The Raiser's Edge™

Data Health Center Guide

Data Health Center Guide

AddressFinder

Contents

Blackbaud's **AddressFinder** helps you keep up with the 40 million Americans who change their address each year. The program provides you the most current address information available on your constituents. The data is based on the United States Postal Service NCOA Link™ database.

Once your **AddressFinder** subscription is activated, you can start submitting information for update using the Create AddressFinder Export File wizard. With the wizard, you can create and submit to Blackbaud an export file containing the data you want updated. In a few days, we provide you an updated export file, which you can download to your database from the **Data Health Center**.

Submit Data for Free Checkup

With the **Data Health Center**, you can submit data from your database to Blackbaud for a free checkup. The information you send is analyzed and missing, outdated, and incomplete information identified. For more information about using this free service, see "Free Data Checkup" on page 107.

Create and Submit Export File

When you are ready for Blackbaud to update your information, you must create an export file containing the information to be updated. The Create AddressFinder Export File wizard, takes you step-by-step through this process. After you complete the export file, the **Submit File Now** button sends the data to Blackbaud.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

➢ **Creating an export file and sending the file to Blackbaud**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.

Note: If you have already used **AddressFinder** to submit data to Blackbaud, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

Note: If you previously sent Blackbaud an export file and it has not yet been returned, a warning message appears when you attempt to submit a new export file. If you continue and submit the new export file, the previous file is canceled, and you receive results for only the new export file.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

2. On the Data Health Center page, in the **AddressFinder** row, click **Submit Your Data**. The Create AddressFinder Export File screen appears.

3. Click **Include** at the top of the screen to select the constituents whose addresses you want to certify. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears, so you can select the query containing the constituent records to update.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link.

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*.

4. Click **Include** in the **Addresses to Check** frame and select either **All Addresses** or **Selected Addresses** to certify. If you select **Selected Addresses**, the Customization Options for Addresses to Check screen appears, displaying an Individuals and an Organizations tab.

The **Selected Addresses** option allows you to use your data enrichment subscription to update only the records you know are in need or updating. We recommend updating the constituent's preferred address, but you can select any and all address types you want to include in the updating process. Remember, however, the number of addresses included affects the number of jobs processed. Each address counts as one record, so if you select all addresses and each constituent has four addresses, the number of records in your job is four times the number of constituents. For example, if you have 20,000 constituents, your export file has 80,000 records. That can cause you to go over the number of records allowed in the screening.

For information about completing the tabs, see "Individuals Tab" on page 5 and "Organizations Tab" on page 7.

5. In *The Raiser's Edge*, if a constituent's spouse is also a constituent in your database, a **Head of Household** checkbox appears on the General tab of the spouse relationship record, allowing you to determine who in the relationship should be designated as the head of household. The **Head of Household** checkbox is often used to determine who should receive a particular mailing. On the Create AddressFinder Export File screen, in the **'Head of Household' Processing** frame, you can choose how to handle this situation: **Export only constituents marked Head of Household**, **Export the first constituent found**, or **Export both constituents separately**.

Head of household processing applies only if both spouses are constituents and both are selected for the export. For example, if you use a query containing a constituent who has a spouse who is also a constituent, the head of household processing is not used.

Warning: If the head of household processing does apply and in the **'Head of Household' Processing** frame you select not to **Export both constituents separately**, the information updates on only the selected constituent's record.

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6. You can further refine your export criteria using the **Include these Constituents** frame. To include constituents with the **Is inactive** checkbox marked on the Bio 1 tab of their constituent record, mark **Inactive constituents**; to include constituents with the **Deceased?** checkbox marked on the Bio 1 tab of their constituent record, mark the **Deceased constituents** checkbox; to include constituents with the **Has no valid addresses** checkbox marked on the Bio 1 tab of their constituent record, mark the **Constituents with no valid address** checkbox.

7. Mark **Create control report** to print a report listing the criteria selected for the export and all constituents included in the export. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

8. Mark **Create exception query** to generate an exception file at the end of your export. The file contains all fields the program did not successfully export.

9. Mark **Create an output query** if you want to create a query of all records exported.

10. Click **Next**. The Contact Information tab appears.

11. Enter the name, telephone number, and email address of the individual in your organization we should contact with any questions about your data submission.

12. Click **Next**. The Summary tab appears, displaying an overview of the criteria you selected for your export file.

13. Click **Submit File Now** to send the file to Blackbaud. A message appears, confirming your file uploaded successfully.

Note: If you marked the **Create Control Report** option on the General tab, the report generates before the export file is submitted.

14. Click **OK**.

Individuals Tab

On the Individuals tab of the Customization Options for Addresses to Check screen, select the address type to certify 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 certify. 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 certify for each individual.

➢ **Completing the Individuals tab**

On the Individuals tab, you select the address type to certify for each individual constituent.

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, 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 01/01/2001. 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.

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 certification. To select the address type to certify, highlight an address type in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box. If you list multiple address types in the **Addresses to use** box, sort the address types in the order of importance. To move an address type in 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 right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to certify the Preferred address. Because the program selects the address to certify based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

3. In Step 3, you can use attributes to choose the address type to certify 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.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

For example, to certify addresses with the attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. 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>.

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.

5. Select the Organizations tab. For information about completing this tab, see "Organizations Tab" on page 7.

Organizations Tab

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to certify for organization constituents. The addresses of each organization constituent in the mailing list are processed using three or four steps on the Organizations tab, depending on what you select in Step 1.

➢ **Selecting the organization address**

1. In Step 1, select the address information you want to include: the address of an organization's contact (**Print contacts**) or the address of the organization only (**Print only the organization**). Your selection in Step 1 affects the rest of the steps on this tab.

Warning: If you select **Print Contacts** in Step 1, each contact for an organization counts as one record. For example if you have 10,000 organization records and each organization has four contacts, your export file has 40,000 organization records. If the addresses are shared, the contact address is updated if the organization address is updated.

2. In Step 2, if you select in Step 1 to include only the organization's address, move the address types to include from the **Addresses** box to the **Addresses to use** box. To select an address type, highlight the address type in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box. If you list multiple address types in the **Addresses to use** box, sort the address types in the order of 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 right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to certify the Preferred address. Because the program selects the address to certify based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

If in Step 1 you select to **Print contacts**, in Step 2 you must complete the following steps.

a. To specify the contact types to include, click **Contact Information**. 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 certification. To select the contact type to use, highlight the contact type in the **Contact types** list and click the single right arrow to move it to the **Contact types to include** list.

c. If you list multiple contact types in the **Contact types to include** list, sort the contact types in the order of importance. To move a contact type within the **Contact types to include** list, 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 by highlighting them in the **Contact types** list and clicking the single right arrow to move them to the **Contact types to include** list. If an organization has both contact types on its record, you want to include the address for the Matching Gift Coordinator. Because the program selects the contact type based on its position in the **Contact types to include** list, use the arrows to move the Matching Gift Coordinator to the beginning of the list.

d. You can also filter the contacts included based on attributes entered on the constituent records. Click the **Contact Attributes** button. The Contact Address Attributes to Consider screen appears.

In the Filter column, you can select to "Include" or "Exclude" addresses based on the attribute information.

Next, select the address attribute **Category** and **Description** on which to base this attribute filter. This information is pulled from the Attributes tab of the constituent Address screen.

Click **OK** to save your selections and return to the Contacts to Print screen.

Note: For more information about the Attributes tab, see the *Constituent Record Data Entry Guide*.

e. Mark the **Print contact name** checkbox to include the contact name with the address.

f. 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>.

g. If in Step 1 you selected to **Print contacts**, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button in Step 2. When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.

h. You can select an address attribute category and description that must be present in included addresses. 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.

In the Contact Address Attribute to Consider for this Report frame, select one of the following: **Include Contacts with one of these address attributes, no address attributes, or different address attribute categories or Only consider Contacts with one of these address attributes**. If you select the second option, you can also mark **If an Organization does not have a valid contact with one of these address attributes, consider Contacts with no address attributes or different address attribute categories**. For a detailed explanation of how each option processes addresses, click the **Click here for help and examples** link.

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>.

3. If in Step 1 you select to include only the organization's address, in step 3 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 in included address records. For example, to certify addresses with the attribute category of "Mailing Address" and a description of "Lost Address", enter the information on this screen. 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 in Step 1 you select 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

4. If in Step 1 you select to **Print only the organization**, a Step 4 appears on the tab. In Step 4, you select what the program should do if it cannot find an address for the organization satisfying your selections in Steps 1 through 3.

5. Click **OK** to save your changes.

Download New Address Information

Once Blackbaud certifies the information included in your export file and makes the updated file available, the **Download Update Results** link appears in the **AddressFinder** row under the **Update Data** column.

➢ **Downloading address information file**

Your updated address information is housed in a .zip file on Blackbaud's ftp site. Before you can commit the updated information to records in your database, you must first download this .zip file.

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. If the certified address file is ready, the **Download Update Results** link appears in the **AddressFinder** row under the **Update Data** column.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

2. Click **Download Update Results**. A progress bar appears, tracking the download process.

3. When the download is complete, the **Download Update Results** link changes to read **Update Data**, and the **Updated Address Report** link in the **Create Reports** column activates.

Updated Address Report

When Blackbaud updates your address information, you receive a data file containing the certified addresses. Before you import the new information into your database, use the **Updated Address Report** to compare the certified addresses with the current addresses in your database. The link is enabled after you download the data file from Blackbaud's ftp site. For more information, see "Download New Address Information" on page 11.

➢ **Running an Updated Address Report**

1. From the Data Health Center page, after you download the updated results, click the **Updated Address Report** link in the **Create Reports** column. The Update Address Report screen appears, displaying the General tab.
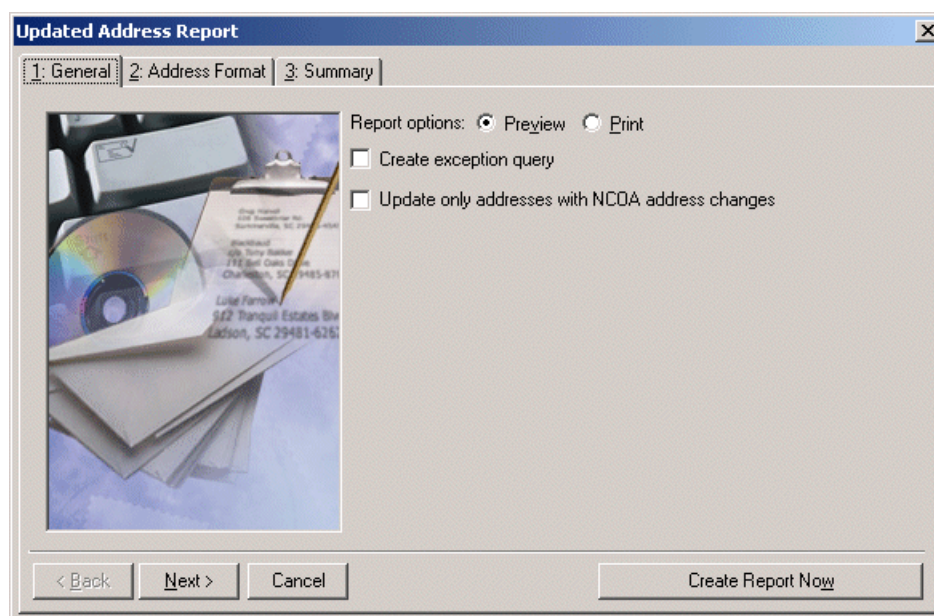
2. In the **Report options** field, select how you want to view the report: **Print** or **Preview**. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

3. To create a static constituent query containing the names of the constituents whose addresses could not be certified by Blackbaud, mark the **Create exception query** checkbox. We strongly recommend you mark this checkbox so you can track the uncertified addresses.

4. If you want to include only the addresses of people that have moved (addresses where NCOA information was found), mark the **Update only addresses with NCOA address changes** checkbox. If you leave this option unchecked, the program validates all addresses (standardizing them to the USPS preferred format) and updates any records with NCOA change information.

5. When the **City** field is a look-up field in the database, and you update address information that includes city names not on the table list in the database, an exception occurs and the new address information is not imported. If you mark the **Create table entries** checkbox (not pictured), the program generates new table entries for cities included in you updated address file but not in *The Raiser's Edge* database.

6. Click **Next**. The Address Format tab appears.

7. On the Address Format tab, select how you want secondary address lines to appear.

8. Mark **Retain 'care of' and 'attention' information from the second line of the original address** if you want to retain any existing "care of" and "attention" information when you update the address.

9. For information about the What are abbreviated address elements in the USPS format link, see "USPS Formats for Abbreviated Addresses" on page 21.

10. Click **Next**. A summary of the report options you selected appears.

11. Click **Create Report Now** to generate the report.

Note: If on the General tab you selected to create an exception query, a screen appears before the report is generated, asking you to name and define your query.

12. The program generates the report. If on the General tab you selected to preview the report, the report previews on your screen. You can print the preview report by clicking **Print** at the top of the preview screen. The report prints to your default printer.

If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

    a. When the report appears on the screen, click the **Export** button.

    b. Select Word format and Disk File.

    c. Click **OK**.

    d. Save the file on your hard drive in a location of your choice.

    e. To view, open the document in *Word*.

13. After reviewing the updated data in the Updated Address Report, you can import the updated data into *The Raiser's Edge*. For information about importing the data, see "Updating address information" on page 15.

Update Address Information

After you download the .zip file containing your updated information and review the updates using the Updated Address Report, you can commit the information to records in your database using the **Update Data** link that appears in the **AddressFinder** row under the **Update Data** column. This link appears after you run the download. For more information about downloading the file, see "Download New Address Information" on page 11.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

➢ **Updating address information**

Before updating the data in *The Raiser's Edge*, you can review the information contained in the update file by clicking the **Updated Address Report** link. For information about running the report, see "Running an Updated Address Report" on page 12

Note: Make sure all users are logged out of *The Raiser's Edge* before you downlad an updated file.

1. Make sure you have a backup copy of your database.

2. From the Data Health Center page, click the **Update Data** link in the **AddressFinder** row under the **Update Data** column. The Update Addresses screen appears displaying the General tab.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

3. Mark the **Create exception query** checkbox to create a static constituent query containing the names of the constituents whose addresses could not be certified. We strongly recommend you mark this checkbox so you can further research the addresses or mark them as a lost.

4. If you want to include only the addresses of people that have moved (addresses where NCOA information was found), mark the **Update only addresses with NCOA address changes** checkbox. If you leave this option unchecked, the program validates all addresses (standardizing them to the USPS preferred format) and updates any records with NCOA change information.

5. When the **City** field is a look-up field in the database, and you update address information that includes city names not on the table list in the database, an exception occurs and the new address information is not imported. If you mark the **Create table entries** checkbox (not pictured), the program generates new table entries for cities included in you updated address file but not in *The Raiser's Edge* database.

6. In the **Save import file to** field, enter the location to which you want to save the import file on your hard drive. Click the ellipsis button to map to the location.

7. Click **Next**. The Process Options tab appears.

8. In the **Processing Mode** frame select one of the following:

   • Select **Batch mode** if you want the program to update all the addresses at one time. If an address cannot be updated, an exception is added to the exception query, if you chose to create one on the General tab.

   Note: If you select the **Interactive mode** and decide after you start the update process you want to change to the **Batch mode**, you can by clicking **Auto** on the Address Validation screen.

   • Select **Interactive mode** if you want to update one address at a time. This allows you to review each address before committing it to your database.

9. In the **Reporting Options** frame, mark the **Create control report** checkbox to create a report containing information about the certified addresses. If you mark this checkbox, select whether to **Print** or **Preview** the report. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

   The control report contains the constituent name and ID, address, and an exception code where applicable for each constituent processed by your data correction service. The control report also includes the report date and address correction service that certified the address.

   If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

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

    The **Date from** field defaults to today's date, and for new addresses, leave the **Date to** field blank.

11. If you want to save the original address on the Address 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 you want recorded with the old address. The **Date to** field defaults to today's date.

Warning: When updating all addresses for a constituent using the **Batch mode**, all addresses for the constituent are changed to reflect the information entered in the **Add the Following to New Certified Addresses** frame and the **Save Old Address in Constituent Address List** frame, including the **Address Type**.

You can leave fields in the **Add the Following to New Certified Addresses** frame and 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.

12. Click **Next**. The Address Format tab appears.

13. In the **Address Capitalization** frame, select **Capitalize entire address** if you want all letters in the address capitalized. When you choose **Proper case entire address**, your data correction service uses upper and lower case in the appropriate places.

Note: The capitalization option you select in the **Address Capitalization** frame does not affect how the program imports the corrected addresses into your database.

14. In the **Address Lines Format** frame, select how you want secondary address lines to appear.

15. Mark **Retain 'care of' and 'attention' information from the second line of the original address** if you want to retain any existing "care of" and "attention" information when you update the address.

16. Mark **Do not abbreviate address elements according to USPS format** if you do not want the program to change all your address elements, such as State information and directional indicators, to the USPS standardized abbreviations.

17. For information about the **What are abbreviated address elements in the USPS format** link, see "USPS Formats for Abbreviated Addresses" on page 21.

18. Click **Next**. The Summary tab appears, summarizing the options you selected for the update.
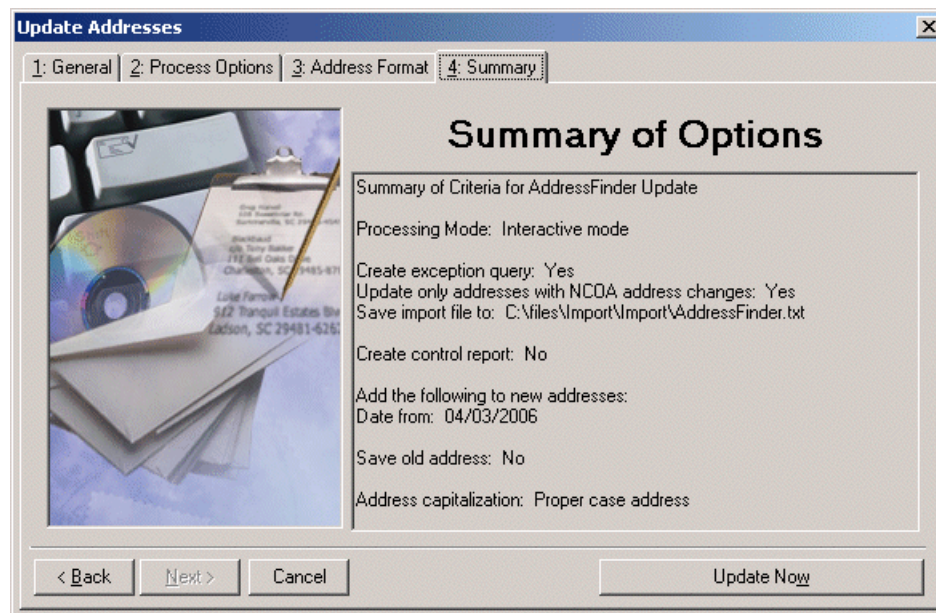
19. Click **Update Now** to update the addresses in your database.

