Blackbaud Fundraiser Performance Management™

Data Request Guide

Version 2021.1

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Overview

The Blackbaud Fundraiser Performance Management Data Request Guide provides you with guidelines for setting up your institution's nightly data feed. We understand that you may not track all requested fields or may track some information differently than outlined here. Please contact support if you would like to discuss alternative methods for extracting the data.

Automated Nightly File Transfer

A nightly data feed will be set up to supply the application with up-to-date fundraising information from your institution's donor management system(s). This process is straightforward, and our Customer Care team will help to establish this process if you do not have something currently in place. This process involves two steps.

1. The nightly extract is set up by creating several queries or exports to pull the information into text files from your institution's system. This includes exporting the full files each night, and not only updates.
2. These files will be scheduled to automatically transfer to Blackbaud's server via SFTP (Secure File Transfer Protocol) each night. Typically, files are transferred between 10 pm and 1 am central time. You just need to provide the IP address of the machine that will transfer the files and you will be provided with a username and password for you to access your institution's folder on the server. The use of SSH keys, or public keys, as a means of authentication for the SFTP is supported.

RECOMMENDED FILE STANDARDS

Following the recommended file standards will ensure that high quality data is loaded into Blackbaud Fundraiser Performance Management on a nightly basis.

- **File Delivery**
  - Schedule the upload to the SFTP after all files have been created instead of uploading files iteratively.
- **File Format**
  - Each file should be prepared in a tab delimited or comma separated values (csv) format.
  - If you are using the csv format, use double quote enclosures for any fields containing commas.
  - If you are using the tab delimited format, convert any values with tabs to spaces.
  - Remove any embedded carriage returns/line feeds from field values
  - File 3.1b: Activity Details does not follow the same standard format. See unique file format instructions on page 20.
- **Field Type Format**
  - Dates: Should be standardized in the correct format, 'MM/dd/yyyy'. Except where only a year is requested, (e.g., Preferred Class Year) do <u>not</u> send partial dates (e.g., MM/yyyy).
  - Email Addresses: Ensure email addresses are valid and in the correct format, xxxxxxxx@xxxx.xxx
- **Naming Conventions**
  - File names should match the names as outlined in this guide. The entity file should be titled "Entity".
  - Do not include date stamps or version numbers in file names that would change on a regular basis.
  - If splitting a file into multiple files, please name the files by adding a letter and short description (e.g., Entity_a_Persons, Entity_b_NonPersons).

File Priorities

File Priorities in Implementation

During an institution's initial implementation of Blackbaud Fundraiser Performance Management, the data files found in this Data Request Guide are broken down by the following priority groups to best organize the work and manage the timeline. The Priority 1 Files will help with validating your dollar and donor counts along with looking at all your constituents and identifying those who will receive custom predictive scores. This will also give you time to work on the remaining Priority 2 and 3 files while we continue with the implementation project. The priority group is also noted in the top right corner of each file page.

Files by priority group:

Priority 1 Files	Priority 2 Files	Priority 3 files
File 1.1: Entity	File 2.2: Appeals	File 1.2b: Email Addresses
File 2.1: Donor Transaction History	File 2.3: Appeal Entity	File 1.5b: Giving Societies
File 1.2a: Addresses	File 3.1a: Activity History	File 1.7: Athletics
File 1.2c: Phones	File 3.1b: Activity Details	File 1.8: Associated Entities
File 1.3: Degrees	File 3.2: Staff Information	File 4.2: Customer Specific Codes
File 1.4: Relationship Type	File 3.3: Prospect Entity	File 4.3: Social Media Links
File 1.5a: Participation History	File 3.4a: Prospect Status	File 4.4 Web addresses
File 1.6: Contact Restrictions	File 3.4b: Prospect Stage History	
File 4.1: Code Translation Table	File 3.5: Portfolio Assignments	
	File 3.6a: Proposal	
	File 3.6b Proposal Comments	
	File 3.7: Proposal Assignment	

File 1.1: Entity — Priority 1

All relationships that are tracked in your system should be provided in the Entity file regardless of relationship type, relationship status, or whether you solicit them.

