

Batch and Import Guide

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BatchImport-2013

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Batch Configuration

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Before you can manage batches, we recommend you configure the numbering schemes, workflows, and templates of your batches. From the Batch Entry page in *Revenue*, you can access these configuration options under **Configuration**.

Configure Batch Numbering Schemes

On the Batch Numbering Schemes page, you manage the numbering schemes used to create batches. To access the Batch Numbering Schemes page from the Batch Entry page, click **Batch numbering schemes** under **Configuration**.



The **Batch numbering schemes** grid displays the batch numbering schemes in your database. For each numbering scheme, you can view its name and next available batch number. From the grid, you can manage the batch numbering schemes in the database. To keep batch numbers consistent and prevent duplicate batch numbers, you can apply one numbering scheme to all auto-generated batches, regardless of batch template type. Select a numbering scheme in the grid and click

Use globally. After you make a numbering scheme "global," all existing batch templates use this scheme as well as all future batch templates.

Note: Numbering starts with the next batch number in the global scheme that is not a duplicate of an existing batch. For example, if the next number available in the global scheme is 50, but there are already existing batches using numbers 51 through 120, the global scheme starts numbering at 121 to prevent duplicates.

To turn off the global numbering scheme, select the numbering scheme and click **Do not use globally**. The global numbering scheme is no longer applied to all batches; however, this scheme remains the default on existing batch templates unless a different scheme is selected.

To update the information that appears in the grid, click **Refresh** on the action bar.

Add Batch Numbering Schemes

You add batch numbering schemes from the Batch Numbering Schemes page in Batch Entry. You can create manual or auto-generated numbering schemes. To manually enter the batch number as you create batches, create a 'Manual' numbering scheme. For manual numbering schemes, the batch number options are disabled and you specify only the exception identifier. When you create a 'Manual' numbering scheme, you enter the batch number for the specific batch.

If you want the program to assign numbers to new batches automatically, create an 'Auto-generated' numbering scheme. For auto-generated numbering schemes, you can define the batch identifier and/or date formats, and the order in which they appear. The program assigns batch numbers for new batches automatically.

► Add a batch numbering scheme

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch numbering schemes**. The Batch Numbering Schemes page appears.
3. On the action bar of the **Batch numbering schemes** grid, click **Add**. The Add a batch numbering scheme screen appears.

Add a batch numbering scheme

General information

Name:

Type:

Batch number

Preview batch number: 1

Order	Details	Separator
<input type="checkbox"/> 1	Next sequence: <input type="text" value="1"/>	<input type="text" value="<None>"/>
<input type="checkbox"/> 2	Leading zeroes: <input type="text" value="#"/>	<input type="text" value="<None>"/>
<input type="checkbox"/> 3	Batch identifier: <input type="text"/>	<input type="text" value="<None>"/>
<input type="checkbox"/> 4	Date: <input type="text" value="MM-DD-YY"/>	<input type="text" value="<None>"/>

Exception batches

Preview exception batch number: 2

☒ Use the next available batch number

☐ Use the original batch number and append an exception sequence

Exception identifier:

4. In the **Name** field, enter a unique name to help identify the numbering scheme. For example, enter a name related to the type of batch that will be used with this numbering scheme.
5. In the **Type** field, select how the batch number scheme will be created. Your choices include “Auto-generated” or “Manual.” If you select “Manual,” the options under Batch number are disabled and you can only specify the exception identifier.
6. Under **Batch number**, select whether to include a batch identifier and/or date in the automatically generated batch numbers. To include these elements mark the corresponding checkbox.
7. In the **Order** column, select the order in which each selected element appears in the batch number.
8. In the **Details** column, enter the default settings for each selected element.
 - a. In the **Next sequence** field, enter the first number to use when the program starts to create batches with the numbering scheme. You can also select a separator to use between the batch elements.
 - b. In the **Leading zeroes** field, select the number format for the batch number sequence. The program formats leading zeroes based on the number used in next sequence. For example, if next sequence is 99 and leading zero format is 0#, the batch number will be 100. The batch number is not restricted to two digits. The number of zeroes plus the # sign represent how many digits will show initially. If the next sequence number is not that many digits, leading zeroes are used. The leading zeroes format does not restrict the sequence to that many digits; it simply requires at least that many digits.
 - c. If you select to include a batch identifier in the batch number, in the **Batch identifier** field, enter the text to appear in batch numbers generated with the scheme. You can also select a separator to use between the batch elements.

- d. If you select to include the date the batch is created in the batch number, in the **Date** field, select the format in which to display the date, such as MM-DD-YY. You can also select a separator to use between the batch elements.
9. Under **Exception batches**, select the type of batch number to assign to exception batches generated when you commit batches.
- To use the selected numbering scheme to generate a new batch number for the exception batches, select **Use the next available batch number**.
 - To use the number assigned to the original batch with a sequential number to indicate its order in exception batches generated from the batch, select **Use the original batch number and append an exception sequence**. For example, if you select this option, the number of the second exception batch generated when you commit a batch would be the original batch number followed by “2.”
- To use a label to specify an exception batch, you can enter a number in the **Exception identifier** field. This will appear between the original batch number and the number of the exception batch.
- Keep in mind, the separator for the last field in the batch number applies to the exception batch number for the auto-generated numbering schemes.

Note: Before you save the numbering scheme, we recommend you verify the batch numbers are formatted correctly in the preview fields.

10. Click **Save**. You return to the Batch Numbering Schemes page. The new numbering scheme now displays in the **Batch numbering schemes** grid.

Add a Batch Numbering Scheme Screen

The table below explains the items on the Add a batch numbering scheme screen. For information about how to access this screen, see [Add Batch Numbering Schemes](#) on page 2.

Screen Item	Description
Name	Enter a unique name to help identify the numbering scheme. For example, enter a name related to the type of batch that will be used with this numbering scheme.
Type	Select how the batch numbering scheme will be created. Your choices include “Auto-generated” or “Manual.” If you select “Manual,” the options under Batch number are disabled and you can only specify the exception identifier. When you create an ‘Auto-generated’ numbering scheme, you can define batch identifier and/or date formats, and the order in which they appear. The program will assign batch numbers for new batches automatically.
Batch number	Select whether to include a batch identifier and/or date in the automatically generated batch numbers. To include these elements mark the corresponding checkbox.
Order	Select the order in which each selected element appears in the batch numbers.
Details	In the Details column, enter the default settings for each selected element. In the Next sequence field, enter the first number to use when the program starts to create batches with the numbering scheme. You can also select a separator to use between the batch elements. In the Leading zeroes field, select the number format for the batch number sequence. For example, if next sequence is 99 and leading zero format is 0#, the batch number will be 100. The batch number is not restricted to two digits. If you select to include a batch identifier in the batch number, in the Batch identifier field, enter the text to appear in batch numbers generated with the scheme. You can also select a separator to use between the elements. If you select to include the date the batch is created in the batch number, in the Date field, select the format in which to display the date, such as MM-DD-YY. You can also select a separator to use between the batch identifier.

Screen Item	Description
Exception batches	<p>Under Exception batches, select the type of batch number to assign to exception batches generated when you commit batches.</p> <p>To use the selected numbering scheme to generate a new batch number for the exception batches, select Use the next available batch number.</p> <p>To use the number assigned to the original batch with a sequential number to indicate its order in exception batches generated from the batch, select Use the original batch number and append an exception sequence. For example, if you select this option, the number of the second exception batch generated when you commit a batch would be the original batch number followed by "1."</p> <p>To define a marker to appear between the original batch number and the sequential number to indicate the batch is an exception batch, enter a number in the Exception identifier field.</p>

Edit a Batch Numbering Scheme

Once you add a batch numbering scheme to the database, you can edit its name or default settings. To edit a numbering scheme, select it in the **Batch numbering schemes** grid and click **Edit** on the action bar.

► Edit a batch numbering scheme

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch numbering schemes**. The Batch Numbering Schemes page appears.
3. Under **Batch numbering schemes**, select the numbering scheme and click **Edit**. The Edit batch numbering scheme screen appears. The items on this screen are the same as the Add batch numbering scheme screen. For information about the items on this screen, see *Add a Batch Numbering Scheme Screen* on page 4.
4. Edit the information as necessary.
5. Click **Save**. You return to the **Batch numbering schemes** grid.

Delete a Batch Numbering Scheme

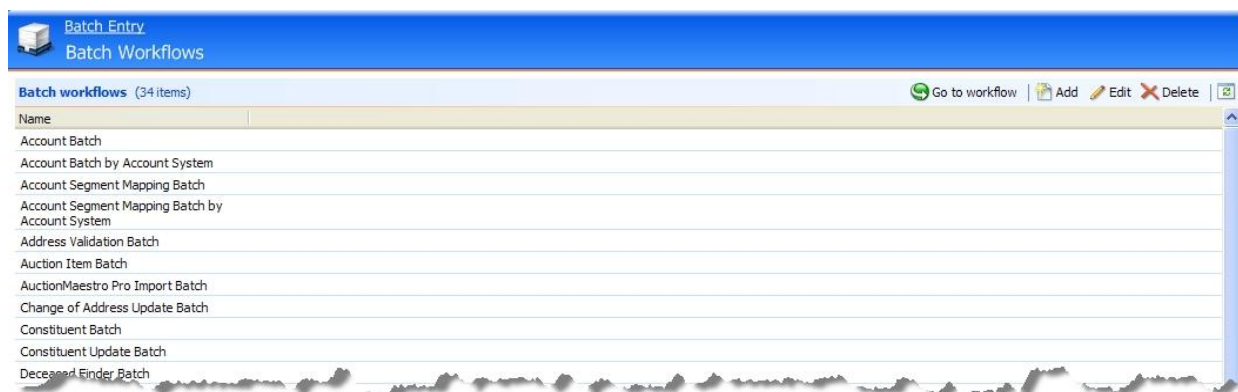
You can delete a batch numbering scheme that is currently not assigned to a batch template. You cannot delete a numbering scheme currently in use by a batch template.

► Delete a batch numbering scheme

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch numbering schemes**. The Batch Numbering Schemes page appears.
3. Under **Batch numbering schemes**, select a numbering scheme and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the **Batch numbering schemes** grid.

Configure Batch Workflows

On the Batch Workflows page, you can manage the batch workflows used to create batch templates. To access the Batch Workflows page from the Batch Entry page, click **Batch workflows** under **Configuration**.



The **Batch workflows** grid displays the batch workflows in your database. Once you create a batch workflow record, you then access the workflow record to specify the batch statuses included in the workflow and the steps available for each status.

You can perform many steps to manage the batch workflows in the database.

To update the information that appears in the grid, click **Refresh** on the action bar.

Add a Batch Workflow

The batch workflow determines the statuses the batch goes through before a user can commit its records to the database. When you add a batch workflow, you specify a name for the workflow record. On the batch workflow record, you can create the workflow statuses and steps. For information, see [Batch Workflow Record](#) on page 7.

► Add a batch workflow

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch workflows**. The Batch Workflows page appears.
3. On the action bar of the **Batch workflows** grid, click **Add**. The Add batch workflow screen appears.

4. Enter a unique name to help identify the batch workflow.
5. Click **Save**. The batch workflow record appears. On the batch workflow record, you can create the workflow statuses and steps. For information, see [Batch Workflow Record](#) on page 7.
6. Once you add all the statuses and steps of the workflow, review the workflow to make sure it is complete and moves a batch to committal correctly.

Edit a Batch Workflow

To edit the name of a batch workflow, select it on the **Batch workflows** grid and click **Edit** on the action bar.

For information about editing the statuses and steps associated with a workflow, see [Batch Workflow Record](#) on page 7.

► **Edit a batch workflow**

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch workflows**. The Batch Workflows page appears.
3. Under **Batch workflows**, select a workflow and click **Edit**. The Edit batch workflow screen appears. From this form, you can edit the name of the batch workflow record. For information about editing batch workflow statuses and workflow steps, see [Batch Workflow Record](#) on page 7.
4. Click **Save**. You return to the **Batch workflows** grid.

Delete a Batch Workflow

You can delete a batch workflow from the **Batch workflows** grid. For example, perhaps you want to clean up the your database, or you no longer use the batch workflow. You cannot delete a batch workflow until it is removed from use on a batch template.

Note: You cannot delete a batch workflow until it is removed from use on a batch template.

► **Delete a batch workflow**

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch workflows**. The Batch Workflows page appears.
3. Under **Batch workflows**, select a workflow and click **Delete**. A confirmation message appears.
4. Click **Yes**. You return to the **Batch workflows** grid.

Batch Workflow Record

From the batch workflow record, you can define and manage the status values of the batch workflow and the steps used to transition a batch from one status to another.

Each batch template in your database can have a unique workflow. For example, your organization may set up the workflow for a constituent batch so you can commit a batch directly from the data entry status. Likewise, your organization may require that the data entry of a batch be approved before committal. For information about how to create a batch workflow, see [Configure Batch Workflows](#) on page 5.

To access a batch workflow record, highlight the batch workflow on the Batch Workflows page and select **Go to workflow**.

Batch Workflows
Address Validation Batch

Step 1: Define status values used with the workflow Add Edit Delete

Name	Is initial status	Allow edit	Allow commit	Enforce total matching	Days before overdue
Open	✓	✓	✓		0

Step 2: Define the steps used to transition a batch from one status to another Edit

From status	Step name	To status
-------------	-----------	-----------

Note: To return to the Batch Workflows page, click **Batch Workflows** at the top of the record.

On the batch workflow record, the **Define status values used with the workflow** grid lists the batch status values associated with the workflow. For each status value listed, you can view whether it is the initial status of the workflow and whether users can commit or edit the data of a batch in that status. For more information about workflow statuses, see [Add a Batch Workflow Status](#) on page 8.

The **Define the steps used to transition a batch from on status to another** grid displays which steps are used to transition a batch from one status to another. For more information, see [Add a Batch Workflow Step](#) on page 12.

To update the information that appears in the grid, click **Refresh** on the action bar.

Add a Batch Workflow Status

The batch workflow defines the basic process of the batch. When you add a batch workflow, you must add status values to determine the process a batch must complete before its records commit to the database.

► Add a batch workflow status

1. On the batch workflow record, click **Add** on the action bar of the **Define status values used with the workflow** grid. The Add a workflow status screen appears. For information about the items on this screen, see [Add a Batch Workflow Status Screen](#) on page 10.

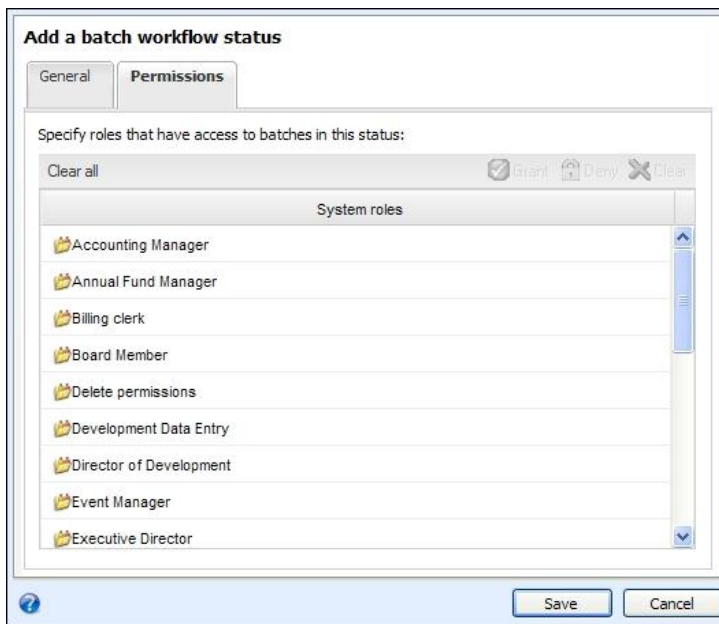
Note: You can also access the Add a workflow status screen within the **From status** and **To status** fields on the Edit workflow steps screen.

The screenshot shows a dialog box titled "Add a batch workflow status". It has two tabs: "General" (selected) and "Permissions". In the "General" tab, there is a "Name:" label followed by a text input field. Below this are four checkboxes: "This is the initial status for the workflow" (unchecked), "Allow batch to be edited in this status" (checked), "Allow batch to be committed when in this status" (unchecked), and "Only allow commit when projected totals match batch totals" (unchecked). Below the checkboxes is a label "Days allowed before batch is overdue:" followed by a text input field containing the value "0". At the bottom right of the dialog are "Save" and "Cancel" buttons.

2. On the General tab, enter a unique name to help identify the batch workflow status.
3. Select how to handle a batch in this status and whether this status is the first status in the workflow.
 - To have this status be the first status of a batch in the workflow, mark **This is the initial status for the workflow**. You can mark this checkbox for only one status in the workflow. If you mark this checkbox and another status in the workflow is already specified as the initial status, the program automatically unmarks **This is the initial status for the workflow** for that status.

Note: To use a workflow on a batch template, the workflow must contain a status that is marked as initial status.

- To enable users to edit a batch in this status, mark **Allow batch to be edited in this status**. When this checkbox is marked, users can edit the data entry of the batch.
 - To enable users to commit the records of a batch in this status to the database, mark **Allow batch to be committed when in this status**. Depending on the workflow, you can enable a batch to be committed from multiple statuses. If you mark this checkbox, the **Only allow commit when projected totals match batch totals** checkbox is enabled. Mark this checkbox to ensure projected totals and batch totals match before committing the batch.
 - In the **Days allowed before batch is overdue** field, enter how many days the batch can be in this status before it is overdue. The maximum days you can enter is 255. If you set this field to be greater than zero for a workflow status, an exclamation point appears in the **Batch number** column for any batches on the Uncommitted Batches tab that have been in the status longer than the specified number of days. To not set a time limit on the workflow status, leave the default setting of "0."
4. Select the Permissions tab. On this tab, you specify roles that have access to batches in this status.



5. The **System roles** box displays all roles eligible to access batches in this status. For each system role, specify access rights as necessary.
 - To enable users in a specific system role to access batches in this status, select the role in the **System roles** box and click **Grant** on the action bar. A green checkmark appears next to the system role you selected.
 - To prevent users in a specific system role from accessing batches in this status, select the role in the **System roles** box and click **Deny** on the action bar. A lock icon appears next to the system role you selected. If a user has multiple system roles and one of those roles is denied access rights, he or she cannot access the batch, even if another of his or her system roles is granted rights.
 - To not grant a user in a specific system role access rights but also not prevent the user from accessing batches in this status, such as for a user with multiple system roles, you can choose to neither grant nor deny the system role access rights to batches in this status. To remove the GRANTED or DENIED status assigned to a system role, select the role in the **System roles** box and click **Clear** on the action bar. If left clear, and the user does not have system administrator rights, he cannot access the status.
 - To remove all GRANTED and DENIED statuses assigned to the system roles, click **Clear all** on the action bar.
6. Click **Save**. You return to the batch workflow record. The new workflow status appears in the **Define status values used with the workflow** grid.

Add a Batch Workflow Status Screen

The table below explains the items on the Add a batch workflow status screen. For information about how to access this screen, see [Add a Batch Workflow Status](#) on page 8.

Screen Item	Description
Name	On the General tab, enter a name to help identify the batch workflow status. You can enter up to 100 characters in this field. The Name of each status in a batch workflow must be unique.

Screen Item	Description
This is the initial status for the workflow	If the status is the first status for a batch in the workflow, mark this checkbox. When this checkbox is marked, a newly created batch starts with this status. You can specify only one status as the initial status of the workflow. If you mark this checkbox and another status in the workflow is already specified as the initial status, the program automatically unmarks this checkbox for that status.
Allow batch to be edited in this status	To enable a user to edit the data entry of a batch in this status, mark this checkbox. When this checkbox is marked, the user can edit the properties or data of a batch in this status.
Allow batch to be committed when in this status	To enable a user to commit the records of a batch in this status to the database, mark this checkbox. Depending on the workflow, you can enable users to commit a batch from multiple status. If you mark this checkbox, the Only allow commit when projected totals match batch totals checkbox is enabled. Mark this checkbox to ensure projected totals and batch totals match before committing the batch.
Days allowed before batch is overdue	Enter how many days the batch can be in the workflow status before it is overdue. The maximum days you can enter is 255. If you set a time limit for a workflow status, an exclamation point icon appears in the Batch number column for any overdue batches on the Uncommitted Batches tab of the Batch Entry page. To not set a time limit on the workflow status, leave the default setting of "0."
System role	On the Permissions tab, this box displays all roles eligible to access batches in the status. For each system role, specify the access rights as necessary. To enable users in a specific system role to access a batch in the status, select the role and click Grant on the action bar. To prevent users in a specific system role from accessing a batch in the status, select the role and click Deny on the action bar. If a user has multiple system roles and one of those roles is denied access rights to a batch in the status, he or she cannot access the batch, even if another of his or her system roles is granted rights. To not grant a user in a specific system role access right but also not prevent the user from accessing batches in the status, you can select to neither grant nor deny the role access rights. This is useful if you have users with multiple system roles. To remove a "GRANTED" or "DENIED" status from a system role, select the role and click Clear on the action bar. To remove all "GRANTED" and "DENIED" statuses assigned to system roles, click Clear all on the action bar.

Edit a Batch Workflow Status

Once you add a status to a batch workflow, you can adjust its information and settings. For example, you can edit the status name or adjust how users can handle a batch in the status.

Depending on the workflow, you can also enable a batch to be committed from multiple statuses.

To edit a batch workflow status, select it in the **Define status values used with the workflow** grid on the batch workflow record and click **Edit** on the action bar.

► Edit a batch workflow status

1. On the batch workflow record, select the status to edit in the **Define status values used with the workflow** grid.
2. On the action bar, click **Edit**. The Edit batch workflow status screen appears. The items on this screen are the same as the Add a batch workflow status screen. For information about the items on this screen, see Add a Batch Workflow Status Screen on page 10.
3. Update the information as necessary.
4. Click **Save**. You return to the batch workflow record.

Delete a Batch Workflow Status

You can delete a batch workflow status only when it has no associated steps, and there are no existing batches in the status you are trying to delete.

► Delete a batch workflow status

1. On the batch workflow record, select the status to delete in the **Define status values used with the workflow** grid.
2. On the action bar, click **Delete**. A message appears to confirm the deletion of the workflow status.

Note: You must delete all steps associated with the workflow status before you can delete it.

3. Click **Yes**. You return to the batch workflow record.

Add a Batch Workflow Step

Once you define a workflow status, you can then specify the steps the user can perform with a batch in that status. The step you select determines the next status in the batch workflow.

For example:

From status: "Open" **Step name:** "Submit for Review" **To status:** "Submitted"

From status: "Submitted" **Step name:** "Approve" **To status:** "Approved"

From status: "Submitted" **Step name:** "Reject" **To status:** "Open"

You add batch workflow step from the **Define the steps used to transition a batch from one status to another** grid on the workflow record.

► Add a batch workflow step

1. On the batch workflow record, click **Edit** on the action bar of the **Define the steps used to transition a batch from one status to another** grid. The Edit batch workflow steps screen appears.

From status	Step name	To status
<div> <div></div> <div></div> <div></div> </div>		

2. In the **From status** field, select the status from which the batch moves when the user performs the step. To add a new workflow status, click the **New** button in the field.
3. In the **Step name** field, enter a unique name to help identify the workflow step.
4. In the **To status** field, select the status to which the batch moves when the user performs the step.

