Data Tune-up Guide

07/13/2021Blackbaud Altru 4.96 Data Tune-up US

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Contents

Data Tune-Up 4
Edit Data Tune-Up Settings 4
Finder Settings 5
Verify Default Batch Templates 6

AddressFinder Process 8
AddressFinder Process Page 10
Edit the Criteria for Constituents Included in an AddressFinder File 10
Create an AddressFinder File Process 11
Download Exceptions for an AddressFinder Create File Process 12
Submit the AddressFinder File 13
Check the Availability of an AddressFinder File 13
Start an AddressFinder Retrieval Process 14
View AddressFinder Reports 14
Edit AddressFinder Batch Options 14
Commit AddressFinder Batch 16

DeceasedRecordFinder Process 17
Manage Global Rules and Options for Deceased Constituents 17
Add a DeceasedRecordFinder Process 18
DeceasedRecordFinder Process Page 20
Edit the Criteria for Constituents Included in a DeceasedRecordFinder File 20
Create a DeceasedRecordFinder Process 21
Submit the DeceasedRecordFinder File 22
Check the Availability of a DeceasedRecordFinder File 22
Start the DeceasedRecordFinder Retrieval Process 22
DeceasedRecordFinder Batch 23

Data Tune-Up

Edit Data Tune-Up Settings 4
Finder Settings 5
Verify Default Batch Templates 6

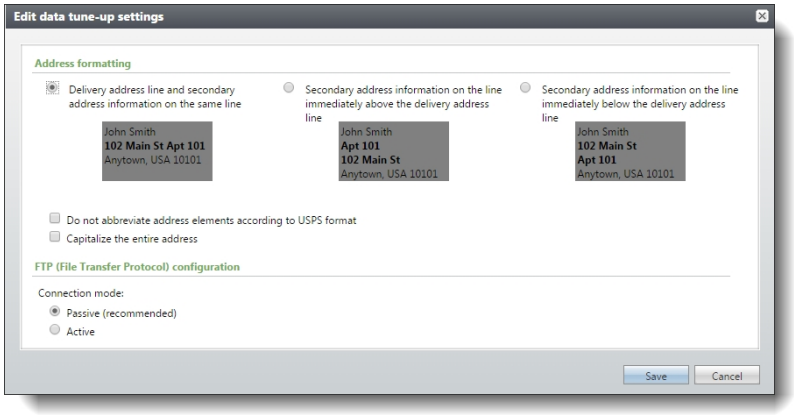
Accurate constituent information is important to ensure your mailings reach the intended recipients and to retain existing donors. When your database is clean and accurate, you can spend more time on your organization's purpose and goals.

Edit Data Tune-Up Settings

Before you update your address information, make sure the secondary address formats, abbreviation, and capitalization settings are set as required by your organization.

Edit the data tune-up address settings

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Under **Configuration**, click **Data tune-up settings**. The Edit data tune-up settings screen appears.



3. Under **Address formatting**, select how to display secondary address lines such as apartment numbers.
4. To not automatically abbreviate address information to satisfy the United States Postal Service (USPS) standard, select **Do not abbreviate address elements according to USPS format**. If

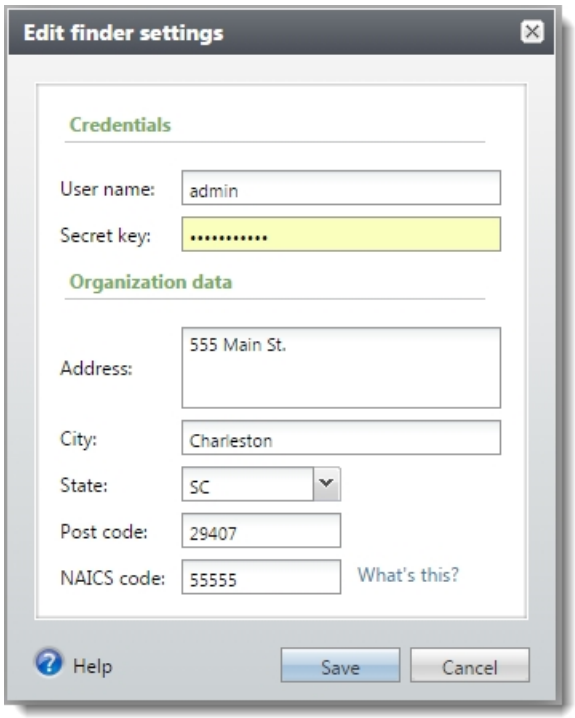
you do not select this checkbox, address updates return in the same format as the original data file.

