

Document TS-13-RE-02 Convio Database Connector RE Specification Sheet

Definitions:

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

Summary:

Convio will work collectively with the Client and their Raiser's Edge® database administrator to configure the Convio Database Connector RE. The Connector will enable the exchange of constituent and gift data between Convio and a **single instance** of the Client's Raiser's Edge database. The data fields exchanged via the Connector are restricted to the set of fields outlined as follows:

- Constituent Profile Refresh – Exhibit 1
- Duplicate Detection and Record Merge – Exhibit 1
- Account Claiming – Exhibit 2
- Maintenance of Cross-Reference Lists – Exhibit 3
- Data Synchronization of Constituent Records – Exhibit 4
- Export of Transaction Records – Exhibit 5

Clients may exchange all or part of the set of fields identified in the Exhibits but only those fields identified in the Exhibits. For data synchronization of constituent records and export of transaction records, data transfer will occur through the exchange of comma separated value (csv) files on a batch basis using the header formats detailed in Exhibits 4 and 5. Convio will perform all necessary configuration work within the Convio Application Service to produce and accept the exchange files containing all or part of the identified data fields in Exhibits 4 and 5. Convio will also provide requirements to the Client regarding the router/firewall configuration necessary to enable communication between Convio production and the Connector.

Scope of Work

- Work with Client staff to implement the Connector configuration
- Work with Client staff to download and install Connector software
- Provide specifications to Client staff for configuration of router/firewall
- Configure Convio DataSync Application Service
- Validate all Connector features and DataSync processes
- Provide online training to assigned Client DataSync operator(s)

Notes

- DataSync processing can be run ad hoc or on a scheduled basis.

Pricing

- The pricing for the DataSync is presented in Attachment B, SKU TS-13-RE-2, Database Connector RE Integration Services.

Client Responsibilities: Client must provision a computer that meets standard requirements:

- Raiser's Edge v7.81+ running on MS SQL Server or SQL Server Express 2005
- Business class internet connection
- Server class computer running Microsoft Windows® XP Pro/Server, 1GB RAM (ECC recommended), 2GHz processor, 750MB of available hard-disk space on primary drive. Dedicated server is recommended for running the Connector but not required.
- Public static IP address, with associated hostname

- Firewall/Router configured to allow traffic between Convio and the Connector and between the Connector and the Raiser's Edge database

Client will be responsible for configuring router/firewall to accept traffic from provided list of IP ranges and to send files to Convio production server via FTPS. Convio will provide router/firewall specifications; however, Convio is not responsible for the actual configuration of the client firewall. This is a client responsibility.

Client Responsiveness Expectations: A successful Connector project requires that clients remain responsive throughout the course of the project. Clients who are not fully engaged in the Connector project will have their projects put on hold. Once a client is ready to re-engage, the project will be placed back into the project queue for assignment based on available capacity. In terms of responsiveness, Convio expects the following:

- Acknowledgement of all Convio communications within 3 business days
- Completion of cross-reference setup within 5 business days of online training in cross-reference utility
- Merging of duplicates at a rate of 500 per week

Exhibit 1 – Constituent Profile Refresh/Duplicate Detection and Merge

Constituent Profile Refresh/Duplicate Detection and Merge	
Field	Field Description
Import ID	Constituent Import ID
Constituent ID	Constituent Record ID
Key Indicator	Constituent Key Indicator. Only 'Individual' is supported, 'Organization' not supported
Title (1)	Constituent Title
First Name	Constituent First Name
Middle Name	Constituent Middle Name
Last Name	Constituent Last Name
Nickname	Constituent Last Name
Suffix 1	Constituent Suffix 1
Suffix 2	Constituent Suffix 2
Gender	Constituent Gender
Birthday	Constituent Birthday
Requests No Email	Does Constituent accept Email?
Constituent Code	Coding assigned to Constituent record
Deceased Check Box	Is constituent deceased?
Deceased Date	Deceased Date
Primary Addressee ID	Two-digit value representing Raiser's Edge address formatting code
Primary Salutation ID	Two-digit value representing Raiser's Edge salutation formatting code
Address Import ID	Import ID of address record
Address Preferred Checkbox	Is this the Constituent's preferred address?
Address Send Mail Check Box	Does the record contain a valid address for postal mailing
Address Type	Is this a Home Address, Work Address, etc.
Address Line 1	Street 1 Address Info
Address Line 2	Street 2 Address Info
Address Line 3	Street 3 Address Info
Address City	City Address Info
Address State	State Address Info
Address Zip	Zip Address Info
Address Country	Country Address Info
Phone Import ID - Email	Import ID of Email phone record
Phone Number - Email Address	Constituent Primary Email address
Phone Type - Email	Phone Record Type - Email
Phone Import ID – Home Phone	Import ID of Home phone record
Phone Number -	Constituent Home phone number

