The Raiser's Edge™

AuctionMaestro Pro Integration Guide

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What Is In This Guide?

In the *AuctionMaestro Pro Integration Guide*, you learn how to integrate ***The Raiser's Edge Enterprise*** with *AuctionMaestro Pro 4.5*. With the integration, you can manage your auction events and link your records in ***The Raiser's Edge*** with your auction and people databases in *AuctionMaestro Pro*. You can also learn about the following:

- "AuctionMaestro Pro Integration Setup Information" on page 2
- "Navigating in AuctionMaestro Pro Integration" on page 6
- "Configuration Tasks" on page 10
- "Transfer Constituents to AuctionMaestro Pro" on page 26
- "Download Transactions from AuctionMaestro Pro" on page 42
- "View AuctionMaestro Pro Transaction Details from The Raiser's Edge" on page 46
- "Consignment Transaction Handling" on page 49
- "Field Mapping" on page 51

How Do I Use These Guides?

The Raiser's Edge Enterprise user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

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Note: To successfully integrate with ***The Raiser's Edge***, you must run *AuctionMaestro Pro 4.5*. For assistance with auctions, visit www.auctionhelp.com.

AuctionMaestro Pro is an application designed to help manage your benefit fundraising auctions from start-to-finish. With *AuctionMaestro Pro Integration*, ***The Raiser's Edge Enterprise*** can integrate constituent and gift records with your auction and people records in *AuctionMaestro Pro 4.5*. You can integrate the two programs to help manage all aspects of your auction events.

When you integrate the two programs, you can include constituents you add to ***The Raiser's Edge*** as people in *AuctionMaestro Pro*. Additionally, you can assign transactions in your *AuctionMaestro Pro* database to funds in ***The Raiser's Edge*** and download the *AuctionMaestro Pro* auction transactions as gift records in ***The Raiser's Edge***.

If you use *Event Management*, additional tasks are available. With the optional modules *AuctionMaestro Pro* and *Event Management*, you can associate an event record in ***The Raiser's Edge*** with auction databases in *AuctionMaestro Pro* and transfer event data from ***The Raiser's Edge*** to *AuctionMaestro Pro*. When you download auction transactions from *AuctionMaestro Pro*, you can create new participant records in ***The Raiser's Edge*** for new auction participants in your *AuctionMaestro Pro* people database.

AuctionMaestro Pro Integration Setup Information

Before you begin to work with *AuctionMaestro Pro Integration*, it is important to understand some basic setup information that will help when you integrate ***The Raiser's Edge*** with *AuctionMaestro Pro*. This section outlines the information to be aware of before you integrate the two programs. This section also offers a basic overview and directs you to more detailed sections and procedures in this chapter to help you get started. Setup information includes assigning your user rights in *Security* and backing up your databases.

AuctionMaestro Pro Integration Security

Your user rights are assigned in *Security*, accessed by clicking **Admin** on the Raiser's Edge bar. The security settings affect only your ability to access the *AuctionMaestro Pro Integration* functions. You also need the applicable ***Raiser's Edge*** rights for the functions you perform in *AuctionMaestro Pro Integration*. For example, to fully commit transactions downloaded from *AuctionMaestro Pro* to the database in ***The Raiser's Edge***, you must have security privileges in *Batch*.

Note: For more information about security and security groups, see the *Configuration and Security Guide*.

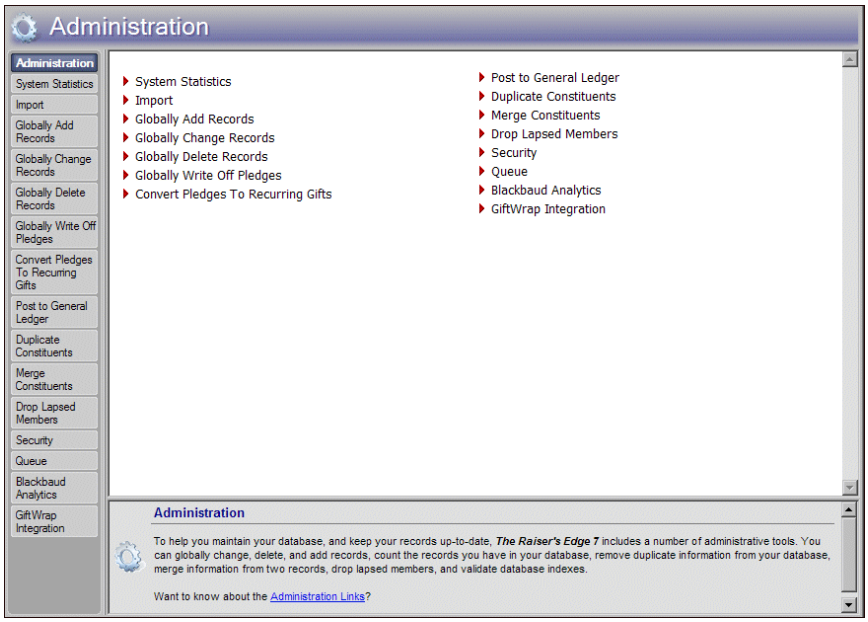
Security access for *AuctionMaestro Pro Integration* can be assigned to specific areas, so you may have access to some areas but not others. For example, a security group may have access to transfer constituents to *AuctionMaestro Pro* but not configure the integration or download transactions from *AuctionMaestro Pro*.

If, on the New Group screen, **AMPro Integration** is marked in the **Group Privileges** box, the members of the group have access to *AuctionMaestro Pro Integration*.

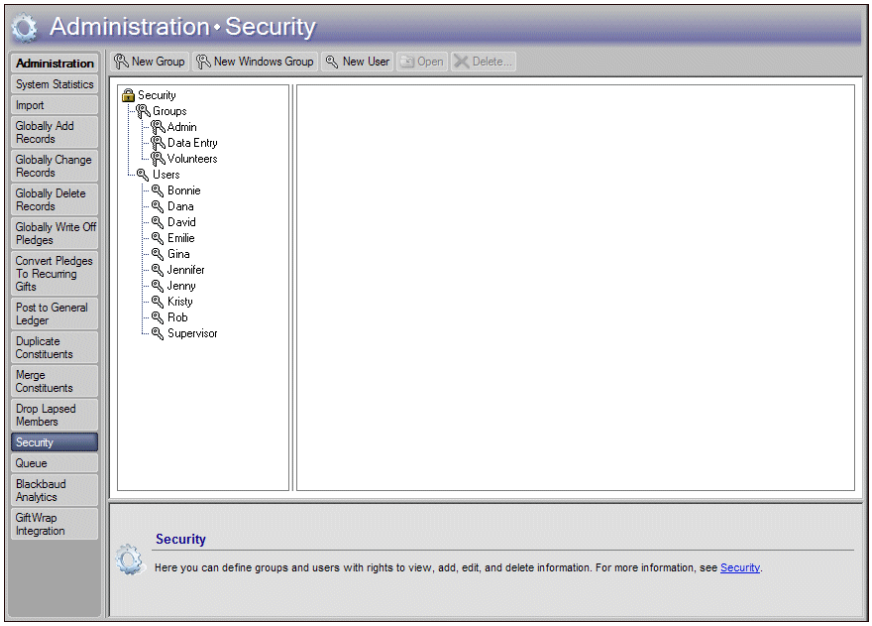
Assigning security privileges for AuctionMaestro Pro Integration

This procedure explains how to assign security settings specific to *AuctionMaestro Pro Integration*.

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.



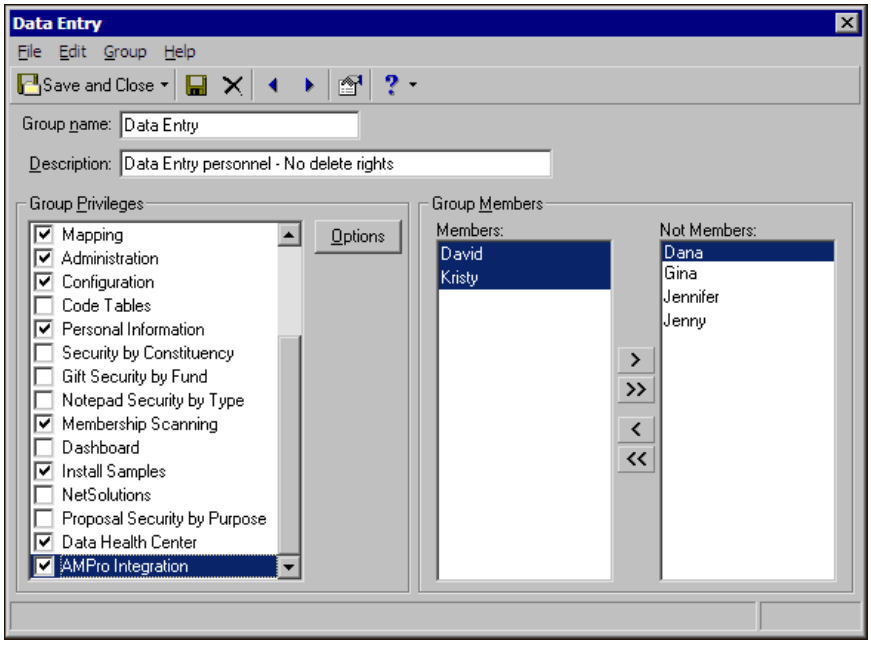
2. Click **Security**. The Security page appears.



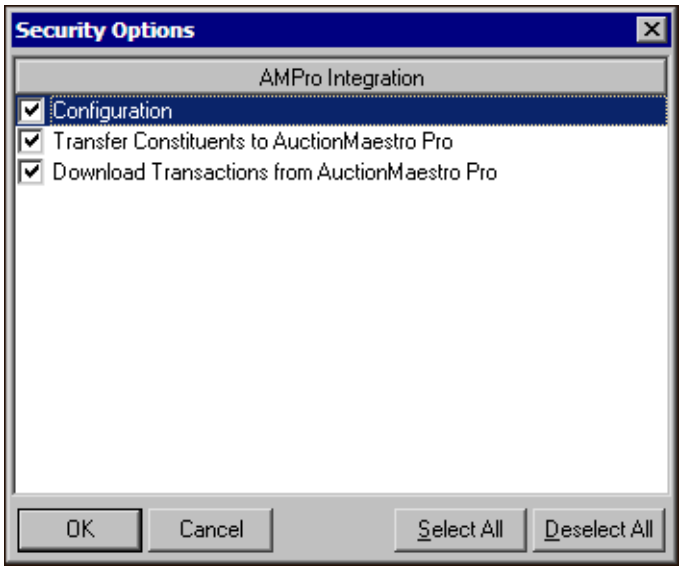
Note: To create a new security group for *AuctionMaestro Pro* users, click **New Group** on the action bar. For more information about how to create a security group, see the *Configuration and Security Guide*.

3. Under **Groups** in the **Security** tree view list on the left, select the security group to assign access to *AuctionMaestro Pro Integration*. For example, to assign the data entry personnel access to *AuctionMaestro Pro Integration*, select the Data Entry group.
4. On the action bar, click **Open**. The selected group screen appears.

5. In the **Group Privileges** box, mark **AMPro Integration**. When you mark this checkbox, the **Options** button is enabled.



6. Click **Options**. The Security Options screen appears.



7. For each area of *AuctionMaestro Pro Integration* you want the members of the security group to have access, mark the corresponding checkbox. You can select to assign security groups to **Configuration**, **Transfer Constituents to AuctionMaestro Pro**, and **Download Transactions from AuctionMaestro Pro**.

   To mark all checkboxes, click **Select All**. To unmark all checkboxes, click **Deselect All**.

8. Click **OK**. You return to the selected group screen.
9. Click **Save and Close**. You return to the Security page of *Administration*.

Backup Databases

Warning: To help prevent data loss and ease the restoration of a backed up database, we recommend you back up each application's databases before and after each data transfer and transaction download.

After you integrate your databases in ***The Raiser's Edge*** and *AuctionMaestro Pro*, a database restored to its backup from before you last synchronized the two programs can result in broken links in data between the various databases. If you must restore a database to it previous backup from before the synchronization, such as after an application system failure, there are several issues to be aware of.

- People records created in *AuctionMaestro Pro* from constituent records transferred from ***The Raiser's Edge*** after the backup was created no longer exist in restored *AuctionMaestro Pro* database.
- Constituent records created in ***The Raiser's Edge*** from people records downloaded from *AuctionMaestro Pro* after the backup was created no longer exist in restored ***Raiser's Edge*** database.
- Transactions entered in *AuctionMaestro Pro* after the backup was created no longer exist in the restored *AuctionMaestro Pro* auction database. Gift records created in ***The Raiser's Edge*** from these downloaded transactions are no longer linked to the restored *AuctionMaestro Pro* database.

Restoring an AuctionMaestro Pro database from backup

1. Restore the *AuctionMaestro Pro* database from backup. For more information about how to restore a database in *AuctionMaestro Pro*, see the *MaestroSoft Training Manual for AuctionMaestro Pro*.
2. Log into ***The Raiser's Edge***.
3. On the Raiser's Edge bar, click **AuctionMaestro Pro Integration**. The AuctionMaestro Pro Integration page appears, and a message appears to inform you of the tasks ***The Raiser's Edge*** will perform to resolve the issues created from the backed up database restoration.
4. Click **OK**. ***The Raiser's Edge*** resolves the issues created from the database restoration.
   - ***The Raiser's Edge*** removes any links from constituent records that no longer have corresponding people records in *AuctionMaestro Pro*.
   - ***The Raiser's Edge*** creates a query of gift records created from transactions that no longer exist in the *AuctionMaestro Pro* database. To avoid duplicate gift records, ***The Raiser's Edge*** deletes these gift records from any unposted batches.
5. After ***The Raiser's Edge*** is finished, you can transfer the constituent record data to the *AuctionMaestro Pro* people database and use the gift query to recreate the transactions in *AuctionMaestro Pro*. For more information about how to transfer constituent data to *AuctionMaestro Pro*, see "Transfer Constituents to AuctionMaestro Pro" on page 26.

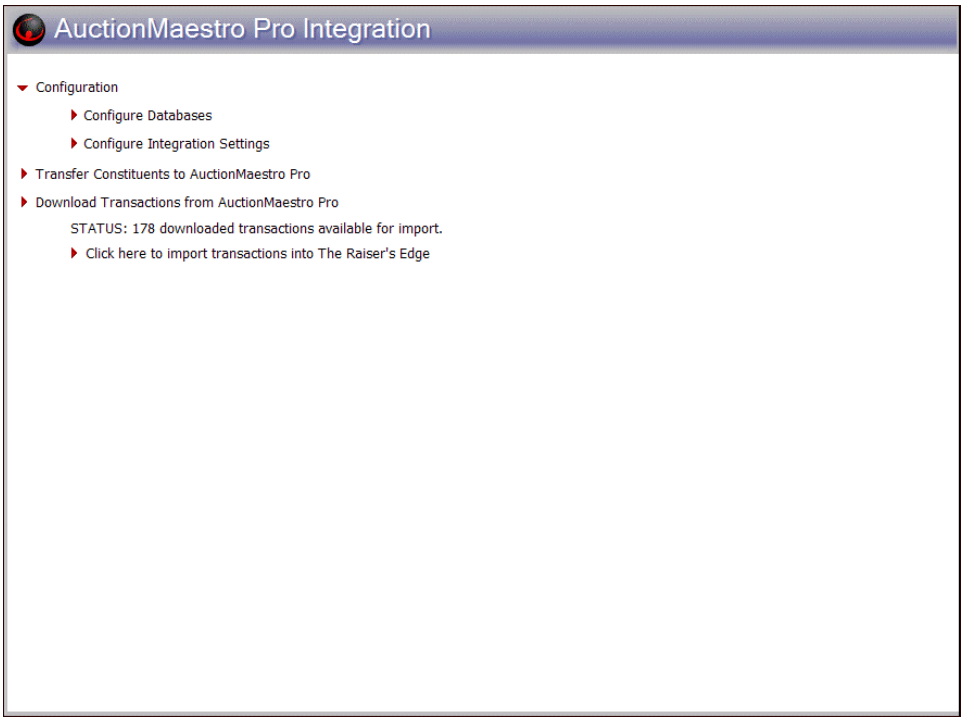
Restoring a Raiser's Edge database from backup

1. Use the Blackbaud Management Console to restore the ***Raiser's Edge*** database from backup. For more information about how to restore a database in ***The Raiser's Edge***, see the *Database Administration Guide*.
2. Log into ***The Raiser's Edge***.
3. On the Raiser's Edge bar, click **AuctionMaestro Pro Integration**. The AuctionMaestro Pro Integration page appears, and a message appears to inform you of the tasks ***The Raiser's Edge*** will perform to resolve the issues created from the backed up database restoration.

Navigating in AuctionMaestro Pro Integration

Note: The tasks that appear on the AuctionMaestro Pro Integration page depend on the security settings for your security group in ***The Raiser's Edge***. For more information about security in *AuctionMaestro Pro Integration*, see "AuctionMaestro Pro Integration Security" on page 2.

The AuctionMaestro Pro Integration page is the central location in ***The Raiser's Edge*** for all functions to set up, maintain, and use the integration with *AuctionMaestro Pro*. To access the AuctionMaestro Pro Integration page, click **AuctionMaestro Pro Integration** on the Raiser's Edge bar.



On the AuctionMaestro Pro Integration page, you access tasks related to the integration between ***The Raiser's Edge*** and *AuctionMaestro Pro*. On the AuctionMaestro Pro Integration page, you can set up the integration between the two programs, such as connect the databases in ***The Raiser's Edge*** to the databases in *AuctionMaestro Pro* and configure the download settings. After you configure the integration, you can transfer constituents from ***The Raiser's Edge*** to your people database in *AuctionMaestro Pro*. You can also download transactions from *AuctionMaestro Pro* into ***The Raiser's Edge***.

Configuration. Before you transfer data between ***The Raiser's Edge*** and *AuctionMaestro Pro*, you must configure the integration between the two programs. When you configure the integration, you connect the databases of the two programs and set the data transfer and transaction download settings. For more information about how to configure the integration, see "Configuration Tasks" on page 10.

Transfer Constituents to AuctionMaestro Pro. With *AuctionMaestro Pro Integration*, you can transfer constituent data in ***The Raiser's Edge*** to a people database in *AuctionMaestro Pro*. Before you transfer constituent data to *AuctionMaestro Pro*, you select which records to consider for transfer and determine how the data transfers. After you specify the data to transfer and in what format, you can easily transfer the constituent data from ***The Raiser's Edge*** to the specified people database in *AuctionMaestro Pro*. For more information about how to transfer constituent data to AuctionMaestro Pro, see "Transfer Constituents to AuctionMaestro Pro" on page 26.