5. To display addresses in all capital letters, select **Capitalize the entire address**. If you do not select this checkbox, address updates return in an initial capitalization format.
6. The **FTP (File Transfer Protocol) configuration** option defaults to **Active**. When you select **Active**, a Blackbaud server initiates the FTP connection. This can sometimes result in the server attempting to connect through a port on your network that is blocked from outside access by your firewall. When you select **Passive**, your web server initiates the FTP connection. This ensures that the FTP process uses a port on your network that allows file transfers. If you receive an error when you attempt to submit the file, change this option to **Passive** and submit the file again.
7. Click **Save**. You return to the Data Tune-Up page.

Finder Settings

Note: If you experience an error when trying to submit your data to Blackbaud, please review the ***Blackbaud CRM*** system requirements to ensure that your firewall settings are correct.

To protect data during transfers, credentials are required to run AddressFinder processes. These credentials are entered on your behalf when you subscribe to a Data tune-up service. This is a one-time task—you won't need to update the key in the future. Before running AddressFinder for the first time, we recommend that you open the finder settings screen to review your organization's address and update the NAICS code to match your business. To access this screen, from the Data Tune-Up page in *Administration*, click **Finder settings** under **Configuration**.



Verify Default Batch Templates

To run Data Tune-Up processes, you must use the default batch template for each process. To verify the batch templates exist, from *Administration*, **Batch**, select **Batch entry**, then select **Batch Templates** under Configuration. Verify that the following templates are active:

- AddressFinder Batch
- DeceasedRecordFinder Batch

If a template does not appear in the list, first update filters to include inactive templates. If a template is inactive, expand the row and select **Mark active** to restore it. If it still does not appear, contact Blackbaud Support for assistance.

AddressFinder Process

AddressFinder Process Page 10
Edit the Criteria for Constituents Included in an AddressFinder File 10
Create an AddressFinder File Process 11
Download Exceptions for an AddressFinder Create File Process 12
Submit the AddressFinder File 13
Check the Availability of an AddressFinder File 13
Start an AddressFinder Retrieval Process 14
View AddressFinder Reports 14
Edit AddressFinder Batch Options 14
Commit AddressFinder Batch 16

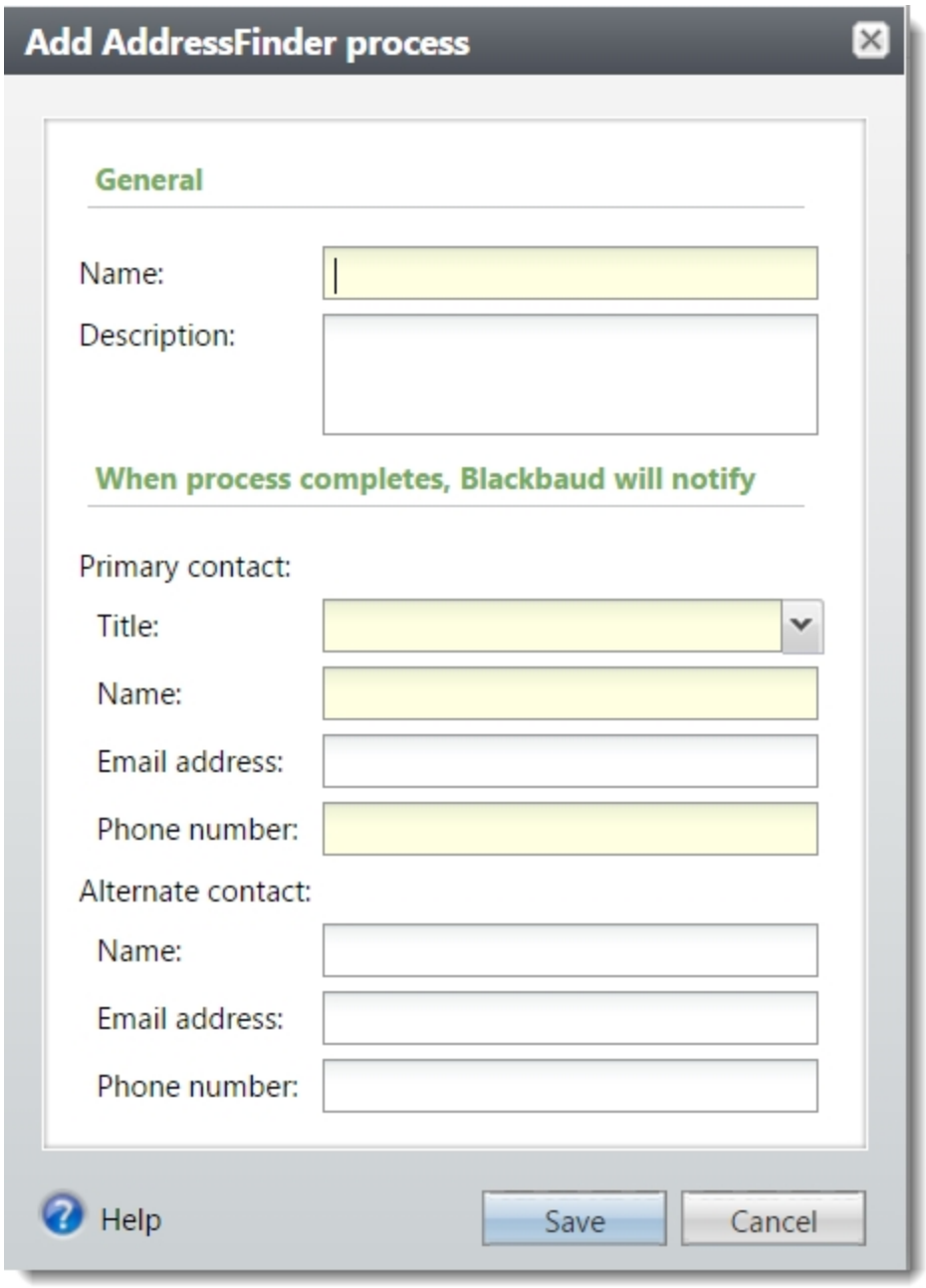
AddressFinder helps you keep up with the 40 million Americans who change their address each year. The process provides the most current address information available on your constituents, based on the United States Postal Service's *NCOALink* database.

