

Blackbaud Fundraiser Performance Management™

ACTIVITY CENTER EXPORT GUIDE

VERSION 2018.3

Overview

The Blackbaud Fundraiser Performance Management Activity Center File Export Guide is designed to provide you information on the output files created for you as a part of your Activity Center subscription.

Nightly File Export

As a part of your subscription to Activity Center, you are provided with the contact report, task, and proposal data entered by your users. This data is refreshed each night, and always contains all data entered by your users, as opposed to only containing the daily updates. The file is exported to your folder's SFTP "download" folder, which is on the same site as the "upload" folder that your institution uploads its Fundraiser Performance Management files.

Additionally, you can retrieve your Activity Center data through BBFPM API to import back into your database. Please contact Support if you are interested in using this option.

File Format

The files are exported as text files, and use a || delimiter.

Naming Conventions

The exported files are named reeher_contact_reports_2018_3.txt, reeher_tasks_2018_3.txt, reeher_proposals_2018_3.txt, reeher_proposal_assignments_2018_3.txt, reeher_prospect_2018_3.txt, reeher_contact_related_contact_2018_3.txt, reeher_contact_related_task_2018_3.txt, reeher_proposal_related_contact_2018_3.txt, reeher_proposal_related_task_2018_3.txt, and reeher_proposal_master_proposal_2018_3.txt.

File 1: Contact Reports

This file contains all contact reports entered by your users in Fundraiser Performance Management. Contact Reports can have multiple records if multiple entities or officers were associated with the contact.

Number	Name	Description	Format
1	Contact Report ID	Unique reference ID of the activity.	string/text
2	Entity ID	ID of entity related to the activity.	string/text
3	Officer ID	ID of officer related to the activity.	string/text
4	Activity Type Description	e.g. Visit, Phone Call, Email, etc.	string/text
5	Activity Date		mm/dd/yyyy
6	Start Time		hh:mm tt
7	End Time		hh:mm tt
8	Activity Purpose Description	e.g., Cultivation, Identification, Information, Qualification, Solicitation, Stewardship	string/text
9	Measured Indicator		string/text
10	Active Indicator		Yes or No
11	Creator	User who created the activity.	string/text
12	Created Date	Date the activity was created.	MM/dd/yyyy HH:mm:ss
13	Modifier	User who last modified the activity.	string/text
14	Modified Date	Date the activity was last modified.	MM/dd/yyyy HH:mm:ss
15	Subject/Title	Short description of the activity. (150 Character Limit)	string/text
16	Description/Summary	Full description of the activity. (12,000 Character Limit)	string/text
17	Status	e.g., Planned, In Progress, Completed, Overdue	string/text
18	Activity Type Code		string/text
19	Activity Purpose Code		string/text
20	Creator ID	ID of user who created the activity.	string/text
21	Modifier ID	ID of User who last modified the activity.	string/text
22	Master Proposal ID	ID of the master proposal associated with the activity.	string/text
23	School/Unit Description	The school/unit associated with the proposal, if applicable (e.g. School of Business, Athletics, etc.)	string/text
24	School/Unit Code		string/text
25	Project of Interest Description	The project that the call report is associated with or was made in support of	string/text
26	Project of Interest Code		string/text
27	Goals & Strategy for Contact	Free Text (255 Character Limit)	string/text
28	Primary Officer Indicator		Yes or No
29	Primary Entity Indicator		Yes or No
30	Outcome Description		string/text
31	No Follow-up Reason	The reason if no follow-up is needed.	string/text
32	Follow-up Comment		string/text
33	Outcome Code		string/text

File 2: Tasks

This file contains all tasks entered by your users in Fundraiser Performance Management. Tasks can have multiple records if multiple entities were associated with the task.

Number	Name	Description	Format
1	Task ID	Unique reference ID of the task.	string/text
2	Task Owner	The user assigned to the task.	string/text
3	Due Date		mm/dd/yyyy
4	Start Time		hh:mm tt
5	End Time		hh:mm tt
6	Entity ID	ID of entity the task relates to	string/text
7	Pending	If a task is pending, that means it has not yet been accepted by the assigned owner.	Yes or No
8	Active Indicator	Tasks that are not active are those that have been deleted.	Yes or No
9	Creator	The user who created the task.	string/text
10	Created Date	Date the task was created.	MM/dd/yyyy HH:mm:ss
11	Modifier	The user who last modified the task.	string/text
12	Modified Date	The date the task was last modified.	MM/dd/yyyy HH:mm:ss
13	Subject	Short description of the task.	string/text
14	Description	Full description of the task.	string/text
15	Status	Either "Completed" or "Planned".	string/text
16	Task Owner ID	ID of the user assigned to the task.	string/text
17	Creator ID	ID of the user who created the task.	string/text
18	Modifier ID	ID of the user who last modified the task.	string/text
19	Proposal ID	ID of the proposal associated with the task.	string/text

File 3: Proposals

This file contains all proposals entered by your users in Fundraiser Performance Management.

