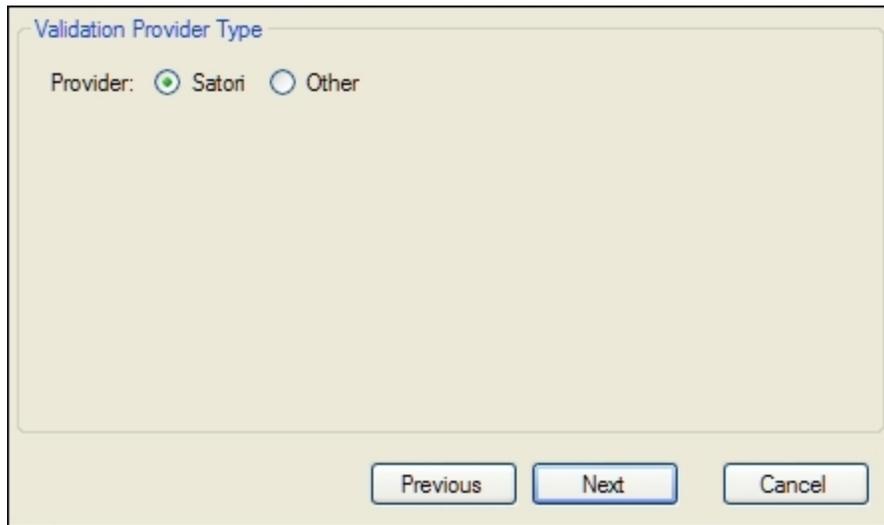
**Note:** To use an address validation provider other than Satori, you must first create a new Class Library project and add a reference to the Blackbaud.AppFx.AddressValidation.Service.exe. Within this project, create a class that implements the four interfaces required for address validation providers: IValidationProvider, IAddressValidation, IAddressBrowser, and IAddressPresort. After you create the class in the project, build and copy the \*.dll file to a location on your address validation server. When you configure the provider, you must map to the \*.dll file.

### ➤ Configure Satori as an address validation provider

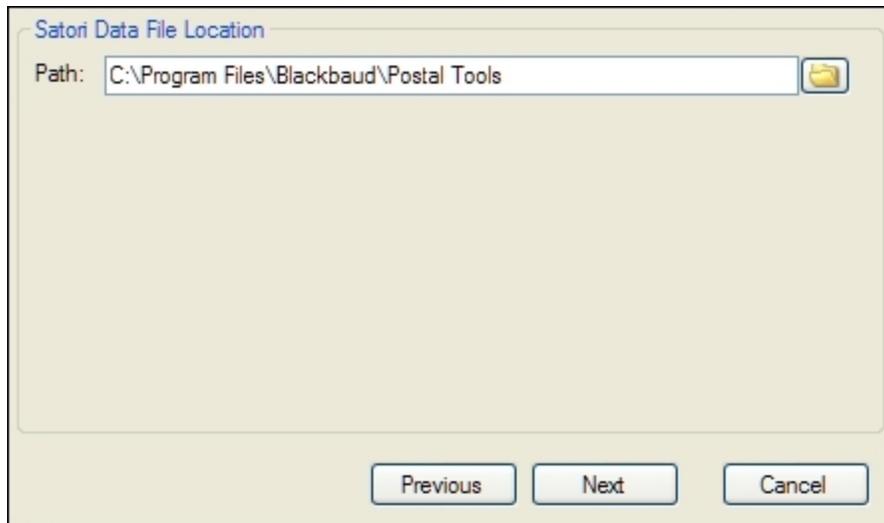
1. On the application start page, click **Utilities**. The Utilities, Gadgets and Reference page appears.
2. Under **ClickOnce Utilities**, click **Address Validation Service Deployment**. The Address Validation Install utility appears.



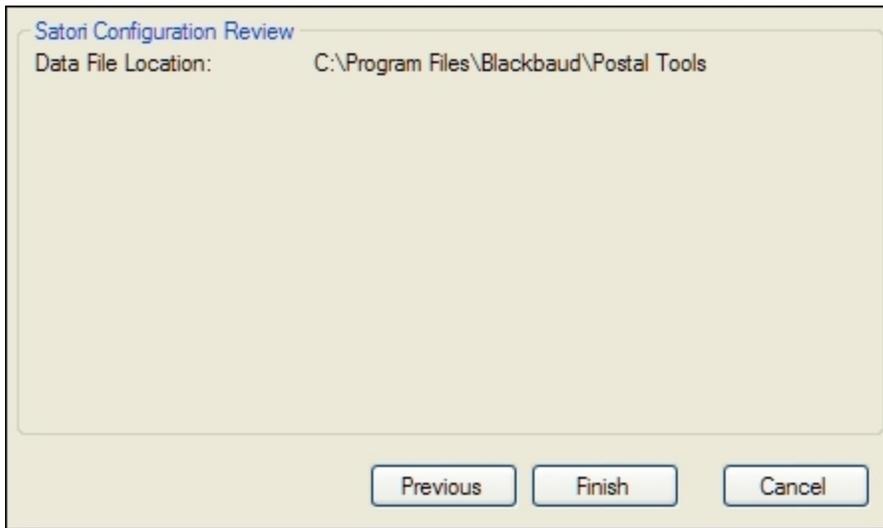
3. Under **Installation Type**, select **Configure validation provider** and click **Next**. The Validation Provider Type screen appears.



4. For **Provider**, select **Satori** and click **Next**. The Satori Data File Location screen appears.



5. Under **Satori Data File Location**, browse to the Postal Tools folder created when you install the validation service.
6. Click **Next**. The Satori Configuration Review screen appears.

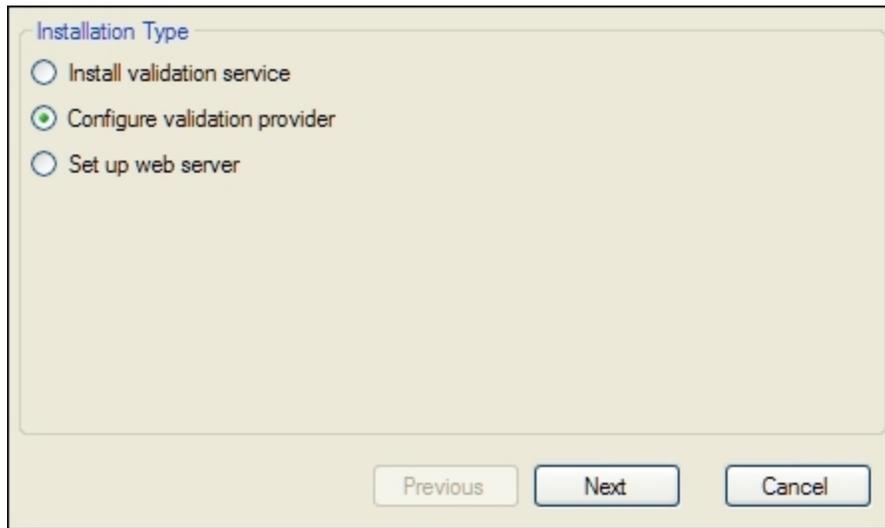


7. Under **Satori Configuration Review**, verify your installation settings are correct. To adjust a setting, click **Previous** to access the applicable screen of the installation utility.
8. Click **Finish**. After the utility successfully sets up the web server, a message appears.
9. Click **OK**. You return to the Utilities, Gadgets and Reference page.

