

# Convio Standard DataSync Specification Sheet

Document TS-03-General

## Definitions:

*Client* refers to the purchasing organization, as defined in the **Convio Order Form**.

**Convio Standard DataSync:** The Convio Standard DataSync is a combination of software and services that deliver the following benefits:

- Two-way exchange of constituent data between the Convio Constituent360 database and the Client's fundraising database
- One-way export of itemized gift data from Convio
- Reference file of unsynced transactions that do not meet the criteria to be included in the gift export file
- Upload of group/segment data from the Client's fundraising database into the Constituent360 database
- Administrative user interface for managing DataSync process execution
- Administrative user interface for maintenance and configuration of cross-reference definitions used in gift export process (See Convio DataSync FAQ for further details)
- Duplicate management processes and administrative user interfaces
- Built-in error handling and collision detection
- Archival of import/export data sets
- Integrated reporting of all DataSync process results
- Scheduling interface to allow automation of Convio DataSync processes\*

Note: Please review the Convio DataSync FAQ regarding organization records, household information, relationship tracking, spouse information and limitations surrounding the upload of gift data into the Convio Constituent360 database.

\* Full automation of the Convio Standard DataSync is dependent upon the Client's ability to automate the following:

- The import/export functions of their fundraising database
- A set of FTP processes to manage the transfer of data files between the Client's systems and the Convio Application Services

**Convio Responsibilities:** Convio will work collectively with the Client to configure the Convio Standard DataSync. The Convio Standard DataSync will enable the exchange of constituent and gift data between Convio and a **single instance** of the Client's fundraising database.

**Fields Included in Convio Standard DataSync:** The data fields exchanged via the Convio Standard DataSync are restricted to the set of fields outlined on a case by case basis as follows:

- Data Synchronization of Constituent Records – Exhibit 1 (maximum 2 files comprising new and updated profiles)
- Export of Gift Records – Exhibit 2 (maximum 1 file)
- Export of Unsynced Transactions – Exhibit 3 (maximum 1 file)
- Upload of Group/Interest Category Assignments – Exhibit 4

Clients may exchange all or part of the set of fields identified in the Exhibits section of this document but only those fields identified in the Exhibits section.

**Note About Required System Fields:** Any system fields required by the Client's fundraising database import/export utilities but not explicitly listed in the Exhibits can be added to the Client's definition of the Convio Standard DataSync. Examples of such fields include supplementary constituent record ID's, import/export ID's and origin codes.

**Format of Comma Separated Value (CSV) DataSync Files:** All data synchronization will occur through the transfer of CSV files on a batch basis. The data fields in the CSV files will be restricted to all or part of the fields identified in Exhibits 1-4 (including any system fields identified as required by the Client's fundraising database import/export utilities) and will use a header format specified by the Client. It is strongly recommended that the header specification be developed in accordance with the requirements of the Client's fundraising database import/export utilities.

**Configuration of Convio Constituent Application Service:** Convio will perform all necessary configuration work within the Convio Application Service and Constituent360 database to produce and accept the exchange files containing all or part of the data fields identified in Exhibits 1, 2,3, and 4 of Convio document TS-03. The set of configuration tasks includes and is limited to the following:

1. Enable selected fields in the Constituent360 database
2. Configure up to three cross-references for the DataSync gift export process
3. Implement constituent import/export DataSync operation
4. Implement gift export DataSync operation
5. Implement unsynced transaction DataSync operation
6. Configure Convio administrative user interfaces
7. Configure DataSync process scheduling and automation routines

**Training:** Convio will provide training to the Client's selected DataSync operator(s).

**Documentation:** Convio will deliver (1) a set of mapping documents detailing the finalized version of the data exchange files; and (2) a basic guide covering how to submit a DataSync operation and interpret its results.

**Client Responsibilities:** The Client's responsibilities are as follows:

1. Select the set of constituent and gift fields to be included in the data exchange files. The selected fields may include all or part of the sets of fields identified in this document.
2. Identify any further system fields required by the Client fundraising database import/export utilities.
3. Determine the headers to be used in the data transfer CSV files.
4. Execute DataSync testing and verification in conjunction with Convio.
5. Designate DataSync operator(s) and make available for training.

