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With the Sphere Connector, you can synchronize information between Blackbaud Sphere and The Raiser’s Edge. You determine whether to transfer data in one or both programs based on your organization’s needs. For example, you can configure the Sphere Connector to export information in The Raiser’s Edge to Blackbaud Sphere to take advantage of Sphere’s online marketing capabilities, then import information entered online in Blackbaud Sphere to new or existing records in The Raiser’s Edge to manage constituent relationships.

This guide explains how to install and configure the Sphere Connector to successfully import supporter records from Blackbaud Sphere and how to process this information to create or update constituent records in The Raiser’s Edge. For information about how to map The Raiser’s Edge fields to fields in Blackbaud Sphere, import information from The Raiser’s Edge, and remove duplicate records from the Sphere database, see the Sphere online Help.

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- “Configure The Raiser’s Edge” on page 12
Pre-installation Considerations

This section explains the requirements you must meet before you install the Sphere Connector. Failure to follow the pre-installation guidelines may result in error messages when you run the installation program. Please consider these items and read this guide before you begin the installation process.

Network Requirements

- You must have an internet connection and Internet Explorer 7.0 or higher. The Sphere Connector provides a web-based, bi-directional data exchange between The Raiser’s Edge and Blackbaud Sphere.
- You must have access to an external file transfer protocol (FTP) site.

Server/Workstation Requirements

- You must have Microsoft .NET Framework 3.5 installed.
- You must have Microsoft SQL Server Express, SQL Server 2005 Standard or Enterprise with Service Pack 1 or higher, or SQL Server 2005 64-bit Standard or Enterprise with Service Pack 1 or higher.

**Warning:** SQL Server Express 2005 and 2008 are not supported if you have Blackbaud NetCommunity installed with The Raiser’s Edge.

- You must have Windows XP Professional with Service Pack 2 or higher, Windows Vista (Business, Ultimate, Enterprise) with Service Pack 1, or Windows 7 Professional.
- You must have a minimum of 25 MB of free disk space to install the Sphere Connector.

**Note:** The Sphere Connector Windows Service stores synchronization data logs in the [installation folder]/service/data folder. The Sphere Connector stores data logs in the [installation folder]/Sphere/data folder. Depending on the amount of disk space you have, you may need to purge these data logs at least every ninety days.

- Fully understand and meet The Raiser’s Edge system requirements. For detailed system requirements, go to www.blackbaud.com/files/support/guides/sysreqs/re7.pdf. System requirements change often, so we strongly recommend you review the website frequently for updates.
- For workstation installations, you must have The Raiser’s Edge version 7.91 or higher installed.
- For server installations with Microsoft Windows 2008 Server or 64-bit Windows 2008 Server, you must have The Raiser’s Edge version 7.91 or higher installed.
- Verify that the workstation or server on which you installed The Raiser’s Edge has the current time. The Sphere Connector uses strict time-matching criteria for the synchronization process.
- Before you install the Sphere Connector, we recommend you back up each server and workstation.
- If you receive error messages after you complete the installation, temporarily disable any virus scan and screen saver programs on the server and workstations and re-install the program.
We recommend you close the Microsoft Office toolbar, if present. It may interfere with the installation of some files.

We recommend you exit all Windows applications on the workstations where you will install the Sphere Connector.

*Note:* When you install the Sphere Connector, you select whether to use Windows or SQL Server authentication to connect to the database. To use Windows authentication, you must log in as a system administrator on a network account.

Install the latest service pack for your version of Windows. Visit the Microsoft website at www.microsoft.com to access the service packs.

**Security Requirements**

During the installation process, you install the Sphere Connector Service on a server with access to The Raiser’s Edge. You must have Windows system administrator privileges on this server to register The Raiser’s Edge with Blackbaud Sphere after you finish the installation. For information about this process, see “Register The Raiser’s Edge with Blackbaud Sphere” on page 20.

You must also assign Windows system administrator privileges to the server where you installed the Sphere Connector Service for all users who need to create a synchronization schedule and perform on-demand synchronizations with the Blackbaud Sphere Connector.

*Note:* If you do not want to grant Windows system administrator privileges to multiple users, after you complete the installation process, you can create a synchronization schedule to automatically synchronize information at specific intervals. Users who do not have administrator privileges can access information and view updates once the scheduled synchronization occurs; however, only users with the proper security rights can synchronize the information on demand. For information about how to schedule synchronizations, see “Create a Synchronization Schedule” on page 25.

**Scheduling Considerations**

Consider the number of records you need to synchronize. During one synchronization, the Sphere Connector can process a maximum of 5,000 records from Blackbaud Sphere and a maximum of 10,000 records from The Raiser’s Edge.

Consider the amount of time required to complete the synchronization. It takes approximately one hour to transfer 5,000 records from Blackbaud Sphere to The Raiser’s Edge and 10,000 records from The Raiser’s Edge to Blackbaud Sphere. This estimate may vary based on the amount of data to process, network speed, and other factors.
Other Considerations

- We recommend you create a dedicated user account for the Sphere Connector. In Blackbaud Sphere, administrators must create a new password every three months. If you use an administrator’s user name and password to configure the Sphere Connector, when this password expires, the synchronization will fail and you must reconfigure the Connector with the updated user login. To avoid this issue, you can create a user account to access the Sphere Connector only. As long as you do not use this account to log into Blackbaud Sphere, the expiration rule does not apply. For information about how to create users in Blackbaud Sphere, see the Sphere online Help.

- After you install the Sphere Connector components, you can assign security access to the Sphere page in The Raiser’s Edge. From Administration in The Raiser’s Edge, select Security. Select Sphere under Group Privileges on the New Group screen to grant access to the Sphere link on The Raiser’s Edge bar. Members of this group can access the information imported from Blackbaud Sphere.

- To configure Blackbaud Sphere, we recommend you access the application online at www.kintera.com. Click Client Login and enter your login name and password. When you access Blackbaud Sphere from the Sphere page in The Raiser’s Edge, your session times out after twenty minutes of inactivity. If you attempt to enter new data in Blackbaud Sphere after your session times out, an error message appears. You must log in again to continue.
Installation and Configuration Overview

Before you install the Sphere Connector components, you must log into Blackbaud Sphere and activate the Kintera Connect API. You perform this task only once. After you accept the Kintera Connect terms, you determine whether to synchronize data in two directions or in one direction from the Connector Sync page in Blackbaud Sphere. You can then configure The Raiser’s Edge to determine how to process Blackbaud Sphere transactions. Next, you register The Raiser’s Edge with Blackbaud Sphere. During the registration, The Raiser’s Edge submits a list of fields to Sphere. When you complete the configuration process, you will use this information to create custom mappings. You can set up a synchronization schedule, if necessary, to determine the date, time, and how often the synchronization occurs.

Once you complete the initial configuration process, you can map the fields in Blackbaud Sphere to the corresponding fields in The Raiser’s Edge. From the Connector Sync page in Blackbaud Sphere, you can determine which fields to synchronize, change the default mapping for certain fields, or specify custom mappings. After you add your mappings and determine which field categories to synchronize, you can return to the Sphere page in The Raiser’s Edge and manually synchronize the data. Or, if you created a synchronization schedule, the next time the Connector synchronizes data, any mapping or field group changes you made will appear.

When the synchronization process begins, the Sphere Connector creates and exports a batch file from The Raiser’s Edge. The Connector imports the batch file into Blackbaud Sphere. Based on your selections on the Connector Sync tabs, Sphere adds information to the appropriate fields to create new records or to update existing records. The Connector then creates and exports a batch file from Sphere, imports this file into The Raiser’s Edge, and creates transaction records based on the import file’s contents. After the synchronization completes, you can access these transactions from the Sphere page in The Raiser’s Edge and determine how to process each one. When you approve a transaction, The Raiser’s Edge creates a new record or updates the record you linked to the transaction.
Sphere Connector Installation

Blackbaud Sphere is Software as a Service (SaaS), which means you do not need to install Sphere on your workstation because Blackbaud hosts the application. However, you must install certain components that provide an interface between The Raiser’s Edge and Blackbaud Sphere so you can configure options, schedule synchronizations, and process transactions.

Activate the Connect API

Before you install the Sphere Connector components, you must log into Blackbaud Sphere and activate the Kintera Connect API. You perform this task only once. After you accept the terms and conditions stated for the Connect API, you can install the Sphere Connector Service and the Sphere Connector.

2. Click Client Login. The login page appears.
3. In the Client Login fields for Blackbaud Sphere, enter your login name and password.
4. Click Login to Sphere. The Blackbaud Sphere home page appears.
5. From the Control menu, select Administration.
7. Click Accept to activate the API.

Install the Sphere Connector Components

After you activate the Kintera Connect API, you install the Sphere Connector Plugin and the Sphere Connector Service on a server with access to The Raiser’s Edge. You can then install the Sphere Connector Plugin on each workstation that requires access to Blackbaud Sphere.

1. Download the Sphere Connector installation files to the server that hosts The Raiser’s Edge.
2. Browse to the re7sc.exe file.


![Welcome to the Sphere Connector Setup Wizard]

- This wizard will guide you through the installation of Sphere Connector.
- It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.
- Click Next to continue.

4. Click Next. The Choose Components screen appears.

![Choose Components]

- Choose which features of Sphere Connector you want to install.
- Check the components you want to install and uncheck the components you don't want to install. Click Install to start the installation.

Select components to install:
- Sphere Connector Plugin for Raiser's Edge
- Sphere Connector Service

Space required: 15.7MB

5. Select **Sphere Connector Plugin for Raiser's Edge** to install the plugin on the server.

6. Select **Sphere Connector Service** to install the Connector Service on the server. You must install the Connector Service to integrate Blackbaud Sphere with The Raiser's Edge.

**Warning:** You can install only one instance of the Sphere Connector Service. We recommend you install this component on a network server, if possible, because the computer that hosts the Connector Service should stay online at all times to prevent issues with scheduled synchronizations.
7. Click **Next**. The Specify Sphere Account ID screen appears.

8. Enter the Sphere account ID provided by your Blackbaud account manager. If you do not have this information, send an email to solutions@blackbaud.com or call 1-800-443-9441.

9. Click **Install**. When the Sphere Connector installation finishes, the Completing screen appears.

10. Select **Start Raiser’s Edge with Sphere Connector** to automatically start The Raiser’s Edge when you complete the installation.

11. Click **Finish**.
Install the Sphere Connector components on a workstation

After you install the Sphere Connector Plugin and Connector Service components on the Raiser’s Edge server, you can install the Connector Plugin on each workstation that connects to Blackbaud Sphere.

1. Download the Sphere Connector installation files to the workstation.

Note: To access these files, go to http://www.blackbaud.com/support/downloads/downloads.aspx. Follow the directions on the Downloads page to download the Sphere Connector installation files.

2. Browse to the re7sc.exe file.


4. Click Next. The Choose Components screen appears.
5. Select **Sphere Connector Plugin for Raiser’s Edge**. This option installs the plugin and adds a Sphere link to The Raiser’s Edge bar.

**Note**: You must install the Sphere Connector Plugin on each workstation where you need to access the Sphere page in The Raiser’s Edge.

6. Click **Install**. When the Sphere Connector installation finishes, the Completing screen appears.

![Completing the Sphere Connector Setup Wizard](image)

**Warning**: For Sphere Connector upgrades, a message appears if the Integration Service is currently running. You must stop all instances of the Integration Service before you can continue with the installation.

7. Select **Start Raiser’s Edge with Sphere Connector** to automatically start The Raiser’s Edge when you complete the installation.

8. Click **Finish**.

**Configure Blackbaud Sphere**

Before you synchronize, you must determine how to send information between The Raiser’s Edge and Blackbaud Sphere. You can choose to send data in two directions or only one direction. In bi-directional mode, the Sphere Connector submits new information entered in Sphere to The Raiser’s Edge and new information in The Raiser’s Edge to Blackbaud Sphere. In one-directional mode, the Connector sends new information in only one program to the other. You determine which program receives updates during the synchronization. For more information about synchronization modes, see the Sphere online Help.
Configure the Connector Sync

In this procedure, you will configure the Connector to import contact updates from The Raiser’s Edge to Blackbaud Sphere and export this information from Blackbaud Sphere to The Raiser’s Edge. After you complete the synchronization process in The Raiser’s Edge, you can return to the Connector Sync page in Blackbaud Sphere and activate additional synchronization categories.

1. From the Blackbaud Sphere home page, select Control, Administration.
2. Select Connector Sync. The Connector Sync page appears.

3. From Connector Sync Mode on the Admin tab, select the checkboxes in the Sphere -> Connector and Sphere <-> Connector columns for Contact Updates.

4. From Connector Sync Activations, select each entry under Contact Updates.

After you synchronize, you can access the imported contact update information from the Sign-up Requests and Profile Updates links on the Sphere page in The Raiser’s Edge.

**Note:** When you select checkboxes under Contact Updates, Gifts, or Events in Connector Sync Activations, you must also select a synchronization mode for the corresponding field group in Connector Sync Mode. Otherwise, the information will not synchronize.

5. Click Save.
6. From the menu bar, select File, Close to exit Blackbaud Sphere.
After you submit the fields in The Raiser’s Edge to Blackbaud Sphere in “Send mapping data to Blackbaud Sphere” on page 21, you can return to Blackbaud Sphere to map fields and synchronize additional field categories in Connector Sync Mode and Connector Sync Activations. For information about how to map fields, see “Map Fields” on page 26.

Configure The Raiser’s Edge

Before you import or process transactions from Blackbaud Sphere, you should select how to manage the information in The Raiser’s Edge. From the Sphere page, you can define settings for the various transaction types.