Download Transactions from AuctionMaestro Pro. With *AuctionMaestro Pro Integration*, you can download transaction data from your auction database in *AuctionMaestro Pro* to gift records in ***The Raiser's Edge***. Before you download transaction data, you must specify the location of the *AuctionMaestro Pro* auction database and configure the transaction download settings. When you are ready to download transactions from *AuctionMaestro Pro*, *AuctionMaestro Pro Integration* checks the specified databases for new transactions. If new transactions exist, you can then download them into ***The Raiser's Edge***.

Once you download the transactions from *AuctionMaestro Pro*, ***The Raiser's Edge*** creates a batch of downloaded transactions. After you commit the batch and import the transactions from *AuctionMaestro Pro* to the database, you can view the original *AuctionMaestro Pro* transaction details of the gift record generated in ***The Raiser's Edge***. For more information about download transaction data from *AuctionMaestro Pro*, see "Download Transactions from AuctionMaestro Pro" on page 42.

AuctionMaestro Pro Integration Configuration

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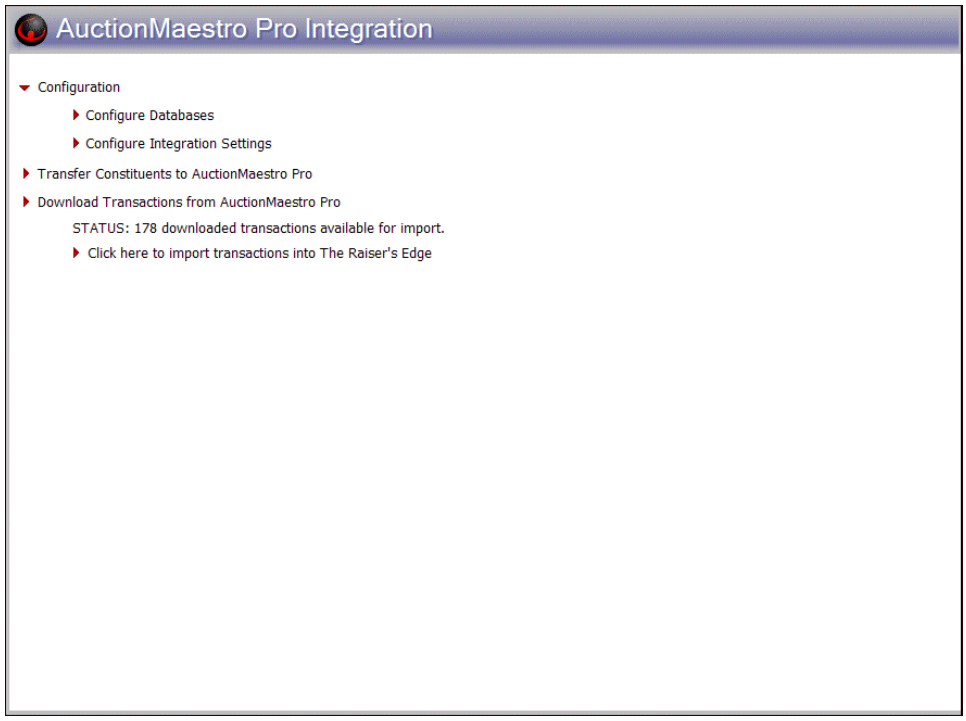
Note: To perform configuration tasks, the user must have security privileges related to *Configuration*. If the user does not have security privileges, the **Configuration** link appears on the AuctionMaestro Pro Integration page but is disabled. For more information about security in *AuctionMaestro Pro Integration*, see "AuctionMaestro Pro Integration Security" on page 2.

To integrate ***The Raiser's Edge*** with *AuctionMaestro Pro*, you must first configure the auction and people databases in *AuctionMaestro Pro*. From the AuctionMaestro Pro Integration page in ***The Raiser's Edge***, you configure the integration settings in ***The Raiser's Edge*** and *AuctionMaestro Pro*. You also connect *AuctionMaestro Pro Integration* to a directory of the historical *AuctionMaestro Pro* databases. When you connect to the historical databases, you can view the original *AuctionMaestro Pro* details about a gift record you download to ***The Raiser's Edge***.

Configuration Tasks

To access a configuration task, on the AuctionMaestro Pro Integration page, click **Configuration**. Under **Configuration**, the configuration tasks appear.



Configure databases. To integrate ***The Raiser's Edge*** with *AuctionMaestro Pro*, you must first configure the databases in both programs. For more information about how to configure the databases in both programs, see "Configure Databases" on page 11.

Configure Integration Settings. With *AuctionMaestro Pro Integration*, you can easily transfer data between ***The Raiser's Edge*** and *AuctionMaestro Pro*. This helps prevent data entry personnel from duplicating their effort in each program. Before you transfer data between the two programs, you must specify which data to transfer. For more information about how to configure the transfer and download settings, see "Configure Integration Settings" on page 13.

Configure Databases

Note: If you try to perform any *AuctionMaestro Pro Integration* tasks before you connect the databases, a message appears. To return to the AuctionMaestro Pro Integration page, click **OK**.

To integrate ***The Raiser's Edge*** with *AuctionMaestro Pro*, you must first connect the databases in both programs. Before you connect the databases, you must properly configure the auction and people databases in *AuctionMaestro Pro*. After the *AuctionMaestro Pro* databases are configured, you can connect them to the databases in ***The Raiser's Edge*** from the AuctionMaestro Pro Integration page.

AuctionMaestro Pro Database Configuration Considerations

Before you connect to your databases in *AuctionMaestro Pro*, you must properly configure the *AuctionMaestro Pro* databases to enable integration. This section provides the recommended steps to successfully configure the databases in *AuctionMaestro Pro* for integration with ***The Raiser's Edge***. We recommend you use this checklist to help you through each process.

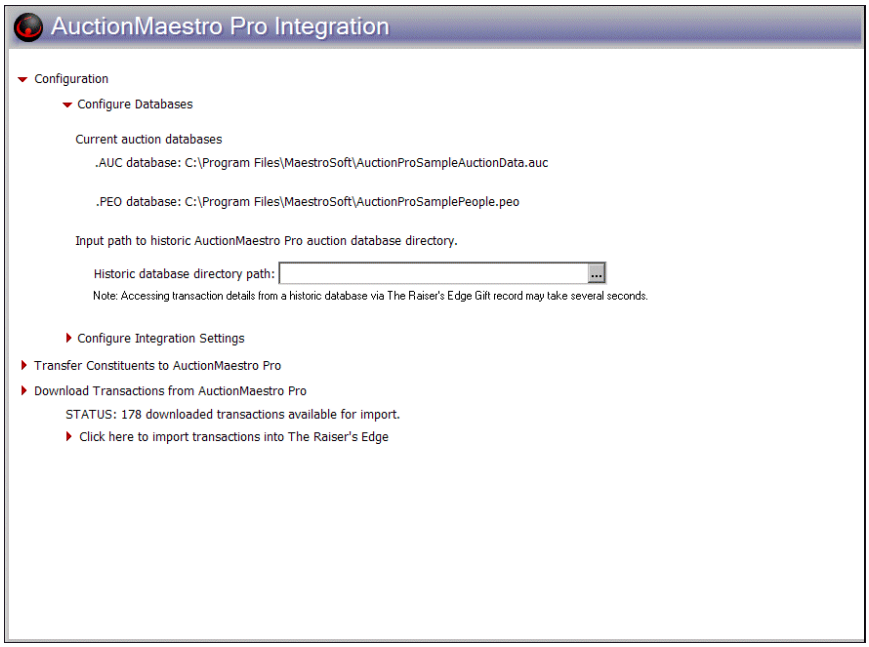
- ❑ In *AuctionMaestro Pro*, the database administrator must properly create and pair the auction (.AUC) and people (.PEO) databases to connect to ***The Raiser's Edge***. For more information about how to create and pair databases in *AuctionMaestro Pro*, see the *MaestroSoft Training Manual for AuctionMaestro Pro*.
- ❑ If the *AuctionMaestro Pro* databases are not available on the local workstation, ***The Raiser's Edge*** must be able to access them by way of a network connection.
- ❑ All historical *AuctionMaestro Pro* auction and people databases must be in the same directory and cannot be renamed or deleted.

Database Connection Procedure

To integrate ***The Raiser's Edge*** with *AuctionMaestro Pro*, you must first set up the connection between the databases in both programs. Before you set up the connection, make sure the *AuctionMaestro Pro* databases are properly configured to enable integration. For more information about *AuctionMaestro Pro* database configuration, see "AuctionMaestro Pro Database Configuration Considerations" on page 11.

- **Configure the connection to the databases in AuctionMaestro Pro**

1. On the AuctionMaestro Pro Integration page, click **Configuration**, **Configure Databases**. The Configure Databases tasks appear.



Under **Current auction databases**, the location of the current *AuctionMaestro Pro* auction (.AUC) and people (.PEO) databases appear, as detected by *AuctionMaestro Pro Integration*.

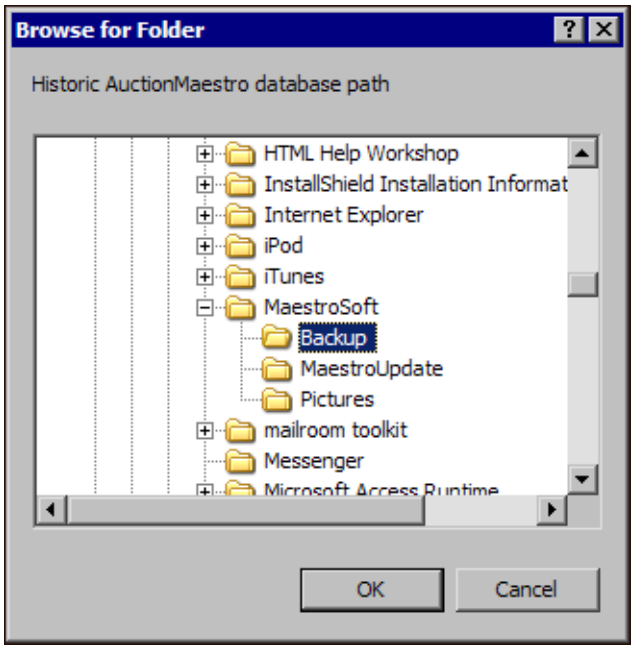
If you change the current databases, first change the pair in *AuctionMaestro Pro*. When you change the databases in *AuctionMaestro Pro*, they automatically change in ***The Raiser's Edge***.

Note: With *AuctionMaestro Pro Integration*, you can open a gift record in ***The Raiser's Edge*** that was created from an *AuctionMaestro Pro* transaction and view details about the original transaction in *AuctionMaestro Pro*. For information about how to view *AuctionMaestro Pro* details from the gift record, see "View AuctionMaestro Pro Transaction Details from The Raiser's Edge" on page 46.

2. To allow users to view transactions created from an *AuctionMaestro Pro* database that is not currently connected, enter the path to the historic databases.
3. In the **Historic database directory path** field under **Input path to AuctionMaestro Pro historic auction databases**, enter the location of the shared directory of all your historical *AuctionMaestro Pro* auction and people databases.

   All historical *AuctionMaestro Pro* auction and people databases must be in the same directory and cannot be renamed or deleted. If a historical *AuctionMaestro Pro* database is renamed or removed from the directory, you cannot view details about an original transaction in the database from ***The Raiser's Edge***.

4. To map to the location, click the ellipsis. The Browse for Folder screen appears.



5. Browse to the shared directory of all your historical *AuctionMaestro Pro* auction and people databases.
6. Click **OK**. You return to the AuctionMaestro Pro Integration page. In the **Historic database directory path** field, the path to the selected location appears.

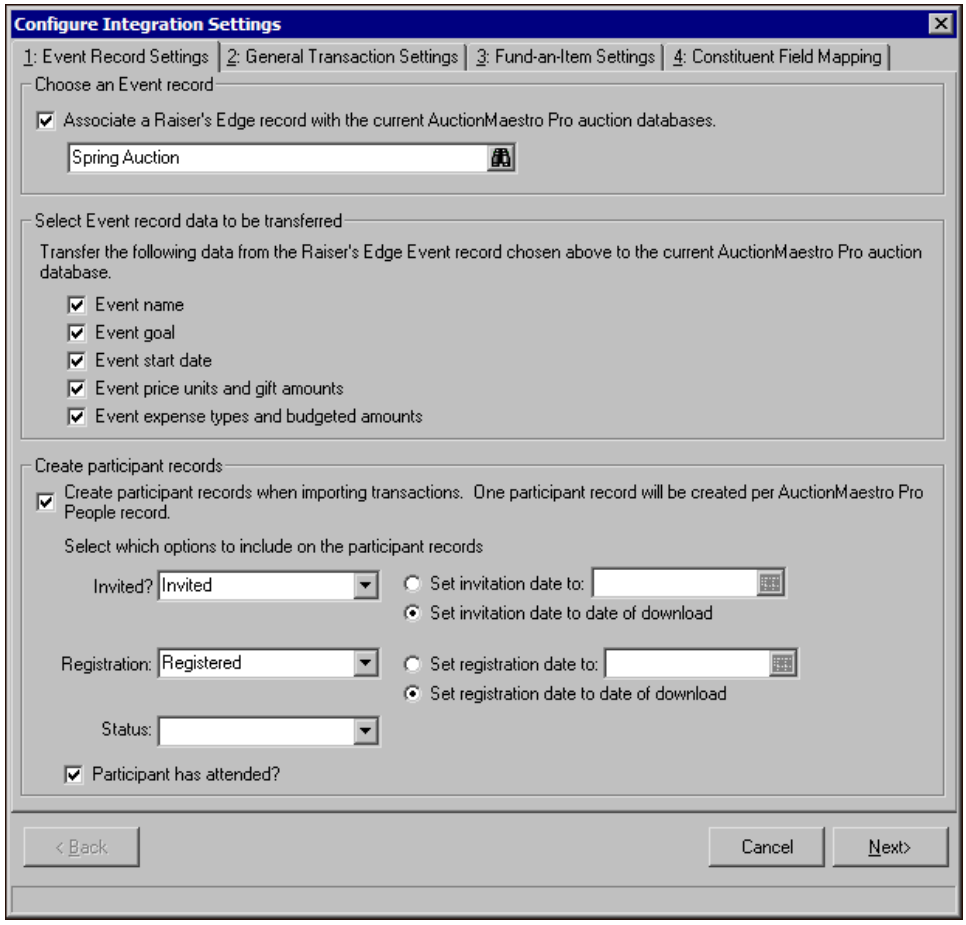
Configure Integration Settings

To help prevent data entry personnel from duplicating their effort in ***The Raiser's Edge*** and *AuctionMaestro Pro*, you can use *AuctionMaestro Pro Integration* to transfer data between the two programs. Before you transfer data between ***The Raiser's Edge*** and *AuctionMaestro Pro*, you must specify the data to transfer. On the Configure Integration Settings screen, select the transaction types to download from *AuctionMaestro Pro* and assign funds in ***The Raiser's Edge*** for each transaction type. For Fund-an-Item transactions, you can assign different funds in ***The Raiser's Edge*** to each transaction.

If you use *Event Management*, you can associate an event record in ***The Raiser's Edge*** with a connected auction database in *AuctionMaestro Pro*. You select the data from the event record in ***The Raiser's Edge*** to transfer to the auction database in *AuctionMaestro Pro*. When you download auction event data from *AuctionMaestro Pro* to ***The Raiser's Edge***, you can select to create participant records for each record downloaded from the people database in *AuctionMaestro Pro*.

Warning: To configure the integration settings, your *AuctionMaestro Pro* database must be of the latest version. If your database needs to be updated when you click **Configure Integration Settings**, a message appears. Click **OK** and use *MaestroUpdate* to upgrade *AuctionMaestro Pro*. For information about how to update *AuctionMaestro Pro*, see the *MaestroSoft Training Manual for AuctionMaestro Pro*.

To configure the settings of the data transfer, from the AuctionMaestro Pro Integration page, click **Configure Integration Settings**. The Configure Integration Settings screen appears. To help navigate through the types of data to transfer, the Configure Integration Settings screen contains multiple tabs.

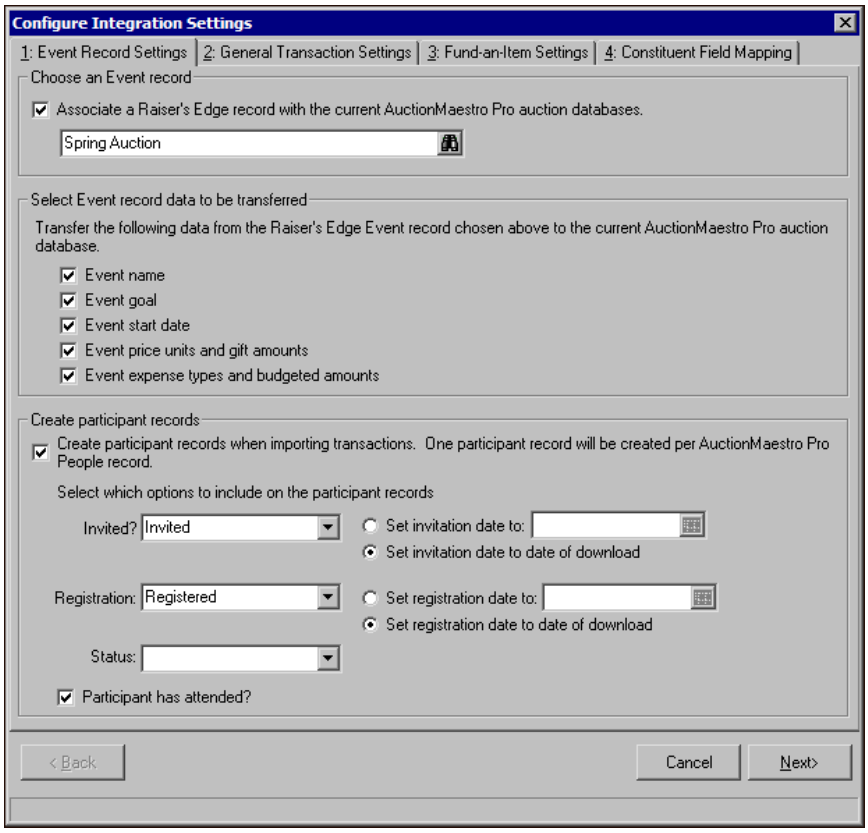


Event Record Settings Tab

If you have *Event Management*, the Event Record Settings tab appears. On the Event Record Settings tab, you can select to associate an event record in ***The Raiser's Edge*** with the specified auction database in *AuctionMaestro Pro*. When you associate an event record with the auction database, you select the data from the event record in ***The Raiser's Edge*** to transfer and whether to create participant records for each record downloaded from the people database in *AuctionMaestro Pro*.

