

Convio Standard DataSync Specification Sheet

Document TS-03-RE

Definitions:

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

Convio Standard DataSync: The Convio Standard DataSync with Raiser's Edge 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 Raiser's Edge 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 Raiser's Edge 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 GFAppeal, CampID, FundID, PackageID) 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 and gift data between Convio and a **single instance** of Raiser's Edge.

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

- Constituent Import/Export – Exhibit 1
- Transaction Download – Exhibit 2
- Export of Unsynced Transactions – Exhibit 3
- 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 Raiser's Edge 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 and additional import/export ID's.

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 Raiser's Edge 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 1-4. 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 transaction download 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 Raiser's Edge 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 the 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 on at a rate of 500 per week

Exhibit 1 – Constituent Import/Export

Constituent Biographical Data					
Raiser's Edge Upload Header	Raiser's Edge Download Header	Download from Convio	Upload to Convio	Convio Mapping	Notes
CNBIO_KEY_INDICATOR	KEYIND	Yes	No		Constituent Key Indicator: Sync only supports 'Individual', no 'Organization' support
CNBIO_ID	CONSID	Yes	Yes	MEMBER_ID	Raiser's Edge Constituent ID
CNBIO_IMPORT_ID	IMPORTID	Yes	Yes	EXCHANGE_ID	Constituent Import ID
CNBIO_TITLE_1	TITL1	Yes	Yes	CONS_TITLE	Title
CNBIO_FIRST_NAME	FIRSTNAME	Yes	Yes	FIRST_NAME	First Name
CNBIO_MIDDLE_NAME	MIDNAME	Yes	Yes	MIDDLE_NAME	Middle Name
CNBIO_LAST_NAME	LASTNAME	Yes	Yes	LAST_NAME	Last Name
CNBIO_SUFFIX_1	SUFF1	Yes	Yes	CONS_SUFFIX	Suffix
CNBIO_BIRTH_DATE	BDAY	Yes	Yes	BIRTH_DATE	MM/DD/YYYY
CNBIO_GENDER	GENDER	Yes	Yes	CONS_GENDER	Male Female
CNBIO_REQUESTS_NO_E-MAIL	NOEMAIL	Yes	Yes	ACCEPTS_EMAIL	("Yes": doesn't want email; "No"=wants email)
CNADRPRF_IMPORT_ID	ADDRIMPID	Yes	Yes	HOME_ADDR_IMPORT_ID	Address Import ID
CNADRPRF_ADDRLINE1	ADDRLINES	Yes	Yes	HOME_STREET1	Home Address Line 1
CNADRPRF_ADDRLINE2		Yes	Yes	HOME_STREET2	Home Address Line 2
CNADRPRF_CITY	ADDRCITY	Yes	Yes	HOME_CITY	Home City
CNADRPRF_STATE	ADDRSTATE	Yes	Yes	HOME_STATEPROV	Home State
CNADRPRF_ZIP	ADDRZIP	Yes	Yes	HOME_ZIP	Home Zip Code
CNADRPRF_CONTRYLONGDSCRIPTON	ADDRCOUNTRY	Yes	Yes	HOME_COUNTRY	Home Country
CNADRPRFPH_1_01_ADDR_IMPORT_ID	PHONEADDRIMPID1	Yes	No	HOME_ADDR_IMPORT_ID	Import ID for parent Address Record
CNADRPRFPH_1_01_IMPORT_ID	PHONEIMPID1	Yes	Yes	PRIMARY_EMAIL_IMPORT_ID	Phone Record Import ID