**Warning:** For security reasons, when a Raiser’s Edge user accesses transactions on the Sphere page, you cannot make changes to Options. If you attempt to open Options, a screen appears notifying you which users are in transactions. You cannot change options until all users exit transactions. In addition, if a user in The Raiser’s Edge is editing options, a second user can only access Options in read-only mode. When Options are read-only, the OK and Cancel buttons are not available.

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- “New Constituents” on page 14
- “Constituent Matching” on page 16
- “Address Saving” on page 17
- “Transaction Assignments” on page 19

Currency Configuration

To establish the countries and currencies to use with transactions from Sphere, select Currency Configuration.

- Establish options for the currency configuration
  1. From The Raiser’s Edge, click the Sphere link. The Sphere page appears.
  2. From the Sphere page, click Options. The Sphere Options screen appears.
3. On the Sphere Options screen, select **Currency Configuration**. The options for currencies appear.

![Currency Configuration screen]

4. For each **Currency**, select a corresponding **Country**.

   **Note**: The exchange rates for currencies are stored in **Configuration** in The Raiser’s Edge. For more information about exchange rates in **Configuration**, see the **Configuration & Security Guide** for The Raiser’s Edge.

5. Click **OK**. You return to the Sphere page in The Raiser’s Edge.

**Loading Limit**

To limit the number of transactions you process for each batch, select **Loading Limit**. During synchronization, the Sphere Connector imports all new or updated records in Blackbaud Sphere that meet your synchronization criteria. In some cases, this import process may include thousands of transactions. In The Raiser’s Edge, you determine how many of these transactions to process and include in a single batch.

For example, if you select the default load limit of 1,000 records, when you synchronize, only 1,000 transactions appear for each transaction category. Therefore, if you click **Sign-up Requests**, you can process no more than 1,000 transactions in the Sign-up Requests Transactions screen at one time.

**Warning**: It takes approximately one hour or less to process 1,000 transactions. If you select to load a large number of transactions, for example the maximum of 10,000 records, it will take much longer to process the transactions in **Batch**.
Establish a limit for the number of transactions to process

1. On the Sphere Options screen, select Load Limit. The setting to limit the number of imported transactions you process at one time appears.

2. To select the number of records to load, click a location on the bar. The number of transactions changes to reflect the location you select.

   Note: The number of transactions increases the farther to the right you click on the bar.

3. Click OK. You return to the Sphere page in The Raiser’s Edge.

New Constituents

To assign a constituent code to constituents imported from Blackbaud Sphere, select New Constituents. You can also create or select an existing default set of values for individuals and organizations. When you select a default set, the values you entered for the set automatically default into the fields on the record. For example, if most of your constituents are from the same city and state, you can create an “Address” default set with entries in the applicable address fields.
Establish options for new constituents

1. On the Sphere Options screen, select New Constituents. The options for constituents imported from Blackbaud Sphere appear.

2. In the Constituent Code applied for all new constituents field, select the Raiser’s Edge constituent code to apply to constituents added in Blackbaud Sphere.

   **Note:** When you commit the batch, the constituent code you selected appears on the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on this tab.

3. In the Default Set applied to all new individuals field, select a default set of values for new individual records.

   To create a new default set for individual records added in Sphere, click the Add New link. The New Default Set screen appears so you can select values for the individual record default set.

   **Note:** For information about Raiser’s Edge default sets, see the Program Basics Guide.

4. In the Default Set applied to all new organizations field, select a default set of values for new organization records.

   To create a new default set for new organization records from Sphere, click the Add New link. The New Default Set screen appears so you can select values for the organization record default set.

5. Click OK. You return to the Sphere page in The Raiser’s Edge.
Constituent Matching

The Constituent Matching option determines the automatic search used to match imported sign-up requests, donations, and event registrations. You can select to search by exact match or for records in The Raiser’s Edge that are marked inactive or deceased.

Establish options for constituent matching

1. On the Sphere Options screen, select Constituent Matching from the tree view on the left. On the right, the options for assigning Sphere page user rights appears.

2. Select the checkbox beside each field you want to search by. For example, to search by last name and nickname, select Last Name and Nickname.

3. To search by exact criteria, select Exact Match. For example, you want to search for William Adamson’s record. If you select this checkbox and search for “Will Adamson”, the program does not return his record because the search looks for an exact match for “William Adamson”. If you unmark the checkbox, the program initiates a “begins with” search which returns the record. We recommend you use this checkbox to narrow a large list of results.

4. To include inactive constituents in The Raiser’s Edge in your search, select Include Inactive.

5. To include deceased constituents in The Raiser’s Edge in your search, select Include Deceased.

6. Click OK. You return to the Sphere page in The Raiser’s Edge.
Address Saving

The **Address Saving** option determines how the Connector manages address information imported from Blackbaud Sphere. You can choose to replace the primary address of the matching constituent in The Raiser’s Edge with the imported address. Or, you can add the imported address as an alternate address on the constituent record.

- **Establish options for saving addresses**
  1. On the Sphere Options screen, select **Address Saving** from the tree view on the left.

![ADDRESS SAVING OPTIONS](image)

2. Determine how to manage address information.
   - To replace the primary address in The Raiser’s Edge with the address the donor entered in Blackbaud Sphere, select **Update constituent’s preferred address with the downloaded information**.
   - To add the address the donor entered in Blackbaud Sphere as an alternate address on the donor’s constituent record in The Raiser’s Edge, select **Add the downloaded information as a new address on constituent’s profile**.
   - Click **OK**. You return to the Sphere page in The Raiser’s Edge.
Advocacy

To assign a constituent code to advocates you import from Blackbaud Sphere, select **Advocacy**.

*Note:* Advocacy category is not available in *The Raiser’s Edge* for countries other than US.

- **Assign a constituent code to advocates**
  1. On the Sphere Options screen, select **Advocacy**. The options for advocates imported from Blackbaud Sphere appear.
  2. In the **Select a constituent code to be applied to all constituents who are added as advocates** field, select the Raiser’s Edge constituent code to apply to advocates added in Blackbaud Sphere.

*Note:* When you commit the batch, the constituent code you selected appears on the Bio 2 tab of the constituent record.

  3. Click **OK**. You return to the Sphere page in The Raiser’s Edge.
Transaction Assignments

To establish filters and security for new transactions as they default in the download grid, use **Transaction Assignments**. Assignments are established by selecting a security group in The Raiser’s Edge, a filter type, and criteria in a series of steps for a transaction type. You can select to enable or disable the assignments for the current downloads. In addition, use **Transaction Assignments** to manage transactions not assigned for processing. Only Raiser’s Edge users who meet the criteria you specify for a transaction type can process these transactions.

**Note:** You can apply **Transaction Assignments** to Sign-up Requests, Profile Updates, Donations, and Event Registrations.

- **Establish options for transaction assignments**
  1. On the Sphere Options screen, select **Transaction Assignments** from **Options**.
  2. In the **Transaction Type to manage** field, select the type of transaction for which you want to assign filters and security.
  3. To enable assignments for current downloads, select **Enable Assignments**.

**Note:** You must select **Enable Assignments** to enable the options on the Assignment Filters tab.

  4. On the Assignment Filters tab, in the **Security Group** field, select the security group in The Raiser’s Edge to associate with the transaction type. For example, you may select your revenue data entry group for Donations.
5. In the **Filter Type** field, select a filter to limit transactions. For example, select Donor Last Name Starts With.

6. In the **Criteria** box, select specific criteria to filter transactions. Your selection in the **Filter Type** field determines the criteria that appear. For example, if, in the **Filter Type** field, you select Donor Last Name Starts With, A through Z appears in the **Criteria** box.

   **Note:** To select multiple criteria in this box, press **SHIFT** or **CTRL** on your keyboard, then select the entries to include.

7. Click **Add**. The filter you created appears in the grid at the bottom.

   **Note:** To remove individual filters, click **Remove**. To remove all filters for the transaction type, click **Clear All Filters**.

8. To manage transactions that are not assigned, select the Transaction Properties tab.

   **Note:** Options on the Transaction Properties tab apply to the transaction type you selected in the **Transaction Type to manage** field.

9. In the **Unassigned Transactions** frame, select the security group in The Raiser’s Edge for which you want to apply unassigned transactions.

   An unassigned transaction refers to a transaction that is not considered for processing based on the filter and security criteria you select in from **Transaction Assignments**. For example, a gift from Robert Zier is downloaded to Donations. The **Transaction Assignments** filters for Donations uses Donor Last Name Starts With. However, the letter Z is not assigned to a security group for processing. Robert Zier’s gift is processed by the security group you select in this field.

10. Select the **Show unassigned transaction** tab checkbox if you want these transactions to appear on a separate tab.

11. Select the **Make transactions read-only** checkbox if you want the entries on the transaction tab to appear as read-only.

12. Click **OK**. You return to the Sphere page in The Raiser’s Edge.

### Register The Raiser’s Edge with Blackbaud Sphere

After you configure the transaction settings, you can register the Sphere Connector and send the fields in The Raiser’s Edge to Blackbaud Sphere. You will use these fields to map data in “Map Fields” on page 26.
Send mapping data to Blackbaud Sphere

The first time you access the Sphere Connector Scheduler in The Raiser’s Edge, you must complete a registration process. During this process, The Raiser’s Edge sends database fields to Sphere. You can then map these fields from the Connector Sync page in Blackbaud Sphere.

**Note:** To make sure you have the most current mapping data available on the Connector Sync page, follow these steps each time you create a new campaign, fund, appeal, attribute, package, or event in The Raiser’s Edge.

1. On the Sphere page in The Raiser’s Edge, click **Scheduler**. The Configuration screen appears.

   ![Scheduler Configuration Screen]

   **Specify Sphere credentials and options:**
   - **User**: Your dedicated Sphere Connector login.
   - **Password**: Password corresponding to your login.
   - **Send mapping metadata**: Select if you want to send mapping metadata.
   - **Updates only**: Select if you want to send updates only.
   - **Send all**: Select if you want to send all metadata.
   - **Set initial sync date to**: Enter the date you want to synchronize data to. For example, if you launched an event or form in Blackbaud Sphere before you installed the Sphere Connector, you can enter the date you made the information public. If the number of records affected exceeds the number the Sphere Connector can process during a synchronization, we recommend that you update the information in your database. For information about synchronization, see “Scheduling Considerations” on page 3.

2. Enter the dedicated Sphere Connector login you created. For more information about this login, see “Other Considerations” on page 4.

3. Select whether to send mapping metadata. If you select this option, select whether to send updates or all metadata.

4. Select an initial synchronization date. The Connector will synchronize data between the date you entered and the current date.

   **Note:** You can enter a date prior to today’s date in the **Set initial sync date to** field. For example, if you launched an event or form in Blackbaud Sphere before you installed the Sphere Connector, you can enter the date you made the information public. If the number of records affected exceeds the number the Sphere Connector can process during a synchronization, we recommend that you update the information in your database. For information about synchronization, see “Scheduling Considerations” on page 3.

5. Click **Next** to submit The Raiser’s Edge mapping data to Blackbaud Sphere. Mapping status information appears on the Configuration screen. When the mapping completes, a notification message appears on this screen.
6. Click **Next**. The server screen appears.

7. Enter the name of the server or workstation where you installed the Sphere Connector Service.

8. Click **Finish**. The Integration Control Panel screen appears.

For information about how to manually synchronize data or schedule a synchronization, see “Synchronize Data” on page 24.
Send updated mapping data to Blackbaud Sphere

Over time, you may add new campaigns, funds, appeals, attributes, packages, or events to The Raiser’s Edge that you must map to records and fields in Blackbaud Sphere. Each time you add a new mapping item, you can send the details, or mapping metadata, to Blackbaud Sphere. You can then follow the steps in “Map Fields” on page 26 section to complete the process.

1. On the Sphere page in The Raiser’s Edge, click **Scheduler**. The Integration Control Panel screen appears.

![Integration Control Panel](image)

2. Select **Configuration, Sphere connection**. The Configuration screen appears.

![Configuration Screen](image)

3. Select **Send mapping metadata**.
4. To synchronize data from a range between the existing initial date and a new date, enter a new date and click **Reset**. A warning appears.

This causes the next synchronization to occur for the dates between the initial sync date and the new date you entered. For example, the initial sync date was 1/4/2010 and you change the date to 11/4/2009. Then you click Reset followed by Finish. The next synchronization will be for the date range of 11/4/2009-1/4/2010.

5. Click **Finish** to submit The Raiser’s Edge mapping data to Blackbaud Sphere. Mapping status information appears on the Configuration screen. When the mapping completes, a notification message appears on this screen.

6. Click **Finish**. You return to the Integration Control Panel screen.

For information about how to manually synchronize data or schedule a synchronization, see “Synchronize Data” on page 24.

**Synchronize Data**

You use the Sphere Scheduler to synchronize information between Blackbaud Sphere and The Raiser’s Edge. In “Configure the Connector Sync” on page 11, you activated the **Contact Updates** field group in **Connector Sync Activation**. The first time you synchronize, the Connector updates only the standard contact update information. At any time after you submit the mapping data from The Raiser’s Edge to Blackbaud Sphere, you can map all database fields and activate additional field categories to synchronize from the Connector Sync page in Blackbaud Sphere. For more information about synchronization options in Sphere, see “Configure the Connector Sync” on page 11.

**Warning:** The Sphere Connector can synchronize a maximum of 5,000 records in Blackbaud Sphere and 10,000 records in The Raiser’s Edge during a single session. If you experience issues during the synchronization process, contact Blackbaud Sphere Support.
From the Integration Control Panel screen in The Raiser’s Edge, you can manually start the synchronization process or create an automatic synchronization schedule. When you create a synchronization schedule and select **Enabled**, the Sphere Connector immediately synchronizes the data. After this first synchronization, the Connector follows the schedule you defined. You must have local administrator privileges to synchronize information with the Sphere Scheduler.