Configure the event data transfer settings

1. On the AuctionMaestro Pro Integration page, click **Configuration**, **Configure Integration Settings**. The Configure Integration Settings screen appears.



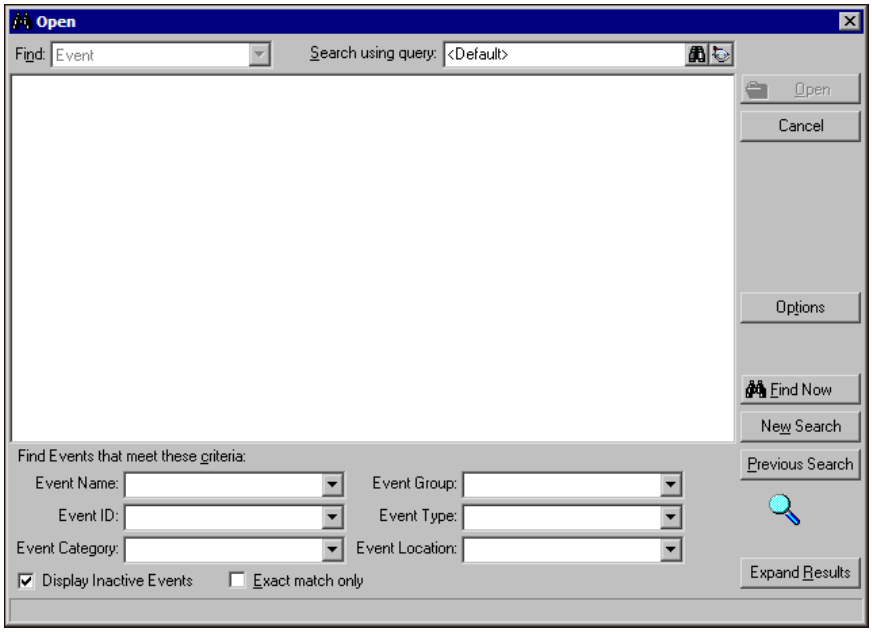
2. Select the Event Record Settings tab.

Note: To not associate an event record with the auction database, do not mark **Associate a Raiser's Edge record with the current AuctionMaestro Pro auction databases**. To configure the integration settings, click **Next** or select the General Transaction Settings tab.

3. To associate an event record in ***The Raiser's Edge*** with the connected auction database in *AuctionMaestro Pro*, in the **Choose an Event record** frame, mark **Associate a Raiser's Edge record with the current AuctionMaestro Pro auction databases**.

Note: On the Open screen, if the criteria fields do not provide enough search criteria options, use the **Search using query** field to further filter your results. For more information about how to use this field, see the *Program Basics Guide*.

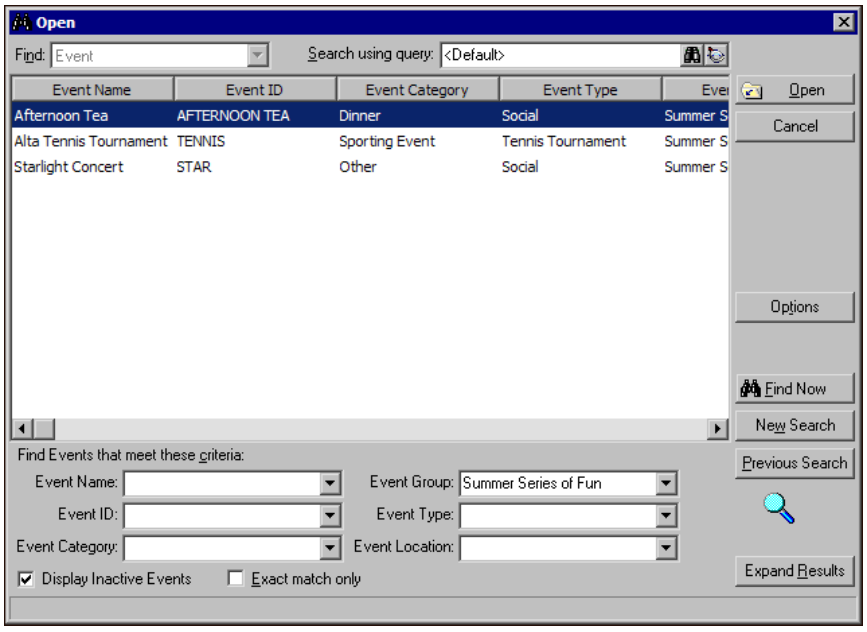
When this checkbox is marked, its corresponding text field is enabled. In the field, click the binoculars. The Open screen for Events appears.



4. Under **Find Events that meet these criteria**, specify the criteria to use to search for your event and select the information in the appropriate criteria fields. The criteria you use can include the **Event Name**, **Event ID**, **Event Category**, **Event Group**, **Event Type**, and **Event Location**.

   You can also select whether to **Display Inactive Events** or search for an **Exact match only**.

5. Click **Find Now**. If the search criteria entered matches an event in the database, it appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find multiple records.



6. In the grid, select the event and click **Open**. You return to the Event Record Settings tab of the Configure Integration Settings screen. In the **Choose an Event record** frame, the selected event appears.

7. If **Associate a Raiser's Edge Event record with the current AuctionMaestro Pro auction databases** is marked, the **Select Event record data to be transferred** frame is enabled. In the **Select Event record data to be transferred** frame, mark the checkbox next to each type of data to transfer from the selected event record to the connected auction database.
   - **Event name** – To transfer the event name in ***The Raiser's Edge*** to the **Auction Name** field on the Set Auction Name, Date and Goal screen in *AuctionMaestro Pro*, mark this checkbox.
   - **Event goal** – To transfer the event goal in ***The Raiser's Edge*** to the **Total Goal** field on the Set Auction Name, Date and Goal screen in *AuctionMaestro Pro*, mark this checkbox.
   - **Event start date** – To transfer the event start date in ***The Raiser's Edge*** to the **Select Auction Date** field on the Set Auction Name, Date and Goal screen in *AuctionMaestro Pro*, mark this checkbox.

Warning: When you mark **Event price units and gift amounts** or **Event expense types and budgeted amounts**, this data transfers to tables in *AuctionMaestro Pro* that contain sample data. To prevent sample data from appearing in your event record data, we recommend you delete unused sample data from the Recognition Level screen and Enter Expense Category Budgets tab of the Budget & Expenses screen in *AuctionMaestro Pro* before you transfer the data.

   - **Event price units and gift amounts** – To transfer the event price units and gift amounts from ***The Raiser's Edge*** to the table on the Recognition Level screen in *AuctionMaestro Pro*, mark this checkbox. The price units transfer to the **Recognition/Registration Level** column, and the gift amounts transfer to the **Donation** column. Before you transfer this data, we recommend you delete any unused sample data from the Recognition Level screen.
   - **Event expense types and budgeted amounts** – To transfer the event expense types and budgeted amount from ***The Raiser's Edge*** to the table on the Enter Expense Category Budgets tab of the Budget & Expenses screen in *AuctionMaestro Pro*, mark this checkbox. The expense types transfer to the **Expense Category** column, and the budgeted amounts transfer to the **Budget** column. On the Enter Expense Category Budgets tab, the **Direct** checkbox is marked for all transferred data. Before you transfer this data, we recommend you delete any unused sample data from the Enter Expense Category Budgets tab of the Budget & Expenses screen.

Note: To create participant records in ***The Raiser's Edge***, the user must have security privileges related to creating participant records. For more information about security privileges, see the *Configuration and Security Guide*.

8. If **Associate a Raiser's Edge Event record with the current AuctionMaestro Pro auction databases** is marked, the **Create participant records** frame is enabled. When you download auction event data from *AuctionMaestro Pro* to ***The Raiser's Edge***, you can create participant records for each people record downloaded from *AuctionMaestro Pro*. To create a participant record in ***The Raiser's Edge*** for each downloaded people record, in the **Create participant records** frame, mark **Create participant records when downloading transactions**.

   When this checkbox is marked, the **Create participant records** frame is enabled. In this frame, select the data to appear on all participant records created during the download.

   - In the **Invited?** field, select the invitation status of the auction participants. Select "Invited", "Do not invite", or "Not invited".

     If you select "Invited", set the invitation date to the date of the download or to another specified date.
   - In the **Registration** field, select the registration status of the auction participants. Select "Registered", "Do not register", or "Not registered".

     If you select "Registered", set the registration date to the date of the download or to another specified date.
   - In the **Status** field, select the participant's status from the active statuses in ***The Raiser's Edge***. Use this field any way that is best for your organization, such as to track a participant's Paid or Not Paid status.
   - To indicate whether the participants attended the auction, mark **Participant has attended?**.

9. Click **Next** or select the General Transaction Settings tab. The General Transaction Settings tab appears. For information about this tab, see “General Transaction Settings Tab” on page 18.

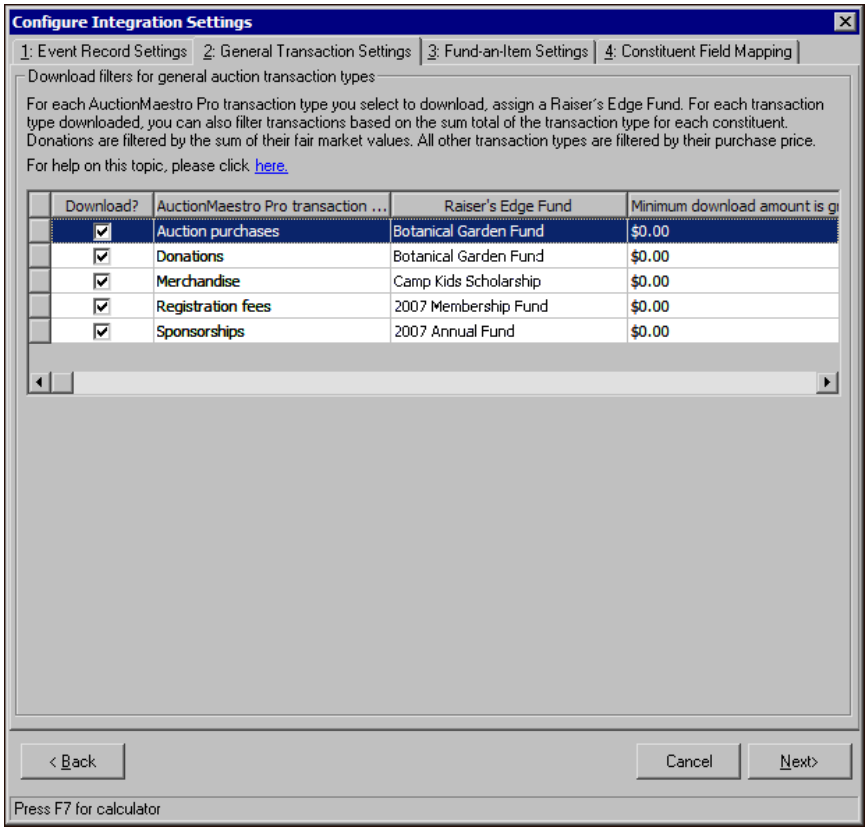
General Transaction Settings Tab

Note: You cannot delete the funds in ***The Raiser’s Edge*** you assign to *AuctionMaestro Pro* transaction types that are used by *AuctionMaestro Pro Integration*. If you attempt to delete a fund that *AuctionMaestro Pro Integration* uses, a message appears. To return to the General Transactions Settings tab, click **OK**.

On the General Transaction Settings tab, you specify the transaction types to download from *AuctionMaestro Pro* and assign a fund in ***The Raiser’s Edge*** to each transaction type. Because you may not consider it useful to track low-dollar transactions data in ***The Raiser’s Edge***, you can filter the transactions that download, based on the sum total of the transaction type for each constituent.

Configure the transaction download settings

1. On the Configure Integration Settings screen, select the General Transaction Settings tab.



2. In the **Download filters for general auction transaction types** frame, the **AuctionMaestro Pro transaction type** column of the grid displays the transaction and auction types available for download from *AuctionMaestro Pro*. For more information about the transaction types in *AuctionMaestro Pro*, see “AuctionMaestro Pro Transaction Types” on page 19.

   In the **Download?** column, mark the checkbox for each **AuctionMaestro Pro transaction type** to download to ***The Raiser’s Edge***.

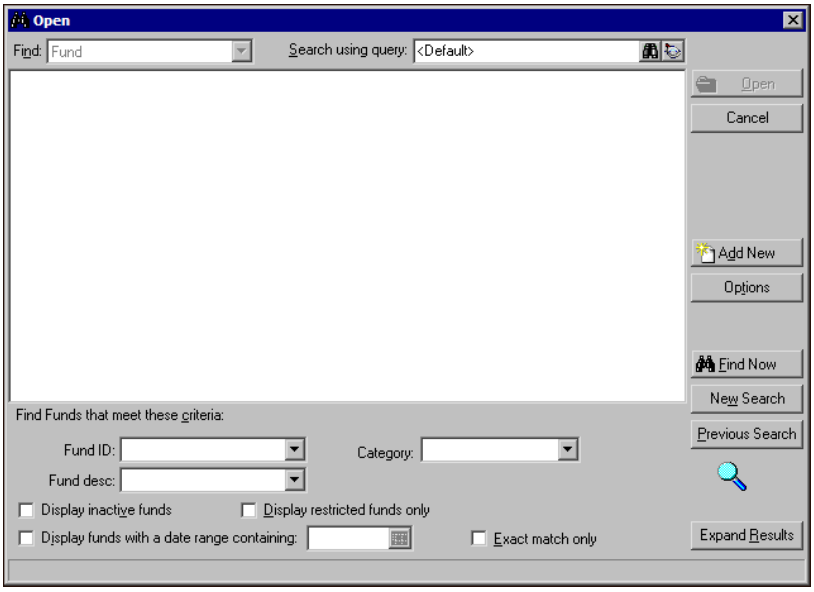
Note: If a **Download?** checkbox is not marked, its **Raiser’s Edge Fund** and **Minimum download amount** fields are disabled.

3. In the **Raiser's Edge Fund** column, enter the fund in ***The Raiser's Edge*** to assign to each transaction type downloaded from *AuctionMaestro Pro*. Select the fund, or search your database in ***The Raiser's Edge*** for the fund. If necessary, assign one fund to multiple transaction types.

   To search your ***Raiser's Edge*** database for the fund:

Note: On the Open screen, if the criteria fields do not provide enough search criteria options, use the **Search using query** field to further filter your results. For more information about this field, see the *Program Basics Guide*.

   a. In the **Raiser's Edge Fund** column, click the binoculars. The Open screen for funds appears.



   b. Under **Find Funds that meet these criteria**, specify the criteria to use to search for your fund in the appropriate criteria fields.

      You can include the fund ID, category, and description, and select whether to display inactive funds, restricted funds only, or funds with a specified date range. You can also select to search for exact match only.

   c. Click **Find Now**. If the search criteria entered matches a fund in the database, it appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find multiple records.

   d. In the grid, select the fund and click **Open**. You return to the General Transaction Settings tab of the Configure Integration Settings screen. In the **Raiser's Edge Fund** column, the selected fund appears.

4. In the **Minimum download amount is greater than or equal to** column, enter the amount by which to filter each transaction type downloaded from *AuctionMaestro Pro*. To download all transactions of a certain type, enter "$0.00".

   Only transaction types with a sum total greater than or equal to the value in this column appear in ***The Raiser's Edge***. Donations are filtered by the sum of their fair market values. All other transactions are filtered by their purchase price.

5. Click **Next** or select the Fund-an-Item Settings tab. The Fund-an-Item Settings tab appears. For information about this tab, see "Fund-an-Item Settings Tab" on page 20.

AuctionMaestro Pro Transaction Types

In *AuctionMaestro Pro*, a transaction description describes the reason for a fee or payment transaction. On the Auction Type Setup screen, you select an auction type for each transaction, such as a cash donation or merchandise purchased through the MaestroSoft Store.

On the General Transaction Settings tab of the Configure Integration Settings screen in ***The Raiser's Edge***, you assign a fund in ***The Raiser's Edge*** to each *AuctionMaestro Pro* transaction and auction type you download. In the **Auction transaction types** frame, the **AuctionMaestro Pro transaction type** column of the grid displays all transaction and auction types available to download from *AuctionMaestro Pro*.

Auction purchases. An auction purchase transaction is the amount of money a participant pays to buy an item at an auction event.

Auction Type $: Merchandise. In *AuctionMaestro Pro*, all items, or merchandise, bought through the MaestroSoft Store are assigned an auction type of "$". These items include t-shirts, caps, and raffle tickets. Items assigned an auction type of "$" are not tax-deductible.

Note: In ***The Raiser's Edge***, a "donation" can be an additional gift of cash or a gift-in-kind donated to an event.

Donation (items donated for auction). In *AuctionMaestro Pro*, a donation is an item donated by a person for auction. In ***The Raiser's Edge***, these items are referred to as "gifts-in-kind".

Sponsorships. In *AuctionMaestro Pro*, you sell sponsorships to help raise money for an auction event. Examples of sponsorships include cash donations, advertising, and payments to cover the registration fees for a table.

Registration fees. A registration fee transaction is the amount of money a participant pays to attend your event.

In *AuctionMaestro Pro*, Fund-an-Item transactions are assigned an auction type of "?". When you configure *AuctionMaestro Pro Integration*, you can specify how to handle these transactions on the Fund-an-Item Settings tab. For more information about this tab, see "Fund-an-Item Settings Tab" on page 20.

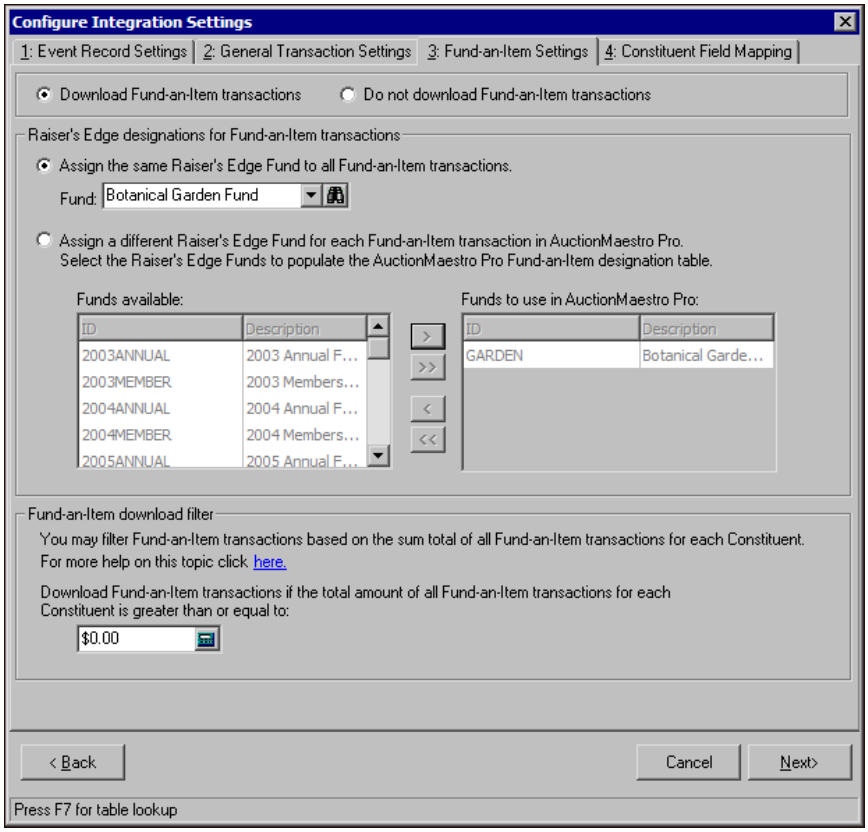
Fund-an-Item Settings Tab

In *AuctionMaestro Pro*, a "Fund-an-Item" transaction is any cash donation given during an event, usually in support of a cause or plea. A Fund-an-Item transaction is often referred to as a "Raise the Paddle" transaction.

