TheRaiser'sEdge® Enterprise™

Data Enrichment Services Guide for Canada

Data Enrichment Services Guide for Canada

Contents

What Is In This Guide?

The *Data Enrichment Services Guide* covers the services located under the **Data Enrichment Services** link on the Administration page. See the AddressAccelerator chapter for information about updating and certifying addresses in your database using *AddressAccelerator*.

How Do I Use These Guides?

The Raiser's Edge 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.

Icons

The following icons are used in the side margins to denote additional information such as notes, warnings, time-savers, or definitions. You can also use these margins to write your own notes.

Welcome

The notepad symbol designates a note or tip related to the information in the main text column.

The traffic light indicates a cautionary note. Generally, we use this icon to point out a step that may have unwanted results.

The clock symbol designates a shortcut or timesaving action.

The dictionary symbol designates the definition of a frequently used term.

Address Accelerator

Chapter 1

Contents

Procedures

Mailings are important to your work as a nonprofit organization. The address correction service *AddressAccelerator* checks, corrects, and certifies the addresses in your database to ensure your mailings reach the intended recipients.

With the *AddressAccelerator* data correction service, you can easily search for, apply address corrections, and validate addresses right in your database. You must download the updated address data files monthly from the Blackbaud Web site and install them on your computer or network. The data files contain every deliverable mailing address in Canada. You can use the installed data files as often as necessary to validate your mailing list. You can update addresses with missing or misspelled information, correct missing or incorrect postal codes, and standardize street addresses.

With *AddressAccelerator*, you can choose to correct and validate addresses for **All Records**, **Selected Records**, or **One Record**, as well as print an **Updated Address Report** and the required Statement of Accuracy (SOA) report that must accompany mailings qualifying for discounts. You can also use *AddressAccelerator* with other parts of **The Raiser's Edge Enterprise** to look up, correct, and validate addresses when entering constituents in *Batch*, from the address screen of a constituent record, and from the PostalSaver tab in *Mail* if you use *PostalSaver*.

For more information about Canada Post addressing requirements, we recommend you see the *Canada Postal Guide*. To receive this Canada Post publication, contact the Canada Post National Philatelic Centre at 1-800-565-4362.

For more information about *PostalSaver* and presortation discounts, see the *PostalSaver Guide for Canada*.

Frequently Used Terms

To effectively use mail tasks for your organization's fundraising efforts, you should have a basic understanding of common mail terms. If you find an unfamiliar term when reading this or any guide in **The Raiser's Edge** documentation, search the online glossary in the help file.

Address certification. Address certification is a process used by the Canada Post to ensure a specific level of quality in a mailing list. The objective of address certification is to increase the accuracy of the street names, street numbers, town names, and postal codes in addresses on your mailing list. The *AddressAccelerator* subscription service corrects and certifies addresses in your database.

CPC. CPC is an abbreviation for Canada Post Corporation.

Postal Code. The Postal Code is a coding system that identifies the post office or metropolitan area associated with an address. The postal code is a vital part of all addresses in Canada. It is made up of two elements, each comprised of three characters: the Forward Sortation Area (FSA) and the Local Delivery Unit (LDU). The FSA, or the first section of the postal code, represents a geographic area (e.g. K1A). The LDU, or the last three characters (numeric - alpha - numeric) of the postal code, represents a specific point or set of points of call located within the area identified by the FSA.

SERP. SERP stands for Software Evaluation and Recognition Program. If a software program is SERP-certified, this means it is approved by the Canada Post to correct and validate mailing lists according to Canada Post requirements. *AddressAccelerator* is SERP-certified through Satori Software, Inc. to update and validate addresses in your database and qualify you for discounts on mailings.

SOA form. SOA stands for Statement of Accuracy report. This report, or certificate, indicates the level of Address Accuracy. To obtain maximum discounts from the Canada Post, a mailing must have at least a 95% accuracy level. SOA-certification is valid for one year, as long as the address list does not change. *AddressAccelerator* automatically prints this report when you mark the **Print SOA form** checkbox on the Process Options tab when updating addresses. Canada Post requires this certificate accompany mailings to qualify for discounts on mailings. You need to enter your CPC number the Canada Post gives you for your discounts on the General page in *Configuration* so it prints on the SOA report.
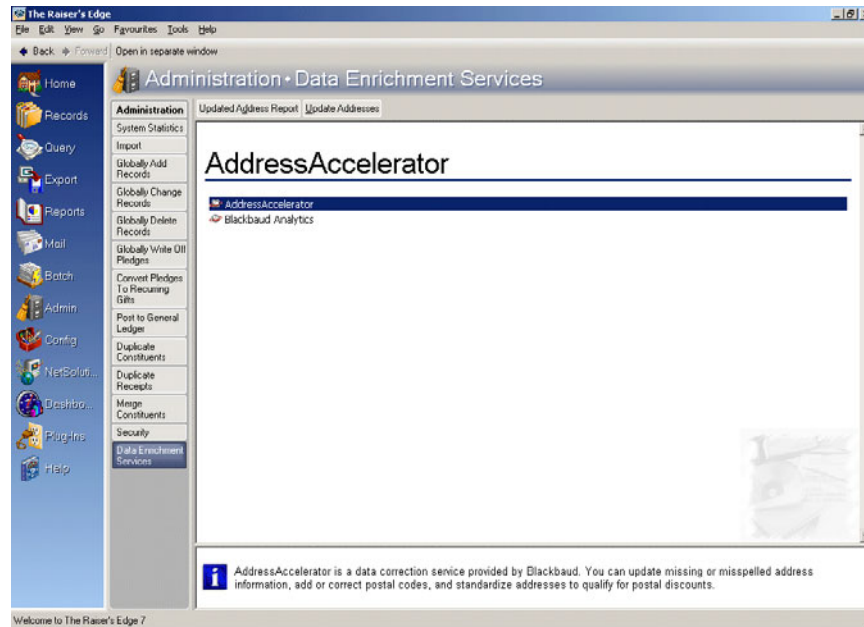
Tie-on bag tag. A tie-on tag is an eyelet tag which must be affixed to a mail bag with strong or plastic cable ties.

Navigating in AddressAccelerator

To access *AddressAccelerator*, click **Admin** on the Raiser's Edge bar and click the **Data Enrichment Services** link.
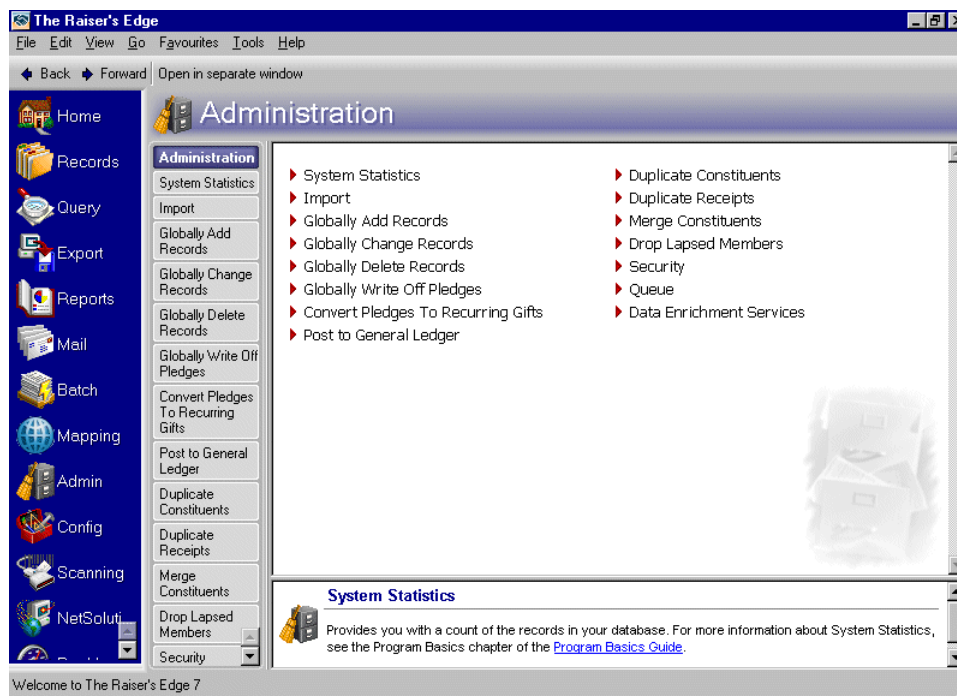
The Data Enrichment Services page appears with the **AddressAccelerator** service highlighted.

Understanding AddressAccelerator Footnote Flags

When addresses are processed and updated by *AddressAccelerator*, addresses that create exceptions are flagged with footnotes to indicate the reason why the address could not be certified. An exception prevents the program from updating the address in your database. For example, an address with the footnote flag "E" has a city and postal code that could not be found. Because the city and postal code were not found, an exception is created to alert you that a problem exists. The following footnote flags are used with *AddressAccelerator*.

| Footnote Flag.	Meaning.
A	Address and postal code conflict.
B	Street and postal code conflict.
C	Delivery mode changed.
D	Foreign address
E	No match

Installing AddressAccelerator Data Files

The Canada Post updates *AddressAccelerator* data files monthly. You can access these data files from the Blackbaud Web site, so you can update, validate, and keep the addresses in your database current. To access the information in the *AddressAccelerator* data files, you must download them from www.blackbaud.com monthly and install them on your computer. If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access. Then, you must link the files to **The Raiser's Edge** by entering the path to the data files in User Options.

If you also use *PostalSaver*, you must install the *AddressAccelerator* and *PostalSaver* data files in the same location. You then need to link to this location in User Options.

➢ **Installing AddressAccelerator information**

1. Access the latest address data files on the Blackbaud Web site and download them.

2. Access the downloaded files and click the *.exe file. The InstallShield Wizard appears to guide you through installation.
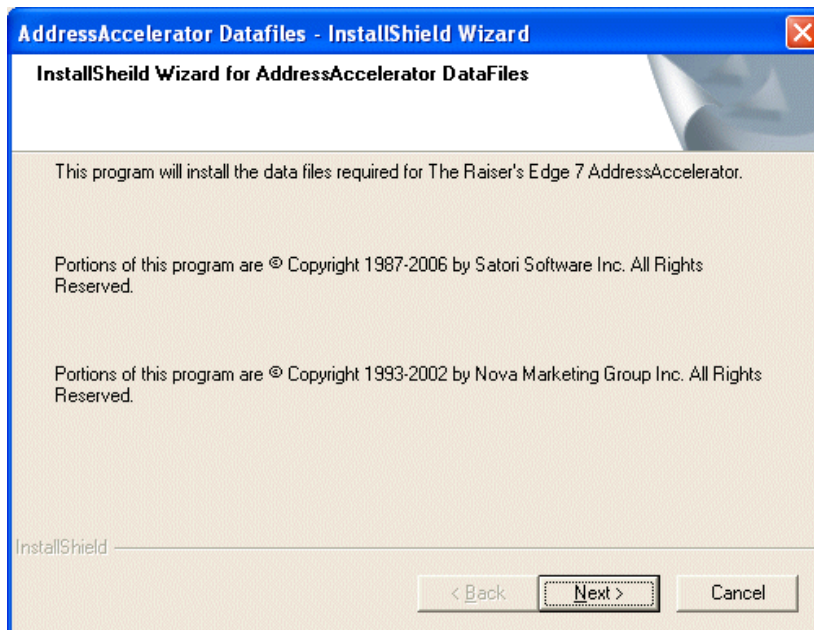
3. Click **Next**. The Choose Destination Location screen of the wizard appears.
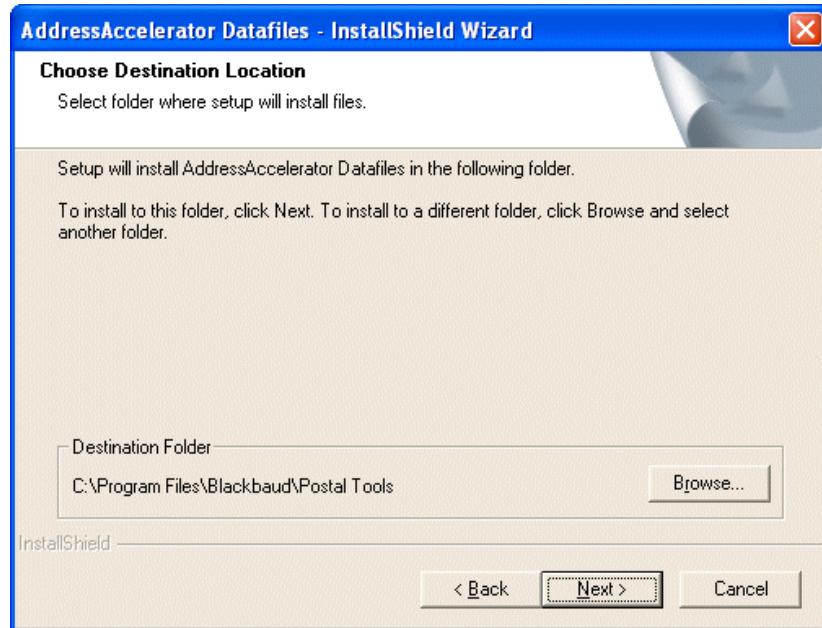

4. In the **Destination Folder** frame, the default location to install the *AddressAccelerator* data files appears. If you do not want to install the data files in the default location, click **Browse** to select a different location. The Choose Folder screen appears.

In the **Path** field, enter the location for the data files or select a location in the **Directories** frame by opening the folder in which you want to install the data files. You can install the data files where you have *The Raiser's Edge* installed and create a new folder. For example, you can name this folder "AddressAccelerator Datafiles". If you work on a network, you can install the data files on the server or in a shared folder on any computer all users can access.

Click **OK**. You return to the Choose Destination Location screen of the wizard. The location you selected for the data files appears in the **Destination Folder** frame.

5. Click **Next**. The Setup Status screen appears. The status bar indicates the percentage of the installation process completed.
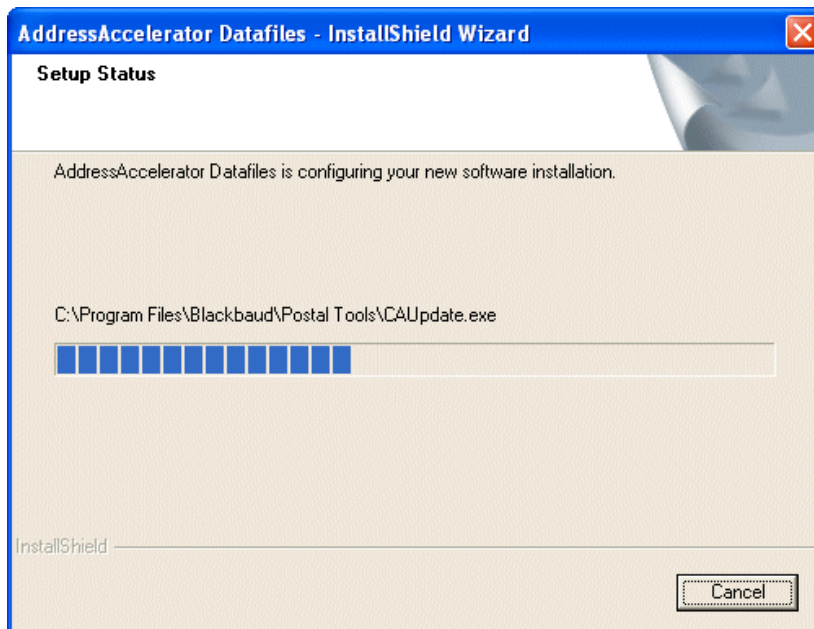
You can click **Cancel** at any time to stop the installation. If you do so, the data files will not be installed or usable, no matter what percentage is displayed on the status bar. You must start the installation process again to successfully install the data files.

6. When the status bar reaches 100%, the *AddressAccelerator* data files are successfully installed. The InstallShield Wizard Complete screen appears.
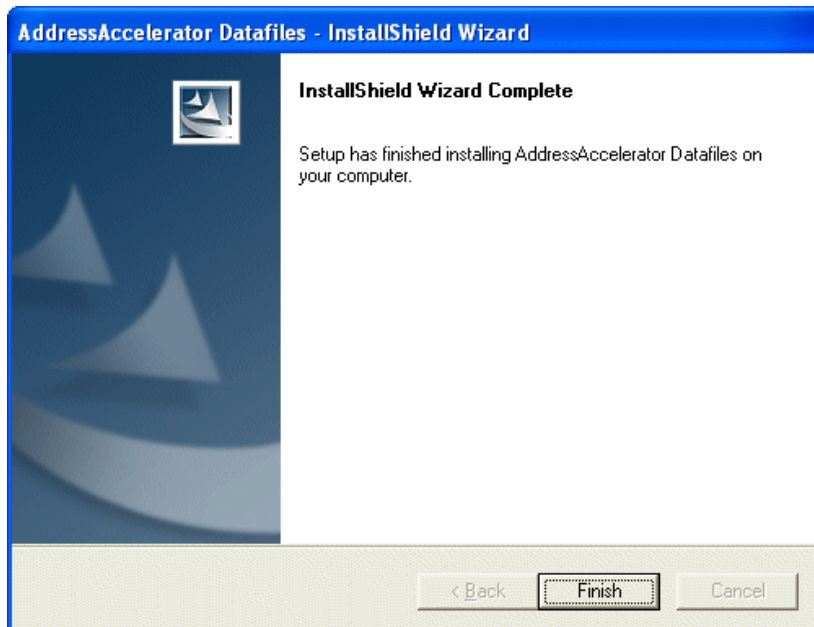
7. Click **Finish**.
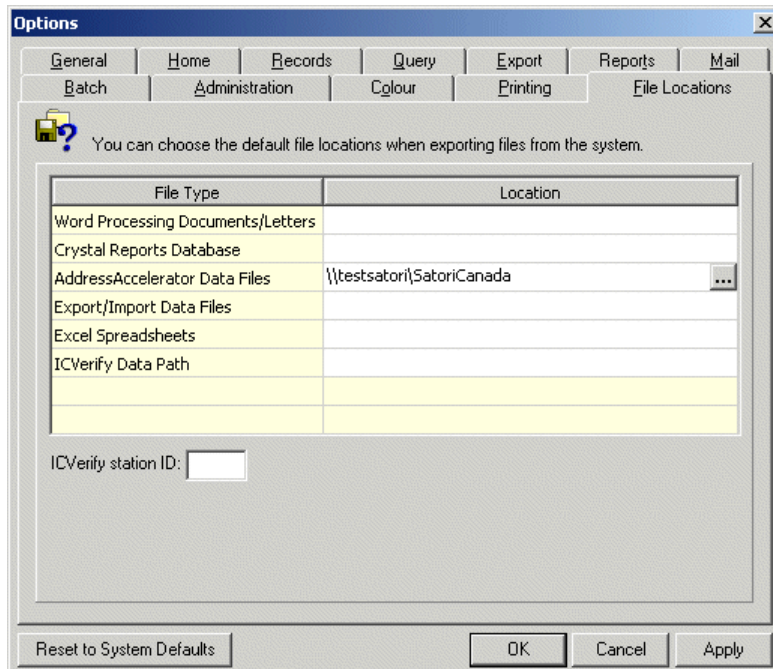8. Open *The Raiser's Edge*.

9. From the shell menu bar, select **Tools, User Options**.
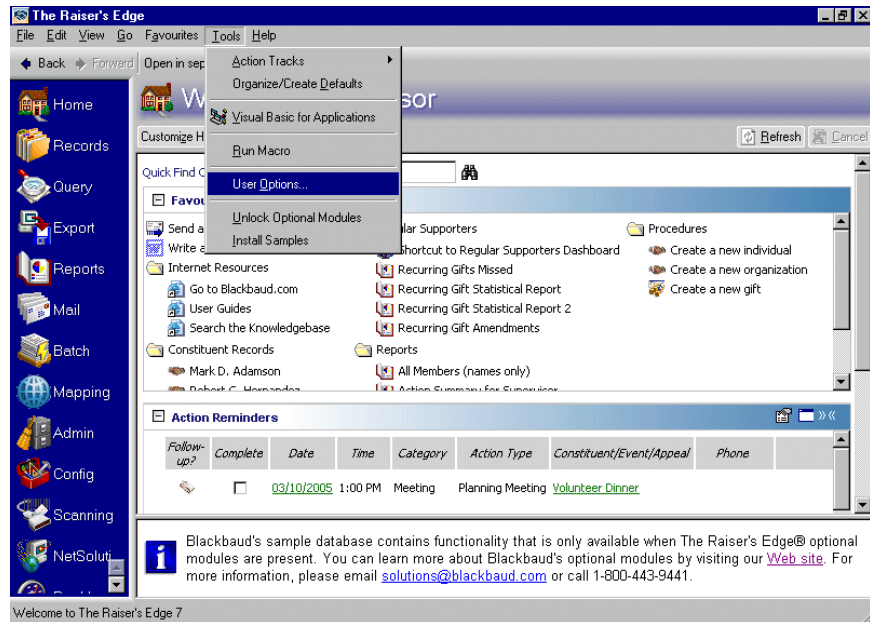
10. The Options screen appears. Select the File Locations tab.

