

Convio Standard DataSync Specification Sheet

Document TS-03-TA

Definitions:

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

Convio Standard DataSync: The Convio Standard DataSync with Team Approach 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 Team Approach 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 Team Approach 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 and gift data between Convio and a **single instance** of Team Approach.

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

- Constituent Upload – Exhibit 1
- Constituent and 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 Team Approach 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 such as Alternate Account ID, Name ID and Email ID.

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 Team Approach 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 DataSync operation
4. Implement constituent and transaction 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 Team Approach 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

Constituent Biographical Data Upload					
Target Team Approach Field	Convio Field Name (relevant to Convio only)	TTA Upload Headers	Required Upload Field?	Upload to Convio	Field Description/Notes
ACCOUNT ID + NAME ID	MEMBER_ID	ACCOUNTID_NAMEID	Yes	Yes	Concatenated value of Account ID and Name ID to uniquely identify the TA record corresponding to the Convio record
ACCOUNT ID	CUSTOM_NUMBER1	ACCOUNT_ID	Yes	Yes	TA Account ID
NAME ID	CUSTOM_NUMBER2	NAME_ID	Yes	Yes	Name ID of TA Name record
TITLE	CONS_TITLE	TITLE	No	Yes	Title of constituent. TA code for title
LAST NAME	LAST_NAME	LAST_NAME	No	Yes	Last name of constituent
FIRST NAME	FIRST_NAME	FIRST_NAME	No	Yes	First name of constituent.
MIDDLE NAME	MIDDLE_NAME	MIDDLE_NAME	No	Yes	Middle name of constituent
SUFFIX	CONS_SUFFIX	SUFFIX	No	Yes	Suffix
GENDER	CONS_GENDER	GENDER	No	Yes	TA Code for gender - M (Male), F (Female), or blank.
BIRTH DATE	BIRTH_DATE	BIRTH_DATE	No	Yes	MM/DD/YYYY
DECEASED	DECEASED	DECEASED	No	Yes	Y,N, or null
ADDRESS ID	CUSTOM_NUMBER3	ADDRESS_ID	No	Yes	Address ID of Target Name record
ADDRESS TYPE	PREFERRED_ADDRESS	ADDRESS_TYPE	No	Yes	H = Home, W = Work, null = Home
ADDRESS LINE	HOME_STREET1 / WORK_STREET1	ADDRESS_LINE	No	Yes	Street address 1 of constituent. Convio field determined by value in Preferred_Address.
ADDRESS EXTRA LINE1	HOME_STREET2 / WORK_STREET2	ADDRESS_EXTRA_LINE_1	No	Yes	Street address 2 of constituent. Convio field determined by value in Preferred_Address.

ADDRESS EXTRA LINE2	HOME_STREET3 / WORK_STREET3	ADDRESS_EXTRA_LINE_2	No	Yes	Street address 3 of constituent. Convio field determined by value in Preferred_Address.
CITY	HOME_CITY / WORK_CITY	CITY	No	Yes	Address city of constituent. Convio field determined by value in Preferred_Address.
STATE	HOME_STATEPROV / WORK_STATEPROV	STATE	No	Yes	Address state/province. Two character (AZ, AL, etc.). Convio field determined by value in Preferred_Address.
ZIP	HOME_ZIP / WORK_ZIP	ZIP	No	Yes	Address zip or postal code of constituent - 5 digits. Convio field determined by value in Preferred_Address.
ZIP EXTENSION		ZIP_EXTENSION	No	Yes	Address zip or postal code of constituent +4 extension. Convio field determined by value in Preferred_Address.
COUNTRY	HOME_COUNTRY / WORK_COUNTRY	COUNTRY	No	Yes	Address country of constituent - TA code for country. Convio field determined by value in Preferred_Address.
NO_EMAIL	ACCEPTS_EMAIL	NO_EMAIL	No	Yes	If value is NO EMAIL, then donor does NOT accept email
E-MAIL ADDRESS	PRIMARY_EMAIL	EMAIL_ADDRESS	Yes	Yes	Email address of constituent.
TELEPHONE ID	CUSTOM_NUMBER4	TELEPHONE_ID	No	Yes	TA Phone ID - always blank for new recs from Convio.
TELEPHONE NUMBER	HOME_PHONE / WORK_PHONE / MOBILE_PHONE	TELEPHONE_NUMBER	No	Yes	Home phone number of constituent. Convio field determined by value in Telephone_Type.
TELEPHONE TYPE	PREFERRED_PHONE	TELEPHONE_TYPE	No	Yes	Values 'H','W','CE'
INSIDE SALUTATION	CUSTOM_STRING1	INSIDE_SALUTATION	No	Yes	Inside salutation from account level
EXPIRATION_DATE	CUSTOM_DATE1	EXPIRATION_DATE	No	Yes	Membership expiration date: MM/DD/YYYY
FIRST GIFT AMOUNT	EXTERNAL_FIRST_GIFT_AMOUNT	FIRST_GIFT_AMT	No	Yes	Indicates first contribution given by member
FIRST GIFT DATE	EXTERNAL_FIRST_GIFT_DATE	FIRST_GIFT_DATE	No	Yes	Date of first gift
TOTAL GIVING	EXTERNAL_LIFETIME_GIFT_AMOUNT	TOTAL_GIVING_AMT	No	Yes	Indicates total, cumulative amount given by member
LARGEST GIFT AMOUNT	EXTERNAL_LARGEST_GIFT_AMOUNT	LARGEST_GIFT_AMT	No	Yes	Indicates the largest single contribution given by member
LARGEST GIFT DATE	EXTERNAL_LARGEST_GIFT_DATE	LARGEST_GIFT_DATE	No	Yes	Date of largest gift
LAST GIFT AMOUNT	EXTERNAL_LAST_GIFT_AMOUNT	LAST_GIFT_AMT	No	Yes	Amount of most recent contribution