On the Fund-an-Item Settings tab, you select whether to download Fund-an-Item transactions from *AuctionMaestro Pro*. If you select to download Fund-an-Item transactions, you can assign one fund to all transactions or different funds to each transaction. Because you may not consider it useful to track low-dollar transaction data in ***The Raiser's Edge***, you can also filter the downloaded Fund-an-Item transactions based on the sum total of the transactions for each constituent.

Configure the Fund-an-Item transaction download settings

1. On the Configure Integration Settings screen, select the Fund-an-Item Settings tab.



2. At the top of the tab, select whether to download Fund-an-Item transactions from *AuctionMaestro Pro*. If you select **Download Fund-an-Item transactions**, the **Raiser's Edge Fund designations for Fund-an-Item transactions** and **Fund-an-Item download filter** frames are enabled.

   If you select **Do not download Fund-an-Item transactions**, go to step 5.

3. In the **Raiser's Edge Fund designations for Fund-an-Item transactions** frame, select the fund in ***The Raiser's Edge*** to assign to Fund-an-Item transactions downloaded from *AuctionMaestro Pro*.

   - To assign the same fund in ***The Raiser's Edge*** to all Fund-an-Item transactions from *AuctionMaestro Pro*, select **Assign the same Raiser's Edge fund to all Fund-an-Item transactions**.

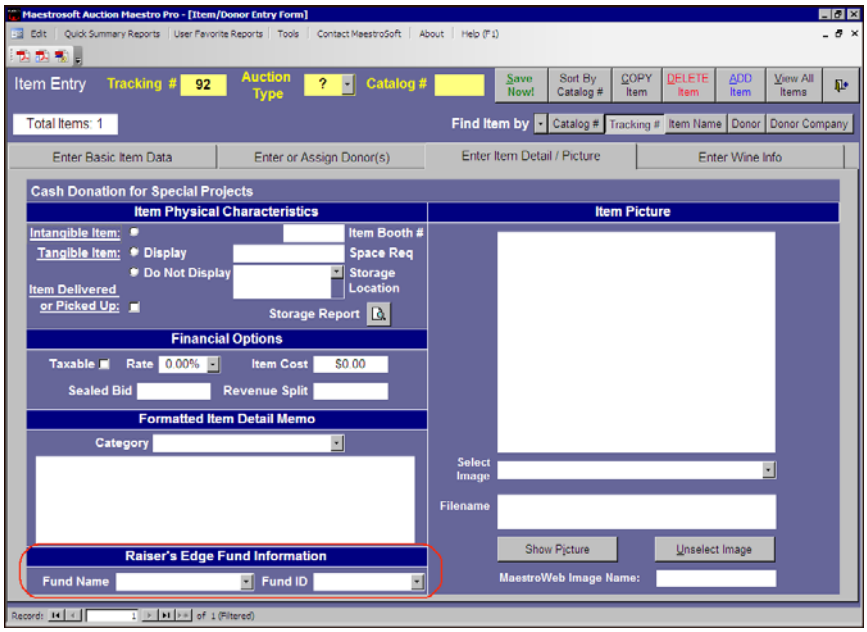
     When you select this option, the **Fund** field is enabled. In the **Fund** field, enter the fund in ***The Raiser's Edge*** to assign to all Fund-an-Item transactions. Select the fund from the drop-down menu or search your database in ***The Raiser's Edge*** for the fund. To search your database for the fund, click the binoculars.

   - To assign a different fund in ***The Raiser's Edge*** to each Fund-an-Item transaction from *AuctionMaestro Pro*, select **Assign a different Raiser's Edge Fund for each Fund-an-Item transaction in AuctionMaestro Pro**.

     When you select this option, the **Funds available** and **Funds to use in AuctionMaestro Pro** boxes are enabled. The **Funds available** box displays all the active funds in ***The Raiser's Edge***. In the **Funds to use in AuctionMaestro Pro** box, specify the funds to assign to Fund-an-Item transactions. To move a fund from the **Funds available** box to the **Funds to use in AuctionMaestro Pro** box, select it and click the right arrow button.

Warning: To download a Fund-an-Item transaction from *AuctionMaestro Pro*, it must have an associated fund in ***The Raiser's Edge***. If you select **Assign a different Raiser's Edge Fund for each Fund-an-Item transaction in AuctionMaestro Pro**, you must select the associated fund in the **Fund Name** field in *AuctionMaestro Pro*. During the download, a Fund-an-Item transaction without an associated fund name creates an exception.

The funds you move to the **Funds to use in AuctionMaestro Pro** box transfer to a table in *AuctionMaestro Pro*. When you enter a Fund-an-Item transaction in *AuctionMaestro Pro*, in the **Raiser's Edge Fund Information** frame on the Enter Item Detail/Picture tab of the Item Entry screen, you can select the associated fund name and ID.



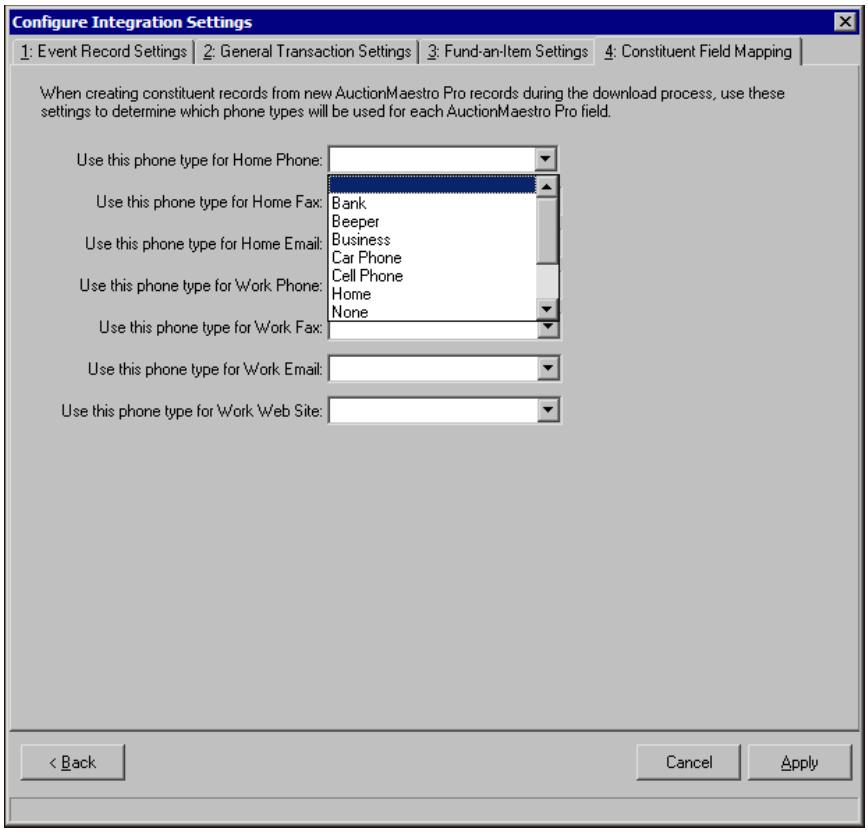
4. In the **Fund-an-Item download filter** frame on the Fund-an-Item Settings tab, enter the amount by which to filter the Fund-an-Item transactions to be downloaded. Only Fund-an-Item transactions with a sum total greater than or equal to the value in the **Download Fund-an-Item transactions if the total amount of all Fund-an-Item transactions for each Constituent is greater than or equal to** field appear in ***The Raiser's Edge***.
   - To download only Fund-an-Item transactions with a sum total greater than or equal to a select value, enter the amount by which to filter Fund-an-Item transactions.
   - To download all Fund-an-Item transactions, enter "$0.00".
5. Click **Next**. The Constituent Field Mapping tab appears. For more information about this tab, see "Constituent Field Mapping Tab" on page 22.

Constituent Field Mapping Tab

When you download information from your people database in *AuctionMaestro Pro*, ***The Raiser's Edge*** creates constituent records for auction participants who purchase an item at your auction event. On the Constituent Field Mapping tab, specify which field in ***The Raiser's Edge*** to use for each phone field on the *AuctionMaestro Pro* people record.

Configure the constituent download settings

1. On the Configure Integration Settings screen, select the Constituent Field Mapping tab.



2. In the **Use this phone type for Home Phone** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Home #** field in *AuctionMaestro Pro*.
3. In the **Use this phone type for Home Fax** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Home Fax** field in *AuctionMaestro Pro*.
4. In the **Use this phone type for Home Email** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Home Email** field in *AuctionMaestro Pro*.
5. In the **Use this phone type for Work Phone** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Work #** field in *AuctionMaestro Pro*.
6. In the **Use this phone type for Work Fax** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Work Fax** field in *AuctionMaestro Pro*.
7. In the **Use this phone type for Work Email** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Work Email** field in *AuctionMaestro Pro*.
8. In the **Use this phone type for Work Web site** field, select the phone type in ***The Raiser's Edge*** to use for data in the **Work Web Site** field in *AuctionMaestro Pro*.
9. To save and transfer your configuration settings, click **Apply**. *AuctionMaestro Pro Integration* transfers the configuration settings to *AuctionMaestro Pro*. It may take up to a minute for the configuration settings to transfer to *AuctionMaestro Pro*. When the transfer is complete, a confirmation message appears.

   If you adjust the configuration settings and try to close the Configure Integration Settings screen without clicking **Apply**, a message appears to ask whether to transfer the configuration settings. To save and transfer the settings to *AuctionMaestro Pro*, click **Yes**.

Warning: If the transfer is unsuccessful, a message appears. Click **OK** and make sure the databases in *AuctionMaestro Pro* are properly configured and at the specified location. For more information about database configuration, see “Configure Databases” on page 11.

10. Click **OK**. You return to the Configure Integration Settings screen.
11. Click the “X” in the upper right corner of the Configure Integration Settings screen. You return to the AuctionMaestro Integration page.

Transfer Constituents to AuctionMaestro Pro

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Note: To transfer constituent data to *AuctionMaestro Pro*, the user must have security privileges related to "Transfer Constituents to AuctionMaestro Pro". If the user does not have security privileges, the **Transfer Constituents to AuctionMaestro Pro** link on the AuctionMaestro Pro Integration page is disabled. For more information about security in *AuctionMaestro Pro Integration*, see "AuctionMaestro Pro Integration Security" on page 2.

With *AuctionMaestro Pro Integration*, you transfer constituent data in ***The Raiser's Edge*** to a people database in *AuctionMaestro Pro*. Before you transfer constituent data, you must specify the location of the *AuctionMaestro Pro* people database and configure the data transfer settings. For more information about database configuration, see "Configure Databases" on page 11.

Before you transfer constituent data to *AuctionMaestro Pro*, you must first select the records to consider for transfer and determine how the data transfers. You do this from the Transfer Constituents to AuctionMaestro Pro screen. For more information about the options on this screen, see "Transfer Constituents to AuctionMaestro Pro" on page 26.

After you specify the data to transfer and in what format, you can easily transfer the constituent data from ***The Raiser's Edge*** to the specified people database in *AuctionMaestro Pro*. For more information about how to transfer constituent data, see "Constituent Data Transfer Procedure" on page 37.

Transfer Constituents to AuctionMaestro Pro

To transfer constituent data to *AuctionMaestro Pro*, on the AuctionMaestro Pro Integration page, click **Transfer Constituents to AuctionMaestro Pro**. The Transfer Constituents to AuctionMaestro Pro screen opens to the General tab.

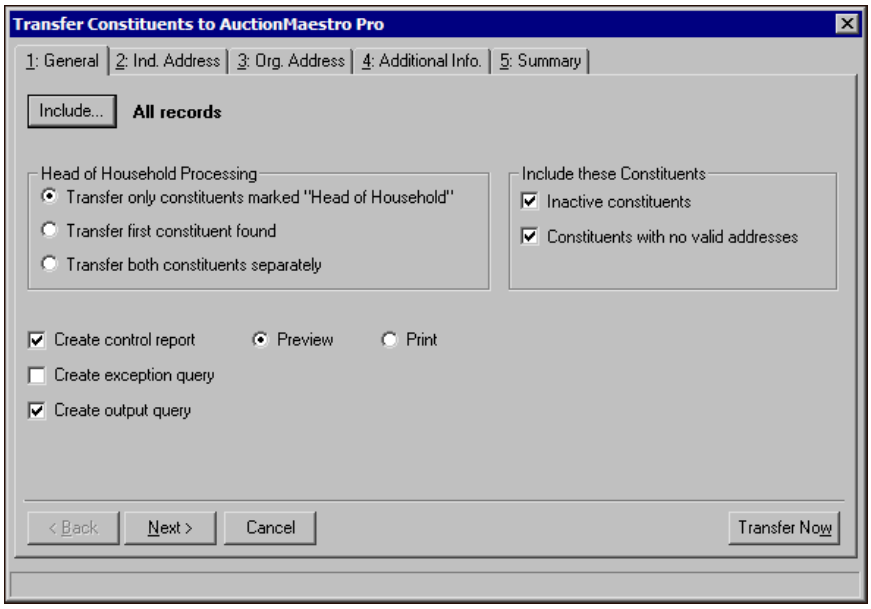
On the Transfer Constituents to AuctionMaestro Pro screen, you select the records to consider for transfer, determine how constituent data transfers, and view a summary of your transfer criteria. The Transfer Constituents to AuctionMaestro Pro screen consists of five tabs.

General Tab

On the General tab, you determine the records to consider for data transfer from ***The Raiser's Edge*** to *AuctionMaestro Pro*. You can select to transfer data from all records in your database, selected records using a query, or one record from your database. On this tab, you also define other preferences for the data transfer, such as how to process constituents who are marked as **Head of Household**, are inactive, or have no valid address.

Select the constituents to transfer

1. From the AuctionMaestro Pro Integration page, click **Transfer Constituents to AuctionMaestro Pro**. The Transfer Constituents to AuctionMaestro Pro screen opens to the General tab.



2. Click **Include** and select the records to include in the data transfer.
   - **All Records** – To consider all constituent records in your database in ***The Raiser's Edge*** for the data transfer, select **All Records**.
   - **Selected Records** – To use a query to select the constituent records in your database in ***The Raiser's Edge*** for the data transfer, select **Selected Records**. The Open Query screen appears. Select a query type of "Constituent", "Individual", or "Organization". For more information about the Open Query screen, see the *Query and Export Guide*.
   - **One Record** – To select a specific constituent record in your database in ***The Raiser's Edge*** for the data transfer, select **One Record**. The Open screen appears so you can search the database for the constituent. For more information about the Open screen, see the *Program Basics Guide*.

Note: Use the **Head of Household Processing** frame only when you include both people of the household in the transfer. If you select **Transfer only constituents marked "Head of Household**" and both people are eligible for the transfer, only the person marked **Head of Household** transfers. If only the person not marked **Head of Household** is eligible for the transfer, that person transfers.

3. In your database, you may have separate constituent records for two constituents who are married to or live with each other. In the **Head of Household Processing** frame, select whether to transfer one constituent or both.
   - **Transfer only constituents marked "Head of Household"** – To transfer only the constituent with **This individual is the "Head of Household"** marked on the **Spouse** button of the constituent record, select this option.
   - **Transfer first constituent found** – To transfer only the first constituent of the household found, select this option.
   - **Transfer both constituents separately** – To transfer both constituents, select this option.
4. In the **Include these Constituents** frame, select whether to include constituents who are inactive or have no valid address in the transfer.

Note: A control report summarizes the transfer's characteristics and field criteria. We recommend you print a control report to retain for your records.

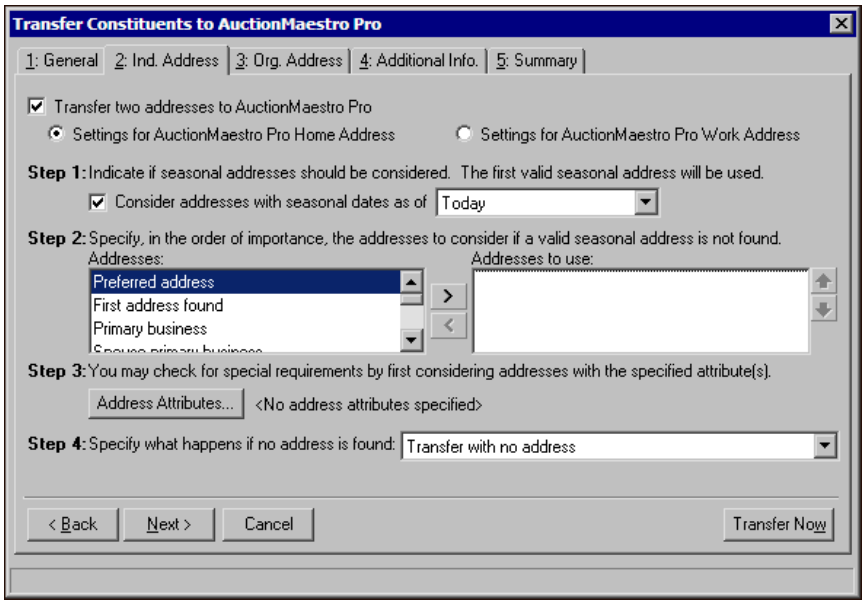
5. To create a control report for the constituent transfer, mark **Create control report** and select whether to preview or print the control report.
6. To generate an exception report to list the constituent records that do not transfer, mark **Create exception report**.
7. To save the records included in the transfer in a query file, mark **Create output query**.
8. Click **Next**. The Ind. Address tab opens. For information about the Ind. Address tab, see "Ind. Address Tab" on page 28.