To access the Integration Control Panel screen, on the Sphere page in The Raiser’s Edge click **Scheduler**.

**Warning:** Before you synchronize data, verify that the workstation or server on which you installed The Raiser’s Edge has the current time. The Sphere Connector uses strict time-matching criteria for the synchronization process.

### Manually Synchronize Information

You can synchronize information between Sphere and The Raiser’s Edge at any time if you do not want to create a schedule. On the Integration Control Panel screen, click **Initiate Sync Now** to start an immediate, one-time process. The synchronization events appear on the Current tab so you can view the progress. You must have local administrator privileges to synchronize on demand.

**Note:** If you merge or delete a supporter record in Sphere that was previously synchronized, you must manually change or delete the corresponding record in The Raiser’s Edge.

### Create a Synchronization Schedule

You can specify a schedule for Sphere and The Raiser’s Edge to synchronize information.
Establish a synchronization schedule

You must have Windows administrator privileges to create a synchronization schedule.

1. From the Sphere page in The Raiser’s Edge, click **Scheduler**. The Integration Control panel screen appears.

2. On the Integration Control Panel screen, enter a start date and time in the **Begin** field.

3. Enter how often the synchronization occurs in the **Repeat every** fields.

4. Select **Enabled** to apply the schedule. The current date and time appear on the Current tab to indicate this is the time you enabled the schedule.

5. From the Integration Control Panel File menu, select **Exit**. You return to the Sphere page.

Map Fields

From the Connector Sync page in Blackbaud Sphere, you can select to synchronize fields Blackbaud Sphere and The Raiser’s Edge have in common, such as address and gift information. You can also create field mappings to link non-standard fields or create a relationship between common fields that have more than one logical mapping. When the Sphere Connector synchronizes data, the fields you map determine the information that appears on records in The Raiser’s Edge and Blackbaud Sphere.

**Note:** You do not have to map constituent codes. During the synchronization process, Blackbaud Sphere automatically creates matching constituencies for new constituent codes imported from The Raiser’s Edge. For new constituents imported from Blackbaud Sphere, you can assign a default constituent code from the Sphere Options screen in The Raiser’s Edge. For more information about how to select a default constituent code, see “New Constituents” on page 14.
For certain common fields, there may be more than one logical match. For example, the **Cell Phone** field in Blackbaud Sphere maps to the **Cell Phone** field in The Raiser’s Edge by default. However, you may prefer to copy **Cell Phone** field entries to the **Business** field on the constituent record in The Raiser’s Edge. You can change the **Cell Phone** field mapping from the Phone/E-Mail tab on the Mapping tab. Only common fields that can be remapped and attributes appear on the Mapping tabs. For more information about field mapping, see “Non-standard Field Mapping” on page 39.

- **Map Blackbaud Sphere and The Raiser’s Edge fields**

  The next manual or scheduled synchronization includes any mapping changes or field group activation updates you make. For information about how to send new mapping data in The Raiser’s Edge to Blackbaud Sphere, see “Send updated mapping data to Blackbaud Sphere” on page 23.

  1. From the Sphere page in The Raiser’s Edge, click **Sphere**. The Connector Sync page appears.
  2. Select the Mapping tab.
  3. Map the **Sphere** fields with the appropriate fields in The Raiser’s Edge.
     - “Phone\E-Mail” on page 29
     - “Addresses” on page 30
     - “Custom Contact Data” on page 31
     - “Thon Summary Data” on page 32
     - “Gifts” on page 32
     - “Funds” on page 36
     - “Campaigns” on page 36
     - “Appeals” on page 36
     - “Source Codes” on page 37
     - “Memorial and Tribute Gift Information” on page 35
     - “Event Registrations” on page 37
     - “Contact Lists” on page 78
4. Select the Admin tab.

5. From **Connector Sync Mode** on the Admin tab, select how to synchronize information.

   To synchronize the information in both The Raiser’s Edge and Blackbaud Sphere, select the corresponding checkbox in both columns. To send information from Blackbaud Sphere to The Raiser’s Edge only, select the checkbox in the Sphere -> Connector column. To send information from The Raiser’s Edge to Blackbaud Sphere only, select the checkbox in the Sphere <- Connector column.

   **Note:** For the **Events** and **Advocacy** field groups, you can send information from Sphere to The Raiser’s Edge only. For the **Contact Lists** field group, you can send information in The Raiser’s Edge to Blackbaud Sphere only.

   **Note:** For the **Events** field group, you can send information from Sphere to The Raiser’s Edge only. For the **Contact Lists** field group, you can send information in The Raiser’s Edge to Blackbaud Sphere only.
6. From **Connector Sync Activations** on the Admin tab, select each field group item you want to synchronize. These items correspond to the field groups in **Connector Sync Mode**. For more information about field groups, see the Sphere online Help.

**Warning:** If you clear a checkbox in **Connector Sync Activations**, the Sphere Connector does not synchronize the items in that field group.

7. Click **Save**. During the next scheduled synchronization, the Connector synchronizes the mapped fields in each field group you selected.

For information about how to schedule or manually synchronize Blackbaud Sphere and The Raiser’s Edge, see “Synchronize Data” on page 24.

### Contact Updates

The Contact Updates field group includes standard profile fields and contact information. Although Blackbaud Sphere and The Raiser’s Edge automatically map certain items in this field group, you can create new mappings on the Phone/E-Mail, Addresses, and Custom Profile Fields tabs on the Mapping tab in Blackbaud Sphere.

### Record Identifier Fields

This table shows the identifiers the Sphere Connector uses to match supporter records in Sphere to constituent records in The Raiser’s Edge. During synchronization, The Raiser’s Edge imports the Supporter ID for each supporter record and exports the Constituent Import ID field to Blackbaud Sphere.

For more information about record identifiers, see the Sphere online Help.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supporter ID</td>
<td>Sphere Constituent Identifier</td>
</tr>
<tr>
<td>Alternate ID</td>
<td>Constituent Import ID</td>
</tr>
<tr>
<td>RE System Identifier</td>
<td>Constituent ID and Internal System Record ID</td>
</tr>
</tbody>
</table>

### Phone/E-Mail

When you select the **Phone / E-mail** checkbox on the Admin tab in Blackbaud Sphere, the Sphere Connector synchronizes Sphere supporter contact fields with contact fields on the constituent record in The Raiser’s Edge. To access this information in The Raiser’s Edge, open a constituent record and select the Bio 1 tab. Contact details appear in the **Phone/Email/Links** grid.

**Note:** From the Connector Sync page in Blackbaud Sphere, you can customize the field mapping for phone numbers and email addresses from the Phone/E-Mail tab on the Mapping tab.

This table shows the mapping for Blackbaud Sphere phone and email fields sent to an individual’s constituent record in The Raiser’s Edge.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Type: Home</td>
</tr>
<tr>
<td>Business</td>
<td>Type: Business</td>
</tr>
</tbody>
</table>
This table shows the mapping for Blackbaud Sphere phone fields sent to an organization’s constituent record in The Raiser’s Edge.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>Type: Fax</td>
</tr>
<tr>
<td>Cell Phone</td>
<td>Type: Cell Phone</td>
</tr>
<tr>
<td>Pager</td>
<td>Type: Beeper</td>
</tr>
<tr>
<td>Alternate Phone</td>
<td>Type: Phone</td>
</tr>
<tr>
<td>Email</td>
<td>Type: Email</td>
</tr>
<tr>
<td>Email 2</td>
<td>Type: Email</td>
</tr>
</tbody>
</table>

Note: The Raiser’s Edge does not import email addresses for organizations in Blackbaud Sphere.

Addresses

When you select the Addresses checkbox on the Admin tab in Blackbaud Sphere, the Sphere Connector synchronizes a supporter’s primary address fields in Sphere with the preferred address fields on the constituent record in The Raiser’s Edge. To view a constituent’s addresses in The Raiser’s Edge, open a constituent record and select the Addresses tab.

Note: From the Connector Sync page in Blackbaud Sphere, you can create custom mappings for certain address fields from the Addresses tab on the Mapping tab.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1 and Line 2</td>
<td>Address lines</td>
</tr>
<tr>
<td>City</td>
<td>City (for US, UK, CAN)</td>
</tr>
<tr>
<td></td>
<td>Suburb (for AUS)</td>
</tr>
<tr>
<td>Country</td>
<td>Country</td>
</tr>
<tr>
<td>County</td>
<td>County</td>
</tr>
<tr>
<td>Primary Address</td>
<td>Set this address to the preferred address checkbox</td>
</tr>
<tr>
<td>Mail to this Address</td>
<td>Send mail to this address checkbox</td>
</tr>
<tr>
<td>State</td>
<td>State</td>
</tr>
<tr>
<td>ZIP Code</td>
<td>ZIP (for US)</td>
</tr>
<tr>
<td></td>
<td>Postal Code (for CAN)</td>
</tr>
<tr>
<td></td>
<td>Postcode (for UK and AUS)</td>
</tr>
<tr>
<td></td>
<td>Post code (for NZ)</td>
</tr>
</tbody>
</table>
Custom Profile Fields

When you select the **Custom Profile Fields** checkbox on the Admin tab in Blackbaud Sphere, the Sphere Connector synchronizes Sphere supporter details with corresponding fields on the constituent record tabs in The Raiser’s Edge.

*Note:* You can create custom mappings for certain constituent fields from the Custom Profile Fields tab on the Mapping tab.

This table shows the mapping for Blackbaud Sphere profile fields sent to an individual's constituent record in The Raiser’s Edge.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Bio 1 tab: Last name</td>
</tr>
<tr>
<td>First Name</td>
<td>Bio 1 tab: First name</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>Bio 1 tab: Middle name</td>
</tr>
<tr>
<td>Title</td>
<td>Bio 1 tab: Titles</td>
</tr>
<tr>
<td>Suffix</td>
<td>Bio 1 tab: Suffixes</td>
</tr>
<tr>
<td>Suffix 1</td>
<td>Bio 1 tab: Suffixes</td>
</tr>
<tr>
<td>Nickname</td>
<td>Bio 1 tab: Nickname</td>
</tr>
<tr>
<td>Maiden Name</td>
<td>Bio 1 tab: Maiden name</td>
</tr>
<tr>
<td>Gender</td>
<td>Bio 1 tab: Gender</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Bio 1 tab: Birth date</td>
</tr>
<tr>
<td>Deceased</td>
<td>Bio 1 tab: Deceased</td>
</tr>
<tr>
<td>Marital Status</td>
<td>Bio 1 tab: Marital status</td>
</tr>
<tr>
<td>Active</td>
<td>Bio 1 tab: Is inactive</td>
</tr>
<tr>
<td>Do Not E-mail</td>
<td>Bio 1 tab: Requests no email</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Bio 2 tab: Ethnicity</td>
</tr>
<tr>
<td>Religion</td>
<td>Bio 2 tab: Religion</td>
</tr>
<tr>
<td>Greeting 1</td>
<td>Addressee/Salutations tab: Primary salutation</td>
</tr>
<tr>
<td>Greeting 2</td>
<td>Addressee/Salutations tab: Primary addressee</td>
</tr>
</tbody>
</table>

This table shows the mapping for Blackbaud Sphere profile fields sent to an organization's constituent record in The Raiser’s Edge.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>Bio 1 tab: Org Name</td>
</tr>
<tr>
<td>Active</td>
<td>Bio 1 tab: Is inactive</td>
</tr>
<tr>
<td>Do Not E-mail</td>
<td>Bio 1 tab: Requests no email</td>
</tr>
</tbody>
</table>
Thon Summary Data

This table shows the field mapping that occurs during synchronization when you select the Thon Summary checkbox on the Admin tab in Blackbaud Sphere. Thon summary information is sent from Blackbaud Sphere to The Raiser’s Edge only. The Sphere Connector adds the information to the Category column on the Attributes tab of the corresponding constituent record. The Thon name and creation date appear in the Comments column.

When a team member’s summary information changes, Blackbaud Sphere updates the following fields for all members of the team: Team Name, Team Fundraising Goal, Amount Raised by Team, Team Member Goal, and Number of Team Members.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount Raised to Date</td>
<td>Sphere Thon Raised</td>
</tr>
<tr>
<td>Team Name</td>
<td>Sphere Thon Team Name</td>
</tr>
<tr>
<td>Team Fundraising Goal</td>
<td>Sphere Thon Team Goal</td>
</tr>
<tr>
<td>Amount Raised by Team</td>
<td>Sphere Thon Team Raised</td>
</tr>
<tr>
<td>Team Member Goal</td>
<td>Sphere Thon Member Goal</td>
</tr>
<tr>
<td>Number of Team Members</td>
<td>Sphere Thon Number of Members</td>
</tr>
<tr>
<td>Team Captain</td>
<td>Sphere Thon is Team Captain</td>
</tr>
<tr>
<td># of Emails</td>
<td>Sphere Thon Number of Emails</td>
</tr>
<tr>
<td>Last Login</td>
<td>Sphere Thon Last Login</td>
</tr>
<tr>
<td>Number of Tweets</td>
<td>Sphere Thon Number of Tweets</td>
</tr>
<tr>
<td>Number of Facebook Updates</td>
<td>Sphere Thon Number of Facebook Updates</td>
</tr>
</tbody>
</table>

Gifts

The following tables show the standard field mapping for the Gifts checkboxes under Connector Sync Activation on the Admin tab. For information about how the Sphere Connector synchronizes gift information, see the Gift Fields section of the Sphere online Help.