**Client Responsiveness Expectations:** A successful DataSync project requires that clients remain responsive throughout the course of the project. In this regard, Convio expects the following:

1. Acknowledgement of all Convio communications within 3 business days
2. Delivery of sample upload file within 5 days of mapping sign-off
3. Evaluation and testing of all Convio-generated test files within 5 business days
4. Completion of cross-reference setup within 5 business days of training in cross-reference utility
5. Merging of duplicates at a rate of 500 per week

**Exhibit 1 – Data Synchronization of Constituent Records**

| Field Description        | Export from Client DB/Upload to Convio | Download from Convio / Import into Client DB | Notes  |
|--------------------------|--|--|--|
| <b>Biographical Data</b> |  |  |  |
| Constituent ID           | Yes                                    | Yes  | Client database assigned Constituent Record ID           |
| Convio ID                | Yes                                    | Yes  | Convio assigned Constituent Record ID                    |
| Title                    | Yes                                    | Yes  |  |
| First Name               | Yes                                    | Yes  |  |
| Middle Name              | Yes                                    | Yes  |  |
| Last Name                | Yes                                    | Yes  |  |
| Nickname                 | Yes                                    | Yes  |  |
| Suffix 1                 | Yes                                    | Yes  |  |
| Suffix 2                 | Yes                                    | Yes  |  |
| Informal Salutation      | Yes                                    | Yes  |  |
| Formal Salutation        | Yes                                    | Yes  |  |
| Religion                 | Yes                                    | Yes  |  |
| Ethnicity                | Yes                                    | Yes  |  |
| Marital Status           | Yes                                    | Yes  |  |
| Gender                   | Yes                                    | Yes  | Male/ Female   |
| Birthday                 | Yes                                    | Yes  |  |
| Accepts Email            | Yes                                    | Yes  |  |
| Deceased                 | Yes                                    | Yes  |  |
| Accepts Postal Mail      | Yes                                    | Yes  | Constituent indicates willingness to receive postal mail |
| Address Type             | Yes                                    | Yes  | Client defined value                                     |
| Address Street1          | Yes                                    | Yes  | Constituent entered Street 1                             |
| Address Street2          | Yes                                    | Yes  | Constituent entered Street 2                             |

|                                  |     |     |   |
|----------------------------------|-----|-----|---|
| Address Street3                  | Yes | Yes | Constituent entered Street 3                            |
| Address City                     | Yes | Yes | Constituent entered City                                |
| Address State/Province           | Yes | Yes | Constituent entered State/Province                      |
| Address Zip                      | Yes | Yes | Constituent entered Zip Code                            |
| Address Country                  | Yes | Yes | Constituent entered Country                             |
| Address Info Source              | No  | Yes | For new records, indicates address originated in Convio |
| Corrected Address Street1        | Yes | Yes | Address corrected Constituent Street1                   |
| Corrected Address Street2        | Yes | Yes | Address corrected Constituent Street2                   |
| Corrected Address Street3        | Yes | Yes | Address corrected Constituent Street3                   |
| Corrected Address City           | Yes | Yes | Address corrected Constituent City                      |
| Corrected Address State/Province | Yes | Yes | Address corrected Constituent State/Province            |
| Corrected Address Zip+4          | Yes | Yes | Address corrected Constituent Zip +4                    |
| Corrected Address Country        | Yes | Yes | Address corrected Constituent Country                   |
| Email Address                    | Yes | Yes |   |
| Email Status                     | No  | Yes | Good, Soft Bounce, Hard Bounce, Unknown                 |
| Spouse Title                     | Yes | Yes |   |
| Spouse First Name                | Yes | Yes |   |
| Spouse Middle Name               | Yes | Yes |   |
| Spouse Last Name                 | Yes | Yes |   |
| Home Phone Number                | Yes | Yes |   |
| Work Phone Number                | Yes | Yes |   |

|                                  |     |     |   |
|----------------------------------|-----|-----|---|
| Mobile Phone Number              | Yes | Yes |   |
| Employer/Organization Name       | Yes | Yes |   |
| Occupation                       | Yes | Yes |   |
| <b>Summary Donor Information</b> |     |     |   |
| DataSync Date                    | No  | Yes | Indicates date of last DataSync operation that resulted in export of record from Convio |
| First Gift Date                  | Yes | No  |   |
| First Gift Amount                | Yes | No  |   |
| Largest Gift Date                | Yes | No  |   |
| Largest Gift Amount              | Yes | No  |   |
| Last Gift Date                   | Yes | No  |   |
| Last Gift Amount                 | Yes | No  |   |
| Lifetime Total Amount            | Yes | No  |   |
| Lifetime Total Count             | Yes | No  |   |
| Calendar YTD Amount              | Yes | No  |   |
| Calendar YTD Count               | Yes | No  |   |