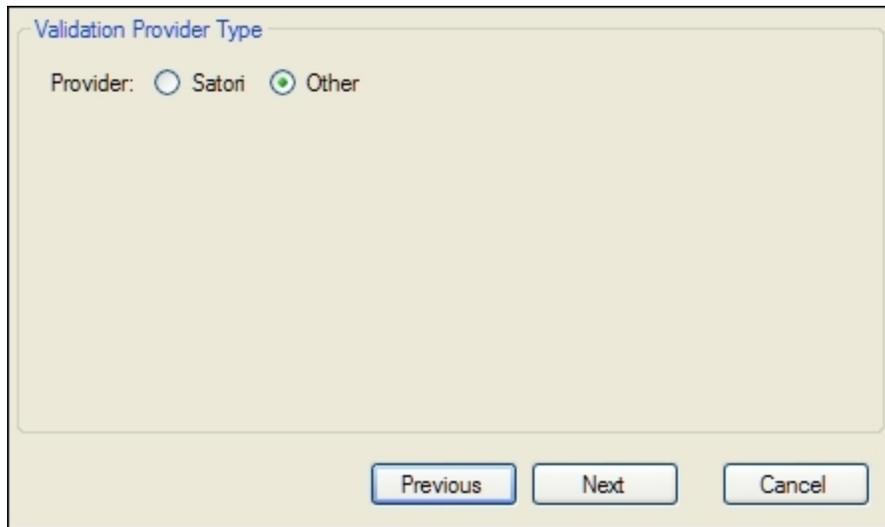
**Warning:** Web server configuration is independent of the validation provider. Unless you remove the validation service, move it to another location, or change connectivity ports, you only need to set up the web server once. For information about how to configure your web server, refer to [Configure the Web Server for Address Validation on page 31](#).

### ➤ Configure an address validation provider other than Satori

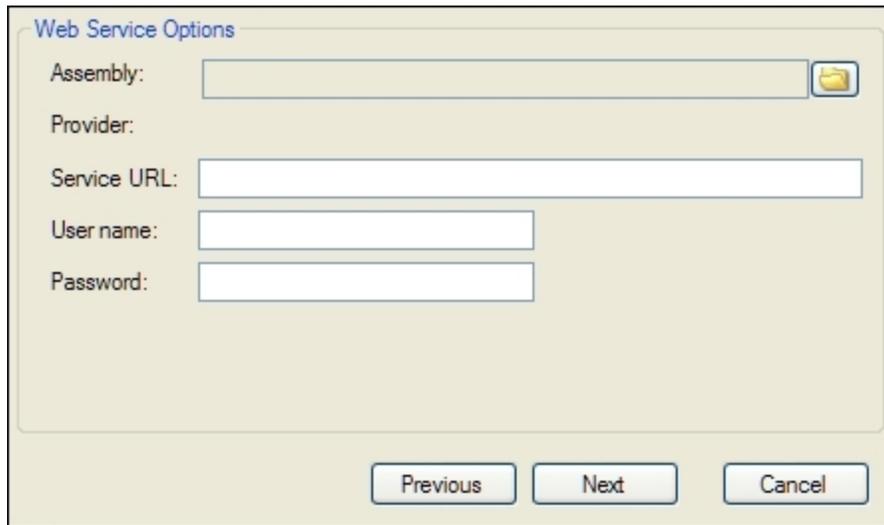
1. On the application start page, click **Utilities**. The Utilities, Gadgets, and Reference page appears.
2. Under **Utilities**, click **Address Validation Service Deployment**. The Address Validation Install utility appears.



3. Under **Installation Type**, select **Configure validation provider** and click **Next**. The Validation Provider Type screen appears.



4. For **Provider**, select **Other** and click **Next**. The Web Service Options screen appears.



5. In the **Assembly** field, browse to the assembly \*.dll file created for the address validation service.
6. If the selected \*.dll file defines a single provider, the **Provider** field displays the defined provider. If the \*.dll file defines multiple providers, select the provider to use.
7. In the **Service URL** field, enter the web address to the address validation service.
8. If the validation provider requires login credentials, enter the user name and password used to access the service.
9. Click **Next**. The Installation Review screen appears.
10. Under **Installation Review**, verify your installation settings are correct. To adjust a setting, click **Previous** to access the applicable screen of the installation utility.
11. Click **Finish**. After the utility successfully sets up the web server, a message appears.
12. Click **OK**. You return to the Utilities, Gadgets, and Reference page.

**Warning:** Web server configuration is independent of the validation provider. Unless you remove the validation service, move it to another location, or change connectivity ports, you only need to set up the web server once. For information about how to configure your web server, refer to [Configure the Web Server for Address Validation on page 31](#).

## Configure Address Validation for a Country

After you install and set up the address validation service, you can configure whether to enable address validation for the countries applicable to the service. You can configure address validation from the Countries and States page in *Administration*. After you install the validation service and set up the web server, the **Address validation information** frame appears when you add or edit a country. Under **Address validation information**, select whether to allow address validation for the country. If you select **Allow address validation**, select the country on which to base validation.

If you enable address validation, users can validate constituent addresses for the country as they add the address to the database. For information about how to validate an address, refer to [Validate an Address for a Constituent on page 43](#).

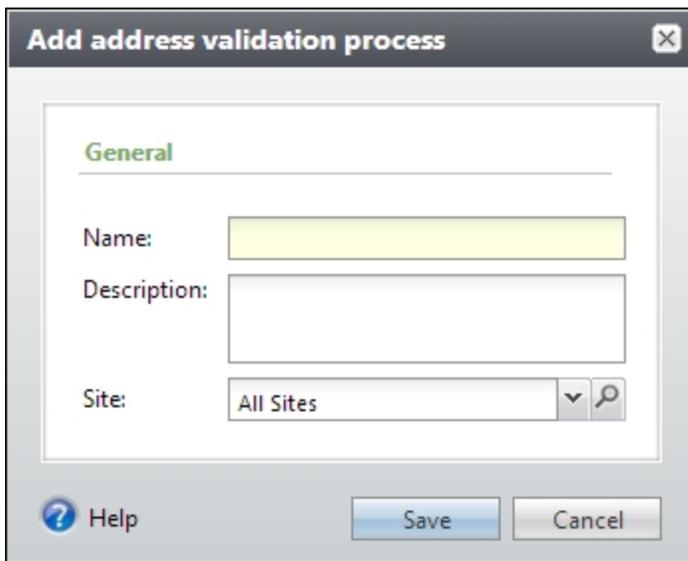
For more information about how to configure country settings, refer to the *Administration Guide*.

## Add an Address Validation Process

With the address validation process, you can use your address validation service to validate multiple addresses at one time. To run an address validation process, you must first create the process.

### ➤ Add an address validation process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the Address Validation tab.
3. Under **Address validation process**, click **Add**. The Add address validation process screen appears.



4. Enter a unique name and description to help identify the process and the information it includes.
5. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process. You can create one process for each site. To not base the process on a specific site, leave this field blank.
6. Click **Save**. The process page appears. For information about the items on the process page, refer to [Address Validation Process Page on page 40](#).

## Edit an Address Validation Process

After you add an address validation process, you can easily edit it as necessary such as to correct a typographical error in its description.