Ind. Address Tab

On the Ind. Address tab, you determine the address data to transfer from an individual constituent record. During the transfer, ***The Raiser's Edge*** selects an address for each individual constituent record included. When the program selects an address, it can consider seasonal addresses, address attributes, and specific address types. On the Ind. Address tab, you select an alternate address for ***The Raiser's Edge*** to use if it cannot find a valid preferred address for a constituent. To make sure your transfer includes the address data you need, you must complete the information in all four steps.

- **Select the individual constituent address data to transfer**

1. On the Transfer Constituents to AuctionMaestro Pro screen, select the Ind. Address tab.



Note: If you do not mark **Transfer two address to AuctionMaestro Pro**, only the home address data transfers.

2. To transfer two addresses from the constituent record to *AuctionMaestro Pro*, such as both the home and work addresses, mark **Transfer two addresses to AuctionMaestro Pro**.

   When you mark this checkbox, the **Settings for AuctionMaestro Pro Home address** and **Settings for AuctionMaestro Pro Work address** options are enabled.
3. Select **Settings for AuctionMaestro Pro Home address**.

Note: If no valid seasonal address is found, the address types you select in the **Step 2** frame are included in the data transfer.

4. In the **Step 1** frame, select whether to consider seasonal addresses in the transfer. To consider seasonal addresses, mark **Consider addresses with seasonal dates as of**. In the corresponding field, select the date to start accepting seasonal addresses. When you mark this checkbox and select a date, the first valid season address found for the constituent transfers.

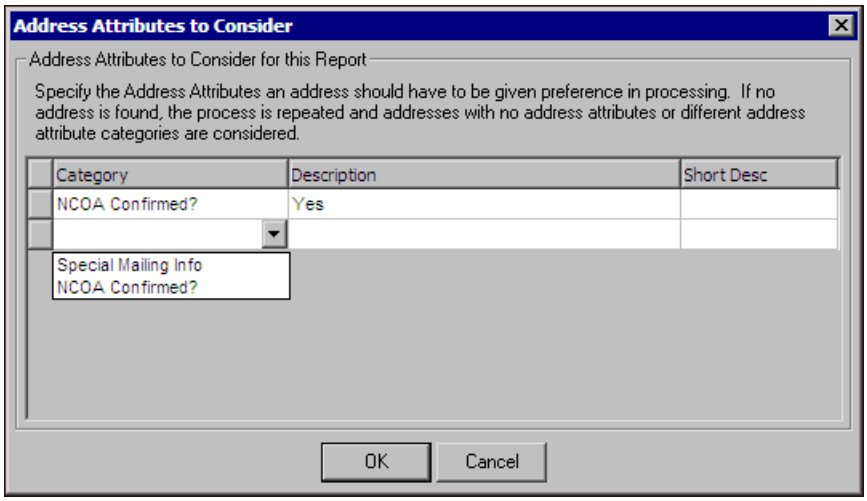
Note: If, in the **Step 2** frame, you select to use the Preferred address, **Send Mail to Home** is marked in *AuctionMaestro Pro* during the transfer.

5. In the **Step 2** frame, specify the address types to consider for transfer if no valid seasonal address is found or if you select to not consider seasonal addresses in the transfer. To specify the address types to consider for transfer, select the address type in the **Addresses** box and click the single right arrow to move it to the **Addresses to use** box.

   If you list multiple address types in the **Addresses to use** box, arrange them in the order of preference. To arrange the address types in the **Addresses to use** box, select the address type to move and click the up or down arrow to change its order in the list.

Note: NCOA is an address correction service that works with Blackbaud's **NCOA On-Demand**. For more information about NCOA, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

6. In the **Step 3** frame, use attributes to refine the address data included in the transfer. For example, to avoid outdated or incorrect addresses, select to include only National Change of Address (NCOA) confirmed addresses. To select the address attributes to consider for transfer:
   a. Click **Address attributes**. The Address Attributes to Consider screen appears.



   b. In the grid, select the attribute **Category** and **Description** to include in each address. You can select to include multiple attributes.
   c. Click **OK**. You return to the Transfer Constituents to AuctionMaestro Pro screen. Next to the **Address attributes** button, "Yes" appears.
7. In the **Step 4** frame, select the address type to use if the address types specified in the **Step 1**, **Step 2**, and **Step 3** frames are not found. Select "Transfer with no address" or "Transfer specific address".

   If you select "Transfer with specific address", the **Address to transfer** field appears. Select the address type to transfer.
8. When you mark **Transfer two addresses to AuctionMaestro Pro**, select **Settings for AuctionMaestro Pro Work address**, and repeat the **Step 1**, **Step 2**, **Step 3**, and **Step 4** frames to define how to transfer data to the work address in *AuctionMaestro Pro*.

9. Click **Next**. The Org. Address tab opens. For information about the Org. Address tab, see “Org. Address Tab” on page 30.

Org. Address Tab

On the Org. Address tab, you select the address data to transfer from an organization constituent record. During the transfer, ***The Raiser’s Edge*** selects an address for each organization constituent record included. When the program selects an address, it can consider the organization’s address or the organization contact’s address. On the Org. Address tab, you select an alternate address for ***The Raiser’s Edge*** to use if it cannot find a valid preferred address for a constituent. To make sure your transfer includes the address data you need, you must complete the information in all the steps. Depending on whether you transfer the organization’s address or the contact’s address, ***The Raiser’s Edge*** selects an address to transfer for each constituent using three or four steps.

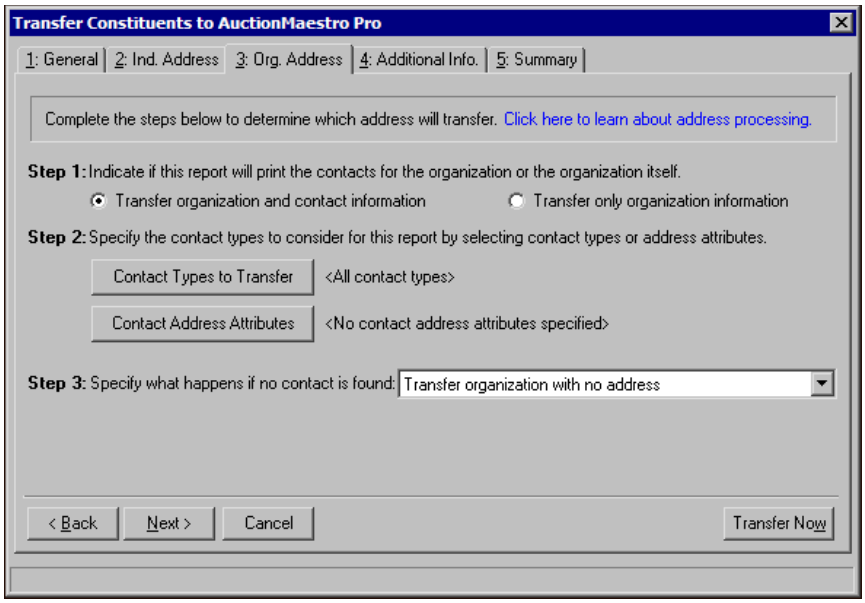
- To transfer the contact’s address, see “Transfer the organization contact address data” on page 30.
- To transfer the organization’s address, see “Transfer the organization constituent address data” on page 32

Transfer the organization contact address data

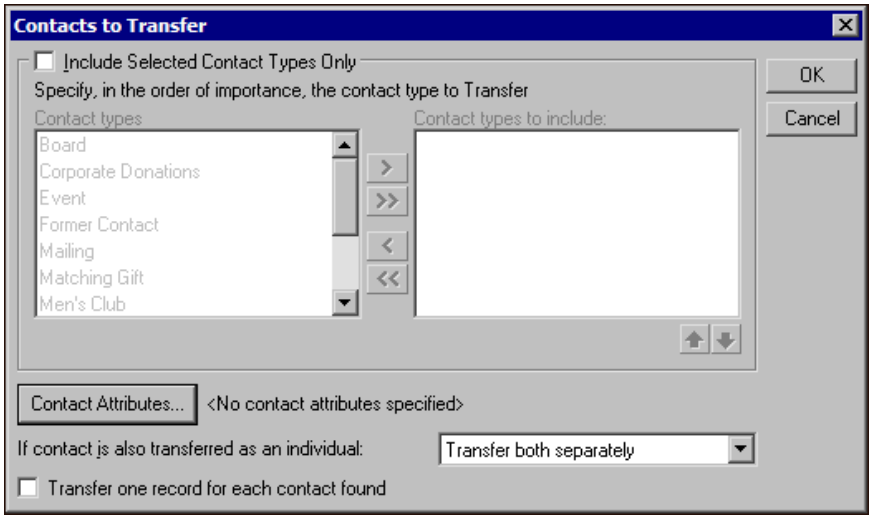
1. On the Transfer Constituents to AuctionMaestro Pro screen, select the Org. Address tab.

Note: To transfer only the organization’s address data, select **Transfer only organization information**. For information about how to transfer the organization address, see “Transfer the organization constituent address data” on page 32.

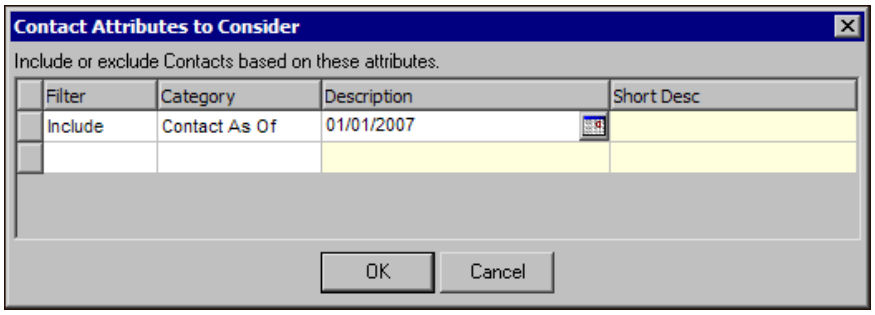
2. In the **Step 1** frame, select **Transfer organization and contact information**.



3. In the **Step 2** frame, select the contact types to consider for transfer. Click **Contact Types to Transfer**. The Contacts to Transfer screen appears.

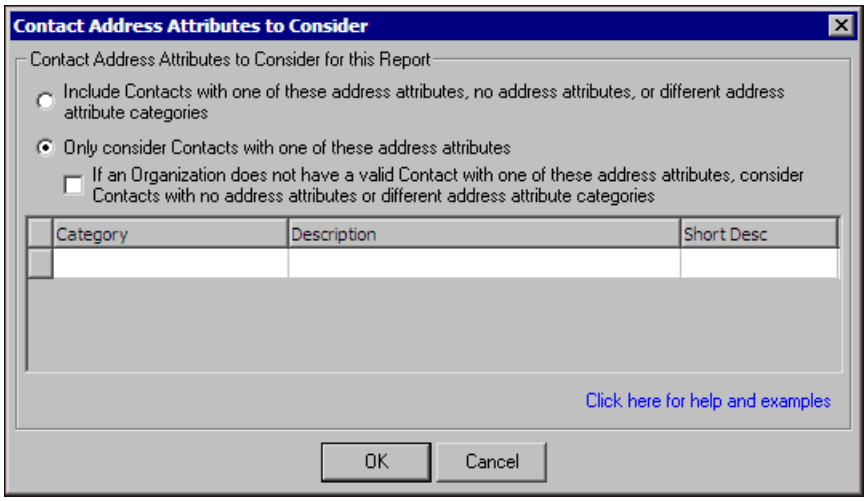


4. Select the contact types to consider for the transfer.
   - To include all contact types, do not mark Include Selected Contact Types only. The program automatically considers all contact types for the transfer.
   - To select specific contact types, mark **Include Selected Contact Types only**. To select the contact types to transfer, select each contact type in the **Contact Types** box and click the right arrow to move it to the **Contact types to include** box.
5. If you list multiple contact types in the box on the right, sort them in the order of importance. To move a contact type within the box, select the contact type and click the up or down arrow.
6. To filter the contact attributes, click **Contact Attributes**. The Contact Attributes to Consider screen appears.



   To include or exclude constituents based on filters, use the **Filter**, **Category**, **Description**, and **Short Desc** columns.
7. To save the changes, click **OK**. You return to the Contact Types to Transfer screen.
8. In the **If contact is also transferred as an individual** field, select how to transfer the address if the contact can also be transferred as an individual. Select “Transfer the individual address only”, “Transfer the contact address only”, or “Transfer both separately”.
9. To transfer more than one contact’s address data, mark **Transfer one record for each contact found**. If you do not mark this checkbox, the address data of the first contact that meets the address criteria is transferred.
10. After you select all the contact types to transfer, click **OK**. You return to the Org. Address tab. The contact types you select appear to the right of the **Contact Types to Include** button. If you do not select any contact types, “<All contact types>” appears.

11. In the **Step 2** frame, include or exclude contacts' addresses based on address attributes entered on the contact's address record.
    a. Click **Contact Address Attributes**. The Contact Address Attributes to Consider screen appears.



    b. Select whether to include contacts with a specific address attribute, no address attributes, or different address attributes or only contacts with a specific address attribute. Your selection depends on how you enter and use address attributes in your database.
    c. Click **OK**. You return to the Org. Address tab. The selected address attributes appear to the right of the **Contact Address Attributes** button. If you do not specify an address attribute, "<No attributes specified>" appears.
12. In the **Step 3** frame, select what ***The Raiser's Edge*** should do if it cannot find a contact address that meets your selections in the **Step 1** and **Step 2** frames. Select "Transfer organization with no address", "Remove record from transfer", or "Transfer specific organization address".

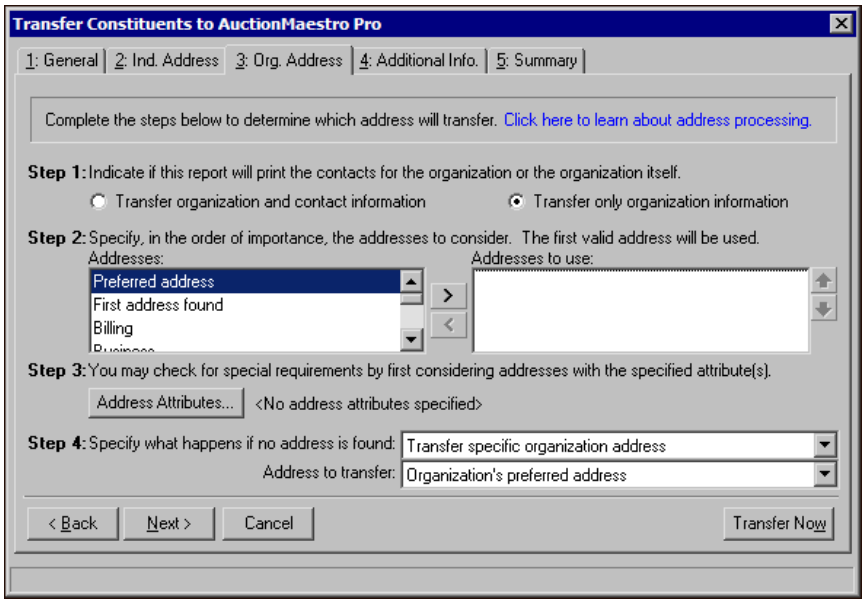
    If you select "Transfer specific organization address", the **Address to transfer** field appears. Select the address type to transfer.
13. Click **Next**. The Additional Info tab opens. For more information about the Additional Info tab, see "Additional Info. Tab" on page 34.

Transfer the organization constituent address data

1. On the Transfer Constituents to AuctionMaestro Pro screen, select the Org. Address tab.

Note: To transfer the organization contact's address data, select **Transfer organization and contact information**. For more information, see "Transfer the organization contact address data" on page 30.

2. In the **Step 1** frame, select **Transfer only organization information**.



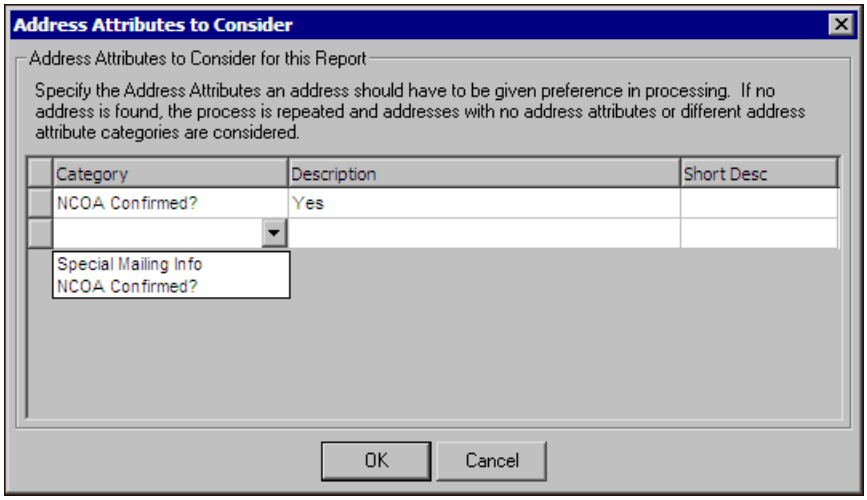
3. In the **Step 2** frame, specify the address types to consider for transfer. To specify the address types to consider for transfer, select the address type in the **Addresses** box and click the single right arrow to move it to the **Addresses to use** box.

   If you list multiple address types in the **Addresses to use** box, arrange them in the order of preference. To arrange the address types in the **Addresses to use** box, select the address type and click the up or down arrow to change its order in the list.

Note: NCOA is an address correction service that works with Blackbaud's **NCOA On-Demand**. For more information about NCOA, see the Address Correction Services chapter in the *Data Enrichment Services Guide*.

4. In the **Step 3** frame, use attributes to refine the address data included in the transfer. For example, to avoid outdated or incorrect addresses, select to include only National Change of Address (NCOA) confirmed addresses. To select the address attributes to consider for transfer:

   a. Click **Address attributes**. The Address Attributes to Consider screen appears.



   b. In the grid, select the attribute category and description to include in each address. If required, select to include multiple attributes.

c. Click **OK**. You return to the Transfer Constituents to AuctionMaestro Pro screen. Next to the **Address attributes** button, “Yes” appears.

5. In the **Step 4** frame, select the address type to use if the address types specified in the **Step 1**, **Step 2**, and **Step 3** frames are not found. Select “Transfer with no address” or “Transfer specific address”.

   If you select “Transfer with specific address”, the **Address to transfer** field appears. Select the address type to transfer.