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

Number	Name	Description	Preferred Format
1	Entity ID	Unique ID of the entity	string/text
2	First Name	Entity's first name if person, or organization name if non-person	string/text
3	Middle Name		string/text
4	Last Name		string/text
5	Preferred Email		string/text
6	Birth Date		MM/dd/yyyy
7	Marital Status*		string/text
8	Nickname		string/text
9	Prefix	e.g., Mr., Mrs., Dr.	string/text
10	Suffix	e.g., M.D., Ph.D.	string/text
11	Preferred Mailing Name	Preferred mailing address name of the individual entity	string/text
12	Job Title		string/text
13	Employer		string/text
14	Relationship Status*+	e.g., Active, Inactive, Deceased, Lost	string/text
15	Primary Relationship Type*+	e.g., Alumni, Friend, Parent	string/text
16	Preferred Class Year		yyyy
17	Gender*		string/text
18	Spouse Name	Spouse's full name, including any Prefix and/or Suffix(es)	string/text
19	Spouse ID	Spouse's entity ID	string/text
20	Married Alumni Indicator	Indicator that entity's spouse is an alumnus/a	1=Yes, 0=No
21	Maiden Name	Maiden name of the entity	string/text
22	Ethnicity*		string/text
23	Occupation*	e.g., Educator, Administrative Support, Attorney/Counsel	string/text
24	Industry*	e.g., Manufacturing, Finance, Education	string/text
25	Preferred Joint Mailing Name	Preferred household mailing address name	string/text
26	Primary Entity ID	Entity ID of the primary entity between the entity and the spouse. If not available, the lowest Entity ID between the entity's Entity ID and the Spouse ID will be used as Primary Entity ID.	string/text
27	Annual Fund Ask Amount*	The amount that an entity is rated for the Annual Fund as an Annual Fund Ask Amount (if available)	string/text
28	Planned Giving Indicator	Indicates that the constituent has a planned gift	1=Yes, 0=No
29	Outstanding Pledge Amount	A single amount representing the entity's total outstanding pledge balance	String/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(+) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 1.2a: Addresses **Priority 1**

The Addresses file provides all active addresses for each constituent, and identifies which address is their primary home, which address is their primary business, and which address is their preferred. Only valid addresses should be included in the file (do not include previous addresses or invalid addresses).

The file can contain multiple rows per entity for each active address associated with the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Address Line 1		string/text
3	Address Line 2		string/text
4	Address Line 3		string/text
5	City		string/text
6	State		string/text
7	Zip Code	Zip Code (with Zip+4, if available, for the entity's address (e.g., 91234-8765))	string/text
8	Country		string/text
9	Address Type*	e.g., Home, Business, Seasonal	string/text
10	Primary Home Indicator	Indicates the address is the entity's primary home address. A maximum of one address per entity should be indicated as primary home. The indicated address will show up in the constituent's Relationship Profile as their primary home address.	1=Yes, 0=No
11	Primary Business Indicator	Indicates the address is the entity's primary business address. A maximum of one address per entity should be indicated as primary business. The indicated address will show up in the constituent's Relationship Profile as their primary business address.	1=Yes, 0=No
12	Preferred Indicator	Indicates the address is the entity's preferred address. A maximum of one address per entity should be indicated as preferred. The indicated address will show up in Fundraiser Performance Management as the constituent's preferred address.	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.2b: Email Addresses **Priority 3**

The Email Addresses file provides all active email addresses for each constituent.

The file can contain multiple rows per entity for each email address associated with the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Email Type*	e.g., Personal, Business	string/text
3	Email Address		string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.2c: Phones **Priority 1**

The Phones file provides all active phone numbers for each constituent, and identifies which phone number is their primary home, which phone number is their primary business, which phone number is their mobile, and which phone number is their preferred. Only current, valid phone numbers should be included in the file (do not include previous phone numbers or invalid phone numbers).

The file can contain multiple rows per entity for each active phone number associated with the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Phone	Can be sent in whatever format you prefer to see in FPM (e.g., (123) 456-7890, 123-456-7890 ext. 147)	string/text
3	Phone Type*	e.g., Home, Business, Mobile	string/text
4	Primary Home Indicator	Indicates the phone number is the entity's primary home phone number. A maximum of one phone number per entity should be indicated as primary home.	1=Yes, 0=No
5	Primary Business Indicator	Indicates the phone number is the entity's primary business phone number. A maximum of one phone number per entity should be indicated as primary business.	1=Yes, 0=No
6	Mobile Indicator	Indicates the phone number is the entity's mobile phone number. A maximum of one phone number per entity should be indicated as mobile.	1=Yes, 0=No
7	Preferred Indicator	Indicates the phone number is the entity's preferred phone number. A maximum of one phone number per entity should be indicated as preferred.	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.3: Degrees **Priority 1**

The Degrees file contains all the school and degree of graduation information relating to entity records.