### ➤ Edit an address validation process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the Address Validation tab.
3. Under **Address validation process**, select the process to edit.
4. On the action bar, click **Edit**. The Edit address validation process screen appears. The items on this screen are the same as the Add address validation process screen. For information about the items on this screen, refer to [Add an Address Validation Process on page 39](#).
5. Edit the information as necessary.
6. Click **Save**. You return to the Address validation tab.

## Delete an Address Validation Process

If you no longer need an address validation process, you can remove it from the database.

### ➤ Delete an AddressFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the Address Validation tab.
3. Under **Address validation process**, select the process to delete.
4. On the action bar, click **Delete**. A message appears to ask whether to delete the process.
5. Click **Yes**. You return to the Address validation tab.

## Address Validation Process Page

When you create an address validation process, the program automatically generates a page for the process. On this page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

To access the process page from the Address Validation tab on the Data Tune-Up page, click the name of the process under **Address validation process**.

From the process page, you can walk through the steps run the address validation process. To validate your addresses with the Coding Accuracy Support Standards (CASS) of the United States Postal Service (USPS), you must first create and run a validation process. With the validation process, you select the constituents and addresses to validate.

When you run the validation process, the program generates an address validation batch with information about the addresses that require changes. Before you commit an address validation batch, we recommend you review the update file uploaded from Blackbaud. From the process page, you can also generate a report to view the validation changes.

Depending on your system role and security rights, you can edit or delete the process from its page.

## Edit a Validate Addresses Process

To certify your addresses with the Coding Accuracy Support Standards (CASS) of the United States Postal Service (USPS), you must edit the address validation process to select the constituents and addresses to include in the process.

### ➤ Edit an address validation process

1. On the address validation process page, under **Step 1**, click **Edit** on the action bar. The Edit address validation process screen appears.

**Note:** To edit a process from its status page, click **Edit process** under **Tasks**.

The screenshot shows a dialog box titled "Edit address validation process". It has a standard Windows-style title bar with a close button (X). The main content area is titled "General" and contains three input fields: "Name" with the text "Individual Constituents", "Description" which is empty, and "Site" with a dropdown menu showing "All Sites" and a search icon. At the bottom of the dialog, there is a "Help" button with a question mark icon, and "Save" and "Cancel" buttons.

2. Under **Criteria**, search for and select the selection of constituents to include in the process.
3. Under **Addresses**, select which addresses of the selected constituents to include in the process. You can select to include all active addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include in the **Address type** field.
4. Select whether to include addresses marked as Do Not Mail.
5. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
6. Click **Save**. You return to the process page.

## Start an Address Validation Process

To certify your addresses with the Coding Accuracy Support Standards (CASS) of the United States Postal Service (USPS), you must run an address validation process. When you run an address validation process, you can edit the process to select the constituents and addresses to include.

### ➤ Run an address validation process

1. On the address validation process page, under **Step 1**, click **Start process** on the action bar. The Run address validation process screen appears. The items on this screen are the same as the items on the Edit address validation process screen. For information about the items on this screen, refer to [Edit a Validate Addresses Process on page 41](#).

**Note:** To run a process from its status page, click **Start process** under **Tasks**.

2. Edit the information as necessary.
3. Click **Start**. The program validates the selected address to ensure they meet CASS-certification. The status page for the process appears.

**Note:** For information about the process status page, refer to [Data Tune-Up Process Status Page on page 9](#).

## Address Validation Batch

When you run the validation process, the program generates an address validation batch with information about the addresses that require changes. To update your records with the validation information, you must commit the batch. Before you commit an address validation batch, we recommend you review the update file uploaded from Blackbaud. The batch lists all constituents included in the update file, along with the former address information, new address information, and other information about the update process. When you review the update file, you cannot change the information.

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

To view or edit the batch, under **Step 2**, click **Go to batch** or **Edit batch**. To commit the records in the batch to your database, click **Commit batch**.

## Address Validation Report

After you run the validate addresses process and upload the update file from Blackbaud, you can access the Address Validation Report. This report provides information about the addresses included in the process and indicates which addresses returned validation changes in the update file. To view the report, on the address validation process page, under **Step 2**, click **View report**.

# Validate an Address for a Constituent

With *Data Tune-Up*, you can use the address validation service to verify that addresses you enter exist. When you validate an address, the program automatically standardizes its format, corrects misspelled words, and updates it with missing information such as the Zip code.

## ➤ Search for a valid address for a constituent

1. Next to the address entered for a constituent, such as on the Add address screen or Add an individual screen, click **Validate**. If the address is invalid, such as when it contains incorrect information or provides possible matches, a message appears to ask whether to search for the correct address. If the address is valid, the program automatically updates it accordingly.
2. Click **Yes**. The address validation screen appears.

Address: 200 Daniel Island Dr

City: Charleston

State: SC ZIP:

Search Clear

Results

Select a street: Daniel Island Dr

Primary range	Unit type	Secondary range	ZIP+4	Business name	Address t
1201 - 1299 (odd)			29492-7501		Street
1300 - 1398 (even)			29492-7502		Street
1301 - 1399 (odd)			29492-7503		Street
1900 - 1998 (even)			29492-7546		Street
2000 - 2098 (even)			29492-7540		Street
2000			29492-7541	Blackbaud Inc	Firm
2200 - 2216 (even)			29492-7948		Street
2201 - 2217 (odd)			29492-7502		Street

Validate Cancel

3. Verify the address information entered is correct.
4. Click **Search**. Under **Results**, information about possible addresses that match the criteria entered appear.
5. In the **Select a street** box, the possible street names that match the criteria appear. If the results return multiple street names, select the street name you think is correct.
6. In the **Address ranges for selected** grid, the address ranges for the selected street name appear. Determine the correct street address for the constituent and update the **Address** field as necessary.
7. Click **Validate**. If the address is valid, you return to the previous screen. The program standardizes the address and updates it with any missing information.

# DeceasedRecordFinder Process

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*DeceasedRecordFinder* helps you keep track of deceased constituents in your database. The process scans all constituents in a submitted data file to identify deceased constituents, based on the names and addresses in the file. To view and manage the *DeceasedRecordFinder* process for your organization, select the DeceasedRecordFinder tab.

Once you activate your subscription, you can start to use Data Tune-Up to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to [DeceasedRecordFinder Process Page on page 47](#).

# Manage Global Rules and Options for Deceased Constituents

Before you run the *DeceasedRecordFinder* process, you should verify your organization's global rules and options for deceased constituents. These settings determine what constituent information is automatically updated when the process marks a constituent as deceased. For example, the program can automatically mark a deceased constituent as inactive so they do not appear in searches. You can also configure the program to display a Deceasing Options page so you can update a constituent's relationships, constituencies, and other information after the constituent is marked as deceased.

To view or make changes to these settings, from *Constituents*, select **Life changes** under **Configuration**. The Manage Life Changes page appears.

- Under **Global rules for deceased constituents**, you can view which settings are set to automatically apply when a constituent is marked as deceased. To make changes, select **Edit**. Choose which options to automatically apply when a constituent is marked as deceased, then **Save**. For more information about items on this screen, see [Edit Global Rules for Deceased Constituents Screen](#).
- Under **Options for deceased constituents**, you can view which information is set to display on the Deceasing Options page that appears when a constituent is marked as deceased. Information on this page must be updated manually. To make changes, select **Edit**. Choose which information appears on the Deceasing Options page, then **Save**. For more information about items on this screen, see [Edit Options for Deceased Constituents Screen](#).