Standard Gift Information

The Sphere Connector synchronizes the following gift fields in Sphere with the corresponding gift record fields in The Raiser’s Edge.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund/Designation</td>
<td>Fund</td>
</tr>
<tr>
<td>Amount Received</td>
<td>Amount</td>
</tr>
<tr>
<td>Received Date</td>
<td>Gift date</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Pay method</td>
</tr>
</tbody>
</table>
The Connector links gifts you download from Blackbaud Sphere to the default campaign for the corresponding fund in The Raiser’s Edge. You can select a different fund for the gift from the Donations Transactions screen in The Raiser’s Edge. For more information, see “Donations” on page 52. For gift information you send to Blackbaud Sphere from The Raiser’s Edge, Sphere uses the campaign mapping you defined from the Connector Sync page to determine which Sphere campaign receives credit for the gift. For information about the Campaigns tab on the Connector Sync page, see the Sphere online Help.

This table shows gift details sent only from Blackbaud Sphere to The Raiser’s Edge gift record.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Type: Cash</td>
<td>Pay method: Cash</td>
</tr>
<tr>
<td>Payment Type: Check (Individual Supporter)</td>
<td>Pay method: Personal Check check no./date</td>
</tr>
<tr>
<td>Payment Type: Check (Organizational Supporter)</td>
<td>Pay method: Business Check check no./date</td>
</tr>
<tr>
<td>Payment Type: Direct Debit</td>
<td>Pay method: Other Ref no./date: Direct Debit</td>
</tr>
<tr>
<td>Payment Type: Direct Debit</td>
<td>Pay method: Direct Debit **Delete row above (Pay method: Other) for 9.3.8 release - double-check w/ Kim</td>
</tr>
<tr>
<td>Payment Type: ACH</td>
<td>Pay method: Other Ref no./date: ACH</td>
</tr>
<tr>
<td>Payment Type: Charge (offline)</td>
<td>Pay method: Credit Card</td>
</tr>
<tr>
<td>Payment Type: Credit Card Type</td>
<td>Pay method: Credit Card Card type</td>
</tr>
<tr>
<td>Payment Type: PayPal</td>
<td>Pay method: Other Ref no./date: PayPal</td>
</tr>
<tr>
<td>Receipt #</td>
<td>Attributes tab: Category: SphereReceiptNumber</td>
</tr>
</tbody>
</table>

**Note:** For automated clearing house (ACH), direct debit, and PayPal payments entered in Blackbaud Sphere, a payment type of “Other” appears in the corresponding **Pay method** field in The Raiser’s Edge, and the payment type appears in the **Ref. no./date** field.

Recurring Gift Information

For a recurring gift entered in Blackbaud Sphere, once you synchronize and process the transaction in the Sphere Connector, “Recurring Gift” appears in the **Gift type** field on the gift record in The Raiser’s Edge. The program creates one record for the recurring gift commitment and a separate record for each recurring gift payment received. For payments, “Recurring Gift Pay-Cash” appears in the **Gift type** field. When you open a recurring gift record in The Raiser’s Edge, you can select the Transactions tab to view the payments received for the commitment, as well as the date and amount of the next recurring gift transaction.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Type [Recurring gift]</td>
<td>gift record: Gift tab: Gift type</td>
</tr>
<tr>
<td>Gift Type [Recurring gift payment]</td>
<td>gift record: Gift tab: Gift type</td>
</tr>
</tbody>
</table>
Split Gift Information

If the gift amount in Blackbaud Sphere is split between two or more designations, when you download the gift to The Raiser’s Edge, the distribution information appears on the Split Gift tab of the gift record. This table shows the mapping for split gift information entered on the Split Gift tab of a gift record in Blackbaud Sphere.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installment Amount</td>
<td>gift record: Gift tab: Schedule button: Transaction Schedule screen: Transaction Amount</td>
</tr>
<tr>
<td>Number of Installments</td>
<td>gift record: Gift tab: Schedule button: [used in conjunction with Installment Amount to calculate the transaction schedule and Ending on date]</td>
</tr>
<tr>
<td>Frequency of Installments</td>
<td>gift record: Gift tab: Schedule button: Transaction Schedule screen: Frequency</td>
</tr>
<tr>
<td>Start Date</td>
<td>gift record: Gift tab: Schedule button: Transaction Schedule screen: Starting on</td>
</tr>
</tbody>
</table>

**Note:** We recommend that you synchronize and process gifts at least once a week. You cannot process multiple payments for a recurring gift in a single synchronization batch. Therefore, if you process gift information weekly, you avoid losing any gift payment information when you download gifts from Blackbaud Sphere to The Raiser’s Edge.

Thon Dedication Information

This table shows the mapping for dedication fields on Thon gifts entered in Blackbaud Sphere. This information can be sent from Blackbaud Sphere to The Raiser’s Edge only.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognition From</td>
<td>constituent record: Bio 1 tab: Last name, First name</td>
</tr>
<tr>
<td>Recognition Type</td>
<td>gift record: Tribute tab: Tribute Type</td>
</tr>
</tbody>
</table>
Memorial and Tribute Gift Information

The Connector imports honoree and supporter information for memorial or tribute gifts from Blackbaud Sphere to The Raiser’s Edge only. The Raiser’s Edge uses supporter information to match these individuals with existing constituents.

**Note:** You must have the optional mode *Tribute* for The Raiser’s Edge to view and manage memorial and tribute information. For information about how to access this module, contact your Blackbaud account manager.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognition To</td>
<td>gift record: Tribute tab: Honor/Memorial</td>
</tr>
<tr>
<td>Honoree</td>
<td>gift record: Tribute tab: Honor/Memorial</td>
</tr>
<tr>
<td>Honoree Type</td>
<td>gift record: Tribute tab: Tribute Type</td>
</tr>
<tr>
<td>Supporter First Name, Last Name</td>
<td>gift record: Gift tab: Constituent</td>
</tr>
<tr>
<td>Supporter Phone</td>
<td>constituent record: Bio 1 tab: Phone/Email/Links</td>
</tr>
<tr>
<td>Supporter Email</td>
<td>constituent record: Bio 1 tab: Phone/Email/Links</td>
</tr>
<tr>
<td>Supporter Address Line 1</td>
<td>constituent record: Bio 1 tab: Preferred Address: Address lines</td>
</tr>
<tr>
<td>Supporter City</td>
<td>constituent record: Bio 1 tab: Preferred Address: City</td>
</tr>
<tr>
<td>Supporter State</td>
<td>constituent record: Bio 1 tab: Preferred Address: State</td>
</tr>
<tr>
<td>Supporter Zip</td>
<td>constituent record: Bio 1 tab: Preferred Address: ZIP</td>
</tr>
</tbody>
</table>

When you create custom fields in Blackbaud Sphere for users to enter tribute and memorial information on Single or Multi-Step Donation forms or Custom Friends Asking Friends web sites, you must map each custom field to the corresponding memorial or tribute field in The Raiser’s Edge. From the Memorial/ Tribute tab on the Mapping tab in Blackbaud Sphere, map the Sphere custom profile or custom event fields to the appropriate memorial or tribute field. For more information about custom fields in Blackbaud Sphere, see the Sphere online Help.

**Gifts with Acknowledgee Information**

The Connector imports acknowledgee information for memorial or tribute gifts from Blackbaud Sphere to The Raiser’s Edge only. The Raiser’s Edge uses acknowledgee information to match Sphere supporters with existing constituents.

If the acknowledgee selected in Blackbaud Sphere is “Other,” Sphere sends the supporter’s name to The Raiser’s Edge, if the name is available. The Connector will attempt to match this supporter with an existing constituent. If there is not a match, the program creates a new constituent record. If the acknowledgee selected in Blackbaud Sphere is “Self,” “Anonymous,” or blank, this information is not sent to The Raiser’s Edge.

**Note:** You must have the optional mode *Tribute* for The Raiser’s Edge to view and manage memorial and tribute information. For information about how to access this module, contact your Blackbaud account manager.
From the Funds tab on the Mapping tab in Blackbaud Sphere, you can map each fund in The Raiser’s Edge to a corresponding fund in Blackbaud Sphere. The standard gift mapping tables in “Gifts” on page 32 explain how the Connector synchronizes gift information related to funds. For information about how to create funds in The Raiser’s Edge, see the Campaigns, Funds, and Appeals Data Entry Guide. For information about how to create funds in Blackbaud Sphere, see the Sphere online Help.

<table>
<thead>
<tr>
<th><strong>Sphere Field</strong></th>
<th><strong>Raiser’s Edge Field</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Honoree First Name, Last Name</td>
<td>gift record: Tribute tab: tribute record: Honor/Memorial</td>
</tr>
<tr>
<td>Tribute Type</td>
<td>gift record: Tribute tab: tribute record: Tribute Type</td>
</tr>
<tr>
<td>Acknowledgee First Name, Last Name</td>
<td>gift record: Tribute tab: tribute record: Name</td>
</tr>
<tr>
<td>Acknowledgee Phone</td>
<td>acknowledgee’s constituent record: Phone/Email/Links</td>
</tr>
<tr>
<td>Acknowledgee Email</td>
<td>acknowledgee’s constituent record: Phone/Email/Links</td>
</tr>
<tr>
<td>Acknowledgee Address Line 1</td>
<td>acknowledgee’s constituent record: Street Address</td>
</tr>
<tr>
<td>Acknowledgee City</td>
<td>acknowledgee’s constituent record: City</td>
</tr>
<tr>
<td>Acknowledgee State</td>
<td>acknowledgee’s constituent record: State</td>
</tr>
<tr>
<td>Acknowledgee Zip</td>
<td>acknowledgee’s constituent record: Zip</td>
</tr>
</tbody>
</table>

**Funds**

**Campaigns**

From the Campaigns tab on the Mapping tab in Blackbaud Sphere, you can map each campaign in The Raiser’s Edge to a corresponding campaign in Blackbaud Sphere. The standard gift mapping tables in “Gifts” on page 32 explain how the Connector synchronizes gift information related to campaigns. For information about how to create campaigns in The Raiser’s Edge, see the Campaigns, Funds, and Appeals Data Entry Guide. For information about how to create campaigns in Blackbaud Sphere, see the Sphere online Help.

*Note:* To download a gift transaction from Blackbaud Sphere to The Raiser’s Edge, the Blackbaud Sphere campaign associated with the gift must be linked to a campaign in The Raiser’s Edge that has a default fund assigned.

**Appeals**

From the Appeals tab on the Mapping tab in Blackbaud Sphere, you can map each appeal in The Raiser’s Edge to an appeal you created in Campaign Manager in Blackbaud Sphere. The standard gift mapping tables in “Gifts” on page 32 explain how the Connector synchronizes gift information related to appeals. For information about how to create appeals in The Raiser’s Edge, see the Campaigns, Funds, and Appeals Data Entry Guide. For information about how to create appeals in Blackbaud Sphere, see the Sphere online Help.
**Sphere Appeals** on the Appeals tab displays Sphere appeal names and the source codes linked to these appeals. When you link an appeal in **RE Appeals** to a source code on the Appeals tab, the source code is no longer available for mapping on the Source Codes tab. You cannot link both an appeal and a package in The Raiser’s Edge to the same source code in Blackbaud Sphere.

### Source Codes

Source codes you create in the Code Library in Blackbaud Sphere correspond to packages in The Raiser’s Edge. A package is a means to further define an appeal. For example, you may have an appeal that includes two email packages. One package contains a message for donors who contributed more $50 during the past year, while the other package targets donors who contributed less than $50. You can link each package to a corresponding source code in Blackbaud Sphere so that you can use Sphere’s online marketing capabilities to manage and distribute the packages. In The Raiser’s Edge, you can use the source code information you import from Blackbaud Sphere to track and analyze the effectiveness of each package. For more information about appeal packages in The Raiser’s Edge, see the *Campaigns, Funds, and Appeals Data Entry Guide*. For more information about source codes in Blackbaud Sphere, see the Sphere online Help.

From the **Mapped Appeals** field on the Source Codes tab, select an appeal to view the sources codes defined for the appeal. You can then link your appeal packages to the appropriate source code in Blackbaud Sphere.

**Note:** You cannot map both an appeal and a package in The Raiser’s Edge to the same source code in Blackbaud Sphere. When you map a package in **RE Packages** to a source code in **Sphere Source Codes** on the Source Codes tab, the source code is no longer available for mapping on the Appeals tab.

### Event Registrations

When you choose to synchronize events in **Connector Sync Mode** on the Admin tab in Blackbaud Sphere and select the **Registration Types** checkbox under **Connector Sync Activations**, the Sphere Connector imports event registration information from Blackbaud Sphere to event records in The Raiser’s Edge. For information about mapping event registration fields, see the Sphere online Help.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Name</td>
<td>General tab: Name</td>
</tr>
<tr>
<td>Registration Type</td>
<td>Participants tab: participant record: Registration Fees tab: Unit</td>
</tr>
<tr>
<td>Registration Fee</td>
<td>Participants tab: participant record: Registration Fees tab: Gift Amount</td>
</tr>
<tr>
<td>Registration Quantity</td>
<td>Participants tab: participant record: Registration Fees tab: No. Units</td>
</tr>
</tbody>
</table>

If the unit or gift amount information in The Raiser’s Edge does not match the registration type and fee information in Blackbaud Sphere, you can map the correct event fields on the Registration Types tab on the Mapping tab. You must first map the events on the Events tab. Then, from the Registration Types tab, select the mapped events for which you want to define the correct registration mapping from the **Mapped Events** field. From **RE Event Prices** and **Sphere Registration Types** map the correct event registration information.
If you select to synchronize events, but do not select **Contact Updates** under **Connector Sync Mode** on the Admin tab, the Sphere Connector synchronizes contact information only if a payment or registration record has been created.