11. On the **AddressAccelerator Data Files** row, place your cursor in the **Location** column. An ellipsis appears.

12. Enter the path to the *AddressAccelerator* data files you just installed or click the ellipsis to browse to the location. If you do so, the Browse for Folder screen appears so you can locate the data files.
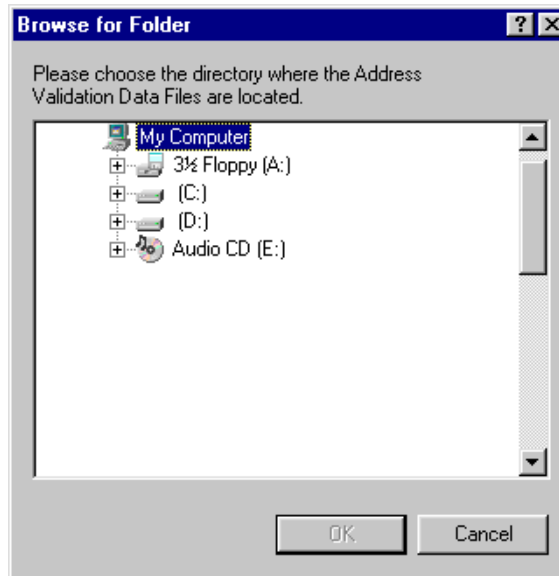
13. Once you locate the data files, highlight the folder and click **OK**. You return to the User Options screen. The path to the files appears in the **AddressAccelerator Data Files** row.

14. To apply the path, click **Apply**.

15. To save the path you entered, click **OK**. You return to the shell of *The Raiser's Edge*.

   You are now ready to begin correcting, updating, and certifying addresses.
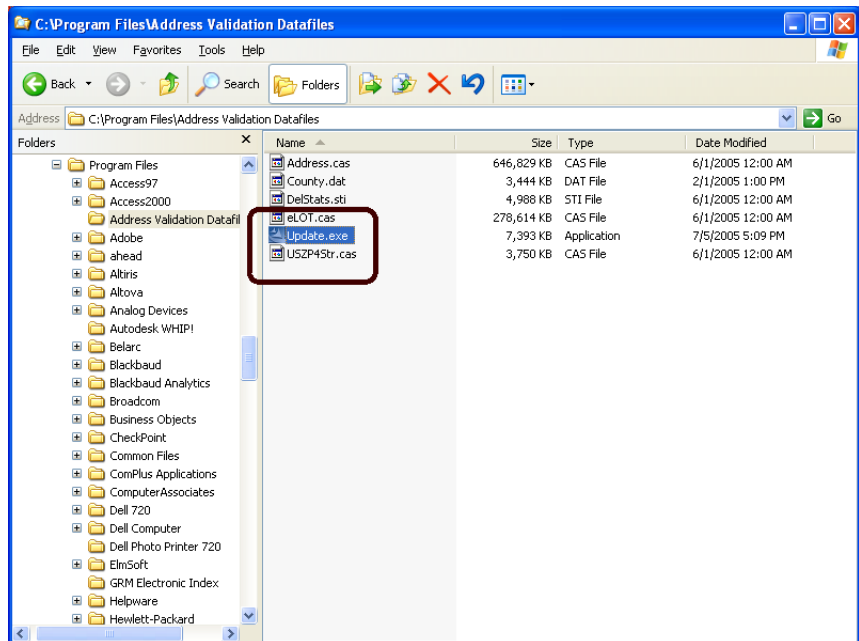
Mailroom Toolkit

After you install the **AddressAccelerator** data files on a workstation or server for the first time, you must run the installation wizard to install the Satori *MailRoom ToolKit* update files. If you install the **AddressAccelerator** data files on a server, you must install the *MailRoom ToolKit* update files on each workstation that uses **AddressAccelerator**. **AddressAccelerator** uses the toolkit to sort your mailing and take advantage of postal discounts.

➢ **Install Mailroom toolkit**

1. After you download and install the data files (see "Installing AddressAccelerator Data Files" on page 5), browse to the installation location (for example, C:\Program Files\Address Validation Datafiles).

You may need to close *The Raiser's Edge* and reopen it or restart your computer to get maximum performance from newly-installed data files.

2. Run the Update.exe file. This installs the *MailRoom Toolkit*.

The MailRoom ToolKit Update Setup screen appears.
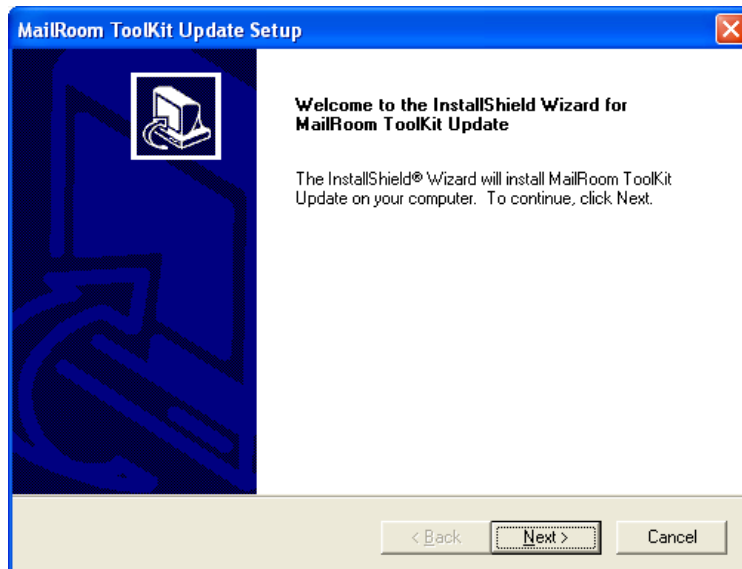
3. Click **Next**. The Chose Destination Location screen appears, asking you to select the location in which you want the software installed. The default location appears in the **Destination Folder** frame. Click the **Browse** button to access the Choose folder screen and map to a different location.
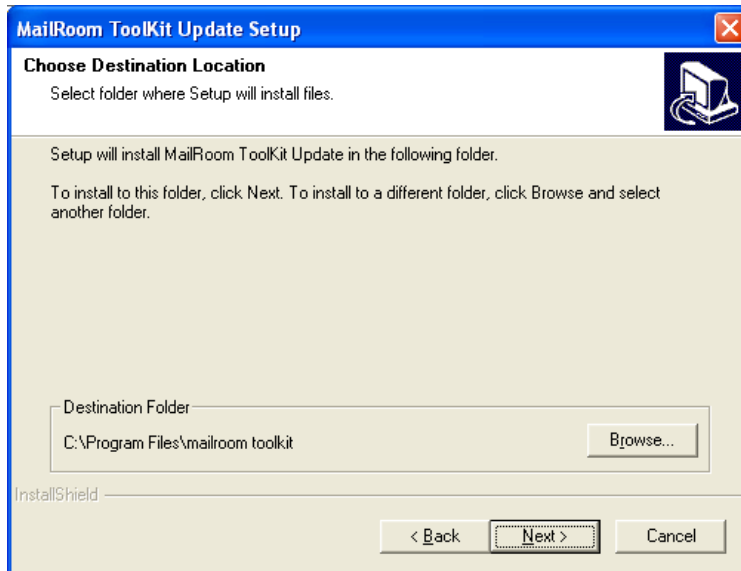
4. Click **Next**. A progress bar tracks the installation process.
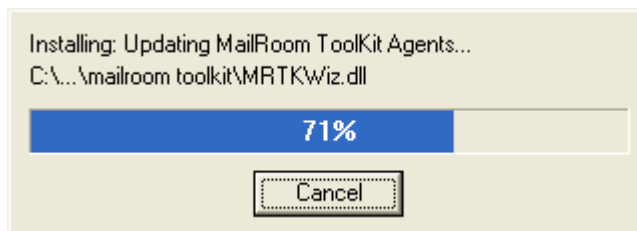
A final screen appears, confirming the installation is complete.
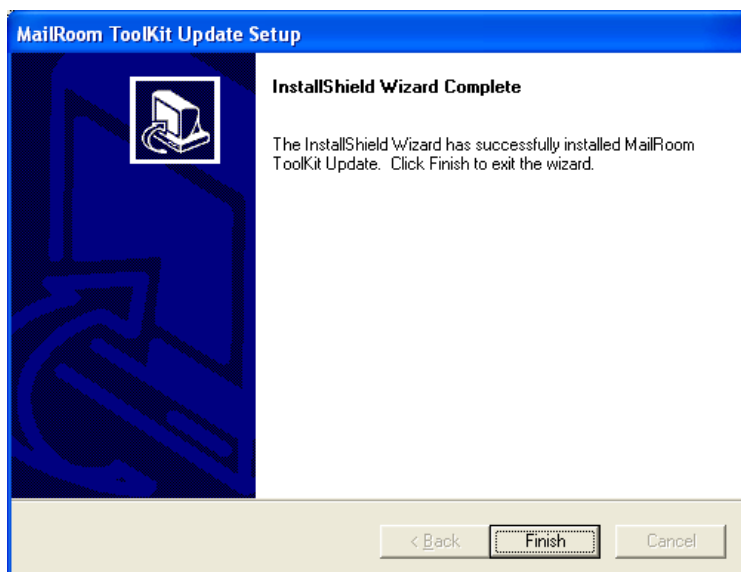
5. Click **Finish**.

6. You must repeat the *MailRoom ToolKit* installation steps on each workstation on which you plan to run **AddressAccelerator**.

Setting a Country's Availability for AddressAccelerator

Access a country record through the International page of *Configuration*.

The **Addresses with this country are eligible for address validation** checkbox is visible only if you have *AddressAccelerator*. Marking this checkbox means that addresses for this country are available for validation through the service.
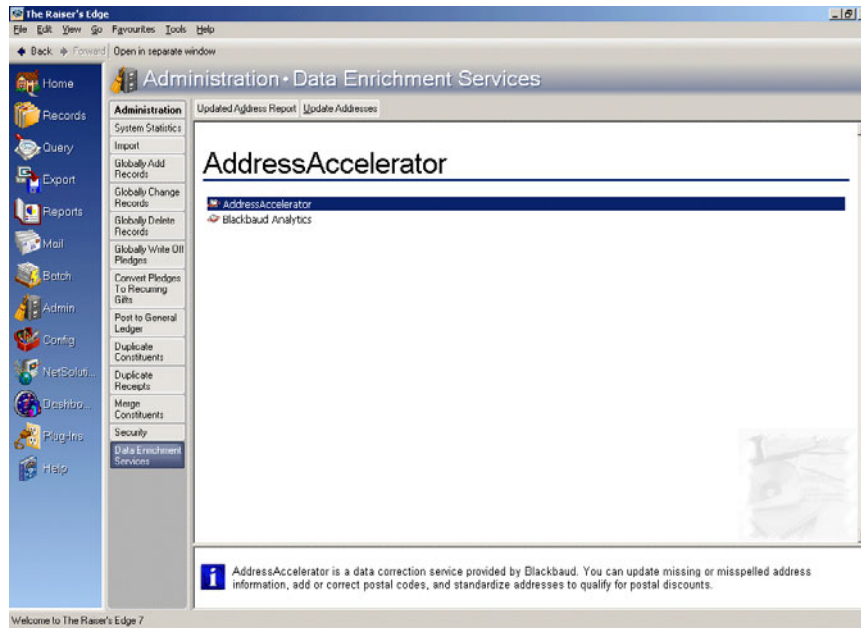
The checkbox defaults to marked for your country and unmarked for all other countries. If you mark the checkbox for another country, you need to obtain the *AddressAccelerator* version for that country (if one is available) to validate addresses in it.

If you set the business rule to automatically attempt to validate any address you edit, *AddressAccelerator* will attempt to validate only addresses in countries with this checkbox marked. For more information, see "Establishing a Business Rule to Automatically Update Addresses" on page 62.
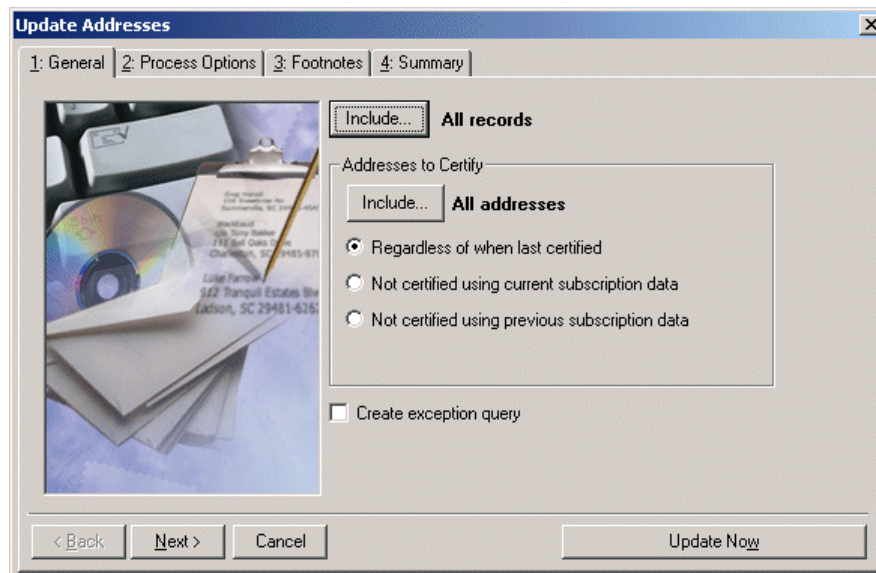
Selecting an Address Type

When you use *AddressAccelerator*, you need to select whether to update all address types or a specific address type for the constituents you select. For example, you can choose to validate every address entered on the Addresses tab of a constituent record or you can update a specific address type, such as the preferred address.

From the Data Enrichment Services page, click the **Update Addresses** button.

If you have not entered a data file location in User Options, a message appears when you click one of the links from the Data Enrichment Services page. You can enter a path to the data files there.
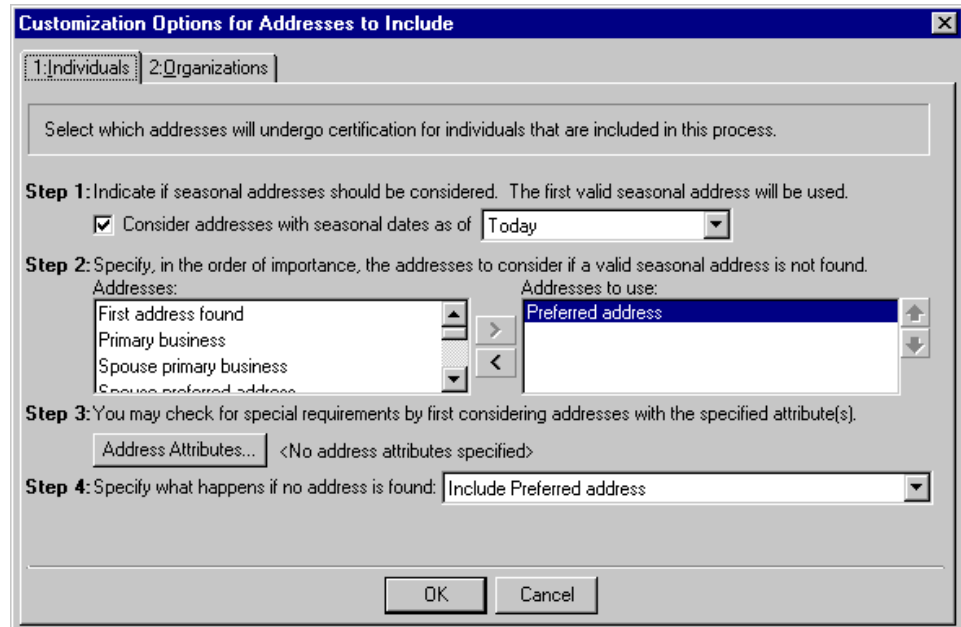

The Update Addresses screen appears.

Click the first **Include** button at the top of the screen to include either **All records**, **Selected records**, or **One record** for which to update addresses.

Addresses other than Canadian-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules. Only addresses formatted like Canadian addresses are included in the final processing. Foreign addresses will appear in an exception query.

In the **Addresses to Certify** frame, click **Include** to select which address types listed on a constituent record to update. You can update all or specified address types by selecting **All Addresses** or **Selected Addresses** from the submenu that appears. For example, you can update just the Preferred address, Primary business address, and First address in list. If you choose **Selected Addresses**, the Customization Options for Addresses to Include screen appears, so you can select the address type you want to update for each constituent. This screen has an Individuals tab and an Organizations tab.

Individuals Tab

Once you click **Include** in the **Addresses to Certify** frame on the Update Addresses screen and choose **Selected Addresses**, the Customization Options for Addresses to Include screen appears. On the Individuals tab of this screen, you need to select the address type to update for each individual constituent. The program selects an address for each individual using four steps and considers seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for an individual, you can select an alternate address to update. It is important to indicate your preferences in each of the four steps on the Individuals tab so the program can select the best address to update for each individual.

The Individuals tab is used to find addresses for individual constituents in your database. To select organization addresses to update, use the Organizations tab.

The addresses of each individual constituent in the mailing list are processed using the four steps on the Individuals tab. For example, you have three individual constituents in your mailing list: Larry Smith, Melvin Thomas, and Cindy Harris. When the program selects an address for each of these constituents, it begins with the first constituent in the list. To find an address for Larry Smith, the program compares Larry's addresses with the information you entered in steps 1 through 4. After the program finds a valid address for Larry, it uses steps 1 through 4 to find a valid address for Melvin Thomas.

Because the address used for each constituent is selected individually to find the best address on the constituent record, different address types may be selected for constituents in the mailing list. For example, according to the information you entered on the Individuals tab, the Preferred Address may be selected for Larry Smith; the Business Address may be selected for Melvin Thomas; and the Summer Home address may be selected for Cindy Harris.

Step 1. In Step 1, indicate whether seasonal addresses should be selected for the address update by marking the **Consider addresses with seasonal dates as of** checkbox. When you mark this checkbox, you need to select a date, such as Today, Yesterday, or <Specific date> in the corresponding field. When you select <Specific date>, the **Date** field appears so you can enter a date, such as 01/01/2006. The date information you enter is used to determine whether a seasonal address is valid. If seasonal addresses are considered, the program selects the first valid seasonal address it finds. If a valid seasonal address is not found, the program uses your selections in Step 2.

Step 2. In Step 2, specify the address types to consider if a valid seasonal address is not found in Step 1 or if you chose not to include seasonal addresses in the update. To select the address type to update, highlight an 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, you need to sort the address types in the order of their importance. To move an address type within the **Addresses to use** box, highlight the address type and click the up or down arrow, as necessary. For example, you can include the Preferred address and the Primary business address types by highlighting them in the **Addresses** box and clicking the single right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to update the Preferred address. Because the program selects the address to update based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the top of the list.

Step 3. In Step 3, you can use attributes to choose the address type to update by clicking the **Address Attributes** button. When you click **Address Attributes**, the Address Attributes to Consider screen appears.

On this screen, you can select an attribute category and description that must be present on an address record in order for the address to be considered for the update. For example, to update addresses with the attribute **Category** of Mailing Address and a **Description** of Lost Address, enter the information on this screen. For information about entering attributes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Step 4. In Step 4, select the address type the program should update if it cannot find an address type meeting your selections in Steps 1 through 3. You can select to include the preferred address, the first address listed on the Addresses tab on a constituent record, the primary business address, the primary spouse business address, or all user defined address types.

Organizations Tab

Once you click **Include** in the **Addresses to Certify** frame on the Update Addresses screen and choose **Selected Addresses**, the Customization Options for Addresses to Include screen appears.

On the Organizations tab of this screen, you need to select the address type to update for each organization constituent. The program selects an address for each organization using four steps and considers seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for an organization, you can select an alternate address to update. It is important to indicate your preferences in each of the four steps on the Organizations tab, so the program can choose the best address to update for each organization.

The addresses of each organization constituent in the mailing list are processed using the four steps on the Organizations tab. For example, you have three organization constituents in your mailing list: Baldwin Entertainment, City Insurance Company, and Outside Investments. When the program selects an address for each of these constituents, it begins with the first constituent in the list. To find an address for Baldwin Entertainment, the program compares Baldwin Entertainment's addresses with the information you entered in steps 1 through 4. After the program finds a valid address for Baldwin Entertainment, it uses steps 1 through 4 to find a valid address for City Insurance Company.

Because the address used for each constituent is selected individually, to find the best address on the constituent record, different address types may be selected for constituents in the mailing list. For example, according to the information you entered on the Individuals tab, the Preferred Address may be selected for Baldwin Entertainment, the Business Address may be selected for City Insurance Company, and the Mailing Address may be selected for Outside Investments.

Step 1. In Step 1, indicate whether to update the address of an organization's contact or the address of the organization. Your selection in Step 1 affects the rest of the steps on this tab. If you select **Print only the organization**, the Organizations tab appears as shown below.

If you select **Print contacts**, the Organizations tab appears as shown below.