Home phone	
Phone Type - Home Phone	Phone Record Type - Home
Summary Gift Information	
First Gift Date	Date of First Gift
First Gift Amount	Amount of First Gift
Largest Gift Date	Date of Largest Gift
Largest Gift Amount	Amount of Largest Gift
Last Gift Date	Date of Last Gift
Last Gift Amount	Amount of Last Gift
Lifetime Total Amount	Total Donations over time
Lifetime Total Count	Number of total donations over time
Calendar YTD Amount	Amount of donations this calendar year
Calendar YTD Count	Number of donations this calendar year

Exhibit 2 – Account Claiming

Account claiming may be configured to use a maximum of **five** fields from the table below

Account Claiming	
Field	Field Description
Import ID	Constituent Import ID
Constituent ID	Constituent Record ID
Title (1)	Constituent Title
First Name	Constituent First Name
Middle Name	Constituent Middle Name
Last Name	Constituent Last Name
Nickname	Constituent Last Name
Birthday	Constituent Birthday

Exhibit 3 – Maintenance of Cross-Reference Lists

Raiser's Edge Campaign	
Field	Field Description
Campaign ID	Unique ID of Campaign
Campaign Description	Text Description of Raiser's Edge Campaign
Raiser's Edge Fund	
Field	Field Description
Fund ID	Unique ID of Fund
Fund Description	Text Description of Raiser's Edge Fund
Raiser's Edge Appeal	
Field	Field Description
Appeal ID	Unique ID of Appeal
Appeal Description	Text Description of Raiser's Edge Appeal
Raiser's Edge Package	
Field	Field Description
Package ID	Unique ID of Package
Package Description	Text Description of Raiser's Edge Package
Raiser's Edge Gift Sub Type	
Field	Field Description
Gift SubType ID	Unique ID of Gift Subtype
Gift Subtype Description	Text Description of Raiser's Edge Gift SubType

Exhibit 4 – Data Synchronization of Constituent Records

RE Field Description	Export from RE/ Upload to Convio	Download from Convio/ Import into RE	RE Import Name	Notes
Import ID	Yes	Yes	ImportID	Assigned by Convio for new constituents
Constituent ID	Yes	Yes	ConsID	
Key Indicator	No	Yes	KeyInd	Constituent Key Indicator: Sync only supports 'Individual', no 'Organization' support
Title (1)	Yes	Yes	Titl1	
First Name	Yes	Yes	FirstName	
Middle Name	Yes	Yes	MidName	
Last Name	Yes	Yes	LastName	

Nickname	Yes	Yes	NickName	
Suffix 1	Yes	Yes	Suff1	
Suffix 2	Yes	Yes	Suff2	
Formal Salutation	Yes	No		
Casual Salutation	Yes	No		
Gender	Yes	Yes	Gender	Male/ Female
Birthday	Yes	Yes	Bday	Must be in MM/DD/YYYY format
Marital Status	Yes	No		
Ethnicity	Yes	No		
Religion	Yes	No		
Requests No Email	Yes	Yes	NoEmail	
Constituent Code	No	Yes	ConsCode	Set value based on RE formulas
Deceased Check Box	Yes	No		
Primary Addressee ID	No	Yes	PrimAddID	Set value based on RE formulas
Primary Salutation ID	No	Yes	PrimSalID	Set value based on RE formulas
Address Import ID	Yes	Yes	AddrImpID	
Address Preferred Checkbox	No	Yes	PrefAddr	Only exported for New constituent records and always marked as preferred
Address Send Mail Check Box	Yes	Yes	AddrSendMail	Does the record contain a valid address for postal mailing
Address Type	Yes	Yes	AddrType	Client defined value
Address Lines	Yes	Yes	AddrLines	
Address City	Yes	Yes	AddrCity	
Address State	Yes	Yes	AddrState	
Address Zip	Yes	Yes	AddrZip	
Address Country	Yes	Yes	AddrCountry	
Address Info Source	No	Yes	AddrInfoSrc	Default to "Convio Address Input/Update" for new or modified addresses
Copy Address Import ID	No	Yes	AddrImpID01	The second address is only required to maintain address history
Copy Address Preferred Checkbox	No	Yes	PrefAddr01	Default to "No"
Copy Address Send Mail Check Box	No	Yes	AddrSendMail01	Default to "No"
Copy Address Type	No	Yes	AddrType01	Default to "Previous Address"
Copy Address Lines	No	Yes	AddrLines01	
Copy Address City	No	Yes	AddrCity01	
Copy Address State	No	Yes	AddrState01	