5. Click **Save**. You return to the batch workflow record.

Edit a Batch Workflow Step

Once you add a step to a batch workflow, you can adjust its information and settings. For example, you can edit the step name, or select a different status to follow the step.

To edit a workflow step, click **Edit** on the **Define the steps used to transition a batch from one status to another** grid.

► Edit a workflow step

1. On the batch workflow record, click **Edit** on the action bar of the **Define the steps used to transition a batch from one status to another** grid. The Edit workflow steps screen appears. For information about the items on this screen, see [Edit Batch Workflow Steps Screen](#) on page 13.
2. Update the information as necessary.
3. Click **Save**. You return to the batch workflow record.

Edit Batch Workflow Steps Screen

The table below explains the items on the Edit workflow steps screen. For information about how to access this screen, see [Add a Batch Workflow Step](#) on page 12.

Screen Item	Description
From status	Select the status from which the batch moves when the user performs the step. To add a new workflow status, click the New button in this field. The Add a batch workflow status screen appears. For information about the items on this screen, see Add a Batch Workflow Status Screen on page 10.
Step name	Enter a unique name to help identify the workflow step.
To status	Select the status to which the batch moves when the user performs the step. To add a new workflow status, click the New button in this field. The Add a batch workflow status screen appears. For information about the items on this screen, see Add a Batch Workflow Status Screen on page 10.

Delete a Batch Workflow Step

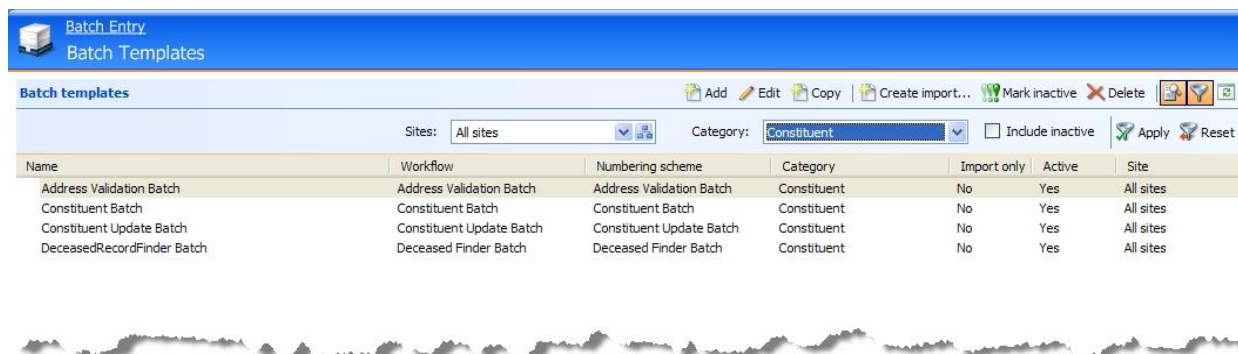
You can delete workflow steps at any time. To delete a workflow step, select **Edit** on the action bar of the **Define the steps used to transition a batch from one status to another** grid.

► Delete a workflow step

1. On the batch workflow record, select **Edit** on the action bar of the **Define the steps used to transition a batch from one status to another** grid. The Edit workflow steps screen appears. For information about the items on this screen, see [Edit Batch Workflow Steps Screen](#) on page 13.
2. Select the step to delete by highlighting the row of the step and pressing **DELETE** on your keyboard.
3. Click **Save**. You return to the batch workflow record.

Configure Batch Templates

On the Batch Templates page, you can manage the batch templates used to create batches. To access the Batch Templates page from the Batch Entry page, click **Batch templates** under **Configuration**.



The **Batch templates** grid displays your batch templates. To limit the batch templates that appear in the grid to those of a specific type of data, click **Filter** on the action bar. The **Category** field appears. In the **Category** field, select the category by which to filter the templates and click **Apply**. For example, if you manage multiple batch types and want to view only templates for constituent batches, select “Constituent” and click **Apply**. You can also select whether to include inactive batch templates in the grid. To update the information that appears in the grid, click **Refresh** on the action bar.

To help you work with *Batch entry*, the program provides some basic batch templates. These batch templates provide the basic fields necessary to add information to create records such as for constituents and revenue transactions. For information about the fields included in these batch templates, see Default Basic Batch Templates on page 33.

When you create a batch template, you select the batch type, numbering scheme, and workflow and specify any additional fields and defaults to use in the batch’s records. From the grid, you can perform many tasks to manage your batch templates.

Note: To add an import process from *Batch entry*, on the Batch Templates page, select the template on which to base the import and click **Create import** on the action bar.

Add a Batch Template

Before you can add a batch to the database, you must create the batch template. The batch template defines basic information about the batch, such as the fields included in the batch and default values for the fields. The Batch Templates page lists the batch templates currently in the database.

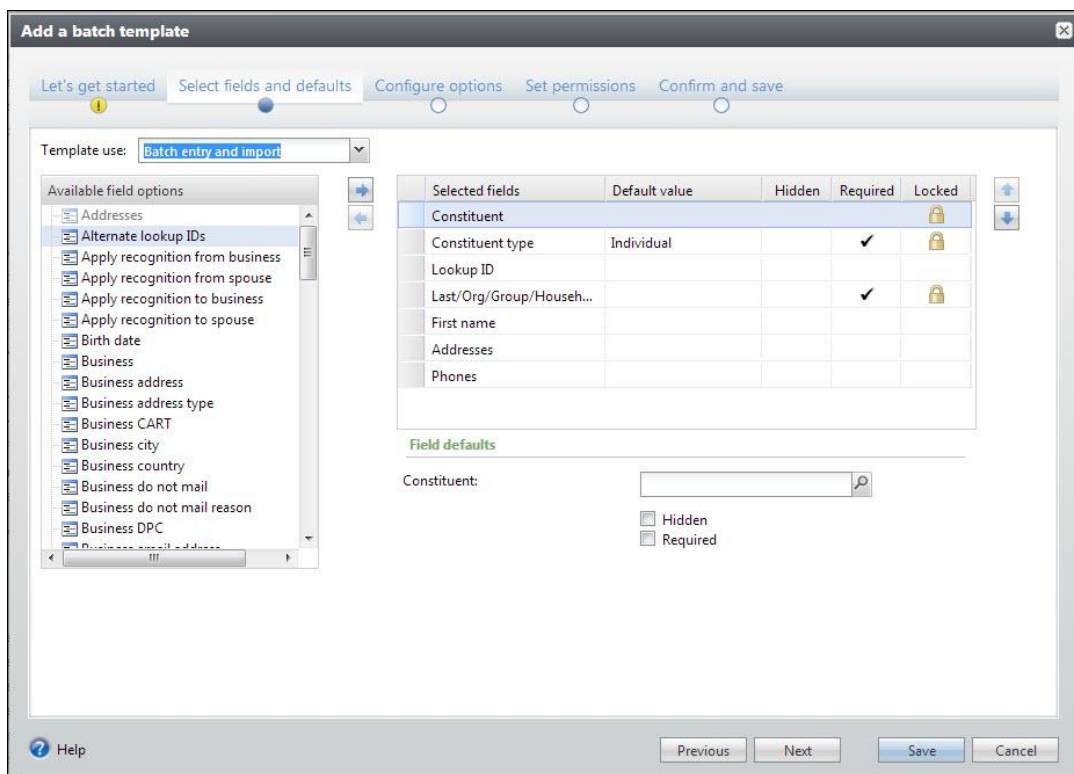
To add a batch template, select **Add** on the action bar of the Batch Templates page. The Add a batch template screen is a series of forms designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears.

► Add a new batch template

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.

3. On the action bar of the **Batch templates** grid, click **Add**. The Select a batch type screen appears.
4. Select the type of batch for which you want to create a template. A batch type defines the fields available for a batch template.
5. Click **OK**. The Add a batch template screen appears.

6. Under Let's get started, in the **Batch template name** and **Description** fields, enter a unique name and description to help you identify the batch template.
7. In the **Workflow name** field, select the workflow to use with this template. This field displays all workflows in your database that have a status designated as an initial state. If the workflow you want does not appear in the drop-down list, you can add the workflow to the database. For more information about batch workflows, see [Configure Batch Workflows on page 5](#).
8. In the **Numbering scheme** field, select the numbering scheme to use with this template. To add a new numbering scheme from this field, select the New numbering scheme icon. If you use a global numbering scheme, the **Numbering scheme** field displays the name of the global scheme and is disabled. For more information about numbering schemes, see [Configure Batch Numbering Schemes on page 1](#).
9. Mark **Enable auto-save** if you want the batch to automatically save each row as you work.
10. In the **Site** field, select the site you want to associate with this batch template.
11. Click **Next**.



12. Under **Select fields and defaults**, in the **Template use** field, you can specify how the template will be used. This field is enabled only with certain batch types.
 - Select “Batch entry and import” to make the template available for both importing and batch entry.
 - Select “Batch entry only” to make the template available only for batch entry.
 - Select “Import only” to make the template available only for importing. If you select this option, the template will not be available for selection when creating a new batch.
13. In the **Available field options** box, a list of all the fields available to use in the batch template appears. The selected batch type determines which fields appear in this box. When a + symbol appears next to an entry in the **Available field options** box, you can click the + symbol to view a list of field names grouped under the heading.

In the **Selected fields** box, fields required by the selected batch type are marked **Required**. Any fields that cannot be removed from the **Selected fields** box are marked **Locked**. Add any additional fields to include in the batch template. To move fields to the **Selected fields** box, select them in the **Available field options** box and click the right arrow. You can select multiple fields and move groups, as well as move entire folders. When a field appears in the **Selected fields** box, it is disabled in the **Available field options** box.

Note: To move fields to the **Selected fields** box, you can also drag and drop them from one box to another.

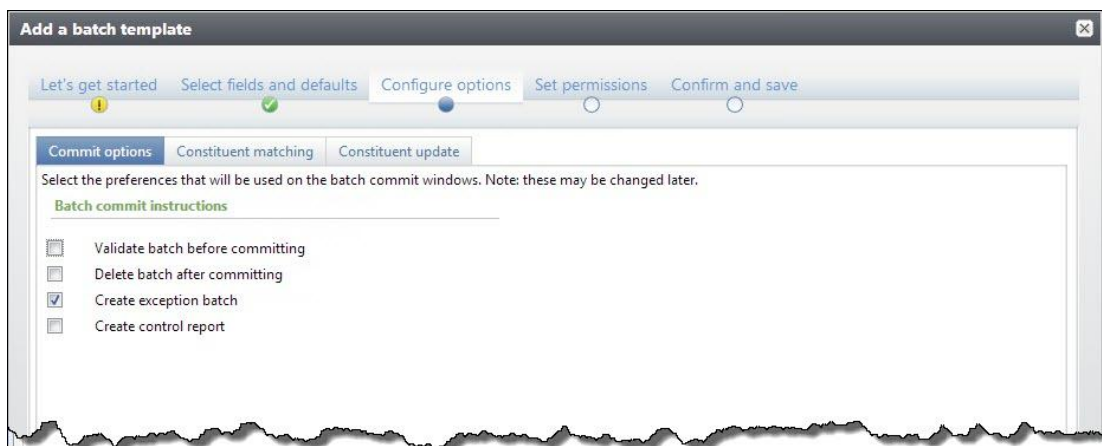
Note: When you design a constituent batch, you can select to add the **Constituent security attribute** field. When you add this field and select a security group as a field default or during batch data entry, only users in the selected security group can manage constituent records created during batch committal.

Note: When creating an Event Registrant template, if you select a status of “Registered (will not attend),” the application automatically sets the Attended field to “No.”

14. The order of the fields in the **Selected fields** box is the order the fields appear in the batch. Once you select all the fields to use in the batch, use the up and down arrows to arrange their order. You can also drag the fields up and down to arrange their order.
15. Under **Default value**, set the default setting for the fields or checkboxes in the **Selected fields** box as necessary.
 - a. To set a default setting for a field, select it in the **Selected fields** box and, under **Default value**, enter its default value.
 - b. To mark a checkbox in the **Selected fields** box by default, select it in the **Selected fields** box and, under **Default value**, and mark its checkbox. When you enter data into the batch, the selected checkbox is automatically marked. For example, if you include the **Do not send mail to this address** checkbox in a constituent batch and want it automatically marked in the batch, select it in the **Selected fields** box and mark its checkbox under **Default value**.
 - c. When you set a default value for an item in the **Selected fields** box and do not expect its value to change for any record entered in the batch, you can hide the field. When you hide a field or checkbox, it does not appear in the batch for data entry. Records added to the batch automatically include the default value. To hide a field or checkbox, select it in the **Selected fields** box and mark **Hidden** under **Default value**.
 - d. To make a field or checkbox required in the batch, select it in the **Selected fields** box and mark **Required** under **Default value**.

Note: Some fields are automatically marked as **Required**, as specified by the selected batch type. When the batch type requires a field, you cannot unmark the **Required** checkbox for the field.

16. Click **Next**.



17. Under **Configure options**, on the **Commit options** tab, select which actions the program should complete when it commits the batch.
 - To validate the batch before you commit it to the database, mark **Validate batch before committing**.

Note: When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist.

- To delete the batch after you commit it to the database, mark **Delete batch after committing**. If you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.
- To create a batch of all records that do not commit to the database, mark **Create exception batch**.
- To generate a control report after you commit the batch to the database, mark **Create control report**. The control report describes the committed batch and provides information about the records included in the batch.

Note: Constituent matching is available for only these batch types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor.

18. Under **Configure options**, on the **Constituent matching** tab, you can use matching settings to identify records in the batch that may already exist as constituents in your database. When you select **Use global settings**, the percentages default from the global settings defined on the Constituent matching settings page in *Administration*. If you select this option, matching settings on the template are updated automatically any time you update matching settings in *Administration*.

To change the default settings, clear **Use global settings** and select **Check for records that match existing constituents**. The thresholds defined on this screen apply to all batches produced from this batch template.

- Edit the percentage range for the **Matched constituents** threshold. Batch records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import.

Note: For Constituent Update and Enhanced Revenue batches, the program may update the existing constituent with information from the incoming constituent according to your organization's selected constituent update rules. For more information about update rules, see Constituent Updates on page 24. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.

- Edit the percentage range for the **Possible matches** threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require

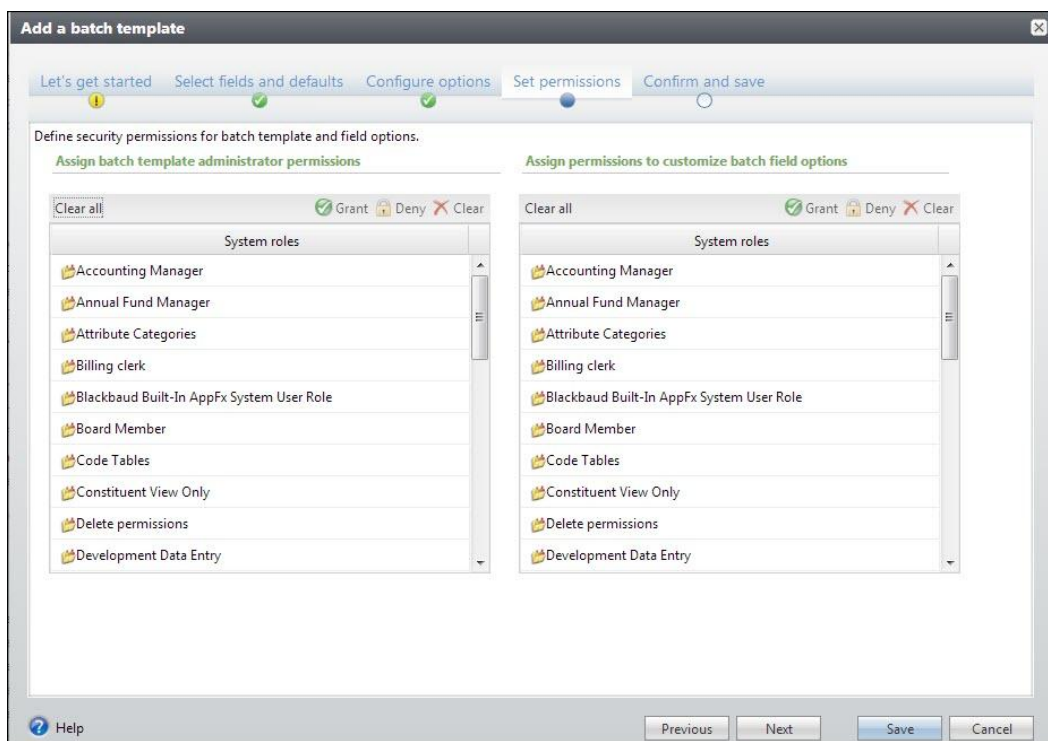
manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.

For more information about how to compare records on the duplicate resolution screen, see [Resolve Duplicate Constituents in a Batch](#) on page 74.

- c. The percentage range for the **No match** threshold is based on your settings for the upper thresholds. Batch records with match scores in this range probably do not match an existing record. The action that occurs depends on the batch type. For Constituent Update batches, the program creates a new record. For Revenue, Enhanced Revenue, or Revenue Update batches, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.

Note: **Constituent updates** is available for only Constituent Update and Enhanced Revenue batch templates.

19. Select the Constituent updates tab.
20. You can use constituent update rules to manage how the program resolves conflicting data on matched constituents in a batch. When you select **Use batch template settings**, the rules default from the batch template selected for the import. To change the rules used for this import process, clear **Use batch template settings** and then select other rules. The rules defined on this tab apply to all batches produced from this import process. For more information about options on the Constituent updates tab, see [Constituent Updates Tab](#) on page 167
21. Click **Next**.



22. Under **Set permissions**, in the **System roles** box on the left, you can assign permissions to edit this batch template.

- To enable users in a specific system role to edit the batch template, select the system role and click **Grant** on the action bar. The status of the selected system role changes to GRANTED.
- To prevent users in a specific system role from administering the batch template, select the system role and click **Deny** on the action bar. The status of the selected system role changes to DENIED. If a user has multiple system roles and one of those roles is denied access rights, he or she cannot administer the batch template, even if another of his or her system roles is granted rights.
- To not grant a user in a specific system role access rights but also not prevent the user from administering the batch template, such as for a user with multiple system roles, you can choose to neither grant nor deny the system role administrator rights to the batch template. To remove the GRANTED or DENIED status assigned to a system role, select the role and click **Clear** on the action bar.
- To remove all GRANTED and DENIED statuses assigned to the system roles, click **Clear all** on the action bar.

23. In the **System roles** box on the right, you can assign permissions to customize fields within a batch.

- To enable users in a specific system role to customize the fields within a batch, select the system role and click **Grant** on the action bar. The status of the selected system role changes to GRANTED.
- To prevent users in a specific system role from customizing the batch template, select the role in the **System role** box and click **Deny** on the action bar. The status of the selected system role changes to DENIED. If a user has multiple system roles and one of those roles is denied access rights, he or she cannot customize the batch template, even if another of his or her system roles is granted rights.
- To not grant a user in a specific system role access rights but also not prevent the user from customizing the batch template, such as for a user with multiple system roles, you can choose to neither grant nor deny the system role rights to customize the batch template. To remove the GRANTED or DENIED status assigned to a system role, select the role in the **System role** box and click **Clear** on the action bar.
- To remove all GRANTED and DENIED statuses assigned to the system roles, click **Clear all** on the action bar.

24. Click **Next**.

25. Under **Confirm and save**, review the batch template information to ensure the fields and options you selected are accurate.
26. Click **Save** to save the template and return to the Batch Templates page.

Add a Batch Template Forms

The tables below explain the items on the Add a batch template screens. When you add a batch template, you enter information on a series of forms as you move through the process. Each form is described below. For information about how to access these forms, see [Add a Batch Template](#) on page 14.

Let's Get Started

Let's get started is one of a series of forms on the Add a batch template screen. These forms are designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears. To add a batch template, select **Add** on the action bar of the Batch Templates page. From here, you can access **Let's get started**.

Screen Item	Description
Batch template name	Enter a unique name to help you identify the batch template.
Description	Enter a unique description to help you identify the batch template.
Workflow name	Select the workflow to use with this template. This field displays all workflows in your database that have a status designated as an initial state. If the workflow you want does not appear in the list, you can add the workflow to the database. For more information about batch workflows, see Configure Batch Workflows on page 5.
Numbering scheme	Select the numbering scheme to use with this template. For more information about numbering schemes, see Configure Batch Numbering Schemes on page 1.

Screen Item	Description
Enable auto-save	Mark this checkbox if you want the batch to automatically save each row as you work.

Select Fields and Defaults

Select fields and defaults is one of a series of forms on the Add a batch template screen. These forms are designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears. To add a batch template, select **Add** on the action bar of the Batch Templates page. From here, you can access **Select fields and defaults**.

Screen Item	Description
Select a batch type	Select the type of batch for which you want to create a template. A batch type defines the fields available for a batch template.
Template use	Specify how the template can be used. This field is enabled only with certain batch types. Select "Batch entry and import" to make the template available for both importing and batch entry. Select "Batch entry only" to make the template available only for batch entry. Select "Import only" to make the template available only for importing. If you select this option, the template will not be available for selection when creating a new batch.
Available field options	In the Available field options box, a list of all the fields available to use in the batch template appears. The selected batch type determines which fields appear in this box. To move a single field to the Selected fields box, select it in the Available field options box and click the right arrow. When a field appears in the Selected fields box, it is disabled in the Available field options box. You can also click and drag fields from one box to the other.
Selected fields	The order of the fields in the Selected fields box is the order the fields appear in the batch. Once you select all the fields to use in the batch, use the up and down arrows to arrange their order.
Default value	Under Default value , set the default setting for the fields or checkboxes in the Selected fields box as necessary. To set a default setting for a field, select it in the Selected fields box and, under Default value , enter its default value. To mark a checkbox in the Selected fields box by default, select it in the Selected fields box and, under Default value , and mark its checkbox. When you enter data into the batch, the selected checkbox is automatically marked. When you set a default value for an item in the Selected fields box and do not expect its value to change for any record entered in the batch, you can hide the field. When you hide a field or checkbox, it does not appear in the batch for data entry. Records added to the batch automatically include the default value. To hide a field or checkbox, select it in the Selected fields box and mark Hidden under Default value . To make a field or checkbox required in the batch, select it in the Selected fields box and mark Required under Default value .

Configure Options

Configure options is one of a series of forms on the Add a batch template screen. These forms are designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form you are currently working on. If you have not entered required information on a form, a yellow warning appears. To add a batch template, click **Add** on the Batch Templates page. From here, you can access **Configure options**.

The Configure Options form includes a series of tabs with options for formatting data in the batch.

Commit Options

On the **Commit options** tab under **Configure options**, you can specify which actions the program should complete when it commits the batch.

Screen Item	Description
Validate batch before committing	Select this checkbox to validate the batch before you commit it to the database. When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist.
Delete batch after committing	Select this checkbox to delete the batch after you commit it to the database. If you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.
Create exception batch	Select this checkbox to create a batch of all records that do not commit to the database.
Create control report	Select this checkbox to generate a control report after you commit the batch to the database. The control report describes the committed batch and provides information about the records included in the batch.

Constituent Matching

Note: Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

On the Constituent matching tab under **Configure options**, use the threshold settings to define three percentage ranges or "thresholds" for match confidences that determine when incoming records are matches, possible matches, or not matches based on their match scores. **Match confidence** compares field values from the new record with existing records and assigns match scores for fields weighted by field type. Match confidence is calculated based on the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about how match confidence scores are calculated, see the *Administration Guide*.