This file should only include degrees earned from your university or college.

The file may contain multiple rows per entity if the entity is associated with more than one degree, major or school of graduation.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	School of Graduation*		string/text
3	Degree Year		yyyy
4	Degree of Graduation*		string/text
5	Major*		string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.4: Relationship Type **Priority 1**

The Relationship Type file contains all the various types of relationship types that the entity has with your institution.

The file should contain multiple rows per entity corresponding to each relationship type related to the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Relationship Type*⁺	e.g., Alumni, Friend, Parent	string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(⁺) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 1.5a: Participation History Priority 1

The Participation History file contains all categories of entity involvement with your institution. Examples would include committees, events, volunteering, traveling, undergraduate activities if available, Greek organizations, alumni associations, intramural athletics, boards, et cetera.

The file should contain multiple rows per entity corresponding to each participation activity of the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Participation Category*	e.g., Event, Committee, Clubs, Volunteer	string/text
3	Activity Name*	e.g., President's Dinner, Alumni Association Committee,	string/text
4	Activity Role*	e.g., Chair, Attendee, President	string/text
5	Activity Status*	e.g., Active, Inactive, Current, Former	string/text
6	Start Date	Date the activity started	MM/dd/yyyy
7	Stop Date	Date the activity ended	MM/dd/yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.5b: Giving Societies — Priority 3

The Giving Societies file provides all giving society codes and details.

The file should contain a row for each giving society that relates to an entity record.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Giving Society Name*		string/text
3	Giving Society Category*		string/text
4	Active Indicator	Indicates that the entity is actively in the giving society	1=Yes, 0=No
5	Start Date	Date that entity joined the giving society	MM/dd/yyyy
6	Stop Date	Date that entity joined left giving society	MM/dd/yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.6: Contact Restrictions

Priority 1

The Contact Restrictions file provides all contact and/or solicitation restriction codes.

The file should contain multiple rows for each restriction code that relates to an entity record.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Restriction Code*	e.g., No Phone Calls, No Mail, No Contact, No Solicitation, No Magazine	string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.7: Athletics **Priority 3**

The Athletics file is designed to collect information on participation in student athletic activities during their time as a student. This file should include only NCAA athletics or the intercollegiate equivalent thereof if the institution competes in a different collegiate level and should include all athletics activities of that type available. Any non-NCAA or intramural athletics should be recorded in the Participation History file.

The file can contain multiple rows per entity corresponding to the number and type of athletics activities the entity participated in and when they participated.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Athletics Activity*	e.g., Baseball, Basketball, Volleyball	string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 1.8: Associated Entities Priority 3

The Associated Entities file should provide us with all associations between your constituents, including spouses, parents, children, siblings, co-workers, et cetera.

The file should contain one row for each constituent related to the entity and can contain more than one row per entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Associated Entity ID	ID of the associated entity, if available, should correspond with the Entity ID in the Entity file. If no entity record exists for the associated entity, this field can be left blank.	string/text
3	Associated Entity Name	Name of the associated entity	string/text
4	Associated Relationship Type*⁺	e.g., spouse, parent, child, sibling, co-worker. Explains how the Associated Entity is related to the Entity, as opposed to how the Entity is related to the Associated Entity. For example, if the type is "Parent", this would indicate that the Associated Entity is a Parent of the Entity.	string/text
5	Associated Entity School of Graduation*	School of graduation of the associated entity, if available	string/text
6	Associated Entity Class Year	Class Year of the associated entity, if available	yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(⁺) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 2.1: Donor Transaction History **Priority 1**

The Donor Transaction History file contains the full donation history of the institution and should not be limited to a certain date range or group of constituents. It should include transactions from deceased individuals as well as active individuals to provide accurate reporting for historical periods.

