

# Your Guide to Understanding Convio Database Connector to The Raiser's Edge®

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## Introduction

Synchronizing data between your online marketing database and offline donor database is the key to creating integrated outreach and fundraising campaigns that deliver immediate results and build lasting donor relationships. The Convio DataSync Connector RE (“the Connector”) enables you to exchange constituent and transactional data easily between the Convio Constituent360™ online marketing database and Blackbaud’s The Raiser’s Edge®.

The Connector uses two software components — one installed at Convio and the other inside your network — to form a secure communication bridge between The Raiser’s Edge and Constituent360.

With the Connector, your organization can:

- **Ensure high data integrity** by keeping information current and performing duplicate detection at multiple stages
- **Provide a richer online experience** for your constituents by pulling data from The Raiser’s Edge in real-time, resulting in higher engagement and loyalty
- **Obtain an up-to-date, complete view of your constituents** and their relationships with your organization
- **Achieve better campaign tracking** by linking offline and online campaigns
- **Simplify data management** processes

When used with Convio, the Connector offers nonprofits the most complete data integration solution available. This paper explores the capabilities and benefits of the Connector, how the data synchronization process works, and what is required for implementation. For more detailed information, please contact your Convio account executive or solutions engineer.

## Connector Benefits and Features

**Streamline data management.** Save administrator time, training and the need for sophisticated technical knowledge with an automated approach to data synchronization using a single process for handling file creation, bi-directional data transfer, duplicate management and error handling.

**Detect duplicates automatically.** When new constituents register online, the Connector searches your Raiser’s Edge database to detect possible matches and reduce duplicate records. Constituents engaging in the online channel are accurately linked to their offline record, ensuring that your organization can leverage all previous constituent activity in future campaigns.

**Recognize offline constituents.** Drive higher levels of engagement through a better online experience for your website visitors by instantly recognizing current constituents based on information stored in The Raiser's Edge, and personalize their experience by referring to them by name or automatically presenting them with members-only content, such as a member directory.

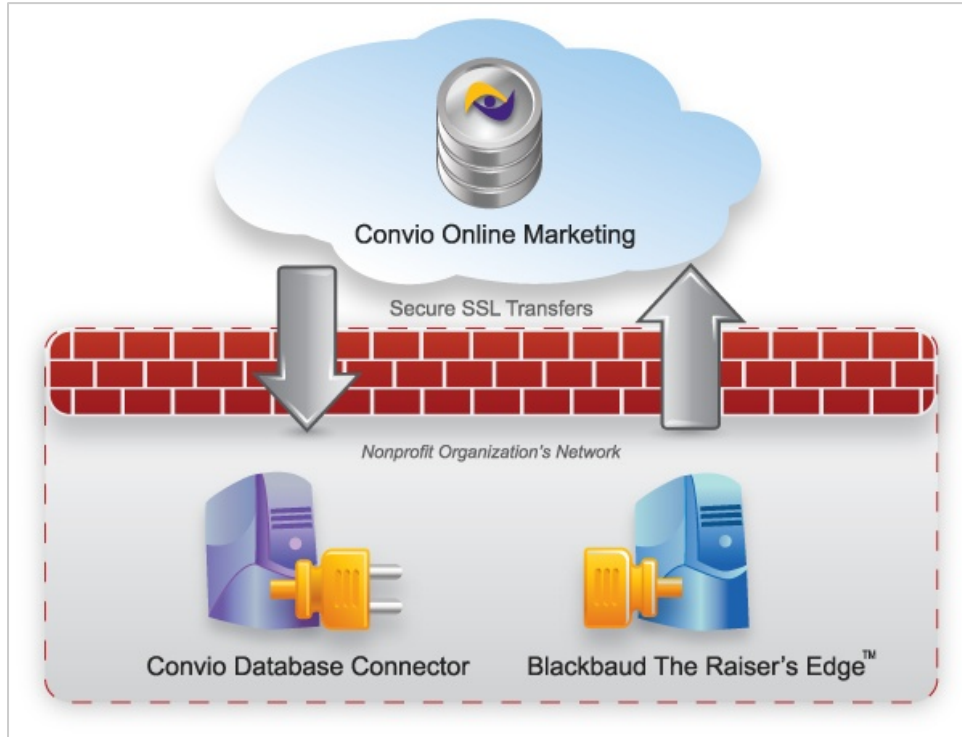
**Link online and offline campaigns.** Cross-reference tools allow your organization to automatically view new data elements such as campaigns or groups from your Raiser's Edge database, and to establish the relationship necessary to link and analyze your online and offline activity.