Note: The Constituent matching tab is available for these batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor.

The program performs different actions for each threshold as described in this table:

Screen Item	Description
Use global settings	When you select Use global settings , matching thresholds default from the Constituent Matching Settings page in <i>Administration</i> . If you update the matching settings in <i>Administration</i> , the program updates the settings on this batch template accordingly.
Check for records that match existing constituents	To set different matching settings for a batch template, clear Use global settings , select Check for records that match existing constituents , and then adjust the thresholds.
Process automatically	Edit the percentage range for the Matched constituents threshold. Batch records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the batch. This process occurs behind the scenes and requires no actions from users.

Screen Item	Description
	<p>Note: For Constituent Update and Enhanced Revenue batches, the program may update the existing constituent with information from the incoming constituent according to your organization's selected constituent update rules. For more information about update rules, see <i>Constituent Updates</i> on page 24. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.</p> <p>You can clear Process automatically to turn off automatic updates.</p>
Review matches	<p>Edit the percentage range for the Possible matches threshold. Batch records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.</p> <p>For more information about how to compare records on the duplicate resolution screen, see <i>Resolve Duplicate Constituents in a Batch</i> on page 74.</p> <p>You can clear Review matches to turn off manual reviews.</p>
Create new record	<p>The percentage range for the Create new record threshold is based on your settings for the upper thresholds. Batch records with match scores in this range probably do not match an existing record.</p> <p>The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For revenue, enhanced revenue, or revenue update imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.</p>

Constituent Updates

The table below explains the items on the Constituent updates tab under **Configure options**.

For detailed information about how the program uses constituent update rules to resolve conflicts, see the *Administration Guide*.

Note: The Constituent updates tab is available for only Constituent Update and Enhanced Revenue batch templates.

The program performs handles data updates according to the rules you specify on this tab:

Screen Item	Description
Use global settings	<p>When you select Use global settings, constituent update rules default from Global data entry settings page in <i>Administration</i>. If you update constituent update rules in <i>Administration</i>, the program updates the settings on this batch template accordingly.</p> <p>To set different constituent update rules for an import process, clear Use global settings and use the options below.</p>
Name updates	<p>Under Name updates, for the If name is different from existing name setting, select one of these options:</p> <ul style="list-style-type: none"> • Update name—Select this option to replace the name on the existing constituent with the name from the incoming constituent. • Add name as an alias—Select this option to add the name from the incoming

Screen Item	Description
	<p>constituent as an alias to the existing constituent rather than replace an existing name. For example, if the incoming first name is "David" and the existing first name is "Dave," the program adds David an alias and leaves "Dave" as the first name.</p> <ul style="list-style-type: none"> • Ignore name—Select this option to never update the name on the existing constituent. For example, if the incoming first name is "David" and the existing first name is "Dave," the program leaves the first name as "Dave." • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting names on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for names but Update existing address for addresses, the program does not automatically update the address fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the address from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming name. <p>For the Retain existing name for historical reference setting, to store the existing name on the constituent record under Historical names, select Yes. This occurs when the batch is committed. To discard the existing name, select No.</p> <p>Note: Need a visual? View the name update flowchart.</p>
Address updates	<p>Under Address updates, for the If incoming address is similar to an existing address setting, select one of these options:</p> <p>Note: "Similar" means the incoming address (Street number, Street name, and Zip code) is very close to an existing address, but there are differences in one or more of the address fields. To find similar addresses, the program compares the incoming address to each address on the existing constituent (home, business, etc.) and applies the address portion of the matching algorithm to calculate how similar the addresses are. When a pair of addresses score 86 or higher, they are considered similar. For example, if the existing street address is 1955 Main St. 29402 and the incoming is 1956 Main St. 29402, their address matching score is 92, so the program applies the rule selected for the If address is similar to an existing address setting. If the incoming address is similar to multiple existing addresses, the program applies the rule to the existing address with the highest address matching score. If no existing addresses are found that are similar to an incoming address, the program applies the rule selected for the If address is NOT similar to any existing address setting.</p> <ul style="list-style-type: none"> • Update existing address (old address will not be retained) — Select this option to replace the address on the existing constituent with the address from the incoming constituent. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the address ID (generally only used in vendor files), the address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the address ID, the program applies the selected constituent update rule to the address.</p> <ul style="list-style-type: none"> • Add as new address — Select this option to add the incoming address as an additional

Screen Item	Description
	<p>address rather than update the existing address.</p> <ul style="list-style-type: none"> • Ignore address — Select this option to never overwrite the address on the existing constituent. The program discards the incoming address. • Require manual review (generate exception)— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the address. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for addresses but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming address. <p>For the If address is NOT similar to any existing address setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new address — Select this option to add the incoming address as a new address to the existing constituent. • Ignore address — Select this option to never add the incoming address to the existing constituent. • Require manual review (generate exception)— Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically add the address. <p>Under When you add an incoming address as new, you can select additional options for the new addresses. These options also apply to new addresses entered on the duplicate resolution screen.</p> <p>For the If new address had the same type as any existing address setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing address inactive — Select this option to make inactive any existing addresses with the same address type as the new address. The program updates the End date field on the constituent for all existing addresses with that address type. <p>Note: If the new and existing addresses are similar and neither has an address type assigned, the program does not make the existing address inactive. If the new address is not similar to any existing addresses and it does not have an address type assigned, any existing addresses that do not have an address type assigned remain active.</p> <ul style="list-style-type: none"> • Keep the existing address active— Select this option to keep the existing address active and add the incoming address as an additional address with the same address type. <p>For the Make new address primary setting, select one of these options:</p> <p>Note: If the existing constituent has no addresses, the primary address in the batch is always primary regardless of the option selected for Make new address primary.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new address primary. If a constituent has more than one new address in the batch, the one marked primary is made primary.

Screen Item	Description
	<p>If none of the new addresses is marked primary, the one that appears first in the batch is made primary.</p> <ul style="list-style-type: none"> • Only if the current primary address has the same address type — Select this option to make the new address primary only if it has the same address type as the existing primary address. If there are multiple new addresses in the batch and one has the same address type as the existing primary address, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and one of those new addresses is marked primary, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and none of those new addresses is marked primary, the one that appears first in the batch is made primary. • Never —Select this option to never make the new address primary. <p>Note: Need a visual? View the address update flowchart.</p>
Phone number updates	<p>Under Phone number updates, for the If incoming phone is not identical to any existing phone setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new phone — Select this option to add the incoming phone number as a new number. • Ignore phone — Select this option to never add the incoming phone number to the existing constituent. • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting phone numbers on the duplicate resolution screen even if the match confidence score is high enough to automatically update the phone number. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for phone numbers but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming phone number. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the phone ID (generally only used in vendor files), the phone number is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the phone ID, the program applies the selected constituent update rule to the phone number.</p> <p>Under When you add an incoming phone as new, you can select additional options for the new phone numbers. These options also apply to new phone numbers entered on the duplicate resolution screen.</p> <p>For the If new phone has the same type as any existing phone setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing phone inactive — Select this option to make inactive any existing phone numbers with the same phone type as the new phone number. The program updates the End date field on all existing phone numbers on the constituent with that phone

Screen Item	Description
	<p>type.</p> <ul style="list-style-type: none"> • Keep existing phone active— Select this option to keep the existing phone number active and add the incoming phone number as an additional phone number with the same phone type. <p>For the Make new phone primary setting, select one of these options:</p> <p>Note: If the existing constituent has no phone numbers, the primary phone number in the batch is always primary regardless of the option selected for the Make new phone primary setting.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new phone number primary. If a constituent has more than one new phone number in the batch, the one marked primary is made primary. If none of the new phone numbers is marked primary, the number that appears first in the batch is made primary. • Only if the current primary phone has the same phone type — Select this option to make the new phone number primary only if it has the same phone type as the existing primary phone number. If there are multiple new phone numbers in the batch and one has the same phone type as the existing primary phone number, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and one of those new phone numbers is marked primary, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and none of those new phone numbers is marked primary, the one that appears first in the batch is made primary. • Never —Select this option to never make the new phone number primary. <p>Note: Need a visual? View the phone number update flowchart.</p>
Email address updates	<p>Under Email address updates, for the If incoming email address is not identical to any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new email address — Select this option to add the incoming email address as an new email address. • Ignore email address — Select this option to never add the incoming email address to the constituent. • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting email addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for email addresses but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming email address. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the email ID (generally only used in vendor files), the email address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the email</p>

Screen Item	Description
	<p>ID, the program applies the selected constituent update rule to the email address.</p> <p>Under When you add an incoming email address as new, you can select additional options for the new email addresses. These options also apply to new email addresses entered on the duplicate resolution screen.</p> <p>For the If new email address has the same type as any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing email address inactive — Select this option to make inactive any existing email addresses with the same email type as the new address. The program updates the End date field on all existing email addresses on the constituent with that email type. • Keep existing email address active— Select this option to keep the existing email address active and add the incoming email as an additional email address with the same email type. <p>For the Make new email address primary setting, select one of these options:</p> <p>Note: If the existing constituent has no email addresses, the primary email address in the batch is always primary regardless of the option selected for Make new email address primary.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new email address primary. If a constituent has more than one new email address in the batch, the email marked primary is made primary. If none of the new email addresses is marked primary, the email that appears first in the batch is made primary. • Only if the current primary email address has the same email type — Select this option to make the new email address primary only if it has the same email type as the existing primary email address. If there are multiple new email addresses in the batch and one has the same email type as the existing primary email address, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and one of those new email addresses is marked primary, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and none of those new email addresses is marked primary, the email that appears first in the batch is made primary. • Never —Select this option to never make the new email address primary. <p>Note: Need a visual? View the email address update flowchart.</p>

Set Permissions

The **Set permissions** is one of a series of forms on the Add a batch template screen. These forms are designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears. To add a batch template, select **Add** on the action bar of the Batch Templates page. From here, you can access the **Set permissions**.

Screen Item	Description
Assign permissions to edit this batch	<p>In the System roles box on the left, you can assign permissions to edit this batch template.</p> <p>To enable users in a specific system role to edit the batch template, select the system</p>

Screen Item	Description
template	<p>role and click Grant on the action bar. The status of the selected system role changes to GRANTED.</p> <p>To prevent users in a specific system role from administering the batch template, select the system role and click Deny on the action bar. The status of the selected system role changes to DENIED. If a user has multiple system roles and one of those roles is denied access rights, he or she cannot administer the batch template, even if another of his or her system roles is granted rights.</p> <p>To not grant a user in a specific system role access rights but also not prevent the user from administering the batch template, such as for a user with multiple system roles, you can choose to neither grant nor deny the system role administrator rights to the batch template. To remove the GRANTED or DENIED status assigned to a system role, select the role and click Clear on the action bar.</p> <p>To remove all GRANTED and DENIED statuses assigned to the system roles, click Clear all on the action bar.</p>
Assign permissions to customize fields within a batch	<p>In the System roles box on the right, you can assign permissions to customize fields within a batch.</p> <p>To enable users in a specific system role to customize the fields within a batch, select the system role and click Grant on the action bar. The status of the selected system role changes to GRANTED.</p> <p>To prevent users in a specific system role from customizing the batch template, select the system role and click Deny on the action bar. The status of the selected system role changes to DENIED. If a user has multiple system roles and one of those roles is denied access rights, he or she cannot customize the batch template, even if another of his or her system roles is granted rights.</p> <p>To not grant a user in a specific system role access rights but also not prevent the user from customizing the batch template, such as for a user with multiple system roles, you can choose to neither grant nor deny the system role rights to customize the batch template. To remove the GRANTED or DENIED status assigned to a system role, select the role and click Clear on the action bar.</p> <p>To remove all GRANTED and DENIED statuses assigned to the system roles, click Clear all on the action bar.</p>

Confirm and Save

Confirm and save is one of a series of forms on the Add a batch template screen. These forms are designed to walk you through the process of creating a batch template. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form you are currently working on. If you have not entered required information on a form, a yellow warning appears. To add a batch template, select **Add** on the Batch Templates page. From here, you can access the **Confirm and save**.

Screen Item	Description
General information	Review the general information to ensure the fields and options you selected are accurate before you save the template. Click Previous to go back and edit information.
Commit options	Review the commit options to ensure the batch commit options you selected are accurate before you save the template. Click Previous to go back and edit information.

Edit a Batch Template

Once you add a batch template to the database, you may need to make changes later. For example, you may need to edit its description, remove a selected field, or change a field's default value. The Batch Templates page lists the available batch templates in the database.

► Edit a batch template

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch template**. The Batch Templates page appears.
3. In the **Batch templates** grid, select the batch template to edit.

Note: You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click the **Filter** icon and, in the **Category** field, select the category by which to filter the batches. To display inactive batch templates in the grid, mark **Include inactive**. To view the batch templates that meet the specified filters, click **Apply**.

4. On the action bar, click **Edit**. The Edit a batch template screen appears. The items on this screen are the same as on the Add a batch template screen. For information about the items on this screen, see *Add a Batch Template Forms* on page 21.
5. Update the information as necessary on each of the Edit a batch template screens.

Note: For enhanced revenue batches, if your organization configures multiple general ledger account systems and implements site security, you must select the system you want to use with this batch template in the **Account system** field.

6. Click **Save**. You return to the Batch Templates page.

Copy a Batch Template

With *Batch entry*, you can easily create a new batch template based on a template already in your database. When you copy a batch template, you create a new batch template with the same batch type and workflow and same selected fields and field defaults as the selected batch template. This saves you time, as you do not need to recreate the field selection already used in another batch template. Once you create the new batch template, you can edit it, such as to adjust the selected fields or field defaults.

► Copy a batch template

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
3. In the **Batch templates** grid, select the batch template to copy.

Note: You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click **Filter** and, in the **Category** field, select the category by which to filter the batches. To display inactive batch templates in the grid, mark **Include inactive**. To view the batch templates that meet the specified filters, click **Apply**.

4. On the action bar, click **Copy**. The Copy batch template screen appears.

5. Enter a unique name and description to identify the new batch template.
6. Click **Save**. You return to the Batch Templates page. In the **Batch templates** grid, the new batch template appears.
7. Edit the new batch template as necessary. For example, adjust the selected fields or field defaults. For information about how to edit a batch template, see *Edit a Batch Template* on page 30.

Import Data into a Batch Template

With *Batch entry*, you can import data from a spreadsheet created in another application into the database. For example, you enter information about new constituents into a spreadsheet application such as Microsoft *Excel*. You can create a business process to easily import the information from the spreadsheet into a batch template.

You can add an import process from the Batch Templates page. In the **Batch templates** grid, select the batch template to capture the imported data and click **Create import** on the action bar. The Add import process screen appears. For information about the items on this screen, see the *Import* chapter.

Mark a Batch Template as Inactive

You can mark a batch template as inactive, such as if your organization no longer uses it. When a batch template is marked inactive, users can no longer use it to create batches.

Note: To use an inactive batch template to create a batch, you can mark it as active. For information about how to mark an inactive batch template as active, see *Mark a Batch Template as Active* on page 33.

► Mark a batch template as inactive

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
3. In the **Batch templates** grid, select the batch template to mark inactive.

Note: You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click **Filter** and, in the **Category** field, select the category by which to filter the batches. To view the batch templates that meet the specified filters, click **Apply**.

4. On the action bar, click **Mark inactive**. A message appears to verify the batch template is inactive.
5. Click **Yes**. You return to the Batch Templates page. When **Include inactive** is unmarked, the batch template does not appear in the **Batch templates** grid.

Mark a Batch Template as Active

You can mark an inactive batch template as active, such as so your organization can use it to create a batch.

► Mark a batch template as active

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
3. In the **Batch templates** grid, select the inactive batch template to mark active.

Note: You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click **Filter** and, in the **Category** field, select the category by which to filter the batches. To display inactive batch templates in the grid, you must mark **Include inactive**. To view the batch templates that meet the specified filters, click **Apply**.

4. On the action bar, click **Mark active**. A message appears to confirm you want to mark the batch template as active.
5. Click **Yes**. You return to the Batch Templates page. In the **Batch templates** grid, the batch template appears.

Delete a Batch Template

You can delete batch templates from the Batch templates page. Before you can delete a batch template, you must delete all batches associated with the template.

► Delete a batch template

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Under **Configuration**, click **Batch templates**. The Batch Templates page appears.
3. In the **Batch templates** grid, select the batch template to delete.

Note: You can limit the batch templates that appear in the **Batch templates** grid to those of a specific type of data. To filter the grid, click **Filter** and, in the **Category** field, select the category by which to filter the batches. To display inactive batch templates in the grid, mark **Include inactive**. To view the batch templates that meet the specified filters, click **Apply**.

4. On the action bar, click **Delete**. A message appears to confirm the deletion of the batch template.
5. Click **Yes**. You return to the Batch Templates page.

Note: Before you can delete a batch template, you must first delete all batches associated with the template. If you attempt to delete a batch template that has associated batches in the database, a message appears to inform you that you cannot delete the batch template. To return to the Batch Entry page, click **OK**.

Default Basic Batch Templates

To help you work with *Batch entry*, the program provides some basic batch templates. These batch templates provide the fields necessary to add basic information to create records. You can also use these batch templates to import information from a delimited or fixed-width file.

Constituent Batch Basic

The table below explains the fields included in the Constituent Batch Basic template. You can use this batch template to add or import multiple new constituent records. If a field is not required, you can leave it blank as necessary. For additional information about the constituent data entry fields, see the *Constituents Guide*.

Field	Description
Constituent type	Enter the type of constituent to add. This field is required. To add a person such as a donor or an employee as a constituent, enter "Individual." To add a business or company that supports your mission as a constituent, enter "Organization." To add a group of constituents who donate together under one entity such as a giving circle, enter "Constituent group."
Title	For an individual constituent, enter the title of the individual such as Mr., Mrs., or Dr.
First name	For an individual constituent, enter the first name of the individual.
Last/org/group/household name	This field is required. For an individual constituent, enter the last name of the individual. For an organization constituent, enter the name of the organization.
Suffix	For an individual constituent, enter the suffix of the individual such as Jr., III, or PhD.
Address type	Enter the type of address to add for the constituent such as Home or Business.
Address	Enter the street address of the constituent, including apartment or suite number. If the address requires multiple address lines, press ENTER on your keyboard to access a new line within the field. Similarly, if you are adding information to the Address cell of an import spreadsheet, click ALT + ENTER on your keyboard to move to a new line within the cell.
City	Enter the city of the constituent.
State	Enter the state of the constituent.
Country	Enter the country of the constituent, such as United States.
Zip code	Enter the Zip code of the constituent.
Phone type	Enter the type of phone number to add for the constituent, such as Home or Business.
Phones—Phone number	Enter the phone number of the constituent.
Phones—Primary	To use the phone number as the primary number at which to contact the constituent, select the checkbox. To import this value, enter True or Yes to use the number as the primary contact. Otherwise, enter False or No.
Phones—Call after	If the constituent requests you not call until after a specific time of day, enter the time to allow calls to the constituent.
Phones—Call before	If the constituent requests you not call after a specific time of day, enter the time to stop calls to the constituent.
Phones—Start date	If the phone number is active only after a specific date, enter the date at which to begin use of the number.
Email address	Enter the email address for the constituent.
Spouse first name	For an individual constituent with a spouse, enter the first name of the spouse.
Spouse last name	For an individual constituent with a spouse, enter the last name of the spouse.

Field	Description
Spouse copy address	To copy the constituent's address to the spouse's record, select the checkbox. To import this value, enter True or Yes to copy the constituent's address. Otherwise, enter False or No.
Academic catalog program	Select the constituent's program at the institution, such as "Undergraduate."
Academic catalog degree	Select the degree of the program the constituent attends at the institution.
Constituent site	Select the site you want to associate with the record. Records that can be associated with more than one site have a Site grid, instead of a Site field.

Event Batch Basic

The table below explains the fields included in the Event Batch Basic template. You can use this batch template to add or import multiple new event records. If a field is not required, you can leave it blank as necessary. For additional information about the event data entry fields, see the *Events Guide*.

Field	Description
Name	Enter the name of the event. This field is required.
Start date	Enter the date of when the event starts. This field is required.
Appeal	Enter the name of the appeal to associate with the event.
Capacity	Enter the number of participants the event can accommodate.
Category	To help classify the event, enter its category or type such as Reception or Sporting event.
Contact	Enter the name of the constituent who serves as a contact at the location of the event.
Coordinators	Enter the name of the staff member who serves as an event coordinator for the event.
Description	Enter a description to help further identify the event.
End date	Enter the date on which the event ends.
End time	Enter the time at which the event ends.
Expenses—Type	Enter the type of expense to add for the event, such as Supplies.
Expenses—Vendor	Enter the name of constituent who serves as a vendor that performs the service associated with the expense.
Expenses—Budgeted amount	Enter the total amount budgeted for the expense.
Expenses—Agreed amount	Enter the total amount agreed upon with the vendor associated with the expense.
Expenses—Amount paid	Enter the total amount paid toward the vendor associated with the expense.
Expenses—Due date	Enter the date when payment for the expense is due to the vendor.
Expenses—Date paid	Enter the date your organization pays the vendor associated with the expense.
Expenses—Comment	Enter any additional information about the expense.
Location	Enter the name of the location where the event occurs.
Prices—Registration type	Enter the type of registration price to associate with the event, such as Family or Corporate sponsor.

Field	Description
Prices—Name	Enter the name of the price associated with the registration type.
Prices—Registration count	Enter the total number of registrations to associate with the registration type. For example, for a registration type of Golf Foursome, enter 4.
Prices—Registration fee	Enter the amount a registrant pays to attend the event as the registration type.
Prices—Cost	Enter the total cost for the registration type. For example, the total cost of the event including catering and facility rental fees, divided by the total number of registrants of the registration type.
Start time	Enter the time at which the event begins.
Tasks—Owner	Enter the name of the staff member assigned the task.
Tasks—Name	Enter the name of the task to associate with the event, such as Call the caterer.
Tasks—Due date	Enter the date by which the owner must perform the task.
Tasks—Comment	Enter any additional information about the task.

Event Registrant Batch Basic

The table below explains the fields included in the Event Registrant Batch Basic template. You can use this batch template to add or import multiple new event registrant records. If a field is not required, you can leave it blank as necessary. For additional information about the event registrant data entry fields, see the *Events Guide*.

Field	Description
Event	Enter the name of the event associated with the registration. This field is required.
Registrant	Enter the name of the constituent to register for the event. This field is required.
Status	Enter the status of the registration, such as Registered or Attended.
Registration option	Enter the name of the registration price at which the registrant registers for the event, such as Adult or Family. This field is required.
Quantity	Enter the number of registrations the registrant registers for the event. For example, if a registrant registers for two Adult registration, enter 2.
Guests—Guest	Enter the name of the constituent who the registrant registers as a guest.
Guests—Waive registration fee	To waive the registration fee for the guest, select the checkbox. To import this value, enter True or Yes to waive the registration fee. Otherwise, enter False or No.
Guests—Attended	If the guest attended the event, select the checkbox. To import this value, enter True or Yes if the guest attended. Otherwise, enter False or No.
Waive benefits	To waive the benefits for the registrant, select the checkbox. To import this value, enter True or Yes to waive the benefits. Otherwise, enter False or No.
Date	Enter the date of when the registrant registers for the event.

Enhanced Revenue Batch

The table below explains the default fields included in the Enhanced Revenue Batch template. You can use this batch template to add or import multiple, new revenue records. For more information about the revenue data entry fields, see the *Revenue Guide*.