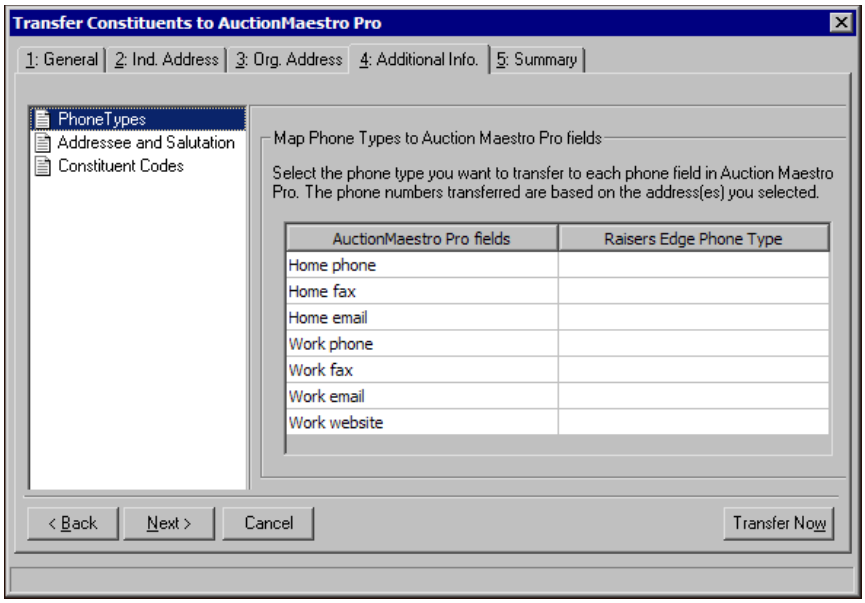
6. Click **Next**. The Additional Info tab opens. For information about the Additional Info tab, see “Additional Info. Tab” on page 34.

Additional Info. Tab

On the Additional Info. tab, you specify how to transfer each phone type in ***The Raiser’s Edge*** to phone fields in *AuctionMaestro Pro*. You also select which addressee and salutation to transfer from constituent records in ***The Raiser’s Edge***. On the Additional Info. tab, you select which alternate addressee and salutation for ***The Raiser’s Edge*** to use if it cannot find a valid preferred addressee or salutation for a constituent. You also select which constituent codes transfer from ***The Raiser’s Edge*** to filter fields in *AuctionMaestro Pro* and whether to include inactive constituent codes.

- **Select how to transfer phone, addressee, salutation, and constituent code data**

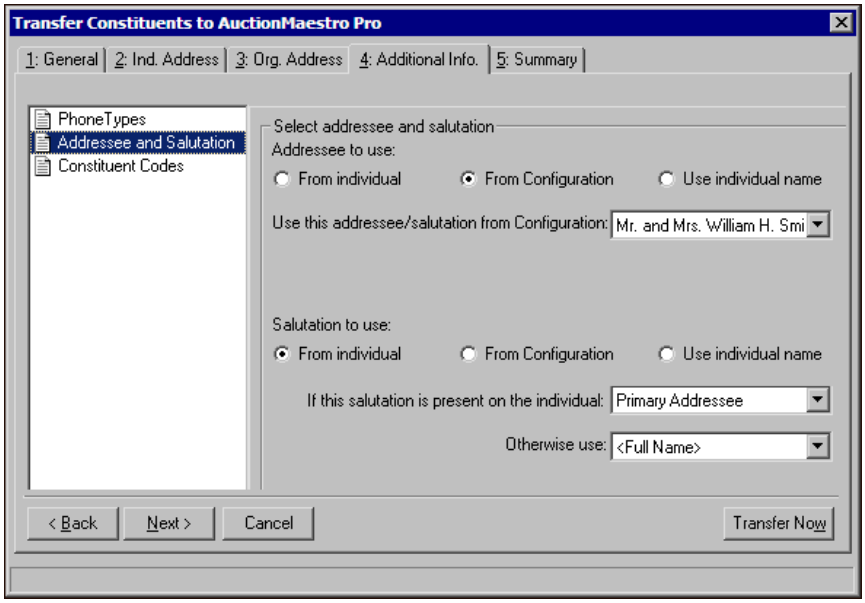
1. On the Transfer Constituents to AuctionMaestro Pro screen, select the Additional Info. tab.
2. In the box on the left, select **Phone Types**. The **Map Phone Types to AuctionMaestro Pro fields** frame appears.



3. In the **Map Phone Types to AuctionMaestro Pro fields** frame, select the phone types in ***The Raiser’s Edge*** to transfer to each phone field in *AuctionMaestro Pro*. The phone numbers that transfer are based on the addresses you select.

   In the **AuctionMaestro Pro fields** column, the phone fields from *AuctionMaestro Pro* appear. In the **Raiser’s Edge Phone Type** column, select the phone type to transfer to each phone field in *AuctionMaestro Pro*.

4. In the box on the left, select **Addressee and Salutation**. The **Select addressee and salutation** frame appears.



5. In the **Select addressee and salutation** frame, specify the addressee and salutation to transfer from the constituent records. In the **Addressee to use** field, select the established addressee format to use.
   - **From individual** – To select the format entered on the constituent record, select this option.
   - **From Configuration** – To select the format entered in the **Addressee/Salutations** link in *Configuration*, select this option. When you select this option, the **Use this Addressee from Configuration** field appears. Select the addressee format to use for the transfer.
   - **Use individual name** – To transfer the name as entered in the **First name**, **Middle name**, and **Last name** fields of the constituent record, select this option. If you select this option, the remaining fields under **Addressee to use** are disabled.
6. If you select "From individual", in the **If this addressee is present on the individual** field, select the addressee format to use for the selected **Addressee to use**. ***The Raiser's Edge*** checks the Addressees/Salutations tab of the constituent record to determine whether the selected format is used.

Note: If neither selected addressee is used on the constituent record, the **First name**, **Middle name**, and **Last name** transfer as they are entered in the name fields on the constituent record.

   In the **Otherwise use** field, select the addressee format to use if the selected addressee format is not used on the constituent record.
7. If you select "From Configuration", in the **Use this addressee/salutation from Configuration** field, select the salutation format to use for the selected **Address to use**.
8. In the **Salutation to use** field, select the established salutation format to use.
   - **From individual** – To select the format entered on the constituent record, select this option.
   - **From Configuration** – To select the format entered in the **Addressees/Salutations** link in *Configuration*, select this option. When you select this option, the **Use this Salutation from Configuration** field appears. Select the salutation format to use for the transfer.
   - **Use individual name** – To transfer the name as entered in the **First name**, **Middle name**, and **Last name** fields of the constituent record, select this option. If you select this option, the remaining fields under **Addressee to use** are disabled.

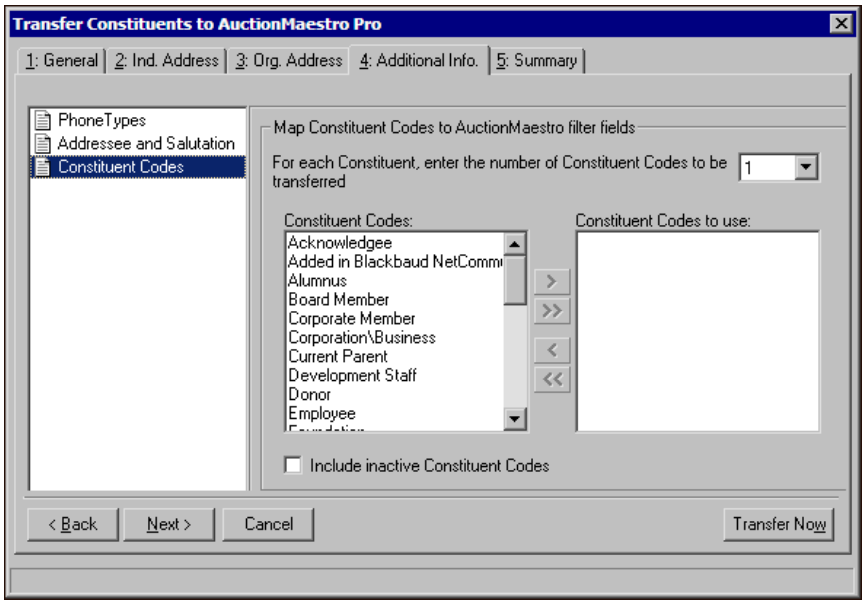
9. If, in the **Salutation to use** field, you select "From individual", in the **If this salutation is present on the individual** field, select the salutation format to use for the selected **Salutation to use**. ***The Raiser's Edge*** checks the Addressees/Salutations tab of the constituent record to determine whether the selected format is used.

   In the **Otherwise use** field, enter an alternate format to use if the first salutation format selected is not used on the constituent record.

10. If, in the **Salutation to use** field, you select "From Configuration", in the **Use this addressee/salutation from Configuration** field, select the salutation format to use for the selected **Address to use**.

Note: To not transfer constituent codes to the four filter fields in *AuctionMaestro Pro*, do not select **Constituent Codes** in the box on the left. To view a summary of the transfer settings, click **Next** or select the Summary tab.

11. To transfer constituent codes from ***The Raiser's Edge*** to the four filter fields in *AuctionMaestro Pro*, select **Constituent Codes** in the box on the left. The **Map Constituent Codes to AuctionMaestro Pro filter fields** frame appears.



12. In the **Map Constituent Codes to AuctionMaestro Pro filter fields** frame, select the constituent codes in ***The Raiser's Edge*** to transfer to the filter fields in *AuctionMaestro Pro*. Transferred constituent codes appear in the people records' filter fields and the filter table in *AuctionMaestro Pro*.

    In the **For each Constituent, enter the number of Constituent Codes to be transferred** field, select how many constituent codes to transfer. You can select to transfer up to four constituent codes. If you select "1" or higher, the **Constituent Codes** and **Constituent Codes to use** boxes are enabled.

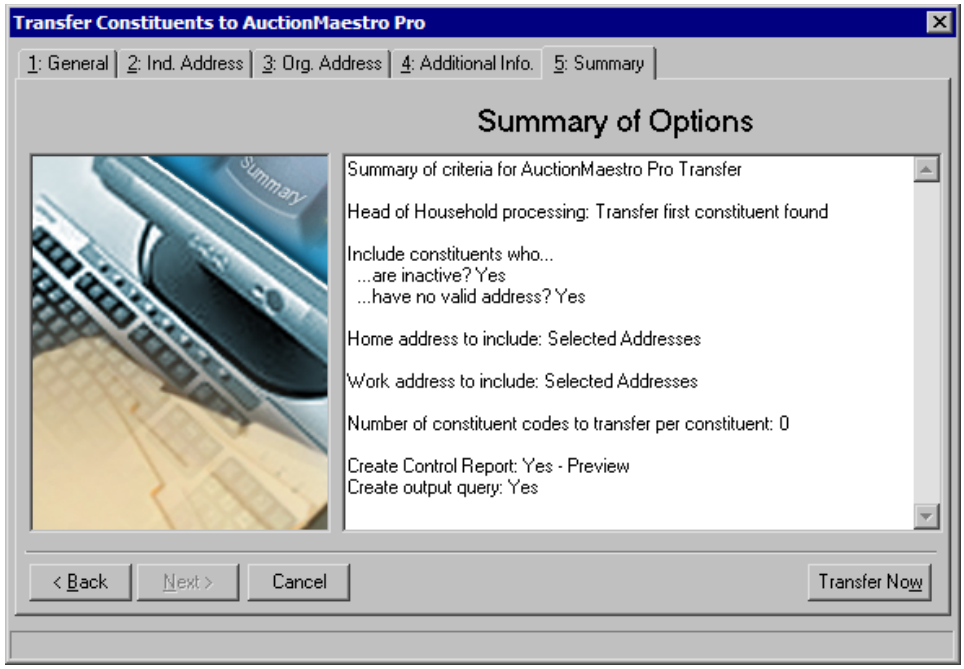
13. If you select to transfer at least one constituent code, the **Constituent Codes** box lists all active constituent codes. To include inactive constituent codes in the list, mark **Include inactive Constituent Codes**.

14. To specify the constituent codes to consider for transfer, select the constituent code in the **Constituent Codes** box and click the single right arrow to move it to the **Constituent Codes to use** box.

15. Click **Next**. The Summary tab opens. For information about the Summary tab, see "Summary Tab" on page 37.

Summary Tab

The Summary tab displays a summary of options selected on the tabs of the Transfer Constituents to AuctionMaestro Pro screen. To view the summary, select the Summary tab on the Transfer Constituents to AuctionMaestro Pro screen.



Before you transfer constituent data from ***The Raiser's Edge*** to your people database in *AuctionMaestro Pro*, review the **Summary of Options** box and make sure the criteria selected is correct. To adjust any selected option, click **Back** or select the applicable tab.

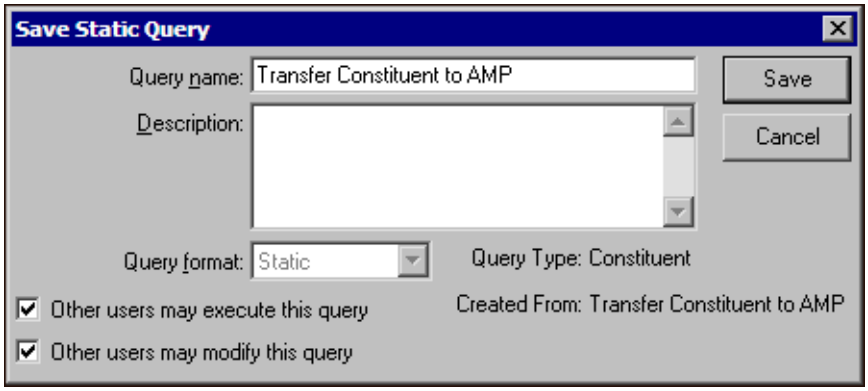
Constituent Data Transfer Procedure

On the AuctionMaestro Pro Integration page, you can transfer constituent data in ***The Raiser's Edge*** to a specified people database in *AuctionMaestro Pro*. This helps prevent data entry personnel from entering duplicate data into the two different databases.

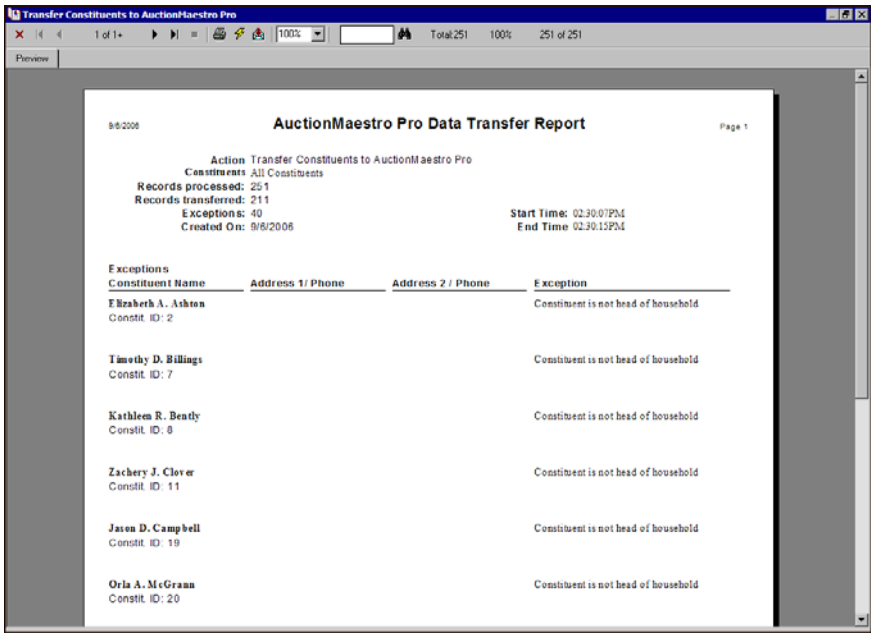
- **Transfer constituent data to AuctionMaestro Pro**

  1. On the AuctionMaestro Pro Integration page, click **Transfer Constituents to AuctionMaestro Pro**. The Transfer Constituents to AuctionMaestro Pro screen appears.
  2. On the tabs of the Transfer Constituents to AuctionMaestro Pro screen, select the constituent records to transfer and determine how the data transfers. For information about the Transfer Constituents to AuctionMaestro Pro screen, see "Transfer Constituents to AuctionMaestro Pro" on page 26.
  3. Select the Summary tab and review the **Summary of Options** box to make sure the criteria selected is correct. For information about the Summary tab, see "Summary Tab" on page 37.
  4. Verify Maestrosoft *AuctionMaestro Pro* is open on the workstation.
  5. Click **Transfer now**.
  6. If, on the General tab, you select **Create output query**, the Save Static Query screen appears so you can specify the query to create for storage.

In the **Query name** and **Description** fields, enter a name and description to help identify the query. Select whether **Other users may execute this query** or **Other users may modify this query** and click **Save**.



7. If, on the General tab, you select **Create control report**, the control report is generated and lists the constituent records transferred to *AuctionMaestro Pro*.



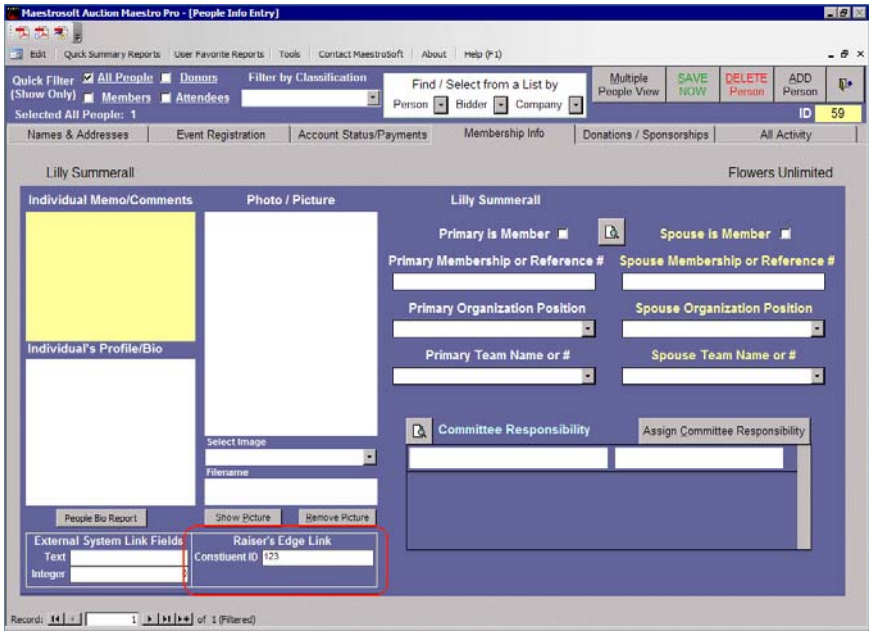
To close the control report and return to the Summary tab, click the red "X" in the upper left corner.

