Blackbaud Volunteer Network Fundraising™

Data Request Guide

Version 2018.3

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* The full Reeher Platform includes some files that are not required for Blackbaud Volunteer Network Fundraising, which is why some file numbers are skipped

Overview

The Blackbaud Volunteer Network Fundraising (formerly Class Agent) Data Request Guide is designed to provide you with guidelines for setting up your institution's nightly data feed. We understand that your institution may not track all requested fields, or may track some information differently than outlined in this document. Please contact Reeher Support if you would like to discuss alternative methods for extracting the data.

Automated Nightly File Transfer

As part of setting up Blackbaud Volunteer Network Fundraising, 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 involves two steps.

1. The nightly extract is set up by creating a number of 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 our 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 we will provide a username and password for you to access your institution's folder on the server. We also supports the use of SSH keys, or public keys, as a means of authentication for the SFTP.

This process is straightforward and our Customer Care team will help to establish this process if you do not have something currently in place.

File Format

We request that each file be prepared in a tab delimited text file. Comma separated values (csv) format is also acceptable. All files should include column headers. If you are using the csv format, use double quote enclosures for any fields containing commas.

Naming Conventions

Please title the files with the appropriate name corresponding to this document. For example, the entity file should be named "Entity" and should not include a date stamp or other information that would change the naming of the file on a daily basis. If splitting a file into multiple files, please name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, etc.).

File Priorities in Implementation

During an institution's initial implementation of Blackbaud Volunteer Network Fundraising, to best organize the work and manage the timeline, the data files found in this Data Request Guide are broken down by the following priority groups. The Priority 1 Files will help us with validating your dollar and donor counts along with looking at all of your constituents. 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 3.2: Staff Information	File 1.7: Athletics
File 2.1: Donor Transaction History	File 3.3: Prospect Entity	File 1.8: Associated Entities
File 1.2a: Addresses	File 3.5: Assignment History	File 4.2: Customer Specific Codes
File 1.2c: Phones		File 4.3: Social Media Links
File 1.3: Degrees		
File 1.5a: Participation History		
File 1.6: Contact Restrictions		
File 4.1: Code Translation Table		

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 or not 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., etc.	string/text
10	Suffix	e.g. M.D., Ph.D., etc.	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, etc.	string/text
15	Primary Relationship Type*+	e.g. alumni, friend, parent, etc.	string/text
16	Preferred Class Year		yyyy
17	Gender*		string/text
18	Spouse Name	Spouse's full name including any Prefix and/or Suffix	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, Reeher will use lowest Entity ID between the entity's Entity ID and the Spouse ID 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	string/text
28	Planned Giving Indicator	Indicators 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 Blackbaud Volunteer Network Fundraising to common definitions that are used across the Reeher Community

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, etc.	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 the Platform 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 1.2c: 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 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		string/text
3	Phone Type*	e.g. Home, Business, Mobile, etc.	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 of 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 1.5a: 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, etc.

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, etc.	string/text
3	Activity Name*	e.g. President's Dinner, Alumni Association Committee,	string/text
4	Activity Role*	e.g. Chair, Attendee, President, etc.	string/text
5	Activity Status*	e.g. Active, Inactive, Current, Former, etc.	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 1.6: 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*		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. Any non-NCAA or intramural athletics should be recorded in the Participation History file.

This should include all athletics activities.

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

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, etc.	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 is an optional file; it should provide us with all associations between your constituents, including spouses, parents, children, siblings, co-workers, etc.

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		string/text
3	Associated Name	Name of the associated entity	string/text
4	Associated Relationship Type*+	e.g. spouse, parent, child, sibling, co-worker, etc. 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	School of Graduation*	School of graduation of the associated entity, if available	string/text
6	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 Blackbaud Volunteer Network Fundraising to common definitions that are used across the Reeher Community

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 in order 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, etc. (should use the corresponding codes in this file)	string/text
14	Designation School/Unit*	e.g. School of Business, Library, Athletics, etc. (should use the corresponding codes in this file)	string/text
15	Designation Purpose*	e.g. Endowment, Unrestricted, Research, etc. (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

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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 Assignment History file.

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 a gift officer.	1=Yes, 0=No
5	Volunteer Indicator	Indicates the person is 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 back to 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, Reeher will use lowest Entity ID amongst the prospect record (between the entity's Entity ID and the Spouse ID as Primary Prospect Entity ID).	string/text

File 3.5: Assignment History **Priority 2**

The Assignment History file defines the assignments of staff to constituents over time.

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 assigned. Should match back to an ID provided in the Entity file.	string/text
2	Prospect ID		string/text
3	Staff ID	ID of the staff member assigned to the entity. Should match back to 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	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 Blackbaud Volunteer Network Fundraising to common definitions that are used across the Reeher Community

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

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

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

File 4.2: Customer Specific Codes — Priority 3

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.

If providing more than one score, please use separate files for each score. For example, if an affinity rating and a wealth screening is being provided, affinity ratings would be included in "CustomerSpecificCodes_Affinity" and wealth screening would be included in "CustomerSpecificCodes_Wealth". The number of different types of scores is limited to two (2).

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.

Note: *Volunteers will only be able to see links to Facebook; staff will be able to see all three links, if provided.*

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

Appendix: Data Request Guide Version Changes Tracking (versus 2017.4 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	Delete	Entity	Mobile Phone	Mobile phone should now be provided in the new 1.2c Phones file. See related change #4 below.
2	Add	Entity	Outstanding Pledge Amount	Added new field to display an entity's outstanding pledge balance on their Relationship Profile.
3	Delete	Addresses	Phone	Phone should now be provided in the new 1.2c Phones file. See related change #4 below.
4	Add	Phones	n/a	Added new phones file to capture all phone number information in a single file and decouple from addresses. See related changes #1 & #3 above.
5	Update	Donor Transaction History	Campaign Project Code	Field #9 Campaign Project Code used to be called "Campaign Code". Has been updated to request campaign projects, which are a sub-level to campaigns.