Field	Description
Account system	Select the General Ledger account system you want to use with this batch template. Only account systems for which you have the proper security rights appear.

Field	Description
Constituent	Enter the name of the constituent associated with the revenue transaction.
Lookup ID	Enter the primary lookup ID of the constituent associated with the revenue transaction.
Amount	Enter the total amount of the revenue transaction.
Date	Enter the date to associate with the transaction, such as the date your organization receives the revenue.
Revenue type	Enter the type of revenue transaction to add: Payment, Pledge, or Recurring gift.
Payment method	Enter the payment method, such as Cash or Credit card.
Application	Select how to apply the payment. For example, the revenue may be a donation or payment towards an unapplied matching gift claim.
Appeal	If the transaction is in response to an appeal, enter the name of the appeal.
Opportunity	Enter the opportunity to which you want to apply the revenue, if any.
Designation	Enter the designation to which you want to apply the revenue.
GL post status	Specify the post status of the revenue in the General Ledger. To have the program automatically post the payment when you next run a Post to GL process, select "Not Posted." To not post the payment to the General Ledger, select "Do Not Post."

Revenue Update Batch

The table below explains the default fields included in the Revenue Update Batch template. You can use this batch template to update existing revenue records. For more information about the revenue data entry fields, see the *Revenue Guide*.

Field	Description
Revenue	Enter the existing revenue transaction you want to update.
Account system	Select the General Ledger account system you want to use with this batch template. Only account systems for which you have the proper security rights appear.
Constituent	Enter the name of the constituent associated with the revenue transaction.
Lookup ID	Enter the primary lookup ID of the constituent associated with the revenue transaction.
Amount	Enter the total amount of the revenue transaction.
Date	Enter the date to associate with the transaction, such as the date your organization receives the revenue.
Revenue type	Enter the type of revenue transaction to add: Payment, Pledge, or Recurring gift.
Payment method	Enter the payment method, such as Cash or Credit card.
Application	Select how to apply the payment. For example, the revenue may be a donation or payment towards an unapplied matching gift claim.
Appeal	If the transaction is in response to an appeal, enter the name of the appeal.
Opportunity	Enter the opportunity to which you want to apply the revenue, if any.
Designation	Enter the designation to which you want to apply the revenue.
GL post status	Specify the post status of the revenue in the General Ledger. To have the program automatically post the payment when you next run a Post to GL process, select "Not Posted." To not post the payment to the General Ledger, select "Do Not Post."
GL post date	Specify the post date of the revenue in the General Ledger.
Adjustment date	Enter the date of the revenue adjustment.
Adjustment post date	Enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.
Adjustment	Enter any additional information about the revenue adjustment.

Field	Description
details	
Adjustment reason	Select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.
Adjustment post status	Select “Not posted” or “Do not post” as the post status for the adjustment.
Update tributes	If a payment or pledge transaction amount is changed, regardless of whether it is posted or not posted, the tribute amount associated with the transaction will update proportionately. For example, if a pledge of \$100 that has an associated tribute of \$30 is changed to \$70, then the tribute will update to \$21.

Batch Types

The following table lists the types of batches you can create in the program.

Batch Type	Description
Account Batch	Batch type for adding account records batch.
Account by Account System Batch	Batch type for adding account records by account system.
Account Segment Mapping Batch	Batch type for adding account segment mappings.
Account Segment Mapping By Account System Batch	Batch type for adding account segment mappings by account system.
Address Validation Batch	Batch type for updating constituent address records following the address validation process.
Address Finder Batch	Batch type for updating constituent address records through a batch.
Constituent Address Update Batch	Batch type for updating address records through a batch.
Constituent Batch	Batch type for adding constituent records into a batch.
Constituent Update Batch	Batch type for adding or updating constituent records.
Currency Exchange Rate Batch	Batch type for adding currency exchange rate records into a batch.
Deceased Record Finder Batch	Batch type for decessing constituent records through a batch.
Direct Debit Return Batch	Batch type for adding direct debit return file information into a batch.
Direct Marketing Effort Batch	Batch type for adding direct marketing effort records into a batch.
Educational History	Batch type for adding or updating educational history records.

Batch Type	Description
Update Batch	
Email Finder Batch	Batch type for adding email address records.
Enhanced Revenue Batch	Batch type for adding revenue records into a batch.
Event Batch	Batch type for adding event records.
Event Registrant Batch	Batch type for adding registrant records.
Revenue Update Batch	Batch type for updating revenue records in a batch.
Exchange Calendar Item Batch	Batch type for updating interaction records using changes made to linked Exchange calendar items.
Exchange Contact Update Batch	Batch type for updating constituent records using changes made to linked Exchange contact records.
Exchange Email Batch	Batch type for adding Exchange emails to constituent records.
Fundraising Purpose Financial Info Batch	Batch type for adding designation level financial information records.
Giving Summary Update Batch	Batch type for adding or updating giving summary information on constituent records.
Interaction Batch	Batch type for adding interaction records.
Membership Dues Batch	Batch type for adding memberships.
Modeling and Propensity Batch	Batch type for modeling and propensity information.
Modeling and Propensity Update Batch	Batch type for adding or updating modeling and propensity information on constituent records.
People Finder Batch	Batch type for adding PeopleFinder address records.
Phone Finder Batch	Batch type for adding PhoneFinder records.
Pledge Write-off Batch	Batch type for adding Pledge write-off records.
Sponsor Batch	Batch type for adding sponsorship records into a batch.
Stewardship Plan Step Update Batch	Batch type for adding stewardship plan step records.
Timesheet Batch	Batch type for adding timesheet records.
Update Multiple Constituents From MatchFinder Batch	Batch type for updating constituents from the MatchFinder Online service.

Revenue Batch Constituent Security

In revenue batches, you can enable constituent security so that a batch owner cannot add revenue to constituents he doesn't have access to. When enabled, an exception will occur when the batch is validated or committed. The batch owner must have access to a constituent in a specific site or in a constituent security group in order to commit the batch and add the revenue.

On the Batch Entry page, click **Revenue batch constituent security** under **Configuration**. Select the checkbox to enable the additional constituent security.

Batch Entry

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To add or update information in the database, you can add or edit an individual record with the appropriate information. When you add or edit many records at once, this process may take a long time, depending on the number of records affected. Batch entry is an alternate method to add or update records in your database.

In *Batch entry*, you enter and update information on records quickly because you do not open each individual record. Instead, you create a batch template to specify the fields to add or update in each various type of record. The program lists the selected fields as fields in a spreadsheet, called a batch, so you can efficiently enter information in the database. When you create a batch template, you also select a batch workflow, which defines the process a batch goes through to add or update its records in your database.

Note: If your organization integrates with *Blackbaud Internet Solutions*, Microsoft *Outlook*, or *MatchFinder Online*, you can download information from these programs into uncommitted batches. In *Batch entry*, you can manage the batches generated when you download information from another program.

Warning: If your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the **Account system** field appears as an available field in a revenue batch. If you create an account system default in *Administration* and a user does not have rights to post to that account system, when the user adds revenue to the batch, the account system default is set to the first account system created to which the user has rights.

Batch Process

Regardless of the type of batch you create, your organization goes through the same process to use *Batch entry* to add or update records in its database.

1. Configure the batch numbering scheme. There are two types of numbering schemes you can create. If you want to manually enter the batch number as you create batches, you must create a numbering scheme with a type of 'Manual.' When you create a 'Manual' numbering scheme, you enter the batch number for the specific batch. When you create an 'Auto-generated' numbering scheme, you can define the batch identifier and/or date formats, and the order in which they appear. The program will assign batch numbers for new batches automatically. For more information about batch numbering schemes, see the Batch Configuration chapter or the Batch Configuration section of the help file.

Note: Integration batches and import batches cannot use a template that contains a 'Manual' numbering scheme.

2. Configure the batch workflow. The batch workflow determines the statuses the batch must complete before its records can commit to the database. For more information about batch workflows, see the Batch Configuration chapter or the Batch Configuration section of the help file.
3. Configure the batch template. Before you can enter data into a batch, you must create a batch template to select the batch type, numbering scheme, and workflow. You can also specify any additional fields and defaults to use in the batch's records. You use the same batch template for multiple batches. For more information about batch templates, see the Batch Configuration chapter or the Batch Configuration section of the help file.
4. Create an uncommitted batch. When you or the program enter data into a batch, the batch is uncommitted. You can add a batch from *Batch entry*, or the program can create a batch during a business process. When a batch is uncommitted, its data has not yet created or updated records in your database. You can continue to edit the data entered in an uncommitted batch or move an uncommitted batch through its workflow. For more information about uncommitted batches, see Uncommitted Batches on page 44.
5. Once you create a batch, you can use *Batch search* to find it in your database. For information about *Batch search*, see Batch Search on page 42.
6. Commit the batch. Once data entry and the batch workflow are complete, you can commit the batch. When you commit the batch, the program uses the data entered in the batch to create or update records in your database. Once a batch is committed, you can view information about the data that did and did not successfully create or update records in your database. For more information about committed batches, see Committed Batches on page 57.

Batch Search

From *Batch search*, you can search for and open a batch. Once you add a batch, you can use the Batch Search page at any time to find it.

► Search for a batch

When you search for a batch, you can make the search broad or specific, depending on the criteria you select. To get the records you need, we recommend you be selective and enter detailed information. For example, you can use the **Batch number**, **Description**, **Status**, and **Batch type** fields. For searches returning more than 100 batches, only the first 100 appear in the results.

1. From *Constituents*, *Revenue*, or the Batch page in *Administration*, click **Batch search**. The Batch Search screen appears.

Batch number: Created by:

Description: Created on:

Status: Batch type:

☐ Include batches with EFT transmission files

Results

Batch number	Description	Created by	Created on
--------------	-------------	------------	------------

- In the top frame, decide how to filter batches for this search and enter data in the fields. The criteria you can use includes the batch number, description, status, creator, creation date, and batch type.

To include batches that contain electronic funds transfer (EFT) transmission files in the search results, select **Include batches with EFT transmission files**.

You can enter data in all fields or none, depending on how broad or narrow a search to use. Depending on your criteria, the program may find one batch or many. For information about the fields on the search screen, see [Batch Search Screen](#) on page 43.

- Click **Search**. The program searches the database.
- In the **Results** grid, all batches that match your search criteria appear. Select the batch to open.
- Click **Select**. The batch data entry screen appears. For information about the items on this screen, see [Batch Data Entry Screen](#) on page 63.

Batch Search Screen

The table below explains the items on the Batch Search screen. For more information about how to access this page, see [Batch Search](#) on page 42.

Screen Item	Description
Batch number	Enter the unique batch number of the batch to find. To include all batches in the search regardless of batch number, or if you do not know the batch number, leave this field blank.
Description	Enter the description given to help identify the batch. To include all batches in the search regardless of description, or if you do not know the batch description, leave this field blank.
Status	Select the status of the batch to find. You can select "Uncommitted," "Committed," or "Deleted."

Screen Item	Description
	To include all batches in the search regardless of status, or if you do not know the batch status, leave this field blank.
Created by	Enter the batch owner who created the batch to find. To include all batches in the search regardless of creator, or if you do not know the batch creator, leave this field blank.
Created on	Enter the date on which the batch to find was created. To select the date from a calendar, click the drop-down arrow. To include all batches in the search regardless of creation date, or if you do not know the batch creation date, leave this field blank.
Batch type	Enter the type of records included in the batch to find. To include all batches in the search regardless of type, or if you do not know the batch type, leave this field blank.
Include batches with EFT transmission files	To include batches with electronic funds transfer transmission files, mark this checkbox. By default, this checkbox is not marked.
Results	Displays all batches that match your search criteria. To open a batch, select it in the grid and click Select .

Pledge Write-off Batch Search

Use the Pledge write-off Batch Search to locate the pledges you want to write off. To access the Pledge Write-off Batch Search, click the magnifying glass in the **Pledge** field of the Pledge Write-off batch.

In the top frame, decide how to filter pledges for the search and select/enter your criteria. You can enter data in all fields or none, depending on how broad or narrow you want your search to be.

When you select **Search**, the program searches the database and displays all the pledges that meet your search criteria in the **Results** grid.

Batch Entry Page

On the Batch Entry page, you manage your uncommitted and committed batches from one central location. You can also enter data into batches and process batches through their workflows. To access the Batch Entry page from *Administration*, click **Batch entry** from the navigation bar.

Note: If you work with constituent or revenue records, you can access the Batch Entry page from *Constituents* or *Revenue*. If your organization integrates with **Blackbaud Internet Solutions**, you can access the Batch Entry page from the Web Transactions page.

From the Batch Entry page, you can also configure the numbering schemes, workflows, and templates necessary to create and manage your batches. For more information, see the Batch Configuration chapter or the Batch Configuration section of the help file.

Uncommitted Batches

On the Uncommitted Batches tab, you can view and manage your batches that are available for data entry. In the **Uncommitted batches** grid, information about your uncommitted batches appears. This information includes the batch number, template, description, owner, status, date added, and category.

You can see batches that you currently own in the workflow and batches for which you have type and site rights.

If a batch is overdue in its current workflow status, a yellow caution symbol appears next to the batch number in the **Batch number** column.

The screenshot shows the 'Batch Entry' application interface. At the top, there are tabs for 'Uncommitted Batches' and 'Committed Batches'. Below the tabs, there's a section for 'Uncommitted batches (14)' with icons for 'Add', 'Validation report', and 'Export list'. A search and filter section includes 'Date range' (Last 30 days), 'Batch template', 'Category', 'Owner', 'Sites' (All sites), and a checkbox for 'Show only batches with exceptions'. There are 'Apply' and 'Reset' buttons. Below this is a table of batches:

Batch number	Batch template	Description	Owner	Status	Date added	Category	Site	Custom
35	Revenue Batch...	Batch created b...	BillThBBECDev3	Open	4/23/2012	Revenue	All sites	
43	Revenue Batch...	Exceptions fro...	BillThBBECDev3	Open	4/23/2012	Revenue	All sites	
45	Revenue Batch...	Exceptions fro...	BillThBBECDev3	Open	4/23/2012	Revenue	All sites	

Additional batch information appears in the details pane that expands directly beneath the batch you select. For imported batches, the details pane includes a link to the import process that generated the batch. For exception batches, the details pane includes a link to the original batch in the batch chain. It also lists the exception types, which display as hyperlinks that allow you to correct the exceptions. In the case of duplicates, the exception type link takes you to the duplicate resolution screen. For other exception types, the link opens the batch with a filter applied to display only rows that contain the selected exception message.

The screenshot shows the details pane for batch 7. At the top, there's a header with columns: Batch number, Batch tem..., Description, Owner, Status, Date adde..., Category, Site, and Custom. Below the header, there's a row for batch 7 with the following details:

Batch number	Batch tem...	Description	Owner	Status	Date adde...	Category	Site	Custom
7	Constituen...	Exceptions...	SarahMcB...	Review	4/25/2012	Constituent	All sites	

Below the table, there are buttons: Edit, Update status, Commit, and Delete. The details pane shows the following information:

- Batch type: Constituent Batch
- Import file: File15.csv
- Original batch size: 7
- Date changed: 6/4/2012
- Import process: ImportConstituent
- Original batch: 6
- New rows disabled: No

There is a section for 'Exceptions' with a table:

Exception	Count
Errors from validation	7
General errors	7
Import errors	7
Invalid value errors	7

Depending on the workflow status of the batch and your security rights and system role, you can perform many tasks to manage your uncommitted batches. When the batch completes its step in the workflow, you can update its status to the next status in the workflow or commit its records, depending on its current status.

For a revenue batch, you can view a validation report to verify the data entry of payment information. The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. In addition, the report includes other data entered for the transactions in the batch. To view the validation batch, select the batch for which to generate the report and click **Validation report** on the action bar. For information about the validation report, see Revenue Batch Validation Report on page 180.

When you commit a batch, you can create an exception batch, which contains all records that do not commit to the database. When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the

original batch to the database. To view all batches related to an uncommitted batch, select the batch in the grid and click the batch number. The Batch Exception Chain page for the batch appears. For information about the items on this page, see [Batch Exception Chain](#) on page 62.

To receive notification of changes to the batches in the **Uncommitted batches** grid, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when uncommitted batches are assigned, rejected, or approved, depending on your organization's batch workflow. To subscribe to the RSS feed, click the **View RSS feed** button.

To limit the batches that appear in the grid to those of a specific type of data, use the filters that appear above the grid. In the **Batch template** field, select the template by which to filter the batches. In the **Category** field, select the category by which to filter the batches. In the **Owner** field, select the owner of the batches to view. For example, if you manage multiple batch types and want to view only batches about constituent data, select "Constituent" in the **Category** field and click **Apply**. To clear the filter criteria, such as to show all uncommitted batches regardless of category or owner, click **Reset**.

To limit the batches that appear in the grid to those of a specific type of data, use the filters that appear above the grid. In the **Date range** field, select the date range by which to filter the batches. You can select to display batches that were added during the last 7 days or last 30 days. In the **Owner** field, select the owner of the batches to view. In the **Batch template** field, select the template by which to filter the batches. In the **Category** field, select the category by which to filter the batches. For example, if you manage multiple batch types and want to view only batches about constituent data, select "Constituent" in the **Category** field and click **Apply**. You can also select to show only batches that contain exceptions. To clear the filter criteria, such as to show all uncommitted batches regardless of category or owner, click **Reset**.

To update the information that appears in the grid, click **Refresh** on the action bar.

Add a Batch

To use *Batch entry* to add records, you must define the basic properties of the batch. These properties include the batch number and description, the template used to create the batch, and the batch's owner. For a revenue batch, you can also enter the projected total monetary amount of the payments in the batch. To add a batch to the database, click **Add** under **Uncommitted batches**.

► Add a batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. On the action bar of the **Uncommitted batches** grid, click **Add**. The Add a batch screen appears. For information about the items on this screen, see [Add a Batch Screen](#) on page 48.

Add a batch

Batch template: Field options: ☐ Override

Batch number:

Description:

Owner:

☐ Enable auto save

Projected #:

Projected amount:

4. In the **Batch template** field, select the batch template to use. The batch template defines the fields and any default values that appear in the batch. The **Batch template** field displays the batch templates in the database applicable to your system role. If the required batch template does not appear, your organization must add it to the database.

For information about how to add a batch template, see the Batch Configuration chapter.

5. To adjust the fields in the batch template, click **Field options**. The Batch field options screen appears. For information about how to customize the fields of the selected batch templates, see *Customize the Fields in a Batch* on page 72.
6. In the **Batch number** field, enter a unique number to identify the batch. Once you save a batch, you can no longer use its number for batches using the template. If you enter a number that another batch uses, when you click **Save**, a message appears to remind you that the batch number must be unique. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. If you use a global numbering scheme, the batch uses the next number available in the global scheme. To manually enter a new number, mark **Override**.
7. In the **Description** field, enter a unique description to identify the batch. The description appears in the **Uncommitted batches** grid so you can determine the purpose of the batch before you open it.
8. In the **Owner** field, select the user who owns the batch in its initial status.

Note: The program automatically assigns the person creating the batch as the batch owner. The selected owner owns the batch in its initial status. When you update the status of a batch, you can assign the batch to a new owner. For information about how to update a batch status, see *Update a Batch to the Next Workflow Status* on page 52.

9. Mark **Enable auto save** if you want the batch to automatically save each row as you work.
10. If the selected batch template is for a revenue batch, the **Projected #** and **Projected amount** fields are enabled. Enter the total number of payments you plan to enter in the batch and the total projected monetary value of those payments.
11. Click **Save**.

- If you leave the **Owner** field blank or assign ownership of the batch to yourself, the batch data entry screen appears. For information about how to enter data into the batch, see Batch Data Entry on page 62.
- If you assign batch ownership to another user, you return to the Uncommitted Batches tab.

Note: You can configure system alerts to automatically notify application users by email when they become owners of new batches. For information about how to enable system alerts for batches, see the *Administration Guide*.

Add a Batch Screen

The table below explains the items on the Add a batch screen. For more information about how to access this screen, see Add a Batch on page 46.

Screen Item	Description
Batch template	<p>Select the batch template to use to create the batch. The batch template defines the fields and any default values used in the batch.</p> <p>Typically, a batch processing manager creates the batch template. If the batch template you want does not appear, consult your batch processing manager. For information about how to add a batch template, see the Batch Configuration chapter or the Batch Configuration section of the help file.</p> <p>You can adjust the fields and default settings selected for the batch template. To adjust the fields included in the selected batch template, click Field options. The Customize fields for batch screen appears. For information about the items on this screen, see Customize Fields For Batch Screen on page 73.</p> <p>After you add the batch to the database, you cannot change its selected batch template.</p>
Batch number	<p>Select whether to use an automatically generated number or a custom number to identify the batch. When you open a batch, the batch number appears in the top corner of the screen. On the Batch Entry page, the batch number appears next to each corresponding batch in the grids.</p> <p>If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark Override. For information about batch numbering schemes, see the Batch Configuration chapter or the Batch Configuration section of the help file.</p> <p>If you selected “Manual”, enter a unique number to identify the batch in the field. Once you save a batch, you can no longer use its number for batches using the template.</p> <p>After you add the batch to the database, you cannot automatically generate a new number for the batch.</p>
Description	<p>Enter a description to help identify the batch and explain why you enter the records in the database. You can enter up to 255 characters in this field.</p> <p>The description you enter appears in the Uncommitted batches grid so you can determine the purpose of the batch before you open it.</p>
Owner	<p>Select the user to process the batch in its initial status.</p> <p>The user you select in this field owns the batch in its initial status. When you update the status of the batch to next status in the workflow, you can assign it to a new owner. For more information about how to update the status of a batch, see Update a Batch to the Next Workflow Status on page 52.</p> <p>You can configure system alerts to automatically notify application users by email when they become batch owners. For information about how to configure system alerts for batches, see the <i>Administration Guide</i>.</p>
Enable auto save	Mark Enable auto save if you want the batch to automatically save each row as you work.
Projected #	When the selected batch template is for a revenue batch, the Projected # field is enabled.

Screen Item	Description
	Enter a total number of payment records you plan to enter in the batch. The batch allows an unlimited number of records. For example, you create a batch for the payments you received on the previous day. You received a total of ten payments yesterday, so you enter "10." Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.
Projected amount	When the selected batch template is for a revenue batch, the Projected amount field is enabled. Enter the projected monetary amount for the payment records you plan to enter in the batch. For example, you create a batch for the payments you received on the previous day. You received payments totalling \$500 yesterday, so you enter "\$500." Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.

Edit a Batch

You can change the properties of the batch from the Batch Entry page or batch data entry screen. However, you cannot change the batch template selected to create the batch.

If the workflow status of the batch allows you to edit the records included in the batch, you can enter or update the data entry of the batch. In *Batch entry*, you enter the information for each record on a separate row of the spreadsheet, or batch, on the data entry screen. The batch template used to create the batch defines the fields that appear on the data entry screen. There is no limit to the number of records you can enter in a batch. You can only edit a batch if its workflow status allows it.

► Edit batch properties

Edit properties allows you to make changes to the batch configuration, such as batch number and description, once you have saved it. To ensure that a batch owner has access to the batch once it is committed, click **Update status** to change owners instead of **Edit properties**. For more information, see [Update a Batch to the Next Workflow Status](#) on page 52.

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. On the action bar of the **Uncommitted batches** grid, click **Edit, Edit properties**. The Edit batch properties screen appears. For information about the items on this screen, see [Add a Batch Screen](#) on page 48.