Note: If on the General tab you selected to create an exception query, a screen appears before the update runs, asking you to name and define your query.

If on the Process Options tab you selected the **Batch mode**, all addresses automatically update.

If you selected the **Interactive mode**, the Address Validation screen appears.

Complete the following steps.

a. The **Current Address Information** frame displays the constituent address information as it currently appears in your database.

b. Certified address information displays on the bottom half of the screen.

c. Mark the **Add footnote as an address attribute** checkbox to copy a footnote flag to the constituent record as an address attribute. If you cannot certify an address, footnote flags indicate the reason the address cannot be certified. The footnote flag appears as an address attribute with the **Category** of NCOA Footnote and a **Description** of the footnote flag.

d. The field below the **Add footnote as an address attribute** checkbox displays the reason the address cannot be certified. 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.

e. 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.

f.   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 01/01/2003".

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

Note: After you update your information, the **Update** link on the Data Health Center page changes, displaying the date you ran the update. The link remains active, allowing you to run the update again if necessary.

h. Click the **Update Address** button to update the current address in your database with the new certified address; click the **Skip** button to skip the address; click the **Auto** button to change from **Interactive mode** to **Batch mode**; click **Cancel** to end the updating addresses session.

USPS Formats for Abbreviated Addresses

The United States Postal Service has compiled a comprehensive list of elements, standardizing the smallest meaningful parts of names and addresses. If you choose to use the USPS abbreviations in your mailings, **AddressFinder** formats the abbreviations based on these USPS standards.

The standard abbreviations include the following:

*   States, such as Ohio = OH, South Carolina = SC
*   Street suffixes, such as avenue = AVE, Bend = BND, Cape = CPE
*   Secondary unit designators, such as apartment = APT, basement = BMST
*   Directional information, such as North = N, Northeast = NE, Southwest = SW

For the complete up-to-date list of standard USPS abbreviations, visit https://pe.usps.com/text/pub28/welcome.htm

Giving Score

Contents

The **Giving Score** is an analytical and statistical rating system that allows you to determine how best to communicate with each of your supporters, and focus on the best candidates for your fundraising efforts and appeal mailings. A prospect rating of VIP, Fan, Acquaintance, or Long-Shot is assigned to every individual in your database based on their giving history and capacity to give. To determine Giving Score ratings, the Giving Score uses historical gift data you already have about your constituents, such as cash and recurring gifts, and also considers external variables you may not know, such as summarized credit information and demographic information from the US Census Bureau. For example, those who are comfortable financially, such as if they live in expensive homes, rent in expensive neighborhoods, and have a high household income, are considered to be your best prospects.

To use the **Giving Score**, you must submit your data through the **Data Health Center** to *Target Analytics* to be scored. This analysis does not change or remove any information in your database, but rather categorizes your supporters based on their Giving Scores. After your data is scored, you return to the **Data Health Center** to download the information into *The Raiser's Edge*. You can then view a Giving Score report to summarize the data that has been scored, use the Giving Score query to create lists of constituents, and create and analyze Giving Score *Dashboard* panels.

Giving Score Prospect Ratings

When *Target Analytics* scores your data for the Giving Score, each individual in your database receives a prospect rating of VIP, Fan, Acquaintance, or Long-Shot based on their giving history and capacity to give. To determine Giving Score ratings, *Target Analytics* also considers gift data such as cash and recurring gifts. These ratings can help you increase your average gift amount and reduce your cost per gift by focusing cultivation efforts on those most likely to give to your organization.

VIP

Individuals with a Giving Score rating of Very Important Person (VIP) are your best prospects and donors. They are likely passionate about your organization's mission, and have the financial capacity to make large donations. Those associated with major giving are typically your VIPs.

The main goal with your VIPs is to keep them as such. Through fundraising efforts and appeal mailings, you can maintain high communication and engage in more personal contact so they continue to support your organization.

Fan

Individuals with a Giving Score rating of Fan have a high affiliation with your organization and are likely passionate about your mission, but do not have the same capacity to give as VIPs. Fans have likely given to your organization in the past and are often associated with annual giving.

You should try to upgrade your Fans to VIP's by soliciting them through fundraising efforts and encourage them to give more often. The investment in communicating with your Fans allows you to ask for higher gift amounts in the future.

Long-Shot

Individuals with a Giving Score rating of Long-Shot have a low affiliation with your organization but a high capacity to give.

The goal with Long-Shots is to upgrade them to VIPs. These donors have a high capacity to give and are potential major giving candidates. To try to engage Long-Shots, communicate compelling information about your organization, and get them passionate about your mission. Closely analyze your Long-Shots and only spend a significant amount of time to cultivate those with the greatest potential to become regular donors.

Acquaintance

Individuals with a Giving Score rating of Acquaintance have both a low affiliation with your organization and a low financial capacity to give. Acquaintances are sometimes one-time donors, or perhaps have no giving history at all with your organization. Some Acquaintances may be first-time donors who have not yet proven themselves as loyal donors.

Try to upgrade Acquaintances to Fans through low-cost methods of communication and education. Spend the least amount of time and money on Acquaintances.

Submit Data to be Scored

With the **Data Health Center**, you create an export file to submit your data to *Target Analytics* to be scored for the Giving Score. *Target Analytics* evaluates every individual in your database based on their giving history and capacity to give, and assigns a Giving Score. For more information about each Giving Score, see "Giving Score Prospect Ratings" on page 23.

➢ **Submit your data to Target Analytics**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All available health center services appear.

Note: If *Target Analytics* already scored your data for the Giving Score, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

Note: If you previously sent *Target Analytics* an export file and it has not yet been returned, a warning message appears when you attempt to submit a new export file. If you submit a new export file, the previous file is canceled and you receive results for the new export file only.

2. On the Data Health Center page, in the **Giving Score** row, click **Submit Your Data**. The Create Giving Score Export File screen appears.

3. Enter the name, telephone number, and email address of the individual in your organization we should contact with any questions about your data submission.

4. Click **Submit File Now**. The Giving Score export file is created and sent to *Target Analytics*, and a confirmation message appears.

5. Click **OK**.

Download Giving Score Information

After *Target Analytics* scores the information included in your export file and makes the updated file available, the **Download Update Results** link appears in the **Giving Score** row under the **Update Data** column.

➢ **Download Giving Score information file**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. If the Giving Score file is ready, the **Download Update Results** link appears in the **Giving Score** row under the **Update Data** column.

Note: If Blackbaud sends you a response file by means other than the **Data Health Center**, such as a CD or email, click **Manual Data Return** under **Awaiting Update Results** in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

2. Click **Download Update Results**. To track the download process, a progress bar appears.

3. When the download is complete, the **Download Update Results** link reads **Update Data**, and the **Giving Score Report** link activates in the **Create Reports** column.

4. Click **Update Data**. To track the update process, a progress bar appears.

5. After the download is finished, the Welcome to Giving Score screen appears.

From this screen, you can access the Giving Score Control Report, use the Giving Score query, or use the Giving Score dashboard panels.
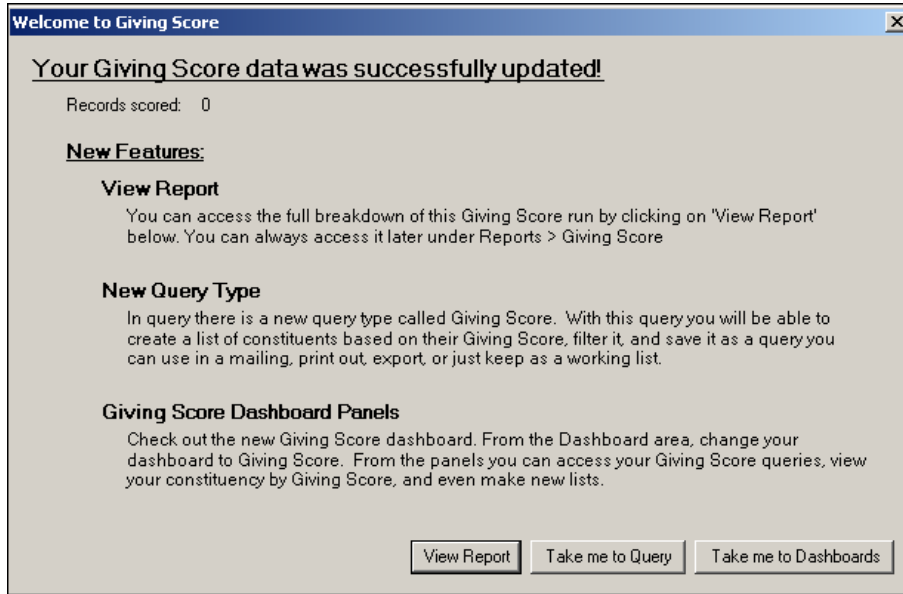
For information about each Giving Score, see "Giving Score Prospect Ratings" on page 23.

Giving Score Control Report

After your data is scored by *Target Analytics* for the Giving Score, and you have downloaded that information into **The Raiser's Edge**, you can view the Giving Score Control Report for a summary of how your data was scored.

Note: For information about how to download updated data for the Giving Score, see "Download Giving Score Information" on page 25.

The Giving Score Control Report breaks down the number of individuals who were given a prospect rating of VIP, Fan, Acquaintance, or Long-Shot. The report also provides the number of records in your database that were scored, the number of records that were not scored, the date you last updated your data for the Giving Score, and a description of each Giving Score rating.

Note: Individual constituents with a United States address are the only records scored for the Giving Score. All other records, such as organizations or individuals without address information, receive no score.

To view the Giving Score Control Report, from the Data Health Center, click **Giving Score Report** in the **Create Reports** column.
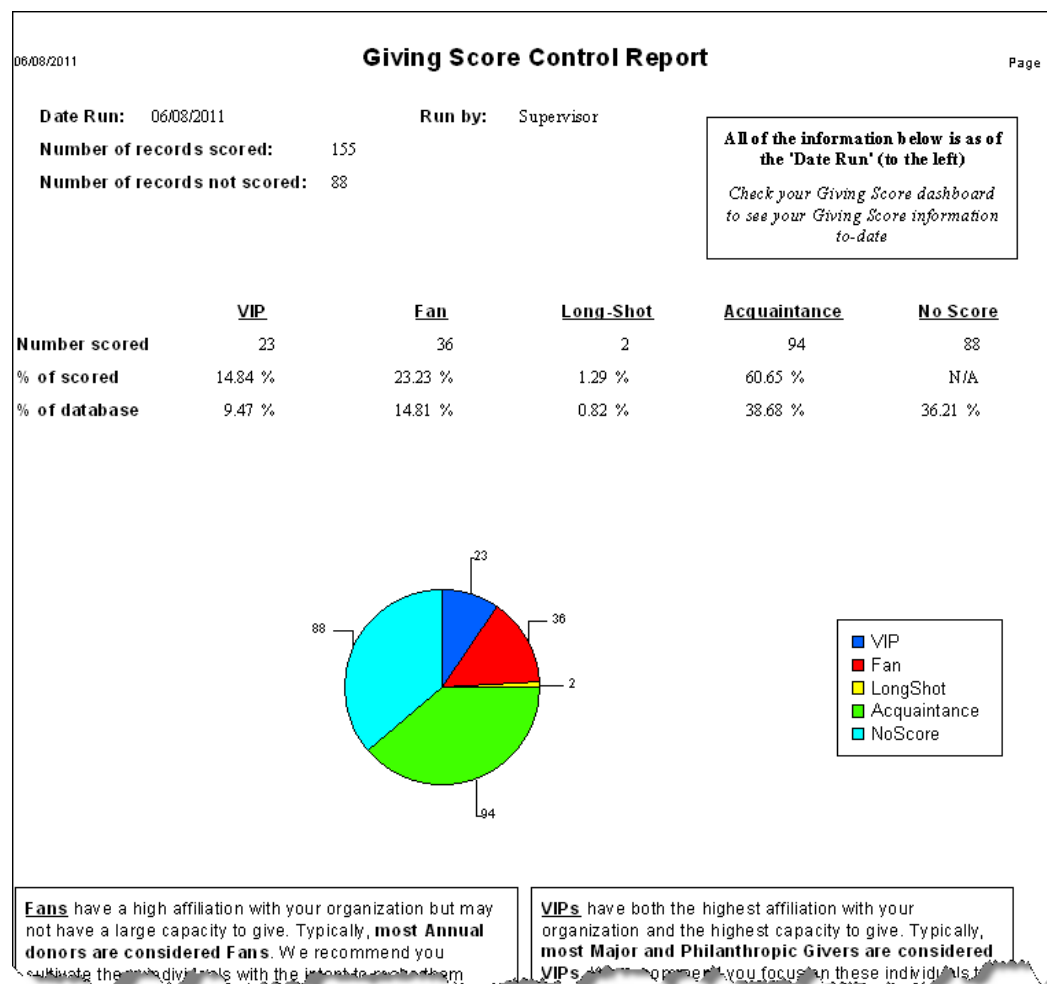
You can also view the Giving Score Control Report from the Welcome to the Giving Score screen that appears after you successfully download your updated data into *The Raiser's Edge*. From the Welcome to the Giving Score screen, click **View Report**.

DeceasedRecord Finder

Contents

Blackbaud's **DeceasedRecordFinder** identifies deceased constituents in your database. The utility searches the Social Security Death Benefit database and other proprietary sources to locate up-to-date data.

Once your **DeceasedRecordFinder** subscription is activated, you can start submitting information for update using the Create DeceasedRecordFinder Export File wizard. With the wizard, you can create and submit to Blackbaud an export file containing the data you want updated. In a few days, we provide you an updated export file, which you can download to your database from the **Data Health Center**

Submit Data for Free Checkup

With the **Data Health Center**, you can submit data from your database to Blackbaud for a free checkup. The information you send is analyzed and missing, outdated, and incomplete information identified. For more information about using this free service, see "Free Data Checkup" on page 107.

Create and Submit Export File

To send your data to Blackbaud, you must create an export file containing the information you want updated. The Create DeceasedRecordFinder Export File wizard takes you step-by-step through this process. After you complete the export file, the **Submit File Now** button sends the data to Blackbaud.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

➢ **Creating an export file and sending the file to Blackbaud**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All available health center services appear.

Note: If you previously sent Blackbaud an export file and it has not yet been returned, a warning message appears when you attempt to submit a new export file. If you continue and submit the new export file, the previous file is canceled, and you receive results for only the new export file.
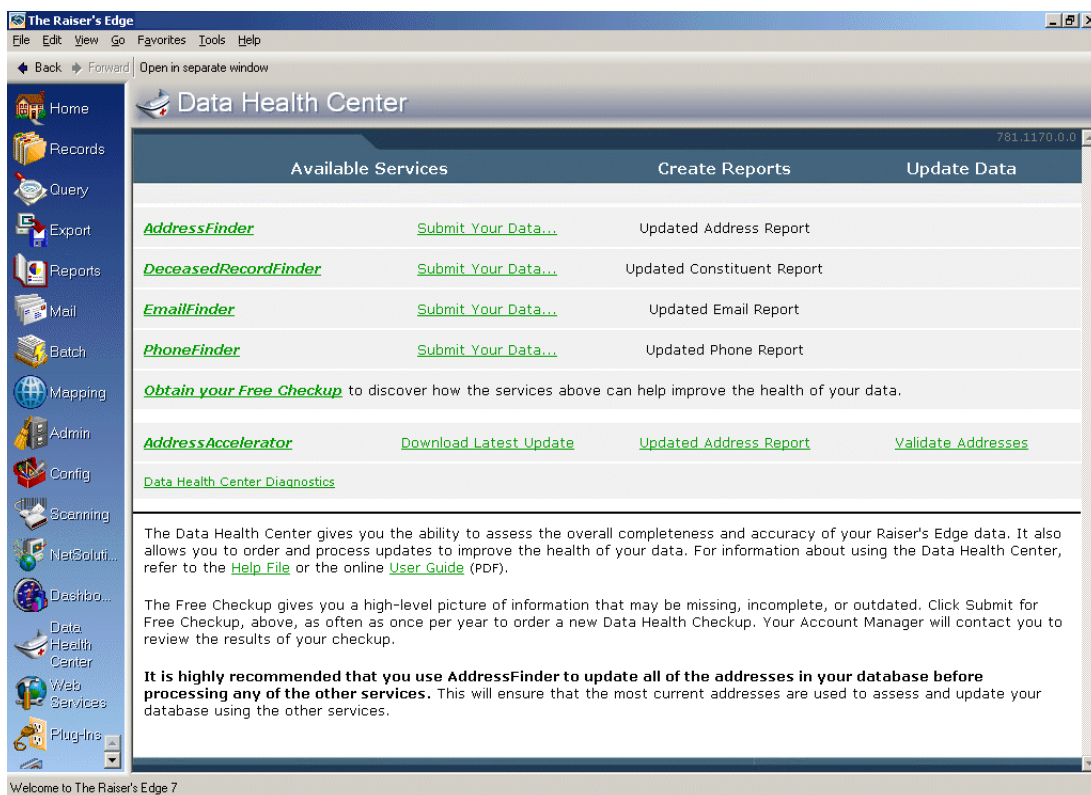
2. On the Data Health Center page, in the **DeceasedRecordFinder** row, click **Submit Your Data**. The Create DeceasedRecordFinder Export File screen appears.

Note: If you have already used **DeceasedRecordFinder** to submit data to Blackbaud, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

3. Click **Include** at the top of the screen to select the constituent records you want to update. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears so you can select a query containing the constituents 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*.

4. When you click **Include** in the **Addresses to Check** frame, you can select to include **All Addresses** or **Selected Addresses** in the update. If you select **Selected Addresses** the Customization Options for Addresses to Check screen appears.

The **Selected Addresses** option allows you to use your data enrichment subscription to update only the records you know are in need or updating. The number of addresses included affects the number of jobs processed. Each address counts as one record, so if you select all addresses and each constituent has four addresses, the number of records in your job is four times the number of constituents. For example, if you have 20,000 constituents, your export file has 80,000 records. That can cause you to go over the number of records allowed in the screening.

For information about completing this screen, see "Customization Options for Addresses to Check" on page 34.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

5. In *The Raiser's Edge*, if a constituent's spouse is also a constituent in your database, a **Head of Household** checkbox appears on the General tab of the spouse relationship record, allowing you determine who in the relationship should be designated as the head of household. The **Head of Household** checkbox is often used to determine who should receive a particular mailing. On the Create DeceasedRecordFinder Export File screen, in the **'Head of Household' Processing** frame, select how to handle this situation: **Export only constituents marked Head of Household**, **Export the first constituent found**, or **Export both constituents separately**.