Step 2. If you select in Step 1 to update only the organization's address, move the address types you want to update from the **Addresses** box to the **Addresses to use** box. To select the address type to update, highlight an 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, you need to sort the address types in the order of their importance. To move an address type within the **Addresses to use** box, highlight the address type and click the up or down arrow, as necessary. For example, you can include the Preferred address and the Primary business

address types by highlighting them in the **Addresses** box and clicking the single right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to update the Preferred address. Because the program selects the address to update based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the top of the list.

If you select in Step 1 to **Print contacts**, in Step 2:

a. You can specify the contact types you want to include by clicking **Contact Information** in Step 2. When you click this button, the Contacts to Print screen appears.
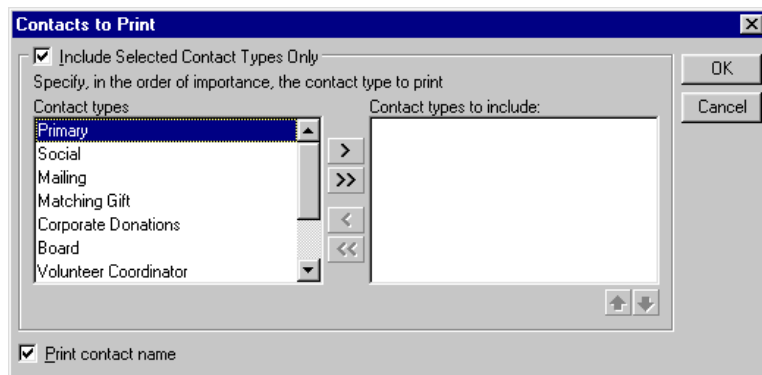
b. You can include all contact types or choose selected contact types. To select specific contact types, mark the **Include Selected Contact Types Only** checkbox. If you do not mark this checkbox, all contact types are considered for the update. To select the contact type you want to use, highlight the contact type in the **Contact types** box and click the single right arrow to move it to the **Contact types to include** box.

c. If you list multiple contact types in the **Contact types to include** box, you need to sort the contact types in the order of their importance. To move a contact type within the **Contact types to include** box, highlight the contact type and click the up or down arrow, as necessary. For example, some of your organizations may not have a matching gift coordinator. You can include the contact types Matching Gift Coordinator and Corporate Donations in the report by highlighting them in the **Contact types** box and clicking the single right arrow to move them to the **Contact types to include** box. If an organization has both contact types on its record, you want to update the address for the Matching Gift Coordinator. Because the program selects the contact type based on its position in the **Contact types to include** box, you need to use the arrows to move the Matching Gift Coordinator to the beginning of the list.

d. Mark the **Print contact name** checkbox to print the contact name with the address on the mailing pieces.

e. After you select all the contact types whose addresses you want to update, click **OK**. A display appears to the right of the **Contact Information** button listing the contact types you selected. If you did not specify any contact types, the label displays <All contact types>.

f. If you selected in Step 1 to update addresses for contacts, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button. When you click **Contact Address Attributes**, the Contact Attributes to Consider screen appears.

g. You can select an address attribute category and description that must be present on an address to be considered for the update. For example, if you want to include addresses with the address attribute **Category** of Mailing Address and a **Description** of Lost Address, enter the information on this screen. For more information about entering address attributes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. When you finish entering contact address attributes, click **OK**. A display appears to the right of the **Contact Address Attributes** button and lists the attributes you selected. When you do not specify any address attributes, the label displays <No contact address attributes specified>.

For detailed information about how to use contact address attributes, see the *Mail Guide* or click the help link on the screen.

Step 3. If you select in Step 1 to update only the organization's address, click the **Address Attributes** button if you want to include or exclude addresses based on attributes. When you click **Address Attributes**, the Address Attributes to Consider screen appears.

On this screen, you can select an attribute category and description that must be present on an address record in order for the address to be considered for the update. For example, to update addresses with the attribute **Category** of Mailing Address and a **Description** of Lost Address, enter the information on this screen. For information about entering attributes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

If you select in Step 1 to **Print contacts**, in Step_3, select what the program should do if it cannot find an address for the contact meeting your selections in Steps 1 or_2.

Contact Address Attributes entered on the Attributes tab of the Address screen of the contact's Relationship record are considered for filters, instead of regular attributes entered on the Attributes/Notes tab of the Relationship record. Access the Address Attributes tab by clicking the **Address** button on the General tab of the contact's Relationship record. If a contact's address does not qualify for the mailing because of the address attribute filters, the contact is removed from the mailing.

Ellipses appear at the end of the display if the contact types you selected do not fit in the area provided.

Ellipses appear at the end of the display if the attributes you selected do not fit in the area provided.

Step 4. If you select in **Step 1** to **Print only the organization**, you have a **Step_4**. In **Step 4**, you need to select what the program should do if it cannot find an address for the organization or contact meeting your selections in Steps 1 through 3. You can select to include the preferred address, the first address listed on the Address tab of a constituent record, the primary business address, the primary spouse business address, or all user-defined address types.

Updated Address Report

The Updated Address Report compares address information from the *AddressAccelerator* files with the addresses in your database. We recommend you run this report before you update addresses in your database to keep a record of the addresses that were updated and changed. It also may be helpful to keep track of what the former address was.

The Updated Address Report does not make any changes to the addresses in your database.

The Updated Address Report includes the constituent name and ID, current and updated address, address type, and additional information about the address update. For each address, the report also includes the footnotes assigned by *AddressAccelerator*.

➢ **Creating an Updated Address Report**

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

2. Click **Data Enrichment Services**. The Data Enrichment Services page appears. **AddressAccelerator** is highlighted.

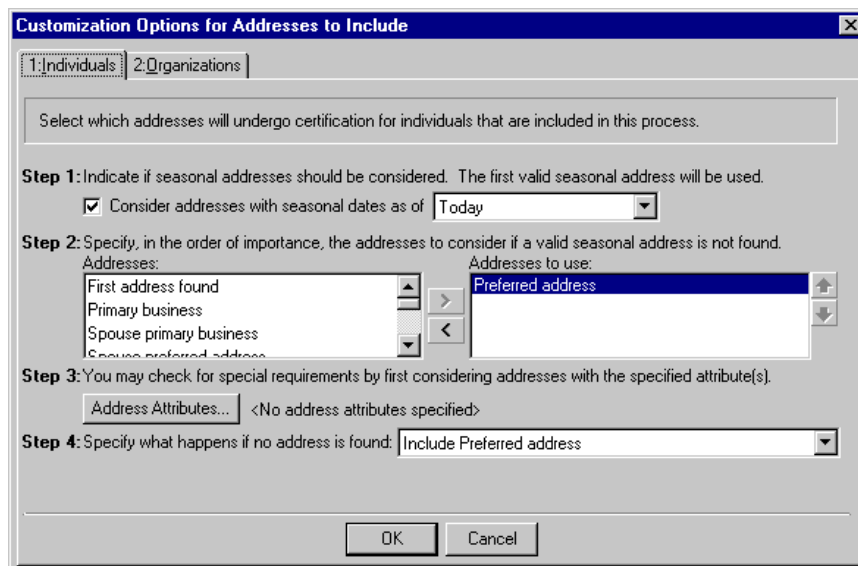3. On the action bar, click **Updated Address Report**. The Updated Address Report screen appears.

If you include all constituents, "All records" displays to the right of the **Include** button. If you include selected constituents, "Selected constituents" appears to the right of the **Include** button. If you include one constituent, the constituent's name appears to the right of the **Include** button.

If you include selected address types, only one address type is updated on each constituent record processed by *AddressAccelerator*. When you include all address types, every address type is updated on each constituent record processed by *AddressAccelerator*.

4. To select the constituents whose addresses you want to update, click **Include** at the top of the screen. You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears so you can locate the constituent whose address you want to update.

   For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about using the Open screen for constituents, see the Program Basics chapter of the *Program Basics Guide*.

5. To choose whether to compare all or selected address types for the constituents you selected, in the **Addresses to Certify** frame, click **Include**. If you choose **Selected addresses**, the Customization Options for Addresses to Include screen appears so you can select the address types you want to compare in the Updated Addresses Report. For more information, see "Selecting an Address Type" on page 13.

6. After selecting a specific address type to update, click **OK**. You return to the Updated Address Report screen. If you include all address types, "All addresses" displays to the right of the **Include** button. If you include selected address types, "Selected addresses" appears to the right of the **Include** button.

7. In the **Address to Certify** frame, select the addresses in your database to validate, based on when they were last certified.

8. In the **Report options** field, select whether you want to **Print** or **Preview** the Updated Address Report. If you select **Preview**, a preview screen of the report appears when the process finish so you can review it before printing it.

9. To create a static constituent query containing the names of the constituents whose addresses could not be certified, mark the **Create exception query** checkbox. We strongly recommend you mark this checkbox so you can correct the addresses or mark them as a lost address.

For more information about queries, see the Query chapter of the
Query & Export Guide.

10. Click **Next**. The Format tab displays fields and checkboxes you can use to format the report.

11. From the list on the left, select **Headings**. The Format tab displays options available for the headings of the Updated Addresses report.

12. In the **Title** field, enter a name for the report. For example, you can enter "AddressAccelerator Updated Address Report".

13. In the **Subtitle** field, you can enter a secondary or subtitle for the report. For example, you can enter "January Addresses".

14. In the **Align** field, select to align the titles on the page at the Centre.

15. To print your organization's name in the report heading, mark the **Print Organization name in header** checkbox.

16. To print page numbers in the report, mark the **Print Page Number in heading** checkbox. Then select "Page 1" as the **Format** and **Align** the page numbers Right.

17. To print the date you are running the report at the top of the page, mark the **Print Report Date in Heading** checkbox. **Format** the date as Short Date and **Align** the date to appear on the Left.

18. To print the report heading on every page of the report, mark the **Print report heading on each page** checkbox.

If you include the page number in the heading of the report, you must mark the **Print report heading on each page** checkbox so the page number prints at the top of every page in the report.

Updated Address Report

Tabs: 1: General   2: Format   3: Summary

Left list:
- Headings
- Criteria
- Detail
- Page Footer
- Report Footer
- Colour scheme

Heading Format

Title: Address Validation Updated Address Report

Subtitle: January Addresses

Align: Centre

☑ Print Organization name in header

☑ Print Page Number in Heading
Format: Page 1
Align: Right

☑ Print Report Date in Heading
Format: Short Date
Align: Left

☑ Print report heading on each page

< Back   Next >   Cancel   Create Report Now

19. From the list on the left, select **Criteria**.

20. To print the parameters, or settings, you established for this report to keep for your records, mark the **Print Report Criteria** checkbox. After you mark this checkbox, select the criteria you want to print by marking the checkbox next to the criteria name. For example, to print the filters used to create this report, mark the **Filters** checkbox. If you print report criteria, select whether you want to print this information on the first page of the report or a separate page.

21. From the list on the left, select **Detail**.

22. In the **Include** frame, select whether to include **Changed Addresses**, **Exceptions**, or **Both** in the Updated Addresses report. If you select **Changed Addresses**, the report includes only addresses that have been modified in the address update. When you select **Exceptions**, the report includes only addresses that generated exceptions and were unable to be corrected. If you select **Both**, changed addresses and exceptions appear in the Updated Address Report.

23. In the **Address Capitalization** frame, you can choose whether to capitalize the entire address or to use proper case. When you choose **Proper case entire address**, *AddressAccelerator* uses upper and lower case in the appropriate places. Mailings with standardized addresses, which include no punctuation and capitalization throughout the address, are eligible for discounts offered by the Canada Post. For more information, contact the Canada Post.

    For this example, select **Capitalize entire address**.

24. To print the address information currently stored on a constituent record, mark the **Include current address information** checkbox.

25. From the list on the left, select **Page Footer**. On the right, you can enter a page footer, page number, or date that prints at the bottom of every page in the report.

26. From the list on the left, select **Report Footer**. On the right, you can enter text that appears at the bottom of the last page in the Updated Addresses report. In the **Align** field, select whether the program should align the text to the Left, Right, or Centre.


27. From the list on the left, select **Colour scheme**.

28. To add colour to the headings of the report, mark the **Apply a Colour Scheme** checkbox. To select a colour, click the colour box next to a heading type. The Colour screen appears.

29. Click the colour you want to use and click **OK**. You return to the Updated Address Report screen. Select colours you want to use for the column heading background and foreground colour and the group heading background and foreground colour.
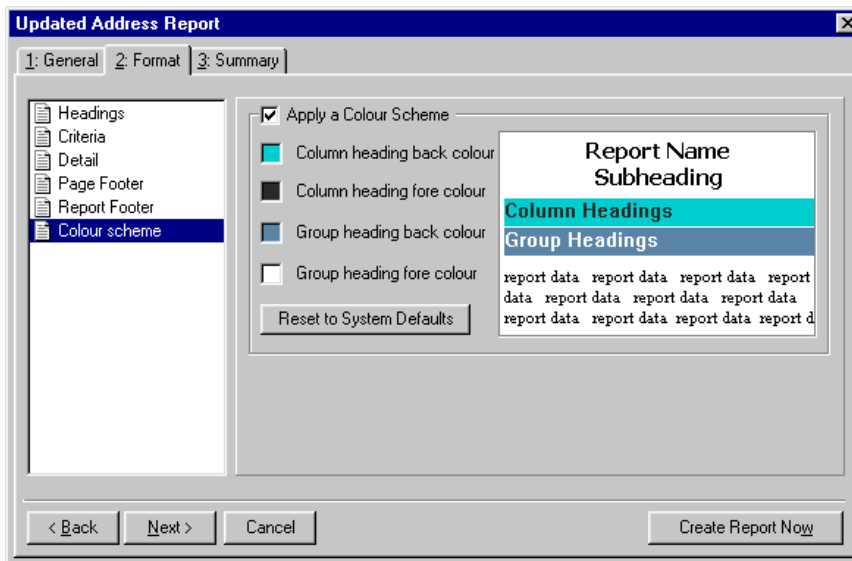
30. Click **Next**. The Summary tab displays a summary of options you selected for the Updated Address report. If the options listed in the summary are not correct, click **Back** to change the options selected.
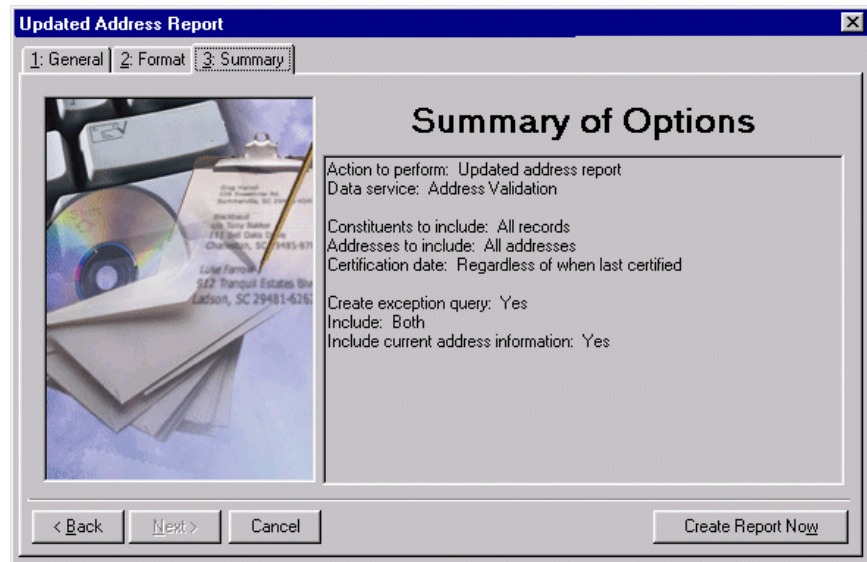
31. To begin processing the report, click **Create Report Now**. While the program compiles the report, a progress indicator appears. You can click **Cancel** to stop the report processing.
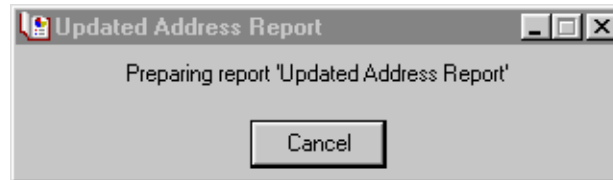
32. If you marked the **Create output query** checkbox on the General tab, the Save Static Query screen appears.

33. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter "Exception Addresses".

34. In the **Description** box, further describe the contents of this query. For example, you can enter "Exception addresses from the Updated Address Report for the 2006 annual mailing".
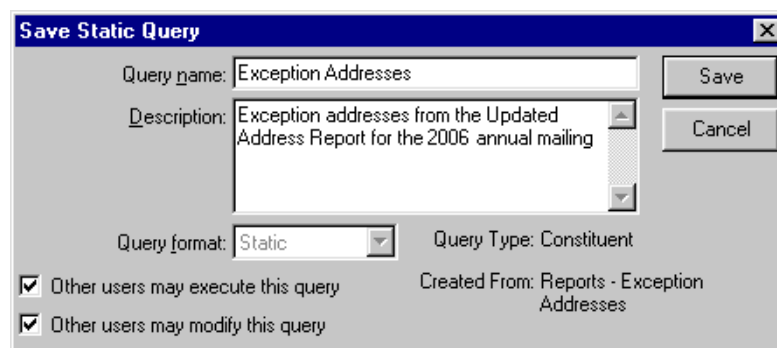
35. In the **Query format** field, the program defaults to "Static" and disables the field. Output queries must be static because they do not change. For more information about static queries, see the Query chapter of the *Query & Export Guide*.

36. To allow other users to use or change this query, mark the **Other users may execute this query** and **Other users may modify this query** checkboxes. It is helpful for others to have access to the queries you create for possible use in the future.

37. Click **Save**. If you selected to preview the Updated Address report, the report previews on screen. You can print this report by clicking **Print** at the top of the preview screen.

If you selected to print the Updated Address report, it prints to your default printer.

38. To close the preview screen, click the "X" in the top right corner. You return to the Data Enrichment Services page.
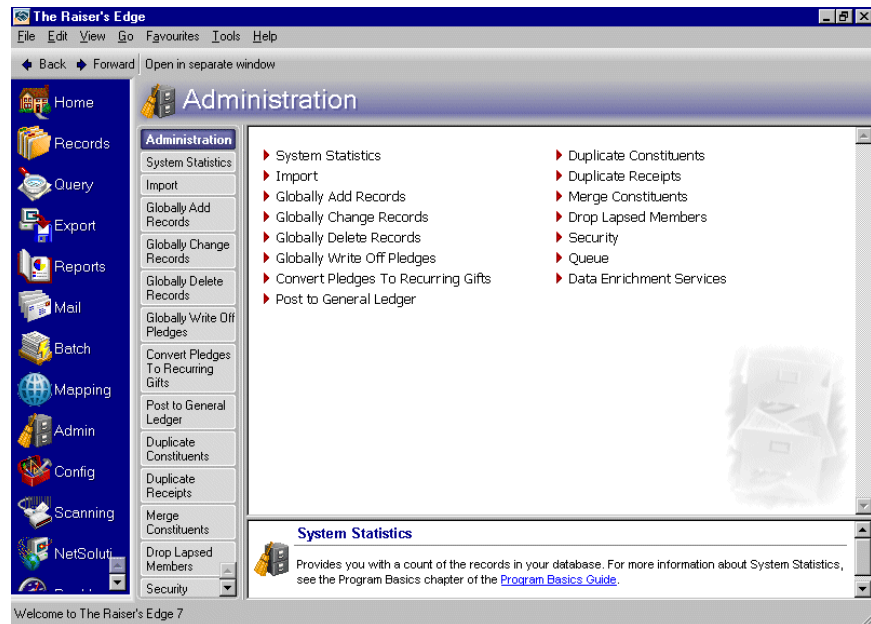
Updating Addresses

Once you verify the information on the Updated Address Report, you are ready to update constituent addresses. You can either update addresses one record at a time using **Interactive** mode or as a group using the **Batch** mode.

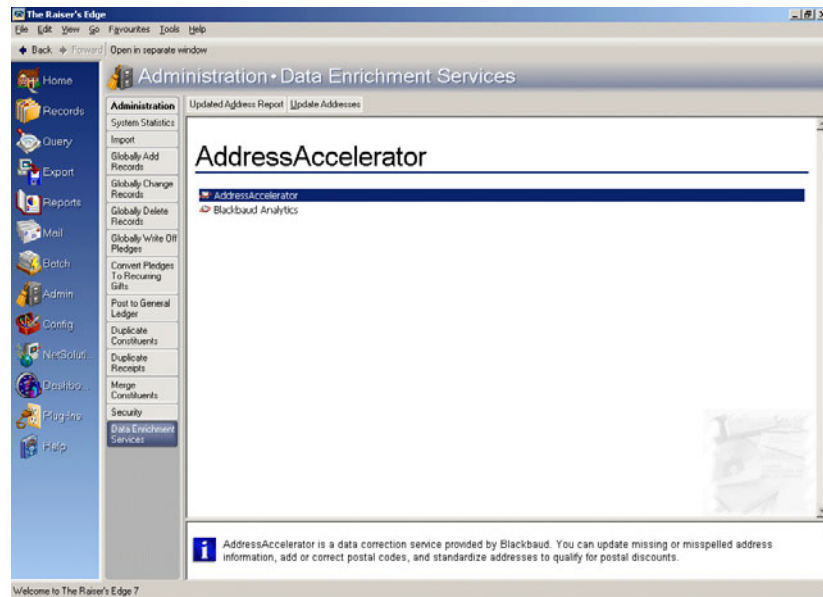## Updating Addresses Using Batch Mode

You can verify all addresses in a mailing list at one time using the **Batch mode**. When you use **Batch mode**, you select preferences for address certification that apply to all addresses in the mailing list. Then, the program updates all the addresses without any further data entry.