LAST GIFT DATE	EXTERNAL_LAST_GIFT_DATE	LAST_GIFT_DATE	No	Yes	Date of most recent contribution
GIVING LEVEL AMOUNT	CUSTOM_MONETARY_VALUE1	GIVING_LEVEL_AMT	No	Yes	TA giving level amount
CURRENT MEMBER YEAR RENEWAL DATE	CUSTOM_DATE2	CURRENT_MEM_YR_RENEWAL_DATE	No	Yes	Date of most recent renewal gift
CURRENT MEMBER YEAR RENEWAL AMOUNT	CUSTOM_MONETARY_VALUE2	CURRENT_MEM_YR_RENEWAL_AMT	No	Yes	TA Current member year renewal amount
CURRENT MEMBER YEAR PLEDGE AMOUNT	CUSTOM_MONETARY_VALUE3	CURRENT_MEM_YR_PLEDGE_AMT	No	Yes	TA Current member year pledge amount
CURRENT MEMBER YEAR PAID AMOUNT	CUSTOM_MONETARY_VALUE4	CURRENT_MEM_YR_PAID_AMT	No	Yes	TA Current member year paid amount

Exhibit 2 – Constituent and Transaction Download

Constituent and Transaction Download				
Target Team Approach Field	Convio Field Name (relevant to Convio only)	TTA Download Headers	Download from Convio	Field Description/Notes
Constituent Data				
ACCOUNT ID	CUSTOM_NUMBER1	ACCOUNT_ID	Yes	TA Account ID
NAME ID	CUSTOM_NUMBER2	NAME_ID	Yes	Name ID of TA Name record
TITLE	CONS_TITLE	TITLE	Yes	Title of constituent. TA code for title
LAST NAME	LAST_NAME	LAST_NAME	Yes	Last name of constituent
FIRST NAME	FIRST_NAME	FIRST_NAME	Yes	First name of constituent.
MIDDLE NAME	MIDDLE_NAME	MIDDLE_NAME	Yes	Middle name of constituent
SUFFIX	CONS_SUFFIX	SUFFIX	Yes	Suffix
GENDER	CONS_GENDER	GENDER	Yes	TA Code for gender - M (Male), F (Female), or blank.
BIRTH DATE	BIRTH_DATE	BIRTH_DATE	Yes	MM/DD/YYYY
DECEASED	DECEASED	DECEASED	Yes	Y,N, or null
ADDRESS ID	CUSTOM_NUMBER3	ADDRESS_ID	Yes	Address ID of Target Name record
ADDRESS TYPE	PREFERRED_ADDRESS	ADDRESS_TYPE	Yes	H = Home, W = Work, null = Home
ADDRESS LINE	HOME_STREET1 / WORK_STREET1	ADDRESS_LINE	Yes	Street address 1 of constituent. Convio field determined by value in Preferred_Address.
ADDRESS EXTRA LINE1	HOME_STREET2 / WORK_STREET2	ADDRESS_EXTRA_LINE	Yes	Street address 2 of constituent. Convio field determined by value in Preferred_Address.
CITY	HOME_CITY / WORK_CITY	CITY	Yes	Address city of constituent. Convio field determined by value in Preferred_Address.
STATE	HOME_STATEPROV / WORK_STATEPROV	STATE	Yes	Address state/province. Two character (AZ, AL, etc.). Convio field determined by value in Preferred_Address.
ZIP	HOME_ZIP / WORK_ZIP	ZIP	Yes	Address zip or postal code of constituent - 5 digits. Convio field determined by value in Preferred_Address.

