

Convio Standard DataSync Specification Sheet

Document TS-03-MPX

Definitions:

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

Convio Standard DataSync: The Convio Standard DataSync with MPX 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 MPX 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 MPX into the Constituent360 database
- Administrative user interface for managing DataSync process execution
- Administrative user interface for maintenance and configuration of cross-reference definitions (e.g., values for Source Codes) used in gift export process.
- 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, gift and eCommerce data between Convio and a **single instance** of MPX.

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

- Constituent Import to Convio – Exhibit 1
- Constituent Export from Convio – Exhibit 2
- Gift Download File – Exhibit 3
- eCommerce Downloads – Exhibit 4
- Export of Unsynced Transactions – Exhibit 5 (maximum of 1 file)
- Upload of Group/Interest Category Assignments – Exhibit 6

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 MPX 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 IDs, and additional import/export ID's such as InkAcctNbr.

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 1-6 (including any system fields identified as required by the Client's MPX 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 1-6. The set of configuration tasks includes and is limited to the following:

1. Enable selected fields in the Constituent360 database
2. Configure cross-references for the DataSync gift export process
3. Implement constituent import/export DataSync operation
4. Implement gift export DataSync operation
5. Implement eCommerce download DataSync operation
6. Implement unsynced transaction DataSync operation
7. Configure Convio administrative user interfaces
8. 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 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 MPX 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. Execute DataSync testing and verification in conjunction with Convio.
4. 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 – Constituent Import to Convio

Constituent Biographical Data				
MPX Table Name	CSV Header Name	Convio Column Name	Comment	Required
Donor Notes	CONSID	CONS_ID	The Convio unique identifier for the record.	No
	ENTITYID	MEMBER_ID	This is the unique identifier for MPower (AcctNbr)	Yes
	DEFSALUT	CUSTOM_STRING1	Salutation	No
Donor Account	TITLE	CONS_TITLE	Donor's name title: Dr. Miss Mr. Mrs. Ms. Pastor Reverend	No
Donor Account	FIRSTNAME	FIRST_NAME	Donor's first name.	No
Donor Account	LASTNAME	LAST_NAME	Donor's last name.	No
Donor Account	SUFFIX	CONS_SUFFIX	Donor's name suffix: III Jr. Sr. II IV PhD Esq. M.D.	No
Donor Account	ORNAME	EMPLOYER	Organization Name if applicable (This is now a separate field in MPX)	No
Donor Account	ADDR1	HOME_STREET1	Street1 address of donor's primary address.	No
Donor Account	ADDR2	HOME_STREET2	Street2 address of donor's primary address.	No
Donor Account	ADDR3	HOME_STREET3	Street3 address of donor's primary address.	No
Donor Account	ADDRESSCITY	HOME_CITY	City of donor's primary address.	No
Donor Account	ADDRESSSTATE	HOME_STATEPROV	State of donor's primary address.	No
Donor Account	ADDRESSZIP	HOME_ZIP	Postal code of donor's primary address.	No

Donor Account	ADDRESSCOUNTRY	HOME_COUNTRY	Country of donor's primary address.	No
Donor Email Address	DEFEMAIL	PRIMARY_EMAIL	Donor's e-mail address. Required for upload.	Yes
Donor Telephone Number	DEFPHONE	HOME_PHONE	This is the phone number itself. Any form of phone number is acceptable. TI will strip the phone number supplied down to its base digits and reformat the number for incorporation into MPX.	No
	TOTALGIFTS	EXTERNAL_LIFETIME_GIFT_AMOUNT	Total Giving Ever	No
	LASTGIFT	EXTERNAL_LAST_GIFT_AMOUNT	Amount Last Gift	No
	LASTGIFTDATE	EXTERNAL_LAST_GIFT_DATE	Date of Last Gift	No
	FIRSTGIFT	EXTERNAL_FIRST_GIFT_AMOUNT	Amount First Gift	No
	FIRSTGIFTDATE	EXTERNAL_FIRST_GIFT_DATE	Date of First Gift	No
	LARGESTGIFT	EXTERNAL_LARGEST_GIFT_AMOUNT	Amount Largest Gift	No
	LARGESTGIFTDATE	EXTERNAL_LARGEST_GIFT_DATE	Date of Largest Gift	No
	TOTALORDERS	CUSTOM_MONETARY_VALUE1	Total Sales Amount Ever	No
	LASTSALE	CUSTOM_MONETARY_VALUE2	Last Sale Amount	No
	LASTSALEDATE	CUSTOM_DATE1	Last Sale Date	No
	FIRSTSALE	CUSTOM_MONETARY_VALUE3	First Sale Amount	No
	FIRSTSALEDATE	CUSTOM_DATE2	First Sale Date	No
	LARGESTSALE	CUSTOM_MONETARY_VALUE4	Largest Sale Amount	No
	LARGESTSALEDATE	CUSTOM_DATE3	Largest Sale Date	No
Donor MediaCode	MEDIACODE	CUSTOM_STRING2	Media Code associated with donor	No
Donor MailRestrictCode	MAILCODE	ACCEPTS_EMAIL	25' = No email, otherwise Accepts Email	No