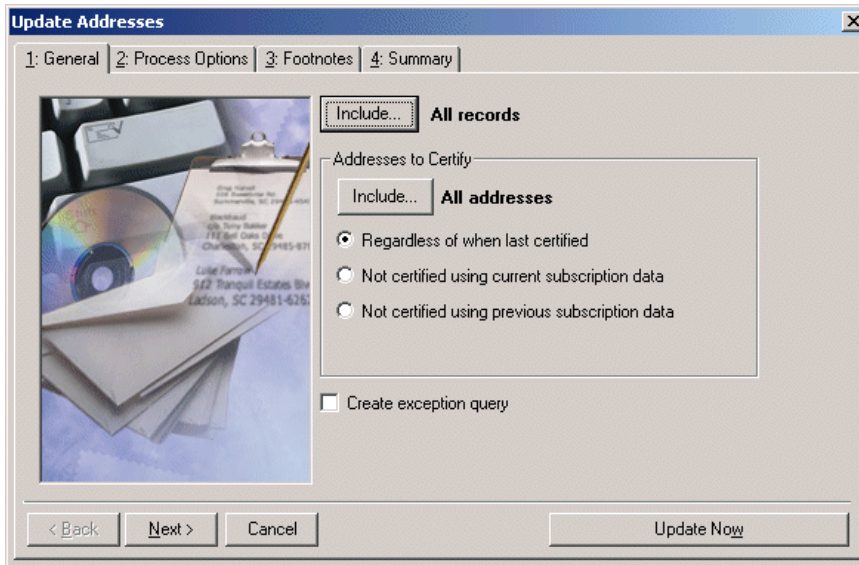➢ **Updating addresses in the database using Batch mode**

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

2. Click **Data Enrichment Services**. The Data Enrichment Services page appears. **AddressAccelerator** is highlighted.

3. On the action bar, click **Update Addresses**. The Update Addresses screen appears.

4. To select the constituents whose addresses you want to update, click **Include** at the top of the screen. You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears so you can locate the constituent whose address you want to update.

   For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

5. In the **Addresses to Certify** frame, click **Include** to choose whether to compare all or selected address types for the constituents you selected.

If you include all constituents, "All records" displays to the right of the **Include** button. If you include selected constituents, "Selected constituents" appears to the right of the **Include** button. If you include one constituent, the constituent's name appears to the right of the **Include** button.

If you include selected address types, only one address type is updated on each constituent record processed by *AddressAccelerator*. When you include all address types, every address type is updated on each constituent record processed by *AddressAccelerator*.

If you choose **Selected addresses**, the Customization Options for Addresses to Include screen appears so you can select the address types you want to compare in the Updated Addresses Report. For more information, see "Selecting an Address Type" on page 13.

6. After selecting a specific address type to update, click **OK**. You return to the Update Addresses screen. If you include all address types, "All addresses" displays to the right of the **Include** button. If you include selected address types, "Selected addresses" appears to the right of the **Include** button.

7. In the **Address to Certify** frame, select the addresses in your database to validate, based on when they were last certified.

8. To create a static constituent query containing the names of the constituents whose addresses could not be updated, mark the **Create exception query** checkbox. We strongly recommend you mark this checkbox so you can correct the addresses or mark them as lost addresses. For more information about queries, see the Query chapter of the *Query & Export Guide*.

9. Click **Next**. The Process Options tab displays options you must specify before you can update the addresses.

10. In the **Processing Mode** frame, select **Batch mode**. When you choose **Batch mode**, the program updates all the addresses at one time. If an address cannot be updated, an exception query is created.

11. In the **Address Capitalization** frame, choose whether to capitalize the entire address or use proper case. When you choose **Proper case address**, *AddressAccelerator* uses upper and lower case in the appropriate places. Mailings with standardized addresses, which include no punctuation and capitalization throughout the address, are eligible for discounts offered by the Canada Post. For more information, contact the Canada Post.

12. To print the Statement of Accuracy report to confirm the addresses are correct and certified, in the **Reporting Options** frame, mark the **Print SOA form** checkbox. You need to enter your CPC number the Canada Post gives you for your discounts on the General page in *Configuration* so it prints on the SOA report.

13. To create a report containing information about the updated addresses, in the **Reporting Options** frame, mark the **Create control report** checkbox. If you mark this checkbox, select whether to **Print** or **Preview** the report. If you select **Preview**, a preview screen of the report appears so you can view it before printing it.

    The control report contains the constituent name and ID, address and type, report date, and an exception code where applicable for each constituent processed by *AddressAccelerator*. We recommend you print a control report so you have a record of the addresses that were updated.

When you use a mail task in *Mail*, you can mark the **Print mailing in ALL CAPS** checkbox on the Format tab if you want to modify the case for a specific mailing without changing the capitalization of the addresses entered on the constituent record. For more information, see the *Mail Guide*.

Any information you enter in the **Add the Following to New Certified Addresses** frame and the **Save Old Address in Constituent Address List** frame is added for all addresses processed in the update.

When updating all addresses for a constituent in Batch mode, we strongly recommend you do not enter information in the **Address type** field in the **Add the Following to New Certified Addresses** frame because all addresses for the constituent are changed to the type you select.

If an attribute with the **Category** of AddressAccelerator Footnote already exists on a constituent's address, the existing attribute is not updated, but the additional attribute is added to the grid.

14. In the **Add the Following to New Certified Addresses** frame, enter the **Address type**, **Info source**, **Date from**, and **Date to** information you want to add in the corresponding fields in the **Address Information** frame on the Address screen of a constituent record. You can leave any of the fields in this frame blank if you do not want to update the information for an address on the constituent record. For more information about the address screen of a constituent record, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

15. If you want to save the original address on the Addresses tab of a constituent record, mark the **Save Old Address in Constituent Address List** checkbox. When you mark this checkbox, enter the **Address type**, **Info source**, **Date from**, and **Date to** information for the old address.

    You can leave any of the fields in the **Save Old Address in Constituent Address List** frame blank if you do not want to change the information entered for the original address. For example, if an address has "Personal friend" entered in the **Info source** field, you can leave the **Info source** field in the **Save Old Address in Constituent Address List** frame blank if you do not want to update the information.

16. Click **Next**. On the Footnotes tab, you can specify the footnote flags you want to add as address attributes.

17. To select a footnote flag to add as an address attribute, highlight the footnote flag in the **Available Footnote Flags** box and click the single right arrow to move it to the **Footnote Flags to Add as Address Attributes** box. The footnote flag appears with the **Category** of AddressAccelerator Footnote and a **Description** of the specific footnote flag that applies to the address. After you finish certifying addresses, you need to locate all addresses with an attribute **Category** of AddressAccelerator Footnote and correct any problems with them. After correcting an address, we recommend deleting the attribute.

18. If you add any footnote flags as address attributes, enter a date to associate with the attribute in the **Date to use for attributes** field. When you select <Specific date>, the **Date to use** field appears so you can enter a date, such as 01/01/2006. In the **Comment** field, enter any comments you want to associate with the attribute. For example, you may want to add the comment "Footnote flag from address update on 01/01/2006."

19. Click **Next**. The Summary tab displays a summary of options you selected. If the options listed in the summary are not correct, click **Back** and make your changes.

20. To begin updating the addresses in your mailing list, click **Update Now**.

21. If you marked the **Create exception query** checkbox on the General tab, the Save Static Query screen appears.

22. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter "Exception Addresses".

23. In the **Description** box, further describe the contents of this query. For example, you can enter "Exception addresses for the 2006 annual mailing".

Addresses other than Canadian -formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules.

24. In the **Query format** field, the program defaults to "Static" and disables the field. Output queries must be static because they do not change. For more information about static queries, see the Query chapter of the *Query & Export Guide*.

25. To allow other users to use or change this query, mark the **Other users may execute this query** and **Other users may modify this query** checkboxes. It is helpful for others to have access to the queries you create for possible use in the future.

26. Click **Save**. The Updating Addresses message appears.
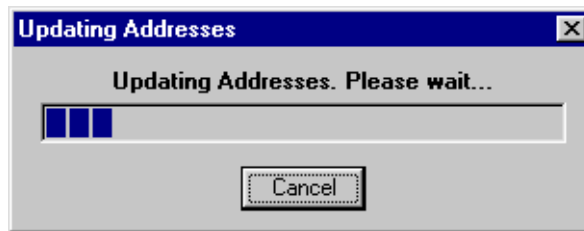
27. When the program finishes updating addresses in your database, a summary screen appears, displaying the results of the update.

28. To close the summary screen and complete the address update, click **Close**.

Updating Addresses Using Interactive Mode

When you choose to update addresses in your database using Interactive mode, the AddressFinder screen appears for each address you choose to validate. From this screen, you can change all or part of the address entered in your database with the certified address.

If enough valid address information exists for the program to automatically update and validate the address, the AddressFinder screen appears. For example, if you are missing the postal code, but all other address information is correct, the AddressFinder screen appears with the updated postal code. You do not need to search for the entire correct address on the Postal Code Browser screen.

If an address cannot be certified, the Postal Code Browser screen appears over the AddressFinder screen so you can search for a correct address. Once you find and select an address to use on the Postal Code Browser screen, you return to the AddressFinder screen so you can update the address permanently in your database. For more information, see the section "AddressFinder Screen" on page 37. For information about searching for correct addresses, see the section "Postal Code Browser Screen" on page 38.

AddressFinder Screen

From the AddressFinder screen, you update the corrected address in the database.

If the address cannot be certified, the Postal Code Browser screen appears over the AddressFinder screen so you can search for a correct address. Once you find and select an address to use on the Postal Code Browser screen, you return to the AddressAccelerator screen. For information, see the section "Postal Code Browser Screen" on page 38.

Current Address Information. The **Current Address Information** frame lists the address information currently entered on the constituent record.

Address, City, Province, Postal Code. The address fields on the left of the screen contain the updated address information you select on the Postal Code Browser screen. Or, if the address cannot be updated, these fields contain the same information entered on the constituent record. This information also appears in the **Current Address Information** frame above.

Add footnote as an address attribute. Mark the **Add footnote as an address attribute** checkbox to copy a footnote flag to the constituent record as an address attribute. If you are not able to validate an address, footnote flags indicate the reason the address cannot be validated. The footnote flag appears as an address attribute with the **Category** of AddressAccelerator Footnote and a **Description** of the footnote flag.

Footnote flag field. The field below the **Add footnote as an address attribute** checkbox contains the reason, or footnote flag, an address cannot be validated. For example, it may say Invalid address. If you mark the checkbox above, this footnote is recorded on the address record as an address attribute so you can track it or do further research later.
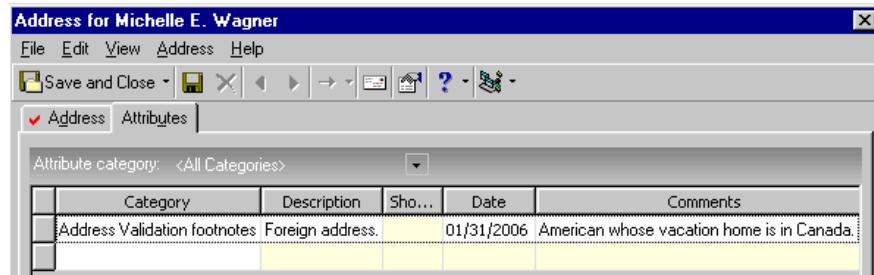
Date To Use. When you add an address attribute for an address, in the **Date To Use** field, select the date you want to enter in the **Date** field of the attributes grid.

Comment. In the **Comment** field, enter any comments you want to associate with the attribute. For example, you may want to add the comment "Footnote flag from address update on 01/01/2006".

Validate. Click **Validate** to validate the address in the address fields in the frame at the bottom of the screen, making it eligible for discounts. An address can only be validated if it is correct and is entered in proper case. If the address that appears is validated, or certified, the **Validate** button is disabled.

Copy original address to alternate. Mark this checkbox to copy the original uncertified address as an alternate address on a constituent record.

Update Address. Click **Update Address** to update the address in your database.

Skip. Click **Skip** to skip updating the current address on the screen. You go to the next address. The Process Complete screen at the end of the address update tells you how many records were skipped.

Auto. Click **Auto** to switch to updating addresses using Batch mode. Once you change from Interactive mode to Batch mode, you cannot switch back again.

Cancel. When you click **Cancel**, a message appears asking if you are sure you want to cancel. If you click **Yes** on this message, the Process Complete screen appears, summarizing the records processed so far. When you close that screen, you return to the Data Enrichment Services screen.

Postal Code Browser Screen

Before you can update an address on the AddressAccelerator screen, you need to use the Postal Code Browser screen to search for the correct address. The Postal Code Browser screen appears when you click **Yes** on the message that appears from the AddressAccelerator screen, asking if you want to search for the invalid address.

The bottom portion of the Postal Code Browser screen lists all available street names for the criteria entered in the address fields in the **Find Criteria** frame on the top right of the screen. Information entered on the constituent record or in the batch defaults into the address fields in the **Find Criteria** frame.

Original Address. The **Original Address** frame lists the existing address on the constituent record.

Find Criteria. The **Find Criteria** frame includes all address fields. Enter information in these fields to search for the correct address to use. The existing address information defaults into these fields. Delete information in one or more fields to broaden your search for better results.

Find Now. Click **Find Now** to search for a correct address matching the search criteria you entered in the address fields in the **Find Criteria** frame. The results of possible addresses display in the bottom portion of the screen.

Clear. Click **Clear** to clear all information from the fields in the **Find Criteria** frame.

Revert. Click **Revert** to change the address information in the **Find Criteria** fields back to what originally defaulted in (the address information currently entered on the constituent record).

Update. Click **Update** once you find and highlight the address you want to use from the list on the bottom of the screen. You return to the AddressAccelerator screen.

Cancel. Click **Cancel** to cancel the address search. You return to the AddressAccelerator screen.

Number. Number refers to the street number in the address.

Street Name. Street name is the street or road in the address.

Type. The **Type** column refers to whether the street is called a street, road, avenue, way, etc.

Direction. Direction denotes if the address is located South, North, East, or West. on the street (if the direction is part of the official address). Direction as part of an address is generally abbreviated; for example, N.

Suffix. Suffix refers to the street number suffix, if applicable to an address. This is any additional information that may be part of the street address.

Suite. A suite would be, for example, Suite 310 in an office complex.

P O Box. P O Box stands for Post Office Box and may be part of an address.

Route. A route refers to a rural route in an address, if applicable.

Municipality. The municipality is also known as the city.

Province. The **Province** column lists the province where the address is located.

Postal Code. The postal code is the six-character number and letter-combination code assigned to addresses in a specific delivery area. It is an integral part of every address; for example, M4B 1G5.

➢ **Updating addresses in the database using Interactive mode**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
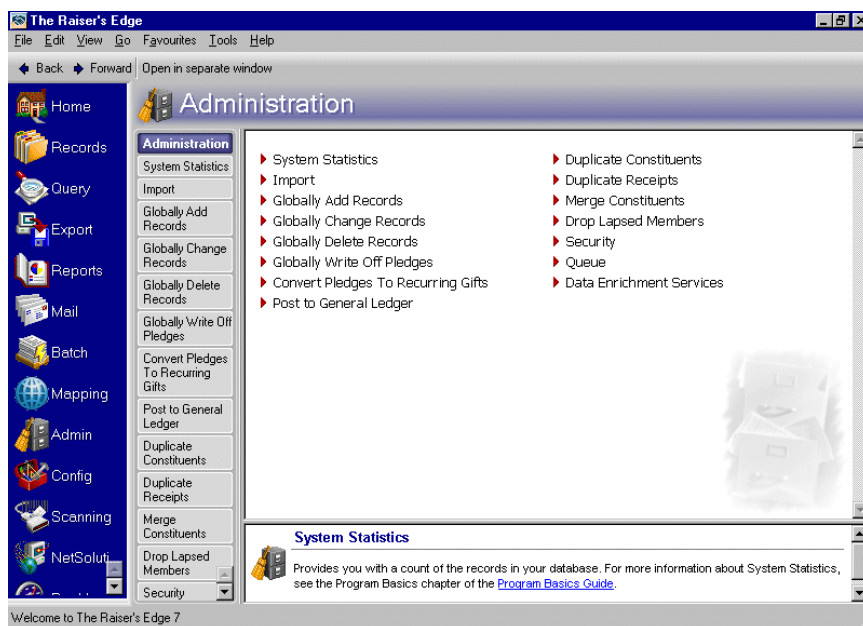
2. Click **Data Enrichment Services**. The Data Enrichment Services page appears. **AddressAccelerator** is highlighted.
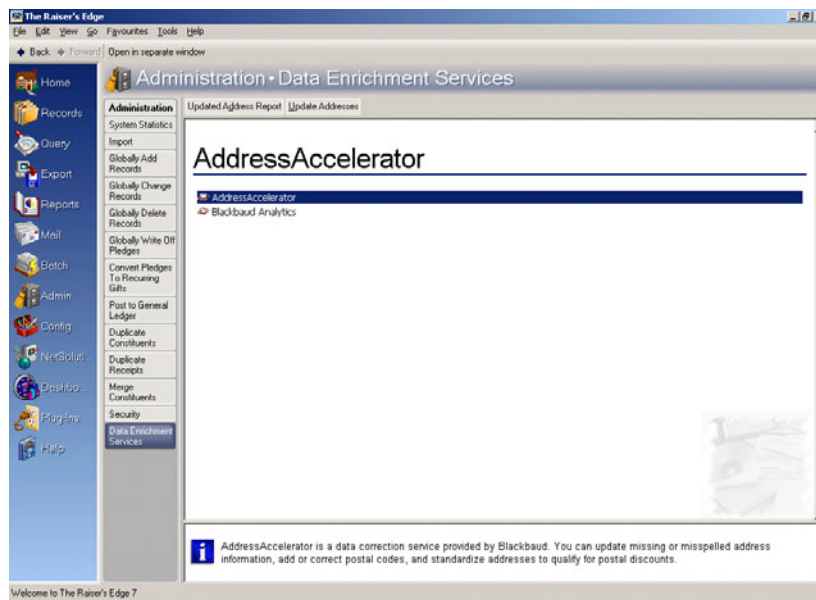
3. On the action bar at the top of the Data Enrichment Services page, click **Update Addresses**. The Update Addresses screen appears.
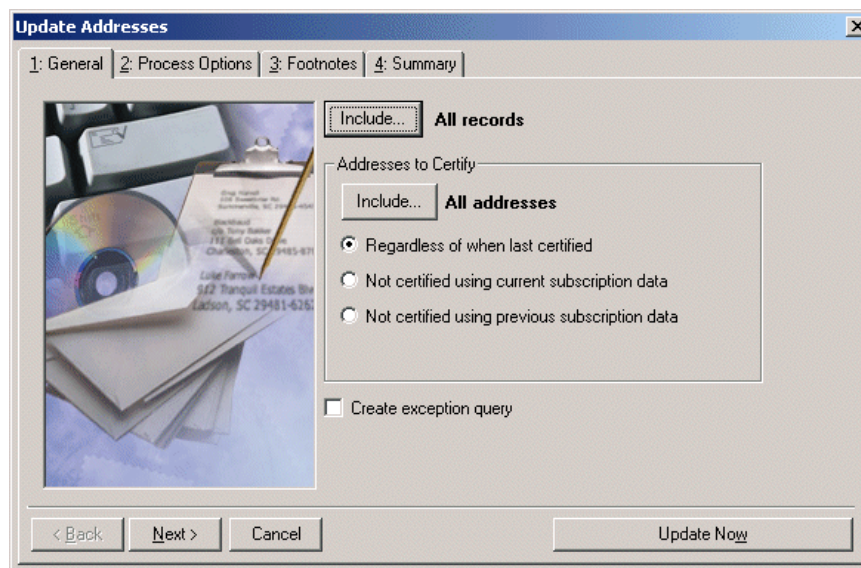
4. To select the constituents whose addresses you want to update, click **Include** at the top of the screen.

If you include all constituents, "All records" displays to the right of the **Include** button. If you include selected constituents, "Selected constituents" appears to the right of the **Include** button. If you include one constituent, the constituent's name appears to the right of the **Include** button.

You can include **All Records**, **Selected Records**, or **One Record**. If you choose **Selected Records**, the Open Query screen appears so you can select a query containing the constituents whose addresses you want to update. If you select **One Record**, the Open screen for constituents appears so you can locate the constituent whose address you want to update.