ZIP EXTENSION		ZIP_EXTENSION	Yes	Address zip or postal code of constituent +4 extension. Convio field determined by value in Preferred_Address.
COUNTRY	HOME_COUNTRY / WORK_COUNTRY	COUNTRY	Yes	Address country of constituent - TA code for country. Convio field determined by value in Preferred_Address.
NO_EMAIL	ACCEPTS_EMAIL	NO_EMAIL	Yes	If value is NO_EMAIL, then donor does NOT accept email
E-MAIL ADDRESS	PRIMARY_EMAIL	EMAIL_ADDRESS	Yes	Email address of constituent.
EMAIL STATUS	EMAIL_STATUS	EMAIL_STATUS	Yes	Status of an email address (A active, I inactive)
PREFERRED_EMAIL		PREFERRED_EMAIL	Yes	Always null
TELEPHONE ID	CUSTOM_NUMBER4	TELEPHONE_ID	Yes	TA Phone ID - always blank for new recs from Convio.
TELEPHONE NUMBER	HOME_PHONE / WORK_PHONE / MOBILE_PHONE	TELEPHONE_NUMBER	Yes	Home phone number of constituent. Convio field determined by value in Telephone_Type.
TELEPHONE TYPE	PREFERRED_PHONE	TELEPHONE_TYPE	Yes	Values 'H','W','CE'
Transaction Data				
GIFT KIND	VT.DONATION_TYPE	GIFT_KIND	Yes	OP (one payment), IN (installment for gift with end date), SG (sustaining gift with no end date)
GIFT DATE	VT.DONATION_DATE	GIFT_DATE	Yes	YYYYMMDD - Date on which gift was made
PAYMENT AMOUNT	VT.VALUE_TRANSACTED	PAYMENT_AMOUNT	Yes	Amount of online gift in cents. Installment amount (amount of current payment) for recurring gifts.
PLEDGE NUMBER	VT.TRANSACTION_ID / RP.SEED_TRANSACTION_ID	PLEDGE_NUMBER	Yes	Convio's transaction ID for a one-time gift; the seed trans_id if a sustaining gift. Add 8000000000 to all values.
ADJUSTMENT CODE		ADJUSTMENT_CODE	Yes	For refunds, blank or "RT" with payment amount of zero
SOURCE CODE		SOURCE_CODE	Yes	Cross-reference value maintained by client.
PAYMENT METHOD	VT.TENDER_INSTANCE_ID	PAYMENT_METHOD	Yes	ZM','ZV','ZA','ZD', or 'ZC'
CLASSIFICATION VALUE - DISCOUNT	UP.CUSTOM_STRING11	CLASSIFICATION_VALUE_DISCOUNT	Yes	TA Discount code
AFFILIATION	UP.CUSTOM_STRING12	AFFILIATION	Yes	"TV", "RD", or "BO"
SHIP_TO_FIRST_NAME	OSI.SHIP_TO_FIRST_NAME	SHIP_TO_FIRST_NAME	Yes	Shipping first name