Head of household processing applies only if both spouses are constituents and both are selected for the export. For example, if you use a query containing a constituent who has a spouse who is also a constituent, the head of household processing is not used.

Warning: If the head of household processing does apply and in the **'Head of Household' Processing** frame you select not to **Export both constituents separately**, the information updates on only the selected constituent's record.

When searching for information about deceased constituents, it is recommend to include both constituents by selecting **Export both constituents separately**.

6. You can further refine your export criteria using the **Include these Constituents** frame. To include constituents with the **Is inactive** checkbox marked on the Bio 1 tab of their constituent record, mark **Inactive constituents**; to include constituents with the **Has no valid addresses** checkbox marked on the Bio 1 tab of their constituent record, mark the **Constituents with no valid address** checkbox.

7. Mark **Create control report** to print a report listing the criteria selected for the export and all constituents included in the export. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

8. Mark **Create exception query** to generate an exception file at the end of your export. The file contains all fields the program did not successfully export.

9. Mark **Create an output query** if you want to create a query of all records exported.

10. Click **Next**. The Contact Information tab appears.

11. Enter the name, telephone number, and email address of the individual in your organization we should contact with any questions about your data submission.

12. Click **Next**. The Summary tab appears, displaying an overview of the criteria you selected for your export file.

13. Click **Submit File Now** to send the file to Blackbaud. A message appears, confirming your file uploaded successfully.

Note: If you marked the **Create Control Report** option on the General tab, the report generates before the export file is submitted.

14. Click **OK**.

Customization Options for Addresses to Check

On the Customization Options for Addresses to Check screen, select the address information you want to include in your export. Blackbaud uses address information to locate constituent update data.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

The program selects an address for each constituent using four steps and considers seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for a constituent, select an alternate address. It is important to indicate your preferences in each of the four steps so the program can select the best address for each constituent.

➢ **Completing the Customization Options for Addresses to Check screen**

On this screen, you select the address information you want to include in your export.

1. In Step 1, indicate whether seasonal addresses should be included by marking the **Consider addresses with seasonal dates as of** checkbox. When you mark this checkbox, 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 01/01/2001. 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.

2. In Step 2, specify the addresses to consider if a valid seasonal address is not found in Step 1 or if you chose not to include seasonal addresses. To select the address type to use, 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, sort the address types in the order of importance. To move an address type within the **Addresses to use** box, highlight the address type and click the up or down arrow. 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 include the Preferred address. Because the program selects the address based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

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

On this screen, select an attribute category and description that must be present on an address record in order for the address to be considered for the export. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button, listing the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

4. In Step 4, select the address type the program should export if it cannot find an address type meeting your selections in Steps 1 through 3.

5. When you finish entering customization options, click **OK**. You return to the Create DeceasedRecordFinder Export File screen.

Note: It is not necessary to include organization records when looking for deceased constituents; therefore, there is no need for the Organizations tab on the Customization Options for Addresses to Check screen.

Download Updated Information

Once Blackbaud updates the information included in your export file and makes the updated file available, the **Download Update Results** link appears in the **DeceasedRecordFinder** row under the **Update Data** column.

➢ **Downloading the updated information file**

Your updated record information is housed in a .zip file on Blackbaud's ftp site. Before you can commit the updated information to records in your database, you must first download this .zip file.

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. If the updated file is ready, the **Download Update Results** link appears in the **DeceasedRecordFinder** row under the **Update Data** column.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

2. Click **Download Update Results**. A progress bar appears, tracking the download process.

3. When the download is complete, the **Download Update Results** link changes to read **Update Data**.

Updated Constituent Report

When Blackbaud updates and corrects your constituent record information, you receive a data file containing the corrected deceased status of the selected constituents. Before you import the updated information into your database, use the **Updated Constituent Report** to compare the updated information with the current information in your database. The link is enabled after you download the data file from Blackbaud's ftp site. For more information, see "Download Updated Information" on page 36.

➢ **Running an Updated Constituent Report**

1. After downloading the updated results, click the **Updated Constituent Report** link in the **Create Reports** column. The Update Constituent Report screen appears, displaying the General tab.

Note: For information about downloading the updated results, see "Download Updated Information" on page 36.

2. In the **Report options** field, select how you want to view the report: **Print** or **Preview** on your computer screen. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

3. To create a static constituent query containing the names of all constituents included in the update, mark **Create output query**. You can then access the query file in *Query*.

4. To create a static constituent query containing the names of the constituents whose information could not be updated by Blackbaud, mark the **Create exception query** checkbox. You can then access the query file in *Query*.

5. Click **Next**. A summary of the report options you selected appears.
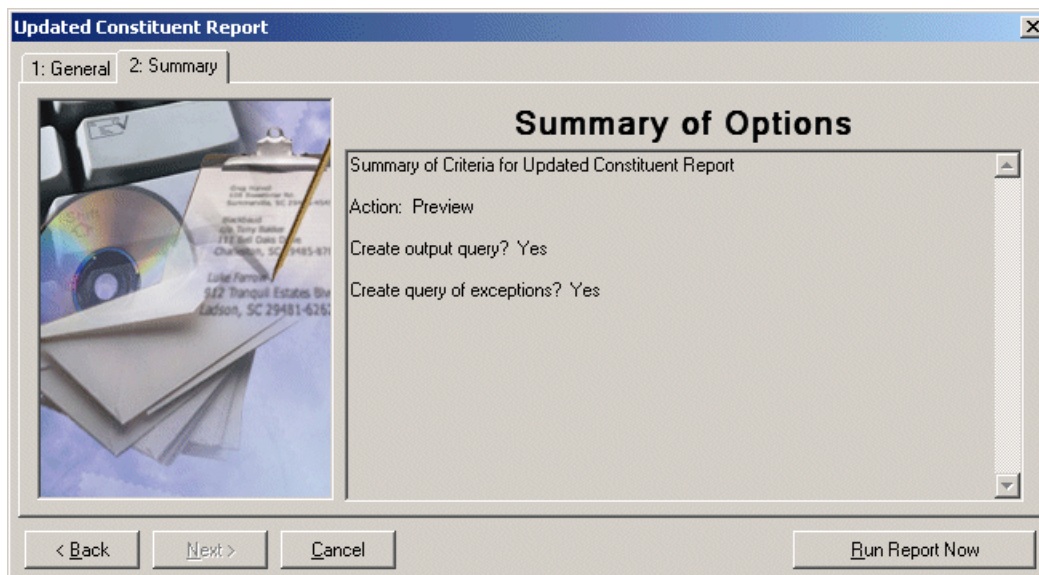
6. Click **Run Report Now** to generate the report.

Note: If on the General tab you selected to create a query, a screen appears before the report is generated, asking you to name and define your query.

7. The program generates the report. If on the General tab you selected to preview the report, the report previews on your screen. You can print the preview report by clicking **Print** at the top of the preview screen. The report prints to your default printer.

If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

8. After reviewing the updated data in the Updated Constituent Report, import the updated data into *The Raiser's Edge*. For information about importing the data, see "Updating constituent information" on page 39.

Update Constituent Information

After you download the .zip file containing your updated information and review the updates using the Updated Constituent Report, you can commit the information to records in your database using the **Update Data** link that appears in the **DeceasedRecordFinder** row under the **Update Data** column. This link appears after you run the download. For more information about downloading the file, see "Download Updated Information" on page 36.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

➢ **Updating constituent information**

Before updating the data in *The Raiser's Edge*, review the information contained in the update file by clicking the **Updated Constituent Report** link. For information about running the report, see "Running an Updated Constituent Report" on page 37.

1. From the Data Health Center page, click the **Update Data** link. The DeceasedRecordFinder Update screen appears, displaying the General tab.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

2. Mark the **Create query of records updated** checkbox to create a static constituent query containing all constituent records included in the update.

3. Mark the **Create query of exceptions** checkbox to create a static constituent query containing the names of the constituents whose records could not be updated.

4. In the **Save import file to** field, enter the location on your hard drive to which you want to save the import file. Click the ellipsis button to map to the location.

5. Click **Next**. The Processing Options tab appears.
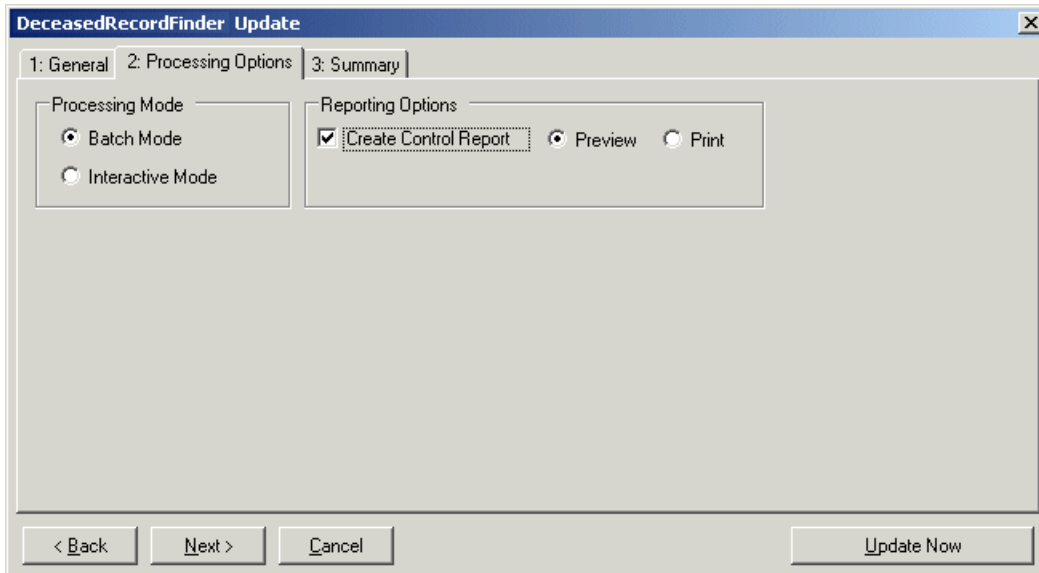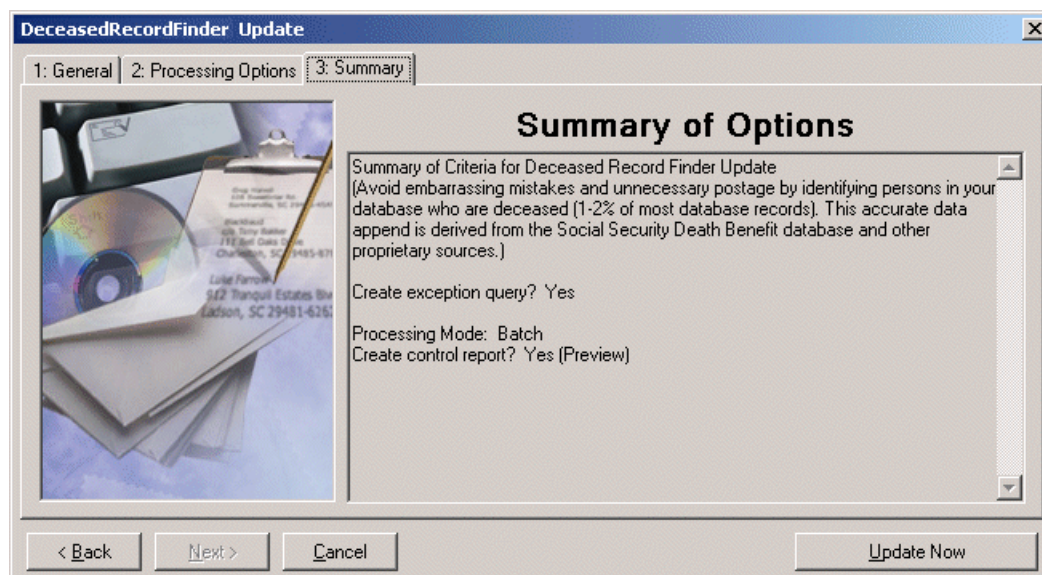
6. In the **Processing Mode** frame select one of the following:

   • Select **Batch mode** if you want the program to update all records at one time. If a record cannot be updated, an exception is added to the exception query, if you chose to create one on the General tab.

   • Select **Interactive mode** if you want to update one record at a time. This allows you to review each record before committing it to your database.

7. In the **Reporting Options** frame, mark the **Create Control Report** checkbox to create a report containing information about the updated records. If you mark this checkbox, select whether to **Print** or **Preview** the report. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

   If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

8. Click **Next**. The Summary tab appears, displaying the criteria you selected for your update.

Note: If on the General tab you selected to create an exception or updated records query, a screen appears before the update runs, asking you to name and define your query.

9. Click **Update Now** to update the addresses in your database.

If on the Processing Options tab you selected the **Batch mode**, all records are automatically updated.

If you selected the **Interactive mode**, the Interactive Update - DeceasedRecordFinder screen appears.

Complete the following steps.

    a. In the **Change ?** column, mark the checkbox next to each **Constituent Name** you want to be tagged as deceased in your ***Raiser's Edge*** database.

    b. Click the **Update Now** button to update the records in your database; click **Select All** to select all the constituents listed; click **Deselect All** to unselect all the constituents listed; click **Cancel** to end the updating session.

10. After you update your information, the **Update** link on the Data Health Center page changes, displaying the date you ran the update. The link remains active, allowing you to run the update again if necessary.

After you commit the updates to your records, an attribute is added to the Attributes tab, indicating how the death was confirmed: Death Certificate, Relative Verified, Unconfirmed.

EmailFinder

In this chapter

Email provides you an effective, low-cost, direct method to communicate with your constituents. Unfortunately, locating email addresses for older records in your database and keeping up with ever-changing addresses on those records that do include email information is difficult. Blackbaud's **EmailFinder** can help. Match rates for **EmailFinder** range from 8-20% of total records. Once an address is added or updated, you can send messages to the new addresses, verifying the recipients' interest in receiving future email. Data sources for email addresses include *Harris Connect*.

Once your **EmailFinder** subscription is activated, you can start submitting information for update using the Create EmailFinder Export File wizard. With the wizard, you create and submit to Blackbaud an export file containing the data you want updated. In 4 - 6 weeks, we provide you an updated export file, which you can download to your database from the **Data Health Center**.

Submit Data for Free Checkup

With the **Data Health Center**, you can submit data from your database to Blackbaud for a free checkup. The information you send is analyzed and missing, outdated, and incomplete information identified. For more information about using this free service, see "Free Data Checkup" on page 107.

Create and Submit Export File

When you are ready for Blackbaud to update your information, you must create an export file containing the information to include in the update. The Create EmailFinder Export File wizard takes you step-by-step through this process. After you complete the export file, the **Submit File Now** button sends the data to Blackbaud.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

➢ **Creating an export file and sending the file to Blackbaud**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.

Note: If you have already used **EmailFinder** to submit data to Blackbaud, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

Note: If you previously sent Blackbaud an export file and it has not yet been returned, a warning message appears when you attempt to submit a new export file. If you continue and submit the new export file, the previous file is canceled, and you receive results for only the new export file.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

2. On the Data Health Center page, in the **EmailFinder** row, click **Submit Your Data**. The Create EmailFinder Export File screen appears displaying the General tab.

Note: If you have already used **EmailFinder** to submit data to Blackbaud, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

3. Click **Include** at the top of the screen to select the constituent records for which you want to update email address information. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears, so you can select the query containing the constituent records to update.

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

4. When you click **Include** in the **Addresses to Check** frame, you can select to include **All Addresses** or **Selected Addresses** in the update. If you select **Selected Addresses**, the Customization Options for Addresses to Check screen appears.

   The **Selected Addresses** option allows you to use your data enrichment subscription to update only the records you know are in need or updating. The number of addresses included affects the number of jobs processed. Each address counts as one record, so if you select all addresses and each constituent has four addresses, the number of records in your job is four times the number of constituents. For example, if you have 20,000 constituents, your export file has 80,000 records. That can cause you to go over the number of records allowed in the screening.

   For information about completing this screen, see "Customization Options for Addresses to Check" on page 48.

5. In *The Raiser's Edge*, if a constituent's spouse is also a constituent in your database, a **Head of Household** checkbox appears on the General tab of the spouse relationship record, allowing you to determine who in the relationship should be designated as the head of household. The **Head of Household** checkbox is often used to determine who should receive a particular mailing. On the Create AddressFinder Export File screen, in the **'Head of Household' Processing** frame, you can choose how to handle this situation: **Export only constituents marked Head of Household**, **Export the first constituent found**, or **Export both constituents separately**.

   Head of household processing applies only if both spouses are constituents and both are selected for the export. For example, if you use a query containing a constituent who has a spouse who is also a constituent, the head of household processing is not used.

Warning: If the head of household processing does apply and in the **'Head of Household' Processing** frame you select not to **Export both constituents separately**, the information updates on only the selected constituent's record.

6. You can further refine your export criteria using the **Include these Constituents** frame. To include constituents with the **Is inactive** checkbox marked on the Bio 1 tab of their constituent record, mark **Inactive constituents**; to include constituents with the **Deceased?** checkbox marked on the Bio 1 tab of their constituent record, mark the **Deceased constituents** checkbox; to include constituents with the **Has no valid addresses** checkbox marked on the Bio 1 tab of their constituent record, mark the **Constituents with no valid address** checkbox.

7. Mark **Create control report** to print a report listing the criteria selected for the export and all constituents included in the export. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

8. Mark **Create exception query** to generate an exception file at the end of your export. The file contains all fields the program did not successfully export.

9. Mark **Create an output query** to create a query of all records exported.

10. Click **Next**. The Opt Out Email tab appears. When Blackbaud locates a new email address, an email message is automatically sent to the new address to confirm the address and allow the owner of the address to opt out of receiving any additional email messages.

11. In the **From** field, enter the email address to display in the **From** field of email messages sent to your constituents.

12. Enter the **Subject** to include in the email message.

13. In the **Reply To** field, enter the email address to which any replies should be sent, if different from the address entered in the **From** field.

14. Click **Next**. The Opt Out Email 2 tab appears.

15. Enter the name of your **Organization** along with **Address**, **Phone Number**, **Web Site**, and **Mission** information. This information is merged with the standard opt out email message displayed in the bottom half of the tab.

16. Click **Next**. The Contact Information tab appears.

17. Enter the name, telephone number, and email address of the individual in your organization we should contact with any questions about your data submission.