**Note:** You must have the optional module *Event Management* to view and manage event information in The Raiser’s Edge. For information about how to access this module, contact your Blackbaud account manager.

**Note:** The amount in the **Registration Fee** field in Blackbaud Sphere must be greater than or equal to the amount of the **Gift Amount** field you map to in The Raiser’s Edge. If the registration fee is less than the gift amount, an error message appears.

## Advocacy

When a supporter takes action online by sending an action message or signing a petition, you can export the action item and supporter advocacy information from Blackbaud Sphere to The Raiser’s Edge. However, you can export advocacy message information only after Sphere completes all delivery attempts.

Once you download an advocacy actions to The Raiser’s Edge, you can view each action item’s details, including the message recipients, from the Actions tab of the constituent record. Each action appears as a separate row in the actions grid. For example, if a constituent takes action using a Sphere Action Center and three people receive the message, three actions appear on the Actions tab.

<table>
<thead>
<tr>
<th>Sphere Field</th>
<th>Raiser’s Edge Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action type</td>
<td>Actions tab: action record: General tab: Action type</td>
</tr>
<tr>
<td>Date created</td>
<td>Actions tab: action record: General tab: Action date, Start time, and End time</td>
</tr>
<tr>
<td>Delivery method</td>
<td>Actions tab: action record: General tab: Delivery method</td>
</tr>
<tr>
<td>Target</td>
<td>Actions tab: action record: General tab: Recipient name</td>
</tr>
<tr>
<td>Action/Message ID</td>
<td>Actions tab: action record: General tab: Message ID</td>
</tr>
<tr>
<td>Action item name</td>
<td>Actions tab: action record: General tab: Alert title</td>
</tr>
<tr>
<td>Action topic classification</td>
<td>Actions tab: action record: General tab: Issue</td>
</tr>
<tr>
<td>District</td>
<td>Actions tab: action record: Attributes tab: District</td>
</tr>
<tr>
<td>Most recent</td>
<td>Actions tab: action record: Attributes tab: Last action taken</td>
</tr>
<tr>
<td>Total</td>
<td>Actions tab: action record: Attributes tab: # of total actions taken (lifetime)</td>
</tr>
<tr>
<td>Number of action items</td>
<td>Actions tab: action record: Attributes tab: # of action items forwarded</td>
</tr>
<tr>
<td>forwarded</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Sphere calculates the number of action items the supporter forwarded when the action item appears as a trackable link in a bulk e-mail message.

**Note:** Advocacy category is not available in *The Raiser’s Edge* for countries other than US.
Non-standard Field Mapping

From the Mapping tab on the Connector Sync page in Blackbaud Sphere, you can map non-standard fields. Non-standard fields are fields that do not have an exact match or have more than one logical match. For example, The Raiser’s Edge may contain a custom attribute that does not exist in Blackbaud Sphere. To transfer information to this field, you add or select a corresponding field in Sphere and create the mapping. For constituent attribute and gift information, you can configure Blackbaud Sphere to create matching fields automatically for custom fields imported from The Raiser’s Edge.

For certain fields, there may be more than one potential match. The Sphere Connector provides default mapping for these fields, but you can remap the information to meet your needs. For example, the Alternate Phone field in Blackbaud Sphere maps to the Seasonal Phone field in The Raiser’s Edge by default. However, you may prefer to copy Alternate Phone field entries to the Business field on the constituent record in The Raiser’s Edge. You can change the Alternate Phone field mapping from the Phone/E-Mail tab on the Mapping tab.

When you register The Raiser’s Edge with Blackbaud Sphere, you submit fields in The Raiser’s Edge for mapping. These fields appear in RE Fields for each tab available from the Mapping tab. For more information about non-standard field mapping in Blackbaud Sphere, see the Sphere online Help.

*Note:* We recommend you map all required fields in The Raiser’s Edge to corresponding fields in Blackbaud Sphere. For information about required fields in The Raiser’s Edge, see the *Configuration and Security Guide.*

Sphere Transactions Overview

After you initiate a synchronization and the Sphere Connector imports transactions from Blackbaud Sphere, you can process the records using the links on the Sphere page. To access the page in The Raiser’s Edge, click **Sphere**.

From the View field on the Sphere page, you can select to view All Transaction Categories, Unaccepted Transactions Only, or Unaccepted Transactions with Counts. If you select Unaccepted Transactions with Counts, when you click Refresh, a status appears for the download that informs you how many new transactions exist.

Before you process data between Sphere and The Raiser’s Edge, you should establish options for transactions. To determine transaction options, click **Options** on the Sphere page in The Raiser’s Edge. For more information, see “Configure The Raiser’s Edge” on page 12.

*Note:* If you merge or delete a supporter record in Sphere that was previously synchronized, you must manually change or delete the corresponding record in The Raiser’s Edge.

*Note:* You should periodically check the Sphere page in The Raiser’s Edge for transactions from the website. To make sure you have the latest information from the website, run the Scheduler. For more information, see “Synchronize Data” on page 24.

“Common Procedures” on page 40
“Sign-Up Requests” on page 44
“Profile Updates” on page 50
“Donations” on page 52
“Event Registrations” on page 65

Common Procedures

The information in this section is common for multiple transaction types. For example, you can assign a batch for the Donations and Event Registrations transaction types.

- Assign a batch for transactions
  Donation transactions create a gift batch in The Raiser’s Edge. You can select to create a new gift batch or use an existing gift batch to process donations.
  1. From the Sphere page in The Raiser’s Edge, click Donations. The Donations Transactions screen appears.
     You can also assign a batch for “Event Registrations” on page 65.
  2. From the menu bar, select Tools, Transaction Options. The Transaction Options screen appears.

     ![Batch Number Frame]

     3. In the Batch Number frame, to assign the batch the next available number in the program, select Use next available batch number.
        If you process transactions individually, the Use next available batch number option creates a new batch for every individual transaction row.

     4. To download the gifts to an existing batch in The Raiser’s Edge, select Add records to an existing batch. Click the binoculars to select the existing batch. If the batch includes a default set, the values apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.

     5. To load a default set of values from an existing batch for a new batch, select Load fields and default values from an existing batch. Click the binoculars to select the existing batch from which to load the default set. Because you are selecting a default set for a new batch, you can select from a previously committed batch.

Warning: When you select a default set, only the Defaults tab General values from Batch in The Raiser’s Edge load for Sphere transactions. Split gift, schedule, and honor/memorial values do not load for transactions. For more information about batch default sets, see the Batch Guide.
6. To return to the Donations Transactions screen, click OK. To confirm the correct batch number is assigned to the transaction, view **Current Batch Number** in the lower left corner of the screen.

- **Process attributes**

For “Donations” on page 52 and “Event Registrations” on page 65, you can open an attribute screen to view, edit, and process attributes the user selected on your website. On this screen, you can prevent invalid attributes from downloading to a record in The Raiser’s Edge.

1. On the transactions screen, select the Transaction Information tab.

**Tip:** This tab appears only if mapped attributes are available for the transaction.
2. In the Gift Attributes box, press F7 on your keyboard. An attributes screen appears. Attributes the user selected appear in the Values column.

   ![Attributes Screen]

   For Event Registrations, in the Event Participation Information box, press F7 to view participant attributes. For more information, see “Download event registrations - single transaction process” on page 66.

3. If the user entered an attribute you do not want to download to The Raiser’s Edge, unmark the Process checkbox.

4. To edit an invalid attribute, edit the attribute information in the Values column.

   **Warning:** If the attribute is a table, you must select an existing attribute in the Values column.

5. After you confirm the attributes on the screen are the ones to process to a Raiser’s Edge record, click Save and Close.

   - **Export transactions**

     Before you process transactions, you can export the transactions to a .csv file. This saves a record of the transactions included in the download process. You can export transactions for all transaction types. For more information about the export options, see “Export Options” on page 43.

     1. On the individual transaction screen, click Export Selected on the action bar. The Export Grid screen appears.

     **Note:** If Export Selected is disabled, select the checkbox beside the transaction row you want to export.

     2. Select the items to export. The items available depend on the transaction type.

        The Constituent Biographical Information and Sphere Details are standard export options for the transaction types. Constituent Biographical Information exports data for the constituent in the transaction. Sphere Details exports details about who, when, and where in Blackbaud Sphere the transaction was recorded.

     3. To open and review the .csv file after the export completes, select Open file when export is completed.
4. To separate field values with a line break in columns in the .csv file, select the **Format fields within columns** checkbox is marked.

   If the checkbox is not marked, a tab character separates the field values into columns in the .csv file.

5. Click **OK**. The Save As screen appears.

6. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles.

7. In the **File name** field, enter the name of the .csv file the export creates.

   The value in the **Save as type** field defaults to CSV Excel (*.csv).

8. Click **Save**. The export processes. If you marked the **Open file when export is completed** checkbox on the Export Grid screen, the .csv file opens. If you did not select the checkbox, you can access the file from the saved location.

**Export Options**

Review the following tables for information about the available export options for transaction types.

<table>
<thead>
<tr>
<th>Sign-Up Requests</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent Biographical Information</td>
<td>Constituent Attributes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profile Update</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent Biographical Information</td>
<td>Sphere Details</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Donations</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent Biographical Information</td>
<td>Gift Information</td>
</tr>
<tr>
<td>Fund Information</td>
<td>Payment Information</td>
</tr>
<tr>
<td>Transaction Tribute Information</td>
<td>Sphere Details</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Registrations</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituent Biographical Information</td>
<td>Fund Information</td>
</tr>
<tr>
<td>Payment Information</td>
<td>Participant Information</td>
</tr>
</tbody>
</table>
Sign-Up Requests

There are two main ways to process Sign-up Requests — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the Process Transaction button on the action bar if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.

- Single — You can select each row individually to match the user with an existing Raiser’s Edge record or add the user as a new record in the database.
- Bulk — You can select all users and process every transaction at once. If you select to process all transactions at once, you may need to clean up data in The Raiser’s Edge after processing completes.

- Download sign-up requests — single transaction process

When you use the single transaction process, you select each row individually to match the supporter from Sphere with an existing Raiser’s Edge constituent record or add the user as a new record in the database.

Note: Before you process sign-up requests, review the configuration options in “Configure The Raiser’s Edge” on page 12.

1. From the Sphere page in The Raiser’s Edge, click Sign-up Requests. The Sign-up Requests Transactions screen appears.

2. On the Sign-up Requests Transactions tab, select the row to process by clicking in the Sign-up Information column. The Record Linking tab appears on the right.

The Transaction Date/Status column displays the date the Blackbaud Sphere supporter entered a sign-up request. When selected, Checked out by and Checked out on information for the transaction displays. If the transaction is not currently selected, Not Checked Out displays.
3. In the **Constituent Linking** frame, data from Sphere appears in the **Transaction Data** box. If a constituent record in The Raiser’s Edge matches the supporter record, this information appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the constituent record, click **Open Constituent**.

![Constituent Linking Frame](image)

- If the supporter correctly matches the constituent, continue with step 4.
- If the **Linked Constituent** box is blank, you must link the Blackbaud Sphere supporter to an existing constituent record or create a new record.

**Tip:** If duplicate records are found, {Duplicates Found} appears in the **Linked Constituent** column. The search method is based on the **Constituent Matching** sections in **Options**. For more information, see “Constituent Matching” on page 16.

4. To search for an existing constituent, click **Find Constituent**.

**Tip:** If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** link appears. If **Linked** appears above the box, the **Edit Profile** link appears.
The Sphere Transaction screen appears.

a. Select the fields to search in the **Search Field** column on each tab.

Fields you selected in the **Constituent Matching** option are selected in the **Search Field** column by default. For information about this option, see “Constituent Matching” on page 16.

**Note:** We recommend you use only the most useful criteria fields to search for a record. To clear all fields at one time, click **Clear Search Criteria**.

b. To include inactive records in your search, select **Display inactive constituents**.

c. To include deceased constituents in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, you search for Will Adamson’s record. If you select the checkbox and search for “William Adamson”, the program does not return his record because the search looks for an exact match for “Will Adamson”. If you unmark the checkbox, the program initiates a “begins with” search which returns the record. We recommend using this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. The search results include records with **Has no valid address** marked in The Raiser’s Edge.
f. If a record matches, select the row in the **Link Sign-up to Raiser’s Edge Constituent** frame and click **Link Constituent, Choose Selected Constituent**. The Profile Information tab appears. The identifier number for the SphereConstituentIdentifier in the **Field** column appears in the **New Value** column. This value corresponds to the Supporter ID in Blackbaud Sphere. Click **Save and Close**. You return to the Record Linking tab.

**Note:** If you updated the information in the **New Value** column, a message appears notifying you the transaction has changed. To add these changes to The Raiser’s Edge, click **Yes**. If you do not want to add the changes to The Raiser’s Edge, click **No**.

g. If an existing record does not match the donor, click **Link Constituent, Create New Constituent**. For information about creating new constituents, see step 5.

5. To create a new record in The Raiser’s Edge, click **Create New, Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box to indicate a constituent record has been created in The Raiser’s Edge for the supporter.

6. To edit information the supporter entered, click **Create New, Create Constituent and Edit**. A screen appears to compare existing constituent record data with the supporter’s sign-up request information.

   a. For each field to update on the constituent record, select **Process**. If you clear **Process** for a field, the data does not appear in the batch file.

   b. Information provided by the supporter during the sign-up appears in the **New Value** column. To edit data a support entered, make changes in the appropriate row in this column.