Warning: If the transfer is not successful, a message appears to inform you that the transfer failed. If the transfer is unsuccessful, no constituent data transfers to *AuctionMaestro Pro*. For a transfer to succeed, the *AuctionMaestro Pro* database must be correctly configured at the location specified. For more information about *AuctionMaestro Pro* database configuration, see "AuctionMaestro Pro Integration Configuration" on page 9.

8. The constituent data begins to transfer to the specified people database in *AuctionMaestro Pro*. If, on the Event Record Settings tab of the Configure Integration Settings screen, you select **Associate a Raiser's Edge Event record with the current AuctionMaestro Pro auction databases**, the event record data selected in the **Select Event record data to be transferred** frame also begins to transfer to *AuctionMaestro Pro*.

   The data transfer may take some time. During the data transfer, a progress bar appears to display the transfer activity. When the transfer is complete, a message appears to inform you that the transfer was successful.

On the Membership Info tab of an *AuctionMaestro Pro* people record created from constituent information transferred from ***The Raiser's Edge***, the **Constituent ID** from the ***Raiser's Edge*** constituent record appears in the **Raiser's Edge Link** frame.



Download Transactions from AuctionMaestro Pro

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Procedures

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Note: To download transaction data from *AuctionMaestro Pro*, the user must have security privileges related to "Download transactions from AuctionMaestro Pro". If the user does not have security privileges, the **Download transactions from AuctionMaestro Pro** link appears on the AuctionMaestro Pro Integration page but is disabled. For more information about security privileges, see "AuctionMaestro Pro Integration Security" on page 2.

With *AuctionMaestro Pro Integration*, you can download transaction data from your auction database in *AuctionMaestro Pro* to gift records in ***The Raiser's Edge***. Before you download transaction data, you must specify the location of the *AuctionMaestro Pro* auction database and configure the transaction download settings. For more information about database configuration, see "AuctionMaestro Pro Integration Configuration" on page 9.

When you download transactions from *AuctionMaestro Pro*, all transaction types download at once, including auction registration fees, auction sponsorships, auction procurements, outright cash donations, and auction night purchases. Once you download the transactions from *AuctionMaestro Pro*, ***The Raiser's Edge*** creates a batch of the downloaded transactions. From *Batch*, you commit the downloaded transactions to your database. For more information about how to download transactions from *AuctionMaestro Pro* to your database in ***The Raiser's Edge***, see "Download Transactions from AuctionMaestro Pro" on page 42.

After you download the transactions from *AuctionMaestro Pro*, you can view the original *AuctionMaestro Pro* transaction details of the gift record generated in ***The Raiser's Edge***. For more information about how to view *AuctionMaestro Pro* details from a ***Raiser's Edge*** gift record, see "View AuctionMaestro Pro Transaction Details from The Raiser's Edge" on page 46.

Download Transactions from AuctionMaestro Pro

Note: Only one user can access the download transactions function at a time. If you attempt to download an auction's transactions the same time as another user, a message appears to inform you that another user is downloading transactions. To return to the AuctionMaestro Pro Integration page, click **OK**.

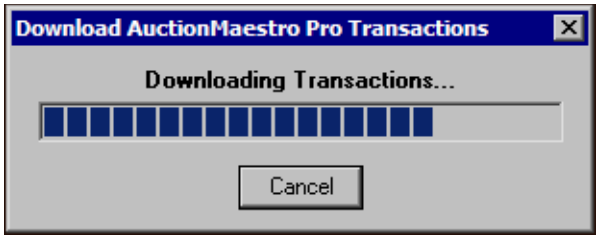
To download transaction data from *AuctionMaestro Pro*, from the AuctionMaestro Pro Integration page, click **Download transactions from AuctionMaestro Pro**. The Download Donations screen appears. On the Download Donations screen, you link transactions as gifts to constituent records in your ***Raiser's Edge*** database. You can search your database for existing constituents or add new constituent records as necessary. On this screen, you also generate the batch file of the transactions downloaded from *AuctionMaestro Pro*.

Only specific information is updated on transaction records. If a downloaded transaction record changes in *AuctionMaestro Pro*, you must manually update the corresponding gift record in ***The Raiser's Edge***. To help prevent having to update gift records in ***The Raiser's Edge***, we recommend you download only when all the auction's transactions are finalized in *AuctionMaestro Pro*.

- **Download transactions from AuctionMaestro Pro**

Warning: If you click **Download Transactions from AuctionMaestro Pro** before you configure the databases and assign ***Raiser's Edge*** funds for each *AuctionMaestro Pro* transaction, a message appears to inform you of what you must do before you can download transactions. Click **OK**.

1. From the AuctionMaestro Pro Integration page, click **Download transactions from AuctionMaestro Pro**. ***The Raiser's Edge*** begins to download the new auction transactions from the connected databases in *AuctionMaestro Pro*.



   If, on the Event Record Settings tab of the Configure Integration Settings screen, you mark **Create participant records when downloading transactions** in the **Create participant records** frame, ***The Raiser's Edge*** creates participant records for each record downloaded from the people database in *AuctionMaestro Pro* when you commit the batch file to the database.

Note: If the download is not successful, a message appears to inform you that the download failed and the reason why. For a download to succeed, the *AuctionMaestro Pro* database must be correctly configured at the location specified and the transaction types correctly configured. For more information about *AuctionMaestro Pro* database configuration, see "Configure Databases" on page 11.

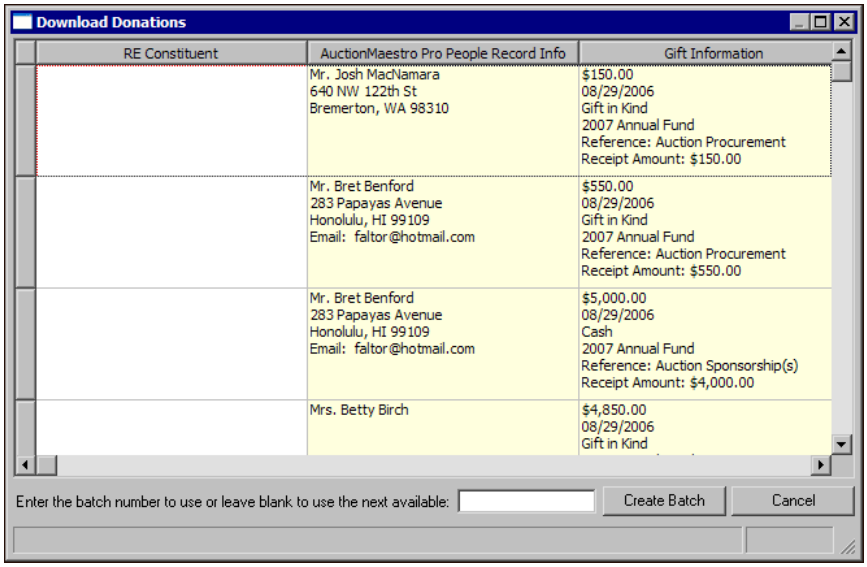
   When the download is complete, a message appears.

2. Click **OK**. You return to the AuctionMaestro Pro Integration screen. In the **STATUS** field under **Download Transactions from AuctionMaestro Pro**, the total number of downloaded transactions available for import appears.

   The total number of downloaded transactions may differ from the number of transactions in *AuctionMaestro Pro*.

   - During the download, a constituent's transactions are rolled up by transaction type, not including Fund-an-Item transactions. For example, if two auction night purchase transactions for a constituent download, they download as a single transaction.
   - A constituent's Fund-an-Item transactions roll up by the fund assigned to the transaction. For example, if two Fund-an-Item transactions for a constituent download, and the two transactions are applied to separate funds, two transactions download. If the two Fund-an-Item transactions are applied to the same fund, they download as a single transaction.

3. To import the downloaded transactions into ***The Raiser's Edge***, click **Click here to import transactions into The Raiser's Edge**. The Download Donations screen appears and displays the downloaded transaction data in a grid.



In the **RE Constituent** column, if the *AuctionMaestro Pro* people record was created from a data transfer from ***The Raiser's Edge***, the corresponding constituent record data appears. If no corresponding constituent record was found for the people record, the **RE Constituent** column is blank. If the **AuctionMaestro Pro People Record Info** differs from the **RE Constituent** information, manually update the constituent record in ***The Raiser's Edge***. The download does not automatically update the data on the associated constituent records.

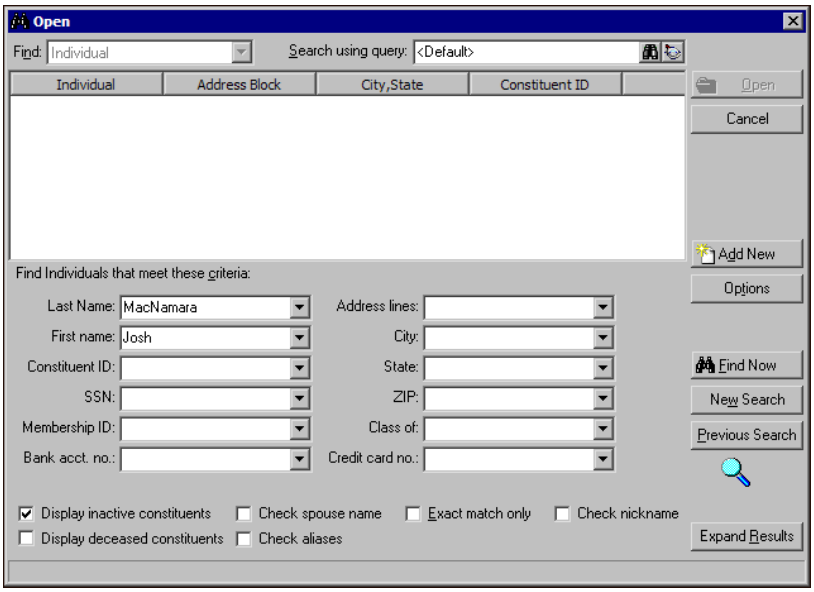
Warning: In the **AuctionMaestro Pro People Record Info** column, only the home address information appears. If the people record in *AuctionMaestro Pro* includes work address information but no home address information, the **AuctionMaestro Pro People Record Info** column displays only the constituent name. The work address information downloads to the constituent record in ***The Raiser's Edge***.

In the **AuctionMaestro Pro People Record Info** column, the constituent name and home address information associated with each downloaded transaction appears.

In the **Gift Information** column, the amount, download date, ***Raiser's Edge*** gift type, Raiser's Edge fund, *AuctionMaestro Pro* transaction type, and **Receipt Amount** for each downloaded transaction appear.

4. In the **RE Constituent** column, for any transactions and people records not already associated with a constituent record in ***The Raiser's Edge***, search the database for the constituent:

a. Press **F7** on your keyboard. The Open screen for Constituents appears.



b. Under **Find Individuals that meet these criteria**, the first and last name of the selected *AuctionMaestro Pro* people record appears. Select the additional criteria to use to search for your fund in the appropriate criteria fields. You can include the constituent ID, Social Security Number, membership ID, bank account number, address, graduating class, and credit card number. You can also select whether to display inactive or deceased constituents; check spouse name, nicknames, and aliases; or search for an exact match only.

c. Click **Find Now**.

If the search criteria entered matches a constituent in the database, it appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find multiple records. In the grid, select the constituent and click **Open**. You return to the Download Donations screen and the selected constituent appears in the **RE Constituent** column.

Warning: In the grid, one auction participant with multiple transactions may appear in multiple rows. When you create constituent records to associate with the downloaded transactions, use caution to not create duplicate constituent records.

If the program does not find a constituent who matches the search criteria, click **Cancel**. You return to the Download Donations screen. To add a new constituent record for the **AuctionMaestro Pro People Info**, press **F8** on your keyboard. The program creates a constituent record, and the new constituent appears in the **RE Constituent** column.

5. In the **Enter the batch number to create or leave blank to use next available** field, specify the batch number to use for the batch created from the download.
   - To use a specific batch number, enter the batch number in this field.
   - To use the next available batch number, leave the field blank.

Note: To fully commit downloaded transactions to your database in ***The Raiser's Edge***, the user must have security privileges associated with *Batch*. For more information about security privileges in ***The Raiser's Edge***, see the *Configuration and Security Guide*.

6. Click **Create Batch**. ***The Raiser's Edge*** creates a batch of the downloaded transactions associated with an **RE Constituent**. When the batch is created, a message appears to tell you in which batch the transactions were placed.

7. Click **OK**. You return to the Download Donations screen.
8. To return to the AuctionMaestro Pro Integration page, click **Cancel**.

Note: To account for any duplicate constituent records created during the download, we recommend you regularly run the Duplicate Constituent Report. To access the Duplicate Constituent Report, click **Duplicate Constituents** on the Administration page.

9. From *Batch*, you can commit the downloaded transactions to your database. Batches created from the downloaded transactions have a **Description** of "AuctionMaestro Pro Transactions". For more information about how to commit a batch in ***The Raiser's Edge***, see the *Batch Guide*.

   If necessary, you can link a downloaded transaction to registration fees, such as for the auction event, from *Batch* or from the gift record created when you commit the batch to the database. For more information about how to link a gift to registration fees, see the *Event Gifts Guide*.

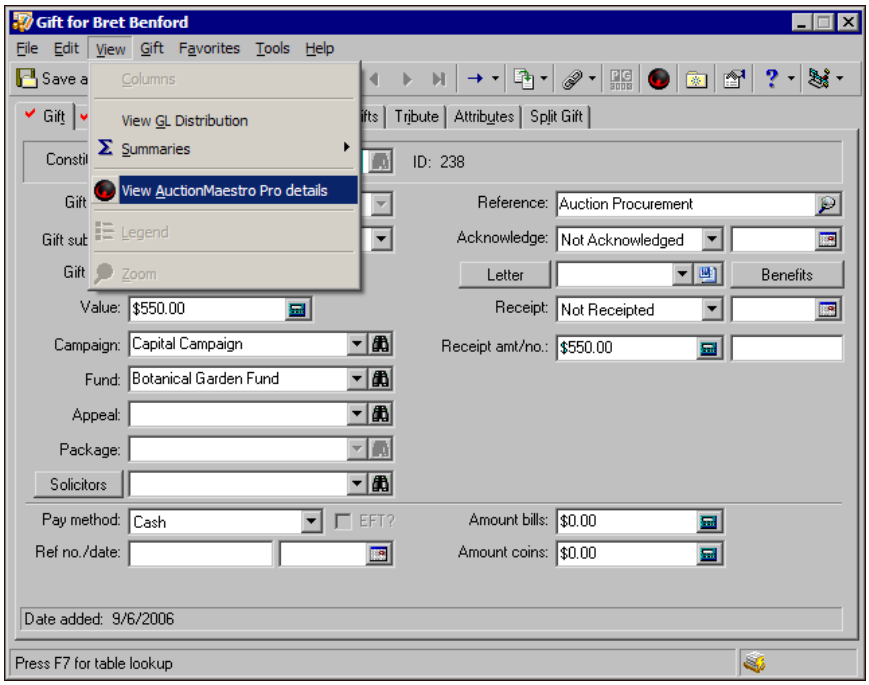
View AuctionMaestro Pro Transaction Details from The Raiser's Edge

Note: To view gift details from within ***The Raiser's Edge***, the user must have the applicable security privileges. For more information about security privileges in ***The Raiser's Edge***, see the *Configuration and Security Guide*.

After you download the transactions from *AuctionMaestro Pro*, you can view the *AuctionMaestro Pro* transaction details of the gift record generated in ***The Raiser's Edge***. To view the *AuctionMaestro Pro* details from ***The Raiser's Edge***, you must have Microsoft *Access 11* installed and have a macro security setting of Medium or Low. You must also store all historical *AuctionMaestro Pro* auction and people databases in the same directory and specify the location of the directory in the **Historic database directory path** field. For more information about how to connect to your historical *AuctionMaestro Pro* databases, see "Configure Databases" on page 11.

View AuctionMaestro Pro transaction details from a gift record

1. In ***The Raiser's Edge***, open the gift record created from a transaction download from *AuctionMaestro Pro*. For more information about how to open a gift record, see the *Gift Records Guide*.



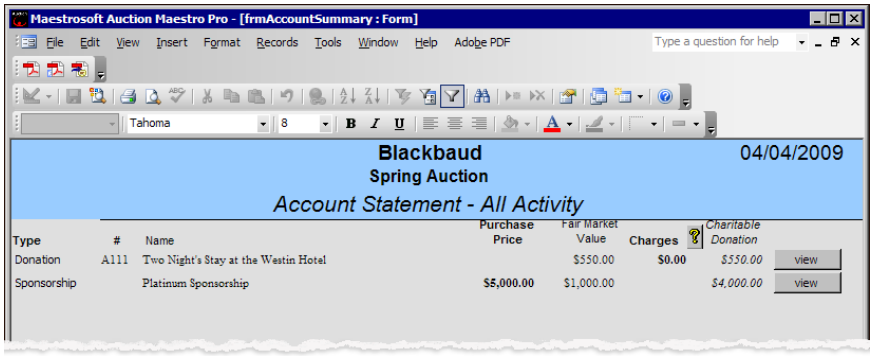
Note: On the **View** menu of a gift record that was not created from an *AuctionMaestro Pro* transaction download, the **View AuctionMaestro Pro details** option is disabled.

2. From the menu bar, select **View**, **View AuctionMaestro Pro details**. The Logon screen appears.

Warning: To access the historic *AuctionMaestro Pro* databases, you must have Microsoft *Access 11* installed. If you have *Access 11* installed and receive a message stating it cannot open the database, your macro security setting in *Access* may be set to "High". To access a historic database, you must have a macro security setting of "Medium" or "Low".

3. Click **OK**. ***The Raiser's Edge*** opens Microsoft *Access 11*. If your macro security setting in *Access* is set to "Medium", a message appears to ask whether to open the database. Click **Open**.

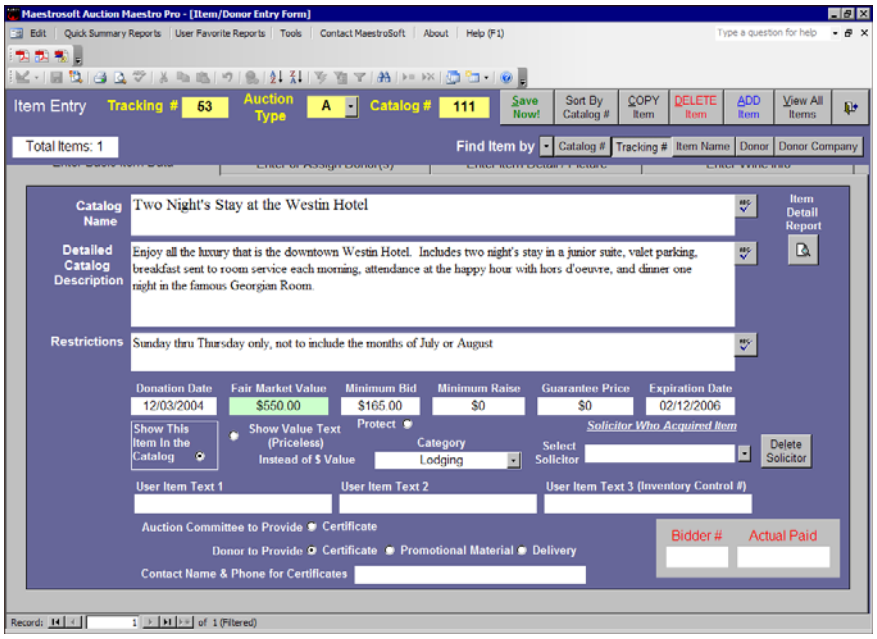
The Raiser's Edge accesses the historic *AuctionMaestro Pro* databases to compile the transaction details. This may take a few minutes. When ***The Raiser's Edge*** finishes compiling the transaction details, *AuctionMaestro Pro* opens and displays an Account Statement associated with the constituent.



