

Blackbaud Guided Fundraising™

DATA REQUEST GUIDE FOR THE RAISER'S EDGE

VERSION 2019.3

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.

Export and Queue

We recommend using a combination of Export and Query to create your files. Use Export to create the field Output for the files, and use Query to filter the exports to only the constituents you plan to contact through Guided Fundraising. You can also use Query to limit the export to only changed records for your regular updates.

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.

The Name field below indicates the name of the field you will map to in Guided Fundraising. The RE Field Name indicates the name of the corresponding field in the Export module in The Raiser's Edge.

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

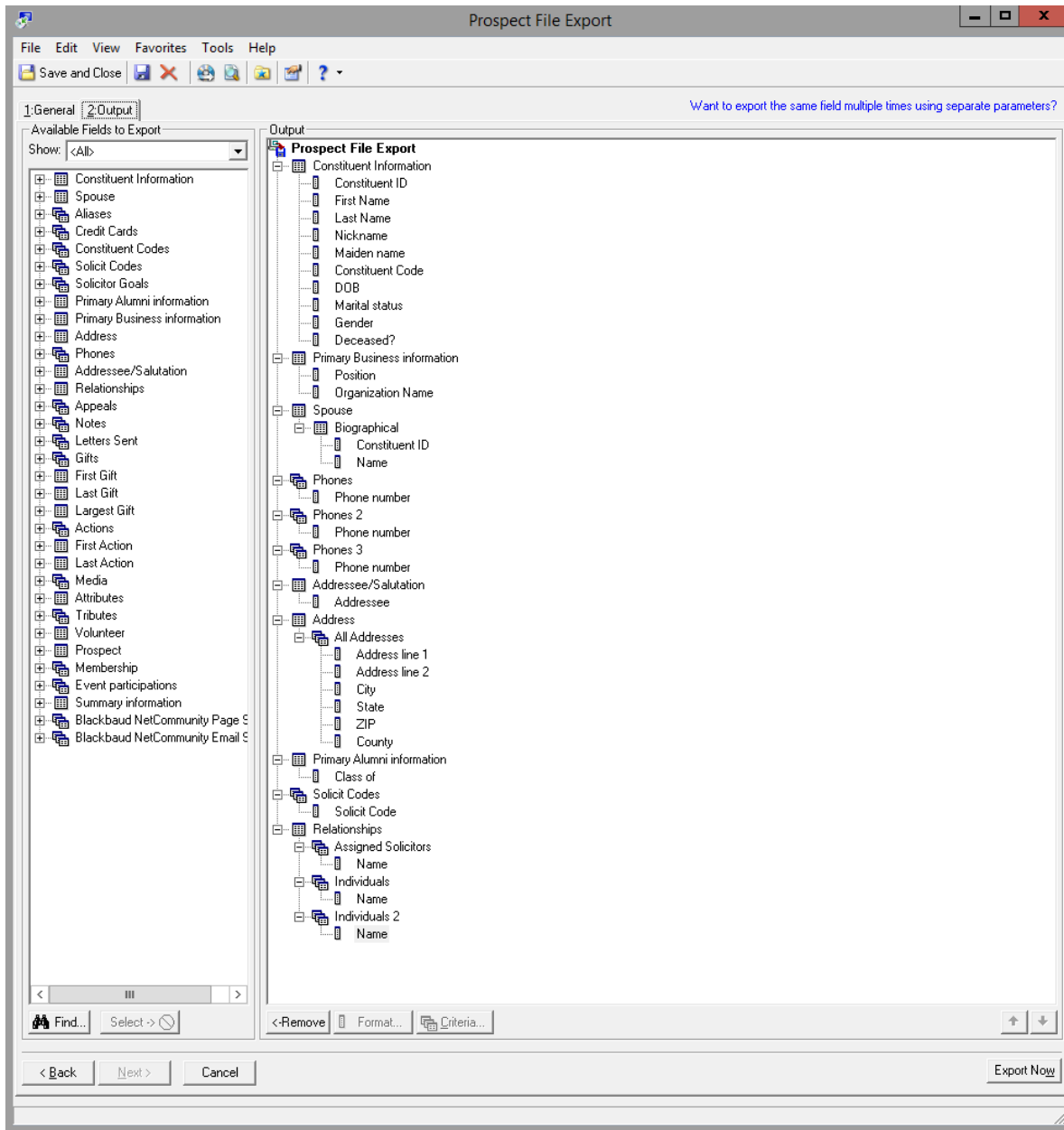
Number	Name	RE Field Name	Description	Example	Format
1	*Entity ID	Constituent Information > Constituent ID	Unique ID for this entity	31544	string/text
2	*First Name	Constituent Information > First Name	The entity's preferred first name	Katherine	string/text
3	Last Name	Constituent Information > Last Name		Smith	string/text
4	Nickname	Constituent Information > Nickname		Katie	
5	Maiden Name	Constituent Information > Maiden Name		Johnson	
6	Job Title	Primary Business information > Position		Vice President of Marketing	string/text
7	Employer	Primary Business information > Organization Name		Ace Pharmaceuticals	string/text
8	Primary Relationship Type	Constituent Information > Constituent Code		Alumni	string/text
9	Birth Date	Constituent Information > DOB		04/04/1955	MM/dd/yyyy
10	Marital Status	Constituent Information > Marital Status		Married	string/text
11	Gender	Constituent Information > Gender		Female	string/text
12	Spouse ID	Spouse > Biographical > Constituent ID		25041	string/text
13	Spouse Name	Spouse > Biographical > Name	Preferred name of the spouse	Jim Smith	string/text
14	Preferred Email Address	Phones > Phone Number		katie.smith@reeher.info	string/text
15	Preferred Phone Number	Phones > 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
16	Mobile Phone Number	Phones > 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