| Membership Information                   |     |     |   |
|--|-----|-----|---|
| Membership ID                            | Yes | Yes |   |
| Membership Status                        | Yes | Yes |   |
| Membership Level ID                      | Yes | Yes | Must be cross-referenced to Convio defined membership level   |
| Member Since Date                        | Yes | Yes |   |
| Membership Expiration Date               | Yes | Yes |   |
| Last Membership Renewal Date             | Yes | Yes |   |
| Up to 5 Client Defined String Attributes |     |     |   |
| User Defined STRING1                     | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom string attributes in the Convio Application Suite |
| User Defined STRING2                     | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom string attributes in the Convio Application Suite |
| User Defined STRING3                     | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom string attributes in the Convio Application Suite |
| User Defined STRING4                     | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom string attributes in the Convio Application Suite |
| User Defined STRING5                     | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom string attributes in the Convio Application Suite |
| One Client Defined Date Attribute        |     |     |   |
| User Defined DATE1                       | Yes | Yes | Please see Convio DataSync FAQ for details regarding availability of custom date attributes in the Convio Application Suite   |

**Exhibit 2 – Export of Gift Records**

| Export of Gift Records |   |        |
|------------------------|---|--------|
| Field                  | Description                             | Values |
| Constituent ID         | Client database assigned Constituent ID |        |
| Convio ID              | Convio assigned Constituent ID          |        |
| First Name             | Constituent First Name                  |        |
| Middle Name            | Constituent Middle Name                 |        |
| Last Name              | Constituent Last Name                   |        |
| Address Street1        | Constituent Street 1                    |        |
| Address Street2        | Constituent Street 2                    |        |
| Address Street3        | Constituent Street 3                    |        |
| Address City           | Constituent City                        |        |
| Address State/Province | Constituent State/Province              |        |
| Address Zip            | Constituent Zip                         |        |
| Address Country        | Constituent Country                     |        |
| Billing First Name     | Billing First Name                      |        |
| Billing Middle Name    | Billing Middle Name                     |        |
| Billing Last Name      | Billing Last Name                       |        |
| Billing Street1        | Billing Street 1                        |        |
| Billing Street2        | Billing Street 2                        |        |
| Billing City           | Billing City                            |        |
| Billing State/Province | Billing State/Province                  |        |
| Billing Zip            | Billing Zip                             |        |
| Billing Country        | Billing Country                         |        |

|                                     |  |  |
|-------------------------------------|--|--|
| Gift Transaction ID                 | Unique Convio Transaction ID   |  |
| Gift Type                           | Indicates Gift Type  | "Donation", "Sustaining Gift", "Honor", "Memorial", "E-Commerce", "TeamRaiser Registration", "Ticket Purchase" |
| Gift Amount                         | Amount of gift   | Formatted per Client specification   |
| Gift Date                           | Date of Donation   | Formatted per Client specification   |
| Tax Deductible Value                | Tax deductible value of gift after accounting for goods or services  |  |
| Fair Market Value of Goods/Services | Fair market value of any goods or services exchanged for the gift  |  |
| Convio Campaign Name                | Name of Convio Donation Campaign   |  |
| Convio Campaign ID                  | ID of Convio Donation Campaign   |  |
| Convio Event Name                   | Name of Convio Ticketed Event  |  |
| Convio Event ID                     | ID of Convio Ticketed Event  |  |
| Convio TeamRaiser Name              | Name of Convio TeamRaiser Event  |  |
| Convio TeamRaiser ID                | ID of Convio TeamRaiser Event  |  |
| Ecommerce Store Name                | Name of Convio Ecommerce Store   |  |
| Ecommerce Store ID                  | ID of Convio Ecommerce Store   |  |
| Campaign ID                         | ID of offline database campaign gift will be assigned to. Determined based upon configured Convio cross-references | Selected from Client maintained look-up table  |
| Fund ID                             | ID of offline database fund gift will be assigned to. Determined based upon configured Convio cross-references     | Selected from Client maintained look-up table  |
| Appeal ID                           | ID of offline database appeal gift will be assigned to. Determined based upon configured Convio cross-references   | Selected from Client maintained look-up table  |
| Gift Confirmation Code              | Reference - set to Convio provided User Confirmation Code  |  |
| Tender Type                         | Tender used for gift   | "Credit Card"  |
| Credit Card Type                    | Type of credit card  | "Visa" "MasterCard" "Amex" "Discover"  |