18. Click **Next**. The Summary tab appears, displaying an overview of the criteria you selected for your export file.
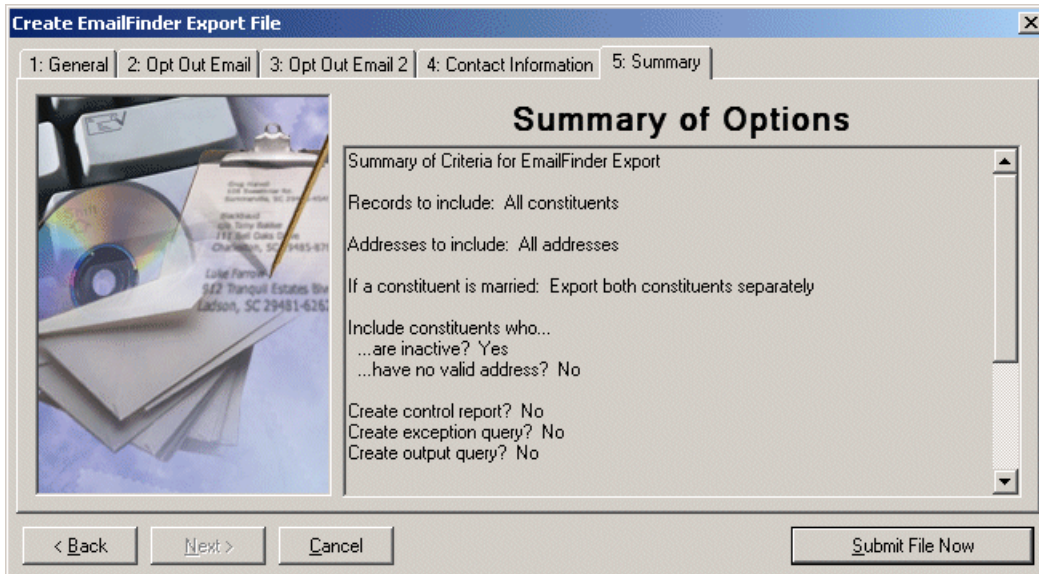
19. Click **Submit File Now** to send the file to Blackbaud. A message appears, confirming your file uploaded successfully.
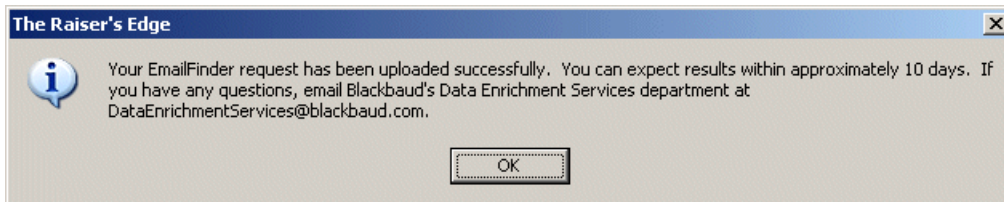
Note: If you marked the **Create Control Report** option on the General tab, the report generates before the export file is submitted.

20. Click **OK**.

Customization Options for Addresses to Check

On the Customization Options for Addresses to Check screen, select the address information to include in your export. Blackbaud uses address information to locate constituent update data.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

The program selects an address for each constituent using four steps and considers seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for a constituent, you can select an alternate address. It is important to indicate your preferences in each of the four steps so the program can select the best address for each constituent.

➢ **Completing the Customization Options for Addresses to Check screen**

On this screen, select the address information you want to include in your export.

1. In Step 1, indicate whether seasonal addresses should be included by marking the **Consider addresses with seasonal dates as of** checkbox. When you mark this checkbox, 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 01/01/2001. 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.

2. In Step 2, specify the addresses to consider if a valid seasonal address is not found in Step 1 or if you chose not to include seasonal addresses. 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, sort the address types in the order of importance. To move an address type within the **Addresses to use** box, select the address type and click the up or down arrow. For example, you can include the Preferred address and the Primary business address types by selecting 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 include the Preferred address. Because the program selects the address to update based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

3. In Step 3, you can use attributes to choose the address to include 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 export. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button, listing the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

4. In Step 4, select the address type the program should export if it cannot find an address type meeting your selections in Steps 1 through 3.

5. When you finish entering customization options, click **OK**. You return to the Create EmailFinder Export File screen.

Note: It is not necessary to include organization records when updating constituent email addresses; therefore, there is no need for the Organizations tab on the Customization Options for Addresses to Check screen.

Download Updated Information

Once Blackbaud updates the information included in your export file and makes the updated file available, the **Download Update Results** link appears in the **EmailFinder** row under the **Update Data** column.

➢ **Downloading the updated information file**

Your updated email address information is housed in a .zip file on Blackbaud's ftp site. Before you can commit the updated information to records in your database, you must first download this .zip file.

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. If the updated export file is ready, the **Download Update Results** link appears in the **EmailFinder** row under the **Update Data** column.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

2. Click **Download Update Results**. A progress bar appears, tracking the download process.

3. When the download is complete, the **Download Update Results** link changes to read **Update Data**, and the **Updated Email Report** link in the **Create Reports** column activates.

Updated Email Report

When Blackbaud updates and corrects your email information, you receive a data file containing the corrected email addresses. Before you import the new addresses into your database, you can use the **Updated Email Report** to compare the corrected email addresses with the current information in your database. The link is enabled after you download the data file from Blackbaud's ftp site. For more information, see "Download Updated Information" on page 50.

➢ **Running an Updated Email Report**

1. From the Data Health Center page, after you download the updated results, click the **Updated Email Report** link in the **Create Reports** column. The Updated Email Report screen appears, displaying the General tab.

Note: For information about downloading the updated results, see "Download Updated Information" on page 50.

2. In the **Report options** field, select how you want to view the report: **Print** or **Preview**. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

3. To create a static constituent query containing the names of all constituents included in the update, mark **Create output query**. You can then access the query file in *Query*.

4. To create a static constituent query containing the names of the constituents whose email addresses could not be updated by Blackbaud, mark the **Create exception query** checkbox. You can then access the query file in *Query*. We strongly recommend you mark this checkbox so you can research the email addresses or mark them as lost.

5. Click **Next**. A summary of the report options you selected appears.
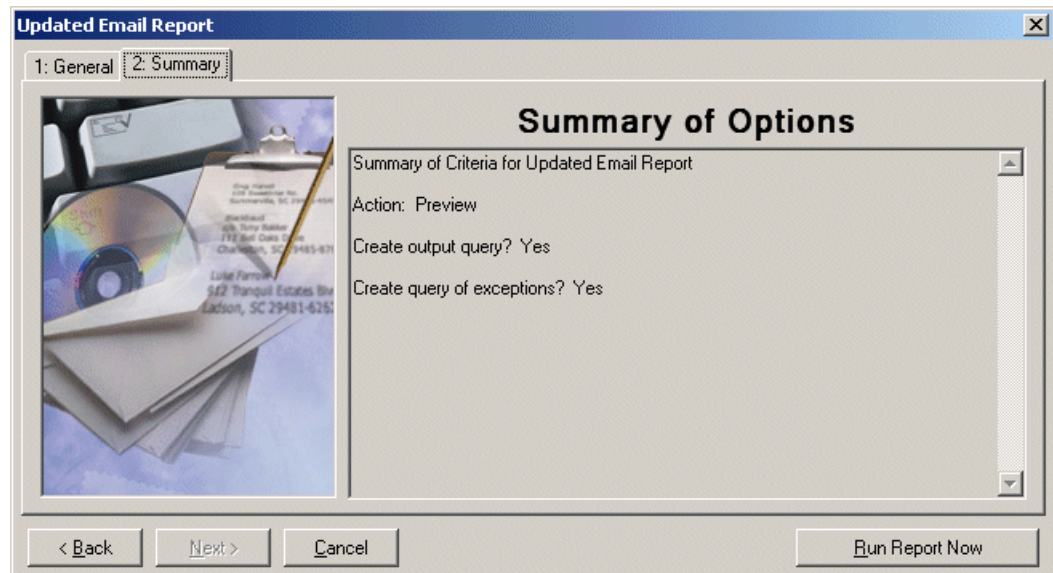
6. Click **Run Report Now** to generate the report.

> *Note:* If on the General tab you selected to create an exception or output query, a screen appears before the report is generated, asking you to name and define your query.

7. The program generates the report. If on the General tab you selected to preview the report, the report previews on your screen. You can print the preview report by clicking **Print** at the top of the preview screen. The report prints to your default printer.

   If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

8. After reviewing the updated data in the Updated Email Report, you can import the updated data into *The Raiser's Edge*. For information about importing the data, see "Updating email information" on page 54.

Update Email Information

After you download the .zip file containing your updated information and review the updates using the Updated Email Report, you can commit the information to records in your database using the **Update Data** link that appears in the **EmailFinder** row under the **Update Data** column. This link appears after you run the download. For more information about downloading the file, see "Download Updated Information" on page 50.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

➢ **Updating email information**

Before updating the data in *The Raiser's Edge*, you can review the information contained in the update file by clicking the **Updated Email Report** link. For information about running the report, see "Running an Updated Email Report" on page 52.

1. From the Data Health Center page, click the **Update Data** link in the **Update Data** column. The EmailFinder Update screen appears, displaying the General tab.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

2. Mark the **Create query of records updated** checkbox to create a static constituent query containing all constituent records included in the update.

3. Mark the **Create query of exceptions** checkbox to create a static constituent query containing the names of the constituents whose email addresses could not be updated. We strongly recommend you mark this checkbox so you can further research the email addresses or mark them as a lost.

4. In the **Save import file to** field, enter the location to which to save the import file on your hard drive. Click the ellipsis button to map to the location.

5. Click **Next**. The Processing Options tab appears.

6. In the **Processing Mode** frame select one of the following:

    • Select **Batch mode** to update all email addresses at one time. If an address cannot be updated, an exception is added to the exception query, if you chose to create one on the General tab.

    • Select **Interactive mode** to update one email address at a time. This allows you to review each address before committing it to your database.

7. In the **Reporting Options** frame, mark the **Create control report** checkbox to create a report containing information about the updated email addresses. If you mark this checkbox, select whether to **Print** or **Preview** the report. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

    The control report contains the constituent name and ID, email address, and an exception code when applicable for each constituent processed by your data correction service. The control report also includes the report date and email address correction service that updated the address.

    If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

    a. When the report appears on the screen, click the **Export** button.

    b. Select Word format and Disk File.

    c. Click **OK**.

    d. Save the file on your hard drive in a location of your choice.

    e. To view, open the document in *Word*.

Note: After updating constituent email information, you can easily change the "EmailFinder" email **Type** automatically assigned your new entries using the **Table Cleanup** utility available in *Configuration*. For more information, see the Configuration chapter of the *Security and Configuration Guide*.

8. When **EmailFinder** locates a new email address, the program saves the new address to your database and assigns it an email **Type** of EmailFinder. If another email address in your database already has this email type assigned, the program generates an exception, and the new information is not added to your database. To avoid this situation, you can enter an **Alternative Email Type**.

9. Click **Next**. The Summary tab appears, summarizing the options you selected for the update process.
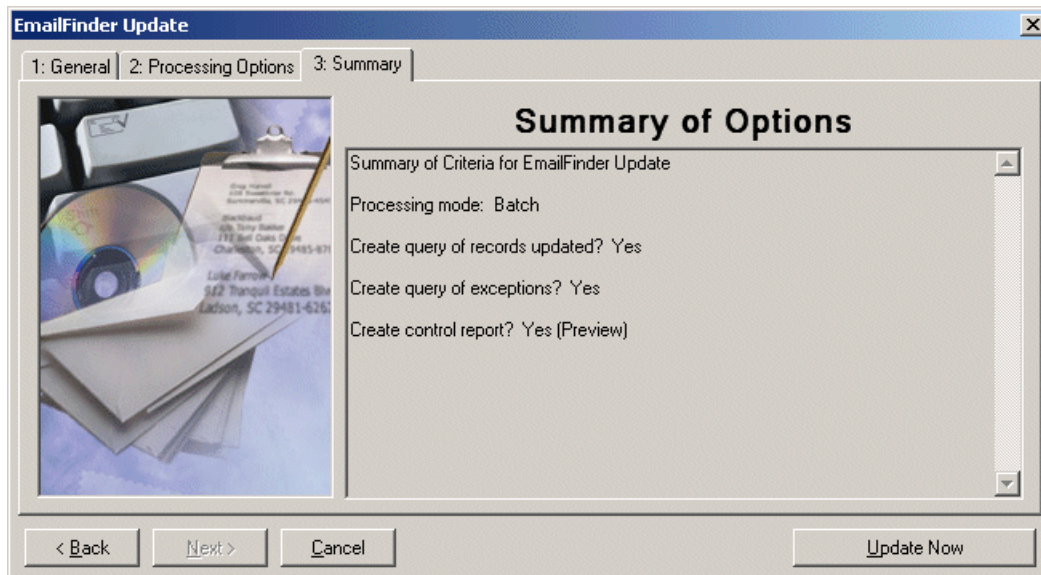
10. Click **Update Now** to update the addresses in your database.

   If on the Processing Options tab you selected the **Batch mode**, all email addresses are automatically updated.

If you selected the **Interactive mode**, the Interactive Update - EmailFinder screen appears.

Complete the following steps.

    a. In the **Append?** column, mark the checkbox next to each **Constituent Name** you want to update in your *Raiser's Edge* database.

    b. Click the **Update Now** button to update the records in your database; click **Select All** to select all the constituents listed; click **Deselect All** to unselect all the constituents listed; click **Cancel** to end the updating session.

11. After you update your information, the **Update** link on the Data Health Center page changes, displaying the date you ran the update. The link remains active, allowing you to run the update again if necessary.

PhoneFinder

Contents

Blackbaud's **PhoneFinder** provides accurate, up-to-date phone numbers for your constituent records. The utility also screens against the national Do-Not-Call registry.

Once your **PhoneFinder** subscription is activated, you can start submitting information for update using the Create PhoneFinder Export File wizard. With the wizard, you can create and submit to Blackbaud an export file containing the data you want updated. In one to two business days you receive your updated information. In a few days, we provide you an updated export file, which you can download to your database from the **Data Health Center**

Submit Data for Free Checkup

With the **Data Health Center**, you can submit data from your database to Blackbaud for a free checkup. The information you send is analyzed and missing, outdated, and incomplete information identified. For more information about using this free service, see "Free Data Checkup" on page 107.

Create and Submit Export File

To send you information to Blackbaud, you must create an export file containing the information you want updated. The Create PhoneFinder Export File wizard takes you step-by-step through this process. After you complete the export file, the **Submit File Now** button sends the data to Blackbaud.

Note: Any updates available for the **Data Health Center** automatically install when you open the health center from the Raiser's Edge bar.

> **Creating an export file and sending the file to Blackbaud**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.

Note: If you have already used **PhoneFinder** to submit data to Blackbaud, the link on the Data Health Center page reads **Submit New Data** instead of **Submit Your Data**.

Note: If you previously sent Blackbaud an export file and it has not yet been returned, a warning message appears when you attempt to submit a new export file. If you continue and submit the new export file, the previous file is canceled, and you receive results for only the new export file.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

2. On the Data Health Center page, in the **PhoneFinder** row, click **Submit Your Data**. The Create PhoneFinder Export File screen appears.

3. Click **Include** at the top of the screen to select the constituent records you want to update. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears so you can select a query containing the constituents whose information 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*.

4. When you click **Include** in the **Addresses to Check** frame you can select to include **All Addresses** or **Selected Addresses** in the update. If you select **Selected Addresses** the Customization Options for Addresses to Check screen appears, displaying an Individuals and an Organizations tab.

   The **Selected Addresses** option allows you to use your data enrichment subscription to update only the records you know are in need or updating. The number of addresses included affects the number of jobs processed. Each address counts as one record, so if you select all addresses and each constituent has four addresses, the number of records in your job is four times the number of constituents. For example, if you have 20,000 constituents, your export file has 80,000 records. That can cause you to go over the number of records allowed in the screening.

   For information about completing the tabs, see "Individuals Tab" on page 64 and "Organizations Tab" on page 66

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

5. In the **Phone Type to Use** frame, select the **Phone Type** you want to include in the export. For example, if you want to update your constituents' home phone numbers, select "Home".

6. In *The Raiser's Edge*, if a constituent's spouse is also a constituent in your database, a **Head of Household** checkbox appears on the General tab of the spouse relationship record, allowing you determine who in the relationship should be designated as the head of household. The Head of Household checkbox is often used to determine who should receive a particular mailing. On the Create PhoneFinder Export File screen, in the **'Head of Household' Processing** frame, you can choose how to handle this situation: **Export only constituents marked Head of Household**, **Export the first constituent found**, or **Export both constituents separately**.

    Head of household processing applies only if both spouses are constituents and both are selected for the export. For example, if you use a query containing a constituent who has a spouse who is also a constituent, the head of household processing is not used.

Warning: If the head of household processing does apply and in the **'Head of Household' Processing** frame you select not to **Export both constituents separately**, the information updates on only the selected constituent's record.

7. You can further refine your export criteria using the **Include these Constituents** frame. To include constituents with the **Is inactive** checkbox marked on the Bio 1 tab of their constituent record, mark **Inactive constituents**; to include constituents with the **Deceased?** checkbox marked on the Bio 1 tab of their constituent record, mark the **Deceased constituents** checkbox; to include constituents with the **Has no valid addresses** checkbox marked on the Bio 1 tab of their constituent record, mark the **Constituents with no valid address** checkbox.

8. In the **PhoneFinder Processing** frame, you can mark the following options:

    • **Verify phone numbers**: If you mark this checkbox, the program verifies the status of known phone numbers: connected or disconnected; listed or "delisted", which means the number is unlisted or not currently in service.

    • **Return 'Do Not Call' information**: If you mark this checkbox, the **DNC** column, which appears on the **Phones/Email/Links** grid on all constituent records in *The Raiser's Edge*, is marked for any phone number returned with a DNC designation. DNC stands for "Do Not Contact." On the constituent record, when you mark this column beside a phone number or email address, a visual warning appears in the column. This visual warning quickly tells you the constituent does not want to receive phone calls at the number or messages at the email address.

9. Mark **Create control report** to print a report listing the criteria selected for the export and all constituents included in the export. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

10. Mark **Create exception query** to generate an exception file at the end of your export. The file contains all fields the program did not successfully export.

11. Mark **Create output query** if you want to create a query of all records exported.

12. Click **Next**. The Contact Information tab appears.

13. Enter the name, telephone number, and email address of the individual in your organization we should contact with any questions about your data submission.

14. Click **Next**. The Summary tab appears, displaying an overview of the criteria you selected for your export file.

Note: If on the General tab you selected to create an exception and/or output query, screens appear before the export runs, asking you to name and define your queries.

15. Click **Submit File Now** to send the file to Blackbaud. A message appears, confirming your export file uploaded successfully.
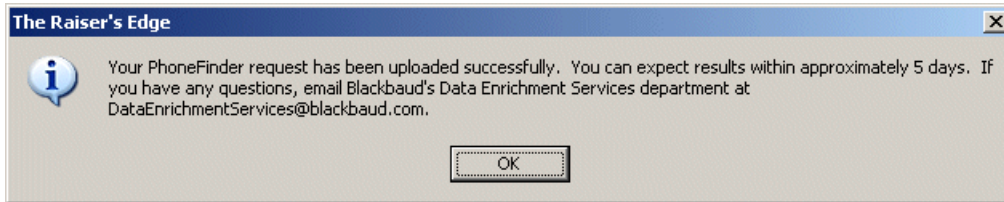
Note: If you marked the **Create Control Report** option on the General tab, the report generates before the export file is submitted.

