

Blackbaud Guided Fundraising™

FILE EXPORT GUIDE

VERSION 2018.3

Overview

The Blackbaud Guided Fundraising (formerly OneAppeal) File Export Guide is designed to provide you with information on the output files created for you as a part of your Blackbaud Guided Fundraising subscription.

Nightly File Export

As a part of your subscription, you receive data files containing your agent call history data and your constituent profile update, donation, and pledge card request data entered by your agents through Blackbaud Guided Fundraising. 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 files for the Reeher Platform, and is updated at the same time that we process your nightly data files.

File Format

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

Naming Conventions

The exported files are named `guided_fundraising_agent_call_logs_2018_3.txt`, `guided_fundraising_profile_updates_2018_3.txt`, `guided_fundraising_donations_2018_3.txt`, `guided_fundraising_pledge_card_requests_2018_3.txt`.

File 1: Guided Fundraising Agent Call Logs

This file contains your agent call history data. Agents and entities can show up multiple times in the file for each call they are associated with.

Number	Name	Description	Format
1	Agent Call Log ID	Unique reference ID of the call	string/text
2	Date	Date/time	YYYY-MM-DD hh:mm:ss
3	Agent ID	ID of the agent that placed related to the call	string/text
4	Agent First Name		string/text
5	Agent Last Name		string/text
6	Entity ID	ID of the entity related to the call	string/text
7	Entity First Name		string/text
8	Entity Last Name		string/text
9	Result	Result of the call (e.g. Callback, Specified Pledge, Not Available, Answering Machine, etc.)	string/text
10	Notes	Notes related to the call	string/text
11	Call Duration (seconds)		numeric value

File 2: Guided Fundraising Profile Updates

This file contains all constituent profile data updates entered by your agents through Blackbaud Guided Fundraising. Entities can show up multiple times in the file for each field updated in their profile.

Number	Name	Description	Format
1	Profile Update ID	Unique reference ID of the profile update	string/text
2	Entity ID	ID of the entity related to the call	string/text
3	Entity First Name		string/text
4	Entity Last Name		string/text
5	Agent ID	ID of the agent related to the call	string/text
6	Agent First Name		string/text
7	Agent Last Name		string/text
8	Date of Request	Date/time	YYYY-MM-DD hh:mm:ss
9	Additional Info		string/text
10	Field	The name of the field getting updated data	string/text
11	Old Value	The entity's previous value that was edited by the agent	string/text
12	New Value	The updated field value entered by the agent	string/text

File 3: Guided Fundraising Donations

This file contains all donations entered by your agents through Blackbaud Guided Fundraising.

Number	Name	Description	Format
1	Donation ID	Unique reference ID of the donation	string/text
2	Entity ID	ID of the entity related to the call	string/text
3	Entity First Name		string/text
4	Entity Last Name		string/text
5	Agent ID	ID of the agent that placed the call	string/text
6	Agent First Name		string/text
7	Agent Last Name		string/text
8	Type	Donation payment method (e.g. Pledge- Mail, Pledge- Online, Credit Card, Other)	string/text
9	Date	Date/time	YYYY-MM-DD hh:mm:ss
10	Amount	Total amount of the donation	numeric value
11	Recurrence	Donation payment frequency (e.g. Monthly, Yearly)	string/text
12	Matching Gift	Indicates whether the donor's employer has a matching gift program (e.g. Yes, No, Not Sure)	string/text
13	Matching Gift Amount	Total amount of the matching gift	numeric value
14	Company Name	Donor's employer	string/text
15	Additional Info		string/text
16	Designation 1 Amount		numeric value
17	Designation 1 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
18	Designation 1 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
19	Designation 2 Amount		numeric value
20	Designation 2 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
21	Designation 2 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
22	Designation 3 Amount		numeric value
23	Designation 3 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
24	Designation 3 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
25	Designation 4 Amount		numeric value
26	Designation 4 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
27	Designation 4 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
28	Designation 5 Amount		numeric value
29	Designation 5 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
30	Designation 5 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text

File 4: Guided Fundraising Pledge Card Requests

This file contains all mail pledge card requests entered by your agents through Blackbaud Guided Fundraising.

Number	Name	Description	Format
1	Pledge Card Request ID	Unique reference ID of the pledge card request	string/text
2	Entity ID	ID of the entity related to the call	string/text
3	Entity First Name		string/text
4	Entity Last Name		string/text
5	Agent ID	ID of the agent that placed the call	string/text
6	Agent First Name		string/text
7	Agent Last Name		string/text
8	Date	Date/time	YYYY-MM-DD hh:mm:ss
9	Amount	Total amount of the donation	numeric value
10	Address Line 1		string/text
11	Address Line 2		string/text
12	City		string/text
13	State		string/text
14	Zip		string/text
15	Address Updated	Yes = Address was updated by the agent, No = Address was not updated by the agent (address on file was used)	Yes/No
16	Designation 1 Amount		numeric value
17	Designation 1 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
18	Designation 1 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
19	Designation 2 Amount		numeric value
20	Designation 2 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
21	Designation 2 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
22	Designation 3 Amount		numeric value
23	Designation 3 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
24	Designation 3 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
25	Designation 4 Amount		numeric value
26	Designation 4 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
27	Designation 4 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text
28	Designation 5 Amount		numeric value
29	Designation 5 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
30	Designation 5 Code	This will be blank if the Agent chooses "Other" designation when entering a donation and edits the free text field.	string/text

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

This table contains all export 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 update to reflect the name change from OneAppeal to Blackbaud Guided Fundraising as well as the updated version
2	Update	Profile Updates	Field	Added 6 additional field options; for example, “Mailing Address”, “Home Address Line 1”
3	Update	Donations	Type	Updated pledge donations to specify if “Pledge- Mail” or “Pledge- Online”
4	Update	Donations	Designation X Code	Updated field name from “Designation X” to distinguish between designation code and designation description; contains your designation codes when available, otherwise will be blank if the Agent chooses “Other” designation when entering a donation and edits the free text field.
5	Add	Donations	Designation X Description	Contains corresponding descriptions for your Designation Codes or contains the Agent’s free text entry if they choose “Other” designation when entering a donation.
6	Update	Pledge Card Requests	Designation X Code	Updated field name from “Designation X” to distinguish between designation code and designation description; contains your designation codes when available, otherwise will be blank if the Agent chooses “Other” designation when entering a donation and edits the free text field.
7	Add	Pledge Card Requests	Designation X Description	Contains corresponding descriptions for your Designation Codes or contains the Agent’s free text entry if they choose “Other” designation when entering a donation.