Note: On the Batch Entry page, you can limit the batches that appear in the **Uncommitted batches** grid to those of a specific type of data. To filter the grid, select the category or owner by which to filter the batches. To view the batches that meet the specified filters, click **Apply**.

4. Edit the information as necessary. You can mark **Enable auto save** if you want the batch to automatically save each row as you work.

Note: You cannot change the batch template selected to create the batch or select to automatically generate a new number for the batch. To select a different batch template for a batch or automatically generate a new batch number, you must create a new batch.

5. Click **Save**. You return to the Batch Entry page.

Note: The batch number must be unique per template. If you change the batch number to one that is used by another batch, a message appears to remind you that the batch number must be unique. Click **OK** and enter a new number to identify the batch.

► Enter records in a batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.

Note: If you use **Blackbaud Internet Solutions**, you can edit web batches from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab on the Web Transactions page.

3. Under **Uncommitted batches**, select the batch to edit.

Note: You can limit the batches that appear in the **Uncommitted batches** grid to those of a specific type of data. To filter the grid, click **Filter** and select the category by which to filter the batches. To view the batches that meet the selected category, click **Apply**.

4. On the action bar of the grid, click **Edit** and select **Edit batch**. The batch data entry screen appears. The items that appear on this screen depend on the selected batch template. For information about the items on this screen, see Batch Data Entry Screen on page 63.

Batch 213

Main Revenue

Batch: Save Save and close
 Constituent: Edit Go to
 Configuration: Customize fields
 Processes: Validate Update projected totals
 Messages: Clear row message Clear all Show all Select previous Select next Filter...

Properties

Owner: NikkiTrBBECDev3
 Projected No.: 0
 Projected total: 0.0000
 Current No.: 1
 Current total: 150.0000

	Account system	Constituent	Lookup ID	Amount	Date	Revenue type	Payment method	Application	Designation
1	Test System	Benjamin Aaron	8-10083972	\$150.00	11/20/2012	Payment	Cash	<multiple>	

Constituent Window

Individual Information

Applications

Application	Application amount
Recurring gift: Benjamin Aaron -...	\$30.00
Event registration fee: GLBenefit...	\$30.00
Event registration fee: Chapter E...	\$90.00

Matching gifts

Organization	Amount
--------------	--------

Page 1 of 1

https://infinity1.hostingtest.com/BBECDev3_21f5b01a-3ebf-49f0-ab88-658eb3258073/webui/webshellpage.aspx?SITEINFOID=21f5b01a-3ebf-49f0-ab88-658eb3258073&HOSTEDSITEINFOID=21f5b01a-3ebf-49f0-ab88-658eb3258073&databasename=BBECDev3# Batch 28

Note: The spreadsheet displays the fields and default values of the batch template selected to create the batch. When the batch is committed, each row of the spreadsheet that contains information becomes or updates a record.

Tip: To use your keyboard to quickly perform tasks on the toolbar ribbon, press **CTRL + M** on your keyboard to view shortcut keys for each feature available in the current view.

- In the grid, enter or update data for the records. To move from column to column, press **TAB** on the keyboard. For more information about data entry into a batch, see [Batch Data Entry](#) on page 62.

Note: The grid can contain up to 50 records. If you add more than 50 records into a grid, the batch adds a new page for the additional records. To navigate through the pages of the batch, click the right or left arrows next to the **Displaying page** field, or press **PAGE UP** or **PAGE DOWN** on your keyboard.

Note: To prevent the creation of blank address records, we recommend you delete default address information from the batch row when you add a record with no address data.

Note: To save the batch data entry at any time, click **Save** on the action bar or press **CTRL+ S** on the keyboard. If the batch data entry contains errors, such as a required field left blank, a message appears to inform you the batch is saved or that errors exist. To return to the batch data entry screen, click **OK**. If necessary, correct any errors and attempt to save the batch again.

- For columns with a down arrow, select the entry. For example, in the **Constituent Type** column of a constituent batch, select Individual or Organization.
- For columns with binoculars, use a Search screen to find the entry in the database.

Note: If the item you want to enter in the batch is not currently in the database, you can typically add it from the search screen. To add an item to the database, click **Add** on the action bar of the **Results** grid.

- For columns with date information, select the date from a calendar. To automatically enter the current date in a date field, press **F3** on your keyboard.

Note: Depending on the selected batch type, you can view additional information or perform various batch entry tasks. For more information about data entry into a batch, see *Batch Data Entry* on page 62.

6. When you enter payments in a revenue batch, if the selected constituent has an outstanding commitment, the *Apply to commitments* screen appears when you tab out of the **Constituent** column. Specify whether and how to apply the payment to the outstanding commitments. To not apply the payment to outstanding commitments, click **Cancel** to return to the batch data entry screen. For more information about how to apply a payment in a revenue batch to an outstanding commitment, see *Apply a Payment in a Revenue Batch to Outstanding Commitments* on page 85.

7. When you enter payment records in a revenue batch, the **Constituent Window** pane displays information about the constituent associated with a selected payment.

To view the **Constituent Window** pane, select **View, Show Constituent Window** from the menu bar. For information about the **Constituent Window** pane, see *Constituent Window* on page 64.

8. When you enter payment records in a revenue batch, you can easily view the properties of the batch, including the batch owner, the current amount of payments, the projected amount of payments, and any monetary totals.

To view the properties of a revenue batch, select **View, Show properties** on the menu bar.

9. To save the information and close the batch, click **Save and Close** on the toolbar.

Note: To save and close the batch, you can also press **CTRL + L** on the keyboard.

- If the program detects an error in the batch data entry, such as a required field is left blank, a message appears to inform you of the error. Click **OK** and correct any errors.
- If the program detects no errors in the batch data entry, a message appears to inform you that the batch saved successfully. To return to the Batch Entry page, click **OK**.

Update a Batch to the Next Workflow Status

When a batch is ready to move to the next step in the workflow, you can update its status. For example, your organization's workflow for a constituent batch specifies that after you enter data into a batch, an approver must validate the data entry before the program commits the batch to the database. To submit the batch for approval, you must update its status to the next status of the workflow. You can update a batch to the next workflow status from the Batch Entry page or the batch data entry screen.

Note: To ensure that a batch owner has access to the batch after it is committed, always use **Update status** to assign new owners instead of **Edit properties**. For more information about when to use **Edit properties**, see *Edit batch properties* on page 49.

Before you update the status of a batch, we recommend you validate the batch to verify the data entry is free from exceptions. For information about how to validate a batch, see *Validate a Batch* on page 74.

Note: If the batch is in the final status of its workflow before committal, the **Update status** option is disabled. To move the batch to its next status, you must commit the batch. For information about how to commit a batch, see *Commit a Batch* on page 54.

► Update a batch to the next workflow status

If you use **Blackbaud Internet Solutions**, you update web batches to the next step in the workflow from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab. For information about web batches, see the *Blackbaud Internet Solutions Integration Guide*.

1. On the Batch Entry page, select the batch to update on the Uncommitted Batches tab and click **Update status** on the action bar. The Update status screen appears. For information about the items on this screen, see Update Batch Status Screen on page 53.

2. In the **Next step** field, select the step to perform with the batch to move it to the next status. The selected batch workflow determines the options that appear in the list.
3. In the **Assign to** field, select the user to process the batch in the new status. The selections in this field are users with system roles that allow administrator rights to batches in the new status.

Note: You can configure system alerts to automatically notify application users by email when they become batch owners due to a batch status update. For information about how to enable system alerts for batches, see the *Administration Guide*.

4. In the **Comments** field, enter any comments about the batch. For example, enter a note for the new owner about why they receive the batch.
5. Click **Save**. You return to the Batch Entry page.

Under **Uncommitted batches**, the **Owner**, **Status**, and **Comments** columns display updated information about the new status.

Update Batch Status Screen

The table below explains the items on the Update batch status screen. For information about how to access this screen, see Update a Batch to the Next Workflow Status on page 52.

Screen Item	Description
Next step	Select the step to perform with the batch to move it to the next status. The selected batch workflow determines the options that appear in the list. For example, your batch workflow may require the data entry of a batch be approved before you commit it to the database. You can select to “Approve” or “Reject” the batch in its “Submitted” status.
Assign to	Select the user to process the batch in the new status. The available users in this field are only those with the appropriate permissions. You can configure system alerts to automatically notify application users by email when they become batch owners. For information about how to configure system alerts for batches, see the <i>Administration Guide</i> .

Screen Item	Description
Comments	If necessary, enter a comment about the batch, such as a note for the new owner about why they receive the batch. For example, if you reject a submitted batch during an approval process, enter a comment about why you reject the batch.

Commit a Batch

Once a batch completes its workflow, you can commit it to the database. When you commit a batch, the program uses the data in the batch to automatically create or update records in the database. After committal, you can view the batch commit status page and generate control and exception reports.

Note: On the Commit Multiple Batches page, you can create a process to commit multiple batches at once. For information about how to create a commit multiple batches process, see [Add a Multiple Batch Commit Process](#) on page 135.

Before you commit a batch, we recommend you validate the batch to verify the data entry is free from exceptions. For information about how to validate a batch, see [Validate a Batch](#) on page 74.

► Commit a batch to your database

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.

Note: If you use *Blackbaud Internet Solutions*, you can commit web batches from the Web Transactions page. To access your uncommitted web batches, select the Transactions tab.

3. Under **Uncommitted batches**, select the batch to commit.

Note: On the Batch Entry page, you can limit the batches that appear in the **Uncommitted batches** grid to those of a specific type of data. To filter the grid, click **Filter** and select the **Category** by which to filter the batches. To view the batches that meet the specified filter, click **Apply**.

4. On the action bar, click **Commit**. The Commit Parameters screen appears. The default setting for commit parameters are defined on the batch template. For information about the items on this screen, see [Commit Parameters Screen](#) on page 56.

Commit parameters

Batch number: 1

Batch commit instructions

☒ Validate batch before committing

☐ Delete batch after committing

☒ Create exception batch

Exception batch number:

☐ Override

Results

☐ Create control report

☒ Create output selection

Selection name:

☐ Overwrite existing selection

5. Under **Batch commit instructions**, select the options to perform during the batch committal.

- To validate the batch before you commit it to the database, mark **Validate batch before committing**.

Note: When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist. Before you commit a batch, we recommend you validate the batch to locate any data entry errors. For information about batch validation, see *Validate a Batch* on page 74.

- To delete the batch after you commit it to the database, mark **Delete batch after committing**.

Note: If you select to delete a batch after you commit it to your database, you cannot reuse its batch number. Each batch number must be unique.

- To create a batch of all records that do not commit to the database, mark **Create exception batch** and enter a name to identify the exception batch.

6. Under **Results**, select how to handle the records the program commits to your database.

- To generate a control report after you commit the batch to the database, mark **Create control report**. The control report describes the committed batch and provides information about the records included in the batch.
- To create a selection of all the records created in the database when you commit the batch, mark **Create output selection** and enter a name to help identify the selection. To overwrite any existing selection of the same name, mark **Overwrite existing selection**.

Note: The output selection query includes only records that commit to the database. The query does not include exceptions, or records that do not commit to the database. We strongly recommend you mark **Create output selection**. You can use this query when you create acknowledgement letters or other mailings for the constituents for whom you added payments in the batch.

7. Click **Start**. The commit process begins.

- If you mark **Validate batch before committing**, the program validates the batch. If the batch validates, the program commits its records to the database. If the validation fails, a validation report appears so you can view the exceptions.

Note: When you commit a web sign-up request batch that includes a new user registration that is linked to a constituent who is already a registered **Blackbaud Internet Solutions** website user, the transaction creates an exception. If you select to create an exception batch, you can delete the transaction from your database. From **Blackbaud Internet Solutions**, your organization can send the constituent an email as a reminder with the existing login information.

When the process completes, the batch commit status page appears. For information about the batch commit status page, see [Batch Commit Status Page](#) on page 59.

Commit Parameters Screen

The table below explains the items on the Commit parameters screen. For information about how to access this screen, see [Commit a Batch](#) on page 54.

Screen Item	Description
Validate batch before committing	To validate the batch before you commit it to the database, mark this checkbox. When you mark this checkbox, the program validates the batch when you click Start . If the batch validates, the program commits its records to the database. If the validation fails, a validation report appears so you can view the exceptions.
Delete batch after committing	To delete the batch file after you commit it to the database, such as to reduce the size of your database, mark this checkbox.
Create exception batch	To create a new batch of all records in the batch that do not commit, mark this checkbox. When you mark this checkbox, the Exception batch number field is enabled. If you mark Check for duplicate constituents , we recommend you also mark this checkbox. With the exception batch, you can perform a duplicate constituent check and confirm whether duplicate constituents exist in your database.
Exception batch number	If you mark Create exception batch , this field is enabled. Enter a number to help identify the exception batch. You can enter up to 100 characters in this field. The number of each exception batch must be unique.
Create control report	To create a control report after you commit the batch to the database, mark this checkbox. The control report describes the committed batch and provides information about the records included in the batch.
Create output Selection	To create a query of all records in the batch that commit to the database, mark this checkbox. When you mark this checkbox, the Selection name field and Overwrite existing Selection checkbox are enabled. We recommend you create an output selection query, which you can use such as when you create a mailing for the constituents for whom you added payments in a revenue batch.
Selection name	If you mark Create output Selection , this field is enabled. Enter a name to help identify the query. You can enter up to 100 characters in this field.
Overwrite existing Selection	If you mark Create output Selection , this checkbox is enabled. To overwrite an existing output selection query with the same name, mark this checkbox.

View a Validation Report for a Revenue Batch

The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. In addition, the report includes other data entered for the transactions in the batch. When you select a revenue

batch on the Uncommitted Batches tab, the **Validation report** option on the action bar is enabled.

You can view the validation report of a revenue batch from the Batch Entry page or the batch data entry screen.

- On the Batch Entry page, select the revenue batch on the Uncommitted Batches tab and click **Validation Report** on the action bar. The Revenue Batch Validation Report screen appears.
- On the data entry screen of the revenue batch, select **File, View navigation report** on the menu bar. The Report Viewer screen appears.

Delete an Uncommitted Batch

On occasion, you may need to delete all the data entered in a saved uncommitted batch from your database, such as to remove a duplicate batch. We recommend you back up your database before you delete any information.

► Delete an open batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Uncommitted Batches tab.
3. Under **Uncommitted batches**, select the batch to delete.

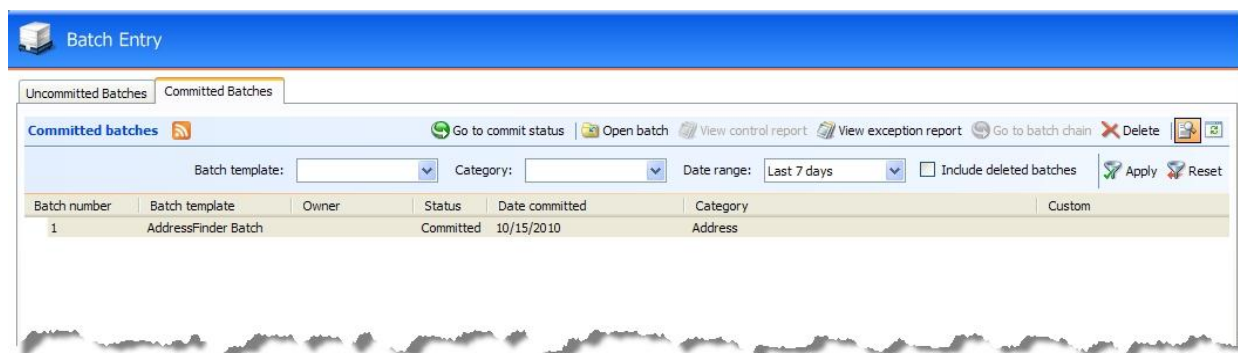
Note: You can limit the batches that appear in the **Uncommitted batches** grid to those of a specific type of data. To filter the grid, click **Filter** and select the category by which to filter the batches. To view the batches that meet the selected category, click **Apply**.

4. On the action bar of the grid, click **Delete**. A message appears to ask whether you want to delete the batch.
5. Click **Yes**. You return to the Batch Entry page. To maintain the batch number, the deleted batch still appears on the Uncommitted Batches tab. The **Status** column of the batch displays “Deleted.”

Committed Batches

On the Committed Batches tab, the **Committed batches** grid displays information about your batches that are committed to the database. When you commit a batch to the database, the program uses its data to create or update records in the database. For information about how to commit a batch, see [Commit a Batch on page 54](#).

You can see batches that you owned at some step in the workflow and batches for which you have type and site rights.



To receive a notification when a batch moves to the **Committed batches** grid, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when the grid is updated. To subscribe to the RSS feed, click **View RSS feed**. From the grid, you can perform many tasks to manage your committed batches.

When you commit a batch, you can create an exception batch, which contains all records that do not commit to the database. When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database.

To view all batches related to an uncommitted batch, click the batch number in the **Batch number** column of the grid. The Batch Exception Chain page for the batch appears. For information about the items on this page, see Batch Exception Chain on page 62.

To limit the batches that appear in the grid, you can filter the batches that appear by the specific type of data in the batch and the date the batch is committed to the database. You can also specify whether to include deleted batches in the grid.

- **Batch template** – In the **Batch template** field, select the template by which to filter the batches and click **Apply**.
- **Category** – In the **Category** field, select the category by which to filter the batches and click **Apply**. For example, if you manage multiple batch types and want to view only batches about constituent data, select “Constituent” and click **Apply**.
- **Date range** – In the **Date range** field, select the date range by which to filter the batches and click **Apply**. You can select to display batches that were committed during the Last 7 days or Last 30 days.

To update the information that appears in the grid, click **Refresh** on the action bar.

View the Batch Commit Status Page

When you commit a batch, the program generates the batch commit status page to track the committal of the batch. This page displays information about the batch and its commit process. From the batch commit status page, you can also view the control report and exception report of the batch. To view the commit status of a batch on the Committed Batches tab, select the batch in the **Committed batches** grid and click **Go to commit status**. The Batch Commit status page appears. For information about the items on this page, see Batch Commit Status Page on page 59.

Open a Committed Batch

Once you commit a batch, you can still open it to view its data. To open a batch on the Committed Batches tab, select the batch in the **Committed batches** grid and click **Open batch**. The batch data entry screen appears. For information about the items on this screen, see Batch Data Entry Screen on page 63.

View a Batch Control Report

The batch control report lists the records in the batch that were committed to the database and provides information about each record. The information that appears depends on the type of batch selected.

To view the batch control report for a batch on the Committed Batches tab, select the batch in the **Committed batches** grid and click **View control report** on the action bar. To view the batch control report from the batch commit status page, click **View control report** under **Reports**. For information about this report, see Batch Control Report on page 179.

View a Batch Exception Report

The batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. The information that appears depends on the type of batch selected.

To view the batch exception report for a batch on the Committed Batches tab, select the batch in the **Committed batches** grid and click **View exception report** on the action bar. To view the batch exception report from the batch commit status page, click **View exception report** under **Reports**. For information about this report, see Batch Exception Report on page 180.

Delete a Committed Batch

On occasion, you may need to delete the data entered in a committed batch from your database, such as to reduce the size of your database. We recommend you back up your database before you delete any information.

► Delete a committed batch

1. From the Batch page in *Administration*, click **Batch entry**. The Batch Entry page appears.
2. Select the Committed Batches tab.
3. In the **Committed batches** grid, select the batch to delete.

Note: You can limit the batches that appear in the **Committed batches** grid to those of a specific type of data. To filter the grid, click **Filter** and, in the **Category** and **Date Range** fields, select the category or date range by which to filter the batches. To display deleted batches in the grid, mark **Include deleted batches**. To view the batches that meet the specified filters, click **Apply**.

4. On the action bar of the grid, click **Delete**. A confirmation message appears.
5. Click **Yes**. You return to the Batch Entry page. To maintain the batch number, the deleted batch still appears on the Committed Batches tab. The **Status** column of the batch displays “Deleted.”

Batch Commit Status Page

When a batch is committed, the program automatically generates a commit status page for the batch. When the batch is committed to the database, the commit status page records and displays the settings selected when you run the commit process.

To access the commit status page of a batch, select the batch in the **Committed batches** grid and click **Committed** in the **Status** column.



Batch entry
Batch 1

Batch commit process parameters

Batch number:	1
Validate batch before committing:	No
Delete batch after committing:	No
Create exception batch:	No
Exception batch number:	<Next available batch number>
Create output selection:	No
Output selection name:	
Overwrite existing selection:	No

Batch commit status

Status:	Completed		
Status message:	Completed		
Started by:	BBNT\JustinWa	Server name:	INFINITYSERVER2
Started:	9/15/2010 1:49:19 PM	Total records processed:	0
Ended:	9/15/2010 1:49:20 PM	Number of exceptions:	0
Duration:	1 second	Records successfully processed:	0

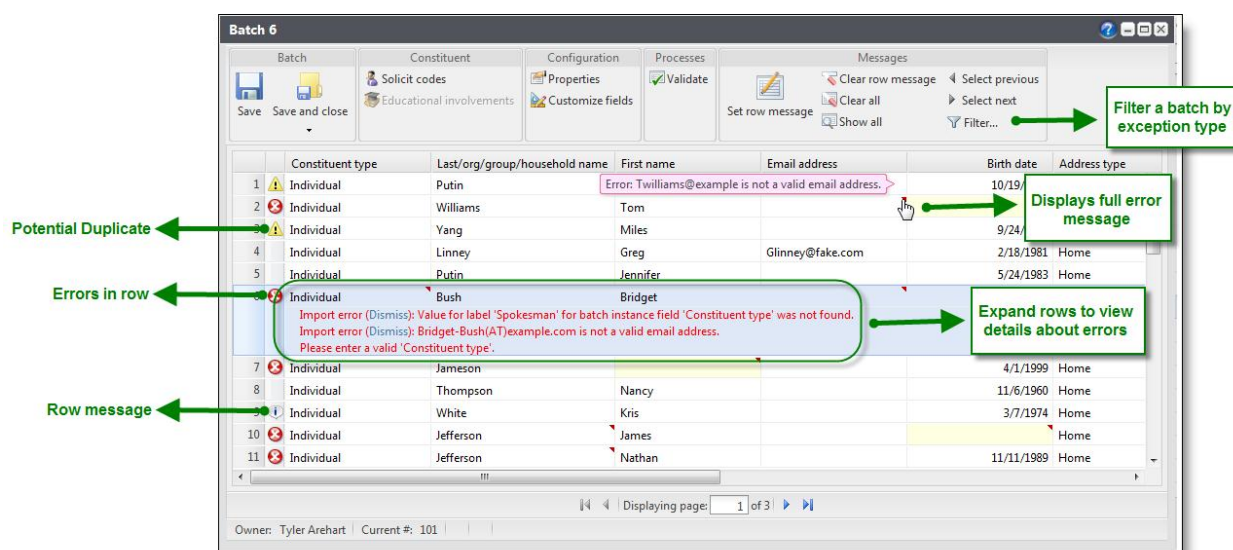
Note: To return to the Batch Entry page, you can click the **Batch entry** link at the top of the batch commit status page.

Under **Batch commit process parameters**, the parameters of the batch committal appear. This information includes the batch number, information about its output selection and exception batch, and whether to delete the batch after committal. You enter this information when you commit the batch to the database.