**Easily manage campaigns and groups.** Dynamic maintenance of groups or segments built in your Raiser's Edge database ensures that your organization always has the most accurate information.

**Provide real-time data updates.** Show constituents the most up-to-date record when they view their profile information online, including information that was updated offline.

## What is the Connector?

In simple terms, the Connector consists of two software components. One component is managed by Convio and the other component is installed on a dedicated computer inside your organization's network. Together, these two pieces of software serve as a communication bridge between The Raiser's Edge database and your Constituent360 online database. The two computers communicate with each other over any reliable high-speed Internet connection.



## Connector RE Solution Architecture

The Connector is built with highly reliable, proven software technologies. In technical terms, the Connector is a SOAP-based web services Application Program Interface (API). It is a Java application that uses JDBC for read-only access to The Raiser's Edge and runs within the Apache Axis implementation of the SOAP standard on top of Apache Tomcat as the server.

Convio recognizes that the data the Connector transfers over the Internet is sensitive, and has taken significant steps to ensure that this information is secure. All data transferred by the Connector is encrypted using the SSL (Secure Sockets Layer) protocol. In addition, every request from the Convio server to the Connector on your organization's machine requires username and password authentication. Finally, any attempt to access the Connector from outside of Convio will be blocked.

*"We initiate the data synchronization process every three days for standard gift volumes, increasing frequency as needed for spikes related to natural disasters and other high-traffic events. The entire process takes up to 30 minutes and allows me to better allocate my time."*

— Debbie Curran, Webmaster  
MAP International

## Data Synchronization Using the Connector

Data synchronization (“sync”) is the process of:

- Uploading new or modified offline constituent data from The Raiser’s Edge to the Convio Constituent360 online database; and
- Downloading new or modified online constituent data and transactions (e.g., donations) from Constituent360 to a PC in your network for import into The Raiser’s Edge.

An Administrator at your organization must perform four straightforward steps to complete a sync:

1. Initiate the sync process
2. Import files into The Raiser’s Edge
3. Cross-reference population
4. Reconcile duplicate records

### Step 1: Initiate the Sync Process

The administrator may either schedule a sync to initiate automatically on a regularly scheduled basis, or start it manually. Once the process is initiated, the following actions occur:

*Data extraction from The Raiser’s Edge.* The Connector automatically extracts constituent data from The Raiser’s Edge that has been created or modified since the last sync was run. This is a read-only process; no data is changed in The Raiser’s Edge.

*Transfer of data to Convio.* The data extracted from The Raiser’s Edge is transferred via a secure transfer protocol over the Internet to the Convio server and imported automatically into Constituent360.

*Export of new or modified constituent records and gift transactions.* New constituent online activity is extracted from Constituent360 and formatted into CSV files that can be easily imported into The Raiser’s Edge.

### Step 2: Import Files into The Raiser’s Edge

The Connector is “read-only”— it can obtain information from The Raiser’s Edge, but not insert, change or delete data in your database. This ensures you maintain complete control of the data that is added to your database of record. The files generated in the previous step must therefore be imported by your administrator into The Raiser’s Edge using the import utility supplied by Blackbaud®.

### Step 3: Cross-Reference Population

Cross-referencing ensures that gifts made online are accurately linked to the correct objects in The Raiser's Edge. Your administrator can easily cross-reference or map Convio objects (e.g., donation forms, campaigns, etc.) to the corresponding objects in The Raiser's Edge (e.g., Campaigns, Funds and Appeals). The Connector offers your administrator a real-time list of valid Raiser's Edge values within the Convio cross-reference administration utility.

