Blackbaud Guided Fundraising™

FILE EXPORT GUIDE
VERSION 2019.1

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 Fundraiser Performance Management, 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_2019_1.txt, guided_fundraising_profile_updates_2019_1.txt, guided_fundraising_donations_2019_1.txt, guided_fundraising_pledge_card_requests_2019_1.txt, guided_fundraising_web_donations_2019_1.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
12	Phone Number	Phone number used to place call (this field will display the numeric portion of the number without any special formatting characters)	string/text

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 Phone Donations

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

Number	Name	Description	Format
1	Phone Donation ID	Unique reference ID of the phone 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

File 5: Guided Fundraising Web Donations

This file contains all donations entered submitted through a Blackbaud Guided Fundraising donation page.

Number	Name	Description	Format
1	Web Donation ID	Unique reference ID of the web donation	string/text
2	Phone Donation ID	Matches Phone Donation ID in file 3 if donation link is followed by entity	string/text
3	Entity ID	ID of the entity related to the donation (if known)	string/text
4	Entity First Name		string/text
5	Entity Last Name		string/text
6	Address Line 1		string/text
7	Address Line 2		string/text
8	City		string/text
9	State		string/text
10	Zip		string/text
11	Type	Donation payment method	string/text
12	Date	Date/time	YYYY-MM-DD hh:mm:ss
13	Amount	Total amount of the donation	numeric value
14	Recurrence	Donation payment frequency (e.g. Monthly, Yearly)	string/text
15	Anonymous Gift Indicator	Indicates the donor wishes to remain anonymous	Yes or No
16	In Honor/Memory Of Gift Indicator	Indicates the donation was made in honor/memory	Yes or No
17	In Honor/Memory Of		string/text
18	Designation 1 Amount		numeric value
19	Designation 1 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
20	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
21	Designation 2 Amount		numeric value
22	Designation 2 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
23	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
24	Designation 3 Amount		numeric value
25	Designation 3 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
26	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
27	Designation 4 Amount		numeric value
28	Designation 4 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
29	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
30	Designation 5 Amount		numeric value
31	Designation 5 Description	e.g. XYZ Scholarship, ABC Fund, etc.	string/text
32	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 2018.4 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	Guided Fundraising Phone Donations	File Name	File name updated from "Guided Fundraising Donations" to "Guided Fundraising Phone Donations" to differentiate from the new file "Guided Fundraising Web Donations"
2	Update	Guided Fundraising Phone Donations	Phone Donation ID	Field name updated from "Donation ID" to "Phone Donation ID" to differentiate from "Web Donation ID" in the new file "Guided Fundraising Web Donations"
3	Add	Guided Fundraising Web Donations	N/A	New file containing all donations entered on the donation page.