Under **Batch commit status**, information about the committal process appears. This information includes the status of the commit process, the start and end times of the commit process, the user who ran the commit process, the total number of records processed, and how many of those records did and did not successfully commit to the database.

Resolve Batch Exceptions

Batch exceptions are records in batches that cannot be validated or committed until you fix an issue. In an uncommitted batch, warning symbols appear next to rows that have issues.



If the row has an error such as a missing required field or a field in the wrong format, a red X appears. When you click the X, the row expands to display information about the each of the errors. A red triangle also appears in the top right corner of each field with an error. When you place your cursor over the triangle, the full error message appears. Once you correct an imported field error or missing required field, the grid updates automatically and removes those indicators. Indicators for other types of errors do not clear until you save or validate the batch.

To filter the batches grid by exception type, select **Messages, Filter** from the menu bar. After you select a filter, click **Apply**. The batch reloads and shows only records that have the specified error message.

A **Dismiss** option may appear for imported batches if errors are detected for unrequired fields. For example, this option appears if an unrequired field contains an invalid date format or a country not included in the **Countries and states** code table. You must resolve these errors before you can commit the row. You can correct the value in the field or select **Dismiss** to leave the field blank. If you have a lot of these types of errors, you should review your import settings. If the import settings are correct, the import file probably has poor quality data that the vendor must correct.

Note: To dismiss all errors, click **Clear all** on the grid toolbar.

If the record is a potential duplicate, a yellow caution symbol appears next to the row. When you click the caution symbol, the row expands to provide a link to the duplicate resolution screen. On this screen, you can view information about possible duplicates and decide whether to update the existing record or add a new record.

For more information about how to resolve duplicates in a batch, see [Resolve Duplicate Constituents in a Batch](#) on page 74

The grid also displays a white symbol with an 'i' for any row that has a message set. When you click on this symbol, the row expands to display the message. These are often reminders, such as to check the spelling of a name. You cannot commit the row until you clear the row message.

You can resolve errors at multiple points in the batch process. When you enter batches manually in *Batch entry*, the program flags simple errors as you enter data and more complex errors once you save the batch. Batch validation will catch any additional errors not already found. If you import batches and choose to validate but not commit, when you open the uncommitted batch, you can resolve errors and then commit. When you commit batches, you can select to create an exception batch which contains all records that do not commit to the database. You can open the exception batch, resolve any additional errors and then commit again. For more information about working with exception batches, see [Batch Exception Chain](#) on page 62

Batch Exception Chain

When you commit a batch, you can select to create an exception batch, which contains all records that do not commit to the database. From this exception batch, you can correct any errors that prevent the committal of records. After you correct the data, you can then commit the exception batch to automatically create or update the records in the database.

Note: During the commit process, when you select to create an exception batch for a membership dues batch, revenue batch, or an enhanced revenue batch, any unprocessed credit card transactions are added to the exception batch. After you ensure that each credit card transaction is correct, you must run a credit card processing process for the exception batch. You can then commit the exception batch to automatically create or update the records in the database. For more information about processing credit cards from the Credit card processing page in *Revenue*, see the *Revenue Guide*.

When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database. On the Batch Exception Chain page, you can view all batches related to a selected batch. To access the Batch Exception Chain page for a batch, select the batch on the Batch Entry page and click the batch number.

Batch number	Description	Owner	Status	Category
ER-5002	Exceptions from batch ER-5002	Joe McNamara	Committed	Revenue
ER-5002-EXCPT-1	Exceptions from batch ER-5002	Joe McNamara	Deleted	Revenue
ER-5002-EXCPT-2	Exceptions from batch ER-5002-EXCPT-1	Joe McNamara	Uncommitted	Revenue

The Batch Exception Chain page displays all batches related to the batch in order of their committal dates, with the original batch listed first. In the grid, the batch from which you access the exception chain appears in bold. For each batch, you can view its number, description, owner, category, and committal status.

From the grid, you can access the batch data entry screen to open a committed batch, such as to view its records and data. You can also view a control report or an exception report for a committed batch. The batch control report lists the records in the batch that were committed to the database and provides information about each record. The batch exception report contains information about the records that did not commit to the database and explains why each record did not commit. Batch Exception Report on page 180

For an uncommitted batch, you can access the batch data entry screen to correct data if necessary and ensure its committal. You can also view a validation report for an uncommitted revenue batch. The validation report lists each field you enter in a revenue batch, in the order they appear in the batch. In addition, the report includes other data entered for the transactions in the batch.

Batch Data Entry

After you add the batch in your database, you can edit it to update its data entry. You enter the information for each record on a separate row of the spreadsheet, or batch, on the data entry screen. The batch template used to create the batch defines the fields that appear on the data entry screen. There is no limit to the number of records you can enter in a batch. You can edit a batch only if its batch workflow status enables it. To edit a batch for data entry, select it and click **Edit**, **Edit batch** on the action bar of the grid.

Note: To open an editable batch for data entry, you can also double-click it in the **Uncommitted batches** grid.

Tip: To view the effectiveness of batch data entry for an application user, you can create a Batch Statistics key performance indicator (KPI). For information about this KPI, see [Batch Statistics Key Performance Indicator](#) on page 121.

Batch Data Entry Screen

On the data entry screen, you enter information about each record in a separate row of the batch. From this screen, you can perform various actions associated with *Batch entry*. The options on the batch data entry screen depend on the selected batch type.

To access the batch data entry screen, select the batch on the Uncommitted Batches tab of the Batch Entry page and click **Edit**, **Edit batch** on the action bar of the **Uncommitted batches** grid.

The screenshot shows the 'Batch 9' data entry screen. The interface includes a top toolbar with various action buttons like 'Save', 'Save and close', 'Solicit codes', 'Properties', 'Customize fields', 'Validate', 'Set row message', 'Clear row message', 'Clear all', 'Show all', 'Select previous', and 'Select next'. Below the toolbar is a data grid with the following columns: 'Constituent type', 'Last/org/group/household name', 'Address type', 'Country', and 'Address'. The first row of the grid is highlighted in yellow. At the bottom of the screen, a status bar displays 'Owner: Steve', 'Current #: 1', and 'Displaying page: 1 of 1'.

Note: If your organization integrates with **Blackbaud Internet Solutions**, you can also access the batch data entry screen from the Web Transactions page. On the Transactions tab, select the web batch to edit under **Uncommitted batches** and click **Edit batch** on the action bar.

- The toolbar and menu bar above the grid on the batch data entry screen contain buttons that represent common tasks related to data entry. The tasks that appear depend on the selected batch template. For information about the available tasks, see [Batch Data Entry Tasks](#) on page 67 and [Revenue Batch Data Entry Tasks](#) on page 83.
- If your organization integrates with **Blackbaud Internet Solutions**, you can download web transactions from **Blackbaud Internet Solutions** into uncommitted batches. In *Batch entry*, you can manage these batches and view the details of each transaction. For information about how to enter data in a web batch, see [Blackbaud Internet Solutions Integration Batch Data Entry Tasks](#) on page 116.
- If your organization integrates with a Microsoft *Exchange* server, you can download calendar items, email messages, and contact record updates from Microsoft *Outlook* into uncommitted batches. For information

about how to manage data in an *Exchange* integration batch, see *Microsoft Exchange Integration Batch Data Entry Tasks* on page 119.

- If your organization integrates with *MatchFinder Online*, you can download matching gift company information from *MatchFinder Online* into uncommitted batches. For information about how to manage data in a *MatchFinder Online* batch, see *MatchFinder Online Integration Batch Data Entry Tasks* on page 120.
- In the grid, you enter information about the records you enter into the batch. When you commit the batch, each row of the grid that contains information becomes a record. For more information about the batch data entry grid, see *Batch Data Entry Grid* on page 64.

Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), when you enter transactions in a revenue batch, you can enter full credit card numbers for pledges or recurring gifts only. When you enter a credit card number for a pledge or recurring gift and leave its row, only the last four digits of the credit card number appear in the row. When you save the revenue batch, the program sends the credit card numbers to the Blackbaud *Payment Service* for secure storage.

Note: To support data entry for credit card transactions processed externally, when you enter credit card numbers with four digits or fewer, other credit card information is not required.

- When you enter payment records in a revenue batch, the **Constituent Window** is available. The **Constituent Window** displays information about the constituent associated with the selected payment. For information about the **Constituent Window**, see *Constituent Window* on page 64.
- When you download email messages from Microsoft *Outlook* into an *Exchange* email batch, the **Message Detail Window** is available. The **Message Detail Window** displays information about the message, such as the content, constituent, and user name associated with the selected message. For information about the *Message Detail Window*, see *Message Detail Window* on page 66.

Batch Data Entry Grid

Within the batch data entry grid, you can quickly access information about each record, add and edit records, and attach row comments. We recommend you familiarize yourself with the menus and toolbars for the various batch types, as well as the keyboard shortcuts and function keys.

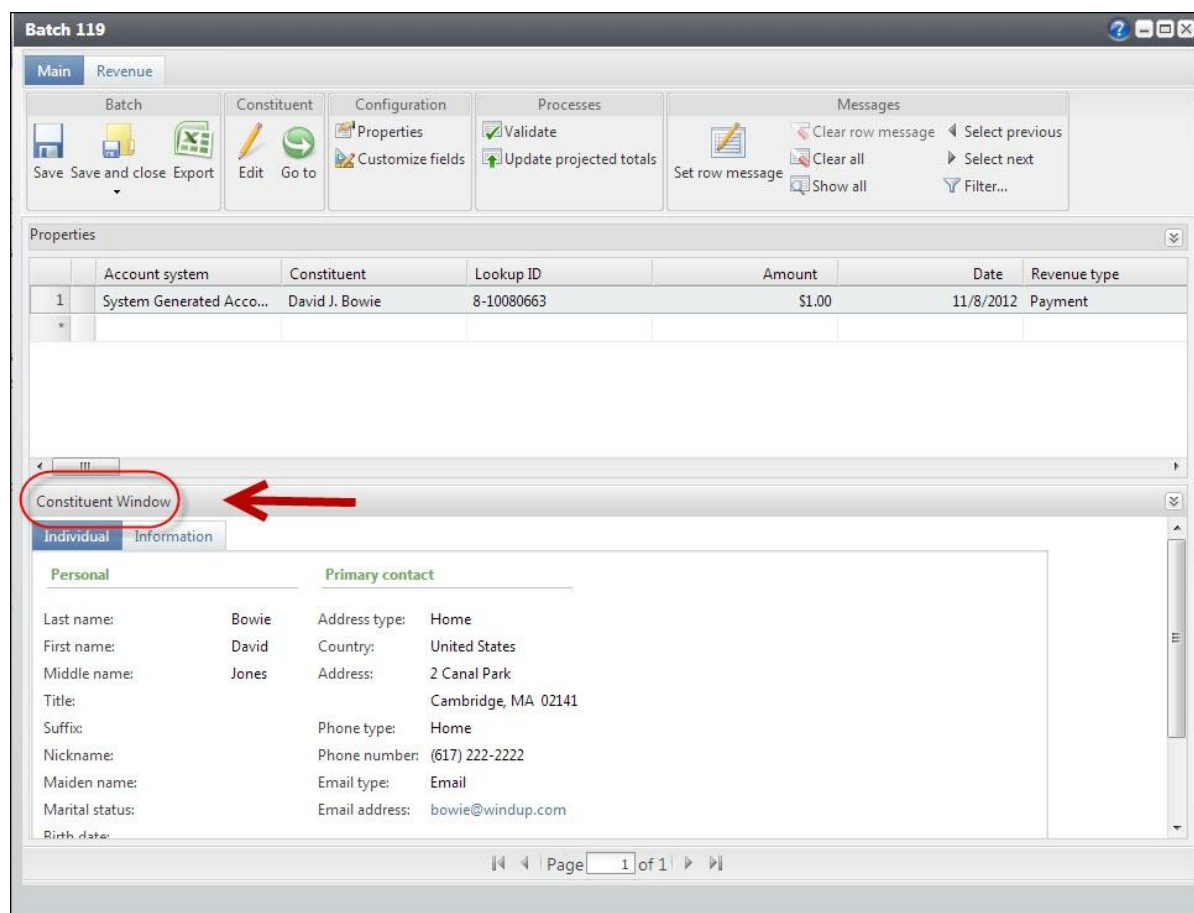
In the batch data entry grid, each row of the spreadsheet that contains information becomes or updates a record when you commit the batch to the database. The selected batch template defines which fields appear in the spreadsheet and the order in which they appear. When a column is not applicable to the record you enter, the field is locked. For example, in a constituent batch, some fields for an individual constituent, such as **Gender** or **Birth date**, are not applicable to an organization constituent. When you select “Organization” in the **Constituent type** field, the program locks all fields associated with individual constituents.

On a revenue batch data entry screen, you can review the properties of the batch, which include the processor, approver, projections, and running totals. You add these properties when you add the batch to the database. The program tracks the current number of contributions entered and automatically updates the current properties of the batch. To view the properties of a revenue batch, select **View, Show properties** on the menu bar.

Constituent Window

When you enter transactions in a revenue batch, the **Constituent Window** displays information about the constituent and applications associated with the selected transaction.

To view the **Constituent Window**, at the bottom of the grid, click **Constituent Window**.



Note: To view the record of a constituent included in a revenue batch, such as to edit additional information, press **F9** on your keyboard or select **Constituent, Go to Constituent** on the menu bar.

To help you navigate through this information, the **Constituent Window** contains multiple tabs.

- Constituent Information on page 65
- Information on page 66

You can resize, position, or hide the **Constituent Window** as necessary.

Constituent Information

To view information about the constituent associated with the revenue, select the Individual tab, Organization tab, Group tab, or Household tab, depending on the type of constituent. This tab displays data from the record of the constituent associated with the selected revenue transaction such as name and primary contact information. The other information that appears depends on the type of constituent. For example, for an individual constituent, you can also view the constituent's marital status and gender. For an organization constituent, you can also view the constituent's industry and parent organization. For a constituent group or household, you can also view information about its members.

Individual

Personal

Primary Contact

Last name:	Taylor	Address type:	Home
First name:	Bethany	Country:	United States
Middle name:	Margaret	Address:	8990 1 Treybrook Richmond, VA 23230
Title:	Miss	Phone type:	Home
Suffix:		Phone number:	804-556-0080
Nickname:	Beth	Email type:	
Maiden name:		Email address:	
Marital status:	Single		
Birth date:	09/15/1984		
Gender:	Female		

You can edit the constituent record information. For more information, see [Add or Update a Constituent Record](#) in a Revenue Batch.

Information

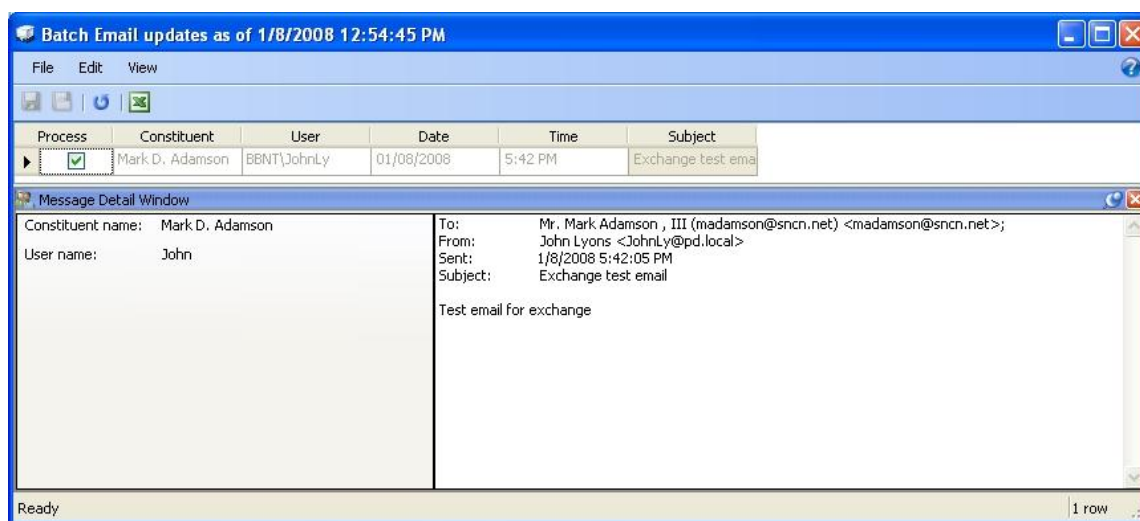
You can apply a payment to multiple applications. For example, a constituent may send a check to both pay for an event registration and donate a gift to your organization. To view information about the applications of a revenue transaction, select the **Information** tab. On this tab, you can view the applications associated with the transaction and the amount of the revenue applied to each. If the total of the application amounts exceeds the total amount of the transaction, the Balance (gift amount) application amount displays the difference in red.

Information

Applications		Matching gifts	
Application	Application amount	Organization	Amount
Donation	500.00		
Total:		Total:	0.00

Message Detail Window

When you download email messages from Microsoft *Outlook* into an *Exchange* email update batch, the **Message Detail Window** displays the content, constituent name, and user name for the selected message.



To hide or view the **Message Detail Window**, select **View, Show Message Detail Window** on the menu bar. You can adjust the size and position of the **Message Detail Window** as necessary.

- To resize the **Message Detail Window**, click and drag the top of the divider between it and the data entry grid.
- To separate the **Message Detail Window** from the batch data entry screen, right-click on the divider and select **Floating**. You can now move the **Message Detail Window** independent of the batch data entry screen.

To secure the **Message Detail Window** to the batch data entry screen, right-click on the divider and select **Floating** again.

- To hide the **Message Detail Window**, select **View, Show Message Detail Window** on the menu bar, or right-click on the divider and select **Hide**.
- To hide the **Message Detail Window** but keep it readily available, right-click on the divider and select **Auto-Hide**. To view the **Message Detail Window** when **Auto-Hide** is selected, move your cursor over the Message Detail Window tab at the bottom of the batch data entry screen. The **Message Detail Window** appears.

Batch Data Entry Tasks

The toolbar and menu bar above the grid on the batch data entry screen contain buttons that represent common tasks for batch data entry.

Delete a Row from the Batch Data Entry Grid

You can easily delete a row from the data entry grid of a batch. For example, you may need to delete a row because you accidentally enter the same record twice.

Note: When you delete a transaction from a **Blackbaud Internet Solutions** transaction batch and save the batch, **Blackbaud Internet Solutions** also deletes the transaction from its database.

► Delete a row from the data entry grid of a batch

1. On the batch data entry screen, select the rows to delete from the batch.
 - To select a single row, click the gray square to the left of the row in the data entry grid.
 - To select multiple rows, press **SHIFT** on the keyboard as you click the gray square to the left of each row; to select non-consecutive rows, press **CTRL** on the keyboard as you select each row.

2. Press **DELETE** on the keyboard. A message appears to confirm the deletion of the row(s).
3. Click **Yes**. You return to the batch data entry screen.

Note: To quickly delete the contents from a cell or row of the batch data entry grid, you can also press **Esc** on your keyboard. During data entry, press **Esc** once to delete the current field value. To delete the data remaining in the row, press **Esc** again.

Export Batch Data Entry

You can easily export data entered in a batch for use in Microsoft *Excel*, such as to do a quick spot check of the data you entered in the batch.

► Export batch data entry to a Microsoft Excel spreadsheet

1. On the batch data entry screen, select **File, Export** from the menu bar. The Save As screen appears.

Note: To export the batch data entry to Microsoft *Excel*, you can also click **Export** on the toolbar.

2. In the **Save in** field, browse and enter the location to save the export file.
3. In the **File name** field, enter a name to identify the export file.

Note: The **Save as type** field displays “Microsoft Office Excel Workbook (.xls).” You cannot export the batch data entry to any format other than for Microsoft *Excel*.

4. Click **Save**. The program saves the data in a Microsoft *Excel* spreadsheet at the specified location. You return to the batch data entry screen.

Add Solicit Codes in a Batch

Through a constituent batch, you can add solicit codes to constituent records. From the Solicit codes screen of a constituent batch, you can select a solicit code, start and end dates, and enter any relevant comments. You can also manage solicit codes on the Preferences tab of the constituent’s Communications page. For more information about adding constituent solicit codes outside of a constituent batch, see the *Constituents Guide*.

Solicit codes provide a convenient method to flag constituents as “exceptions to the rule” for your communications. These codes tell your organization when a constituent has certain rules to follow when you communicate. You can use these rules to exclude a constituent from a mailing process. Examples of solicit codes are “One solicitation annually,” “Spring mailing only,” “Do not email,” and “Do not phone on weekends.” To create solicit codes, click **Configuration** in the explorer bar of the *Communications* page.

► Add solicit codes in a batch

1. On the batch data entry screen, select **Constituent, Solicit codes** from the menu bar. The Solicit codes screen appears.

Note: To add solicit codes in a batch, you can also click **Solicit codes** on the toolbar.

Solicit code	Start date	End date	Comments
* End of year mailing only	01/05/2010	01/05/2011	
*			

2. In the **Solicit code** field, select the rule to assign to the constituent.
For example, if the constituent is not to receive email from your organization, select “Do not email.” When you run a communications process and select to exclude constituents with this solicit code, the program automatically removes the constituent from the process.
3. In the **Start date** field, enter the date the solicit code begins.
4. To assign the solicit code to the constituent only temporarily, in the **End date** field, enter the date the solicit code ends. If the solicit code does not have an end date, such as to permanently assign the solicit code to the constituent, leave this field blank.

Note: When you run a mailing process, the program uses only solicit codes that are valid as of the run date to exclude constituents from the process.

5. In the **Comments** field, enter any notes about the constituent’s solicit code as necessary.
6. Click **OK**. You return to the batch data entry screen.
Once you add solicit codes to a batch, you can return to the Solicit codes screen to edit solicit codes before committing the batch to the database.

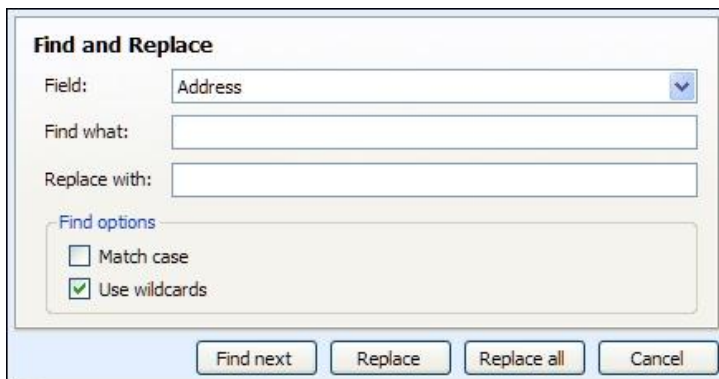
Find and Replace Field Values in a Batch

To search for and change field values in a batch, select **Edit, Find** from the menu bar. You can change one instance or globally change all instances of a value in a field to another value.

► Find and replace values in a batch

1. On the batch data entry screen, select **Edit, Find** on the menu bar. The Find and Replace screen appears.

Note: To access the Find and Replace screen, you can also press **CTRL + F** on the keyboard.