   **Note:** The unique identifier generated for this transaction in The Raiser’s Edge automatically appears in the **New Value** column for the SphereConstituentIdentifier entry on the Constituent Attributes tab. This entry corresponds to the Supporter ID in Blackbaud Sphere. For more information about identifiers, see “Record Identifier Fields” on page 29.
c. Click Save and Close. You return to the Record Linking tab. Linked appears above the Linked Constituent box.

7. In the Transaction Constituent Code frame, the constituent code selected in Sphere Options appears. You can change or remove this constituent code.

**Note:** When you commit the batch, the constituent code you selected appears on the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on this tab. For information about selecting a constituent code in Sphere Options, see “New Constituents” on page 14.

8. To view additional information about the sign-up request, select the Details tab. The Sphere Details frame displays transaction information from Blackbaud Sphere. The Transaction Details frame displays which user downloaded the transaction to The Raiser’s Edge and which user, if any, is currently working with the transaction.
In the **Transaction Details** frame, information appears such as The Raiser’s Edge user that downloaded the transaction to the Sphere page and The Raiser’s Edge user currently using the transaction.

9. To process the selected sign-up, click **Process Transaction**.

To save your information, but not process the transaction, click **Process Transaction, Save Changes**. You can process the transaction at a later time.

10. Repeat this procedure to individually process the sign-up requests that remain.

11. When you finish, click **Close**. You return to the Sphere page.

- **Download sign-up requests — bulk process**

When you use bulk process, you select to download all sign ups to the The Raiser’s Edge and process every transaction at once. If you select to process everything at once, you need to clean up data in The Raiser’s Edge after processing completes.

1. From the Sphere page in The Raiser’s Edge, click **Sign-up Requests**. The Sign-up Requests Transactions screen appears.

**Warning:** You should select bulk processing only if you want to add all sign-up requests selected to **The Raiser’s Edge**. With bulk processing, you cannot control the information you import the same way you can if you process each record individually. Once the processing completes, you must locate the record in **The Raiser’s Edge** and make any changes necessary.

2. To process every transaction on the screen, select the **Select All** checkbox. Unmark the checkbox next to any names you do not want to process to The Raiser’s Edge.

3. Click **Bulk Processing**. The Process User Sign-up Requests screen appears.

4. On the Processing tab, review the process properties such as **Transactions Selected** and **Successfully Checked Out**.
5. On the Options tab, select options for **Unlinked Records** and **Transaction Profile Data** in the bulk process.
   a. In the **Unlinked Records** frame, to attempt constituent matching based on Constituent Matching options, select **Attempt auto-match to an existing record**. For more information, see “ Constituent Matching” on page 16.
   b. To create new Raiser’s Edge records for the website users, select **Create new Raiser’s Edge record automatically**.
   c. To ignore Raiser’s Edge required fields, select **Bypass required fields**.
      For information about required fields in The Raiser’s Edge, see the **Configuration and Security Guide**.
   d. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the website user. If you accept profile information, the data defaults to the constituent record in The Raiser’s Edge.

**Warning:** If you select **Accept Profile Information**, all data downloads to The Raiser’s Edge. This includes partial data from a transaction (such as an incomplete street address). If you select **Reject Profile Information**, the Connector will not download profile information during processing.


**Note:** The number of transactions, if any, that cannot be processed appears in the **Excluded Transactions** display in the **Selected Transaction Information** frame. Click **Close** to return to the Sign-up Request Transactions screen and create the appropriate links.

7. When processing completes, click **Close**. You return to the Sphere page.

### Profile Updates

You can update individual constituent records in The Raiser’s Edge with changes Blackbaud Sphere supporters make to their online profiles. From the Sphere page, you can process these updates as long as the individual was previously linked to a constituent record in The Raiser’s Edge. If the Raiser’s Edge record has been deleted, the transaction is invalid and you must reject the profile update.

You can process profile updates as single transactions, or use bulk processing. When you process profile updates as single transactions, you select each row individually to match the supporter with an existing constituent record or add the supporter as a new record in the database. With bulk processing, you can process all of the profile updates at once. If you select to process all profile updates at once, you may need to clean up data in **The Raiser’s Edge** after processing completes.

**Note:** The Sphere Connector does not process profile updates for organizations.

- **Download profile updates - single transaction process**
  1. From the Sphere page in The Raiser’s Edge, click **Profile Updates**. The Profile Updates Transactions screen appears.
  2. On the Profile Updates tab, select the row to process by clicking in the **Online Profile Information** column. Depending on the profile information the user updated, a variety of tabs appear on the right.
The Transaction Date/Status column displays the date the Blackbaud Sphere supporter updated profile information. When selected, Checked out by and Checked out on information for the transaction displays. If the transaction is not currently selected, Not Checked Out displays.

3. From the Profile Information tab on the right, select Process for each field you want to update on the corresponding constituent record. If you clear a Process checkbox, the information in The Raiser’s Edge remains the same.

**Tip:** To process every field on the tab, select Select All.

4. Information provided by the supporter appears in the New Value column. The corresponding information in The Raiser’s Edge appears in the Raiser’s Edge column. You can edit the information in the New Value column before you process the transaction.

**Tip:** New table entries appear in bold. If you have appropriate rights, you can create a new Raiser’s Edge table entry from this screen, or you can click in the row of the New Value column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

5. Repeat steps 3 and 4 for the remaining tabs.

6. To view additional information about the profile update, select the Details tab. The Sphere Details frame displays transaction information from Blackbaud Sphere. The Transaction Details frame displays which user downloaded the transaction to The Raiser’s Edge and which user, if any, is currently working with the transaction.

7. To process the information, click Process Transaction.

   To partially process a transaction, click Process Transaction, Apply Selected Updates. A partially processed transaction includes the changes for which you selected Process. If you import another profile update for the supporter, you can overwrite the information with this second profile update.

8. Repeat steps 2 through 7 to process additional profile updates on the Profile Updates Transactions screen.

**Tip:** To make sure you have the latest information from the website, click Refresh.

9. You can delete any transaction you do not want to process. To delete a transaction, select the row and click Delete Transaction.

   A message appears asking if you want to delete it. Click Yes.

10. When you finish, click Close. You return to the Sphere page in The Raiser’s Edge.
Download profile updates — bulk process

When you use bulk process, you select to download all profile updates to the *The Raiser’s Edge* and process every transaction at once. If you select to process everything at once, you need to clean up data in *The Raiser’s Edge* after processing completes.

1. From the Sphere page in The Raiser’s Edge, click **Profile Updates**. The Profile Updates Transactions screen appears.

   **Warning:** You should select bulk processing only if you want to add all profile updates selected to The Raiser’s Edge. With bulk processing, you cannot control the information you import the same way you can if you process each record individually. Once the processing completes, you must locate the record in The Raiser’s Edge and make any changes necessary.

2. To process every transaction on the screen, select the **Select All** checkbox. Unmark the checkbox next to any names you do not want to process to The Raiser’s Edge.

3. Click **Bulk Processing**. The Process Online Profile Updates screen appears.

4. On the Processing tab, review the process properties such as **Transactions Selected** and **Successfully Checked Out**.

5. On the Options tab, select options for profile updates in the bulk process.

   a. Click **Accept Profile Information**, **including**: to determine the profile updates to accept. You can select thon updates and address updates.

      If you select address updates, you have the option to either update and replace any existing address information with the new information you download from *Blackbaud Sphere*, or add the downloaded information as a new address for the constituent.

      If you choose to add the information as a new address, you can select make the new address the preferred address on the constituent record, and also determine the address type for the previous address to become.

   b. Click **Reject Profile Information** to automatically not accept profile updates for linked constituents.


   **Note:** The number of transactions, if any, that cannot be processed appears in the Excluded Transactions display in the Selected Transaction Information frame. Click **Close** to return to the Profile Update Transactions screen and create the appropriate links.

7. When processing completes, click **Close**. You return to the Sphere page.

   **Note:** While processing, if an incoming record from *Blackbaud Sphere* corresponds to a record that has been deleted in *The Raiser’s Edge*, a message will appear to ask if you would like to remove the constituent associated with the transaction.

Donations

There are two main ways to process Donations — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button on the action bar if you are going to download transactions using the bulk process. Read this section entirely to learn about the information available for both processes.
• **Single** — You can select each row individually to match the donor with an existing Raiser’s Edge record or add the donor as a new record in the database.

• **Bulk** — You can select all donors and process every donation at once. If you select to process all donations at once, you may need to clean up data in The Raiser’s Edge after processing completes.

When you process transactions, you must make more decisions beyond using the single or bulk process. For example, you may want to create a batch in The Raiser’s Edge to specifically use for donations from Sphere. Or, you may want to create the batch in the Donations transaction. Review the following diagram for an example of one way to process donations. Before you begin regularly processing transactions, a best practice decision should be made for your organization.

When you process a transaction imported from Blackbaud Sphere, The Raiser’s Edge creates a batch record. You can view the batch to determine if the information is correct. Then, you must commit each batch to create or update the information. For information about batches in The Raiser’s Edge, see the *Batch Guide*.

The Sphere Connector automatically links donations you download from Blackbaud Sphere to the default campaign for the corresponding fund in The Raiser’s Edge. To add the donation to a different campaign, you can link the donation to a different fund on the Donations Transactions screen. For donation information you send to Blackbaud Sphere from The Raiser’s Edge, Sphere uses the campaign mapping you defined from the Connector Sync page to determine which Sphere campaign receives credit for the donation. For information about the Campaigns tab on the Connector Sync page, see the Sphere online Help.
Download donations - single transaction process

When you use the single transaction process, you select each row individually to match the donor with an existing Raiser’s Edge record or add the donor as a new record in the database.

**Note:** Before you process donations, review the configuration options in “Configure The Raiser’s Edge” on page 12.

1. From the Sphere page in The Raiser’s Edge, click **Donations**. The Donations Transactions screen appears.

   **Note:** Donation transactions create a gift batch in The Raiser’s Edge. From **Tools, Transaction Options**, you can select batch options before you process a donation. The batch screen does not appear until you process the donation. For more information, see either step 14 or “Assign a batch for transactions” on page 40.

2. On the Donations tab, select the row to process by clicking in the **Donor Information** column. The Record Linking tab appears on the right.

The **Gift Information** column displays the donation amount, the gift date, fund, and source (or appeal). If you support multiple currency types, review the following:

- If a gift amount has been converted to your local currency, the converted amount displays in “( )” in the **Gift Information** column.

- Exchange rates are established in Raiser’s Edge **Configuration**. For more information, see the **Configuration & Security Guide**.

The **Transaction Date/Status** column displays the date the Blackbaud Sphere supporter entered the donation. When selected, **Checked out by** and **Checked out on** information for the transaction displays. If the transaction is not currently selected, **Not Checked Out** displays.
3. In the **Constituent Linking** frame, data from Sphere appears in the **Transaction Data** box. If a constituent record in The Raiser’s Edge matches the supporter record, this information appears in the **Linked Constituent** box and the **Auto-matched** indicator appears. To open the constituent record, click **Open Constituent**.

![Constituent Linking Frame](image)

- If the supporter correctly matches the constituent, continue with step 4.
- If the **Linked Constituent** box is blank, you must link the Blackbaud Sphere supporter to an existing constituent record or create a new record.

**Note:** For organizations, this information appears in the **Organization Linking** frame. If auto-match does not locate a matching organization record in The Raiser’s Edge, click **Find Organization** to search for a constituent record to link to the organization.

**Tip:** If duplicate records are found, **(Duplicates Found)** appears in the **Linked Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see “Constituent Matching” on page 16.

4. To search for an existing constituent, click **Find Constituent**.

**Tip:** If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

The Sphere Transaction screen appears.

a. Select the fields to search in the **Search Field** column on each tab.

The fields that default with a checkbox in the **Search Field** column are the fields selected in the **Constituent Matching** option.

**Note:** We recommend you use only the most useful criteria fields to search for a record. Adding too many criteria may actually prevent you from locating a record. To clear all fields at once, click **Clear Search Criteria**.

b. To include inactive records in your search, select **Display inactive constituents**.

c. To include deceased constituents in your search, select **Display deceased constituents**.
d. To search by exact criteria, select **Exact match only**. For example, you search for Will Adamson’s record. If you select the checkbox and search for “William Adamson”, the program does not return his record because the search looks for an exact match for “Will Adamson”. If you unmark the checkbox, the program initiates a “begins with” search which returns the record. We recommend using this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen. Results in this grid cannot exceed 100 records. The search results include records with **Has no valid address** marked in The Raiser’s Edge.

f. If a record matches, select the row and click **Link Constituent, Choose Selected Constituent**.

![Image](image.png)

**Note**: If you changed any data the user entered in the **New Value** column, a message appears notifying you the download transaction has changed. To add the changed data to The Raiser’s Edge, click **Yes**. If you do not want to add the data to The Raiser’s Edge, click **No**.

g. If an existing record does not match the donor, click **Link Constituent, Create New Constituent**. For information about creating new constituents, see step 5.
5. To create a new record in The Raiser’s Edge, click **Create New, Create Constituent**. The Profile Information tab appears.

![Profile Information Tab]

**Note:** The identifier number for the **SphereConstituentIdentifier** in the **Field** column appears in the **New Value** column. This value corresponds to the Supporter ID in Blackbaud Sphere. For more information about identifiers, see “Record Identifier Fields” on page 29.

**Note:** New table entries appear in bold. If you have appropriate rights, you can create a new table entry from this screen, or you can click in the row of the **New Value** column to select an existing table entry. To keep data consistent, it is important to try to use existing table entries.