Exhibit 2 – Constituent Export from Convio

*Each MPX Table represents a separate Convio output file
A Profile is output for a new profile or a modified profile (separate files)*

Constituent Biographical Data			
MPX Table Name	MPX Column Name	Convio Column Name	Comment
Donor_Account	cstAcctNbr	MEMBER_ID	This is the unique identifier for MPower (AcctNbr)
<i>Donor Account</i>	<i>InkAcctNbr</i>	<i>CONS_ID/TRANSACTION_ID</i>	<i>The value in this field links this record to related records in other files in the KTAB file set. After the file is read into TI, this value is over-written with a unique value generated by TI, and the association to other records in the KTAB file set is maintained.</i>
Donor Account	DonorTitleName	CONS_TITLE	Donor's name title: Dr. Miss Mr. Mrs. Ms. Pastor Reverend
Donor Account	DonorFirstName	FIRST_NAME	Donor's first name.
Donor Account	DonorLastName	LAST_NAME	Donor's last name.
Donor Account	DonorSuffix	CONS_SUFFIX	Donor's name suffix: III Jr. Sr. II IV PhD Esq. M.D.
Donor Account	OrganizationName	CUSTOM_STRING3	Organization Name if applicable
Donor Account	AddressLines	HOME_STREET1 HOME_STREET2 HOME_STREET3	Multiple address lines can be split up by
Donor Account	City	HOME_CITY	City of donor's primary address.

Donor Account	State	HOME_STATEPROV	State of donor's primary address.
Donor Account	Zip	HOME_ZIP	Postal code of donor's primary address.
Donor Account	Country	HOME_COUNTRY	Country of donor's primary address.
Donor_EmailAddress	InkAcctNbr	CONS_ID	
Donor Email Address	emailCategory	N/A	Blank
Donor Email Address	emailAddress	PRIMARY_EMAIL	Donor's e-mail address.
Donor_TelephoneNumber	InkAcctNbr	CONS_ID	
Donor Telephone Number	isPrimary	N/A	Y
Donor Telephone Number	PhoneCategory	N/A	hardcoded to "Primary"
Donor Telephone Number	PhoneNumber	HOME_PHONE	This is the phone number itself. Any form of phone number is acceptable. TI will strip the phone number supplied down to its base digits and reformat the number for incorporation into MPX
Donor_Notes	InkAcctNbr	CONS_ID	Convio Constituent ID
Donor_Notes	NoteCategory	N/A	Only for new profiles "CONVIO"
Donor_Notes	NoteSubject	N/A	"Convio Unique Identifier"
Donor_Notes	NoteBody	CONS_ID	Convio Constituent ID
Donor_MediaCode	InkAcctNbr	CONS_ID	
	cstMediaCode	CUSTOM_STRING1	Media Code associated with donor
Donor_MailRestictCode	InkAcctNbr	CONS_ID	
	cstMailCodeValue	ACCEPTS_EMAIL	25' = No email if constituent doesn't accept email

Exhibit 3 – Gift Download File

Gift Download			
MPX Table Name	MPX Column Name	Convio Field Name	Field Description (Notes)
Gift_Master	InkAcctNbr	CONS_ID	Convio User ID
Gift_Master	InkGiftRef	TRANSACTION_ID	Convio Transaction ID
Gift_Master	GiftDate	DONATION_DATE	Donation Date (MM/DD/YYYY)
Gift_Master	PayMethodCode	TENDER_TYPE	Code indicating the payment method. MPX supports built-in values for Cash, Check and Credit Card. If your codes do not match the codes used by MPX, the Domain Code Resolver will allow you to associate your code with MPXs code when you run TI or add a new code."INET" is the value to be used on all Web Transactions. This allows us to know that the credit card was processed via the Web.
Gift_Master	CCType	TENDER_INSTANCE_ID	A code to indicate the type of credit card used (if payment was by credit card). Values will be 'VISA', 'MASTERCARD', 'AMEX' and 'DISCOVER'.
Gift_Master	CCExpiry	CARD_EXP_DATE	Blank. Credit Card Expiration Date
Gift_Master	PayRefNum	CARD_NUMBER	Blank. Card Number
Gift_Master	CCAuth	REFERENCE_NUMBER	Blank. Processor Approval Code
Gift_Master	CCAuthDate	DONATION_DATE	Blank. Authorization Date
Gift_Master	ReceiptNumber	N/A	Blank (Convio receipt will be in Comment field)
Gift_Master	CurrencyCode	CURRENCY_CODE	Values will be "USD"
Gift_Master	MediaCode	CUSTOM_STRING1	Media Code associated with donor
Gift_Master	MotivationCode	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Gift_Master	Comment	USER_CONFIRM_CODE	The Convio Confirmation Code
Gift_Master	GiftAmt	VALUE_TRANSACTED	Gift Amount
Gift_Master	FundID	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Gift_Master	PledgeCode	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.

