

Blackbaud Guided Fundraising™

DATA REQUEST GUIDE

VERSION 2019.2

Overview

The Blackbaud Guided Fundraising Data Request Guide provides you with guidelines for setting up your institution's file exports to load data into Guided Fundraising. After you create your file exports, visit the Data Loading section in Guided Fundraising to upload your files and map the fields. You should upload new files regularly so that agents in Guided Fundraising are working with the latest information.

Initial Data Load

When you initially load data into Guided Fundraising, provide all of the prospect records and gifts for people you plan to contact through Guided Fundraising.

Updates

As you upload new files daily, weekly, or on some other interval, you have the option to upload a file of only recent changes and additions. Uploading only changed records can save time on both exporting and uploading the data. At any point, you can upload the full files again. The ID fields on each file are used as keys for updating and matching records.

File Format:

- Files must be in comma separated values (CSV) or tab separated values (TSV) format
- Files can be no more than 500,000 rows
 - If your file is more than 500,000 rows, you can split it into multiple separate files
- Files can be no more than 100 MB in size
 - If your file is more than 100 MB in size, you can split it into multiple separate files

File 1: Prospect File

The Prospect File provides the biographical information for the prospects you are reaching out to through Guided Fundraising. You only need to provide data for prospects you plan to contact through Guided Fundraising.

Each individual entity should appear in only 1 row within the file.

Number	Name	Description	Example	Format
1	*Entity ID	Unique ID for this entity	31544	string/text
2	*First Name	The entity's preferred first name	Mary	string/text
3	Last Name		Smith	string/text
4	Job Title		Vice President of Marketing	string/text
5	Employer		Ace Pharmaceuticals	string/text
6	Primary Relationship Type		Alumni	string/text
7	Birth Date		04/04/1955	MM/dd/yyyy
8	Marital Status		Married	string/text
9	Gender		Female	string/text
10	Spouse ID		25041	string/text
11	Spouse Name	Preferred name of the spouse	Jim Smith	string/text
12	Preferred Email Address		mary.smith@reeher.info	string/text
13	Preferred Phone Number	The preferred phone number for the entity. Can be provided as a straight number or with dashes and other formatting.	(123) 456-7890	string/text
14	Mobile Phone Number	The mobile phone number of the entity. Can be provided as a straight number or with dashes and other formatting. Can be the same or different from the preferred phone number.	(123) 456-7890	string/text
15	Preferred Mailing Name		Mary Smith	string/text
16	Home Address Line 1		165 Western Ave N	string/text
17	Home Address Line 2			string/text
18	Home City		Saint Paul	string/text
19	Home State		MN	string/text
20	Home Zip		55102	string/text
21	Home Country		United States	string/text
22	Annual Giving Ask Amount		\$1,500	string/text
23	Preferred Class Year		1977	string/text
24	Assigned Officers		Richard Thiem, George Snyder	string/text
25	Giving Societies		President's Circle, Western Society	string/text
26	Contact Restrictions		Do Not Mail;Do Not Email	semicolon separated list
27	Participation History		Spring 2016 Gala;40th Reunion	semicolon separated list
28	Parents		John Smith; Sally Smith	semicolon separated list
29	Children		Sarah Smith; Joe Smith	semicolon separated list

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Number	Name	Description	Example	Format
30	School of Graduation		Arts and Sciences; Business	semicolon separated list
31	Athletics		Tennis; Swimming	semicolon separated list
32	Deceased Indicator	Indicates if the entity is deceased.	No	Multiple formats supported: <ul style="list-style-type: none"> • Y/N • Yes/No • True/False • T/F • 1/0

* Indicates required fields

File 2: Gift File

The Gift file provides a full history of all the donations for your prospects. You only need to provide gifts for the prospects you have loaded in Guided Fundraising. We recommend providing the full history of gifts for your prospects so that your agents have a full view of their giving. Giving history is also used to prioritize prospects within Guided Fundraising, and to time outreach based on giving anniversary.

This file can contain multiple rows per entity for each transaction related to the entity.

Number	Name	Description	Example	Format
1	*Unique Gift ID	Unique ID for this transaction. Each transaction must have a different Unique Gift ID. This is the key that will be used for updating transactions.	10000001	string/text
2	*Entity ID	The ID that corresponds to a record in the Prospect File.	12345678	string/text
3	*Legal Amount	Legal amount for this transaction for this entity. If multiple entities are involved with the transaction, the legal amount should not be double counted.	100.50	numeric value
4	*Credit Amount	Recognition credit amount for this transaction for this entity. If multiple entities are involved with the transaction, the amount to be double counted or it can be split between entities.	50.00	numeric value
5	*Transaction Date	Receipt date of the transaction.	01/01/2001	MM/dd/yyyy
6	*Fiscal Year	The fiscal year to which the transaction is attributed.	2001	numeric value
7	*Transaction Type	The type of the transaction.	Gift	string/text
8	Designation Code	The code of the designation / fund for the transaction.	SCHOL	
9	Designation Description	The description the designation / fund for the transaction.	Scholarships	string/text
10	Designation School/Unit	The description of the designation school or unit for the transaction.	Business	string/text

* Indicates required fields