For more information about creating a query, see the Query chapter of the *Query & Export Guide*. For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

5. In the **Addresses to Certify** frame, click **Include** to choose whether to compare all or selected address types for the constituents you selected. If you choose **Selected addresses**, the Customization Options for Addresses to Include screen appears so you can select the address types you want to compare in the Updated Addresses Report. For more information, see "Selecting an Address Type" on page 13.

6. After selecting a specific address type to update, click **OK**. You return to the Update Addresses screen. If you include all address types, "All addresses" displays to the right of the **Include** button. If you include selected address types, "Selected addresses" appears to the right of the **Include** button.

If you include selected address types, only one address type is updated on each constituent record processed by *AddressAccelerator*. When you include all address types, every address type is updated on each constituent record processed by *AddressAccelerator*.

7. In the **Addresses to Certify** frame, select the time period you want to use to determine whether the program should validate an address. You can choose to validate addresses based on when they were last certified.

8. To create a static constituent query containing the names of the constituents whose addresses could not be updated, mark the **Create exception query** checkbox. We strongly recommend you mark this checkbox so you can correct the addresses or mark them as lost addresses.

9. Click **Next**. The Process Options tab displays options, checkboxes, and fields you must specify before you can update the addresses.

10. In the **Processing Mode** frame, select **Interactive mode**. When you select **Interactive mode**, you can view each address before accepting the changes.

11. In the **Address Capitalization** frame, choose whether you want to capitalize the entire address or use proper case. When you choose **Proper case address**, *AddressAccelerator* uses upper and lower case in the appropriate places. Mailings with standardized addresses, which include no punctuation and capitalization throughout the address, are eligible for discounts offered by the Canada Post. For more information, contact the Canada Post.

12. In the **Reporting Options** frame, mark the **Print SOA form** checkbox to print the Statement of Accuracy (SOA) to confirm the addresses are SERP-certified. You need to enter your CPC number the Canada Post gives you for your discounts on the General page in *Configuration* so it prints on the SOA report.

13. In the **Reporting Options** frame, mark the **Create control report** checkbox to create a report containing information about the updated addresses. If you mark this checkbox, select whether to **Print** or **Preview** the report. If you select **Preview**, a preview screen of the report appears so you can view it before printing.

    The control report contains the constituent name and ID, address and type, report date, and an exception code where applicable for each constituent processed by *AddressAccelerator*. We recommend you print a control report so you have a record of the addresses that were updated.

When you use a mail task in *Mail*, you can mark the **Print mailing in ALL CAPS** checkbox on the Format tab if you want to modify the case for a specific mailing without changing the capitalization of the addresses entered on the constituent record. For more information, see the *Mail Guide*.

When updating all addresses for a constituent, we strongly recommend you do not enter information in the **Address type** field in the **Add the Following to New Certified Addresses** frame because all addresses for the constituent are changed to the type you select.

14. In the **Add the Following to New Certified Addresses** frame, enter the **Address type**, **Info source**, **Date from**, and **Date to** information you want to add in the corresponding fields in the **Address Information** frame on the Address screen of a constituent record. You can leave any of the fields in this frame blank if you do not want to update the information for an address on the constituent record.

    For example, in the **Address type** field, select "Home".

    For more information about the Address screen, see the Biographical Information chapter of the *Constituent Data Entry Guide*.

15. The **Info source** field notes where you got your address changed information. In the **Info source** field enter "AddressAccelerator". When you leave the field, the following message appears.
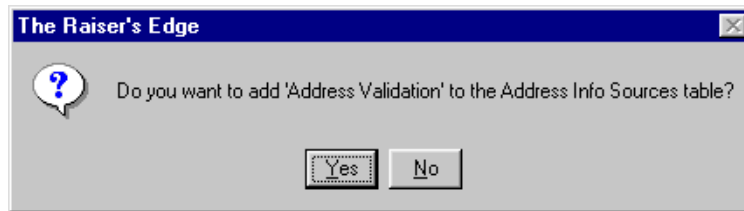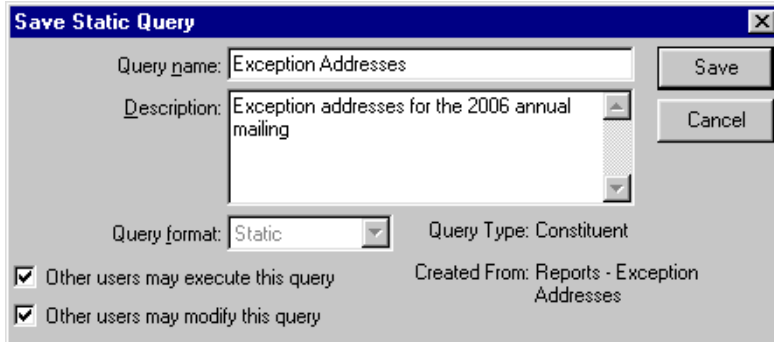
16. To add this selection to the table, click **Yes**.

    Because you are updating addresses now, today's date defaults into the **Date from** field.

17. In the **Date to** field, enter through when you want this address update to be valid. Your organization updates addresses regularly every three months to keep your database current and correct, enter the date "03/21/2006".

    The frame on the right is disabled when you select **Interactive mode**. When using Interactive mode, you make these selections on the AddressAccelerator screen.
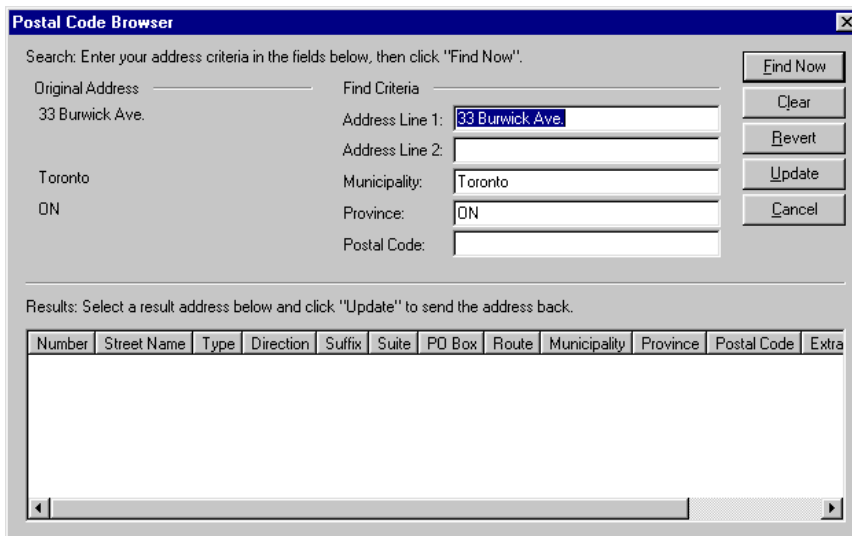
18. To begin updating the addresses in your mailing list, click **Update Now**.

19. If you marked the **Create output query** checkbox on the General tab, the Save Static Query screen appears.

20. In the **Query name** field, enter a name that describes the contents of this query. For example, you can enter "Exception Addresses".

21. In the **Description** box, further describe the contents of this query. For example, you can enter "Exception addresses for the 2006 annual mailing".

22. In the **Query format** field, the program defaults to "Static" and disables the field because output queries must be static. For more information about static queries, see the Query chapter of the *Query & Export Guide*.

23. To allow other users to use or change this query, mark the **Other users may execute this query** and **Other users may modify this query** checkboxes. It is helpful for others to have access to the queries you create for possible use in the future.

24. Click **Save**.

25. If the existing address is certified, the AddressFinder screen appears, allowing you to review the address information before click **Update Address**; if the existing address cannot be certified, the Postcode Browser screen appears, so you can search for a correct address. The existing address information defaults into the fields in the **Find Criteria** frame.

26. If no possible addresses matching the criteria in the **Find Criteria** frame appear at the bottom of the screen, you need to adjust your criteria to broaden your search for possible correct addresses.

27. For example, if 33 Burwick Ave appears in the **Address Line 1** field, you can highlight just the street name "Burwick" and delete it. You are left with "33 Ave." in the **Address Line 1** field.

28. Click **Find Now**. For the example shown here, the program searches for all possible matching addresses with the criteria of street number "33", a street type of "Avenue", located in "Toronto, Ontario". The possible address matches appear in the grid at the bottom of the screen. For an explanation of the columns in the grid at the bottom of the screen, see "Postal Code Browser Screen" on page 38.

29. Highlight the row in the grid at the bottom of the screen that matches the street address entered in the **Address** field. For the previous example, scroll down to "Berwick Ave". The address was spelled incorrectly when it was entered in the database and that is why it could not be found or certified. Highlight the "Berwick Ave" row in the grid.

30. Double-click the row. The correct address fills in the appropriate fields in the **Find Criteria** frame at the top right of the screen.

31. Click **Update**. The AddressFinder screen appears with the updated address information you select on the Postal Code Browser screen in the address fields at the bottom of the screen. The original address still entered on the constituent record appears in the **Current Address Information** frame at the top of the screen.

32. If you are not able to validate an address, mark the **Add footnote as an address attribute** checkbox on the AddressFinder screen. The field below contains a footnote flag to indicate the reason the address could not be certified. The footnote flag appears as an address attribute with the **Category** of AddressAccelerator Footnote and a **Description** of the footnote flag on the Attributes tab of the address screen accessed from the constituent record.

The fields at the bottom of the screen are editable. You can enter or change address information in these fields and then click **Validate** to validate the address information you enter.

33. If you add any footnote flags as address attributes, enter a date to associate with the attribute in the **Date To Use** field.

34. To update the address on a constituent record, click **Update Address**. If the **Update Address** button is disabled, the address entered in the **Current Address** frame is not a certifiable address.

35. Continue following these steps for each address to be processed. If you cannot validate an address for a constituent, click **Skip**.

36. If you want to switch from certifying addresses using **Interactive mode** to certifying addresses using **Batch mode**, click **Auto**. When you switch to Batch mode, *AddressAccelerator* goes through and certifies addresses automatically. You do not see each screen or have access to manually change the addresses from the address update. For more information about Batch mode, see "Updating Addresses Using Batch Mode" on page 29.

37. When you finish updating addresses, if you selected to **Preview** or **Print** a control report in the **Reporting Options** frame on the Process Options tab, an Update Address Report preview screen appears. The Update Address Report lists the addresses you updated and the available footnotes. If you select **Preview**, a preview screen of the report appears so you can view it before printing it.

38. To print the Update Address Report from the preview screen, click **Print** on the toolbar.

39. To close the Update Address Report preview screen, click the "X" in the top right corner.

40. If you checked the **Print SOA form** checkbox in the **Reporting Options** frame on the Process Options tab, the SOA report prints to your default printer. The SOA report needs to accompany your mailing to prove a certain percentage of your mailing has certified addresses, to qualify for discounts. You need to enter your CPC number the Canada Post gives you for your discounts on the General page in *Configuration* so it prints on the SOA report.

Statement of Accuracy

This report was generated by SERP (Software Evaluation and Recognition Program) certified software in conjunction with current Canada Post Address database information.

Customer Name and Information: **Preparation date:**

Nonprofit Organization   2006/02/27
110 Broad Street
Regina SK S4P 4A2

CPC Number   186**3210**

Records processed:

Type	Total	Certified	Accuracy Level
Urban	6	2	
Rural	18	4	
Total	**24**	**6**	25.0%

Accuracy data expires on 2007/02/27.

Mailing preparation software:

Blackbaud

Copyright 2000 Satori Software, Inc.

41. When you finish certifying addresses in your database and printing reports, if you selected to do so, The Process Complete screen appears, displaying the results of the update.

42. To close the summary screen and complete the address update, click **Close**. You return to the Data Enrichment Services page.

Correcting Addresses from a Record

You can look up and correct a specific address directly from a constituent, participant, relationship or address record using *AddressAccelerator*. When you update an address from the constituent record using *AddressAccelerator*, the corrected address is SERP certified, qualifying your mailing for discounts. You can access the address lookup screen from the constituent record in several places: from the **Constituent, AddressAccelerator** menu on the constituent record; through the **Address, AddressAccelerator** menu on the Address screen of a constituent record; or by clicking the **AddressAccelerator** button on the toolbar of the Address screen. You can correct and validate the primary address or any other address type on the constituent record.

You can access *AddressAccelerator* from constituent, participant, relationship, and address records.

➢ **Correcting an address from a constituent record**

When you were out with your friend Lisa Davis, she expressed interest in the public television station you work for. You created a constituent record for her in your database and filled in the address information you knew. You did not know her postal code and guessed on the spelling of her street name. Now, you are preparing to send out a mailing and want to include her; so you want to make sure her address information is complete and correct. Run **AddressAccelerator** from Lisa's constituent record.

1. On the Raiser's Edge bar, click **Records**.

2. Click the **Constituents** link. The Constituents page appears.
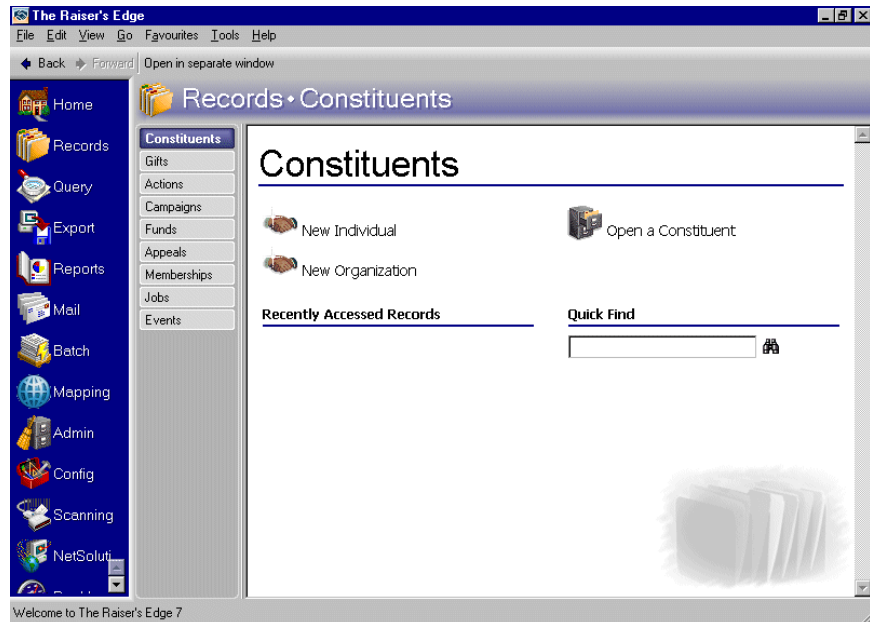
3. Click **Open a Constituent**. The Open screen for constituents appears.

4. When you find and select Lisa Davis, click **Open**. For more information about opening a constituent record, see the *Constituent Data Entry Guide*.

5. Select the Bio 1 tab.

To correct and validate the primary address on the Bio 1 tab, you can select **Constituent**, **AddressAccelerator** from the menu bar of the constituent record. To validate any other address, open the address record from the Addresses tab and select **Constituent**, **AddressAccelerator** from the menu bar of the address record.

6. In the **Preferred Address** frame on the right, click **More**. The Address screen for Lisa Davis appears.

7. On the toolbar, click the **AddressAccelerator** button. You can also select **Address, AddressAccelerator** from the menu bar of the constituent record.

Addresses other than Canada-formatted are included in processing, but fail the first test and are not considered for further processing against the exception rules. For example, you cannot update from the *AddressAccelerator* data files a constituent's address if it is a United States address.

If the address cannot be certified, the Postal Code Browser screen appears.

The address entered on the constituent record defaults into the address fields in the **Find Criteria** frame at the top right of the screen. The frame at the bottom of the Postal Code Browser screen lists all possible street names falling within the parameters you define in the **Find Criteria** frame.

For this example, no possible addresses list under the parameters currently defined.

It is sometimes necessary and easier to limit the parameters you search under to find the correct address. Start with the information you are sure of and delete the rest to broaden your search. You can always retrieve the original address entered on the constituent record by clicking **Revert** on the right.

8. For this example, you are already missing the **Postal Code**. You know for certain the constituent lives in Toronto, which is in the **Province** of Ontario (ON). You know her street number is "33" and the street is an "avenue"; but it is possible you spelled the street name wrong. So, highlight "Burwick" in **Address Line 1** field and press **DELETE** on your keyboard.

You can clear all information in these fields by clicking the **Clear** button on the right.
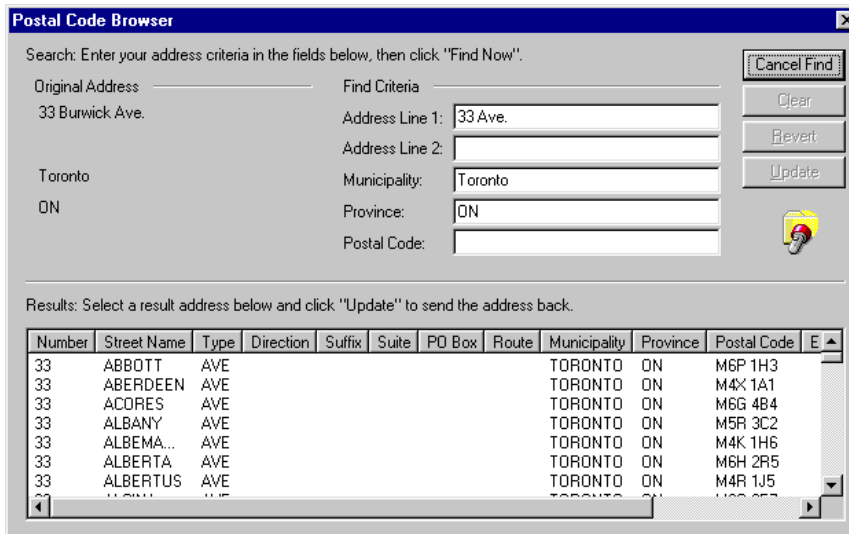
9. You are left with less-constricting parameters to perform a search. Click **Find Now**. The program begins to search for all possible addresses falling within the parameters you have set. All possible addresses appear in the frame at the bottom of the screen.

All "Avenues" containing the street number "33" in Toronto, Ontario appear, along with the corresponding postal codes, in the frame at the bottom of the screen.

10. When the search is complete, scroll through the list to search for "Burwick".

No such street exists. However, scroll up again to find "Berwick Avenue." You realize you simply spelled the street name wrong and this is the correct address you are searching for.

11. Double-click the "Berwick" row. The correct information appears in the address fields in the **Find Criteria** frame.

You now have the correct address information. Click **Update**. The Address Finder screen appears.

The original address entered on the constituent record, before you searched for the correct one, appears as view-only in the **Current Address Information** frame at the top of the AddressAccelerator screen.

The updated address information you selected on the Postal Code Browser screen appears in the editable address fields at the bottom of the screen. You can change information in these fields, such as capitalization, if you want. Because this information is taken directly from the Postal Code Browser screen, it is already validated. Therefore, the **Validate** button is disabled.

12. To update the address on the constituent record, click **Update Address**. You return to the Address screen with the updated and certified address information filled in the appropriate fields.

Address information will not validate if it does not meet Canada Post standards. You can still update an address on a constituent record if it is not validated. However, to qualify for the greatest discounts on your mailings, we recommend you use validated addresses.

13. To see how the address will appear on mailings in the **Address block** at the bottom of the screen, click **Save** on the toolbar.

If the address is linked to another address, a message appears telling you so.

14. To update the address, make your selection and click **OK** on the message. You return to the Address screen with the **Address block** updated.

15. To save the changes and close the address record, click **Save and Close** on the toolbar. You return to the Bio 1 tab of the constituent record.

16. To save the changes and close the constituent record, click **Save and Close** on the toolbar.

Using AddressAccelerator with Batch

In *The Raiser's Edge*, *Batch* provides an avenue for fast and easy data entry. You can enter multiple new constituents or gifts into your database at one time. With *AddressAccelerator*, you can look up or correct addresses as you enter them in *Batch*, for even more efficient data entry.

Accessing *AddressAccelerator* in *Batch* should not be confused with updating addresses in the database using batch mode. For more information about updating addresses using batch mode, see "Updating addresses in the database using Batch mode" on page 30.

➢ **Looking up and correcting a constituent address in Batch**

You received a phone call from Miss Amanda Le Bon, requesting information about your organization. You want to enter her in your database as part of a batch you are creating for all new constituents. During your phone conversation, you forgot to ask Miss Le Bon for her postal code. You need to look up her address and correct it.

1. Create a new constituent batch containing the fields, "Last name", "First name", "Address", "City","Province", and "Postal Code". For more information about *Batch*, see the "Adding Constituents in the Data Entry Grid" section of the Constituent Batch chapter of the *Batch Guide*.