Gift_Master	Deductible	N/A	Indicates whether or not this gift is deductible. If this field is empty, then Deductible is assumed to be true. A value of 1, T, or Y indicates Deductible. A value of 0, F, or N indicates Non-Deductible. This field is not case-sensitive. Always "Y"
Gift_Master	Anonymous	dr1.ANONYMOUS	Y' if anonymous, 'N' if not anonymous
Gift_Master	Batch Type	N/A	hardcoded to "Convio"

Exhibit 4 – eCommerce Downloads

Each MPX Table represents a separate Convio output file

Gift Download			
MPX Table Name	MPX Column Name	Convio Field Name	Field Description (Notes)
Order_Master	InkAcctNbr	CONS_ID	Convio User ID
Order_Master	InkOrdRef	TRANSACTION_ID	Convio Transaction ID
Order_Master	cstOrdNbr	N/A	Blank
Order_Master	OrderDate	DONATION_DATE	Donation Date (MM/DD/YYYY)
Order_Master	PayMethodCode	TENDER_TYPE	Code indicating the payment method. MPX supports built-in values for Cash, Check and Credit Card. If your codes do not match the codes used by MPX, the Domain Code Resolver will allow you to associate your code with MPXs code when you run TI or add a new code."INET" is the value to be used on all Web Transactions. This allows us to know that the credit card was processed via the Web.
Order_Master	CCType	TENDER_INSTANCE_ID	A code to indicate the type of credit card used (if payment was by credit card). Values will be 'VISA', 'MASTERCARD', 'AMEX' and 'DISCOVER'.
Order_Master	CCEpiry	CARD_EXP_DATE	Blank. Credit Card Expiration Date
Order_Master	PayRefNum	CARD_NUMBER	Blank. Card Number
Order_Master	CCAuth	REFERENCE_NUMBER	Blank. Processor Approval Code
Order_Master	CCAuthDate	DONATION_DATE	Blank. Authorization Date
Order_Master	CurrencyCode	CURRENCY_CODE	Values will be "USD"
Order_Master	MediaCode	CUSTOM_STRING1	Media Code associated with donor
Order_Master	MotivationCode	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Order_Master	PurchaseLocation	N/A	Always "01"
Order_Master	FreeLocation	N/A	Always "01"
Order_Master	Comment	USER_CONFIRM_CODE	The Convio Confirmation Code
Order_Master	TotalFunds	VALUE_TRANSACTED	Order Amount charged to credit card
Order_Master	ShipperTotal	oi.SHIPPING_CHARGE	Shipping Total
Order_Master	Discount	oi.DISCOUNT_CHARGE	Total amount of any discounts
Order_Master	OrderTax	oi.SALES_TAX	Total amount of any tax

Order_Master	Ship_Name	SHIP_TO_NAME	Always fill it in
Order_Master	Ship_AddressLines	SHIP_TO_STREET	Always fill it in. Street1 and Street2 appended by tag
Order_Master	Ship_City	SHIP_TO_CITY	Always fill it in
Order_Master	Ship_State	SHIP_TO_STATE	Always fill it in
Order_Master	Ship_Zip	SHIP_TO_ZIP	Always fill it in
Order_Master	ShipCounty	N/A	Always be blank
Order_Master	ShipCountry	SHIP_TO_COUNTRY	Always fill it in
Order_Master	BatchType	N/A	hardcoded to "Convio"
Order_Master	GiftMotvCode	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Order_Master	GiftPledgeCode	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Order_Master	GiftFundID	N/A	MPX Codes can be set on a Cross-Reference List for Convio types: Form, Campaign, and Store. The default value is only used if there is not a motivation code noted on the form.
Order_Detail	InkOrdRef	TRANSACTION_ID	Convio Transaction ID
Order_Detail	ProdCode	p.INTERNAL_PRODUCT_NAME	External product identifier
Order_Detail	PriceCode	N/A	Always 'ST'
Order_Detail	Price	ITEM_PRICE	Current price of item. Donations just reflected in order_master total - no order_detail record
Order_Detail	PurQty	IS_PREMIUM	Quantity of items purchased, values will be 1 to n.
Order_Detail	FreeQty	IS_PREMIUM	1 for gifts with premium, 0 for ecommerce orders
Order_Detail	Tax	N/A	Will always be 0
Order_Detail	SecondTax	N/A	Will always be 0
Order_Detail	Taxable	N/A	Always 'Y'

Exhibit 5 – 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 6 – Upload of Group/Interest Category Assignments

Group Assignment	
Field	Field Description
Constituent Identifier	Constituent e-mail address or Constituent ID
Group Identifier	Convio Group ID or Cross-Referenced External ID
Interest Assignment	
Field	Field Description
Constituent Identifier	Constituent e-mail address or Constituent ID
Interest Category Identifier	Convio Interest Category ID or Cross-Referenced External ID