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

Number	Name	Description	Preferred Format
1	Transaction ID	Reference ID for the Transaction	string/text
2	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
3	Legal Amount	Legal amount of the transaction	numeric value
4	Credit Amount	Credit amount of transaction	numeric value
5	Transaction Date	Receipt date of the transaction	MM/dd/yyyy
6	Transaction Type Code*	e.g., Gift, Pledge, Pledge Payment	string/text
7	Appeal Code*	Appeal code that ties to specific appeal (like a direct mail piece or call center) from the Appeals file	string/text
8	Annual Fund Indicator	Indicates transaction associated with annual fund	1=Yes, 0=No
9	Campaign Project Code*	Indicates which capital campaign project the transaction should be associated with.	string/text
10	Cash Indicator	Indicates the transaction is cash or cash equivalent (e.g., gifts and pledge payments). Essentially includes everything except pledges.	1=Yes, 0=No
11	Commitment Indicator	indicates if the transaction is considered a commitment (e.g., gifts and pledges)	1=Yes, 0=No
12	Pledge Payment Indicator	indicates if the transaction is considered a pledge payment	1=Yes, 0=No
13	Designation Code*	e.g., XYZ Scholarship, ABC Fund (should use the corresponding codes in this file)	string/text
14	Designation School/Unit*	e.g., School of Business, Library, Athletics (should use the corresponding codes in this file)	string/text
15	Designation Purpose*	e.g., Endowment, Unrestricted, Research (should use the corresponding codes in this file)	string/text
16	Pledge Indicator	Indicates transaction is considered a pledge	1=Yes, 0=No
17	Processing Date	Date that the transaction was processed (may be a different later date than Transaction Date)	MM/dd/yyyy
18	Proposal ID	Proposal ID of the Proposal that the transaction is attached to, if applicable and stored in your database	string/text
19	Fiscal Year	The Fiscal Year that the transaction was attributed	yyyy
20	Donor Indicator	Indicator that the constituent on the transaction is counted as a donor for this specific transaction	1=Yes, 0=No
21	Pledge Balance	Amount that has not yet been paid on a pledge transaction	numeric value
22	Pledge Status	e.g., Active, Paid, Cancelled	string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 2.2: Appeals **Priority 2**

The Appeals file contains detailed information about solicitations. The appeal codes in this file should correspond to the appeal codes in the Donor Transaction History file.

Note: *Please provide as much information in this file as possible. This file is unique in that you can manually edit your appeal information in Fundraiser Performance Management. So, if you are not able to provide some of the fields in the file, such as Appeal Cost or Number Solicited, you can add that information through the software.*

This file should contain one row for each appeal code.

Number	Name	Description	Preferred Format
1	Appeal Code		string/text
2	Appeal Type*+	e.g., email, letter, phone	string/text
3	Drop Date		MM/dd/yyyy
4	Fiscal Year	Fiscal year the appeal was initiated in	yyyy
5	Number Solicited		string/text
6	Appeal Name		string/text
7	Appeal Cost		numeric value

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(+) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 2.3: Appeal Entity **Priority 2**

The Appeal Entity file contains the list entities solicited by each appeal.

Note: *If you are not able to provide this information in the nightly feed, you will still be able to manually upload the appeal solicitation lists through Fundraiser Performance Management.*

This file should contain one row for each appeal code and entity that received the appeal.

Number	Name	Description	Preferred Format
1	Appeal Code	Appeal code that matches back to the Appeal file	string/text
2	Entity ID	ID of the entity solicited by the appeal, which should match back to an ID in the Entity file	string/text

File 3.1a: Activity History — Priority 2

The Activity History file provides the contacts and other activities recorded by all staff at the institution.

The file can contain multiple rows per activity for each constituent and staff involved in the activity. If an activity has multiple staff or entities associated with it, the same Activity ID should be used on each row to link all staff and entities involved in the activity. Each activity should only have one Primary Entity indicated and only one Primary Officer indicated.