2. In the **Last Name** column, enter "Le Bon".

3. In the **First Name** column, enter "Amanda".

4. In the **Address** column, enter "11762 Depat Rue".

5. In the **City** column, enter "Montreal".

6. In the **Province** column, enter "QC".

If you want to add footnotes as address attributes, you must select **Address validation footnotes attribute description**, **Address validation footnotes attribute date**, and **Address validation footnotes attribute comment** fields when setting up your Batch (select under **Constituent Information**, **Address**, **Attributes**). If you do not, the **Add footnote as an address attribute** checkbox on the AddressFinder screen will not become enabled and the footnote will not be recorded as an address attribute.

7. From the menu bar, select **Constituent**, **AddressAccelerator**.
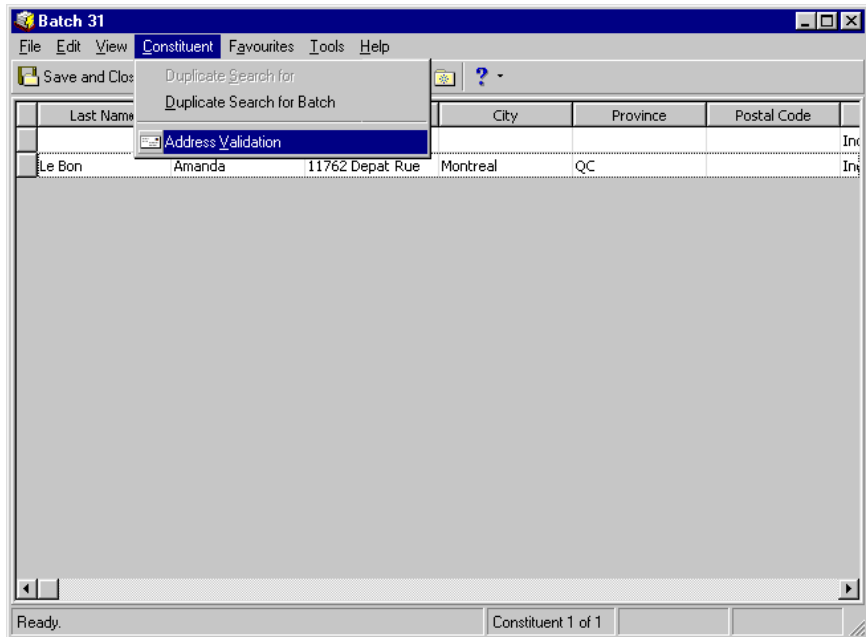
The Postal Code Browser screen appears.

If enough valid address information exists for the program to automatically update and validate the address, the AddressFinder screen appears, instead of the Postal Code Browser screen. For example, if you are missing the Postal Code, but all other address information is correct, the AddressFinder screen appears with the updated postal code. You do not need to search for the entire correct address on the Postal Code Browser screen.

8. Highlight the row with Depatie Rue and double-click it. You realize Rue Depat is wrong. There was an error in the data you have and this is the correct street name. The updated address information appears in the fields at the top right.

9. To update the address in the batch, click **Update**. The Address Finder screen appears. The address information is now correct and certified.

10. To update the postal code in the batch, click **Update Address**. You return to the new batch screen and the postal code is filled in the correct **Postal Code** column.

11. To save the information and close the batch, click **Save and Close**.

If you want to add footnotes as address attributes, you must select **Address validation footnotes attribute description**, **Address validation footnotes attribute date**, and **Address validation footnotes attribute comment** fields when setting up your Batch (select under **Constituent Information**, **Address**, **Attributes**). If you do not, the **Add footnote as an address attribute** checkbox on the AddressFinder screen will not become enabled and the footnote will not be recorded as an address attribute.

For more information about committing and validating batches, see the *Batch Guide*.

Establishing a Business Rule to Automatically Update Addresses

On the Business Rules page of *Configuration*, under **General**, the **Automatically attempt to validate the address** checkbox appears if you have *AddressAccelerator*. Mark the **Automatically attempt to validate the address** checkbox if you want to see if an address meets *AddressAccelerator* standards whenever you edit an address.

If you check this checkbox, each time you leave a **Postal Code** field or save a record where you have added or changed an address, *AddressAccelerator* automatically runs. The correct and certified address fields automatically fill in.

If you do not want to set the business rule to auto-validate each time you edit an address, you can still press **F8** on your keyboard or click the **AddressAccelerator** button on the toolbar of a constituent, relationship, participant, or address record to run *AddressAccelerator*.
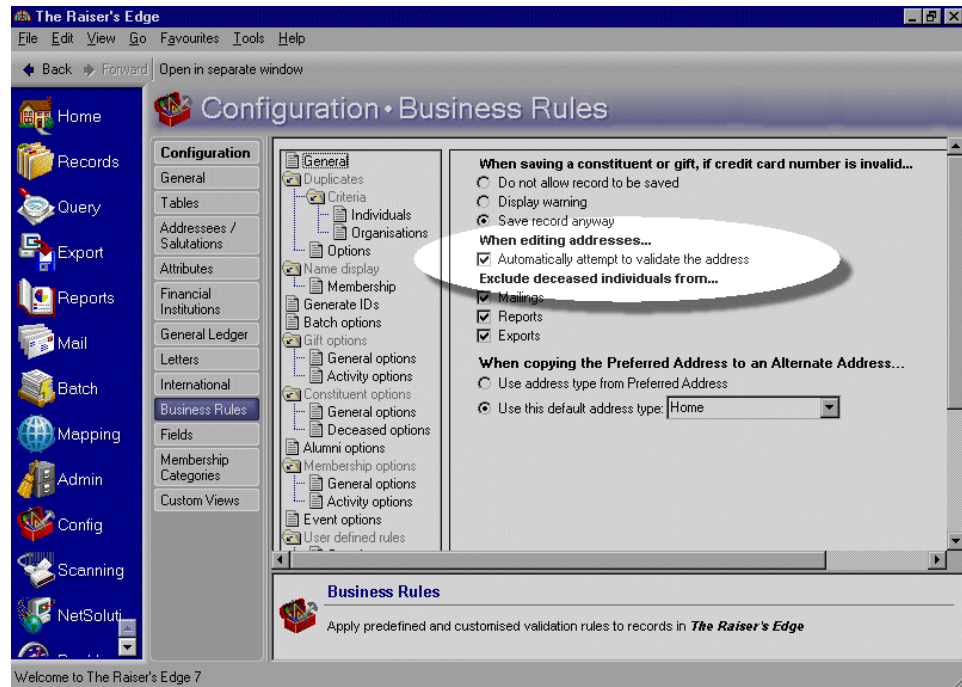
Only addresses in countries for which you have marked the **Addresses with this country are available for address validation** checkbox are included. For more information, see "Setting a Country's Availability for AddressAccelerator" on page 12.

Blackbaud Analytics

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Blackbaud Analytics services helps you put your constituent data to work. Using your *Raiser's Edge* data, the service identifies your best charitable giving prospects, helping you maximize your gift revenue. The services analyze historic and current data, as well as behavioral trends. You learn which individuals are your best annual, major, and planned giving prospects now and in the future.

Blackbaud Analytics services understands each client is unique. It builds a custom model of your donors by combining your data with outside sources of demographic and wealth information. With these additional sources of information, Blackbaud Analytics services can build models that best distinguish donors from non-donors and major giving prospects from planned-giving prospects or annual giving prospects.

In addition to providing you with analytical services, Blackbaud also provides you with a utility to move information back and forth between Blackbaud Analytics services and your *Raiser's Edge* database. The **Blackbaud Analytics** link takes you step-by-step through the process of creating an export file with all the necessary information, sending the file to Blackbaud Analytics services, downloading the updated file from the Custom Modeling Services back into your system, and finally updating constituent records.

The updated constituent records house the research results in the form of scores and demographic data. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and charitable request/trust likelihood. Scores also include an asset estimator, estimating the constituent's wealth range. The demographics information Blackbaud Analytics services can provide includes household income estimates, giving history, and information based on age and gender groups.

Once you update your records with the score and demographic data provided by Blackbaud Analytics services statisticians, you can view the new information on the constituent records.

Frequently Used Terms

This section defines words and phrases you need to know as you work with Blackbaud Analytics services and **Blackbaud Analytics**. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Exceptions. An exception is a record the program failed to process. For example, when you create the export file to send to Blackbaud Analytics services, any *Raiser's Edge* constituent record the program failed to include in the export is an exception.

Demographics. Demographic information offers a statistical overview of general characteristics of a group (age, income, region). The demographic information Blackbaud Analytics services provides includes household income estimates, giving history, and information based on age and gender groups.

FTP. FTP stands for File Transfer Protocol. A standard Internet protocol, FTP is the simplest way to exchange files between computers on the Internet. FTP commonly transfers Web page files from their creator to a computer acting as the files server for everyone on the Internet.

Prospect. The prospect is the source from whom your organization is cultivating a gift. For example, if you discover Dr. Robert C. Hernadez has inherited $1,000,000 and your organization decides to pursue him for a donation, Dr. Hernadez is a prospect.

Scores. Scores are detailed analyses of gift and constituent prospects. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and charitable request/trust likelihood. Scores also include an asset estimator, estimating the constituent's wealth and income range.

Accessing Blackbaud Analytics

Blackbaud Analytics is accessed by clicking **Admin** on the Raiser's Edge bar.

➢ **Opening Blackbaud Analytics**

1. On the Raiser's Edge bar, click **Admin**.

2. Click **Data Enrichment Services**.

3. Click **Blackbaud Analytics**. The Blackbaud Analytics page appears.
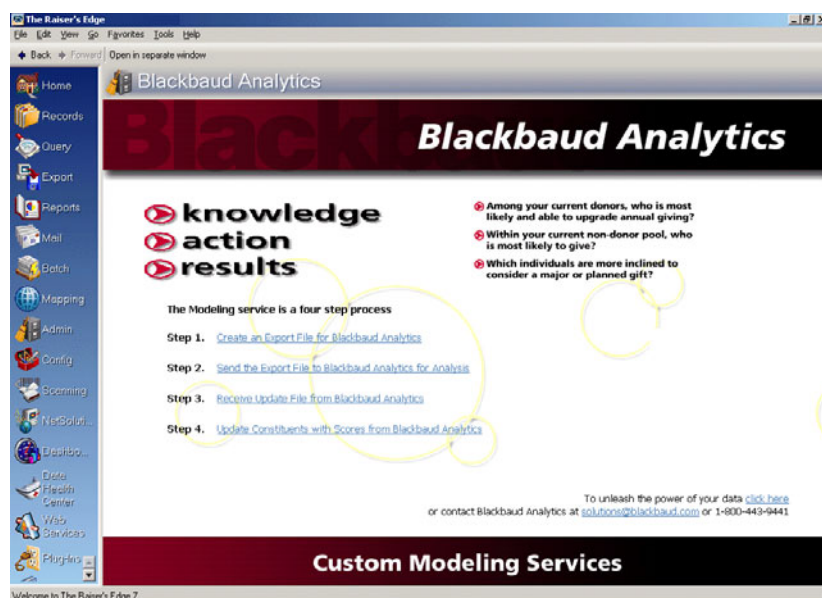
4. From the Blackbaud Analytics page, you can create an export file, send the file to Blackbaud Analytics services, download the updated file from Blackbaud Analytics services, and update your constituent records with the new information.
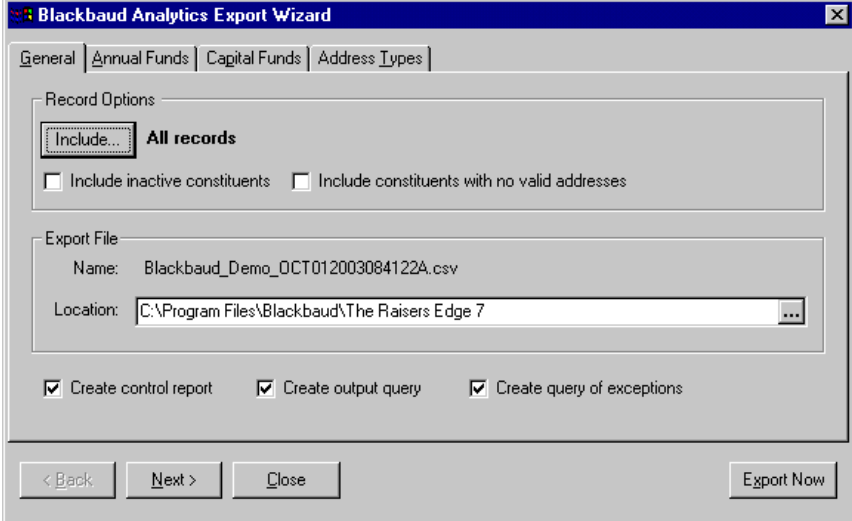
Creating an Export File for Blackbaud Analytics Custom Modeling Services

The Blackbaud Analytics Export Wizard, accessed through the Blackbaud Analytics page, simplifies the process of extracting important analytical data from your *Raiser's Edge* database. Arranged around four tabs — General, Annual Funds, Capital Funds, and Address Types — the wizard tells you exactly what information is needed to provide you with the best results.

➢ **Creating an export file**

1. From the Blackbaud Analytics screen, click **Create an Export File for Blackbaud Analytics**. The Blackbaud Analytics Export Wizard screen appears, displaying the General tab.

2. To select the records you want to include in your export file, click the **Include** button. From the menu that appears, you can choose to include **All Records** or **Selected Records** from your database that satisfy the export criteria.

If you choose **All Records** all records in your *Raiser's Edge* database that satisfy your export criteria are included. If you choose **Selected Records**, the Open Query screen appears, so you can choose a query of records to include in your export file.


- In the **Find Queries that meet these criteria** frame, you can enter criteria information to limit the queries appearing in the grid

- Click **Find Now**. All constituent queries satisfying the criteria you entered appear.

- Select a query and click **Open**, or to create a new query, click **Add New**

After you select the records you want to include, you return to the Blackbaud Analytics Export Wizard screen. The query name appears next to the **Include** button.

3. To include records of inactive constituents in your export file, mark the **Include inactive constituents** checkbox.

4. To include constituent records in your export file even if the record has no valid address, mark the **Include constituents with no valid address** checkbox.

5. In the **Export File** frame, a **Name** for the export file you are creating defaults. You should not change this name. The default name is consistent with the Blackbaud Analytics services format and allows statisticians to easily locate and identify your export file.

For information about creating a query, see the Query chapter of the *Query & Export Guide*.

6. In the **Location** field, enter where in your system you want the export file saved. Click the ellipsis to access the Browse for Folder screen and map to a location.
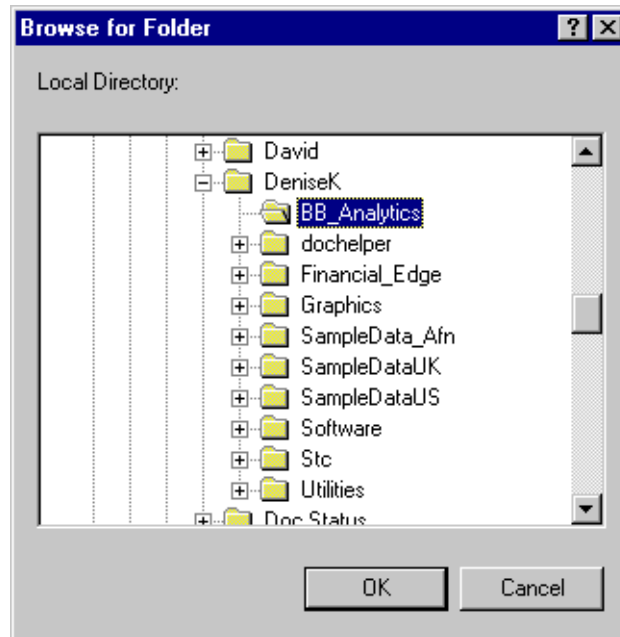
From the Browse for Folder screen, click **OK** to return to the Blackbaud Analytics Export Wizard screen.

7. To create a report detailing the criteria used to generate the export file and explaining any exceptions encountered during processing, mark the **Create control report** checkbox.

8. To create a query of all records included in the export, mark the **Create output query** checkbox.

9. To create a query of exceptions, mark the **Create query of exceptions** checkbox. We recommend marking this checkbox. The query may prove useful in identifying and correcting records the program could not include in the export file.

10. To move to the Annual Funds tab, click **Next**.
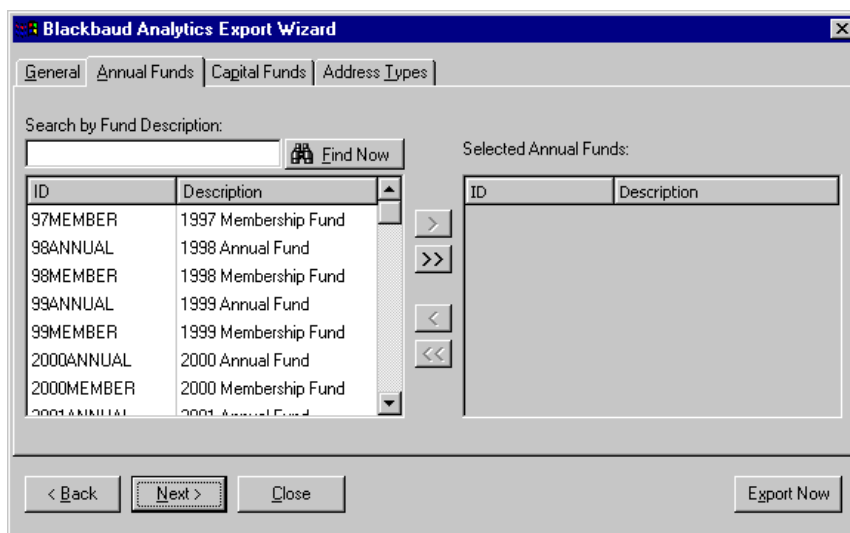
On this tab you select the annual funds you want to include in the analysis. Gifts given to the selected funds are exported.
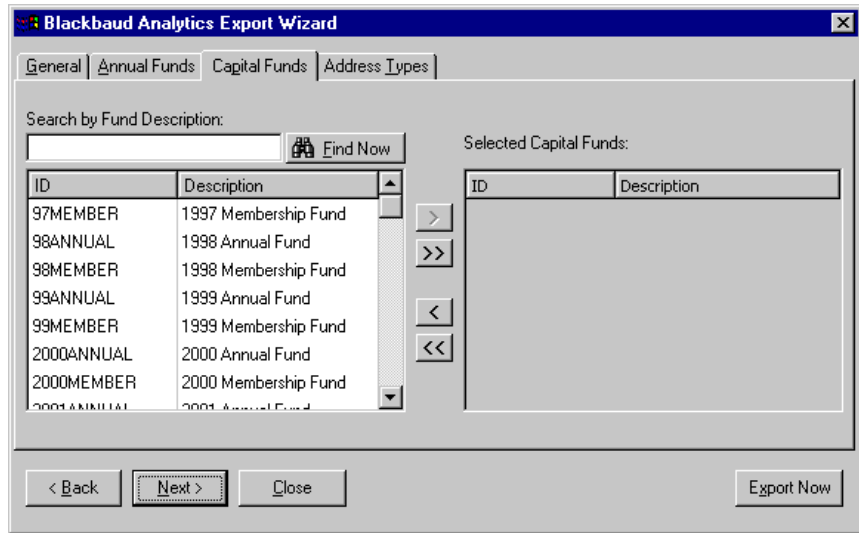
11. To select a fund, highlight the fund in the box on the left side of your screen and click the single right arrow. The fund appears in the **Selected Annual Funds** box on the right side of your screen.
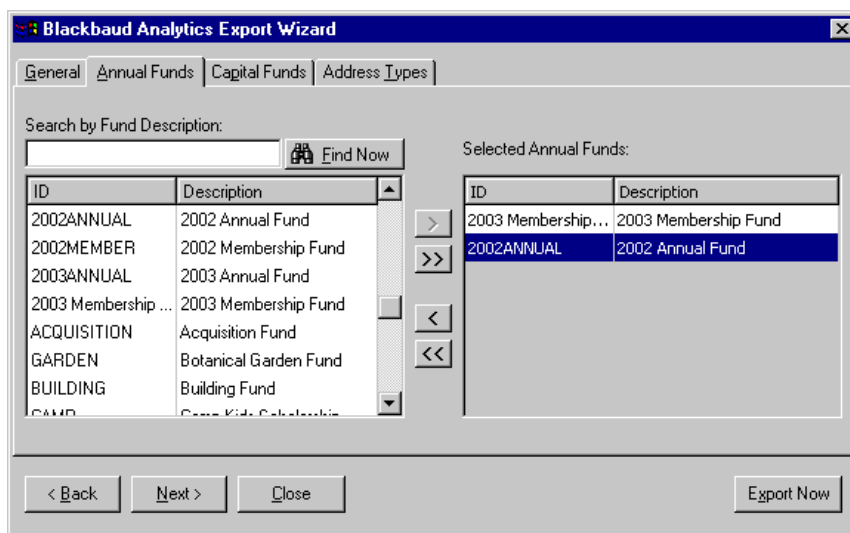
If you do not want to scroll down the list of funds, you can enter search information in the **Search by Fund Description** field and click **Find Now**. For example, if you want only funds for the year 2003, enter "2003" in the **Search by Fund Description** field and click **Find Now**. The funds list then displays only funds with "2003" in the title.
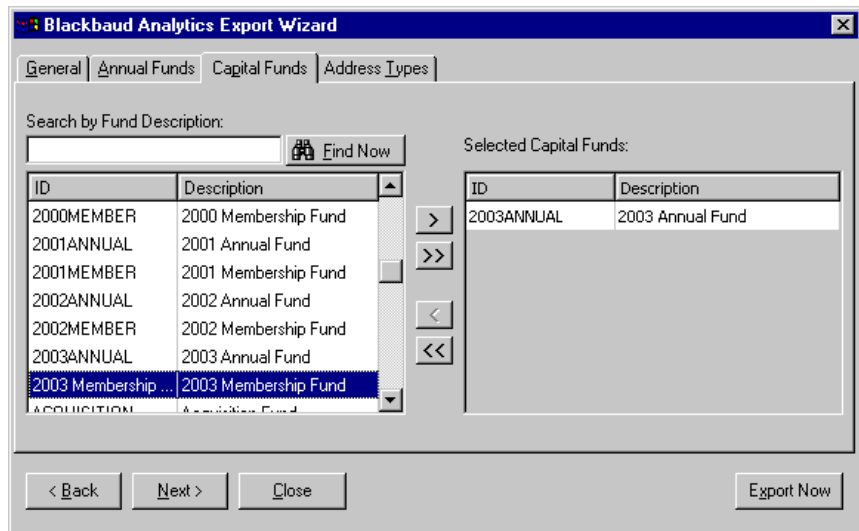
To include all annual funds in your export file, click the double right arrows. To remove a fund from the **Selected Annual Funds** box, highlight the fund and click the single left arrow. To remove all funds from the **Selected Annual Funds** box, click the double left arrows.