16. Click **OK**.

Individuals Tab

On the Individuals tab of the Customization Options for Addresses to Check screen, select the address type to export for each individual constituent.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

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 export for each individual.

➢ **Completing the Individuals tab**

On the Individuals tab, you select the address type to include in your export.

1. In Step 1, you can include seasonal addresses in the export by marking the **Consider addresses with seasonal dates as of** checkbox. When you mark this checkbox, 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 01/01/2001. The date information you enter is used to determine if 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.

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. To select the address type to include, 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, sort the address types in the order of importance. To move an address type in 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 include the Preferred address. Because the program selects the address to include based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

3. In Step 3, you can use attributes to choose the address type to include 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 export. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button, listing the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

4. In Step 4, select the address type the program should include if it cannot find an address type meeting your selections in Steps 1 through 3.

5. Select the Organizations tab. For information about completing this tab, see "Organizations Tab" on page 66.

Organizations Tab

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to include for organization constituents.

The addresses of each organization constituent in the export are processed using three or four steps on the Organizations tab, depending on what you select in Step_1.

➢ **Completing the Organizations Tab**

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to include for each organization constituent.

1. In Step 1, you can choose to include the address of an organization's contact or the address of only the organization. Your selection in Step 1 affects the rest of the steps on this tab.

Warning: If you select **Print Contacts** in Step 1, each contact for an organization counts as one record. For example if you have 10,000 organization records and each organization has four contacts, your export file has 40,000 organization records. If the addresses are shared, the contact address is updated if the organization address is updated.

2. In Step 2, if you select in Step 1 to include only the organization's address, move the address types you want to include from the **Addresses** box to the **Addresses to use** box. To select the address type to include, 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, sort the address types in the order of importance. To move an address type in 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 include the Preferred address. Because the program selects the address to include based on its position in the **Addresses to use** box, 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, you must complete the following steps.

a. You can specify the contact types you want to include by clicking **Contact Information**. 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** list and click the single right arrow to move it to the **Contact types to include** list.

c. If you list multiple contact types in the **Contact types to include** list, sort the contact types in the order of importance. To move a contact type in the **Contact types to include** list, highlight the contact type and click the up or down arrow as necessary.

d. You can also filter the contacts included based on attributes entered on their constituent records by clicking the **Contact Attributes** button. The Contact Attributes to Consider screen appears. On this screen, in the **Filter** column, select to Include or Exclude the contact based on the selected attributes. Next, select the address attribute **Category** and **Description** on which to base this attribute filter. Click **OK** to close the Contact Attributes to consider screen.

e. Mark the **Print contact name** checkbox to include the contact name with the address.

f. 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>.

g. If you selected in Step 1 to **Print contacts**, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button in Step 2. When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.

h. 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. 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>.

Note: For information about entering attributes in ***The Raiser's Edge***, see the *Constituent Data Entry Guide*.

3. If you select in Step 1 to include only the organization's address, in Step 3 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 include addresses with the attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. 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.

4. If you select in Step 1 to **Print only the organization**, Step 4 appears. In Step 4, 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.

5. Click **OK** to return to the Create PhoneFinder Export File.

Download New Phone Information

Once Blackbaud updates the information included in your export file and makes the updated file available, the **Download Update Results** link appears in the **PhoneFinder** row under the **Update Data** column.

➢ **Downloading the updated information file**

Your updated phone information is housed in a .zip file on Blackbaud's ftp site. Before you can commit the updated information to records in your database, you must first download this .zip file.

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. If the updated phone file is ready, the **Download Update Results** link appears in the **PhoneFinder** row under the **Update Data** column.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

2. Click **Download Update Results**. A progress bar appears, tracking the download process.

3. When the download is complete, the **Download Update Results** link changes to read **Update Data**, and the **Updated Phone Report** link in the **Create Reports** column activates.

Updated Phone Report

When Blackbaud updates and corrects your phone information, you receive a data file containing the corrected numbers. Before you import the new information into your database, you can use the **Updated Phone Report** to compare the corrected numbers with the current information in your database. The link is enabled after you download the data file from Blackbaud's ftp site. For more information, see "Download New Phone Information" on page 70

➢ **Running an Updated Phone Report**

1. From the Data Health Center page, after you download the updated results, click the **Updated Phone Report** link in the **Create Reports** column. The Update Phone Report screen appears, displaying the General tab.

Note: For information about downloading the updated results, see "Update Phone Information" on page 72.

2. In the **Report options** field, select how you want to view the report: **Print** or **Preview** on your computer screen. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

3. To create a static constituent query containing the names of all constituents included in the update, mark **Create output query**. You can then access the query file in *Query*.

4. To create a static constituent query containing the names of the constituents whose information could not be updated by Blackbaud, mark the **Create query of exceptions** checkbox. You can then access the query file in *Query*. We strongly recommend you mark this checkbox so you can research the results.

5. Click **Next**. A summary of the report options you selected appears.
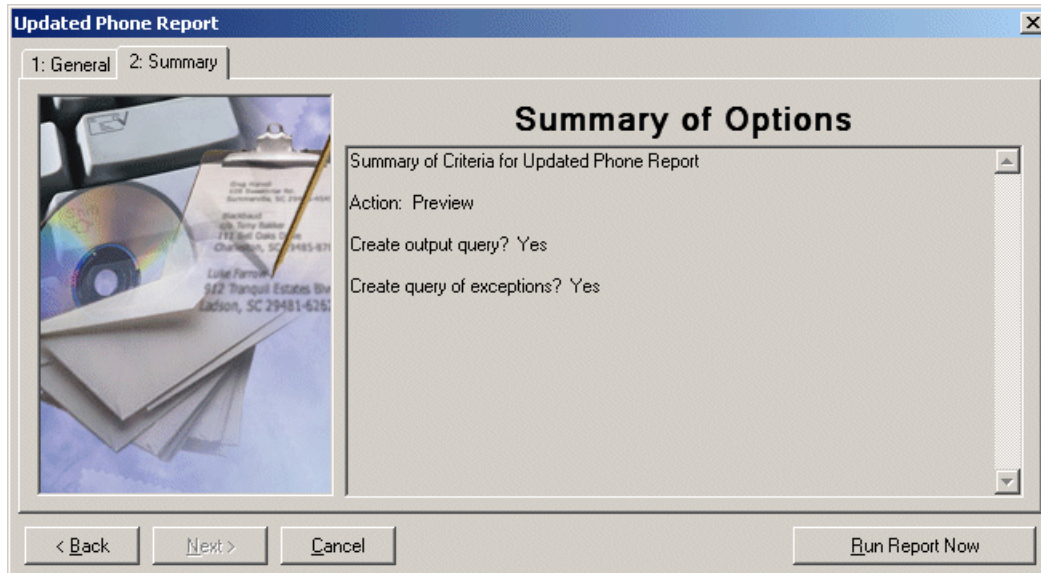
6. Click **Run Report Now** to generate the report.

Note: If on the General tab you selected to create a static query, a screen appears before the report is generated, asking you to name and define your query.

7. The program generates the report. If on the General tab you selected to preview the report, the report previews on your screen. You can print the preview report by clicking **Print** at the top of the preview screen. The report prints to your default printer.

If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

8. After reviewing the updated data in the Updated Phone Report, you can import the updated data into ***The Raiser's Edge***. For information about importing the data, see "Updating phone information" on page 73.

Update Phone Information

After you download the .zip file containing your updated information and review the updates using the Updated Phone Report, you can commit the information to records in your database using the **Update Data** link that appears in the **PhoneFinder** row under the **Update Data** column. This link appears after you run the download. For more information about downloading the file, see "Download New Phone Information" on page 70.

Note: If for some reason, Blackbaud sends you a response file using means other than the **Data Health Center** (i.e., a CD or email), click the **Manual Data Return** link that appears under Awaiting Update Results in the **Update Data** column. A screen appears with instructions on how to handle a manual data return.

➢ **Updating phone information**

Before updating the data in *The Raiser's Edge*, you can review the information contained in the update file by clicking the **Updated Phone Report** link. For information about running the report, see "Running an Updated Phone Report" on page 71.

1. From the Data Health Center page, click the **Update Data** link in the **Update Data** column. The PhoneFinder Update screen appears, displaying the General tab.

2. Mark the **Create query of records updated** checkbox to create a static constituent query containing all constituent records included in the update.

3. Mark the **Create query of exceptions** checkbox to create a static constituent query containing the names of the constituents whose information could not be updated. We strongly recommend you mark this checkbox so you can research the issue or mark them as a lost.

4. In the **Save import file to** field, enter the location on your hard drive to which you want to save the import file. Click the ellipsis button to map to the location.

5. Click **Next**. The Processing Options tab appears.
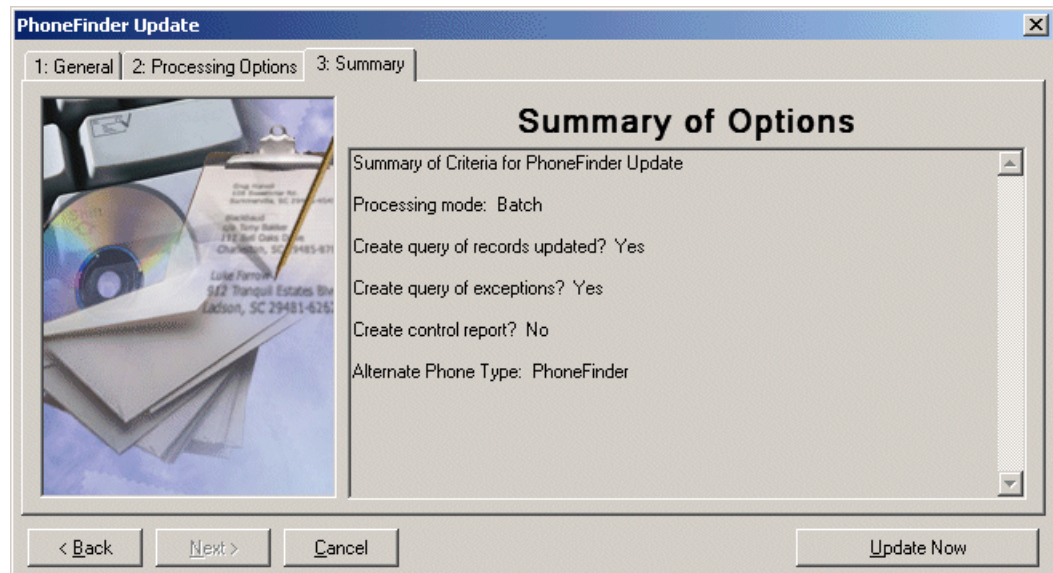
6. In the **Processing Mode** frame select one of the following:

   • Select **Batch mode** if you want the program to update all the phone information at one time. For any information the program fails to update an exception is added to the exception query, if you chose to create one on the General tab.

   • Select **Interactive mode** if you want to update phone information one record at a time. This allows you to review each entry before committing it to your database.

7. In the **Reporting Options** frame, mark the **Create Control Report** checkbox to create a report containing information about the updated records. If you mark this checkbox, select whether to **Print** or **Preview** the report. We recommend previewing the report on your screen before printing. In many cases, the report is very long.

   If you selected to preview the report, when the previewed report appears on the screen, we recommend you export the report as a Microsoft *Word* document and save the report for future reference.

   a. When the report appears on the screen, click the **Export** button.

   b. Select Word format and Disk File.

   c. Click **OK**.

   d. Save the file on your hard drive in a location of your choice.

   e. To view, open the document in *Word*.

8. When the program attempts to update a record with a new phone number, it assigns the number a **Phone Type** of "New". If the **Phone Type** "New" has been applied to another number on the constituent record, in the **Alternate Phone Type** field, enter the alternate **Phone Type** you want used. If the program encounters this situation and an **Alternate Phone Type** is not assigned, an exception is generated.

9. Click **Next**. The Summary tab appears, summarizing your update options.
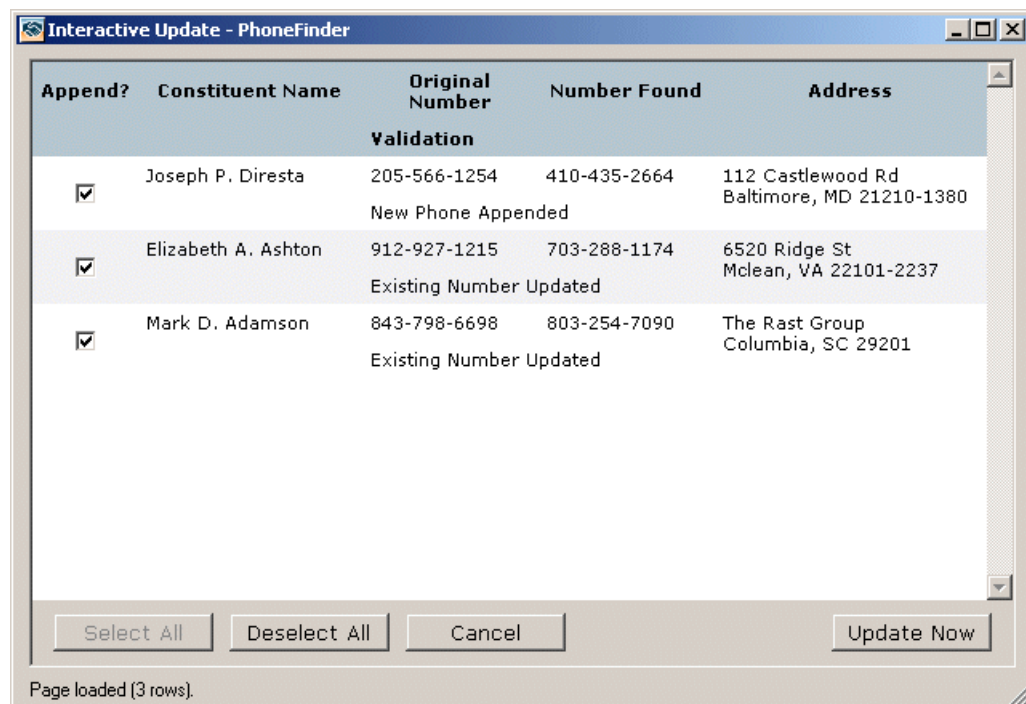
10. Click **Update Now** to update the information in your database.

Note: If on the General tab you selected to create an exception query, a screen appears before the update runs, asking you to name and define your query.

If on the Processing Options tab you selected the **Batch mode**, all phone information is automatically updated.

If you selected the **Interactive mode**, the Interactive Update - PhoneFinder screen appears.

Complete the following steps.

a. Compare the information in the **Original Number** column against that in the **Number Found** column and confirm you want accept the suggested update. The **Validation** distinctions are:

New Phone Appended: No **Original Number** existed on the constituent record, but a new phone number was located.

Existing Number Updated: Phone information different from that currently entered on the constituent record was located.

Current Number Verified: The information currently entered on the constituent record was verified as correct.

b. In the **Append ?** column, mark the checkbox next to each **Constituent Name** you want to update in your *Raiser's Edge* database.

Note: After you update your information, the **Update** link on the Data Health Center page changes, displaying the update date. The link remains active, allowing you to run the update again if necessary.

c. Click the **Update Now** button to update the records in your database; click **Select All** to select all the constituents listed; click **Deselect All** to unselect all the constituents listed; click **Cancel** to end the updating session.

Address Accelerator

In this chapter

The address correction service **AddressAccelerator** updates and CASS-certifies addresses in your database to ensure your mailings reach the intended recipients. **AddressAccelerator** includes the following functions:

Note: **AddressAccelerator** provides CASS certification through Satori Software, Inc., an official CASS certification agent.

• Updates addresses with missing or misspelled information

• Corrects missing or incorrect 5-digit ZIP Codes

• Adds ZIP+4 codes to an address

• Adds carrier route codes and delivery point codes

• Standardizes street addresses

• Updates either an entire mailing list or verifies a single address

• Automatically CASS certifies addresses you correct, qualifying you for postal discounts on mailings

Note: With **PostalSaver**, you can CASS certify addresses in your database through the PostalSaver tab in Mail, qualifying you for even further postal discounts on mailings. For more information about this feature, see the PostalSaver chapter in the *Mail Guide*.

The CASS certification you receive from your address correction service is valid for 180 days.

Footnote Flags

When addresses are processed and updated by **AddressAccelerator**, certain footnote flags are assigned to addresses that create exceptions, displaying 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 ZIP Code that could not be found. Because the city and ZIP Code were not found, an exception is created to alert you that a problem exists. The following footnote flags are used when you use **AddressAccelerator** as your address correction service.

Footnote Flag	Meaning
A	Could not parse a City, State or ZIP from input data.
B	State found but no such City or ZIP exists.
C	Could not parse a City name and no such ZIP exists.
D	Could not parse a ZIP and no such City exists.
E	City and ZIP Code were not found.
F	City and ZIP Code were not found.
G	Address line does not contain a valid primary name.
H	Invalid Address.
I	Address Line Blank.
J	The street name was not found.
K	Similar street names found but with no exact matches.
L	House, Apartment, Box or Suite number is out of range.
M	No such predirectional or a predirectional is needed.
N	No such suffix or a suffix is needed.
O	Multiple addresses were found with different ZIP+4 codes.
P	No such post directional or a post directional is needed.
Q	ZIP Code needed to pick between multiple responses.

Update AddressAccelerator

Periodically, you can download files from our Web site that contain address information used to correct and CASS certify your mailing addresses. The files contain every deliverable mailing address in the United States. The CASS certification is valid for 180 days. You can use the downloaded files to CASS certify the addresses in your database as often as necessary.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

Before running **AddressAccelerator**, we suggest you confirm you have the most up-to-date version of the service by clicking the **Download Latest Update** link.

If you have not purchased **AddressAccelerator**, the **Download Latest Update** link does not appear. Contact Blackbaud to arrange the purchase.

Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

➢ **Updating AddressAccelerator**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.

2. At the bottom of the Data Health Center page, click **Download Latest Update**.

Note: The **Download Latest Update** link is enabled only if the downloading computer has a valid path to the **AddressAccelerator** files entered on the File Locations tab in User Options. If this path is to your CD drive, the CD must be in the drive in order for the link to activate. If the downloaded files are located somewhere other than the location entered in User Options, the D**ownload Latest Update** link is disabled.