Number	Name	Description	Preferred Format
1	Activity ID	Unique ID for the activity	string/text
2	Entity ID	ID of the entity associated with the activity, which corresponds with the Entity file	string/text
3	Staff ID	Staff ID which corresponds with the Staff Information file	string/text
4	Activity Type*+	e.g., Phone, Email, Letter, Visit	string/text
5	Activity Date		MM/dd/yyyy
6	Activity Purpose*	e.g., Ask, Stewardship	string/text
7	Measured Indicator	Indicates the activity helped advance the cultivation process beyond simple notes and casual conversations	1=Yes, 0=No
8	Proposal ID	Unique ID for the proposal related to the activity, if a proposal is linked to the activity	string/text
9	School/Unit*	The school/unit associated with the activity, if applicable (e.g., School of Business, Library, Athletics)	string/text
10	Project of Interest Code*	The project that the activity is associated with or was made in support of	string/text
11	Primary Entity Indicator	Indicates that the entity associated with the activity is the primary person contacted, especially if the activity has multiple entities associated with it	1=Yes, 0=No
12	Primary Officer Indicator	Indicates that the staff member associated with the activity is the primary staff member for the activity, especially if the activity has multiple staff associated with it	1=Yes, 0=No
13	Completed Indicator	Indicates the activity has been completed (i.e., it is not planned or in progress)	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(+) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 3.1b: Activity Details **Priority 2**

The Activity Details file provides the details for the contacts and other activities recorded by all staff at the institution.

Note: *This file should use a double pipe "||" delimiter, regardless of the delimiter used in the other files. This file also supports new line characters in the Description field. The file encoding should be either UTF-8 or ANSI to support special characters in the Description field. The pipe character is the symbol typically found on keyboards on the same key as the backslash "\" symbol near the Enter or Return key.*

The file should contain one row per Activity ID.

Number	Name	Description	Preferred Format
1	Activity ID	Unique ID for the activity	string/text
2	Subject	A short subject of the activity	string/text
3	Description	The full description of the activity	string/text
4	End of Record Indicator	Indicates the end of the activity record for formatting purposes	Y=Yes

File 3.2: Staff Information **Priority 2**

The Staff Information file provides the names of the various staff and volunteers at your institution along with their Staff ID, which is used to match their information to the Staff IDs used in the Activity History, Portfolio Assignments, and Proposal Assignment files. This file should include all current Advancement staff members, officers, and volunteers, as well as any former officers, volunteers, or other staff that are connected to activity/contact, proposal, or portfolio assignment data.

Each staff member should appear only once in the file.

Number	Name	Description	Preferred Format
1	Staff ID	Unique ID of the staff member	string/text
2	First Name		string/text
3	Last Name		string/text
4	Gift Officer Indicator	Indicates the person is or was a gift officer	1=Yes, 0=No
5	Volunteer Indicator	Indicates the person is or was a volunteer (these are typically Alumni who are volunteering on behalf of the institution)	1=Yes, 0=No
6	Active Indicator	Indicates the person is currently associated with the institution (not a former staff member or former volunteer)	1=Yes, 0=No

File 3.3: Prospect Entity **Priority 2**

The Prospect Entity file defines the relationship between Entity IDs and Prospect IDs.

Note: *This file is not required for most database systems. It usually only applies for Advance. This only applies if your system assigns staff to Prospect IDs, and allows you to associate multiple entities with a Prospect ID.*
If this does not apply to your system, do not include the file, and anywhere you see Prospect ID in other files just use the same ID you use for Entity ID.

The file should contain multiple rows per Entity ID for each Prospect ID associated to the individual.

Number	Name	Description	Preferred Format
1	Entity ID	ID of the entity, should match an ID provided in the Entity file	string/text
2	Prospect ID		string/text
3	Primary Prospect Entity ID	Entity ID of the primary entity within a prospect record (between the entity and the spouse and/or additional prospects. If not available, the lowest Entity ID amongst the prospect record will be used (between the entity's Entity ID and the Spouse ID as Primary Prospect Entity ID).	string/text

File 3.4a: Prospect Status — Priority 2

The Prospect Status file is primarily used to indicate whether the prospect record is active.

The file should contain one row per Prospect ID.

Number	Name	Description	Preferred Format
1	Prospect ID	ID of the entity or prospect, should match an ID provided in the Entity file or the Prospect Entity file	string/text
2	Prospect Name		string/text
3	Prospect Status Indicator	Indicator of whether the prospect is currently active or not active	1=Yes, 0=No
4	Prospect Rating*		string/text
5	Current Prospect Stage*+	e.g., Identification, Qualification, Cultivation, Solicitation, Stewardship	string/text
6	Start Date	Date prospect was moved into this stage	MM/dd/yyyy
7	End Date	Date prospect was moved out of this stage	MM/dd/yyyy
8	Prospect Classification*	e.g., Prospect, Suspect, Disqualified, Not a Prospect	string/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(+) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 3.4b: Prospect Stage History **Priority 2**

The Prospect Stage History file is an optional file; it defines the prospect management stages a prospect has been in over time.