Copy Address Zip	No	Yes	AddrZip01	
Copy Address Country	No	Yes	AddrCountry01	
Copy Address Info Source	No	Yes	AddrInfoSrc01	Default to "Convio Address Input/Update" for new or modified addresses
Phone Address Import ID - Email	No	Yes	PhoneAddrImpID00	
Phone Import ID - Email	Yes	Yes	PhoneImpID00	
Phone Number - Email Address	Yes	Yes	PhoneNum00	
Phone Type - Email	Yes	Yes	PhoneType00	System type used to identify e-mail addresses
Phone Address Import ID - Home Phone	No	Yes	PhoneAddrImpID01	
Phone Import ID - Home Phone	Yes	Yes	PhoneImpID01	
Phone Number - Home Phone	Yes	Yes	PhoneNum01	System type used to identify home phone numbers
Phone Type - Home Phone	Yes	Yes	PhoneType01	
Phone Import ID - Work Phone	Yes	No		
Phone Number - Work Phone	Yes	No		
Phone Import ID - Mobile Phone	Yes	No		
Phone Number - Mobile Phone	Yes	No		
Cons Attribute Import ID: Convio Last Synced	No	Yes	CAttrImpID00	
Cons Attribute Category: Convio Last Synced	No	Yes	CAttrCat00	
Cons Attribute Description: Convio Last Synced	No	Yes	CAttrDesc00	
Cons Attribute Comments: Convio Last Synced	No	Yes	CAttrCom00	
Cons Attribute Date: Convio Last Synced	No	Yes	CAttrDate00	
Spouse First Name	Yes	No		
Spouse Middle Name	Yes	No		
Spouse Last Name	Yes	No		
Spouse Import ID	Yes	No		
Spouse Title	Yes	No		

Spouse Suffix	Yes	No		
Spouse Gender	Yes	No		
Summary Gift Information				
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		

Exhibit 5 – Export of Gift Records

Gift Export Format	
RE Import Name	Description
ImportID	Donor Import ID
GFTType	"Cash"
GFTAmt	Amount of gift
GFDDate	Date of Donation
CampID	RE Campaign ID, cross-referenced from Convio Campaign ID
FundID	RE Fund ID, cross-referenced from Convio Campaign ID
GFAppeal	RE Appeal ID, cross-referenced from Convio Campaign ID
PackageID	RE Package ID, cross-referenced from Convio Campaign ID
GFSubType	RE Gift SubType, cross-referenced from Convio Campaign ID
GFRef	Reference - set to Convio provided User Confirmation Code
GFPayMeth	Must be one of "Credit Card", "Debit Card", "Other", "Business Check", "Personal Check"
GFCCType	"Visa" "MasterCard" "Amex" "Discover"
GFAck	Must be one of "Acknowledged", "Not Acknowledged", "Do Not Acknowledge"
GFAckDate	Date of Donation (If 'GFAck' DOES NOT EQUAL 'Acknowledged')
GFPPostStat	"Not Posted", "Posted", or "Do Not Post"
GFLtrCode	Determines if acknowledgement letter should be sent
GFAnon	YES/NO
GFAAttrCat00	"Gift Transmission"
GFAAttrDesc00	"Convio"
GFAAttrCom00	
GFAAttrDate00	Sync Date
GFAAttrCat01	"Convio Batch Number"
GFAAttrDesc01	Sync Timestamp
GFAAttrCom01	"Verified" or "Unverified"
GFAAttrDate01	Sync Date
GFAAttrCat02	"Tribute Type"
GFAAttrDesc02	"In Memory of" OR "In Honor of"
GFAAttrCom02	
GFAAttrDate02	Sync Date
GFAAttrCat03	"Tribute Name"
GFAAttrDesc03	<Honoree Title> + <Honoree Name>
GFAAttrCom03	
GFAAttrDate03	Sync Date
GFAAttrCat04	"Sustainer Payment Frequency" (All GFAAttr04 values would be Null if the gift is not a Sustaining Gift)
GFAAttrDesc04	i.e. "Payment 5 of 12" or "Payment 6 of ongoing commitment"
GFAAttrCom04	
GFAAttrDate04	Sync Date

GFNoteType00	"Tribute Gift Notice Address Info"
GFNoteDesc00	<Recipient Title> + <Recipient Name> (GFNote fields should be blank if gift is not a Tribute Gift)
GFNoteNotes00	<Recipient Street 1> /n <Recipient Street 2> /n <Recipient City> /n <Recipient State> /n <Recipient Zip>
GFAuthor00	"Donor Through Convio"
GFNoteType01	"Tribute Gift Notice Message Info"
GFNoteDesc01	YES/NO
GFNoteNotes01	<Message Body> /n /n <Message Closing> /n <Message Signature>
GFAuthor01	"Donor Through Convio"
GFImpID	Gift Import ID