After you click the **Download Latest Update**, the Web browser opens, displaying the **AddressAccelerator** section of the Blackbaud Downloads page.
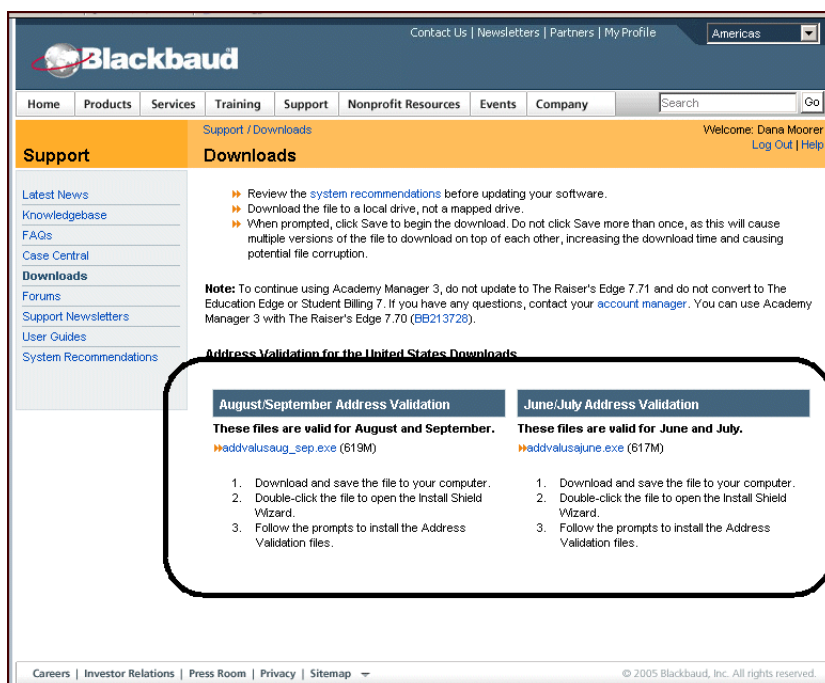
Warning: Previous versions of the program must be removed before you install the update. To uninstall older versions, when you run the update, click **OK** in the window explaining you should uninstall **AddressAccelerator**. Then, click **Yes** in the next window, asking if you would like to proceed. If you do not uninstall older versions, error messages appear when you try to open the program.

3. Download and install any relevant updates. Download and installation instructions are included on this Web page. Read all **Notes** included with the download instructions.

4. After you install **AddressAccelerator** data files on a workstation or server for the first time, install the Satori *MailRoom ToolKit* update files. If you install the **AddressAccelerator** data files on a server, you must install the toolkit update files on each workstation that uses **AddressAccelerator**. For a procedure on how to install the *MailRoom ToolKit* update files, see "Mailroom Toolkit" on page 81.

5. Log into *The Raiser's Edge*.

6. On the menu bar, select **Tools**, **User Options**. The Options screen appears.

7. Select the File Locations tab.

8. On the **AddressAccelerator Data Files** row of the grid, click in the **Location** column. An ellipsis appears.

9. Enter the path to the **AddressAccelerator** data files.

   To map to the location, click the ellipsis. The Browse for Folder screen appears so you can locate the data files. When you locate the files, select the folder and click **OK**. You return to the File Locations tab, and the selected location appears in the **AddressAccelerator Data Files** row.

10. Click **Apply**.

11. Click **OK**. You return to the shell page of *The Raiser's Edge*.

If this is the first time you installed the **AddressAccelerator** data files on your workstation or server, you must now install the Satori *MailRoom ToolKit* update files. For installation instructions, see "Mailroom Toolkit" on page 81.

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 CASS certification files (see "Updating AddressAccelerator" on page 79), browse to the installation location (for example, C:\Program Files\Address Validation Datafiles).

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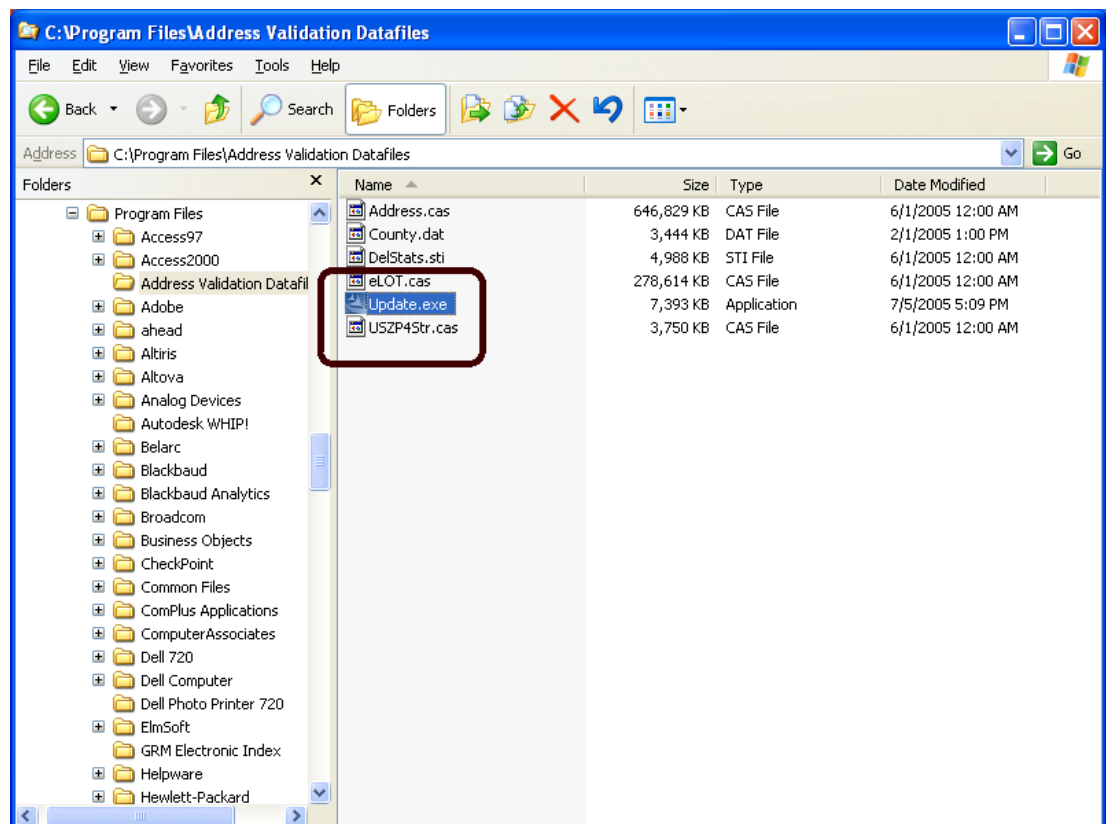
The MailRoom ToolKit Update Setup screen appears.
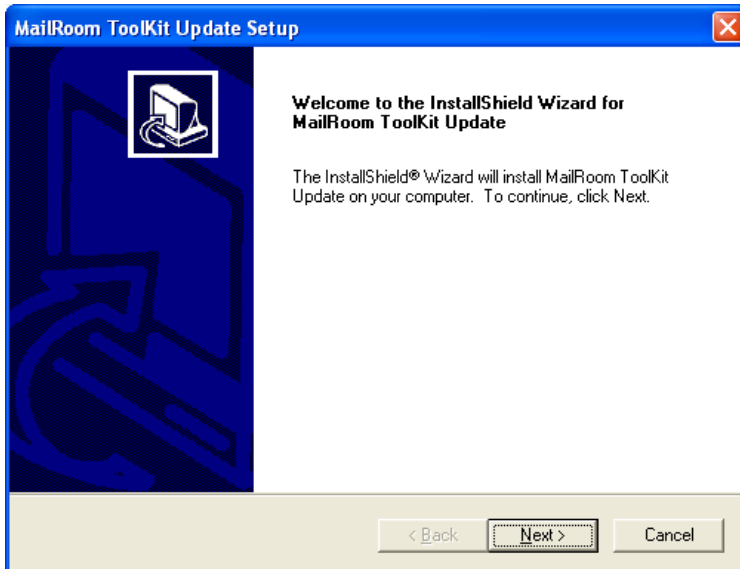
3. Click **Next**. The Chose Destination Location screen appears, asking you to select the location in which you want the software installed. The default location appears in the **Destination Folder** frame. Click the **Browse** button to access the Choose folder screen and map to a different location.
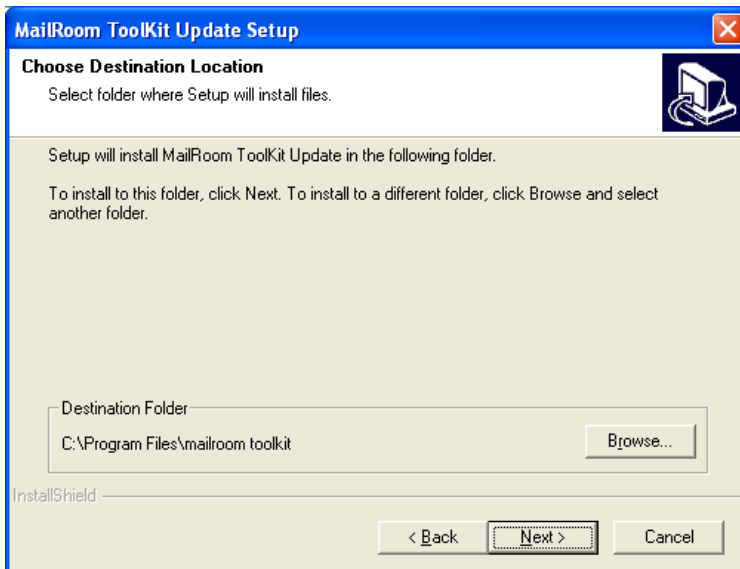
4. Click **Next**. A progress bar tracks the installation process.
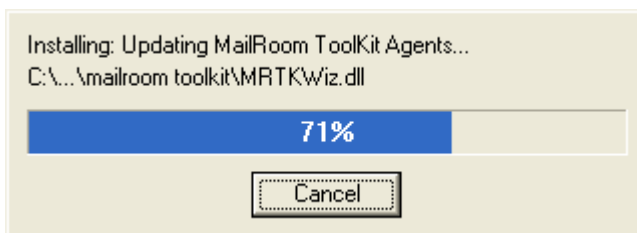
A final screen appears, confirming the installation is complete.
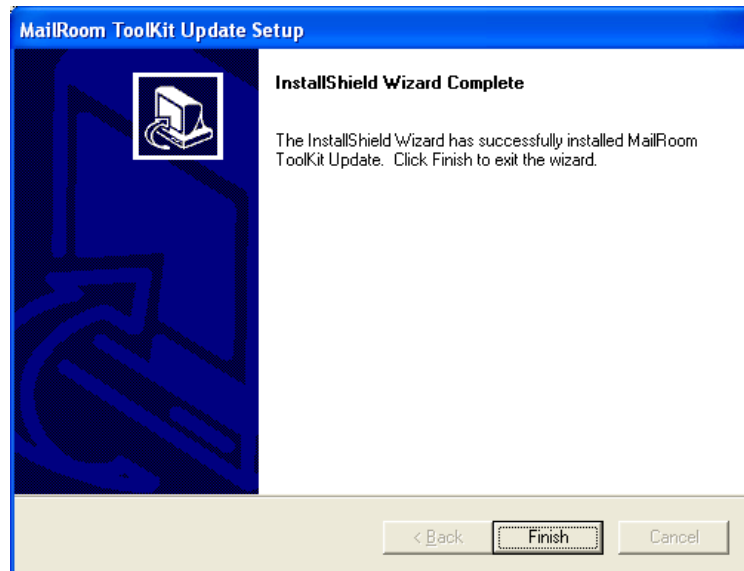
5. Click **Finish**.

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

Updated Address Report

Before you begin to certify addresses, you can use the Updated Address Report to identify potential problems that may prevent an address from updating.

Warning: The Updated Address Report checks only US-formatted addresses. For addresses with anything other than United States selected in the **Country** field on the constituent record in your database, no exceptions generate when you run the report.

This pre-screening report identifies addresses that do not meet standard address formatting. For example, addresses with more than 31 characters entered in the **City** field are excluded from the update because that is the length limit for the field. If the city name is entered incorrectly as "North Charleston, South Carolina", the address appears in the report because this exceeds the field character limit. After you print an Updated Address Report, you can manually correct any problematic address information before you run the address update. The following table contains the criteria used to include addresses in the report.

Processing Exceptions
More than two address lines
More than 31 characters in City name
More than 95 characters in Address Line 1
More than 127 characters in Address Line 2

Note: For more information about address formatting requirements, see the US Postal Service publication Pub. 28, Postal Addressing Standards. To receive this guide, contact your nearest Postal Business Center or the National Customer Support Center at 1-800-238-3150, or visit the USPS Web site at www.usps.com.

The Updated Address Report contains the constituent name and ID, current address, and address type for each address included in the report. If the address creates an exception, the exception code appears as a letter in the **Exception** column on the report. The explanations of the exception codes appear at the bottom of the report.

➢ **Running an Updated Address Report**

1. From the Data Health Center page, in the **AddressAccelerator** row, click the **Updated Address Report** link. The Update Address Report screen appears, displaying the General tab.

2. Click **Include** at the top of the screen to select the constituents whose addresses you want to update. You can include **All Records**, **Selected Records**, or **One Record**. If you select **One Record**, a screen appears on which you can locate the record you want to update. If you choose **Selected Records**, the Open Query screen appears, so you can select the query containing the constituent records 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*.

   Warning: If you include selected address types, only certain address types are updated on each constituent record processed by your data correction service. When you include all address types, every address type is updated on each constituent record processed.

3. When you click **Include** in the **Addresses to Certify** frame you can select to include **All Addresses** or **Selected Addresses** in the update. If you select **Selected Addresses** the Customization Options for Addresses to Check screen appears, displaying an Individuals and an Organizations tab. For information about completing these tabs, see "Individuals Tab" on page 86 and "Organizations Tab" on page 88.

4. Also in the **Address to Certify** frame, select the time period you want to use to determine whether the program should certify an address. You can certify addresses regardless of the date last certified (**Regardless of when last certified**), certify addresses **Not certified using the current subscription data**, or certify addresses **Not certified using the previous subscription data**.

Note: If you are certifying addresses for constituents in a query, the constituents are processed using the order in which the records appear in the query.

5. In the **Report options** field, you can select to **Print** or **Preview** the report.

6. To create a static constituent query containing the names of the constituents whose addresses cannot be certified, mark the **Create exception query** checkbox.

7. Click **Next**. The Format tab appears. Your settings on the Format tab determine the appearance of your report.

8. On the Format tab, select the following:

   a. From the **Headings** category, enter report title and alignment information. You can also choose to include page numbers and the report date in the heading and to include the heading information on every page of the report.

   b. From the **Criteria** category, you can print your report parameter settings with the report. This helps you remember the data you used to create the report. To enable the frame, mark the **Print Report Criteria** checkbox. In the **Criteria to print** box, mark all the criteria you want to print with your report. Unmark any information you do not want to print with your report. Specify where the program should print this information in the **Include on** field at the bottom of the screen. You can choose to print the criteria on **A separate page** or the **First page of the report**. If you select **A separate page**, the criteria prints at the end of your report.

   c. The **Detail** category includes just that, details about the information you want to print with your report. In the **Include** frame, you can select to include **Changed Addresses**, **Exceptions**, or **Both**. Select how you want capitalization handled on the report in the **Address Capitalization** frame.

d. Use **Page Footer** to create a footer to appear at the bottom of every page in the report. You can also select to print the page number or the date in the footer of each page, instead of in the heading.

e. Use **Report Footer** to include a footer that appears only on the last page of the report. For example, if you choose to print the report criteria on a separate page with your report, you may want to mark where the report data ends. Readers then know the information contained in the last page(s) is not part of the official report.

f. Use **Color Scheme** to select colors for report headings. If you leave the **Apply a Color Scheme** checkbox unmarked, the report prints in black and white.

9. Click **Next**. The Summary tab appears, displaying an overview of your report options.
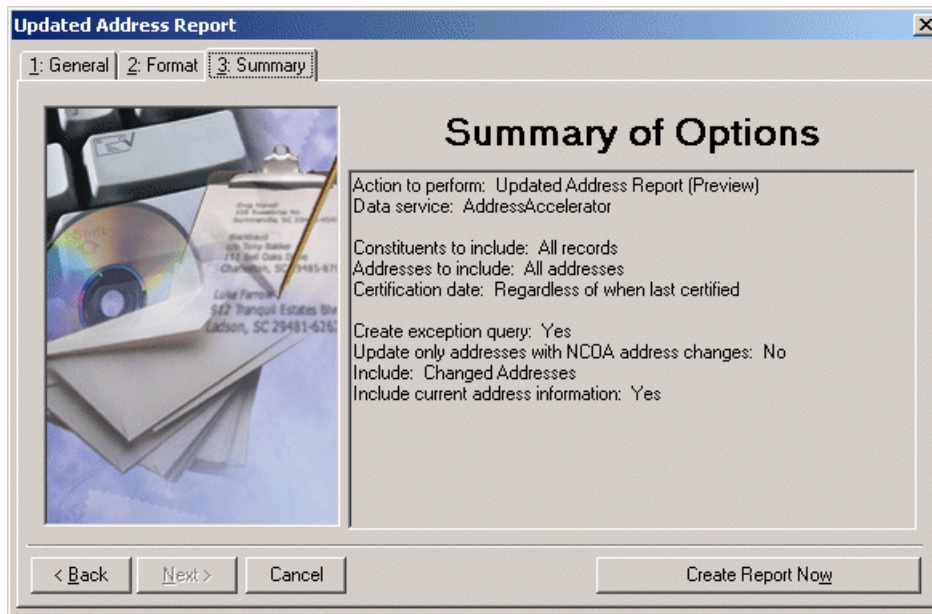
Note: If on the General tab you selected to create an exception query, a screen appears before the report runs, asking you to name and define your query.

10. Click **Create Report Now** to generate the report.

Individuals Tab

On the Individuals tab of the Customization Options for Addresses to Check screen, 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.

➢ **Completing the Individuals tab**

1. On the Individuals tab, you select the address type to update for each individual constituent.

2. 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, 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 01/01/2001. 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.

3. 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, sort the address types in the order of importance. To move an address type in 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, use the arrows to move the Preferred address to the top of the list.

4. 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.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

For example, to update addresses with the attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. 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>.

5. 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 Address tab on a constituent record, the primary business address, the primary spouse business address, or all user defined address types.

6. Select the Organizations tab. For information about completing this tab, see "Organizations Tab" on page 88.

Organizations Tab

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to update for organization constituents.

The addresses of each organization constituent in the mailing list are processed using three or four steps on the Organizations tab, depending on what you select in Step 1.

➢ **Completing the Organizations Tab**

1. On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to update for each organization constituent.

2. In Step 1, indicate whether to update the address of an organization's contact by selecting **Print Contacts** or only the address of the organization, by selecting **Print Only the organization**. Your selection in Step 1 affects the rest of the steps on this tab.