## Add a DeceasedRecordFinder Process

To run *DeceasedRecordFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *DeceasedRecordFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

## Add a DeceasedRecordFinder Process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the DeceasedRecordFinder tab.
3. Under **DeceasedRecordFinder process**, click **Add**. The Add DeceasedRecordFinder process screen appears.

4. Enter a unique name and description to help identify the process and the information it includes.
5. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process. You can create one process for each site. To not base the process on a specific site, leave this field blank.
6. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted constituent information and inform when updates are available.

**Note:** For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

7. Click **Save**. The program automatically creates the process and displays its process page. For information about the items on the process page, refer to [DeceasedRecordFinder Process Page on page 47](#).

## Edit a DeceasedRecordFinder Process

After you create a *DeceasedRecordFinder* process, you can edit it as necessary such as to update contact information.

### ► Edit a DeceasedRecordFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the DeceasedRecordFinder tab.
3. Under **DeceasedRecordFinder process**, select the process and click **Edit**. The Edit DeceasedRecordFinder process screen appears. The items on this screen are the same as the Add DeceasedRecordFinder process screen. For information about the items on this screen, refer to [Add a DeceasedRecordFinder Process on page 45](#).
4. Edit the information as necessary.
5. Click **Save**. You return to the Data Tune-Up page.

## Delete a DeceasedRecordFinder Process

If your organization no longer uses a *DeceasedRecordFinder* process, you can remove it from the database. You can delete a *DeceasedRecordFinder* process from the DeceasedRecordFinder tab or its process page. On the DeceasedRecordFinder tab, under **DeceasedRecordFinder process**, select the process to delete and click **Delete**. From the process page, click **Delete process** under **Tasks**.

## DeceasedRecordFinder Process Page

When you create a *DeceasedRecordFinder* process, the program automatically generates a page for the process. To access the process page from the DeceasedRecordFinder tab on the Data Tune-Up page, click the name of the process under **DeceasedRecordFinder process**.

At the top of the process page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

From the process page, you can walk through the steps to run *DeceasedRecordFinder*:

- Step 1: Create the file of the constituents and addresses to check for deceased constituents.
- Step 2: Submit the data file to Blackbaud.
- Step 3: After Blackbaud updates the deceased information in the submitted data file, you can run the retrieval process to transfer the updated file from Blackbaud to a batch in your database.

**Note:** For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

- Step 4: Commit the batch to update your records with the deceased constituents information. After committing the batch, you can view a list of records included in the batch with information about when they were marked deceased.

**Note:** To run *DeceasedRecordFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *DeceasedRecordFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

Depending on your system role and security rights, you can also manage the *DeceasedRecordFinder* process from its page.

## Edit the Criteria for Constituents Included in a DeceasedRecordFinder File

When you create a *DeceasedRecordFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify deceased constituents. To include only a select group of constituents in the process or base the identification process on an address other than the primary address, you must edit the submit process.

### > Edit the criteria for constituents included in a DeceasedRecordFinder file

1. Access the process page of the *DeceasedRecordFinder* process for which to submit a file. For information about the process page, refer to [DeceasedRecordFinder Process Page on page 47](#).
2. Under **Step 1**, click **Edit**. The Edit DeceasedRecordFinder create process screen appears.

3. Under **Criteria**, choose the selection of constituents of constituents to include in the process.
4. Under **Addresses**, select which addresses to include in the process—active addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include in the **Address type** field.
5. Select whether to include addresses marked as Do Not Mail.
6. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
7. Click **Save**. You return to the process page.

## Create a DeceasedRecordFinder Process

To update your constituents with deceased status changes, you must run a *DeceasedRecordFinder* submit process. When you run the submit process, you can edit the constituents and addresses included in the process before you submit the data to Blackbaud.

**Note:** To run *DeceasedRecordFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *DeceasedRecordFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

**Tip:** Before you create an *DeceasedRecordFinder* file, you may want to check your Data tune-up settings. For more information, see [Edit Data Tune-Up Settings on page 7](#).

### ➤ Create a *DeceasedRecordFinder* file

1. Access the process page of the *DeceasedRecordFinder* process for which to submit a file. For information about the process page, refer to [DeceasedRecordFinder Process Page on page 47](#).
2. Under **Step 1: Create File**, click **Start process** to create the data file. After the file processes, **Step 1** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

**Note:** To run *DeceasedRecordFinder*, you must make sure your organization has purchased the appropriate level of service to process the number of records you submit. By submitting the file to Blackbaud, you acknowledge and reaffirm your contractual agreement regarding *DeceasedRecordFinder* record processing. Additional charges may apply. Contact Blackbaud Support if you have any questions.

3. Under **Step 2**, click **Start process**. The Run *DeceasedRecordFinder* submit process screen appears. The items on this screen are the same as the Edit *DeceasedRecordFinder* submit process screen. For information about the items on this screen, refer to [Edit the Criteria for Constituents Included in a \*DeceasedRecordFinder\* File on page 48](#).
4. Edit the information as necessary.
5. Click **Start**. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. The status page for the change of address submit process appears.
6. For information about the process status page, refer to [Data Tune-Up Process Status Page on page 9](#).

## Submit the *DeceasedRecordFinder* File

After you create the *DeceasedRecordFinder* data file, you must run the submit process. This process sends the file to Blackbaud to find deceased constituents.

### ➤ Submit a *DeceasedRecordFinder* data file to Blackbaud

1. Access the status page of the *DeceasedRecordFinder* process for which to submit a file. For information about the status page, refer to [DeceasedRecordFinder Process Page on page 47](#).
2. Under **Step 2: Submit file to Blackbaud**, click **Start process**. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. After the submission processes, **Step 2** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

## Check the Availability of a DeceasedRecordFinder File

You can check the availability of a pending update file at any time. On the process page, click **Check file availability** under **Step 3: Get file from Blackbaud**. This will enable the rest of the options under **Step 3** so you can retrieve the file. For information about how to retrieve the file, refer to [Start the DeceasedRecordFinder Retrieval Process on page 51](#).

## Start the DeceasedRecordFinder Retrieval Process

The retrieval process transfers the updated file from Blackbaud to a batch in your database. To run the retrieval process, click **Start process** under **Step 3: Get file from Blackbaud**. After the file processes, **Step 3** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

## DeceasedRecordFinder Batch

When you retrieve the updated file from Blackbaud, the program generates a *DeceasedRecordFinder* batch with the deceased status information included in the file. To update your records with the information, you must commit the batch. Before you commit, we recommend you review the possible changes. The batch lists all constituents included in the update file, along with their lookup IDs, submitted address information, deceased dates, and the method by which the information was confirmed. When you review the update file, you can edit the information as necessary.

To review and/or edit the batch, under **Step 4: Update Addresses**, click **Edit Batch**. Once you have confirmed the changes, click **Commit batch** to commit the records in the batch to your database. After the batch committal processes, **Step 4** displays the number of records processed, the number of exceptions, and total number of records that were successfully updated.