Number	Name	Description	Format
1	Proposal ID	Unique reference ID of the proposal.	string/text
2	Creator	The user who created the proposal.	string/text
3	Creator ID	ID of the user who created the proposal.	string/text
4	Created Date	Date the proposal was created.	MM/dd/yyyy HH:mm:ss
5	Modifier	The user who last modified the proposal.	string/text
6	Modifier ID	ID of the user who last modified the proposal.	string/text
7	Modified Date	The date the proposal was last modified.	MM/dd/yyyy HH:mm:ss
8	Proposal Name	Free Text (150 Character Limit)	string/text
9	Prospect ID		string/text
10	Proposal Type Description	e.g. Program Support, Scholarships, Unrestricted, Endowment	string/text
11	Proposal Type Code		string/text
12	Proposal Status Description	e.g. In Development, Pending, Approved, Declined	string/text
13	Proposal Status Code		string/text
14	Ask Amount	Amount originally requested	numeric value
15	Granted Amount	Actual amount committed	numeric value
16	Granted Date	Date the proposal was approved/granted	MM/dd/yyyy
17	Target Amount	Target amount of future ask	numeric value
18	Target Ask Date	Future date the ask will be made	MM/dd/yyyy
19	Ask Date	Actual date of solicitation that relates to the ask amount	MM/dd/yyyy
20	Expected Amount	Amount of the proposal that is expected to be granted/committed	numeric value
21	Expected Date	Future date the proposal is expected to close	MM/dd/yyyy
22	Proposal Stage	Current stage that the proposal is in within the proposal development cycle	string/text
23	School/Unit Description	The school/unit associated with the proposal, if applicable (e.g. School of Business, Athletics, etc.)	string/text
24	School/Unit Code		string/text
25	Project of Interest Description	The individual initiative that the proposal is associated with or was made in support of	string/text
26	Project of Interest Code		string/text
27	Comments	Free Text (500 Character Limit)	string/text
28	Active Indicator		Yes or No
29	Proposal Funding Type Description	Indicates the gift funding type of the proposal	string/text
30	Proposal Funding Type Code		string/text
31	Campaign Project Description	Indicates which capital campaign project the transaction should be associated with	string/text
32	Campaign Project Code		string/text

File 4: Proposal Assignments

This file contains all proposal assignments for proposals entered by your users in Fundraiser Performance Management. Proposals can have multiple records if multiple officers were associated with the proposal.

Number	Name	Description	Format
1	Proposal ID	Unique reference ID of the proposal assignment.	string/text
2	Creator	The user who created the proposal assignment.	string/text
3	Creator ID	ID of the user who created the proposal assignment.	string/text
4	Created Date	Date the proposal assignment was created.	MM/dd/yyyy HH:mm:ss
5	Modifier	The user who last modified the proposal assignment.	string/text
6	Modifier ID	ID of the user who last modified the proposal assignment.	string/text
7	Modified Date	The date the proposal was last modified.	MM/dd/yyyy HH:mm:ss
8	Staff ID	ID of the staff member assigned to the proposal.	string/text
9	Assignment Type Description	e.g. primary, non-primary	string/text
10	Assignment Type Code		string/text
11	Active Indicator	Indicates the proposal continues to be associated with the staff	Yes or No

File 5: Prospect ID

This file contains all Prospect IDs entered by your users in Fundraiser Performance Management. Prospect IDs can have multiple Entity IDs associated with them.

Number	Name	Description	Format
1	Prospect ID		string/text
2	Prospect ID Name	Unique name to identify the prospect.	string/text
3	Entity ID	ID of entity related to the prospect.	string/text
4	Primary Entity ID		Yes or No

File 6: Contact Related Contact

This file contains all relationships for contact reports to other contact reports entered by your users in Fundraiser Performance Management. Contact reports can have multiple contact reports associated with them.

Number	Name	Description	Format
1	Contact Report ID		string/text
2	Contact Report ID – Related		string/text
3	Active Indicator		Yes or No

File 7: Contact Related Task

This file contains all relationships for contact reports to tasks entered by your users in Fundraiser Performance Management. Contact reports can have multiple tasks associated with them.

Number	Name	Description	Format
1	Contact Report ID		string/text
2	Task ID		string/text
3	Active Indicator		Yes or No

File 8: Proposal Related Contact

This file contains all relationships for proposals to contact reports entered by your users in Fundraiser Performance Management. Proposals can have multiple contact reports associated with them.

Number	Name	Description	Format
1	Proposal ID		string/text
2	Contact Report ID		string/text
3	Active Indicator		Yes or No

File 9: Proposal Related Task

This file contains all relationships for proposals to tasks entered by your users in Fundraiser Performance Management. Proposals can have multiple tasks associated with them.

Number	Name	Description	Format
1	Proposal ID		string/text
2	Task ID		string/text
3	Active Indicator		Yes or No

File 10: Proposal Master Proposal

This file contains all relationships for master proposals to sub-proposals entered by your users in Fundraiser Performance Management. Multiple sub-proposals can be associated with a master proposal ID.

Number	Name	Description	Format
1	Master Proposal ID		string/text
2	Master Proposal Name		string/text
3	Proposal ID		string/text
4	Proposal Name		string/text

Appendix: Export Guide Version Changes Tracking (versus 2018.2 version)

This table contains all data request guide changes comparing this version to the previous version. The change type of “Add” denotes a new field or file, “Update” denotes an edit to a previously existing field or file, “Delete” denotes a field or file was removed.

Number	Change Type	File	Field	Change Description
1	Update	ALL	n/a	File naming conventions changed to include “_2018_3” to reflect updated version. “reeher_activities.txt” file name updated to “reeher_contact_reports_2018_3.txt” to match name of File 1.
2	Update	Contact Reports	Outcome Description	Field #30 was previously labeled as “Next Step”. This has been updated to be “Outcome Description”. There is not change to the data included in this column.
3	Add	Contact Reports	Outcome Code	Corresponding codes to Outcome Descriptions will be provided if applicable.
4	Add	Proposals	Campaign Project Description	Add new field to help connect proposals to campaign projects.
5	Add	Proposals	Campaign Project Code	See #1 above.