Warning: When you connect to the *AuctionMaestro Pro* databases, you specify the location of the historical databases. If you move a historical database from this location, or if you rename or delete a historical database, ***The Raiser's Edge*** cannot successfully compile its transaction details.

If ***The Raiser's Edge*** cannot successfully compile the transaction details from *AuctionMaestro Pro*, a message occurs to inform you of this and the reason for the failure. Click **OK** and make adjustments as necessary.

4. To view the details of a specific transaction, click **view** by its listing on the Account Statement. The Item/Donor Entry Form for the transaction appears.



5. To close the Item/Donor Entry Form and return to ***The Raiser's Edge***, select **File**, **Exit** on the menu bar.

Consignment Transaction Handling

With *AuctionMaestro Pro Integration*, you can track consignment price transactions downloaded from *AuctionMaestro Pro*. For example, a local sports memorabilia shop donates an autographed basketball to your organization's gala auction. The sports memorabilia shops donates the basketball on a consignment basis and expects a fixed dollar amount or a percentage of the sale price if the basketball is purchased at the auction.

Fixed Consignment Price Transactions

Note: In *AuctionMaestro Pro*, you enter the consignment fee in the **Item Cost** field on the Enter Item Detail/Picture tab of the Item Entry screen.

With *AuctionMaestro Pro Integration*, you can track fixed consignment price transactions downloaded from *AuctionMaestro Pro*. For example, a local sports memorabilia shop donates an autographed basketball worth $500 to your organization's gala auction. The sports memorabilia shops donates the basketball on a consignment basis and expects a fixed dollar amount of $250 if the basketball is purchased at the auction. In this scenario, the fair market value of the basketball is $500, and the consignment price is $250. If the basketball is sold at the auction, your organization can only expect to receive the difference of the purchase price and the consignment price. For example, if the an auction participant purchases the basketball for $600, your organization receives $350 after the sports memorabilia shop receives its $250 consignment fee.

After you download the auction records associated with this transaction from *AuctionMaestro Pro*, two gift records are created in ***The Raiser's Edge***.

- One gift record, associated with the donor, tracks the gift-in-kind of the item donation. For example, the sports memorabilia shop's gift record $500 Gift-in-kind value of the autographed basketball, with a receipt amount of $250 (the difference of the fair market value and the consignment price).
- The other gift record, associated with the auction participant, tracks the auction purchase. For example, the $600 purchase price of the autographed basketball, with a receipt amount of $100 (the difference of the purchase price and the fair market value).

Percentage-Based Consignment Transactions

Note: In *AuctionMaestro Pro*, when you enter the percentage fee in the **Revenue Split** field on the Enter Item Detail/Picture tab of the Item Entry screen.

With *AuctionMaestro Pro Integration*, you can track fixed consignment price transactions downloaded from *AuctionMaestro Pro*. For example, a local sports memorabilia shop donates an autographed basketball worth $500 to your organization's gala auction. The sports memorabilia shops donates the basketball on a consignment basis and expects 50% of the sale price if the basketball is purchased at the auction. In this scenario, the fair market value of the basketball is $500, and the consignment price is unknown until the item is purchased. If the basketball is sold at the auction, your organization can only expect to receive the difference of the purchase price and the consignment percentage price. For example, if the an auction participant purchases the basketball for $600, your organization receives $300 after the sports memorabilia shop receives its $300 consignment fee.

Because the consignment percentage price cannot be determined until the item is sold at the auction, we recommend you do not download the transaction until after the transaction record is complete, post-auction. After you download the auction records associated with this transaction from *AuctionMaestro Pro*, two gift records are created in ***The Raiser's Edge***.

- One gift record, associated with the donor, tracks the gift-in-kind of the item donation. For example, the sports memorabilia shop's gift record $500 Gift-in-kind value of the autographed basketball, with a receipt amount of $200 (the difference of the fair market value and the consignment percentage price).

- The other gift record, associated with the auction participant, tracks the auction purchase. For example, the $600 purchase price of the autographed basketball, with a receipt amount of $100 (the difference of the purchase price and the fair market value).

If you download the transaction before the consignment percentage price is recorded in *AuctionMaestro Pro*, you must manually update the gift record in ***The Raiser's Edge*** to reflect the receipt amount.

Field Mapping

Auction/Event Management Records **52**
People/Constituent Records **53**
Transaction/Gift Records **58**

With *AuctionMaestro Pro Integration*, you transfer data between *AuctionMaestro Pro* and ***The Raiser's Edge***. This section outlines the location in each program of the transferred data. When you transfer data between *AuctionMaestro Pro* and ***The Raiser's Edge***, you can use these tables as a reference.

Auction/Event Management Records

In *AuctionMaestro Pro*, you track information about your auction events. Similarly, if you have *Event Management*, you maintain event records in ***The Raiser's Edge***. With *AuctionMaestro Pro Integration*, you can associate an event record in ***The Raiser's Edge*** with an auction database in *AuctionMaestro Pro* and transfer auction and participant information between the two programs. For information about how to configure your databases to transfer event data, see "Configure Databases" on page 11.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Auction name field	Set Auction Name, Date and Goal screen	**Name** field	Event record; General tab	
Select Auction Date field	Set Auction Name, Date and Goal screen	**Start date** field	Event record; General tab	
Total Goal $$ field	Set Auction Name, Date and Goal screen	**Event goal** field	Event record; General tab	
Recognition/ Registration Level column	Recognition Level screen	**Unit** column	Event record; Prices tab	
Donation column	Recognition Level screen	**Gift Amount** column	Event record; Prices tab	
Expense Category column	Budgets & Expenses screen	**Expense Type** column	Event record; Expenses tab	When you transfer event data from ***The Raiser's Edge***, the **Direct** checkbox is marked for each **Expense Category** created in *AuctionMaestro Pro*.
Budget column	Budgets & Expenses screen	**Budgeted** column	Event record; Expenses tab	
Last Name and **First Name** fields	People Info Viewer screen	**Name** column	Event record, Participants tab; Participant record	When you download auction data from *AuctionMaestro Pro*, the participants in the people database paired with the auction database appear on the Participants tab of the Event record in ***The Raiser's Edge***.
N/A	N/A	**Status** column	Event record, Participants tab; Participant record, General tab	When you configure the integration settings, you select the **Status** to apply to all downloaded auction participants.
N/A	N/A	**Registration** column	Event record, Participants tab; Participant record, General tab	When you configure the integration settings, you select the **Registration** status of all downloaded auction participants.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
N/A	N/A	**Attended** column	Event record, Participants tab; Participant record, General tab	When you configure the integration settings, you select whether the **Participant has attended.**
N/A	N/A	**Invite** field	Participant record; General tab	When you configure the integration settings, you select the **Invite** status of all downloaded auction participants.
N/A	N/A	**Registration** field	Participant record; General tab	When you configure the integration settings, you select the **Registration** status of all downloaded auction participants.
N/A	N/A	**Participant has attended** checkbox	Participant record; General tab	When you configure the integration settings, you select whether the **Participant has attended.**

People/Constituent Records

In ***The Raiser's Edge***, you track information about your organization's constituents. Similarly, in *AuctionMaestro Pro*, you track information about your auction participants. With *AuctionMaestro Pro Integration*, you transfer information from your ***Raiser's Edge*** constituent records to people records in *AuctionMaestro Pro*. Likewise, when you download transaction data from *AuctionMaestro Pro*, ***The Raiser's Edge*** can create new constituent records for auction participants. For information about how to configure your databases to transfer constituent data, see "Configure Databases" on page 11.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Primary Sal (Title) field	People Info Entry screen; Names & Addresses tab	**Titles** field	Individual constituent record; Bio 1 tab	
Primary First Name field	People Info Entry screen; Names & Addresses tab	**First name** field	Individual constituent record; Bio 1 tab	
Primary Last Name field	People Info Entry screen; Names & Addresses tab	**Last name** field	Individual constituent record; Bio 1 tab	
Primary Gender field	People Info Entry screen; Names & Addresses tab	**Gender** field	Individual constituent record; Bio 1 tab	
Primary Text fields	People Info Entry screen; Names & Addresses tab	N/A	N/A	

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Spouse Sal (Title) field	People Info Entry screen; Names & Addresses tab	**Titles** field	Individual constituent record; **Spouse** button	
Spouse First Name field	People Info Entry screen; Names & Addresses tab	**First name** field	Individual constituent record; **Spouse** button	
Spouse Last Name field	People Info Entry screen; Names & Addresses tab	**Last name** field	Individual constituent record; **Spouse** button	
Spouse Gender field	People Info Entry screen; Names & Addresses tab	**Gender** field	Individual constituent record; **Spouse** button	
Spouse Text fields	People Info Entry screen; Names & Addresses tab	N/A	N/A	
Home Address fields	People Info Entry screen; Names & Addresses tab	**Address lines** field	Individual constituent record; Addresses tab; Address screen with an Address type of "Home"	When you transfer individual constituent data to *AuctionMaestro Pro*, you select whether to consider seasonal addresses or addresses with select attributes as the **Home Address**.
Home City State Zip field	People Info Entry screen; Names & Addresses tab	**City**, **State**, and **ZIP** fields	Individual constituent record; Addresses tab; Address screen with an Address type of "Home"	When you transfer individual constituent data to *AuctionMaestro Pro*, you select whether to consider seasonal addresses or addresses with select attributes as the **Home Address**.
Home Country field	People Info Entry screen; Names & Addresses tab	**Country** field	Individual constituent record; Addresses tab; Address screen with an Address type of "Home"	When you transfer individual constituent data to *AuctionMaestro Pro*, you select whether to consider seasonal addresses or addresses with select attributes as the **Home Address**.
Home # field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Individual constituent record; Addresses tab; Address screen with an **Address type** of "Home"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Home" for the **Home #** field.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Home Fax field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Individual constituent record; Addresses tab; Address screen with an **Address type** of "Home"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Fax" for the **Home Fax** field.
Home Email field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Individual constituent record; Addresses tab; Address screen with an **Address type** of "Home"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Email" for the **Home Email** field.
Work Company field	People Info Entry screen; Names & Addresses tab	**Org name** field	Individual constituent record, **Business** button; Organization constituent record Org 1 tab	
Work Contact field	People Info Entry screen; Names & Addresses tab	**Contact** checkbox	Constituent record Relationship tab; **Business** button; Relationship record General 1 tab	When you transfer constituent data from ***The Raiser's Edge***, you can select to create individual people records in *AuctionMaestro Pro* for organization constituent contacts. This enables you to track whether an organization contact participates in an auction as an individual or on the behalf of the organization.
Work Address fields	People Info Entry screen; Names & Addresses tab	**Address lines** field	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you transfer constituent data to *AuctionMaestro Pro*, you select whether to transfer business address information. If you do not select to **Transfer two addresses to AuctionMaestro Pro**, only the home address information transfers.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Work City State Zip field	People Info Entry screen; Names & Addresses tab	**City**, **State**, and **ZIP** fields	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you transfer constituent data to *AuctionMaestro Pro*, you select whether to transfer business address information. If you do not select to **Transfer two addresses to AuctionMaestro Pro**, only the home address information transfers.
Work Country field	People Info Entry screen; Names & Addresses tab	**Country** field	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you transfer constituent data to *AuctionMaestro Pro*, you select whether to transfer business address information. If you do not select to **Transfer two addresses to AuctionMaestro Pro**, only the home address information transfers.
Work Fax field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Fax" for the **Work Fax** field.
Work # field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Business" for the **Work #** field.
Work Ext field	People Info Entry screen; Names & Addresses tab	N/A	N/A	

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Work Email field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Email" for the **Work Email** field.
Work Web Site field	People Info Entry screen; Names & Addresses tab	**Phones/Email/ Links** grid	Constituent record; Addresses tab; Address screen with an Address type of "Business"	When you configure the integration settings, you select the phone type in ***The Raiser's Edge*** to assign to each phone field downloaded from *AuctionMaestro Pro*. When you transfer constituent data to *AuctionMaestro Pro*, you select the phone type in ***The Raiser's Edge*** to transfer to each phone field in *AuctionMaestro Pro*. For example, you can select to use a **Phone type** of "Web address" for the **Work Web Site** field.
Addressee field	People Info Entry screen; Names & Addresses tab	**Primary Addressee** field; **Additional Addressees and Salutations** grid	Individual constituent record; Addressees/ Salutations tab	When you transfer constituent data to *AuctionMaestro Pro*, you select which addressee to use in *AuctionMaestro Pro*. When you download people data from *AuctionMaestro Pro*, the **Addressee** field downloads as the **Primary addressee** in ***The Raiser's Edge***.
Salutation field	People Info Entry screen; Names & Addresses tab	**Primary Salutation** field; **Additional Addressees and Salutations** grid	Individual constituent record; Addressees/ Salutations tab	When you transfer constituent data to *AuctionMaestro Pro*, you select which salutation to use in *AuctionMaestro Pro*. When you download people data from *AuctionMaestro Pro*, the **Salutation** field downloads as the **Primary salutation** in ***The Raiser's Edge***.
Filter Categories grid	People Info Entry screen; Names & Addresses tab	**Constituent Codes** grid	Individual constituent record; Bio 2 tab	When you transfer constituent data to *AuctionMaestro Pro*, you select which and how many **Constituent Codes** to transfer as **Filter Categories** in *AuctionMaestro Pro*.
Invitation Requested or **Sent** options	People Info Entry screen; Names & Addresses tab	**Invite?** field	Participant record; General tab	When you download people data from *AuctionMaestro Pro*, the **Invitation** field data does not transfer. Instead, you can select whether to show the downloaded constituents' **Invite** status as "Invited", "Not invited", or "Do not invite".

Transaction/Gift Records

In ***The Raiser's Edge***, you track information about your constituents' gifts to your organization. Similarly, in *AuctionMaestro Pro*, you track information about your auction participants' transactions. With *AuctionMaestro Pro Integration*, when you download transaction data from *AuctionMaestro Pro*, ***The Raiser's Edge*** creates new gift records for transactions associated with the auction event. The table below explains the information that appears on ***Raiser's Edge*** gift records created from downloaded *AuctionMaestro Pro* transactions. For information about how to configure your databases to download transaction data, see "Configure Databases" on page 11.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Primary fields	Item Entry screen; Enter or Assign Donor(s) tab	**Constituent** field	Gift record; Gift tab	
Type of Registration	People Info Entry screen; All Activity tab	**Gift type** field of Cash **Reference** field of Auction Registration(s)	Gift record; Gift tab	A registration fee transaction is the amount of money a participant pays to attend your event.
Type of Item Purchase	People Info Entry screen; All Activity tab	**Gift type** field of Cash **Reference** field of Auction Night Purchase(s)	Gift record; Gift tab	An auction purchase transaction is the amount of money a participant pays to buy an item at an auction event.
Auction Type of Merchandise	People Info Entry screen; All Activity tab	**Gift type** field of Cash **Reference** field of Auction Merchandise Purchase(s)	Gift record; Gift tab	All items, or merchandise, bought through the MaestroSoft Store are assigned an auction type of "$". These items include t-shirts, caps, and raffle tickets. Items assigned an auction type of "$" are not tax-deductible.
Auction Type of Sponsorship	People Info Entry screen; All Activity tab	**Gift type** field of Cash **Reference** field of Auction Sponsorship(s)	Gift record; Gift tab	In *AuctionMaestro Pro*, you sell sponsorships to help raise money for an auction event. Examples of sponsorships include cash donations, advertising, and payments to cover the registration fees for a table.
Type of Fund-an-Item	People Info Entry screen; All Activity tab	**Gift type** field of Cash **Reference** field of Auction Fund-an-Item(s)	Gift record; Gift tab	A "Fund-an-Item" transaction is any cash donation given during an event, usually in support of a cause or plea.
Type of Donation	People Info Entry screen; All Activity tab	**Gift type** field of Gift-in-Kind **Reference** field of Auction Procurement(s)	Gift record; Gift tab	A donation is an item donated by a person for auction.

AuctionMaestro Pro Field	AuctionMaestro Pro Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Amt Due field, with **Paid** marked	Basic Registration screen	**Amount** field	Gift record; Gift tab	For gift records with a **Reference** of Auction Registration(s), the **Amount** is the amount paid for the registration.
Actual Paid field	Item Entry screen	**Amount** field	Gift record; Gift tab	For gift records with a **Reference** of Auction Night Purchase(s) or Auction Merchandise Purchase(s), the **Amount** is the sum of all purchases. For gift records with a **Reference** of Auction Fund-an-Item(s), the **Amount** is the **Actual Paid** for the donation.
Amount Paid field, with **Paid** marked	Event Sponsorships screen	**Amount** field	Gift record; Gift tab	For gift records with a **Reference** of Auction Sponsorship(s), the **Amount** is the sum of all sponsorships.
Fair Market Value field	Item Entry screen	**Value** field	Gift record; Gift tab	For gift records with a **Gift Type** of Gift-in-Kind, the **Value** is the **Fair Market Value** of the donation.
Charitable Donation column	People Info Entry screen; All Activity tab	**Receipt amt** field	Gift record; Gift tab	
N/A	N/A	**Campaign** field	Gift record; Gift tab	You assign a ***Raiser's Edge*** fund to each *AuctionMaestro Pro* transaction type when you configure the integration settings or enter a Fund-an-Item transaction in *AuctionMaestro Pro*. The **Campaign** field displays the campaign associated with the assigned **Fund**.
Fund Name field, for transactions with a **Type** of Fund-an-Item	Item Entry screen; Enter Item Detail/Picture tab	**Fund** field	Gift record; Gift tab	You assign a ***Raiser's Edge*** fund to each *AuctionMaestro Pro* transaction type when you configure the integration settings or enter a Fund-an-Item transaction in *AuctionMaestro Pro*.

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