After you commit the batch, you can click **Review deceased** to view a list of all records included in the batch. The Confirmation column displays \*\*\* and the Reviewed column displays\*\*\*

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

## Review Information About Deceased Constituents

In *Administration*, your system administrator can configure the Manage Life Changes settings to allow users to update information about constituents. If your administrator enables these options for deceased constituents, **Review deceased** appears under **Step 4** on the *DeceasedRecordFinder* process page. For information about how to configure the life changes settings, refer to the *Constituents Guide*.

After you commit a *DeceasedRecordFinder* batch, you can access the Deceasing Options pages for constituents included in the process, such as to view or edit information.

# EmailFinder Process

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*EmailFinder* helps you locate email addresses for constituents in your database and helps track changes to email addresses. The process scans all constituents in a submitted data file and compares them to data sources such as *Harris Connect* to identify email addresses for the constituents based on the names and addresses in the file. *EmailFinder* process typically matches 8-20% of submitted constituent records to new or updated email addresses. After the process identifies a new or updated email address, it sends an email message to the constituent to verify the constituent wants to receive email from your organization at the address. To view and manage the *EmailFinder* process for your organization, select the EmailFinder tab.

Once you activate your subscription, you can use Data Tune-Up to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to [EmailFinder Process Page on page 54](#).

## Add an EmailFinder Process

To run *EmailFinder*, you must first create the process and provide information about who Blackbaud should contact when updates are available. When the process is complete, the *EmailFinder* utility will notify the contact by email. You must also configure the email that constituents with email addresses located during the process receive to determine whether they want to receive email from your organization at the address.

### ➤ Add an EmailFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the EmailFinder tab.
3. Under **EmailFinder process**, click **Add**. The Add an EmailFinder process screen appears.
4. On the General tab, enter a unique name and description to help identify the process.
5. To restrict use of the process to only a specific site at your organization, in the **Site** field, select the site to use the process. You can create one *EmailFinder* process for each site. To not base the process on a specific site, leave this field blank.
6. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted constituent information and inform when updates are available.
7. After *EmailFinder* identifies a new or updated email address, it sends an email message to the constituent to verify whether to send email from your organization to the address. This message allows recipients to opt out of future email from your organization at the address. Configure the email message that the process sends to constituents.

The program uses the items entered on the Opt Out Email tab and Opt Out Email Message tab to create the email message used to verify whether recipients opt to receive email from your organization at addresses returned by the process. To ensure a cohesive email message, we recommend you complete all fields on these tabs.

8. Select the Opt Out Email tab.
9. In the **Subject** field, enter the text to appear in the subject line of the email message, such as "Email address confirmation."
10. In the **Reply to** field, enter the email address to receive replies to the opt out email message.
11. Select the Opt Out Email Message tab.
12. Under **Information**, enter details about your organization such as contact and website information and mission statement. Under **Email**, the process uses this information to automatically customize its standard email message to meet the needs of your organization
13. Click **Save**. The process page appears. For detailed instruction about working on this page, refer to [EmailFinder Process Page on page 54](#).

## Edit an EmailFinder Process

After you create an *EmailFinder* process, you can edit it as necessary such as to update contact information.

### ➤ Edit an EmailFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.

**Note:** To edit an *EmailFinder* process from its process page, click **Edit process** under **Tasks**.

2. Under **EmailFinder process**, select the process to edit.

3. On the action bar, click **Edit**. The Edit EmailFinder process screen appears. The items on this screen are the same as the Add an EmailFinder process screen.
4. Edit the information as necessary.
5. Click **Save**. The process page appears. For detailed instruction about working on this page, refer to [EmailFinder Process Page on page 54](#).

## Delete an EmailFinder Process

If your organization no longer uses an *EmailFinder* process, you can remove it from the database. You can delete an *EmailFinder* process from the EmailFinder tab or its process page. On the EmailFinder tab, under **EmailFinder process**, select the process to delete and click **Delete** on the action bar. From the process page, click **Delete process** under **Tasks**. When a message appears to ask whether to delete the process, click **Yes**.

## EmailFinder Process Page

When you create an *EmailFinder* process, the program automatically generates a page for the process. On this page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

To access the process page from the EmailFinder tab on the Data Tune-Up page, click the name of the process under **EmailFinder process**.

From the process page, you can walk through the steps to run the *EmailFinder* process. To identify new and updated email addresses for constituents in your database, you must first create and run an email submit process. With the submit process, you select the constituents and addresses to check for email addresses and send the data file to Blackbaud.

After Blackbaud updates the email address information in the submitted data file, the primary or secondary contact at your organization receives a notification that the file is ready for retrieval. To upload the update file from Blackbaud, you must run the *EmailFinder* retrieval process.

When you upload the update file from Blackbaud, the program generates an *EmailFinder* batch with the information included in the file. To update your records with the email address information, you must commit the batch. You should also select the email type and information source to apply to email addresses the process returns.

Depending on your system role and security rights, you can also manage the *EmailFinder* process from its page.

## Start an EmailFinder Submit Process

After you edit the *EmailFinder* submit process and select the constituents and addresses to include in the data file, you must run the submit process to send the data file to Blackbaud. When Blackbaud receives the data file, it scans all constituents in the data file and compares them to data sources such as *Harris Connect* to identify new and updated email address information. It also sends an opt out email message

to the email addresses it identifies to verify each recipient wants to receive email from your organization at the address.

You submit the data file from the *EmailFinder* process page. Under **Step 1**, click **Start process**. The program automatically sends the data file to Blackbaud and displays the progress of the submit process on the status page.

For information about the process status page, refer to [Data Tune-Up Process Status Page on page 9](#).

## Edit an EmailFinder Submit Process

To update your constituents with new and updated email address information, you must run an *EmailFinder* submit process. Before you run the submit process, you must select the constituents and addresses to include in the process.

### ➤ Select the constituents and addresses to include in an EmailFinder process

1. Access the process page of the *EmailFinder* process for which to submit a file.
2. Under **Step 1**, click **Edit** on the action bar. The Edit EmailFinder submit process screen appears.

**Edit EmailFinder submit process**

**Select constituents**

All constituents

Selected constituents:   

**Address types**

Send primary address only

Send all addresses

Specific address type:  

Include incomplete addresses

**Special instructions**

For households, submit shared addresses once along with primary contact name

Include inactive constituents

**Results**

Create selection from results

Selection name:

Overwrite existing selection

 Help

3. Under **Select constituents**, select whether to include all constituents or only selected constituents in the process. If you select **Selected constituents**, search for and select the selection of constituents to include.
4. Under **Address types**, select which addresses of the selected constituents to include in the process. You can select to include all addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include.
5. Select whether to include incomplete addresses in the process.
6. Under **Special instructions**, select whether to submit shared addresses only once for households included in the process and whether to include inactive constituents.
7. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
8. Click **Save**. You return to the process page.

## Check the Availability of an EmailFinder Retrieval File

When the *EmailFinder* retrieval file is ready with new and updated email address information, the contacts entered for the process receive a notification. You can also check the availability of a pending update file at any time. On the *EmailFinder* process page, click **Check file availability** under **Tasks**. If the update file is available for upload, the **Step 2** frame on the process page is enabled so you can retrieve the file. For information about how to retrieve the file, refer to [Start the EmailFinder Retrieval Process on page 56](#).