After you activate your subscription, you can use *AddressFinder* to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. You submit and retrieve information for a process from the process page. For information about the items on the process page, refer to AddressFinder Process Page on page 10.

Warning: *AddressFinder* submits only addresses that match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match the USPS NCOA formats generate exceptions when you submit the *AddressFinder* file to Blackbaud. For information about how to view and manage these exceptions, refer to Download Exceptions for an AddressFinder Create File Process on page 12.

Add an AddressFinder process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the AddressFinder tab.
3. Under **AddressFinder process**, click **Add**. The Add AddressFinder process screen appears.



4. Under **General**, enter a unique name and description to help identify the process.
5. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted addresses.

Note: For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

6. Click **Save**. The program automatically creates the process and displays its process page. For information about the items on the process page, refer to AddressFinder Process Page on page 10.

AddressFinder Process Page

When you create an *AddressFinder* process, the program automatically generates a page for the process. To access the process page from the AddressFinder tab on the Data Tune-Up page, click the name of the process under **AddressFinder process**.

At the top of the process page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

From the process page, you can walk through the steps to run *AddressFinder*.

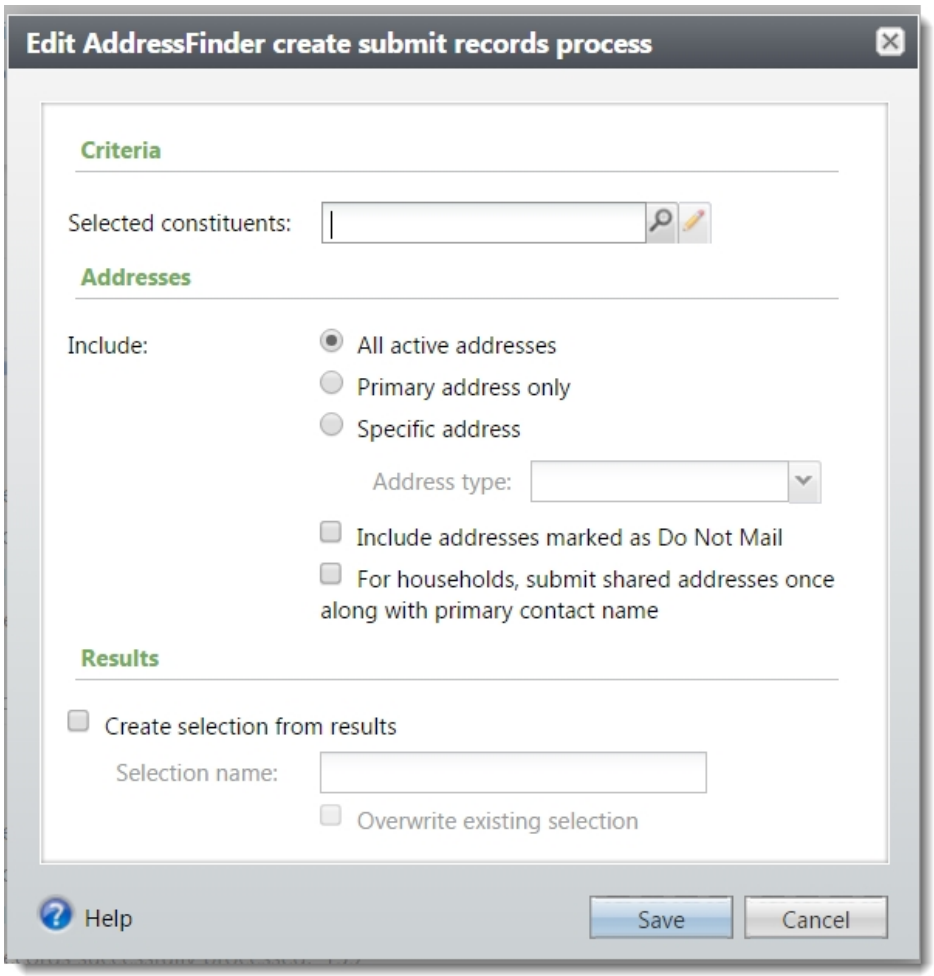
- Step 1: Create the file of the constituents and addresses to check for updated addresses.
- Step 2: Submit the data file to Blackbaud.
- Step 3: After Blackbaud updates the address information in the submitted data file, you can run the retrieval process to transfer the updated file from Blackbaud to a batch in your database. Review the report to make sure the batch is correct.
- Step 4: Commit the batch to update your constituent records with new address information.