SHIP_TO_LAST_NAME	OSI.SHIP_TO_LAST_NAME	SHIP_TO_LAST_NAME	Yes	Shipping last name
SHIP_TO_STREET1	OSI.SHIP_TO_STREET1	SHIP_TO_STREET1	Yes	Shipping street 1
SHIP_TO_STREET2	OSI.SHIP_TO_STREET2	SHIP_TO_STREET2	Yes	Shipping street 2
SHIP_TO_CITY	OSI.SHIP_TO_CITY	SHIP_TO_CITY	Yes	Shipping city
SHIP_TO_STATEPROV	OSI.SHIP_TO_STATEPROV	SHIP_TO_STATEPROV	Yes	Shipping state or province
SHIP_TO_ZIP	OSI.SHIP_TO_ZIP	SHIP_TO_ZIP	Yes	Shipping zip code
SHIP_TO_COUNTRY	OSI.SHIP_TO_COUNTRY	SHIP_TO_COUNTRY	Yes	Shipping country
Recurring Gifts				
TRANSACTION_TYPE	VT.PAYMENT_NUMBER	TRANSACTION_TYPE	Yes	PP (any recurring payment); PL (one-time or first payment)
PLEDGE FREQUENCY	RP.FREQUENCY	PLEDGE_FREQUENCY	Yes	Pledge frequency (e.g., M,Q,A,S) for payment number=1, blank otherwise
PLEDGE AMOUNT	VT.VALUE_TRANSACTED	PLEDGE_AMOUNT	Yes	Total amount of recurring gift on first payment or one-time payment. Send null on all installments after first one.
INSTALLMENT AMOUNT	RP.GIFT_AMOUNT	INSTALLMENT_AMOUNT	Yes	Total gift amount divided by frequency, on 1st payment of recurring gift only
Benefits/Premiums				
BENEFIT 1	P.INTERNAL_PRODUCT_NAME	BENEFIT_1	Yes	Name of premium if selected
BENEFIT 2	P.INTERNAL_PRODUCT_NAME	BENEFIT_2	Yes	Name of premium if selected
BENEFIT 3	P.INTERNAL_PRODUCT_NAME	BENEFIT_3	Yes	Name of premium if selected
BENEFIT 4	P.INTERNAL_PRODUCT_NAME	BENEFIT_4	Yes	Name of premium if selected
BENEFIT 5	P.INTERNAL_PRODUCT_NAME	BENEFIT_5	Yes	Name of premium if selected
BENEFIT 6	P.INTERNAL_PRODUCT_NAME	BENEFIT_6	Yes	Name of premium if selected
BENEFIT 7	P.INTERNAL_PRODUCT_NAME	BENEFIT_7	Yes	Name of premium if selected
BENEFIT 8	P.INTERNAL_PRODUCT_NAME	BENEFIT_8	Yes	Name of premium if selected
BENEFIT 9	P.INTERNAL_PRODUCT_NAME	BENEFIT_9	Yes	Name of premium if selected
BENEFIT 10	P.INTERNAL_PRODUCT_NAME	BENEFIT_10	Yes	Name of premium if selected

Event Tickets/Registrations				
TICKET EVENT 1	CA.EVENT_ID	TICKET_1_EVENT	Yes	TA code for ticketed event
TICKET CLASS 1	CA.TICKET_CLASS_ID	TICKET_1_CLASS	Yes	TA code for ticket class
NUMBER OF TICKETS 1	CA.NUMBER_ATTENDEES	TICKET_1_TICKETS	Yes	Number of tickets for given ticket class
TICKET EVENT 2	CA.EVENT_ID	TICKET_2_EVENT	Yes	TA code for ticketed event
TICKET CLASS 2	CA.TICKET_CLASS_ID	TICKET_2_CLASS	Yes	TA code for ticket class
NUMBER OF TICKETS 2	CA.NUMBER_ATTENDEES	TICKET_2_TICKETS	Yes	Number of tickets for given ticket class
TICKET EVENT 3	CA.EVENT_ID	TICKET_3_EVENT	Yes	TA code for ticketed event
TICKET CLASS 3	CA.TICKET_CLASS_ID	TICKET_3_CLASS	Yes	TA code for ticket class
NUMBER OF TICKETS 3	CA.NUMBER_ATTENDEES	TICKET_3_TICKETS	Yes	Number of tickets for given ticket class
TICKET EVENT 4	CA.EVENT_ID	TICKET_4_EVENT	Yes	TA code for ticketed event
TICKET CLASS 4	CA.TICKET_CLASS_ID	TICKET_4_CLASS	Yes	TA code for ticket class
NUMBER OF TICKETS 4	CA.NUMBER_ATTENDEES	TICKET_4_TICKETS	Yes	Number of tickets for given ticket class
TICKET EVENT 5	CA.EVENT_ID	TICKET_5_EVENT	Yes	TA code for ticketed event
TICKET CLASS 5	CA.TICKET_CLASS_ID	TICKET_5_CLASS	Yes	TA code for ticket class
NUMBER OF TICKETS 5	CA.NUMBER_ATTENDEES	TICKET_5_TICKETS	Yes	Number of tickets for given ticket class

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