## Start the EmailFinder Retrieval Process

Once Blackbaud updates the email address information in the submitted data file, the primary contact in the submission record is contacted and told the file is ready to be uploaded. If for some reason Blackbaud cannot reach the primary contact, the secondary contact is notified. After the contact receives this notification, you can run the retrieval process to get the update file from Blackbaud.

**Tip:** You can check the availability of the update file from the EmailFinder process page. To check the availability, click **Check file availability** under **Tasks**.

You can retrieve the update file from Blackbaud from the status page of the *EmailFinder* process. Under **Step 2**, click **Start process** on the action bar. The program automatically uploads the update file and displays the status page of the retrieval process.

For information about the items on the status page, refer to [Data Tune-Up Process Status Page on page 9](#).

**Note:** To run the retrieval process again from its status page, click **Start process** under **Tasks**.

## EmailFinder Report

After you run the retrieval process and upload the update file from Blackbaud, you can access the EmailFinder Report. This report provides information about the constituents included in the process and indicates which constituents returned email address information in the update file. To view the EmailFinder Report, on the process status page, click **View report** of the **Step 2** frame.

## EmailFinder Batch

When you upload the update file from Blackbaud, the program generates an *EmailFinder* batch with the email address information included in the file. To update your records with the information, you must commit the batch. Before you commit an *EmailFinder* batch, we recommend you review the update file uploaded from Blackbaud. The batch lists all constituents included in the update file, along with the new and updated email address information. When you review the update file, you can edit the information as necessary.

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

To view or edit the batch, under **Step 3**, click **Go to batch** or **Edit batch**. To commit the records in the batch to your database, click **Commit batch**.

## Edit EmailFinder Process Options

Before you commit an *EmailFinder* batch, you should specify the email type and source to assign addresses that the process returns. When you commit an *EmailFinder* batch, the program updates the constituent records with the new or updated email address and the selected email type and source.

- If the process returns an email address for a constituent and the constituent does not opt out of email messages from your organization at the address, the program updates the constituent record with the new address.
- If the email address already appears on the constituent record but not its type or source, the program automatically updates the record with the selected email type and information source.
- If the constituent opts out of email from your organization and email address appears on the constituent record, the program marks the address as Do not email and updates the record with the selected email type and information source.
- If the constituent opts out of email from your organization and the email address does not exist in the database, the email address is not added to the database and email is not sent to the constituent.

### ➤ Edit the email type and source for addresses in an EmailFinder process

1. Access the process page of the *EmailFinder* process for which to edit options.
2. Under **Step 3**, click **Edit** and select **Process options** on the action bar. The Edit EmailFinder process options screen appears.
3. Under **Email options**, select the email type to assign email addresses that the process returns.

4. Select whether to set email addresses that the process returns as the primary email address for constituents.
5. Under **Email source**, select the source for the email address information, such as EmailFinder, and enter any comments to include for email addresses that the process returns.
6. Click **Save**. You return to the process page.

# PeopleFinder Process

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*PeopleFinder* helps you locate constituents you may have lost contact with. This process searches over 1,700 databases, such as records from credit agencies, utilities, and court records, to locate people who match information from your constituent records. The process then generates a ranked list of the candidates who most likely match your constituents. For information about the information used and how the process ranks its results, refer to [PeopleFinder Match Confidence Criteria on page 61](#).

To view and manage the *PeopleFinder* process for your organization, select the PeopleFinder tab.

Once you activate your subscription, you can start to use Data Tune-Up to submit information for updates. You can create and submit to Blackbaud files that contain the constituents to locate, and you can import and update your records with the new information. The updated information can include changes in addresses, phone numbers, last names, and deceased status. You can configure how the process handles this information when it updates the records in your database. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to [PeopleFinder Process Page on page 62](#).

## Add a PeopleFinder Process

To run *PeopleFinder*, you must first create the process and provide information about who Blackbaud should contact when updates are available. When the process is complete, the *PeopleFinder* utility will notify the contact by email.

### ➤ Add a PeopleFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the PeopleFinder tab.
3. Under **PeopleFinder process**, click **Add**. The Add a PeopleFinder process screen appears.

**Add a PeopleFinder process**

**General**

Name:

Description:

Site:

**When process completes, Blackbaud will notify**

Primary contact:

Name:

Email address:

Phone number:

Alternate contact:

Name:

Email address:

Phone number:

4. Under **General**, enter a unique name and description to help identify the process.
5. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process.
6. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted constituent information and inform when updates are available.

7. Click **Save**. The process page appears. For detailed instruction about working on this page, refer to [PeopleFinder Process on page 59](#).

## Edit a PeopleFinder Process

After you create a *PeopleFinder* process, you can edit it as necessary such as to update contact information.

### ► Edit a PeopleFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the PeopleFinder tab.
3. Under **PeopleFinder process**, select the process to edit.
4. On the action bar, click **Edit**. The Edit a PeopleFinder process screen appears. The items on this screen are the same as the Add a PeopleFinder process.
5. Edit the information as necessary.
6. Click **Save**. You return to the PeopleFinder tab.

## Delete a PeopleFinder Process

If your organization no longer uses a *PeopleFinder* process, you can remove it from the database. You can delete a *PeopleFinder* process from the PeopleFinder tab or its process page.

On the PeopleFinder tab, under **PeopleFinder process**, select the process to delete and click **Delete**.

From the process page, click **Delete process** under **Tasks**. When a message appears to ask whether to delete the process, click **Yes**.

## PeopleFinder Match Confidence Criteria

*PeopleFinder* searches over 1,700 databases, such as records from credit agencies, utilities, and court records, to locate people who match information from your constituent records. When the process searches for people who match your constituents, it uses various pieces data from your constituent records, including Social Security number, middle name, birth date, and address history. The process then generates a ranked list of the candidates who most likely match your constituents. The process ranks the candidates in order of match confidence, based on the number of exact and approximate matches to your constituent information.

Match confidence	Description
<b>A – Solid match</b>	Two or more pieces of data match between the person and your constituent, and the last known address of the constituent matches an address for the person exactly.

Match confidence	Description
<b>B – Strong candidate</b>	Two or more pieces of data match between the person and your constituent, and the age of both, based on birth date or calculated from class year, approximately match.
<b>C – Reasonable match</b>	Two or more pieces of data match between the person and your constituent, or the age of both, based on birth date or calculated from class year, match exactly.
<b>D – Possible match</b>	Only one piece of information matches between the person and your constituent.

Before you commit a people finder batch, we recommend you review the results to determine the information and candidates to use to update your constituent records. Typically, you can commit a solid match or strong candidate without further confirmation. We recommend you verify a reasonable or possible match to ensure it is the correct information for your constituent. You can set the process options to include only candidates of specific match confidence. For information about how to set the options for the process, refer to [Edit PeopleFinder Process Options on page 64](#).

## PeopleFinder Process Page

When you create a *PeopleFinder* process, the program automatically generates a page for the process. On this page, you can view information about the process, such as when it was last run, the constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

To access the process page from the PeopleFinder tab on the Data Tune-Up page, click the name of the process under **PeopleFinder process**.

From the process page, you can walk through the steps to run the *PeopleFinder* process. To search for people who match the constituent information in your database, you must first create and run a submit process. With the submit process, you select the constituents and addresses to include in the search and send the data file to Blackbaud.