2. In the **Field** field, select the field associated with the column to update.
3. In the **Find what** field, select or enter the value to search for in the selected column.
4. In the **Replace with** field, select or enter the value to replace instances of the **Find what** value.
5. When you select to find and replace text values such as the **Address** field of a constituent batch, the **Find options** frame is enabled. Select whether the program should **Match case** or **Use wildcards** when it searches the selected column.
6. Click **Find next**. The program searches the selected column for the search value. When the program finds the search value, it highlights the instance in the column.
7. Select whether to replace the instance of the search value with the **Replace with** value.
 - To replace only the selected instance with the **Replace with** value, click **Replace**. To continue to search the selected column for the search value, click **Find next**.
 - To replace all instances of the search value in the selected column with the **Replace with** value at once, click **Replace all**.
8. When the program finishes its search, a message appears to ask whether to start the search again at the beginning of the batch.
9. To search the selected **Field** from the beginning, click **Yes**. Otherwise, click **No**.
10. When the program finds no instances of the search value in the selected **Field**, a message appears to inform you that the value is not found.
11. Click **OK**. You return to the Find and Replace screen.
12. To return to the batch data entry screen, click **Cancel**.

Find and Replace Screen

The table below explains the items on the Find and Replace screen. For information about how to access this screen, see Find and Replace Field Values in a Batch on page 69.

Note: To access the Find and Replace screen, you can also press **CTRL + F** on the keyboard.

Screen Item	Description
Field	Select the field of the data entry screen to search for the value to replace. When you access the Find and Replace screen, the column your cursor is in when you select Edit , Find from the menu bar automatically appears. If your cursor is not in a

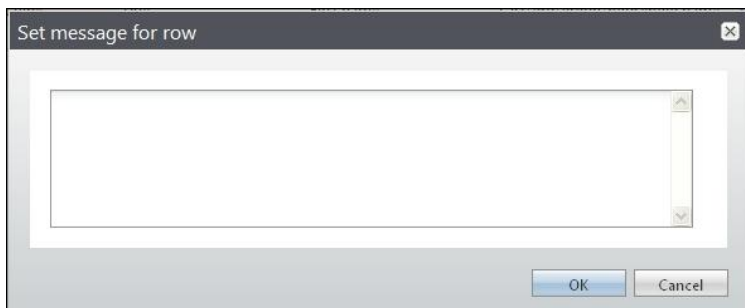
Screen Item	Description
	column, or if you cannot find and replace values in the selected column, the first field of the batch data entry screen appears. When you select a text value field such as Address , the Find options frame is enabled. For text values, you can select whether the program should Match case or Use wildcards when it searches the selected Field for the Find what value.
Find what	Select or enter the value to search for in the selected column.
Replace with	Enter the replacement value for instances of the Find what value in the selected column.
Find options	When you select to find and replace values in a text value field, this frame is enabled so you can specify how to search for text values in the selected column. To make the search case sensitive, for example, to search only for "South" and not "south," mark Match case . To use special characters to search for a value, mark Use wildcards . You can use wildcard characters in the Find what field in place of a specific character or series of characters. Wildcards are helpful when you are unsure of the spelling of a value or suspect a value is misspelled.

Set a Row Message

When you enter data into a batch, you can add a message for a particular row of the data entry grid. For example, an approver reviews a batch and notices a correction that needs to be made. The approver can set a message for the row with the error and send the batch back to the batch processor. The batch processor can use the row message to determine what to correct.

► Set a message for a row of batch data entry

1. On the batch data entry screen, select the row for which to add a message.
2. On the grid toolbar, select **Set message for row**. The Set message for row screen appears.



3. In the box, enter the message for the row.
4. Click **OK**. You return to the batch data entry screen. To review the row message, click the plus icon on the row. The row message displays below the selected row.

Note: You can remove a row message from a batch. For information about how to clear one or all row messages from a batch, see [Clear a Row Message](#) on page 71.

Clear a Row Message

You can remove a row message when it is no longer applicable. For example, the batch processor receives a batch with a row of data entry with a message set about a correction to make. Once the processor corrects the batch, she can remove the message from the row. You can remove each row message one at a time, or you can remove all row messages from a batch at once.

- To clear a message from a single row of batch data entry, select the row on the batch data entry screen and then press **CTRL + R** on the keyboard or select **Clear row message** from the grid toolbar.
- To clear all row messages from a batch data entry screen, select **Clear all** from the menu bar.

Customize the Fields in a Batch

You can customize the fields and default settings included in a batch template. You can adjust the fields and default settings when you first add the batch or during the batch data entry process.

When you create a batch template, you assign security permissions to customize fields within a batch based on system roles. If you do not have rights to customize fields within a batch, the **Available fields** frame is disabled, and you can only edit field defaults. For more information about batch template security, see *Add a Batch Template* on page 14.

► Customize the fields in a batch

1. On the batch data entry screen, select **Edit, Customize fields for batch** from the menu bar. The Customize fields for batch screen appears. For information about the items on this screen, see *Customize Fields For Batch Screen* on page 73.

Customize fields for batch

Available field options

- Address
- Change of address
- Change of address CART
- Change of address city
- Change of address DPC
- Change of address LOT
- Change of address state
- Change of address ZIP
- City
- Constituent
- Move type
- NCOA DMA suppression
- NCOA DPV footnote
- NCOA footnote
- NCOA mail grade
- NCOA move date
- NCOA return code
- Standardized address
- Standardized CART
- Standardized city
- Standardized DPC
- Standardized LOT
- Standardized state
- Standardized ZIP
- State

Selected fields	Default value	Hidden	Required	Locked
Constituent				
Address				
City				
State				
ZIP				
Standardized address				
Standardized city				
Standardized state				
Standardized ZIP				
Standardized DPC				
Standardized CART				
Standardized LOT				
Change of address				
Change of address city				

Field defaults

Constituent:

☐ Hidden

☐ Required

Save **Cancel**

Note: You can also access the Customize fields for batch screen when you first add the batch to the database. On the Add a batch screen, in the **Batch template** field, select the batch template to customize and click **Field options**.

2. To change the default settings of a field in the batch, select the field in the **Selected fields** grid and, in the **Field defaults** frame, select its default setting.
3. Add or remove fields in the batch or adjust the order of the fields in the batch as necessary.

- To add a field to the batch, select the field in the **Available Fields** box and click the right arrow button. The field appears in the **Selected Fields** grid. To set a default setting for the field, select it in the grid and, in the **Field defaults** frame, select its default setting.
- To remove a field from the batch, select the field in the **Selected Fields** grid and click the left arrow button. The field is enabled in the **Available Fields** box and no longer appears in the **Selected Fields** grid.
- To adjust the order of new or existing fields in the batch, select the field to move in the **Selected Fields** grid and click the up or down arrow button.

Note: If your organization configures multiple general ledger account systems and implements site security, the **Account system** field appears as an available field. To ensure transactions post to the same account system, we strongly recommend you select a default account system and hide the **Account system** field. If you do not select a default, the account system assigned to you is used. If a default is not assigned to you, the account system with the earliest creation date to which you have rights is used.

4. Click **Save**. You return to the batch data entry screen.

Customize Fields For Batch Screen

The table below explains the items on the Customize fields for batch screen. When you create a batch template, you assign security permissions to customize fields within a batch based on system roles. If you do not have rights to customize fields within a batch, the **Available fields** frame is disabled, and you can only edit field defaults. For more information about how to access this screen, see [Customize the Fields in a Batch](#) on page 72.

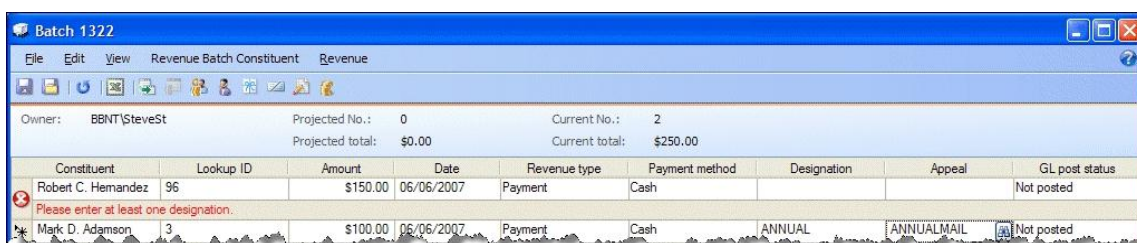
Screen Item	Description
Available Fields	The Available Fields box lists all fields available to include in the selected batch template. When a + symbol appears next to an entry in the Available Fields box, you can click the + symbol to see the field names grouped under the heading.
Selected Fields	<p>The Selected Fields grid displays the fields to appear as columns on the data entry screen of the batch. The grid also displays the default value for the field and whether the field is hidden or required in the batch.</p> <p>To add a field to the Selected Fields grid, select the field in the Available Fields box, and click the right arrow. When an item appears in the Selected Fields box, it is disabled in the Available Fields box.</p> <p>To remove a field from the Selected Fields grid, select the field in the grid and click the left arrow.</p> <p>The order the fields appear in the Selected Fields grid is the same order they appear on the data entry screen. To change the order of the fields in the Selected Fields, select the field in the grid and click the up or down arrow button to move it up or down the list.</p>
Field defaults	<p>You can assign a specific default value to a selected field or checkbox. Your selections in the Field defaults frame appear as a default for each entry of the field or checkbox in the batch. Defaults are guidelines you set up to simplify data entry. For example, if you create a revenue batch to track only cash payments, select the Payment method field in the Selected Fields grid and select “Cash” in the Payment method field in the Field defaults frame. Every time you add a new payment record to the batch, “Cash” automatically appears as the payment method.</p> <p>When you set a default value for a field or checkbox and do not expect its value to change for any record in the batch, you can hide the field or checkbox. A hidden field or checkbox does not appear on the data entry screen of the batch. To hide a field or checkbox, select it in the Selected Fields box and mark Hidden in the Field defaults frame.</p> <p>To make a field or checkbox required, select it in the Selected Fields grid and mark Required in the Field defaults frame. Some fields are automatically marked as Required, as specified by the selected batch type. When a field is required by the selected batch type, you cannot unmark its Required settings.</p>

Validate a Batch

When you validate a batch, the program examines all the information entered in the batch to determine whether data entry errors exist. Before you update the status of a batch, we recommend you validate the batch to locate any data entry errors. When the program finishes its batch validation, a message appears to tell you the results of the validation. For each data entry error found, an exception is created and appears on the batch data entry screen. To submit or approve the batch without difficulty, correct any exceptions found.

► Validate the data entry of a batch

1. On the batch data entry screen, select **Edit, Validate batch** from the menu bar. The program automatically searches the data entry for exceptions. When the validation is complete, a message appears to inform you of the validation results.
2. Click **OK**. You return to the batch data entry screen. If the program finds exceptions, a description of the exception appears under the row of the applicable payment record in the grid.



Note: For a constituent or revenue batch, the validation checks data about new constituents in the batch to verify the constituents are not already in your database. If the validation finds a possible duplicate constituent, a duplicate message appears under the constituent in the grid. To view information about the possible duplicate, click the message. For information about the duplicate record check, see *Resolve Duplicate Constituents in a Batch* on page 74.

3. Update the batch data entry as necessary to resolve the exceptions. For more information about how to resolve exceptions, see *Resolve Batch Exceptions* on page 60.

Resolve Duplicate Constituents in a Batch

When you validate a constituent or revenue batch, the program automatically runs a duplicate check to find any existing constituents that may match constituents in the batch. If the match confidence score for a pair of constituents falls within the range defined for possible matches, the program flags the incoming record as a potential duplicate and displays an exception in the batch data entry grid. To view information about the possible duplicate, click the message and use the duplicate resolution screen to decide whether to update the existing constituent or add a new constituent record.

► Resolve duplicates in a Constituent Update or Enhanced Revenue batch

Note: The Possible duplicate matches screen appears for Constituent Update and Enhanced Revenue batch types. The Duplicate record check screen appears for Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches. For more information about the Duplicate record check screen, see *Resolve duplicate constituents in Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches* on page 77.

1. From a validated batch that contains exceptions, find a row in the grid with a yellow caution symbol. Click the symbol and a duplicate records message appears under the row.

Note: If an incoming constituent is similar enough to an existing constituent to qualify for an automatic update (their match confidence score is above the top matching threshold), but your organization's constituent update rules require manual review for certain fields, the batch generates an exception that requires you to review the incoming fields and manually select which action to take. For information about constituent update rules, see the *Administration Guide*.

Batch 91

	Account system	Constituent	Lookup ID	Amount	Date	Revenue type	Payment method	Application	Designation	GL post status
1	System Generated Acco...	Alex A. Smart	8-10000998	\$100.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
2	System Generated Acco...	Alexander A. Sma		\$200.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
3	System Generated Acco...	Al Smartovich		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
4	System Generated Acco...	Alan Sm		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
5	System Generated Acco...	Ala Sma		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
6	System Generated Acco...	Als T. Sma		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
7	System Generated Acco...	El A. Sm		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted
8	System Generated Acco...	Bobby Po		\$300.00	12/16/2011	Payment	Cash	Donation	2000ANNUAL	Not posted

- Click the message. The Possible duplicate matches screen appears.

Possible duplicate matches for Alexander Sma

New constituent record	Best possible match (92%)	6 potential matches found
Batch 91 created on 2/16/2012 <input type="button" value="Add this as a new record"/>	Created: 12/16/2011; Last updated: 2/24/2012 <input type="button" value="Confirm this record as a match"/>	
Name: title Alexander A Sma suffix Date of birth: 1/1/1985 Address: 1 Smart st. Boston MA 12345-1111 Email: sma@gmail.com Phone: (617) 888-5555	Name: title Alex A Smart suffix Date of birth: 1/1/1975 Primary address: 1 Smart st. Boston MA 12345 Primary email: smart@gmail.com Primary phone: (123) 456-7899	92% Alex A. Smart Lookup ID: 8-10000998 1 Smart st. Boston, MA 12345 78% Alex S. Sm Lookup ID: 8-10001001 1 Smart road boston, MA 12345 71% Alexander S. Smartov Lookup ID: 8-10001040 1 smartov st. boston, MA 12345 56% Alam Smar Lookup ID: 8-10001019 1 Smar st. boston, MA 12345

Help Skip Cancel

The **Incoming constituent data** column displays information from the new record.

The **Potential Matches** column on the right lists all existing constituents in the database that are possible matches, ranked from the highest to lowest match confidence score. The percentage represents the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about the match confidence score, see the *Administration Guide*.

When you select a constituent in the **Potential matches** column, its information appears in the middle column so you can compare the incoming and existing records side-by-side. Black fields are exact matches. Red fields are similar but need careful review. After you compare the records, you can do one of the following:

- If you decide the incoming constituent is not a duplicate, click **Add this as a new record**. The screen displays the name and contact information for the new record. Click **Save** to create a new record, or if you change your mind, you can click **Don't add this as a new record** to return to the previous screen.

- If you decide the incoming constituent matches an existing constituent, click **Confirm this record as a match**. Additional options appear. You can evaluate each red field and decide what to do with the incoming data: If you select to add or update a field, it appears green in the existing constituent column. If you select to ignore a field, it appears stricken through in the incoming constituent column.

***screenshot

- To discard all new or conflicting data from the incoming constituent, click **Ignore all**.
- To automatically apply the constituent update rules set on the Global data entry page of *Administration*, click **Use my organization's rules**. For example, if you have **Add incoming phone number as new phone number** set as a rule, when you click **Use my organization's rules**, the program automatically adds the incoming phone number to the existing record. If your update rules require manual review for certain fields, you must review those incoming fields and manually select which action to take. As a reference, your organization's selected update rules appear in the **Tips** column. For information about constituent update rules, see the *Administration Guide*.
- To add the name as an alias to the existing constituent, click **Add as alias**. To add the address, email, or phone number as primary or secondary on the existing constituent (rather than replace the existing value), click **Add** and select **Add as primary** or **Add as secondary**. If the incoming

constituent has information that is blank on the existing constituent, you can click **Add** to add that data to the existing record.

- d. To discard the incoming value (neither add a new value nor update the existing value), click **Ignore**.
- e. To replace the existing name, address, email, or phone number with the incoming value, click **Update existing** and select whether to update all fields or to select individual fields to update. If you select **Update all name/address/email/phone number fields**, the program moves all fields of that type to the existing constituent. If you select **Select fields to update**, the **Ignore** and **Update current** options appear so you can handle each field individually.

Possible duplicate matches for Alexander Sma

New constituent record		Best possible match (92%)	
Batch 91 created on 2/16/2012		Created: 12/16/2011; Last updated: 2/24/2012	
Actions: Undo all This record is not a match			
Name:	Add as alias Ignore Replace	Name:	Info
title		title	
Alexander	Ignore Replace	Alex	
A		A	
Sma	Undo	Smart	
suffix		suffix	
Date of birth:	Ignore Replace	Date of birth:	Info
1/1/1985		1/1/1975	
Address:	Add as secondary Ignore Replace	Primary address:	Info
1 Smart st.		1 Smart st.	
Boston		Boston	
MA		MA	
12345-1111	Ignore Replace	12345	
Email:	Add as secondary Ignore Replace	Primary email:	Info
sma@gmail.com		smart@gmail.com	
Phone:	Add as secondary Undo	Primary phone:	Info
(617) 888-5555		(123) 456-7899	

Tips

Before you save, you can use the Ignore, Add and Replace links on the left to choose how to update the matching constituent.

If you decide this record is not a match, you can go back to browsing possible matches at any time.

☒ Automatically go to the next duplicate exception

Help Save Cancel

3. Click **Save** to save your changes to the existing record, or if you change your mind, you can click **View other potential matches** to return to the previous screen.

Note: If you select **Automatically go to the next duplicate exception**, the program automatically opens the next record in the batch with possible matches when you click **Save**.

Note: For Enhanced Revenue batches, the constituent is updated automatically when you click **Save**.

4. Click **Save and close** to save the batch and return to the Uncommitted batches tab.

Note: For Constituent Update batches, the program updates existing constituents with changes when you commit the batch.

► Resolve duplicate constituents in Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches

1. On the batch data entry screen, click **Validate** under Processes.

Note: The duplicate record check screen appears for Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches.

If the validation finds a possible duplicate constituent, “This constituent might be a duplicate” appears under the constituent in the grid.



2. Click the message. The Duplicate record check screen appears.



The box displays the information entered for a new constituent in the batch. The grid displays information about possible duplicate constituents found in your database. In the grid, the **% Match** column displays the likelihood that the constituent from the database is the constituent entered in the batch.

3. To determine whether the constituent entered in the batch is already in your database, compare the constituent information from the batch with the information about the possible duplicate constituents.
 - To replace the new constituent in the batch with a constituent in the database, select the constituent in the grid and click **Replace with selected constituent**. You return to the batch data entry screen.
 - To keep the new constituent information in the batch, click **Ignore**. You return to the batch data entry screen. The program flags the constituent as a new constituent so it does not include the constituent information if you validate the batch again.
 - To neither replace nor ignore the constituent information, such as if you require additional research before you decide whether the constituent is a duplicate, click **Cancel**. You return to the batch data entry screen.

Freeze and Unfreeze Columns in the Batch Data Entry Grid

To lock and unlock a selected column and all columns to its left, use the **Freeze column** and **Unfreeze column** menu options. For example, in a constituent batch, you can freeze the **Last/organization name** column so you can always view the names of the constituents for which you add information. When you freeze a column, it remains stationary and visible, regardless of the horizontal direction you scroll. When you unfreeze a column, the columns move to the left or right, according to the horizontal direction you scroll.

► Freeze and unfreeze a column in the batch data entry grid

1. On the batch data entry screen, put your cursor in the right-most column to freeze. For example, to freeze the first three columns of the batch data entry grid, select a row in the third column.
2. On the menu bar, select **View, Freeze column**. When you use the horizontal scroll bar, the selected column and all columns to its left remain stationary. To indicate that a column is frozen, its header appears in blue.
3. To unfreeze the columns in the batch data entry grid, select **View, Unfreeze column** on the menu bar. When you use the horizontal scroll bar, the columns move to the left or right accordingly.

Look Up a Zip code in a Constituent or Constituent Address Update Batch

With Zip code Lookup, you can search for the Zip code of an area when you enter address information in a constituent or constituent address update batch. If an area has multiple Zip codes, the Zip code Search screen appears so you can select the correct code. When you look up a Zip code, you easily ensure correct data entry.

Note: To enable Zip code Lookup, your system administrator must first configure it in *Administration*. For information about how to configure the Zip code Lookup feature, see the *Administration Guide*.

► Look up a Zip code for an address in constituent information

1. On the batch data entry screen of a constituent or constituent address update batch, select the row for which to look up a Zip code. Verify the **ZIP** field of the constituent is blank.
2. In the **City** and **State** fields, enter the applicable address information.
3. On the menu bar, select **Address, Zip code Lookup**.

Note: To look up the Zip code of a selected address on the batch data entry screen, you can also click **Lookup Zip code** on the toolbar or press **CTRL + D** on your keyboard.

- If the area entered has only one Zip code, the program automatically enters the correct code in the **ZIP** field of the selected row.
- If the area entered has multiple Zip codes, the Zip code Search screen appears. In the **Results** grid, the Zip codes that match the city and state entered appear. Select the correct Zip code and click **Select**. You return to the batch data entry screen. In the **ZIP** field, the selected Zip code appears.

Validate Addresses in a Batch

With *Address Validation*, you can verify the address information entered in a constituent batch, constituent address update batch, constituent update batch, revenue batch, or enhanced revenue batch is correct. Address validation verifies the addresses you enter exist and are entered correctly. When you validate an address, the program updates missing or incomplete information such as Zip codes, standardizes street addresses, and updates the addresses with Coding Accuracy Support System (CASS) certified information.

Note: Address Validation provides CASS certification through Satori Software, Inc., an official CASS certification agent. To enable *Address Validation*, your system administrator must first configure it in *Data Tune-up*. For information about how to configure *Address Validation*, see the *Administration Guide*.

► **Validate an address in the current row**

1. For a constituent or constituent address update batch, select the row with the address to validate on the batch data entry screen. Verify the address fields contain information to validate, and select **Edit, Validate address (current row)** from the menu bar. The program validates the address to make sure it is correct and contains complete information.

Note: To validate a selected address on the data entry screen of a constituent batch or constituent update batch, you can also click **Validation address (current row)** on the toolbar or press **CTRL + F8** on your keyboard.

For a revenue batch, select the row with the address to validate on the batch data entry screen and select **Constituent, Edit Constituent** from the menu bar. On the Edit constituent screen, verify the address fields contain information to validate and click **Validate**. The program validates the address to make sure it is correct and contains complete information.

2. If the address can be validated, the program standardizes the address, corrects any misspelled words, and updates it with missing information, such as the ZIP+4 code.

If the selected address cannot be validated, such as if you enter an incorrect address that contains multiple possible matches, a message appears to ask whether to search for the correct address. Search for and update the address with valid information.

- a. Click **Yes**. The address validation screen appears.

Address: 200 Danie Isl Drive

City: Charleston

State: SC ZIP: 294

Search Clear

Results

Select a street:

- Daniel St
- Daniel Ellis Dr
- Daniel Island Dr

Address ranges for selected

Primary range	Unit type	Secondary range	ZIP+4	Business name	Address t
1900 - 1998 (even)			29492-7546		Street
2000 - 2098 (even)			29492-7540		Street
2000			29492-7541	Blackbaud Inc	Firm
2200 - 2216 (even)			29492-7948		Street
2201 - 2213 (odd)			29492-7592		Street
2215 - 2221 (odd)			29492-7951		Street
2218 - 2230 (even)			29492-7593		Street
2232 - 2250 (odd)			29492-7952		Street

Validate Cancel

- b. At the top of the screen, the address information entered on the batch data entry screen appears. Verify the address fields are complete.
- c. Click **Search**. Under **Results**, information about the possible addresses that match the entered criteria appear.
- d. In the **Select a street** box, the possible street names that match the entered criteria appear. If the results return multiple street names, such as if the address entered is misspelled, select the street name you think is correct.