3. In 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, sort the address types in the order of importance. To move an address type in 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, 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, you must complete the following steps.

a. You can specify the contact types you want to include by clicking **Contact Information**. 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** list and click the single right arrow to move it to the **Contact types to include** list.

c. If you list multiple contact types in the **Contact types to include** list, sort the contact types in the order of importance. To move a contact type in the **Contact types to include** list, 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 by highlighting them in the Contact types list and clicking the single right arrow to move them to the **Contact types to include** list. 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** list, use the arrows to move the Matching Gift Coordinator to the beginning of the list.

d. You can also filter the contacts included based on attributes entered on their constituent records by clicking the **Contact Attributes** button. The Contact Attributes to Consider screen appears. On this screen, in the **Filter** column, select to Include or Exclude the contact based on the selected attributes. Next, select the address attribute **Category** and **Description** on which to base this attribute filter based.

e. Mark the **Print contact name** checkbox to include the contact name with the address.

f. 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>.

g. If you selected in Step 1 to **Print contacts**, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button in Step 2. When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.

h. 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. 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>.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

4. 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. 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.

5. If you select in Step 1 to **Print only the organization**, Step 4 appears. In Step 4, 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.

6. Click **OK** to return to the Create AddressFinder Export File.

Validate Address Information

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 the **Interactive mode** or as a group using the **Batch mode**. The following procedure covers both options.

➢ **Validating address information**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.
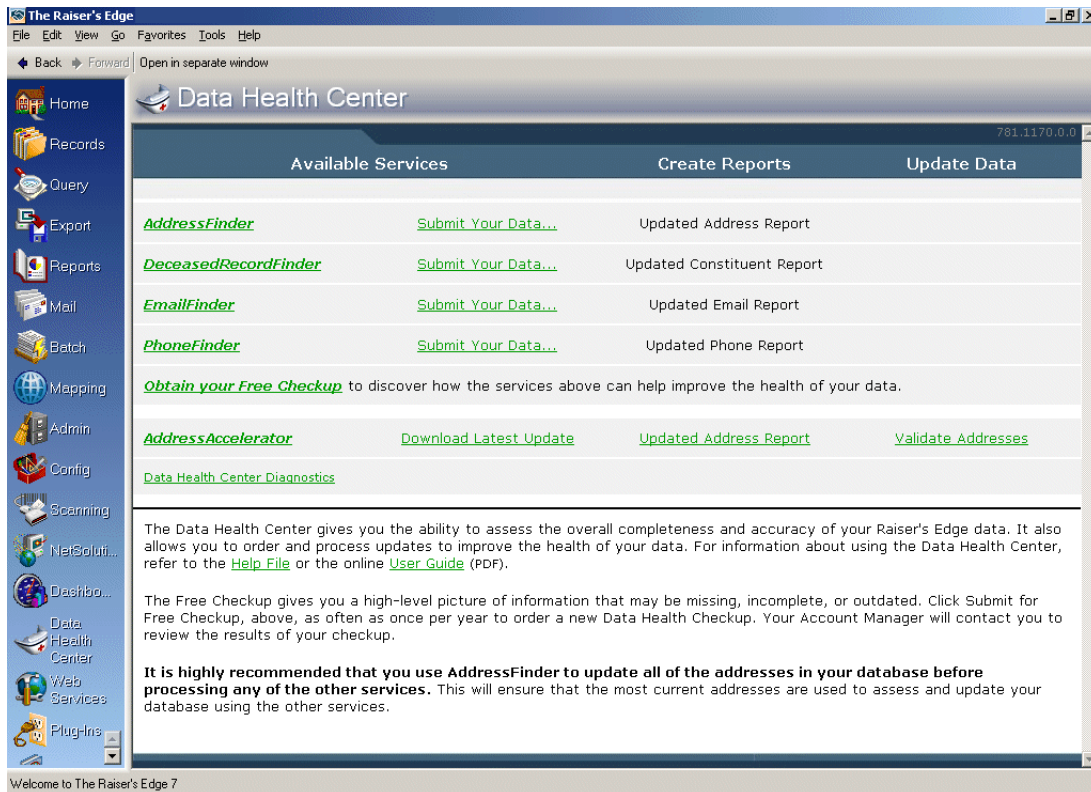
Warning: Be sure you have a good backup of your system and all other users are logged out before you begin updating addresses.

2. On the Data Health Center page, in the **AddressAccelerator** row, click **Validate Address**. The Update Addresses screen appears, displaying the General tab.

Note: Because all **Data Health Center** services are based on constituent address information, it is important you have the most up-to-date address information available before running updates. Therefore, we recommend you run an **AddressFinder** update before running any other **Data Health Center** utility.

3. Click **Include** at the top of the screen to select the constituents whose addresses you want to update. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears, so you can select the query containing the constituent records 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*.

4. When you click **Include** in the **Addresses to Certify** frame you can select to include **All Addresses** or **Selected Addresses** in the update. If you select **Selected Addresses** the Customization Options for Addresses to Check screen appears, displaying an Individuals and an Organizations tab. For information about completing these tabs, see "Individuals Tab" on page 86 and "Organizations Tab" on page 88.

Warning: If you include selected address types, only certain address types are updated on each constituent record processed by your data correction service. When you include all address types, every address type is updated on each constituent record processed.

5. Also in the **Address to Certify** frame, select the time period you want to use to determine whether the program should certify an address. You can certify addresses regardless of the date last certified (**Regardless of when last certified**), certify addresses **Not certified using the current subscription data**, or certify addresses **Not certified using the previous subscription data**.

6. To create a static constituent query containing the names of the constituents whose addresses cannot be certified, mark the **Create exception query** checkbox.

Note: If you are certifying addresses for constituents in a query, the constituents are processed using the order in which the records appear in the query.

7. Click **Next**. The Process Options tab appears.

8. In the **Processing Mode** frame select one of the following:

   • Select **Batch mode** if you want the program to update all the addresses at one time. If an address cannot be updated, an exception query is created.

   • Select **Interactive mode** if you want to update one address at a time. This allows you to review each address before committing it to your database.

9. In the **Address Capitalization** frame, choose whether to capitalize the entire address or use proper case. When you choose **Proper case address**, your data correction service 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 US Postal Service. For more information about address formatting requirements, see the US Postal Service publication #28, Postal Addressing Standards. To receive this guide or more information about postal discounts, contact your nearest Postal Business Center or the National Customer Support Center at 1-800-238-3150, or visit the USPS Web site at www.usps.com.

10. In the **Reporting Options** frame, select the following:

- Mark the **Print form 3553** checkbox to print the CASS Summary Report (Form 3553) to confirm the addresses are CASS certified.

- 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. The control report contains the constituent name and ID, address and type, and an exception code where applicable for each constituent processed by your data correction service. The control report also includes the report date and address correction service that updated the address.

11. 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 fields in this frame blank if you do not want to update the information for an address on the constituent record.

    The **Date from** field defaults to today's date, and for new addresses, leave the **Date to** field blank.

12. If you want to save the original address on the Address 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. The **Date to** field defaults to today's date.

    You can leave 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.

13. Click **Next**. The Footnotes tab appears. On the Footnotes tab, you can specify the footnote flags you want to add as address attributes. Different address correction services use different footnote flags. For an exact list, see "Footnote Flags" on page 78.

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

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

15. 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 01/01/2001.

16. 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 01/01/2001."

17. Click **Next**. The Summary tab appears, displaying an overview of your address validation options.

18. Click **Update Now** to update the addresses in your database.

> *Note:* Addresses formatted differently than the standard format for the version of *The Raiser's Edge* you are using are included in processing, but "fail" the first test and are not considered for further processing against the exception rules. For example, if you are using the US version of the program, only U.S.-formatted addresses can be reviewed. Foreign addresses will have to be reviewed individually.

If on the Process Options tab you selected the **Batch mode**, all addresses are automatically updated.

If you selected the **Interactive mode**, the Address Validation screen appears.

Complete the following steps.

a. The **Current Address Information** frame displays the constituent address information as it currently appears in your database.

b. Mark the **Add footnote as an address attribute** checkbox to copy a footnote flag to the constituent record as an address attribute. If you cannot certify an address, footnote flags indicate the reason the address cannot be certified. The footnote flag appears as an address attribute with the **Category** of NCOA Footnote and a **Description** of the footnote flag.

c. The field below the **Add footnote as an address attribute** checkbox displays the reason the address cannot be certified. For example, "Multiple possible matches with similar street names were found but with no exact matches". 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.

d. 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.

e. 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 01/01/2003".

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

g. Click the **Update Address** button to update the current address in your database with the new certified address; click the **Skip** button to skip the address; click the **Auto** button to change from **Interactive mode** to **Batch mode**; click **Cancel** to end the updating addresses session.

Credit Card Updater

Contents

To help keep credit card data accurate in *The Raiser's Edge*, you can run Credit Card Updater, available with *Blackbaud Merchant Services*. Credit Card Updater uses Visa *Account Updater*, MasterCard *Automatic Billing Updater*, Discover *Network Account Updater*, and American Express *Cardrefresher* to identify expired or out-of-date credit card information, and provide new card numbers and expiration dates as necessary.

Prepare to Use Credit Card Updater

Before you begin to use Credit Card Updater, you should ensure your credit card data is in a good, up-to-date state. Here are some tips to prepare.

• Update the status on old recurring gifts and pledges no longer in use.

  This ensures that old information does not get picked up for update by Credit Card Updater. To update old recurring gifts and pledges, we recommend you run the Past Due Report in **Pledge and Recurring Gift Reports** to find all recurring gifts or pledges that have not had a payment in the last three years. Choose to create both a constituent and gift output query from the report. This will identify potentially expired information. You can then go to the Bio 2 or Org 2 tab of the constituent record and remove those credit cards from your database by deleting them.

  Review the gift output query you created when you ran the report, and mark any pledges and recurring gifts as Terminated so associated credit cards will not be pulled into the next run of Credit Card Updater.

Credit Card Updater Process

To update credit card information, you must run Credit Card Updater in the **Data Health Center**. When you run Credit Card Updater, credit card information in your database is sent to *Blackbaud Merchant Services*, where each card is registered for update. When a card is registered for update, it is flagged with *Blackbaud Merchant Services* to be checked for new information each time the process is run. Only cards that have been registered will be updated. Each time you run the process, all new cards are registered, and all cards that are already registered are checked for updated information.

Note: All credit cards stored on the Bio 2 or Org 2 tab of the constituent record, credit cards on recurring gifts and pledges with a gift status of Active or Held, and all credit cards on recurring gifts and pledges that are in gift batches with a gift status of Active or Held are sent for registration when you run the Credit Card Updater process.

Blackbaud Merchant Services partners Visa *Account Updater*, MasterCard *Automatic Billing Updater*, Discover *Network Account Updater*, and American Express *Cardrefresher* to verify credit card information, and provide new information where necessary, such as new card numbers and expiration dates.

Note: No credit card information will be updated the first time you run the process, as no credit cards have been registered yet. *Blackbaud Merchant Services* sends the information you submitted to be updated once a month, so we recommend you run the Credit Card Updater process on a monthly basis.

➢ **Run Credit Card Updater process**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All available health center services appear.

2. On the Data Health Center page, in the **Credit Card Updater** row, click **Update Credit Cards**. The Credit Card Updater screen appears.
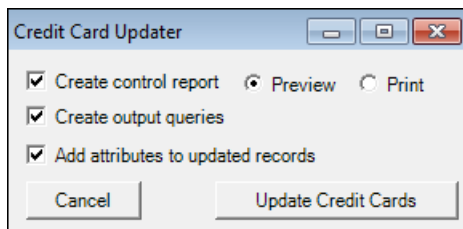
3. Select whether to create a control report of the results of the Credit Card Updater process, output queries of the credit cards that were updated, and if you would like to add attributes to the updated records.

   If you select to add attributes to updated records, a Credit Card Updater attribute is created on the Attributes tab of the constituent record, as well as the Attributes tab of the gift record for active and held recurring gifts and pledges.

   We recommend you select to create both output queries and attributes.

4. Click **Update Credit Cards**.

5. When the process is finished, a confirmation message appears to tell you how many credit cards were registered for future updates, and how many cards were de-registered because the information was no longer valid, or the card has been deleted from *The Raiser's Edge* since the last time you ran Credit Card Updater.

Understanding Credit Card Updater for Monthly Management

It is important that you understand what happens when you run the Credit Card Updater process, and the results of your monthly runs.

What Happens When I Run Credit Card Updater?

When you run the Credit Card Updater process, three things happen:

- Records are updated in the database for any credit cards that were previously registered by Credit Card Updater and have an update in *BBMS* available, such as a new expiration date.
- Any new credit cards added to your database since the last Credit Card Updater run are registered so they can be checked for updates the following month when you run Credit Card Updater again.
- Any credit cards that should not be used anymore, such as cards associated with completed pledges, are de-registered so they are not picked up the next time you run Credit Card Updater. Credit cards that may have been deleted from *The Raiser's Edge* since the last time you ran the process are also de-registered.

Note: Even if you do not run the Credit Card Updater process in *The Raiser's Edge* each month, *Blackbaud Merchant Services* still uses any new credit card information to process transactions.

What Records or Cards Get Picked Up in a Run of Credit Card Updater?

When you run Credit Card Updater, only qualified records are picked up by the process. These records include:

- Credit cards stored on the Bio 2 or Org 2 tabs of the constituent record
- Credit cards on recurring gifts and pledges with a status of Active or Held, as single gifts or in batches
- Credit cards on gifts in recurring batches

Note: Credit Card Updater picks up credit cards on Pay-Cash gifts and recurring gifts or pledges with a status of Completed or Terminated only when they also appear on qualified records listed above. Credit Card Updater does *not* pick up credit cards in deleted batches and committed batches that are not recurring.

Reporting and Output with Credit Card Updater

When you run Credit Card Updater, you can select to create a control report and an output query of the results, as well as generate attributes to be added to affected constituent and gift records.

Credit Card Updater Control Report

Each time you run Credit Card Updater, you have the option to create a control report with the results of the run. We recommend you always choose to create the control report so you can save or print it to keep for your records.

Warning: The control report is only generated after you run Credit Card Updater, and it does not automatically get saved anywhere. When you view it, select to save or print it so you can refer to it again after you close it.

Credit Card Updater Report

Number of cards registered for future updates:	0
Number of cards deregistered to not receive future updates:	0
Number of cards updated:	4

UPDATE
Credit card updated with new card number and/or expiry date.
The credit card information was successfully updated with a new card number or expiration date.

Constituent Cameron Boyle (Constituent System Record ID: 752)
Date Processed: 05/13/2014   Last 4 Digits: 0016   Expiry: 08/2017
New Last Four Digits: 0115   New Expiry: 08/2018

Pledge May 13, 2014 Cameron Boyle (Gift System Record ID: 1995)
Date Processed: 05/13/2014   Last 4 Digits: 0016   Expiry: 01/2018
New Last Four Digits: 0115   New Expiry: 01/2019

EXPIRY
Credit card updated with new expiry date.

Constituent Cameron Boyle (Constituent System Record ID: 752)
Date Processed: 05/13/2014   Last 4 Digits: 0024   Expiry: 11/2018
New Expiry: 11/2019

**11NS
Non-numeric account number.
Credit card numbers consist of only numeric characters. This message indicates that the credit card information was not updated because it included alphabetic or special characters, such as due to an incorrectly entered credit card number.

Constituent Cameron Boyle (Constituent System Record ID: 752)
Date Processed: 05/13/2014   Last 4 Digits: 1234   Expiry: 11/2020

The Credit Card Updater Report displays every constituent with updated credit card information, and details of how that information changed. The report also lists the corresponding gifts with which the credit cards were associated. For example, if a constituent's credit card got a new number and expiration date, the report shows you what the last four digits of their card used to be, as well as the new last four digits. Next to that, the report shows you the old expiration date, as well as the new expiration date.

The report is split into multiple sections:

• **UPDATE**, **CC**, or **CB** - Any credit cards that were updated with new numbers or both numbers and expiration dates

• **EXPIRY** or **CE** - Any credit cards updated with new expiration dates

• **CONTACT** or **E0620** - Account closed, or contact cardholder. The credit card information was not updated because the account was closed. We recommend you contact the cardholder to obtain new credit card information.

- ****##NS** or **E06##** - Any credit cards that were not updated due to invalid information, or a potential error in credit card data entry. Descriptions are given with each response code to provide the reason why the credit card was not updated. For more information about response codes, see "Response Codes for Invalid Credit Cards" on page 105.

The total number of new credit cards registered for future updates, the number of cards deregistered for future updates, and the total number of cards updated in that Credit Card Updater run appear at the top of the report.

Note: You are only billed for credit cards that are successfully updated with a new expiration date and/or card number. You are not charged for any cards that have a response indicating the account has been closed or has invalid information.

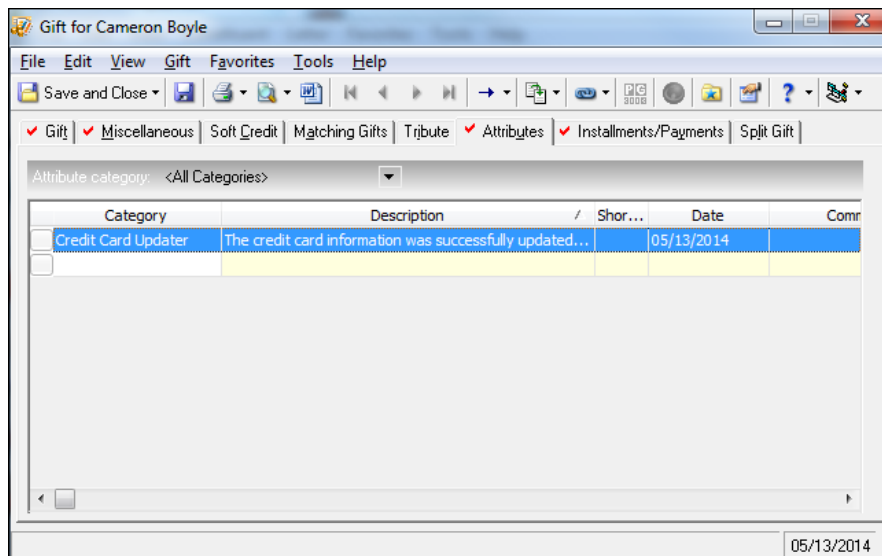## Attributes Created by Credit Card Updater

When you run Credit Card Updater, you can select to add attributes to updated records. We highly recommend you select this option every time you run the process so that you are getting the most information out of each run.
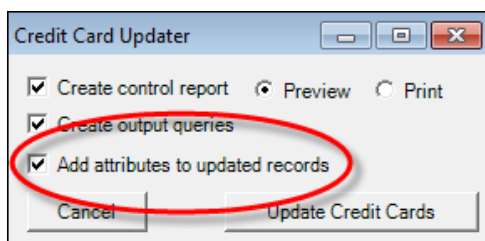
Attributes are added to both the constituent record, and any associated gift records that used the updated credit card for payment.