Edit the Criteria for Constituents Included in an AddressFinder File

When you create an *AddressFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify updated national change of address (NCOA) information. To include only a select group of constituents in the process or base the identification process on an address other than the primary address, you must edit the process criteria.

Edit the critieria for constituents included in an AddressFinder file

1. From the AddressFinder tab, select the process to run.
2. Under **Step 1: Create file**, click **Edit**. The Edit AddressFinder create submit records process screen appears.



3. Under **Criteria**, choose the selection of constituents to include in the process.
4. Under **Addresses**, select which addresses to include in the process—active addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include in the **Address type** field.
5. Select whether to include addresses marked as Do Not Mail and whether to submit shared addresses only once for households included in the process.
6. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
7. Click **Save**. You return to the process page.

Create an AddressFinder File Process

To update your addresses with national change of address (NCOA) information, you must create the file of the constituents and addresses to check for updated addresses.

Tip: Before you create an AddressFinder file, you may want to check your Data tune-up settings. For more information, see Edit Data Tune-Up Settings on page 4.

Note: To conform with USPS requirements, the AddressFinder process requires a minimum of 100 address records to submit the file. If you try to submit a smaller file, you will receive an error. Adjust the process filters to include more addresses.

Warning: *AddressFinder* excludes addresses that do not match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match these requirements generate exceptions when you create the file. For information about how to view and manage these exceptions, refer to Download Exceptions for an AddressFinder Create File Process on page 12.

Create an AddressFinder file

Note: When you create an *AddressFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify updated national change of address (NCOA) information. To include only a select group of constituents in the process or to base the identification process on an address other than the primary address, click **Edit** under **Step 1: Create file**. For more information, see Edit the Criteria for Constituents Included in an AddressFinder File on page 10.

1. From the AddressFinder tab, select the process to run.
2. Under **Step 1: Create File**, click **Start process** to create the data file. After the file processes, **Step 1** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

Note: Addresses that do not match the required USPS NCOA formats will generate exceptions. You can download the exceptions file to view which constituents were excluded. Then you can make corrections to addresses on their constituent records and recreate the file before you submit it. For more information, see Download Exceptions for an AddressFinder Create File Process on page 12.

Download Exceptions for an AddressFinder Create File Process

When you create an *AddressFinder* data file, the process only includes addresses that match the United States Postal Service (USPS) National Change of Address (NCOA) standardized formats. *AddressFinder* cannot submit street addresses that exceed two lines or 50 characters or city names that exceed 28 characters. Addresses that do not match the USPS NCOA formats generate exceptions.

From the *AddressFinder* process page, you can download these exceptions as a comma-separated values (*.csv) file or a Microsoft *Office* open XML spreadsheet (*.xlsx) file to view in another program such as Microsoft *Excel*. You can make corrections to addresses on the constituent record and recreate the file before you submit it.

Download AddressFinder create file process exceptions

1. From the AddressFinder tab, select the process to run.
2. On the process page, under **Step 1: Create file**, click **Download exceptions** and select the format of the file to download

   To download the exceptions as a comma-separated values file, select **Download to CSV**.To download the exceptions as a spreadsheet file, select **Download to XLSX**.
3. On the Save As screen, browse to the location to save the file and enter a file name to help identify the exception file.
4. Click **Save**. The browser downloads the file to the selected location. When the download completes, select whether to open or save the exception file.

Submit the AddressFinder File

After you create the AddressFinder data file, you must run the submit process. This process sends the file to Blackbaud to update addresses.

Note: To conform with USPS requirements, the AddressFinder process requires a minimum of 100 address records to submit the file. If you try to submit a smaller file, you will receive an error. Adjust the process filters to include more addresses.