CNADRPRFPH_1_01_PHONE_TYPE	PHONETYPE1	Yes	Yes	"Email"	This will be the type your system uses to identify E-Mail addresses
CNADRPRFPH_1_01_PHONE_NUMBER	PHONENUM1	Yes	Yes	PRIMARY_EMAIL	E-mail address
CNADRPRFPH_2_01_ADDR_IMPORT_ID	PHONEADDRIMPID2	Yes	No	HOME_ADDR_IMPORT_ID	Import ID For Parent Address Record
CNADRPRFPH_2_01_IMPORT_ID	PHONEIMPID2	Yes	Yes	HOME_PHONE_IMPORT_ID	Phone Record Import ID
CNADRPRFPH_2_01_PHONE_TYPE	PHONETYPE2	Yes	Yes	"Home"	This will be the type your systems uses to identify Home phone numbers
CNADRPRFPH_2_01_PHONE_NUMBER	PHONENUM2	Yes	Yes	HOME_PHONE	Home Phone Number
CNADRPRFPH_3_01_ADDR_IMPORT_ID	PHONEADDRIMPID3	Yes	No	HOME_ADDR_IMPORT_ID	Import ID For Parent Address Record
CNADRPRFPH_3_01_IMPORT_ID	PHONEIMPID3	Yes	Yes	WORK_PHONE_IMPORT_ID	Work Phone Record Import ID
CNADRPRFPH_3_01_PHONE_TYPE	PHONETYPE3	Yes	Yes	"Business"	This will be the type your systems uses to identify Work phone numbers
CNADRPRFPH_3_01_PHONE_NUMBER	PHONENUM3	Yes	Yes	WORK_PHONE	Work Phone Number
CNLRGGF_1_DATE		No	Yes	EXTERNAL_LARGEST_GIFT_DATE	RE: Date of Largest Gift
CNLRGGF_1_AMOUNT		No	Yes	EXTERNAL_LARGEST_GIFT_AMOUNT	RE: Amount of Largest Gift
CNLGF_1_DATE		No	Yes	EXTERNAL_LAST_GIFT_DATE	RE: Date of Last Gift
CNLGF_1_AMOUNT		No	Yes	EXTERNAL_LAST_GIFT_AMOUNT	RE: Amount of Last Gift
CNADRSAL_ADDRESSEE		No	Yes	SALUTATION_FORMAL	RE Addressee
CNADRSAL_SALUTATION		No	Yes	SALUTATION_CASUAL	RE Salutation

Exhibit 2 – Transaction Download

Transaction Download		
Convio Field Name	Field Name	Field Description (Notes)
MEMBER_ID	CONSID	Raiser's Edge ID
TRANSACTION_ID	GFIMPID	Unique ID for gift assigned by Convio - prevents duplicates
	CAMPID	RE Campaign ID, cross-referenced from Convio donation form ID
	GFAPPEAL	RE Appeal ID, cross-referenced from Convio Convio donation form ID
	FUNDID	RE Fund ID, cross-referenced from Convio Convio donation form ID
VALUE_TRANSACTED	GFTAMT	Amount of gift
DONATION_DATE	GFDATE	Date of Donation
USER_CONFIRM_CODE	GFREF	Reference - set to Convio provided User Confirmation Code
TENDER_TYPE_ID	GFPAYMETH	decode to Credit Card, Check, Cash, Other
TENDER_INSTANCE_ID	GFCCTYPE	"Visa" "MasterCard" "Amex" "Discover"
CAMPAIGN.TITLE/STORE.NAME	TITLE	For general donations this will be the donation form title, for ecommerce purchases, this will be the Store Name
Honor/Memorial		
HONMEM_TYPE	Gf_Tr_1_01_Tribute_Type	In Memory will have value of "in memory of", In Honor will have value of "in honor of"
HONOREE_TITLE	Gf_Tr_1_01_Cn_Title_1	Title of honoree.
HONOREE_NAME	Gf_Tr_1_01_Cn_Name	Full name of honoree
NOTIFY_TITLE	Gf_Tr_1_01_Ak_1_01_Rc_Title_1	Title of person to notify of the honor/memorial
NOTIFY_NAME	Gf_Tr_1_01_Ak_1_01_Rc_Name	Full name of person to notify of the honor/memorial
NOTIFY_ADDR1	NOTIFY_ADDRLINE1	Address 1 of person to notify of the honor/memorial
NOTIFY_ADDR2	NOTIFY_ADDRLINE2	Address 2 of person to notify of the honor/memorial
NOTIFY_CITY	NOTIFY_CITY	City of person to notify of the honor/memorial
NOTIFY_STATE	NOTIFY_STATE	State of person to notify of the honor/memorial
NOTIFY_ZIP	NOTIFY_ZIP	Zip Code of person to notify of the honor/memorial
NOTIFY_COUNTRY	NOTIFY_CONTRYLONGDESCRIPTION	Country of person to notify of the honor/memorial

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

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