After Blackbaud updates the constituent information in the submitted data file, the primary or secondary contact at your organization receives a notification that the file is ready for retrieval. To upload the update file from Blackbaud, you must run the retrieval process.

When you upload the update file from Blackbaud, the program generates a *PeopleFinder* batch with the information included in the file. The batch contains a ranked list of people who match the constituents included in the update file, along with updated contact information.

To update your records with the constituent information, you must commit the batch. Before you commit the batch, we recommend you review the update file uploaded from Blackbaud. You should also select which match confidence ranking to commit to the database and how to handle changes to last names, phone numbers, or deceased status.

Depending on your system role and security rights, you can also manage the *PeopleFinder* process from its page.

## Start a PeopleFinder Submit Process

After you edit the *PeopleFinder* submit process and select the constituents and addresses to include in the data file, you must run the submit process to send the data file to Blackbaud. When Blackbaud receives the data file, it scans all constituents in the data file and searches over 1,700 databases, such as records from credit agencies, utilities, and court records, to locate people who match information from your constituent records.

You submit the data file from the *PeopleFinder* process page. Under **Step 1**, click **Start process**. The program automatically sends the data file to Blackbaud and displays the progress of the submit process on the status page.

For information about the process status page, refer to [Data Tune-Up Process Status Page on page 9](#).

## Edit a PeopleFinder Submit Process

To locate constituents you may have lost contact with and provide new and updated information, you must run a *PeopleFinder* submit process. Before you run the submit process, you must select the constituents and addresses to include in the process.

## Check the Availability of a PeopleFinder Retrieval File

You can check the availability of a pending update file at any time. On the *PeopleFinder* process page, click **Check file availability** under **Tasks**. If the update file is available for upload, the **Step 2** frame on the process page is enabled so you can retrieve the file. For information about how to retrieve the file, refer to [Start a PeopleFinder Retrieval Process on page 63](#).

## Start a PeopleFinder Retrieval Process

Once Blackbaud updates the constituent information in the submitted data file, the primary contact in the submission record is contacted and told the file is ready to be uploaded. If for some reason Blackbaud cannot reach the primary contact, the secondary contact is notified. After the contact receives this notification, you can run the retrieval process to get the update file from Blackbaud.

**Tip:** You can check the availability of the update file from the process page. To check the availability, click **Check file availability** under **Tasks**.

You can retrieve the update file from Blackbaud from the process page of the *PeopleFinder* process. Under **Step 2**, click **Start process** on the action bar. The program automatically uploads the update file and displays the status page of the retrieval process.

For information about the items on the status page, refer to [Data Tune-Up Process Status Page on page 9](#).

**Note:** To run the retrieval process again from its status page, click **Start process** under **Tasks**.

## PeopleFinder Report

After you run the retrieval process and upload the update file from Blackbaud, you can access the PeopleFinder Report. This report provides information about the constituents included in the process and indicates which constituents returned last name, phone number, or deceased status information in the update file. To view the PeopleFinder Report, on the process status page, click **View report** under **Step 2**.

## PeopleFinder Batch

When you upload the update file from Blackbaud, the program generates a *PeopleFinder* batch with the constituent update information included in the file. To update your records with the information, you must commit the batch. Before you commit a *PeopleFinder* batch, we recommend you review the update file uploaded from Blackbaud. The batch lists all constituents included in the update file, along with the new and updated information. When you review the batch, you can delete rows as necessary to select the specific information to use to update constituent records.

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

To view or edit the batch, under **Step 3**, click **Go to batch** or **Edit batch**. To commit the records in the batch to your database, click **Commit batch**.

**Note:** When *PeopleFinder* updates an address for a constituent, the old address is given an address type of "PeopleFinder former."

## Edit PeopleFinder Process Options

Before you commit a *PeopleFinder* batch, you should select the acceptable match confidence criteria of the records to import and select how to handle the updated deceased status, phone numbers, or name changes of these records. When you commit a *PeopleFinder* batch, the program updates the constituent records with any new addresses and updates any name, phone number, or deceased status in accordance with the set process options.

### ➤ Edit the options for a PeopleFinder process

1. Access the process page of the *PeopleFinder* process for which to edit options.
2. Under **Step 3**, click **Edit** on the action bar and select **Process options**. The Edit PeopleFinder process options screen appears.
3. Under **Match confidence**, select the minimum match confidence criteria of the records to import from the process results.

**Tip:** Typically, you can commit a solid match or strong candidate without further confirmation. We recommend you verify a reasonable or possible match to ensure it is the correct information for your constituent.

4. Under **Name, phone, and deceased information**, select how to handle updated last names, phone numbers, and deceased statuses.

**Warning:** The process may return another last name associated with a constituent, but not necessarily the last name currently used by the constituent. For example, the process may return a maiden name or a misspelled version of the last name.

5. Select whether to import any changes to last names returned by the process. If you select to import the name change, select whether to update the last names on the constituents' records with the returned name or add the returned last names as aliases for the constituents. If you select **Replace the last name currently on the constituent record with the returned last name**, select whether to add the last name currently on the record as an alias.
6. Select whether to import any new phone numbers returned by the process. If you select **Add new phone number from PeopleFinder**, select the phone type and information source, such as PeopleFinder, to assign the new phone numbers.
7. Select whether to import new addresses returned by the process. If you select **Add new address from PeopleFinder**, select the address type and information source for the address. You can also select the address type for the former primary address, as well as setting the new address from the process as the primary one.
8. Select whether to import any changes to deceased statuses returned by the process. If you select to import this information, the program follows the Life Changes rules configured in *Constituents*.
9. Click **Save**. You return to the process page.

# PhoneFinder Process

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*PhoneFinder* helps you locate telephone numbers for constituents in your database and helps track changes to phone numbers. When you submit constituent information for the *PhoneFinder* process, the process performs several searches and verifications to provide accurate, up-to-date phone numbers for your constituent records.

- The process searches several databases to retrieve up-to-date phone number information for the submitted constituents.
- The process compares the phone numbers for the submitted constituents against the national Do-Not-Call registry. If the process returns a number that appears on the Do-Not-Call registry, it automatically marks the number as **Do not call this phone number** on the constituent's record when you commit the *PhoneFinder* batch.
- The process verifies the status of the submitted and returned phone numbers to determine whether each is connected or disconnected, and listed or delisted. A "delisted" phone number is one that is either unlisted or not currently in service.

To view and manage the *PhoneFinder* process for your organization, select the PhoneFinder tab.

After you activate your subscription, you can start to use Data Tune-Up to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to [PhoneFinder Process Page on page 69](#).

## Add a PhoneFinder Process

To run *PhoneFinder*, you must first create the process and provide information about who Blackbaud should contact when updates are available. When the process is complete, the *PhoneFinder* utility will notify the contact by email.

### ➤ Add a PhoneFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the PhoneFinder tab.
3. Under **PhoneFinder process**, click **Add**. The Add a PhoneFinder process screen appears.

**Add a PhoneFinder process**

**General**

Name:

Description:

Site:

**When the process completes, Blackbaud will notify**

**Primary contact:**

Name:

Email address:

Phone number:

**Alternate contact:**

Name:

Email address:

Phone number:

4. Under **General**, enter a unique name and description to help identify the process.
5. To restrict use of the process to a specific site at your organization, in the **Site** field, select the site to use the process.
6. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted constituent information and inform when updates are available.
7. Click **Save**. The process page appears. For detailed instruction about working on this page, refer to [PhoneFinder Process Page on page 69](#)

## Edit a PhoneFinder Process

After you create a *PhoneFinder* process, you can edit it as necessary such as to update contact information.