Submit an AddressFinder file to Blackbaud

1. From the AddressFinder tab, select the process to run.
2. Under **Step 2: Submit file to Blackbaud**, click **Start process**. A screen appears with a Processing Acknowledgement Form (PAF). To provide consent to run the process, select **Please acknowledge that Blackbaud is processing your data through the USPS NCOALink dataset** and click **OK**. For more information on the United States Postal Service PAF policies, see http://kb.blackbaud.com/articles/Article/105383.
3. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. After the submission processes, **Step 2** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

Check the Availability of an AddressFinder File

You can check the availability of a pending update file at any time. On the process page, click **Check file availability** under **Step 3: Get file from Blackbaud** . This will enable the rest of the options under **Step 3** so you can retrieve the file. For information about how to retrieve the file, refer to Start an AddressFinder Retrieval Process on page 14.

Start an AddressFinder Retrieval Process

The retrieval process transfers the updated file from Blackbaud to a batch in your database. To run the retrieval process, click **Start process** under **Step 3: Get file from Blackbaud**. After the file processes, **Step 3** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

Remember to review the AddressFinder report to make sure the batch is correct. For more information, see View AddressFinder Reports on page 14.

View AddressFinder Reports

After you run the retrieval process and retrieve the updated file from Blackbaud, you can access the AddressFinder Report. This report provides information about the addresses included in the process and indicates which addresses returned change of address information in the update file. To view the AddressFinder Report, on the process status page, click **View report** under **Step 3**.

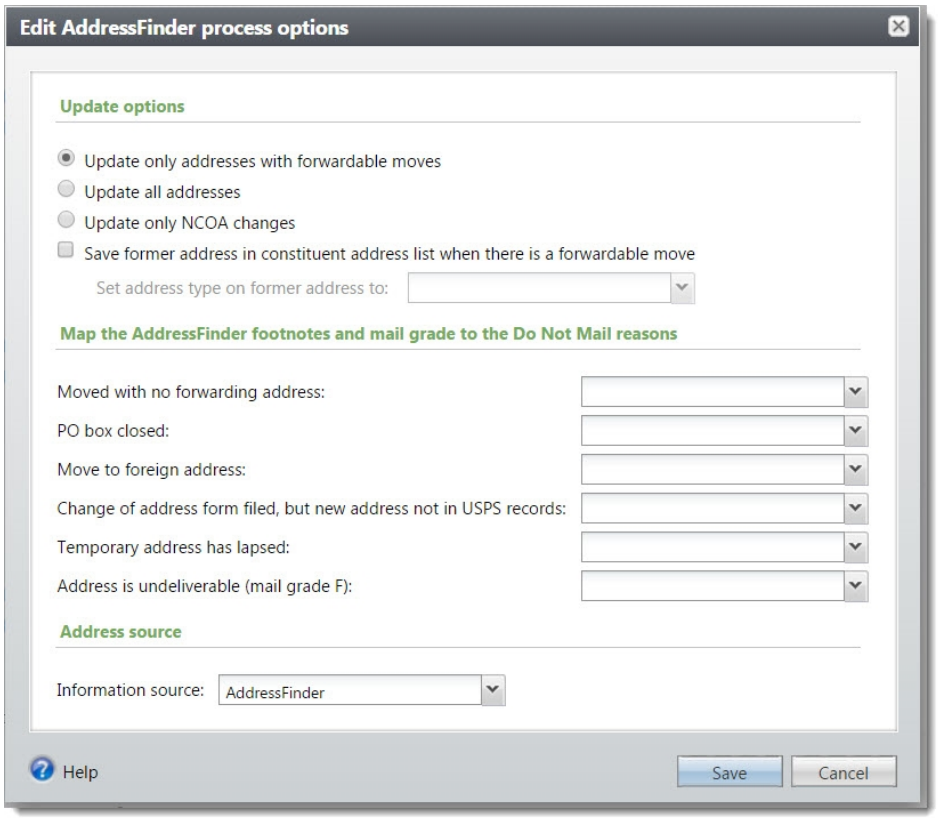
Note: The **Field changed** column displays changes to these address fields: **Address Block**, **City**, **State**, **Country**, and **Post Code**.

Edit AddressFinder Batch Options

Before you commit an *AddressFinder* batch, you should select process options such as which addresses to update and whether to retain the former address when the process includes a forwardable move. You can also select how to handle each footnote code received from the United States Postal Service (USPS) during an *AddressFinder* process. When you commit an *AddressFinder* batch, the program updates the constituent records with the new or updated addresses, Do Not Mail reasons, and the selected source.

Edit the properties for an AddressFinder batch

1. From the AddressFinder tab, select the process to run.
2. Under **Step 4: Update addresses**, click **Edit properties**. The Edit AddressFinder process options screen appears.



3. Under **Update options**, select whether to update all addresses with change of address information, only those with forwardable moves, or only those with NCOA changes.
4. To save the former address of a constituent with a forwardable move address change, select **Save former address in constituent address list when there is a forwardable move**. In the **Set address type on former address to** field, select the address type to apply to the former address, such as Former.
5. Under **Map the AddressFinder footnotes and mail grade to the Do Not Mail reasons**, select the Do Not Mail reason codes to associate with the NCOA footnote codes and mail grade received from the USPS during an *AddressFinder* process. You can choose Incomplete, Invalid, Moved, or to leave the reason blank.