12. To move to the Capital Funds tab, click **Next**.

On this tab you select the capital funds you want to include in the analysis. Gifts given to the selected funds are exported.

13. To select a fund, highlight the fund in the box on the left side of your screen and click the single right arrow. The fund appears in the **Selected Capital Funds** box on the right side of your screen.

If you do not want to scroll down the list of funds, you can enter search information in the **Search by Fund Description** field and click **Find Now**. For example, if you want only funds for the year 2003, enter "2003" in the **Search by Fund Description** field and click **Find Now**. The funds list then displays only funds with "2003" in the title.

To select all capital funds, click the double right arrows. To remove a fund from the **Selected Capital Funds** box, highlight the fund and click the single left arrow. To remove all funds from the **Selected Capital Funds** box, click the double left arrows.

Although Capital Fund information is not required to create a custom model of your prospective donors, we recommend you include this information in your export file. The more information you provide Blackbaud Analytics services, the better the prospect information you receive.

14. To move to the Address Types tab, click **Next**.
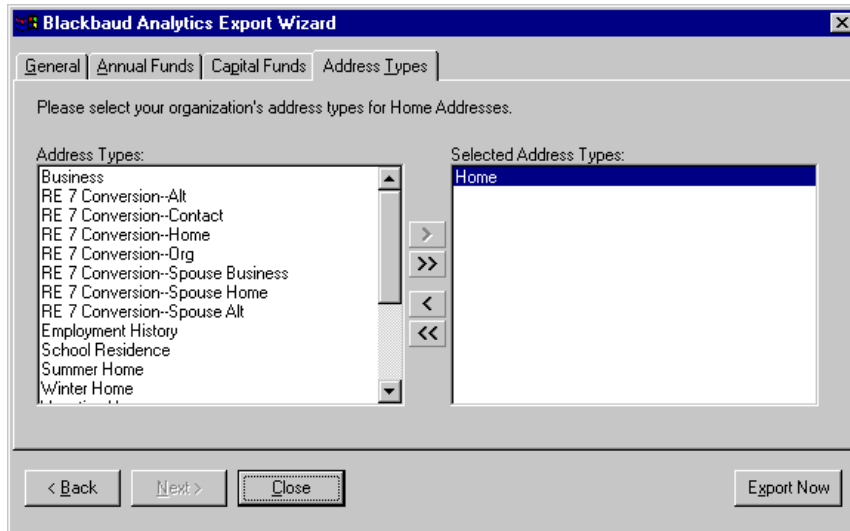
On this tab you select the address types acceptable for analysis. The program exports only one valid address, but to improve the chances of the program locating a valid address, you can include as many address types as you like in the **Selected Address Types** box.

The program stops searching for a constituent address after it finds one valid address to export. For example, you can include "Summer Home", "Winter Home", and "Former Address" in the **Selected Address Types** box. During the export process, the program first searches for a "Summer Home" address. If a valid "Summer Home" address is found, the program includes that address in the export file and stops searching. If no "Summer Home" address exists on the constituent record, the program continues searching for a "Winter Home" address.

15. To select an address type, highlight the address type in the **Address Types** box on the left side of your screen and click the single right arrow. The address type appears in the **Selected Address Types** box on the right side of your screen.

Only U.S. address information can be exported. The program does not accept international or Canadian addresses.
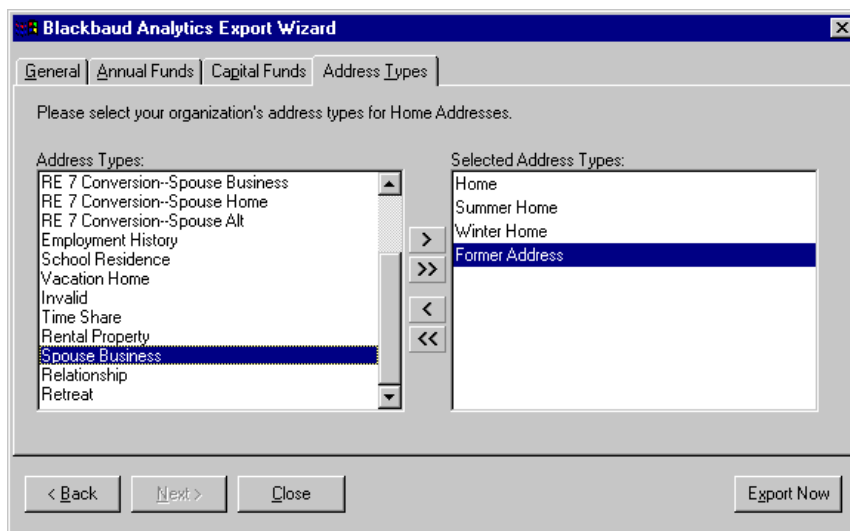
To select all **Address Types**, click the double right arrows. To remove an address type from the **Selected Address Types** box, highlight the address type and click the single left arrow. To remove all address types from the **Selected Address Types** box, click the double left arrows.

16. After you complete all Blackbaud Analytics Export Wizard tabs, click **Export Now** to create an export file in the location you entered on the **Location** field on the General tab.

17. If on the General tab you marked the **Create query of exceptions** checkbox, the Save static query screen appears.

    Enter a **Query name** and a **Description** that will help you identify the records included in the query. The **Query format** field defaults to "Static" and cannot be changed. You can also allow others to execute or modify the query file.

18. Click **Save**. The program processes the export file.

If you did not mark the **Create control report** checkbox on the General tab of the Blackbaud Analytics Export Wizard screen, the **Preview Report** button does not appear on the Data Export Complete screen.

19. When the processing is complete, the Data Export Complete screen appears. This screen displays the number of records processed and exported. It also displays the number of exceptions, if any.

20. To open the Control Report and view reasons for any exceptions, along with export results and criteria, click **Preview Report**.

21. To close the report and return to the Blackbaud Analytics Export Wizard screen, click the "X" in the upper right corner.

22. To exit the Blackbaud Analytics Export Wizard, click **Close**.

You are now ready to send the export file to Blackbaud Analytics services.

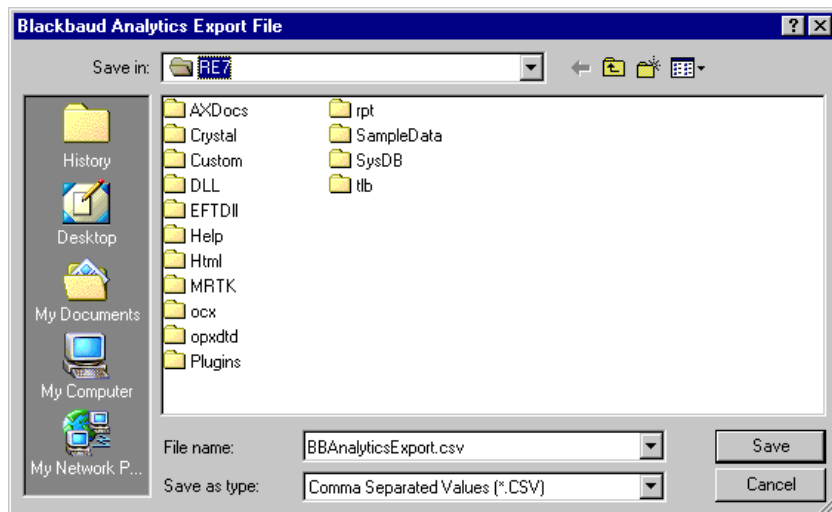# Sending an Export File to Blackbaud Analytics Custom Modeling Services

After you create an export file using the Blackbaud Analytics Export Wizard, you send the file to the Blackbaud FPT server. From there, statisticians download your data for analysis. To send the export file to the FTP server, use the **Send the Export File to Blackbaud Analytics for Analysis** link provided on the Blackbaud Analytics screen in *The Raiser's Edge*. The program automatically creates a Zip file of your data, places it in the proper folder on the Blackbaud FTP server, and sends an email to Blackbaud Analytics services, telling the statisticians your file is available.

If you created an output query of exceptions when you generated your export file, you can use the query to fix records listed as exceptions in the Control Report.

➢ **Sending an export file**

1. From the Blackbaud Analytics screen, click **Send the Export File to Blackbaud Analytics for Analysis**. The Blackbaud Analytics Send File Wizard screen appears.
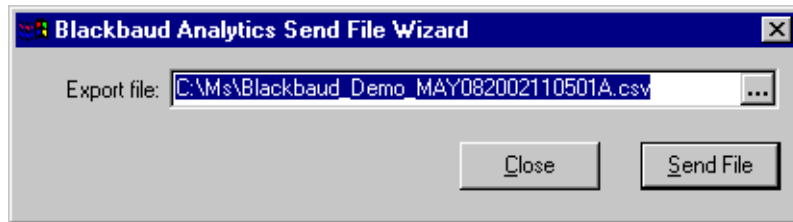
2. In the **Export file** field, the most recent export file you created appears. For more information about creating export files, see "Creating an Export File for Blackbaud Analytics Custom Modeling Services" on page 66.

3. To search for a different file, click the ellipsis to access the Blackbaud Analytics Export File screen.

4. On this screen, you can map to a different export file and click **Save** to return to the Blackbaud Analytics Send File Wizard screen. In the **Export file** field, the export file you selected appears.

5. After you complete the Blackbaud Analytics Send File Wizard screen, click **Send File**. The export file is copied to the proper folder on the Blackbaud FTP server. A confirmation message appears, telling you when the procedure is complete.
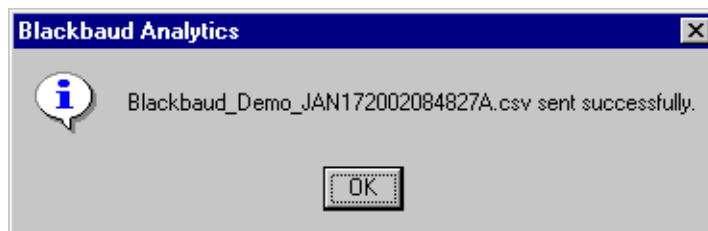
6. To return to the Blackbaud Analytics Send File Wizard screen, click **OK**.

7. To return to the Blackbaud Analytics page, click **Close**.

    Blackbaud will contact you via email and tell you when your analyzed file is ready. You can then use the **Receive Update File from Blackbaud Analytics** link on the Blackbaud Analytics screen to download the new information.

Receiving Update Files from Blackbaud Analytics Custom Modeling Services

After Blackbaud Analytics services creates your models and presents your results, the service sends you an email message, announcing your scores and demographic information are ready to import into *The Raiser's Edge*. You can use the **Receive Update File from Blackbaud Analytics** link on the Blackbaud Analytics screen to download the new file into your system. This does not update your *Raiser's Edge* records; it just places the file back in your system, from where you can later update your records.

➢ **Downloading updated files from the Blackbaud FTP server**

1. From the Blackbaud Analytics screen, click **Receive Update File from Blackbaud Analytics**. The Blackbaud Analytics Get File Wizard screen appears.
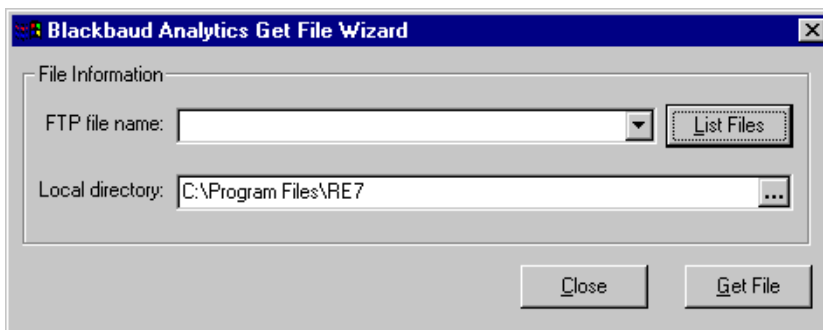
2. In the **File Information** frame, click the **List Files** button. Any Blackbaud Analytics files available in your pick up folder on the FTP server appear in the **FTP file name** field.
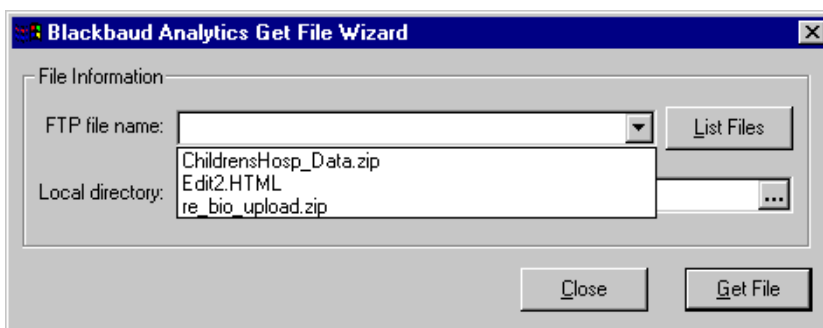
3. In the **FTP file name** field, select the file you want to import back into *The Raiser's Edge*.

4. In the **Local directory** field, enter a path to the location in your system where you want the FTP file downloaded.

   You can click the ellipsis to access the Browse for Folder screen and map to the directory and folder.
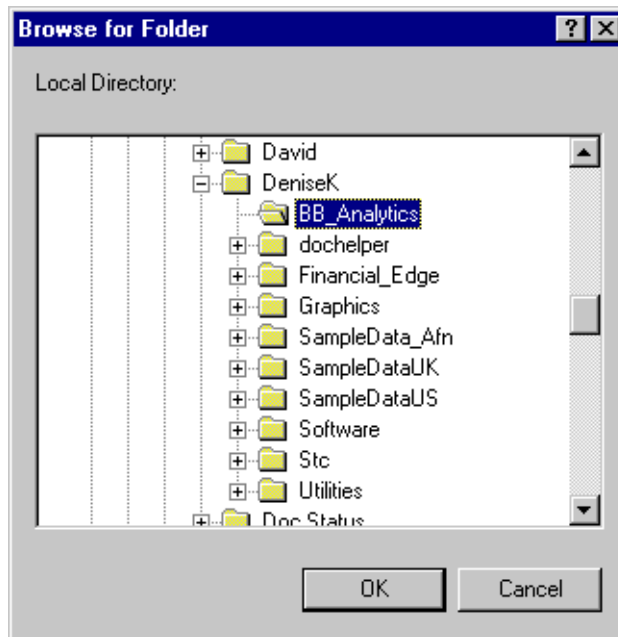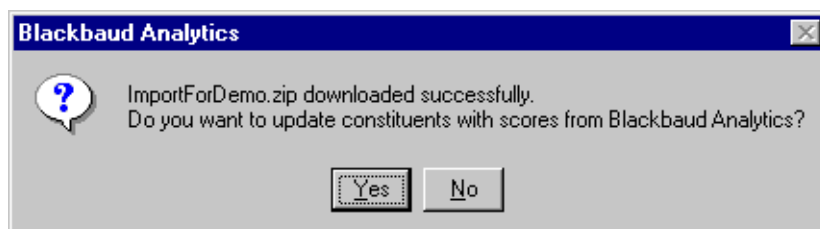

To return to the Blackbaud Analytics Send File Wizard screen, click **OK**.
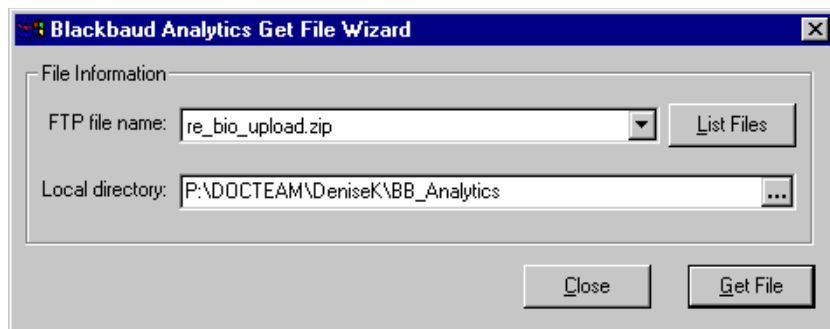
The path you selected appears in the **Local directory** field.

5. After you complete the Blackbaud Analytics Get File Wizard screen, click **Get File**. The program downloads the file to the selected directory. A confirmation screen appears when the process is finished.

6. If you want to update your constituent records now with the new information, click **Yes**. The Blackbaud Analytics Update Records Wizard screen appears. For detailed instructions about updating records, see "Updating Constituents with Scores from Blackbaud Analytics" on page 77.

7. If you want to wait, and maybe view the update file in *Microsoft Excel* or another spreadsheet program, click **No**. You return to the Blackbaud Analytics Send File Wizard screen.

8. To return to the Blackbaud Analytics page, click **Close**.

Updating Constituents with Scores from Blackbaud Analytics

After you download the Blackbaud Analytics services file, you can use the **Update Constituents with Scores from Blackbaud Analytics** link on the Blackbaud Analytics screen to update your *Raiser's Edge* constituent records. This process adds the research information provided by Blackbaud Analytics services to your constituent records.

➢ **Updating constituent records with Blackbaud Analytics data**

1. From the Blackbaud Analytics screen, click **Update Constituents with Scores from Blackbaud Analytics**. The Blackbaud Analytics Update Records Wizard screen appears.

We strongly recommend you have a recent tape backup of your *Raiser's Edge* database before you run the updating process. This process permanently changes your constituent records. Restoring you database from a backup is the only way to reverse the process should an error occur.

2. In the **FTP file** field, the document you most recently downloaded from the Blackbaud FTP server defaults. To search for a different document, click the ellipsis to access the Import Blackbaud Analytics Data from screen.
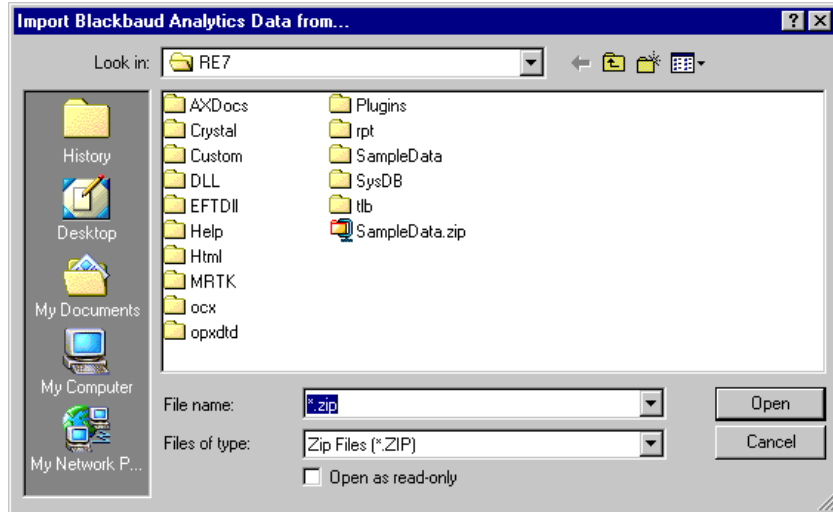

Locate the downloaded Zip file and click **Open** to return to the Blackbaud Analytics Update Records Wizard screen.

In the **Update file** field, the name of the update file you selected appears.

3. All files downloaded from Blackbaud's FTP server are password-protected. In the **Password** field, enter the password information that was included in the email message notifying you that your custom modeling file was ready to download.

4. In the **Create files in** field, enter where in your system you want the program to save the file of exceptions. Exceptions are records that for some reason, *The Raiser's Edge* was unable to update.