Attributes are added with a category of Credit Card Updater, and provide detailed information about new card numbers, expiration dates, or any errors in updating due to invalid card numbers - such as card numbers entered incorrectly with non-numeric characters. The date the attribute was added is also included to easily determine the date of the Credit Card Updater run.
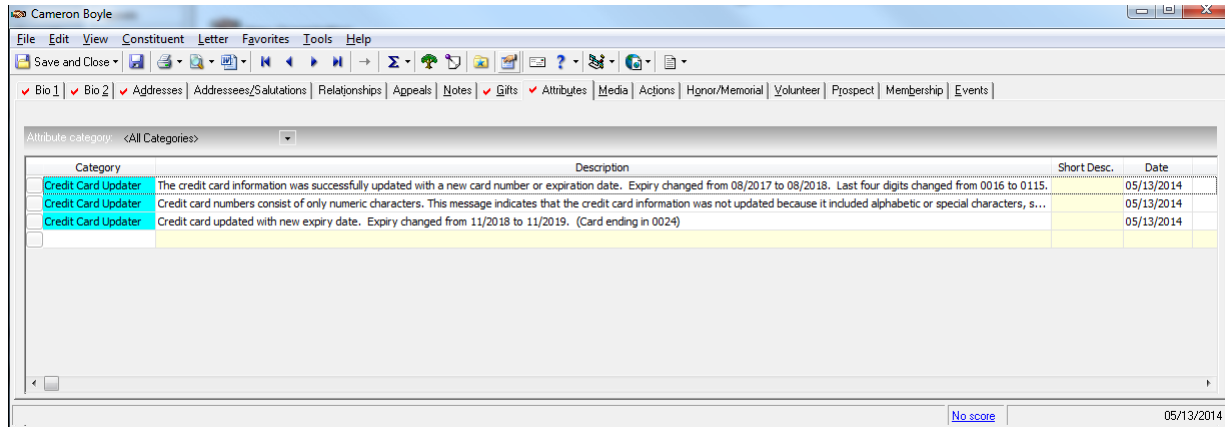
*Tip:* You can take advantage of the attributes added to constituent and gift records by using them to determine if you need to reach out to a donor for any reason, such as if the Credit Card Updater run returned information about an invalid credit card.

Credit Card Updater Output Queries

When you run Credit Card Updater, you can select to create a constituent and gift output query of your results. We highly recommend you select this option every time you run the process so that you are getting the most information out of each run.
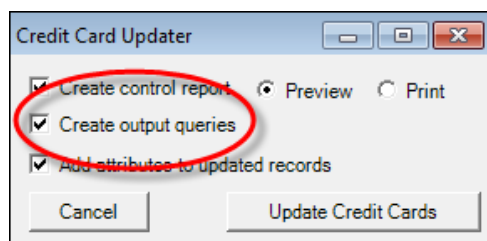
The constituent and gift queries created when you run Credit Card Updater display each constituent and gift that had a credit card updated as a result of the run. You can use these lists as verification of the data changed, and also to determine if you need to reach out to any specific constituents, such as if Credit Card Updater returned invalid credit card information.

Note: Information in uncommitted batches will not appear in output queries.

The output queries are saved with the names **Credit Card Updater - Constituents Updated** and **Credit Card Updater - Gifts Updated**.

Response Codes for Invalid Credit Cards

When you run Credit Card Updater, some cards that should be picked up by the process may not be due to invalid card information. To identify the reason why these cards were not updated, response codes are provided in the Credit Card Updater control report. Below is a list of each possible response code, and what they mean.

- ****05NS** or **E0100** - Bad card type, or Credit card number is not an American Express number. The first six digits of a credit card number provide the issuer identification number (IIN), which indicates the type of credit card, such as Visa or MasterCard. This message indicates that the credit card information was not updated because the IIN did not match its card type, such as due to an incorrectly entered credit card number.

- ****06NS** - Bad check digit value. The final digit of a credit card number is a "check digit" that validates the authenticity of the number through the Luhn algorithm. This message indicates that the credit card information was not updated because the card number failed a check digit validation, such as due to an incorrectly entered credit card number.

- ****04NS** - Invalid account number length. Credit card numbers have a standard number of digits, based on credit card type. This message indicates that the credit card information was not updated because it did not contain the correct number of digits, such as due to an incorrectly entered credit card number.

- ****11NS** - Non-numeric account number. Credit card numbers consist of only numeric characters. This message indicates that the credit card information was not updated because it included alphabetic or special characters, such as due to an incorrectly entered credit card number.

- ****12NS** or **E0210** - Invalid expiration date, or Invalid format for expiration date. The credit card information was not updated because the expiration date was formatted incorrectly.
- ****19NS** - Merchant not registered. The credit card information was not updated because credit card update service is not currently enabled with the bank.
- ****30NS** - TransArmor unable to update token.
- **CONTAC** - Account closed or contact cardholder. The credit card information was not updated because the account was closed. We recommend you contact the cardholder to obtain new credit card information.
- **E0610** - Registry rejected due to cardmember opt-out. The credit card information was not updated because the cardholder opted out of American Express *Cardrefresher* .
- **E0630** - Merchant is blocked by cardmember. The credit card information was not updated because the cardholder put a block on your organization.

Free Data Checkup

In this chapter

With the **Data Health Center**, you can submit data from your database to Blackbaud for a free checkup. The information you send is analyzed and missing, outdated, and incomplete information identified.

Submit Data for Free Checkup

To send your data to Blackbaud, you must create an export file containing the information you want us to analyze. The Create Data Health Export File wizard, takes you step-by-step through this process. After you complete the export file, the **Submit File Now** button sends the data to Blackbaud. Once our analysis is complete, we call you to report the results. You can then use the results to determine which **Data Health Center** update utility is needed to update your data.

➢ **Creating an export file and sending the file to Blackbaud**

1. On the Raiser's Edge bar, click **Data Health Center**. The Data Health Center page appears. All health center services available appear.
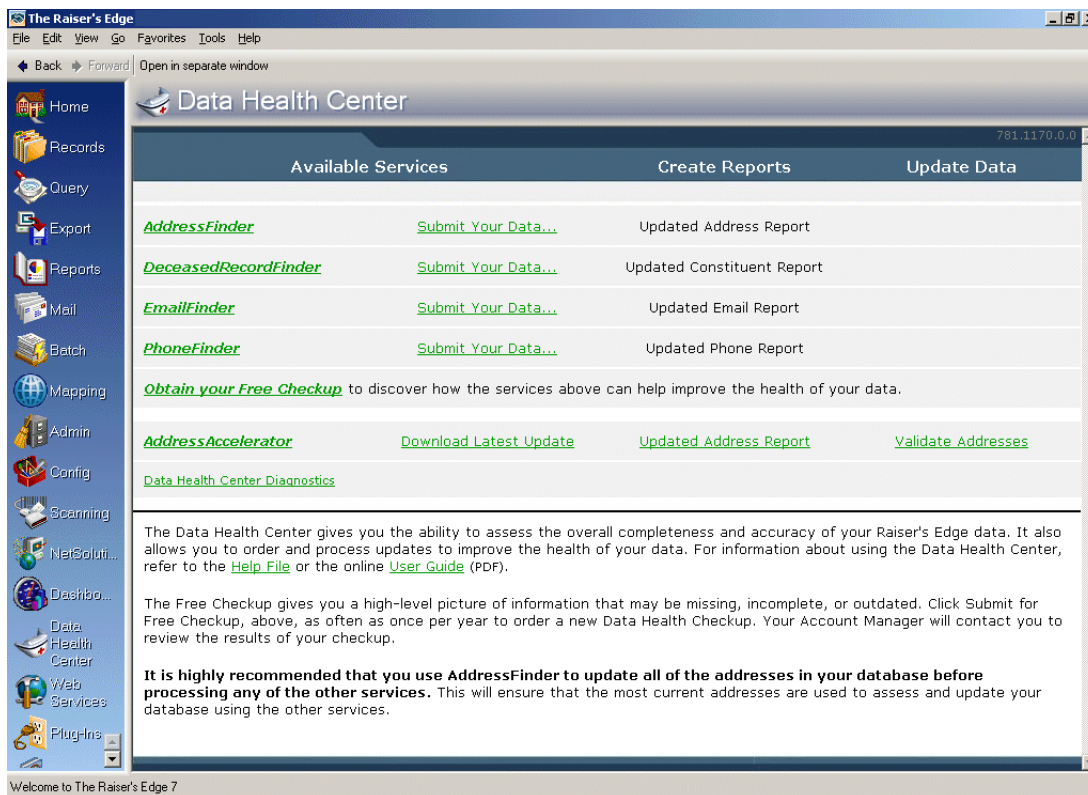
Note: Before submitting the export file to Blackbaud, confirm you can connect to Blackbaud's ftp site by clicking the **Data Health Center Diagnostics** link. Mark **Test FTP Connectivity** and click **Run**.

2. On the Data Health Center page, click **Obtain your Free Checkup.** The Create Data Health Checkup Export File screen appears.


3. Click **Include** at the top of the screen to select the constituent records you want to check. You can include **All Records** or **Selected Records**. If you choose **Selected Records**, the Open Query screen appears, so you can select the query containing the constituent records you want to check.

   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*.

4. When you click **Include** in the **Addresses to Check** frame you can select to include **All Addresses** or **Selected Addresses** in the checkup. If you select **Selected Addresses** the Customization Options for Addresses to Check screen appears, displaying an Individuals and an Organizations tab. For information about completing these tabs, see "Individuals Tab" on page 111 and "Organizations Tab" on page 112.

5. In the **Phone/Email Type to Use** frame, select the **Phone Type** and **Email Type** from the constituent records you want to include in your export file. For example, you may want to include the "Home" phone type and the "Business email" email type in your checkup.

6. In *The Raiser's Edge*, if a constituent's spouse is also a constituent in your database, a **Head of Household** checkbox appears on the General tab of the spouse relationship record, allowing you to determine who in the relationship should be designated as the head of household. The **Head of Household** checkbox is often used to determine who should receive a particular mailing. On the Create Data Health Checkup Export File screen, in the **'Head of Household' Processing** frame, you can choose how to handle this situation: **Export only constituents marked Head of Household**, **Export the first constituent found**, or **Export both constituents separately**.

7. You can further refine your export criteria using the **Include these Constituents** frame. To include constituents with the **Is inactive** checkbox marked on the Bio 1 tab of their constituent record, mark **Inactive constituents**; to include constituents with the **Deceased?** checkbox marked on the Bio 1 tab of their constituent record, mark the **Deceased constituents** checkbox; to include constituents with the **Has no valid addresses** checkbox marked on the Bio 1 tab of their constituent record, mark the **Constituents with no valid address** checkbox.

8. Mark **Create control report** to print a report listing the criteria selected for the export and all constituents included in the export. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

9. Mark **Create exception query** to generate an exception file at the end of your export. The file contains all fields the program did not successfully export.

10. Mark **Create output query** if you want to create a query of all records exported.

11. Click **Next**. The Summary tab appears, displaying an overview of the criteria you selected for your export file.
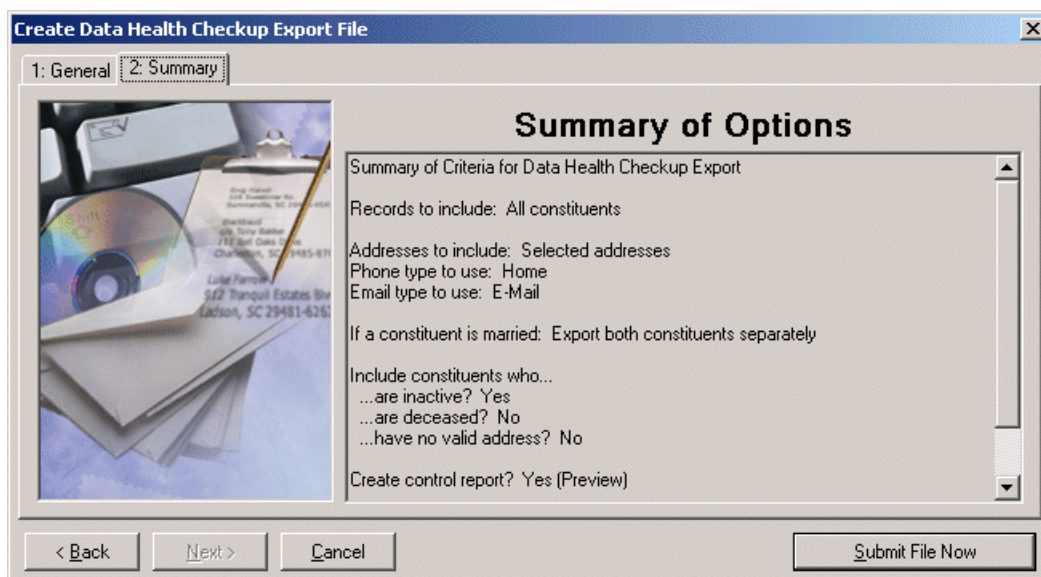
Note: If on the General tab you selected to create an exception and/or output query, screens appear before the export runs, asking you to name and define your queries.

12. Click **Submit File Now** to send the file to Blackbaud. A message appears, confirming your export file was sent successfully.
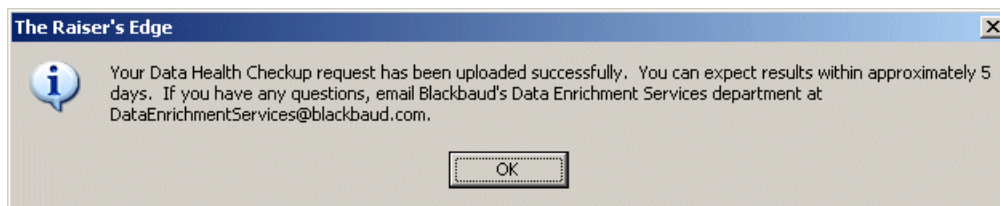
13. When Blackbaud completes the data checkup, a representative calls you to discuss the results.

Individuals Tab

On the Individuals tab of the Customization Options for Addresses to Check screen, select the address type to export 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 export for each individual.

➢ **Completing the Individuals tab**

On the Individuals tab, you select the address type to include in your export.

1. In Step 1, you can include seasonal addresses in the export by marking the **Consider addresses with seasonal dates as of** checkbox. When you mark this checkbox, 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 01/01/2001. The date information you enter is used to determine if 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.

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. To select the address type to include, 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, sort the address types in the order of importance. To move an address type in 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 include the Preferred address. Because the program selects the address to include based on its position in the **Addresses to use** box, use the arrows to move the Preferred address to the top of the list.

3. In Step 3, you can use attributes to choose the address type to include 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 export. When you finish entering address attributes, click **OK**. A display appears to the right of the **Address Attributes** button, listing the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

Note: For information about entering attributes in *The Raiser's Edge*, see the *Constituent Data Entry Guide*.

4. In Step 4, select the address type the program should include if it cannot find an address type meeting your selections in Steps 1 through 3.

5. Select the Organizations tab. For information about completing this tab, see "Organizations Tab" on page 112.

Organizations Tab

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to include for organization constituents.

The addresses of each organization constituent in the export are processed using three or four steps on the Organizations tab, depending on what you select in Step_1.
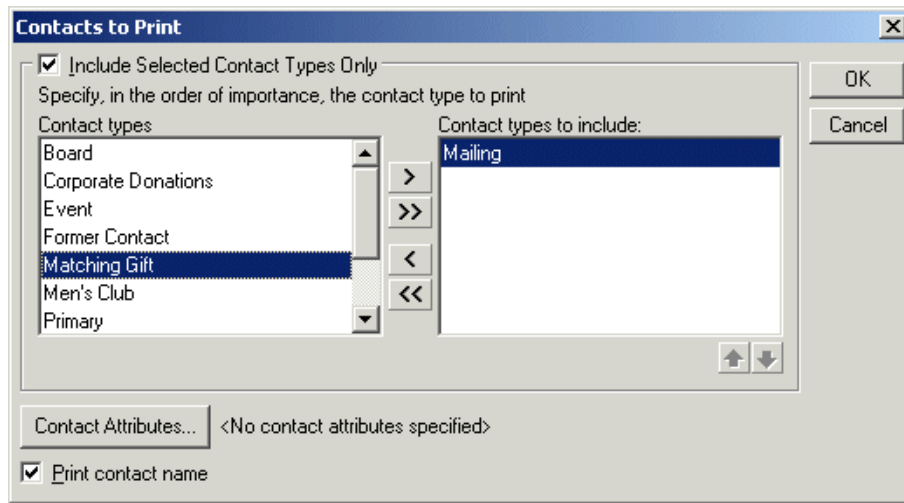
➢ **Completing the Organizations Tab**

On the Organizations tab of the Customization Options for Addresses to Check screen, select the address type to include for each organization constituent.

1. In Step 1, you can choose to include the address of an organization's contact or the address of only the organization. Your selection in Step 1 affects the rest of the steps on this tab.

2. In Step 2, if you select in Step 1 to include only the organization's address, move the address types you want to include from the **Addresses** box to the **Addresses to use** box. To select the address type to include, 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, sort the address types in the order of importance. To move an address type in 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 include the Preferred address. Because the program selects the address to include based on its position in the **Addresses to use** box, 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, you must complete the following steps.

a. You can specify the contact types you want to include by clicking **Contact Information**. 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 export. To select the contact type you want to use, highlight the contact type in the **Contact types** list and click the single right arrow to move it to the **Contact types to include** list.

c. If you list multiple contact types in the **Contact types to include** list, sort the contact types in the order of importance. To move a contact type in the **Contact types to include** list, highlight the contact type and click the up or down arrow as necessary.

d. You can also filter the contacts included based on attributes entered on their constituent records by clicking the **Contact Attributes** button. The Contact Attributes to Consider screen appears. On this screen, in the **Filter** column, select to Include or Exclude the contact based on the selected attributes. Next, select the address attribute **Category** and **Description** on which to base this attribute filter based. Click **OK** to close the Contact Attributes to Consider screen.

e. Mark the **Print contact name** checkbox to include the contact name with the address.

f. 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>.

g. If you selected in Step 1 to **Print contacts**, you can include or exclude contacts' addresses based on address attributes by clicking the **Contact Address Attributes** button in Step 2. When you click **Contact Address Attributes**, the Contact Address Attributes to Consider screen appears.

h. You can select an address attribute category and description that must be present on an address to be considered for the export. 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. 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>.

Note: For information about entering attributes in **The Raiser's Edge**, see the *Constituent Data Entry Guide*.

3. If you select in Step 1 to include only the organization's address, in Step 3 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 export. For example, to include addresses with the attribute category of Mailing Address and a description of Lost Address, enter the information on this screen. 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.

4. If you select in Step 1 to **Print only the organization**, Step 4 appears. In Step 4, 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.

5. Click **OK** to return to the Create PhoneFinder Export File.

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