Note: If you select **Update all addresses** under **Update options** and an address returns an NCOA footnote code other than Forwardable move, the program automatically marks the address as Do Not Mail when you commit the *AddressFinder* batch. To mark an address as Do Not Mail, the program selects **Do not send mail to this address** for the address and displays the selected reason code.

6. Under **Address source**, select the default information source to use for *AddressFinder* updates, such as NCOA or AddressFinder. When the process updates contact information, the program applies this information source to the constituent address information.
7. Click **Save**. You return to the process page.

Commit AddressFinder Batch

When you retrieve the updated file from Blackbaud, the program generates an *AddressFinder* batch with the National Change of Address (NCOA) information included in the file. To update your records with the NCOA information, you must commit the batch. Before you commit, we recommend you review the possible changes. The batch lists all constituents included in the update file, along with the former address information, new address information, and other information about the update process. When you review the update file, you can edit the information as necessary.

To review and/or edit the batch, under **Step 4: Update Addresses**, click **Edit Batch**. Once you have confirmed the changes, click **Commit batch** to commit the records in the batch to your database. After the batch committal processes, **Step 4** displays the number of records processed, the number of exceptions, and total number of records that were successfully updated.

Note: For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.

DeceasedRecordFinder Process

Manage Global Rules and Options for Deceased Constituents 17
Add a DeceasedRecordFinder Process 18
DeceasedRecordFinder Process Page 20
Edit the Criteria for Constituents Included in a DeceasedRecordFinder File 20
Create a DeceasedRecordFinder Process 21
Submit the DeceasedRecordFinder File 22
Check the Availability of a DeceasedRecordFinder File 22
Start the DeceasedRecordFinder Retrieval Process 22
DeceasedRecordFinder Batch 23

DeceasedRecordFinder helps you keep track of deceased constituents in your database. The process scans all constituents in a submitted data file to identify deceased constituents, based on the names and addresses in the file. To view and manage the *DeceasedRecordFinder* process for your organization, select the DeceasedRecordFinder tab.

Once you activate your subscription, you can start to use Data Tune-Up to submit information for updates. You can create and submit to Blackbaud files that contain the data to update, and you can import and update your records with the new information. To access a process page, select the process in the grid and click **Go to process**. For information about the items on the process page, refer to DeceasedRecordFinder Process Page on page 20.

Manage Global Rules and Options for Deceased Constituents

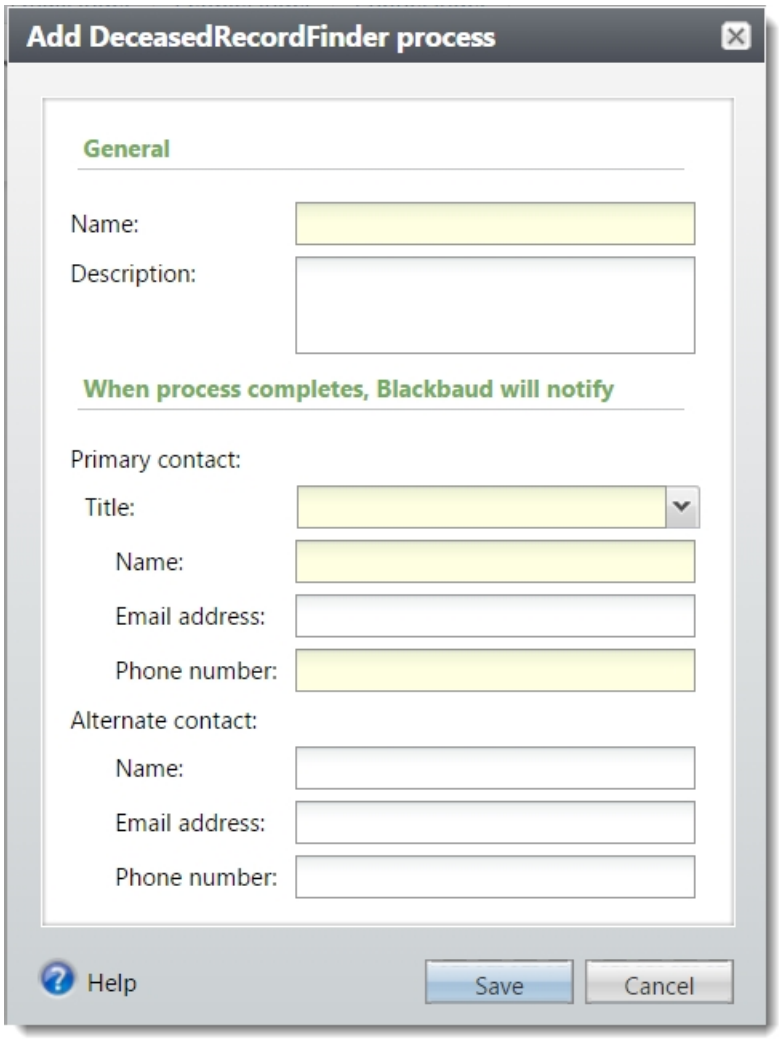
Before you run the *DeceasedRecordFinder* process, you should verify your organization's global rules and options for deceased constituents. These settings determine what constituent information is automatically updated when the process marks a constituent as deceased. For example, the program can automatically mark a deceased constituent as inactive so they do not appear in searches. You can also configure the program to display a Deceasing Options page so you can update a constituent's relationships, constituencies, and other information after the constituent is marked as deceased.