17	Preferred Mailing Name	Addressee/Salutation > Addressee		Katie Smith	string/text
18	Home Address Line 1	Address > Address line 1		165 Western Ave N	string/text
19	Home Address Line 2	Address > Address line 2			string/text
20	Home City	Address > City		Saint Paul	string/text
21	Home State	Address > State		MN	string/text
22	Home Zip	Address > Zip		55102	string/text
23	Home Country	Address > Country		United States	string/text
24	Annual Giving Ask Amount	Custom Attribute		\$1,500	string/text
25	Preferred Class Year	Primary Alumni information > Class of		1977	string/text
26	Assigned Officers	Relationships > Assigned Solicitors > Name	Can provide up to 5 different columns for different values	Richard Thiem	string/text
27	Giving Societies	Custom Attribute or Constituent Code	Can provide up to 10 different columns for different values	President's Circle	string/text
28	Contact Restrictions	Solicit Codes > Solicit Code	Can provide up to 10 different columns for different values	Do Not Mail	string/text
29	Participation History	Event Participation / Membership / Custom Attribute	Can provide up to 10 different columns for different values	Spring 2016 Gala	string/text
30	Parents	Relationships > Individuals > Name	Can provide up to 5 different columns for different values	Larry Johnson	string/text
31	Children	Relationships > Individuals > Name	Can provide up to 10 different columns for different values	Sarah Johnson	string/text
32	School of Graduation	Varies	Can provide up to 5 different columns for different values	Arts and Sciences	string/text
33	Major	Varies	Can provide up to 5 different columns for different values	Economics	
34	Athletics	Custom Attribute	Can provide up to 5 different columns for different values	Tennis	string/text
35	Deceased Indicator	Constituent Information > Deceased?	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

Prospect File Sample Export:

The screenshot below is an example of how Export can be set up to create this file. Note that some of your exported fields may vary depending on how you use Raiser's Edge.



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.

The Name field below indicates the name of the field you will map to in Guided Fundraising. The RE Field Name indicates the name of the corresponding field in the Export module in The Raiser's Edge.

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

Number	Name	RE Field Name	Description	Example	Format
1	*Unique Gift ID	System Record 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	Constituent ID	The ID that corresponds to a record in the Prospect File	12345678	string/text
3	*Gift Amount	Gift Amount	The total amount of the gift.	100.00	numeric value
4	Soft Credit Constituent ID	Soft Credit Constituent ID	Constituent ID for constituents soft credited on the gift. Can provide up to 10 Soft Credit Constituent ID columns for different constituents soft credited.	20194856	string/text
5	Soft Credit Amount	Soft Credit Amount	The soft credit amount for constituents soft credited on the gift. Can provide up to 10 Soft Credit Amount columns for different constituents soft credited.	100.00	numeric value
6	*Gift Date	Gift Date	Receipt date of the transaction.	01/01/2001	MM/dd/yyyy
7	*Gift Type	Gift Type	The type of the transaction.	Gift	string/text
8	Fund Code	Fund ID	The designation / fund associated with the gift. Can provide up to 10 Fund columns for different funds associated with the gift.	SCHOL	string/text
9	Fund Description	Fund Description	The description the designation / fund associated with the gift. Can provide up to 10 Fund Description columns for different funds associated with the gift.	Scholarships	string/text
10	Fund Amount	Fund Amount	The amount for each fund associated with the gift. Can provide up to 10 Fund columns for different funds associated with the gift.	50.00	numeric value
11	Fund Category	Fund Category	The fund category associated with the gift. Can provide up to 10 Fund Category columns for different funds associated with the gift.	Business	string/text

* Indicates required fields

Gift File Sample Export:

The screenshot below is an example of how Export can be set up to create this file. Note that some of your exported fields may vary depending on how you use Raiser's Edge.