You can click the ellipsis to access the Browse for Folder screen and map to the directory and folder in which you want exceptions saved.
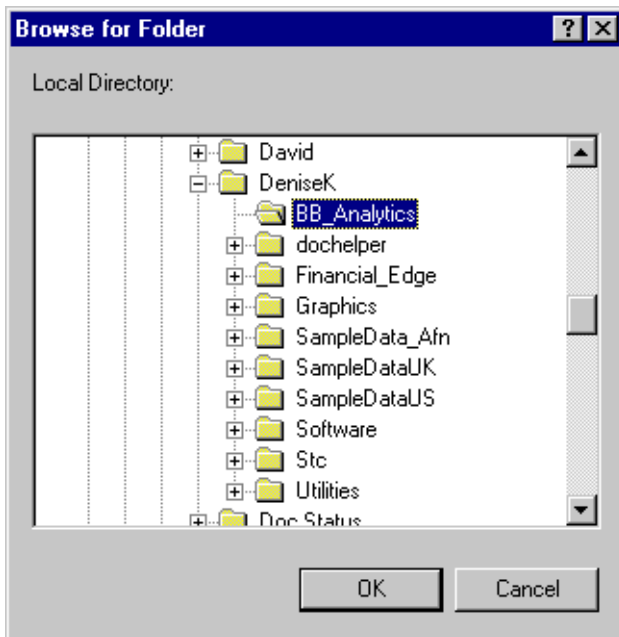
To return to the Blackbaud Analytics Update Records Wizard screen, click **OK**.
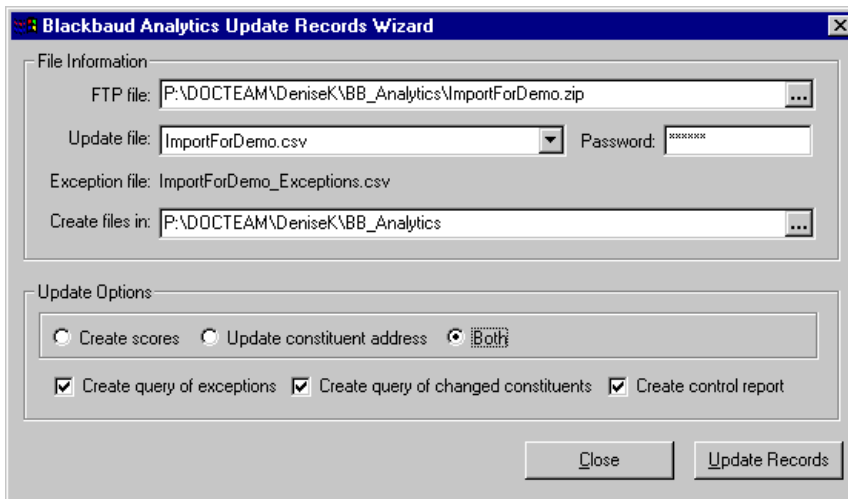
5. In the **Update Options** frame, choose from the following options or checkboxes:

To better track changes made to your *Raiser's Edge* constituent records, do not select to update both address and score information at the same time. Running the procedures separately gives you separate query files: one detailing all address information updated and the other detailing all score information added.

Because updated address information overwrites the existing information entered on the Addresses tab of the constituent record, we recommend creating a query of changed constituents. You can use the query to track constituent records affected by the update.

- **Create scores** adds scores or rating information to all constituent records included in the custom modeling file. This information appears on the Prospect tab of the constituent records, in the **Ratings** category.

- **Update constituent address** updates all constituent address information included in the custom modeling file. For example, if the "Home" address is updated in the custom modeling file, the "Home" address on the constituent record is updated; if the "Winter Home" address is updated in the custom modeling file, the "Winter Home" address on the constituent record is updated.

- **Both** creates scores and updates constituent address information at the same time.

- **Create query of exceptions** creates a static query of all records the program could not update. The Blackbaud Analytics Custom Modeling statisticians can use this information and research why these records could not update.

- **Create query of changed constituents** creates a static query of all records the program updated.

- **Create control report** generates a report displaying the number of records processed and updated, the number of exceptions, reasons for the exceptions, and the number of addresses updated.

6. After you complete the the Blackbaud Analytics Update Records Wizard screen, click **Update Records**.

7. If you marked **Create query of exceptions** or **Create query of changed constituents** the Save Static Query screen appears (once for each checkbox marked).

   Enter a **Query name** and a **Description** that will help you identify the records included in the query. The **Query format** field defaults to "Static" and cannot be changed. You can also allow others to execute or modify the query file.

8. Click **Save**. The program processes the update request and a tracking screen appears.
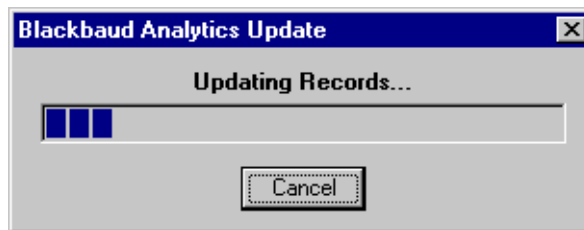

   When the update is complete, a screen appears, displaying information about the update.

If you did not mark the **Create control report** checkbox on the Blackbaud Analytics Update Records Wizard screen, the **Preview Report** button does not appear on the Data Update Complete screen.

9. The screen displays the number of Records Read, Records Imported, and Exceptions. It also shows the Total Time the process took and the number of records updated per second (Records/sec).

10. If you marked the **Create control report** checkbox on the Blackbaud Analytics Update Records Wizard screen, click **Preview Report** to open the report.
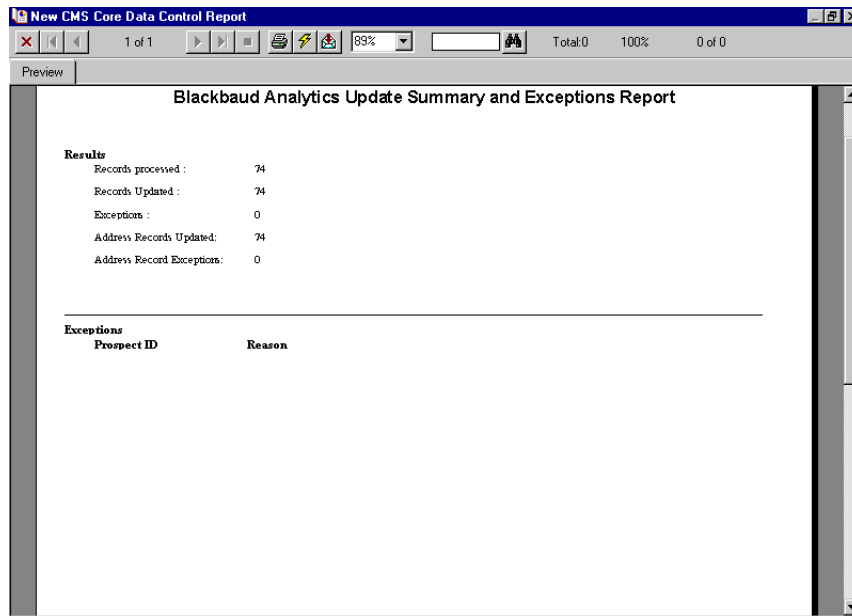
11. The report displays result information and details about any exceptions. Your can print a hardcopy of the report by clicking the print icon at the top of the screen. To close the report and return to the Blackbaud Analytics Update Records Wizard screen, click the "X" in the upper right corner.

12. From the Blackbaud Analytics Update Records Wizard screen, click **Close**. You return to the Blackbaud Analytics page.

Viewing Blackbaud Analytics Data in The Raiser's Edge

Blackbaud Analytics updates *Raiser's Edge* constituent records, adding research results provided by Blackbaud Analytics services. **Blackbaud Analytics** enters this information in the form of scores and demographic data. Scores rate a constituent based on his annual gift likelihood, target gift dollar range, major gift likelihood, planned gift likelihood, annuity likelihood, bequest likelihood, and CRT likelihood. Scores also include an asset estimator, estimating the constituent's wealth and income range. The demographic information Blackbaud Analytics services provide includes summarized giving history, age, and gender. The results you receive depend on your contract with Blackbaud Analytics services and the information you provided the service.

Once you update your records with the score and demographic data provided by Blackbaud Analytics services statisticians, you can view the new information on the constituent records. All score information appears on the Prospect tab in the **Ratings** category.

➢ **Viewing scores in The Raiser's Edge**

1. From the constituent record for which you want to view score information, select the Prospect tab.
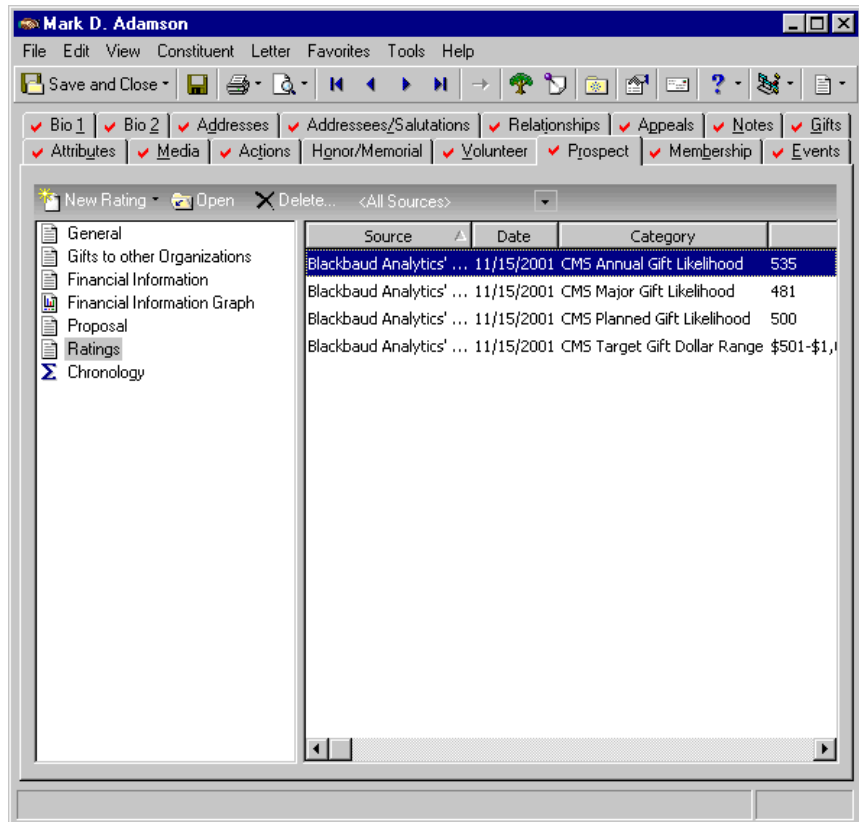
2. On the left side of the screen, select the **Ratings** category. All score
   information provided by Blackbaud Analytics services appears on the
   right side of the screen.

Score information is arranged by columns:

- In the **Source** column, available on the Prospect tab, the source
  (Blackbaud Analytics Custom Modeling Services [Blackbaud
  Analytics services]) that provided the ratings information appears

- In the **Date** column, the date Blackbaud Analytics services entered the
  ratings data appears

- In the **Category** column, the category scored appears. Blackbaud
  Analytics services scores constituents for the following categories:

  Annual Gift Likelihood with scores ranging from 1-1000 (1 = least
  likelihood to give and 1000 = most likelihood to give)

  Target Gift Dollar Range measures the capability of the prospect to
  make a gift in a particular dollar range

  Major Gift Likelihood with scores ranging from 1-1000 (1 = least
  likelihood to give and 1000 = most likelihood to give)

  Planned Gift Likelihood with scores ranging from 1-1000 (1 = least
  likelihood to give and 1000 = most likelihood to give)

  Asset Estimator estimates the prospect's wealth range

  Estimated Income estimates the prospect's income range

The results you receive depend on your contract with Blackbaud Analytics services and the information you provided.

- The **Description** column displays Blackbaud Analytics services ratings for each **Category** and **Date**

- The **Notes** column on the Prospect tab (not shown in screen shot) and the **Comments** column on the Attributes tab, house any additional information the statistician may want to add about the score

➢ **Viewing demographic information in The Raiser's Edge**

1. From the constituent record for which you want to view demographics information, select the Attributes tab.

2. All information downloaded from the Blackbaud Analytics services file begins with "Blackbaud Analytics services".

   The **Category** information available for demographic data includes the following:

   - Past Giver Type displays the prospect's giving history, where 0 = non-giver, 1 = occasional giver, and 2 = consistent giver

   - Age combines all possible sources of age, including client information and outside sources of age

   - Gender combines all possible sources of gender information, including client information and Blackbaud Analytics services predicted gender.

3. In the **Date** column, the date Blackbaud Analytics services entered the data appears.

4. Blackbaud Analytics services enters any notes or comments related to the data in the **Comments** column.

➢ **Viewing address information updated in The Raiser's Edge**

Address update information is posted directly to the Addresses tab of the constituent records. To view a list of address information changed during the update process, open the query of changed constituents created when you updated the records, using the **Update Constituents with scores from Blackbaud Analytics** link. You can then open the affected constituent records and view the new address information.

1. On the Raiser's Edge bar, click **Query**.
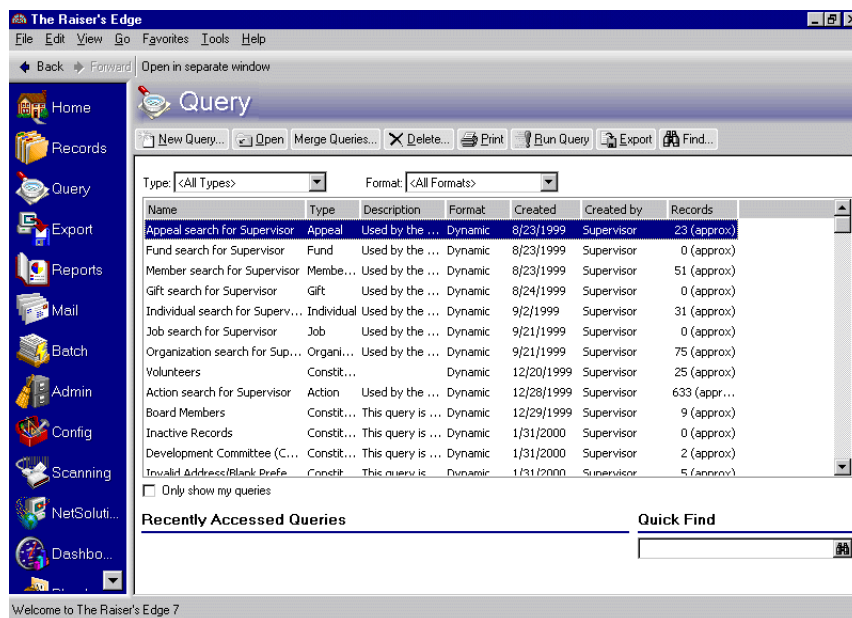
For more information about working in *Query*, see the *Query & Export Guide*.

2. If you marked the **Create query of changed constituents** checkbox when you updated the records, the "BBA Query of Changed Records" appears in the grid of available queries. Select the "BBA Query of Changed Records" and click **Open**. The Records in BBA Query of Changed Records screen appears.
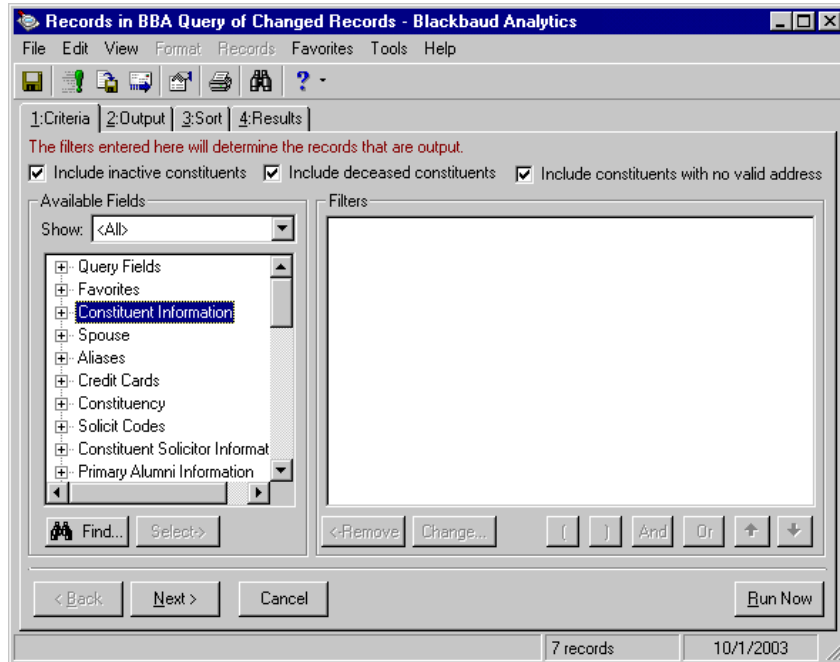
3. To display the list of changed records with the constituent names, select the Output tab.
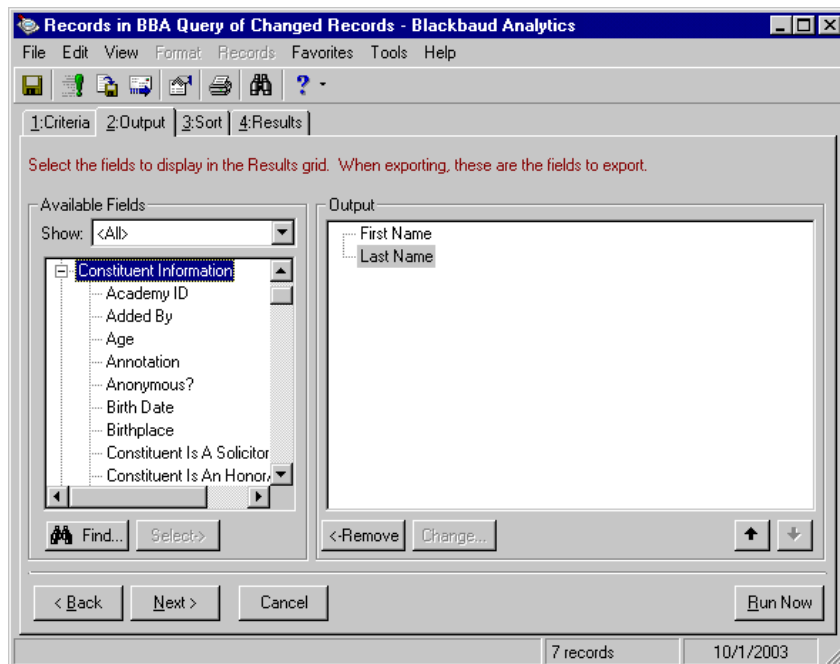
4. On the left side of the screen, in the **Available Fields** box, under the **Constituent Information** category, highlight "First Name" and click **Select**. Highlight "Last Name" and click **Select**. "First Name" and "Last Name" appear in the **Output** box.

5. Select the Results tab.
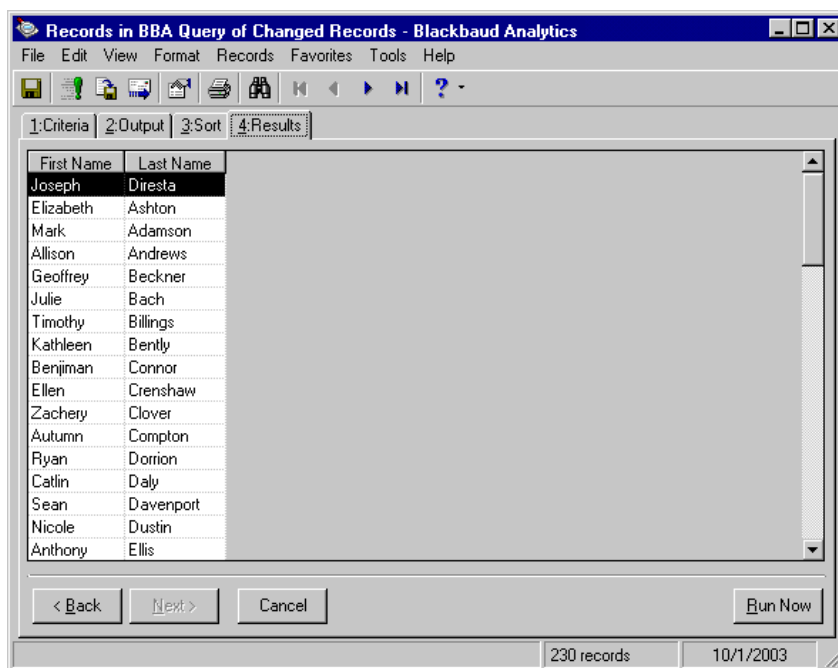
A list of all records changed in the update appear, displaying **First Name** and **Last Name**.

6. To open a constituent record, double-click the name. The constituent record appears.

You can view the new address information. For more information about working in constituent records, see the *Constituent Data Entry Guide*.

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