#### Step 4: Reconcile Duplicate Records

When a new record is created online, two steps are taken to minimize the possibility of a duplicate entry being introduced into either Constituent360 or The Raiser's Edge:

- Constituent360 is checked for duplicates that might exist based on name, address and phone number; and
- The Connector checks the Raiser's Edge database for potential duplicates using the same combination of name, address and phone number. By directly reading the Raiser's Edge database, the duplicate detection algorithm takes advantage of the most complete and up-to-date constituent data available to provide high-quality duplicate detection.

All potential duplicates are thus caught *before* they enter either system and are withheld for administrator review resolution, without interrupting the overall process.

## Real-Time Data Retrieval: Enhancing the Online User Experience

In addition to synchronizing data between The Raiser's Edge and Convio databases, an important benefit of the Connector is that it can immediately retrieve data from The Raiser's Edge that is being requested by online Convio applications. This capability provides a richer user experience for your website visitors.

The Connector actively "listens" for calls (over the Internet) from Convio software. When it receives one of these calls, it connects to The Raiser's Edge, retrieves the appropriate data and automatically transfers it to Convio in real-time. Scenarios in which this happens include: When constituents register online, the Connector will search The Raiser's Edge for potential matches to avoid creating duplicate records. If the constituent already has profile information stored in The Raiser's Edge, his or her online profile can be auto-populated using this information.

Registered website visitors can enjoy a personalized experience based on information stored in The Raiser's Edge database. For example, they can be greeted by name.

When they view their profile online, registered website visitors will see their most up-to-date records, including information that was updated offline.

There will be minimal impact to a website visitor's online experience should The Raiser's Edge be temporarily unavailable. Calls are made from one system to the other only when data is

needed. Any inability to connect to The Raiser's Edge will never prevent a constituent from completing his or her intended action online.

## Use Cases: The Connector in Action

The range of ways in which the Connector can streamline your data management processes, improve your website visitors' online experiences, and open up a wealth of opportunities in integrated marketing and fundraising campaigns is boundless. The following simplified use cases help illustrate the power of the Connector.

### Synchronizing User Profiles

Cindy, an offline constituent with no email address on file, makes her first online donation. Her profile information and transaction detail are captured by the Connector, formatted into CSV files, and then transferred to the Connector server in your organization's network, ready for import into The Raiser's Edge.

### Using Prior Giving History Effectively

Jason, a constituent with both online and offline database records, makes an offline donation on March 1st. You record his gift details in The Raiser's Edge, and the Connector updates Jason's records in Convio. Then, on March 2nd, you create an email appeal in Convio and exclude all donors with a last gift date since February 1st so that you will not inappropriately ask donors like Jason for a gift soon after they made one.

### Leveraging Multi-Channel Segmentation

The Connector maintains a real-time link between The Raiser's Edge segments and Convio groups. Administrators can create and modify segments in The Raiser's Edge that are automatically available within Convio for any group-based segmentation. To take advantage of this, Jack, your Development Director, wants to send an email appeal to three offline database segments that incorporate multiple criteria. Jack crafts his email in Convio, and then selects groups related to the offline segments. His online groups are then automatically rebuilt with the latest Raiser's Edge segment information.

## Implementing the Connector

To implement the Connector at your organization's site, Convio recommends you engage the assistance of your information technology (IT) staff or that of an outside vendor. Depending on your available IT resources, you may need to purchase a server-class computer to run the

### Case Study: Conservation International

With Connector RE, the organization has an efficient, easy-to-use system that satisfies the organization's data management requirements

**33%** more time saved by having

Connector synchronize data between Convio Online Marketing and The Raiser's Edge

**95%** more time saved by having the

capability to see into the RE side and map to pre-defined segments rather than manually populating the fields



Connector software at your site. For detailed system requirements, please ask your Convio account executive or solutions engineer for a copy of the *Connector RE Specification Sheet*. In addition, for data security reasons, the Connector software must be installed behind your organization's firewall, which should be configured to allow communication only with Convio. The specifics of how to set up the firewall will depend on your organization's specific hardware, and Convio will provide guidance on this during the implementation process. No additional Raiser's Edge modules are required to run the Connector.

## Additional Resources

For a Fact Sheet, online demo, recorded webinar and other sources of information about the Connector RE, please visit: <http://www.convio.com/datamanagement>

### About Convio

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. The company's online marketing suite offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value-added services and applications focused on the unique needs of nonprofit organizations.



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