To view or make changes to these settings, from *Constituents*, select **Life changes** under **Configuration**. The Manage Life Changes page appears.

- Under **Global rules for deceased constituents**, you can view which settings are set to automatically apply when a constituent is marked as deceased. To make changes, select **Edit**. Choose which options to automatically apply when a constituent is marked as deceased, then **Save**. For more information about items on this screen, see Edit Global Rules for Deceased Constituents Screen.
- Under **Options for deceased constituents**, you can view which information is set to display on the Deceasing Options page that appears when a constituent is marked as deceased. Information on this page must be updated manually. To make changes, select **Edit**. Choose which information appears on the Deceasing Options page, then **Save**. For more information about items on this screen, see Edit Options for Deceased Constituents Screen.

Add a DeceasedRecordFinder Process

1. From *Administration*, click **Data tune-up**. The Data Tune-Up page appears.
2. Select the DeceasedRecordFinder tab.
3. Under **DeceasedRecordFinder process**, click **Add**. The Add DeceasedRecordFinder process screen appears.



4. Enter a unique name and description to help identify the process and the information it includes.
5. Under **When process completes, Blackbaud will notify**, enter the names, phone numbers, and email addresses of the individuals at your organization Blackbaud should contact with questions about submitted constituent information.

Note: For *AddressFinder* and *DeceasedRecordFinder*, you will not receive notification from Blackbaud when your updated file is available. Simply check back on the process status page to determine if the file is ready.

6. Click **Save**. The program automatically creates the process and displays its process page. For information about the items on the process page, refer to DeceasedRecordFinder Process Page on page 20.

DeceasedRecordFinder Process Page

When you create a *DeceasedRecordFinder* process, the program automatically generates a page for the process. To access the process page from the DeceasedRecordFinder tab on the Data Tune-Up page, click the name of the process under **DeceasedRecordFinder process**.

At the top of the process page, you can view information about the process, such as when it was last run, the addresses and constituents included in the process, and its description. You can also view whether the program creates an output selection when you run the process.

From the process page, you can walk through the steps to run *DeceasedRecordFinder:*

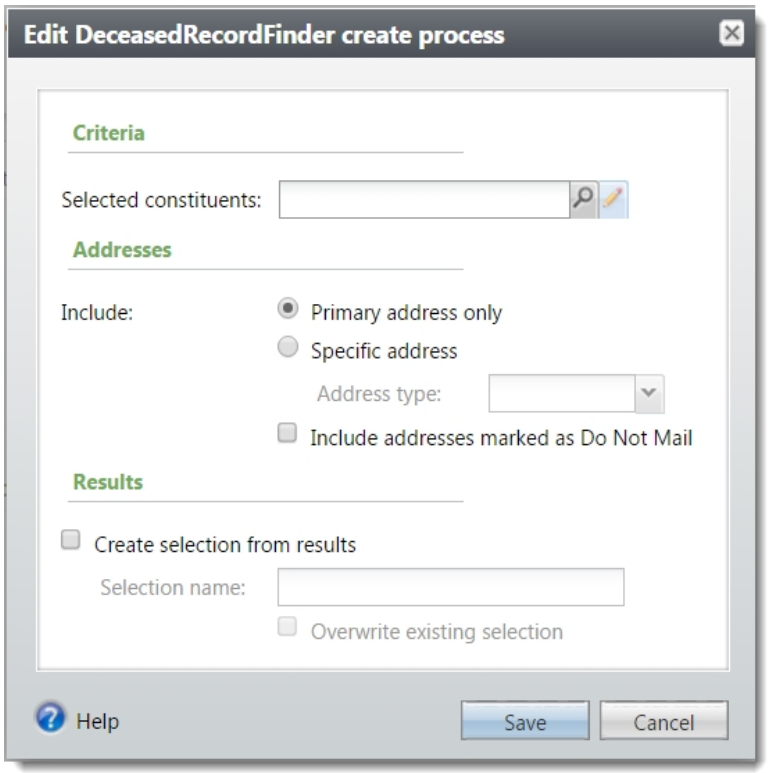
- Step 1: Create the file of the constituents and addresses to check for deceased constituents.
- Step 2: Submit the data file to Blackbaud.
- Step 3: After Blackbaud updates the deceased information in the submitted data file, you can run the retrieval process to transfer the updated file from Blackbaud to a batch in your database.
- Step 4: Commit the batch to update your records with the deceased constituents information. After committing the batch, you can view a list of records included in the batch with information about when they were marked deceased.