### ➤ Edit a PhoneFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the PhoneFinder tab.
3. Under **PhoneFinder process**, select the process to edit.
4. On the action bar, click **Edit**. The Edit a PhoneFinder process screen appears. The items on this screen are the same as the Add a PhoneFinder process screen.
5. Edit the information as necessary.
6. Click **Save**. You return to the Data Tune-Up page. For detailed instruction about processing a PhoneFinder process, refer to [PhoneFinder Process Page on page 69](#)

## Delete a PhoneFinder Process

If your organization no longer uses a *PhoneFinder* process, you can remove it from the database. You can delete a *PhoneFinder* process from the PhoneFinder tab or its process page.

On the PhoneFinder tab, under **PhoneFinder process**, select the process to delete and click **Delete**.

From the process page, click **Delete process** under **Tasks**. When a message appears to ask whether to delete the process, click **Yes**.

## PhoneFinder Process Page

When you create a *PhoneFinder* process, the program automatically generates a page for the process. On this page, you can view information about the process, such as when it was last run, the constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

To access the process page from the PhoneFinder tab on the Data Tune-Up page, click the name of the process under **PhoneFinder process**.

From the process page, you can walk through the steps run the *PhoneFinder* process. To identify new and updated telephone numbers for constituents in your database, you must first create and run a submit process. With the submit process, you select the constituents and addresses to include in the search and send the data file to Blackbaud.

After Blackbaud updates the phone number information in the submitted data file, the primary or secondary contact at your organization receives a notification that the file is ready for retrieval. To upload the update file from Blackbaud, you must run the *PhoneFinder* retrieval process.

When you upload the update file from Blackbaud, the program generates a *PhoneFinder* batch with the information included in the file. To update your records with the phone number information, you must commit the batch. You can also edit the options for the process to specify the phone type and information source to assign phone numbers returned by the process.

Depending on your system role and security rights, you can also manage the *PhoneFinder* process from its page.

## Start a PhoneFinder Submit Process

After you edit the *PhoneFinder* submit process and select the constituents and addresses to include in the data file, you must run the submit process to send the data file to Blackbaud. When Blackbaud receives the data file, it scans all constituents in the data file to identify new and updated phone number information and compares the information against the national Do-Not-Call registry to help you respect your constituents' preferences.

You submit the data file from the *PhoneFinder* process page. Under **Step 1**, click **Start process**. The program automatically sends the data file to Blackbaud and displays the progress of the submit process on the status page.

For information about the process status page, refer to [Data Tune-Up Process Status Page on page 9](#).

## Edit a PhoneFinder Submit Process

To update your constituents with new and updated phone number information, you must run a *PhoneFinder* submit process. Before you run the submit process, you must select the constituents and addresses to include in the process.

### ➤ Select the constituents and addresses to include in a PhoneFinder process

1. Access the process page of the *PhoneFinder* process for which to submit a file.
2. Under **Step 1**, click **Edit** on the action bar. The Edit PhoneFinder submit process screen appears.

**Edit PhoneFinder submit process**

**Select constituents**

All constituents

Selected constituents:   

Include inactive constituents

**Address types**

Individuals:  

Organizations:  

Include incomplete addresses

**Phone types**

Individuals:  

Organizations:  

**Results**

Create selection from results

Selection name:

Overwrite existing selection

 Help

3. Under **Select constituents**, select whether to include all constituents or only selected constituents in the process. If you select **Selected constituents**, search for and select the selection of constituents to include.
4. Select whether to include inactive constituents in the process.
5. Under **Address types**, select which types of addresses to use for individual and organization constituents included in the process.
6. Select whether to include incomplete addresses in the process.

**Note:** A “complete” address includes an address block and the city and state or the Zip code. An “incomplete” address lacks an address block or the city, state, and Zip code.

7. Under **Phone types**, select which types of telephone numbers to use for individual and organization constituents included in the process.
8. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
9. Click **Save**. You return to the process page.

## Check the Availability of a PhoneFinder Retrieval File

You can check the availability of a pending update file at any time. On the *PhoneFinder* process page, click **Check file availability** under **Tasks**. If the update file is available for upload, the **Step 2** frame on the process page is enabled so you can retrieve the file. For information about how to retrieve the file, refer to [Start a PeopleFinder Retrieval Process on page 63](#).

## Start a PhoneFinder Retrieval Process

Once Blackbaud updates the constituent information in the submitted data file, the primary contact in the submission record is contacted and told the file is ready to be uploaded. If for some reason Blackbaud cannot reach the primary contact, the secondary contact is notified. After the contact receives this notification, you can run the retrieval process to get the update file from Blackbaud.

**Tip:** You can check the availability of the update file from the process page. To check the availability, click **Check file availability** under **Tasks**.

You can retrieve the update file from Blackbaud from the process page of the *PhoneFinder* process. Under **Step 2**, click **Start process** on the action bar. The program automatically uploads the update file and displays the status page of the retrieval process.

For information about the items on the status page, refer to [Data Tune-Up Process Status Page on page 9](#).

**Note:** To run the retrieval process again from its status page, click **Start process** under **Tasks**.

## PhoneFinder Report

After you run the retrieval process and upload the update file from Blackbaud, you can access the PhoneFinder Report. This report provides information about the constituents included in the process and indicates which constituents returned phone number information in the update file. To view the PhoneFinder Report, on the process status page, click **View report** under **Step 2**.

## PhoneFinder Batch

When you upload the update file from Blackbaud, the program generates a *PhoneFinder* batch with the information included in the file. To update your records with the information, you must commit the

batch. Before you commit a *PhoneFinder* batch, we recommend you review the update file uploaded from Blackbaud. The batch lists all constituents included in the update file, along with the new and updated information.

**Note:** For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

To view or edit the batch, under **Step 3**, click **Go to batch** or **Edit batch**. To commit the records in the batch to your database, click **Commit batch**.

## Edit PhoneFinder Process Options

Before you commit a *PhoneFinder* batch, you should specify the phone type and source to assign telephone numbers that the process verifies and returns. When you commit a *PhoneFinder* batch, the program updates the constituent records with the new or updated phone numbers and the selected phone type and source.

**Note:** *PhoneFinder* verifies the status of the submitted and returned phone numbers. When it verifies a returned number, it applies both the selected phone type and source information when you commit the batch. When it verifies an existing phone number, it applies the selected phone source information, but retains the current phone type for the number.

### > Edit the options for a PhoneFinder process

1. Access the process page of the *PhoneFinder* process for which to edit options.
2. Under **Step 3**, click **Edit** on the action bar and select **Process options**. The Edit PhoneFinder process options screen appears.

**Warning:** If multiple records of a submitted phone number exist for a constituent, the process does not mark the verified number as the primary phone number for the constituent.

3. Under **Phone options**, for individual and organization constituents, select the phone type to assign numbers that the process returns, and select whether to set the numbers that the process verifies or returns as the primary phone number.
4. Under **Phone source**, select the source for the phone number information, such as PhoneFinder.
5. Click **Save**. You return to the process page.