6. Click **Save and Close**. You return to the Donations Transactions screen. In the **Constituent Linking** frame, **Linked** appears above the **Linked Constituent** box. The supporter now has a constituent record in The Raiser’s Edge.

![Constituent Linking Frame]

7. In the **Transaction Constituent Code** frame, the constituent code selected in Sphere Options appears. You can change or remove this constituent code.

**Note:** When you commit the batch, the constituent code you selected appears on the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on this tab. For information about selecting a constituent code in Sphere Options, see “New Constituents” on page 14.
8. In the **Tribute Linking** frame, in the **Transaction Data** box, view tribute information if the donation was made in honor or memory of another person.

**Note:** To view and link tribute information, your organization must have the **Tribute** module for The Raiser’s Edge. For information about how to access this module, contact your Blackbaud account manager.

a. To search for an existing Raiser’s Edge tribute, click **Find Tribute**.

The Link Tribute Information screen appears. The **Tribute Information from Transaction**, **Linked Tribute Information**, and **Acknowledgee** data defaults from the website.

b. In the **Honor/Memorial** field, search for an existing Raiser’s Edge honor/memorial record.

c. In the **Tribute** field, select a tribute type from The Raiser’s Edge.

d. In the **Acknowledgee** box, to link the acknowledgee to a Raiser’s Edge relationship record, press **F7**. A screen appears for you to link to an existing record in The Raiser’s Edge. If the acknowledgee does not have an existing record, return to the Link Tribute Information screen. When you click **OK** on this screen, a new relationship record is created for the acknowledgee.

After you link the acknowledgee to a Raiser’s Edge record, acknowledgee information appears in the **Linked Record** box.

e. To return to the **Tribute Linking** frame, click **OK**. Tribute data from The Raiser’s Edge appears in the **Linked Tribute** box. **Linked** appears above the box.
f. To create a new tribute record in The Raiser’s Edge, click **Create New Tribute**. **Linked** appears above the **Linked Tribute** box. A record has been created in The Raiser’s Edge for the tribute.
9. From the **Transaction Data** box, you can view the fund information for the donation in the **Fund Linking** frame.

**Note:** If the amount of the donation is split between two or more funds, each fund appears in the **Transaction Data** box under **Fund Linking**. If a fund does not have a corresponding Raiser’s Edge fund in the **Linked Funds** box, you must manually link it to the correct fund.

If you mapped the Blackbaud Sphere fund to a fund in The Raiser’s Edge, the matching fund appears in the **Linked Funds** box.

a. If the fund is not matched, click **Find Funds**. The Gift Fund Details screen appears.

b. Search for the fund to link to the transaction.

c. Click **OK**. You return to the Record Linking tab. Fund data from The Raiser’s Edge appears in the **Linked Funds** box.

**Note:** You can link the Blackbaud Sphere fund to a different fund in The Raiser’s Edge from the batch screen after you process the transaction. For information about how to edit batch information, see the **Batch Guide**.
10. In the **Matching Gift Linking** frame, in the **Transaction Data** box, you can enter matching gift information for the donation.

a. If you are aware the supporter works for a matching gift company, click **Manage Matching Gifts**. The Matching Gift Pledges screen appears.

b. To select a matching gift company, click **Add**. The search screen appears.
• If the company does not have an organization record in The Raiser’s Edge, click **Add New** to create a new record.
• If the company exists in The Raiser’s Edge, select the organization’s constituent record and click **Open**.
• Enter a matching gift amount in **Pledge amount**. To include additional matching gifts, click **Add**.

11. Click **OK**. You return to the Record Linking tab. For more information about matching gifts in The Raiser’s Edge, see the *Gift Records Guide*.

12. To view gift attribute information, select the Transaction Information tab. For information about processing attributes, see “Process attributes” on page 41.

When you commit a gift batch containing records imported from Blackbaud Sphere, the Sphere Page ID, Sphere Transaction GUID, Sphere Transaction ID, and SphereGiftIdentifier automatically appear on the Attributes tab of the corresponding gift record in The Raiser’s Edge. However, only the SphereGiftIdentifier appears as a gift attribute on the Transaction Information tab.
13. To view additional information about the donation, select the Details tab. The **Sphere Details** frame displays transaction information from Blackbaud Sphere. The **Transaction Details** frame displays which user downloaded the transaction to The Raiser’s Edge and which user, if any, is currently working with the transaction.

14. To download the donation, click **Process Transaction**. To save your information but not process the transaction, click **Process Transaction, Save Changes**. You can process the transaction at another time.

The message “Batch # [ ] was created. Do you want to open the batch now?” appears.

**Note:** The batch number is determined by your selection from **Tools, Transaction Options**. In Transaction Options, you can select to create a new batch or use an existing batch for donations. For more information, see “Assign a batch for transactions” on page 40.

15. To view the gift in batch, click **Yes**. The batch screen appears. After you view the gift, click **Save and Close**. You return to the Donations Transactions screen.

**Note:** You must commit each batch to complete the process. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to The Raiser’s Edge. For more information, see the **Batch Guide**.

If you do not want to view the gift in the batch, click **No**. You return to the Donations Transactions screen.

**Note:** To delete a donation you do not want to process, click **Delete Transaction**.

16. Repeat this procedure to process each transaction on the Donations Transactions screen.

**Tip:** To make sure you have the latest information from the website, click **Refresh**.
Download donations - bulk process

When you use bulk process, you select to download all donors as new records in The Raiser’s Edge and process all donations at one time. You may need to clean up data in The Raiser’s Edge after processing completes.

**Note:** Before you process donations, review the configuration options in “Configure The Raiser’s Edge” on page 12.

1. From the Sphere page in The Raiser’s Edge, click **Donations**. The Donations Transactions screen appears.

**Tip:** To make sure you have the latest information from the website, click **Refresh**.

2. To process every transaction on the screen, select **Select All**. Clear the checkbox next to any transactions you do not want to process.
3. Click **Bulk Processing**. The Process Online Donations screen appears.
4. On the Processing tab, you can review details about the bulk process such as the number of transactions selected and the number successfully checked out.
5. On the Options tab, select options for **Batch Number**, **Unlinked Records**, and **Transaction Profile Data** for the bulk process.
   a. In the **Batch Number** frame, select how to process the bulk donations in **Batch**.
   • To create a new batch that uses the next available batch number in The Raiser’s Edge, select **Use the next available batch number**.

**Note:** You can also select these batch options from **Tools, Transaction Options** on the Donations Transactions screen. For more information, see “Assign a batch for transactions” on page 40.

- To download the gifts to an existing batch in The Raiser’s Edge, select **Add records to an existing batch**. Click the binoculars to select the existing batch. If the batch includes a default set, these values also apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.
- To load a default set of values from an existing batch for a new batch, select **Create a new batch and use existing batch below for default fields and values**. Click the binoculars to select the existing batch from which to load the default set. Because you are selecting a default set for a new batch, you can select from a previously committed batch.
  b. In the **Unlinked Records** frame, select how to link Blackbaud Sphere transactions to constituent records in The Raiser’s Edge.
- To attempt constituent matching based on the options in **Constituent Matching**, select **Attempt auto-match to an existing record**. For more information, see “Constituent Matching” on page 16.
- To create a new constituent record for the supporter, select **Create new Raiser’s Edge record automatically**.
- To ignore required fields in The Raiser’s Edge, select **Bypass required fields**. For information about required fields in The Raiser’s Edge, see the **Configuration and Security Guide**.
c. In the **Transaction Profile Data** frame, select **Accept Profile Information** or **Reject Profile Information**. If you accept profile information, the supporter’s information appears on the corresponding constituent record in The Raiser’s Edge.

**Warning:** Be aware if you reject data on the Donations Transactions screen and select **Accept Profile Information**, *all* data downloads to The Raiser’s Edge. This includes partial data from a transaction (for example, an incorrect street address) and rejected transactions. If you reject data on the Donations Transactions screen, select **Reject Profile Information** to reject that data and download the remaining data to The Raiser’s Edge.

6. From the Processing tab, click **Process Now**. Bulk processing begins.

**Note:** The number of transactions, if any, that cannot be processed appears in the **Excluded Transactions** display in the **Selected Transaction Information** frame. Click **Close** on the Process Online Donations screen to return to the Donations Transactions screen and create the appropriate links.

When the process completes, the message “Batch # [ ] was created. Do you want to open the batch now?” appears.

7. To view this donation batch, click **Yes**. The batch screen appears.

8. To commit this batch, click **Commit**. For more information about how to commit batches in The Raiser’s Edge, see the **Batch Guide**.

**Note:** You must commit each batch to complete the process. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to The Raiser’s Edge.

9. If you do not want to commit the batch at this time, click **Save and Close**. You return to the Donations Transactions screen.

### Event Registrations

When an individual registers for an event in Blackbaud Sphere, you download the information from Sphere to The Raiser’s Edge. For event registrations with a gift, such as an event fee, you can choose to create a new batch in The Raiser’s Edge or use an existing batch to process gifts. For more information, see “Assign a batch for transactions” on page 40.

There are two main ways to process Event Registrations — single and bulk. We do not recommend combining steps between these two processes. For example, do not use the **Process Transaction** button on the action bar if you are going to download transactions using the bulk process.

- **Single** — You can select each row individually to match the registrant with an existing Raiser’s Edge record or add the registrant as a new record in the database.
- **Bulk** — You can select all registrants and process every transaction at once. If you select to process all registrants at once, you may need to clean up data in The Raiser’s Edge after processing completes.
When you process transactions, you must make decisions beyond using the single or bulk process. For example, you may want to create a batch in The Raiser’s Edge to use for only event registration donations from Sphere. Or, you may want to create the batch in the Event Registrations transaction. Review the following diagram for an example of one way to process event registration donations.

The Sphere Connector links gifts you download from Blackbaud Sphere to the default campaign for the corresponding fund in The Raiser’s Edge. You can link the gift to a different fund from the batch file. For more information about how to manage batch gifts, see the Batch Guide.

- Download event registrations - single transaction process

  When you use the single transaction process, you select each row individually to match the registrant with an existing constituent record or add the registrant as a new record in the The Raiser’s Edge.

  **Note:** Before you process event registrations, review the configuration options in “Configure The Raiser’s Edge” on page 12.

  1. From the Sphere page in The Raiser’s Edge, click Event Registrations. The Event Registrations Transactions screen appears.

  **Note:** Event Registration transactions create a gift batch in The Raiser’s Edge. From Tools, Transaction Options, you can select batch options before you process a registration. The batch screen does not appear until you process the registration. For more information, see step 13. You can also review “Assign a batch for transactions” on page 40.
2. On the Event Registrations Transactions tab, click in the Donor Information column of the row you want to process. The Record Linking tab appears on the right.

The Gift Information column displays the donation amount and other details. If you support multiple currency types, review the following:

- If a gift amount has been converted to your local currency, the converted amount displays in “()” in the Gift Information column.
- Exchange rates are established in Configuration in The Raiser’s Edge. For more information, see Configuration & Security Guide.

The Transaction Date/Status column displays the date the Blackbaud Sphere supporter registered for the event. When selected, Checked out by and Checked out on information for the transaction displays. If the transaction is not currently selected, Not Checked Out displays.

3. In the Constituent Linking frame, data from Sphere appears in the Transaction Data box. If a constituent record in The Raiser’s Edge matches the supporter record, this information appears in the Linked Constituent box and the Auto-matched indicator appears. To open the constituent record, click Open Constituent.

- If the registrant correctly matches the constituent, continue with step 4.
• If the **Linked Constituent** box is blank, you must link the registrant to an existing constituent record or create a new record.

**Tip:** If duplicate records are found (Duplicates Found) appears in the **Linked Constituent** column. The search method is based on the settings in the **Constituent Matching** option. For more information, see “Constituent Matching” on page 16.

4. To search for an existing constituent, click **Find Constituent**. The Sphere Transaction screen appears.

**Tip:** If the **Linked Constituent** box does not have an indicator or if **Auto-matched** appears above the box, the **Find Constituent** button appears. If **Linked** appears above the box, the **Edit Profile** button appears.

a. Select the fields to search in the **Search Field** column on each tab.

Fields you selected in the **Constituent Matching** option are selected in the **Search Field** column by default. For information about this option, see “Constituent Matching” on page 16.

**Note:** We recommend you use only the most useful criteria fields to search for a record. To clear all search fields at one time, click **Clear Search Criteria**.

b. To include inactive records in your search, select **Display inactive constituents**.

c. To include deceased constituents in your search, select **Display deceased constituents**.

d. To search by exact criteria, select **Exact match only**. For example, you search for Will Adamson’s record. If you select the checkbox and search for “William Adamson”, the program does not return his record because the search looks for an exact match for “Will Adamson”. If you unmark the checkbox, the program initiates a “begins with” search which returns the record. We recommend using this checkbox to narrow a large list of results.

e. To begin the search, click **Find Now**. Results appear in the grid at the bottom of the screen.

Results in this grid cannot exceed 100 records. The search results include records with **Has no valid address** marked in The Raiser’s Edge.
f. If a record matches, select the row in the **Link Online Registrant to Raiser’s Edge Constituent** frame and click **Link Constituent, Choose Selected Constituent**. The Profile Information tab appears. The identifier number for the SphereConstituentIdentifier in the Field column appears in the **New Value** column. This value corresponds to the registrant’s Supporter ID in Blackbaud Sphere. Click **Save and Close**. You return to the Record Linking tab.