The file can contain multiple rows per Prospect ID for each stage change.

Number	Name	Description	Preferred Format
1	Prospect ID	ID of the entity or prospect, should match an ID provided in the Entity file or the Prospect Entity file	string/text
2	Prospect Stage*⁺	e.g., Identification, Qualification, Cultivation, Solicitation, Stewardship	string/text
3	Stage Start Date	Date prospect was moved into this stage	MM/dd/yyyy
4	Stage End Date	Date prospect was moved out of this stage	MM/dd/yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(⁺) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 3.5: Portfolio Assignments — Priority 2

The Portfolio Assignments file defines the current assignments of staff to constituents.

The file can contain multiple rows per Entity ID for each staff assigned to the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID of the entity or prospect, should match an ID provided in the Entity file or the Prospect Entity file	string/text
2	Prospect ID		string/text
3	Staff ID	ID of the staff member assigned to the entity, should match an ID provided in the Staff Information file	string/text
4	Assignment Type*⁺	e.g., Prospect Manager, Primary, Secondary, Volunteer	string/text
5	Active Indicator	Indicates that the assignment of the staff to the prospect is current. Note: Inactive/former assignments should only be included if it is not possible to filter them out.	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(⁺) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 3.6a: Proposal — Priority 2

The Proposal file contains the relevant information that relates proposals to Prospect IDs.

The file should contain multiple rows per Prospect ID for each proposal related to that prospect.

Number	Name	Description	Preferred Format
1	Proposal ID	Unique ID for the proposal	string/text
2	Proposal Name		string/text
3	Prospect ID		string/text
4	Proposal Type*	e.g., Program Support, Scholarships, Unrestricted, Endowment	string/text
5	Proposal Status*⁺	e.g., In Development, Pending, Approved, Declined	string/text
6	Ask Amount	Amount originally requested	numeric value
7	Granted Amount	Actual amount committed	numeric value
8	Active Indicator	Indicates the proposal is active	1=Yes, 0=No
9	Start Date	Date that the proposal was created	MM/dd/yyyy
10	Stop Date	For declined proposals this is the date the proposal was declined (should be included on all inactive proposals)	MM/dd/yyyy
11	Granted Date	Date the proposal was approved/granted (should be included on all approved/granted proposals)	MM/dd/yyyy
12	Target Amount	Target amount of future ask	numeric value
13	Target Ask Date	Future date the ask will be made	MM/dd/yyyy
14	Ask Date	Actual date of solicitation that relates to the ask amount	MM/dd/yyyy
15	Expected Amount	Amount of the proposal that is expected to be granted/committed	numeric value
16	Expected Date	Future date the proposal is expected to close	MM/dd/yyyy
17	Proposal Stage*	Current stage that the proposal is in within the proposal development cycle, if applicable (typically found in Advance databases only)	string/text
18	School/Unit*	The school/unit associated with the proposal, if applicable (e.g., School of Business, Library, Athletics)	string/text
19	Project of Interest Code*	The individual initiative that the proposal is associated with or was made in support of	string/text
20	Proposal Funding Type*	Indicates the gift funding type of the proposal	string/text
21	Campaign Project Code*	Indicates which capital campaign project the proposal should be associated with	String/text

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(⁺) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 3.6b: Proposal Comments **Priority 2**

The Proposal Comments file is an optional file; it provides a place to record an additional comment or notes related to a proposal.

Note: *This file should use a double pipe "||" delimiter, regardless of the delimiter used in the other files. This file also supports new line characters in the Description field. The file encoding should be either UTF-8 or ANSI to support special characters in the Description field. The pipe character is the symbol typically found on keyboards on the same key as the backslash "\" symbol near the Enter or Return key.*

The file should contain one row per Proposal ID.

Number	Name	Description	Preferred Format
1	Proposal ID	Unique ID for the proposal	string/text
2	Comment	Comment or notes related to the proposal	string/text
3	End of Record Indicator	Indicates the end of the comment record for formatting purposes	Y=Yes

File 3.7: Proposal Assignment **Priority 2**

The Proposal Assignment file contains the link between the Proposal file and the staff responsible for the proposal.