Edit the Criteria for Constituents Included in a DeceasedRecordFinder File

When you create a *DeceasedRecordFinder* process, the process automatically includes all constituents with their primary address information. The process uses a combination of the constituent names and address information to identify deceased constituents. To include only a select group of constituents in the process or base the identification process on an address other than the primary address, you must edit the submit process.

Edit the critieria for constituents included in a DeceasedRecordFinder file

1. From the DeceasedRecordFinder tab, select the process to run.
2. Under **Step 1**, click **Edit**. The Edit DeceasedRecordFinder create process screen appears.



3. Under **Criteria**, choose the selection of constituents of constituents to include in the process.
4. Under **Addresses**, select which addresses to include in the process—active addresses, only primary addresses, or addresses of a specific type. If you select **Specific address**, select the type of the address to include in the **Address type** field.
5. Select whether to include addresses marked as Do Not Mail.
6. Under **Results**, select whether to create a selection of the constituents included in the process. If you select **Create selection from results**, in the **Selection name** field, enter a name to help identify the selection. To replace any existing selection with the same name when the program creates the selection, select **Overwrite existing selection**.
7. Click **Save**. You return to the process page.

Create a DeceasedRecordFinder Process

To update your constituents with deceased status changes, you must create a file of the constituents and addresses to check for deceased constituents.

Tip: Before you create an DeceasedRecordFinder file, you may want to check your Data tune-up settings. For more information, see Edit Data Tune-Up Settings on page 4.

Create a DeceasedRecordFinder file

1. From the DeceasedRecordFinder tab, select the process to run.

2. Under **Step 1: Create File**, click **Start process** to create the data file. After the file processes, **Step 1** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.
3. Under **Step 2**, click **Start process**. The Run DeceasedRecordFinder submit process screen appears. The items on this screen are the same as the Edit DeceasedRecordFinder submit process screen. For information about the items on this screen, refer to Edit the Criteria for Constituents Included in a DeceasedRecordFinder File on page 20.
4. Edit the information as necessary.
5. Click **Start**. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. The status page for the change of address submit process appears.
6. For information about the process status page, refer to Data Tune-Up Process Status Page on page 1.

Submit the DeceasedRecordFinder File

After you create the DeceasedRecordFinder data file, you must run the submit process. This process sends the file to Blackbaud to find deceased constituents.

Submit a DeceasedRecordFinder data file to Blackbaud

1. From the DeceasedRecordFinder tab, select the process to run.
2. Under **Step 2: Submit file to Blackbaud**, click **Start process**. The program submits the data file of constituent and address information and your organization contact information to Blackbaud. After the submission processes, **Step 2** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

Check the Availability of a DeceasedRecordFinder File

You can check the availability of a pending update file at any time. On the process page, click **Check file availability** under **Step 3: Get file from Blackbaud** . This will enable the rest of the options under **Step 3** so you can retrieve the file. For information about how to retrieve the file, refer to Start the DeceasedRecordFinder Retrieval Process on page 22.

Start the DeceasedRecordFinder Retrieval Process

The retrieval process transfers the updated file from Blackbaud to a batch in your database. To run the retrieval process, click **Start process** under **Step 3: Get file from Blackbaud**. After the file processes, **Step 3** displays the number of records processed, the number of exceptions, and total number of records that were successfully included in the file.

DeceasedRecordFinder Batch

When you retrieve the updated file from Blackbaud, the program generates a *DeceasedRecordFinder* batch with the deceased status information included in the file. To update your records with the information, you must commit the batch. Before you commit, we recommend you review the possible changes. The batch lists all constituents included in the update file, along with their lookup IDs, submitted address information, deceased dates, and the method by which the information was confirmed. When you review the update file, you can edit the information as necessary.

To review and/or edit the batch, under **Step 4: Update Addresses**, click **Edit Batch**. Once you have confirmed the changes, click **Commit batch** to commit the records in the batch to your database. After the batch committal processes, **Step 4** displays the number of records processed, the number of exceptions, and total number of records that were successfully updated.

After you commit the batch, you can click **Review deceased** to view a list of all records included in the batch. The Confirmation column displays *** and the Reviewed column displays***

Note: For information about how to edit or commit a batch, refer to the *Batch and Import Guide*.