<table>
<thead>
<tr>
<th>Field</th>
<th>New Value</th>
<th>Search Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Sarah</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Barkley</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah Barkley</td>
<td>120 My Town Road</td>
</tr>
</tbody>
</table>

**Note:** If you change information in the **New Value** column, a message appears notifying you the transaction has changed. To add the updated information to The Raiser’s Edge, click **Yes**. If you do not want to add the information to The Raiser’s Edge, click **No**.

g. If an existing record does not match the donor, click **Link Constituent, Create New Constituent**. For information about how to create new constituents, see step 5.

5. To create a new record in The Raiser’s Edge, click **Create New, Create Constituent** in the **Constituent Linking** frame. **Linked** appears above the **Linked Constituent** box to indicate a constituent record has been created in The Raiser’s Edge for the registrant.

6. To edit information the registrant entered, click **Create New, Create Constituent and Edit**. A screen appears to compare existing constituent record data with the event registration information imported from Blackbaud Sphere.

a. For each field to update on the constituent record, select **Process**. If you clear **Process** for a field, the data does not appear in the batch file.
b. Information provided by the registrant during the registration process appears in the New Value column. To edit this information, update the appropriate row in this column.

**Note:** The unique identifier generated for this transaction in The Raiser’s Edge automatically appears in the New Value column for the SphereConstituentIdentifier entry on the Constituent Attributes tab. This entry corresponds to the Supporter ID in Blackbaud Sphere. For more information about identifiers, see “Record Identifier Fields” on page 29.

c. Click Save and Close. You return to the Record Linking tab. Linked appears above the Linked Constituent box.

7. In the Transaction Constituent Code frame, the constituent code selected in Sphere Options appears. You can change or remove this constituent code.

**Note:** When you commit the batch, the constituent code you selected appears on the Bio 2 tab of the constituent record. However, the constituent code does not duplicate if it already exists on this tab. For information about selecting a constituent code in Sphere Options, see “New Constituents” on page 14.
8. From the **Transaction Data** box, you can view the fund information for the donation in the **Fund Linking** frame.

If you mapped the Blackbaud Sphere fund to a fund in The Raiser’s Edge, the matching fund appears in the **Linked Funds** box.

a. If the fund is not matched, click **Find Funds**. The Gift Fund Details screen appears.

b. Search for the fund to link to the transaction.

c. Click **OK**. You return to the Record Linking tab. Fund data from The Raiser’s Edge appears in the **Linked Funds** box.

*Note:* You can link the Blackbaud Sphere fund to a different fund in The Raiser’s Edge from the batch screen after you process the transaction. For information about how to edit batch information, see the **Batch Guide**.

9. In the **Event Linking** frame, in the **Transaction Data** box, view the event this supporter registered for in Blackbaud Sphere. If you mapped this event to an event in The Raiser’s Edge, the matching event appears in the **Linked Events** box.
a. If the event is not matched, click **Find Events**. The Event Details screen appears.

![Event Details Screen](image)

b. Search for the event to link to the registration.

c. Click **OK**. You return to the Record Linking tab. Event information from The Raiser’s Edge appears in the **Linked Events** box.

**Note:** You can link the Blackbaud Sphere event to a different event in The Raiser’s Edge from the batch screen after you process the transaction. For information about how to edit batch information, see the **Batch Guide**.

10. In the **Matching Gift Linking** frame, in the **Transaction Data** box, you can enter matching gift information for the donation.

   a. If you are aware the registrant works for a matching gift company, click **Manage Matching Gifts** to select a matching gift company. The Matching Gift Pledges screen appears.

![Matching Gift Pledges Screen](image)

b. To select a matching gift company, click **Add**. The search screen appears.
• If the company does not have an organization record in The Raiser’s Edge, click Add New to create a new record.

• If the company exists in The Raiser’s Edge, select the organization’s constituent record and click Open.

• Enter a matching gift amount in Pledge amount. To include additional matching gifts, click Add.

  c. Click OK. You return to the Record Linking tab. For more information about matching gifts in The Raiser’s Edge, see the Gift Records Guide.

11. To view event attribute information, select the Transaction Information tab. The SphereGiftIdentifier imported from the Blackbaud Sphere appears in the Gift Attributes frame. In the Participant Information frame, you can view the event for which the participant registered and participant attributes.
12. To view additional information about the event registration, select the Details tab. The Sphere Details frame displays transaction information from Blackbaud Sphere. The Transaction Details frame displays which user downloaded the transaction to The Raiser’s Edge and which user, if any, is currently working with the transaction.

13. To process the registration, click Process Transaction. To save your information but not process the transaction, click Process Transaction, Save Changes. You can process the transaction at another time. The message “Batch # [ ] was created. Do you want to open the batch now?” appears.

**Note:** The batch number is determined by the selection from the Tools, Transaction Options menu. In Transaction Options, you can select to create a new batch or use an existing batch for donations. For more information, see “Assign a batch for transactions” on page 40.

14. To view this event registration batch, click Yes. The batch screen appears.

15. To commit this batch, click Commit. For more information about how to commit batches in The Raiser’s Edge, see the Batch Guide.

**Note:** You must commit each batch to complete the process. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to The Raiser’s Edge.

16. If you do not want to commit the batch at this time, click Save and Close. You return to the Event Registrations Transactions screen.

17. Repeat this procedure to process all transactions on the Event Registrations Transactions screen.
Download event registrations - bulk process

When you use bulk process, you select to download all registrants as new records in The Raiser’s Edge and process every registration at once. If you select to process everything at once, you need to clean up data in The Raiser’s Edge after processing completes.

1. From the Sphere page in The Raiser’s Edge, click Event Registrations. The Event Registrations Transactions screen appears.

**Tip:** To make sure you have the latest information from the website, click Refresh.

2. To process every transaction on the screen, select Select All. When you select this, a checkbox appears for every row. Unmark the checkbox next to any names you do not want to process to The Raiser’s Edge.

   To delete registrations you do not want to process, select the box beside the rows you do not want to process. Click Delete Selected. A message appears asking if you are sure you want to delete the registrations. Click Yes.


4. On the Processing tab, review bulk properties such as Transactions Selected and Successfully Checked Out.

5. On the Options tab, select options for Batch Number, Unlinked Records, and Transaction Profile Data in the bulk process.

   a. In the Batch Number frame, select how to process the bulk donations to Raiser’s Edge Batch.

   • To create a new batch that uses the next available batch number in The Raiser’s Edge, select Use the next available batch number.

**Note:** These batch options also appear from the Tools, Transaction Options menu. For more information, see “Assign a batch for transactions” on page 40.

   • To download the gifts to an existing batch in The Raiser’s Edge, select Add records to an existing batch. Click the binoculars to select the existing batch. If the batch includes a default set, the values apply to the gifts you include in the existing batch. You cannot select an existing batch that has already been committed.

   • To load a default set of values from an existing batch for a new batch, select Load fields and default values from an existing batch. In the field below, click the binoculars to select the existing batch from which to load the default set. Because you are selecting a default set for a new batch, you can select from a previously committed batch.

   b. To create a query of participants in this bulk process, select Create participant query. We recommend creating a query of processed transactions for your records. The query appears in Query in The Raiser’s Edge.

   c. In the Unlinked Records frame, to attempt constituent matching based on the options in Constituent Matching, select Attempt auto-match to an existing record. For more information, see “Constituent Matching” on page 16.

   d. To create a new Raiser’s Edge record for the donor, select Create new Raiser’s Edge record automatically.
e. To ignore Raiser’s Edge required fields, select **Bypass required fields**.

For information about required fields in The Raiser’s Edge, see the *Configuration and Security Guide*.

f. In the **Transaction Profile Data** frame, select to **Accept Profile Information** or **Reject Profile Information** from the donor. If you accept profile information, the data defaults to the constituent record in The Raiser’s Edge.

Accept Profile Information is marked by default for each bulk process. To reject information, you must select **Reject Profile Information** for each bulk process.

**Warning:** Be aware if you reject data on the Event Registrations Transactions screen and select **Accept Profile Information**, **all** data downloads to The Raiser’s Edge. This includes partial data from a transaction (for example, an incorrect street address) and rejected transactions. If you reject data on the Event Registrations Transactions screen, select **Reject Profile Information** to reject that data and download the remaining data to The Raiser’s Edge.


**Note:** The number of transactions, if any, that cannot be processed appears in the **Excluded Transactions** display in the **Selected Transaction Information** frame. Click **Close** on the Process Online Donations screen to return to the Event Registrations Transactions screen and link the appropriate information.

When the process completes, the message “Batch # [ ] was created. Do you want to open the batch now?” appears.

**Note:** You can assign a batch number to the bulk process. For more information, see “Assign a batch for transactions” on page 40.

7. To view this event registration batch, click **Yes**. The batch screen appears.

8. To commit this batch, click **Commit**. For more information about how to commit batches in The Raiser’s Edge, see the **Batch Guide**.

**Note:** You must commit each batch to complete the process. Batch exceptions may occur for any problem found in the batch. These appear either on the Validate Batch screen or when you commit the batch to The Raiser’s Edge.

9. If you do not want to commit the batch at this time, click **Save and Close**. You return to the Event Registrations Transactions screen.

**Advocacy Actions**

You can import advocacy actions in Blackbaud Sphere into The Raiser’s Edge. From the Sphere page, you can match the advocate with an existing constituent record or add the advocate as a new record in the database.
Download advocacy actions

1. From the Sphere page in The Raiser’s Edge, click **Advocacy Actions**. The Process Advocacy Transactions screen appears.

If the advocate was automatically matched to a constituent in The Raiser’s Edge based on the options in **Constituent Matching**, the **RE Constituent** column displays the constituent’s name and address. The **Advocate Information** column displays the advocate’s name and address. The **Action Taken** column displays the type of action taken and the date the advocate performed the action. The **Recipients** column displays the individuals or groups who received the email, letter, fax, or other action. The **Issue** column displays the topic you selected in the **Action Topic Classification** field on the action item’s Properties page in Blackbaud Sphere.

2. Select the checkbox in the **Process?** column for each action you want to add to the corresponding constituent record.

**Right now, there is a random checkbox on the side of the screen you can click to select all checkboxes. I didn’t call it out in the documentation because it’s clearly a design mistake. They won’t fix this until the next release, so be sure to add the Select All checkbox and label information as a note above. -GC**

**Tip:** To make sure you have the latest information from the website, click **Refresh**.

3. From **Processing options**, you can select how the program processes the advocacy transactions you selected.

- To create a query from the actions added to the database, select **Create a query of action records added**. The query appears in **Query** in The Raiser’s Edge.
- To link each advocate with a constituent record identified by the auto-match rules in **Constituent Matching**, select **Link auto-matched**. For more information, see “Constituent Matching” on page 16.
• To create a new Raiser’s Edge record for the advocate and link the action to this record, select Auto-create.

Note: When you select Auto-create, the program automatically selects the Link auto-matched checkbox. This way, you always link the advocacy action to the new constituent record.

4. You can delete any transaction you do not want to process. To delete a transaction, select the row and click Delete Transaction.

A message appears asking if you want to delete the action. Click Yes.

5. To process the advocacy transactions, select Process Transactions. You can process a single row or all rows with the Process? column checkbox selected.


Contact Lists

During the synchronization process, you can export constituent queries in The Raiser’s Edge to Blackbaud Sphere as contact lists. In Query in The Raiser’s Edge, you can create lists of constituents who share common aspects, such as similar interests, giving histories, or income levels. Once you import this information into Blackbaud Sphere as contact lists, you can target these constituents, or Sphere supporters, with online marketing messages designed specifically for them. To view contact lists imported from The Raiser’s Edge, select Contacts, Database Management, Contacts Lists in Blackbaud Sphere.

For information about how to create a query in The Raiser’s Edge, see the Query and Export Guide. For more information about contact lists in Blackbaud Sphere and how to use these lists for online marketing, see the Sphere online Help.
- Create a contact list in Blackbaud Sphere

  1. From the Sphere page in The Raiser’s Edge, click Queried Contact Lists. The Constituent Queries screen appears.

  2. Select each constituent query you want to convert to a contact list in Blackbaud Sphere.

     **Tip:** To select all queries in the list at one time, select General.

  3. Click OK. You return to the Sphere page.

     If you selected a dynamic query, each time the synchronization occurs, The Raiser’s Edge exports the updated query results to Blackbaud Sphere.

**Troubleshooting**

If you experience any issues with the Sphere Connector, please review this section or see the Error Handling section of the Sphere online Help. For additional assistance, contact Blackbaud Sphere Support.

**Out of Sync Error**

At some time, you may receive an out-of-sync error. This error appears as an entry on the Log tab in the Integration Control Panel in The Raiser’s Edge. Click the Sphere link to open Blackbaud Sphere to view the error notification on the Most Recent tab in Blackbaud Sphere. You can also view the error message in the Status column on the History tab in Blackbaud Sphere.

The error occurs when Blackbaud Sphere expects to import the next batch ID number in sequence from The Raiser’s Edge, but receives a batch with a different ID number. For information about what may cause an out-of-sync error, see the Error Handling section of the Sphere online Help.
To resolve the issue, Blackbaud Sphere automatically resets the batch ID number to the next number in the sequence. For example, Sphere expects to import batch 100 during the next synchronization. However, The Raiser’s Edge exports batch 101. Blackbaud imports and processes the batch files and updates the batch ID to 102. The next batch ID Blackbaud Sphere expects to receive is batch 103.

**New Sphere Connector Version Notification**

A notification message appears on the Most Recent tab in Blackbaud Sphere when Blackbaud releases a new version of the Sphere Connector. You can access the latest version of the Sphere Connector at http://www.blackbaud.com/support/downloads/downloads.aspx. Follow the directions on the Downloads page to download the installation files.
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