The file should contain multiple rows per Proposal ID for each staff associated with the proposal. Each proposal should be associated with only one primary staff.

Number	Name	Description	Preferred Format
1	Proposal ID	ID of the proposal, should match an ID provided in the Proposal file	string/text
2	Staff ID	ID of the staff member assigned to the proposal, should match an ID provided in the Staff Information file	string/text
3	Proposal Assignment Type*+	e.g., primary, non-primary	string/text
4	Active Indicator	Indicates the proposal continues to be associated with the staff	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1
(+) indicates that you will also map your codes within Fundraiser Performance Management to common definitions that are used across the Community Network

File 4.1: Code Translation Table **Priority 1**

The Code Translation Table defines the codes used in the files your institution is providing.

Number	Name	Description	Preferred Format
1	File Name	e.g., Entity, Donor Transaction History, Activity History	string/text
2	Field Name	e.g., Marital Status, Address Type, Contact Purpose	string/text
3	Customer Code	e.g., AL, CP, FR	string/text
4	Customer Definition	e.g., Alumna/us, Current Parent, Friend	string/text

The Customer Specific Codes file contains any additional scores or values your institution would like to include. For example, perhaps your institution has created an internal scoring system, or previously had a wealth screening done on some of your prospects. For Blackbaud scores (e.g., Target Analytics scores) please speak to your Business Consultant, Principal before sending this file.

If providing more than one score, please use separate files for each score. For example, if an affinity rating and a wealth screening are being provided, affinity ratings would be included in “CustomerSpecificCodes_Affinity” and wealth screening included in “CustomerSpecificCodes_Wealth”. The number of different types of scores is limited to five.

The file can contain multiple rows for each Entity ID if the entity has more than one rating or classification.

Number	Name	Description	Preferred Format
1	Entity ID		string/text
2	Score*		string/text
3	Score date	Date the score was appended or generated	MM/dd/yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table File 4.1

File 4.3: Social Media Links **Priority 3**

The Social Media Links file is an optional file; it provides links to social media sites (Facebook, Twitter, and LinkedIn) for each constituent.

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

Number	Name	Description	Preferred Format
1	Entity ID		string/text
2	Facebook	Full link to this social media site formatted as http://...	string/text
3	Twitter	Full link to this social media site formatted as http://...	string/text
4	LinkedIn	Full link to this social media site formatted as http://...	string/text

File 4.4: Web Addresses **Priority 3**

The Web Addresses file is an optional file; it provides links to websites associated with a constituent.

The file may contain multiple rows per entity if the entity is associated with more than one website.

Number	Name	Description	Preferred Format
1	Entity ID		string/text
2	Link Text	The visible, clickable text for this hyperlink	string/text
3	URL	Full link to this website formatted as http://...	string/text

Appendix: Data Request Guide Version Changes Tracking (versus 2018.3 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 - Field	Associated Entities	Associated Entity Name	Changed name of field from Associated Name to Associated Entity Name to keep it consistent with the names of other fields in the file.
2	Update - Field	Associated Entities	Associated Entity School of Graduation	Changed name of field from School of Graduation to Associated Entity School of Graduation to clarify what data is expected in that field.
3	Update -Field	Associated Entities	Associated Entity Class Year	Changed name of field from Class Year to Associated Entity Class Year to clarify what data is expected in that field.
4	Add - Field	Donor Transaction History	Pledge Balance	Added optional field to track remaining balance on pledge transactions.
5	Add - Field	Donor Transaction History	Pledge Status	Added optional field to track status of pledge transactions.
6	Update - File	Portfolio Assignments	N/A	Changed name of file from Assignment History to Portfolio Assignments, and updated description to emphasize sending current portfolio assignments rather than history of assignments.
7	Add - Field	Activity History	Completed Indicator	Added new field which can be used to map data to the Contact Report Status field on a Contact Report.
8	Update - Field	Activity Details	End of Record Indicator	Changed name of field from Completed Indicator to End or Record Indicator to clarify the purpose of that field and the static value that is expected.
9	Add - File	Prospect Stage History	N/A	Added new file to track history of prospect stage changes.
10	Add - File	Proposal Comments	N/A	Added new file to capture comments/notes associated with proposal records.
11	Add - File	Web Addresses	N/A	Added new file to capture web addresses associated with entity records.