|                                    |   |   |
|------------------------------------|---|---|
| Credit Card Number                 | First and last four digits of card number   |   |
| Anonymous Gift                     | Did donor indicate anonymous gift   | TRUE/FALSE  |
| Joint Gift Name                    | Name provided for a joint gift  | Donor Provided  |
| Gift Source                        | Indicates gift originated on website  | "Online"  |
| Batch Settlement Number            | Identifies the batch in which the gift was settled  |   |
| Settlement Date                    | Date transaction was settled by payment processing gateway  |   |
| Merchant Account ID                | Processing merchant account   |   |
| <b>Matching Gift Information</b>   |   |   |
| Matching Gift Company Name         | Name of donor selected company for matching gift  | Either donor provided or donor selected from look-up database |
| Matching Gift Company Status       | True if donor found company in matching gift database, otherwise false                                      | TRUE/FALSE  |
| <b>Sustaining Gift Information</b> |   |   |
| Original Gift ID                   | Transaction ID for first payment of sustainer gift. This value will be exported for all subsequent payments |   |
| Sustainer Gift Frequency           | Frequency of sustaining gift  | "Monthly", "Quarterly", "Annual"                              |
| Number of Sustainer Payments       | Indicates number of payments included in donor gift   | 2, 6, 12... 0 if no limit specified on number of payments     |
| Payment Number                     | Increments for each sustaining gift payment   | 1, 2, 3...  |

| Honor/Memorial Gift Information |  |   |
|---------------------------------|--|---|
| Honor/Memorial Type             | Indicates if this is an Honor or Memorial gift                   | "Honor", "Memorial"   |
| Honoree Title                   | Title of Honor/memorial Honoree                                  | Honoree Title   |
| Honoree First Name              | First Name of Honor/memorial Honoree                             | Honoree First Name  |
| Honoree Last Name               | Last Name of Honor/memorial Honoree                              | Honoree Last Name   |
| Provide Notification            | If true, notification of gift needs to be provided               | TRUE/FALSE  |
| Notifree Title                  | Title of person to notify regarding honor/memorial gift          | Notification Recipient Title                                  |
| Notifree First Name             | First Name of person to notify regarding honor/memorial gift     | Notification Recipient First Name                             |
| Notifree Last Name              | Last Name of person to notify regarding honor/memorial gift      | Notification Recipient Last Name                              |
| Notifree Address Line 1         | Address Line 1 of person to notify regarding honor/memorial gift | Notification Recipient Address 1                              |
| Notifree Address Line 2         | Address Line 2 of person to notify regarding honor/memorial gift | Notification Recipient Address 2                              |
| Notifree Address City           | Address City of person to notify regarding honor/memorial gift   | Notification Recipient City                                   |
| Notifree Address State          | Address State of person to notify regarding honor/memorial gift  | Notification Recipient State                                  |
| Notifree Address Zip            | Address Zip of person to notify regarding honor/memorial gift    | Notification Recipient Zip                                    |
| Gift Message                    | Honor/Memorial message provided by donor                         | <Message Body> /n /n <Message Closing> /n <Message Signature> |

**Exhibit 3 – Export of Unsynced Transactions**

| Unsynced Transactions  |  |
|------------------------|--|
| Field                  | Field Description  |
| Constituent ID         | Client database assigned Constituent ID  |
| Convio ID              | Convio assigned Constituent ID   |
| First Name             | Constituent First Name   |
| Last Name              | Constituent Last Name  |
| Primary Email          | Constituent Email Address  |
| Transaction Type       | "Donation", "Sustaining Gift", "Honor", "Memorial", "E-Commerce", "TeamRaiser Registration", "Ticket Purchase" |
| Transaction Date       | Formatted per client specification   |
| Transaction Amount     | Formatted per client specification   |
| User Confirmation Code | Unique identifier of transaction   |
| Reason                 | Reason that gift was excluded from gift export   |

**Exhibit 4 – Upload of Group/Interest Category Assignments**

| <b>Group Assignment</b>      |   |
|------------------------------|---|
| <b>Field</b>                 | <b>Field Description</b>                                    |
| Constituent Identifier       | Constituent email address or Constituent ID                 |
| Group Identifier             | Convio Group ID or Cross-Referenced External ID             |
| <b>Interest Assignment</b>   |   |
| <b>Field</b>                 | <b>Field Description</b>                                    |
| Constituent Identifier       | Constituent email address or Constituent ID                 |
| Interest Category Identifier | Convio Interest Category ID or Cross-Referenced External ID |