► Validate addresses in all rows

1. For a constituent batch, constituent address update batch, constituent update batch, revenue batch, or enhanced revenue batch, verify the address fields contain information to validate, and select **Edit, Validate addresses (all rows)** from the menu bar. The program validates the addresses to make sure they are correct and contain complete information.
2. If the addresses can be validated, the program standardizes the addresses, corrects any misspelled words, and updates them with missing information, such as the ZIP+4 code.

If addresses cannot be validated, such as if you enter an incorrect address that contains multiple possible matches, an address validation error message appears under a batch row giving a brief description of the error.

- a. To search for and update the address with valid information, click the error message to access the address validation screen. The address validation screen appears.

Address: 200 Daniel Isl Drive

City: Charleston

State: SC ZIP: 294

Search Clear

Results

Select a street:

- Daniel St
- Daniel Ellis Dr
- Daniel Island Dr

Primary range	Unit type	Secondary range	ZIP+4	Business name	Address type
1900 - 1998 (even)			29492-7546		Street
2000 - 2098 (even)			29492-7540		Street
2000			29492-7541	Blackbaud Inc	Firm
2200 - 2216 (even)			29492-7948		Street
2201 - 2213 (odd)			29492-7592		Street
2215 - 2221 (odd)			29492-7951		Street
2218 - 2230 (even)			29492-7593		Street
2232 - 2240 (even)			29492-7593		Street

Validate Cancel

- b. At the top of the screen, the address information entered on the batch data entry screen appears. Verify the address fields are complete.
- c. Click **Search**. Under **Results**, information about the possible addresses that match the entered criteria appear.
- d. In the **Select a street** box, the possible street names that match the entered criteria appear. If the results return multiple street names, such as if the address entered is misspelled, select the street name you think is correct.
- e. In the **Address ranges for selected** grid, the address ranges for the selected street appear. Use this information to find or determine the correct street address. At the top of the screen, update the **Address** field as necessary.

Change Constituent in a Revenue Update Batch

In the batch grid, you can edit the constituent that loads with a selected payment — pledge, recurring gift (except a sponsorship recurring gift), payment. In addition, if you change the constituent, you can select to reload recognition credits and solicitors by selecting the **Reload recognition credit** and **Reload solicitor** checkboxes that appear in the batch grid.

Note: If you select to reload the recognition credit and/or the solicitor, the reload occurs when you commit the batch.

Direct Debit Return Rejections

The Direct Debit Return file you receive from your financial institution contains information about direct debit payments submitted for deposit. If the file contains a result code that matches a rejection code entered for the financial institution in *Constituents*, the program automatically matches the entry to the corresponding revenue record and marks the entry as rejected. The **Is rejected** checkbox in the Enhanced Revenue batch grid indicates which payments have been rejected. If you defined a default reason code for direct debit rejections, this code automatically appears in the **Adjustment reason** column. Otherwise, you can manually select a reason code for each rejected payment before you commit the batch.

When you commit a Direct Debit Return batch that contains rejections, the status of the matching revenue determines what occurs. If the rejected payments are currently in a revenue batch that has not been committed, these payment do not post. Instead, they appear in a batch exception report. If the revenue batch has been committed but has not yet been posted to the General Ledger, the program changes the amount and GL distributions on the revenue record to zero, adds **Direct debit deposit is rejected** to the **Payment method** section of the record, and displays the rejection's result code. If the revenue batch has been committed and the transactions posted to the General Ledger, the program updates the post status on the revenue record to "Posted (Adjustment pending)," changes the GL distributions to zero, and adds a **GL unposted adjustments** section to the GL Distributions tab. This section displays the reversals applied to the revenue record as a result of the rejection.

Note: If the revenue that matches the rejected transaction in a Direct Debit Return file has been posted to the General Ledger, you must select a reason code in the **Adjustment reason** column of the Direct Debit Return batch file before you can commit the batch. If you previously selected a default reason code for rejections, this code automatically appears in the column.

For information about how to define rejection codes for financial institutions, see the *Constituents Guide*. For information about how to add a default reason code for direct debit rejections, see the Administration Guide.

Revenue Batch Data Entry Tasks

When you enter data in a revenue batch, the toolbar on the data entry screen contains several additional buttons that represent common tasks for revenue batch entry. You may also access batch data entry tasks from the menu bar.

Update the Projected Totals of a Revenue Batch

When you add a revenue batch, you can enter a projected number of transactions and a projected monetary total of those transactions. While these projections are not required, we recommend you enter these values to help validate the data entered in the batch. If, as you enter data in the batch, you determine the entered projections are not accurate, you can update the projections to match the current data entered in the batch.

On the revenue batch data entry screen, select **Edit, Update projected totals** from the menu bar. The program updates the **Projected No.** and **Projected total** fields to match the **Current No.** and **Current total** fields and displays a message to inform you of the change. To return to the data entry screen, click **OK**.

Select a Revenue Record for a Revenue Update Batch

When entering information for a revenue update batch, in the batch grid, you must identify the revenue record to which you want to apply updates. This is done through the **Revenue** column that appears in the grid.

► Select revenue record to update in a Revenue Update Batch

1. On the revenue update batch data entry screen, click the search icon in the **Revenue** column. The Revenue Update Batch Search screen appears.
2. Enter your search criteria. For an explanation of the criteria options, see Revenue Update Batch Screen on page 84.
3. Click **Search**. All results matching your criteria display in the **Results** grid.
4. Select the revenue record you want to update and click **Select**.

Revenue Update Batch Screen

Screen Item	Description
Last/Org/Group name	To search for revenue from an individual constituent, enter the constituent's last name. To search for revenue from an organization constituent, enter the organization's name. To search for revenue from a constituent group or household, enter the name of the group or household. If you are unsure of how to spell a name, enter the first few characters or letters.
First name	To search for revenue from an individual constituent, enter the constituent's first name. If you are unsure of how to spell the constituent's name, enter the first few characters or letters.
Lookup ID	To search for revenue from a constituent, enter the constituent's lookup ID.
Receipt number	To search for revenue that has already been receipted, you can search by its receipt number. The program generates receipt numbers automatically when you run a receipt process and stores the receipt number on the revenue record.
Revenue ID	To search for revenue based on a known Revenue ID number, enter the number here.
Match all criteria exactly	To display only results that match the search criteria entered exactly, select this checkbox. When you select this checkbox, a revenue record does not appear in the Results grid if it does not match the criteria exactly.
Date	To search for revenue by the date it entered your database, select the date from the calendar.
Transaction type	To search for revenue by the transaction type, select the desired type such as Payment, Pledge, or Recurring gift.
Revenue type	You can search for a specific transaction by selecting the type of revenue generated by the transaction.
Payment method	To search for revenue by how the constituent paid the revenue, select the method of payment.

Screen Item	Description
Search in	When you click Show advanced search options , this field appears. Select the types of constituents to include when you search for revenue.
Check nickname	When you click Show advanced search options , this checkbox appears. To search nicknames to find revenue from a constituent, select this checkbox. For example, if you enter a First name of “Charlie” and select this checkbox, revenue from constituents with a first name or nickname of Charlie appear in the Results grid.
Check aliases	When you click Show advanced search options , this checkbox appears. To search aliases to find revenue from a constituent, select this checkbox. For example, if you enter a First name of “Charlie” and select this checkbox, revenue from constituents with a first name or an alias of Charlie appear in the Results grid.
Include inactive	When you click Show advanced search options , this checkbox appears. To include inactive constituents when you search for revenue, select this checkbox. When you select this checkbox, revenue from inactive constituents that match the criteria entered appear in the Results grid.
Check alternate lookup IDs	When you click Show advanced search options , this checkbox appears. To include alternate lookup IDs for constituents when you search for revenue, select this checkbox. When you select this checkbox, revenue from constituents with alternate lookup IDs that match the criteria entered in the Lookup ID field appear in the Results grid.
Only search primary addresses	When you click Show advanced search options , this checkbox appears. To include only the primary addresses from the Contact tab of the constituent records when you search for revenue, select this checkbox and enter the primary address information in the address fields.
Include deceased	When you click Show advanced search options , this checkbox appears. To include deceased constituents when you search for revenue, select this checkbox. When you select this checkbox, revenue from deceased constituents that match the criteria entered appear in the Results grid.
Results	Once you enter your revenue criteria and click Search , the revenue records that meet the criteria appear in the grid. If more than 100 records match the criteria entered, only the first 100 records appear. To view a revenue record, select it in the grid and click Select on the action bar.

Apply a Payment in a Revenue Batch to Outstanding Commitments

Constituents can use any payment method to pay outstanding pledges, recurring gifts, event registrations. When you add a constituent’s payment in a revenue batch, you can apply it to an outstanding commitment, such as a pledge or recurring gift. When you add a payment to the batch for a constituent who has outstanding commitments, the program automatically attempts to apply the payment to a commitment of the same revenue amount. In the **Application** column, you can select which commitment to pay.

Constituents can make payments toward their own commitments or toward commitments made by other constituents. For example, Georgia Thomas pledges \$100 to your organization. Because of a change in her financial situation, she can no longer pay the pledge. Georgia’s aunt, Lisa Haas, is also a constituent in your database and agrees to pay Georgia’s pledge. When you add the payment record, you make it in Lisa’s name and apply it the balance of Georgia’s commitment.

To apply a payment in a batch to multiple commitments of the constituent or on behalf of other constituents, you can select the **Apply to commitments** option from the **Revenue** menu.

► Apply a payment in a batch to an outstanding commitment

1. On the revenue batch data entry screen, select the payment to apply to an outstanding commitment.

2. On the menu bar, select **Revenue, Apply to commitments**. The Apply to commitments screen appears. The grid displays the outstanding commitments for the constituent. The second grid on this screen is altered slightly if the commitment is associated with a sponsorship.

On the Apply to commitments screen in an enhanced revenue batch, the program displays all commitments regardless of their association with the account system you select for a batch row. An account system not associated with a commitment still appears but is disabled.

Note: To access the Apply to commitments screen, you can also press **CTRL + A** on the keyboard or click **Apply to commitments** on the toolbar.

3. In the **Payment amount** field, the total sum of the payment appears. If necessary, enter the total sum of the payment.

Note: When recording a payment in an enhanced revenue or revenue update batch, the **Apply by** options appear at the top of the screen. These options allow you to select how you want revenue applied: by **Amount** or **Percent**. If you select **Amount**, the amount allocated displays in the **Applied amount** column of the grid; if you select **Percent**, the percent allocated displays in the **Applied percent** column of the grid.

Note: On the Apply to commitments screen for an enhanced revenue batch, a green arrow appears next to a payment that has been applied to an outstanding commitment.

4. Add new commitments as necessary.

- To add an unapplied matching gift claim for an organization constituent, such as if the organization sends a payment for a matching gift claim that is not yet in the database, click **Add** and select **Unapplied MG** on the action bar. The Record an unapplied matching gift screen appears so you can specify the amount to apply to the matching gift and to which designation.

For information about matching gifts and the Record an unapplied matching gift screen, see the *Revenue Guide*.

- To add a pledge for the payment, such as if the constituent sends a payment for a pledge that is not yet in the database, click **Add** and select **Pledge** on the action bar. The Add a pledge screen appears so you can add the pledge.

For information about pledges and the Add a pledge screen, see the *Revenue Guide*.

- To add an event registration for the payment, such as if the constituent sends a payment for a registration that is not yet in the database, click **Add** and select **Event registration** on the action bar. After you search for and select the event for which to register the constituent, the Add a registrant screen appears.

Note: When you first add an event registration in a batch, the Event Search screen appears so you can select the event. For subsequent new event registrations in the batch, the Event Selection screen appears and displays the previous selected event. To add a registration for the same event, click **OK**. To use a different event, click the binoculars to search for the event and click **OK**.

For information about event registration and the Add a registrant screen, see the *Events Guide*.

After you add the commitment, you return to the Apply to commitments screen. In the grid, the new outstanding commitment appears.

Note: Once you add a commitment such as a pledge or event registration on the Apply to commitments screen, you can edit the commitment. To adjust the commitment, select it in the grid and click **Edit** on the action bar. In an enhanced revenue batch, you can edit existing pledge commitments. To edit an existing pledge, select it in the grid and click **Edit** on the action bar. Once you save the pledge, your changes are immediately applied to the pledge record in the database.

Warning: If you add a commitment such as a membership or an event registration for a revenue transaction and later edit the constituent associated with the transaction, you must also edit the commitment as necessary.

5. To apply the payment to the commitments of another constituent, click **Load commitments** on the action bar. The Constituent (with commitments) Search screen appears so you can search for and select the constituent with the commitments to which to apply the payment. After you select the constituent, you return to the Apply to commitments screen. In the grid, the outstanding commitments of the selected constituent appear.
6. In the **Applied Amount** column of the grid, enter how much of the payment amount to apply to each commitment.

To automatically apply the payment amount to the commitments listed, click **Auto apply** on the action bar. The program automatically applies the payment amount to the amount due of the commitments, starting with the first commitment in the grid, until the total payment amount is applied to commitments. You can adjust the automatic application of the payment amount as necessary.
 - If you click **Auto apply** and the total payment amount exceeds the total amount due for the commitments, the remainder of the payment amount appears in the **Balance (gift amount)** field.
 - If you click **Auto apply** and the total amount due exceeds the payment amount, a commitment receives a partial payment from the applied payment amount.
7. If you apply an amount of the payment to a pledge and the applied amount is greater than the installment amount, in the **Overpayment to** column, select whether to apply the difference to the next installment or overall balance of the pledge. If you select Pledge balance, the program applies the overpayment amount to the final scheduled installment of the pledge.
8. In the **Balance (gift amount)** field, any remainder of the payment amount not applied to commitments appears. To apply the balance toward a donation, an unapplied matching gift claim, or a payment type of Other:
 - a. In the **Additional applications** column, select the type of application to apply the balance toward.
 - b. In the **Applied amount** column, enter the amount of the balance to apply toward the selected application type.
 - c. In the **Designation** column, search for and select the designation to which to apply the application amount.
 - d. If you apply the balance toward a payment type of Other, in the **Other type** column, select the type of Other payment to apply the balance toward.
9. Click **OK**. You return to the batch data entry screen.

Apply to Commitments Screen

The table below explains the items on the Apply to commitments screen. You access this screen when you apply a payment in a batch to outstanding commitments or add a payment for a pledge in batch.

Screen Item	Description
Payment amount	This field displays the total sum of the payment. If necessary, enter the total payment amount.
Apply by	When recording a payment in an enhanced revenue or revenue update batch, the Apply by options appear at the top of the screen. These options allow you to select how you want revenue applied: by Amount or Percent . If you select Amount , the amount allocated displays in the Applied amount column of the grid; if you select Percent , the percent allocated displays in the Applied percent column of the grid.
Balance (gift amount)	This field displays the remainder of the payment amount available to apply to commitments. When you apply an amount of the payment to a commitment, the program automatically updates this field.
Add	When you apply a payment from an constituent to outstanding commitments and the commitment does not appear in the grid, you can add the commitment to the database. Click Add on the action bar and select the commitment to add, such as a pledge or an event registration. For an organization constituent, you can also add an unapplied matching gift.
Edit	After you add an outstanding commitment to a batch, you can edit the commitment as necessary. Select the commitment in the grid and click Edit on the action bar.
Load commitments	To apply the payment amount to the commitments of another constituent, such as if the constituent makes the payment for the commitment of a family member who is also a constituent in the database, click Load commitments . The Constituent (with commitment details) screen appears so you can search the database for the constituent with the commitments to which to apply the payment. After you select the constituent with the commitments to load, you return to the Apply to commitments screen. In the grid, the commitments of the selected constituent appear. The description of each loaded commitment displays the name of its corresponding constituent.
Auto apply	To automatically apply the payment amount to the commitments that appear in the grid, click Auto apply . The program automatically applied the payment amount to the amount due for the commitments, starting with the first commitment in the grid, until the total payment amount is applied to commitments. If the payment amount exceeds the total amount due for the commitments, the remainder of the payment amount appears in the Balance (gift amount) field. If the total amount due for the commitments exceeds the payment amount, a commitment receives a partial payment in the Applied Amount column, or not all commitments receive an amount applied. After you automatically apply the payment amount to the commitments, you can adjust the values in the Applied Amount column as necessary.
Description	This column is disabled and displays the purpose for the commitment.
Balance	This column is disabled and displays the total balance of the commitment. For example, if the constituent has an outstanding pledge, the total balance of the pledge appears.
Date Due	This column is disabled and displays the date the current outstanding commitment is due.
Amount Due	This column is disabled and displays the amount of the current outstanding payment due. For example, if the constituent has an outstanding pledge, the current amount of the pledge due appears.
Applied Amount	When you apply a payment to outstanding commitments, in this column, enter how much of the payment amount to apply to the commitment. When you add a payment for a pledge in a batch, this column is disabled and displays the value entered in the Payment amount field.
Overpayment to	When you apply a payment to a pledge and the amount applied exceeds the installment amount, this column is enabled. Select whether to apply to overpayment amount to the overall balance or next installment of the pledge. If you select Pledge balance, the program applies the overpayment amount to the final installment of the pledge.

Screen Item	Description
Designations	This column is disabled and displays the designation for the commitment.
Additional applications	To apply an amount of the balance toward a donation, an unapplied matching gift claim, or a payment type of Other, select the type of application to which to apply the balance amount and, in the Applied amount column, enter the amount of the balance to apply. In the Designation column, search for and select the designation to which to apply the balance amount. If you apply the balance toward a payment type of Other, in the Other type column, select the type of Other payment to which to apply the balance.
Additional applications with Sponsorships	Please read the Additional application row above in addition to this row when working with sponsorships. If you enter a sponsorship commitment, the bottom grid displays a Sponsorship column and the Additional applications column drop-down menu includes "Sponsorship additional donation." After choosing "Sponsorship additional donation" as the application, the Sponsorship column is enabled and the Designation column disabled. Once you choose a sponsorship and tab out of the column, the Designation automatically defaults to the sponsorship's designation.

Edit Installment Information for a Commitment in a Revenue Batch

When you enter a commitment such as a pledge or recurring gift in a batch, you can view and edit its installment schedule. On the Installment schedule screen, you view the date and amount of the transaction. You can also view or edit the payment frequency, number of installments, date payments are due, and date payments start. The program automatically calculates the installment schedule for the contribution, based on the installment and schedule details you enter in the batch.

► Edit the installment schedule for a commitment in a batch

1. On the batch data entry screen, select the row for the transaction to view.
2. On the menu bar, select **Revenue, Edit installments**. The Installment schedule screen for the selected transaction appears.

Note: To access the Installment schedule screen, you can also press **CTRL + I** on the keyboard or click **Edit installments** on the toolbar.

Installment schedule

Pledge date: 12/12/2008
Pledge amount: \$200.00

Frequency: Single installment
Starting on: 12/12/2008
No. installments: 1

Date	Amount
12/12/2008	\$200.00

3. Review the date and amount of the selected contribution. If required, adjust the installment schedule for the contribution.
4. Click **OK**. You return the batch data entry screen.

Installment Schedule Screen

The table below explains the items on the Installment schedule screen.

Screen Item	Description
Commitment date	The Pledge date or Recurring gift date field displays the date entered in the Date field on the data entry screen.
Commitment amount	The Pledge amount or Recurring gift amount field displays the value entered in the Amount field on the data entry screen.
Frequency	If the selected batch template includes the Installment frequency field, the Frequency field displays the frequency selected in the Installment frequency field on the data entry screen. If no installment frequency is specified in the batch, “Annually” appears by default. Enter the installment frequency as necessary.
Starting on	If the selected batch template includes the Installment start date field, the Starting on field displays the date entered in the Installment start date field on the data entry screen. If no start date is specified in the batch, the date you enter the contribution in the batch appears by default. Enter the date of the first installment as necessary.
No. installments	When the Revenue type is Pledge, this field appears. If the selected batch template includes the No. installments field, the No. installments field displays the value entered in the No. installments field on the data entry screen. If the number of installments is not specified in the batch, “1” appears by default. Enter the number of installments as necessary. To distribute the amount of the contribution over the specified number of installments so each installment amount is the same, click Distribute evenly .
Ending on	When the Revenue type is Recurring gift, this field appears. If the selected batch template includes the Installment end date field, the Ending on field displays the date entered in the Installment end date field on the data entry screen. Enter the date of the final installment as necessary. To view the installment schedule with the specified start and end dates, click Preview . The grid displays the applicable dates and amounts for the schedule.
Date	In the grid, the Date column displays the date each installment is due. The program calculates each installment date, using the values entered in the Installment start date field, Frequency field, and the No. installments or Installment end date field on the data entry screen. If no installment start date is specified in the batch, the date you enter the contribution in the batch appears by default.
Amount	In the grid, the Amount column displays the amount of each installment. For a pledge, the program uses the values entered in the Amount field, Installment frequency field, and No. installments field in the batch to calculate the amount of each installment.

Specify Benefits for a Payment in a Revenue Batch

Benefits are gifts your organization gives to constituents in response to a donation. For example, when a constituent donates a gift, you may send them a free shirt or newsletter as thanks for the payment. Though the donation is not considered payment for the benefits a constituent receives, the benefits value could account for a difference between an initial gift amount and how much of that gift actually counts, such as for tax purposes. When you add a payment to the batch, you can specify its associated benefits.

► Specify benefits for a contribution in a batch

1. On the batch data entry screen, select the contribution in the data entry grid.
2. On the menu bar, select **Revenue, Benefits**. The Benefits screen appears.

Note: To access the Benefits screen, you can also press **CTRL + B** on the keyboard or click **Benefits** on the toolbar.

Benefit details
Payment for Mark D. Adamson

☐ Waive benefits
☒ Total benefits: \$0.00

Reset benefits

Benefit	Quantity	Unit value	Total value	Details
*				

OK Cancel

3. Depending on the selected appeal, the gift may have default benefits associated with it. Select whether to waive the default benefits associated with the payment.
 - If the constituent declines the benefits associated with a gift, select **Waive benefits**. The grid is disabled.
 - If the constituent receives benefits for a gift, select **Total benefits**. The grid is enabled and displays the default benefits associated with the gift.

Note: When you select **Waive benefits**, no benefits are added to the gift. If a gift is associated with multiple default benefits and the constituent declines only some of the default benefits, select **Total benefits** and edit the grid to remove the unwanted benefits.

4. If you select **Total benefits**, enter or update the benefit information in the grid as necessary.
 - a. In the **Benefit** column, the default benefits added to the gift appear. To add or update a benefit, click the binoculars. The Benefit Search screen appears. Use the Benefit Search screen to search the benefits catalog for the benefit the constituent receives. When you locate the benefit, the program enters the name in the **Benefit** column.

 The constituent can receive multiple benefits for the same payment. Enter each benefit received on a separate row of the **Benefit** column.

Note: To select a benefit, it must be included in the benefits catalog on your database. The benefits catalog is managed in **Fundraising**.

- b. When you add a benefit, In the **Quantity** column, the program automatically enters a count of "1" for the benefit. If necessary, update this value to specify the quantity of each benefit the constituent receives.

 When you enter benefit information in the grid, the program multiplies the **Quantity** by the specified **Unit value** to automatically calculate the **Total value** of each benefit.
- c. In the **Details** column, enter any notes about the benefit the constituent receives. For example, record the size and color of a T-shirt.

Note: If you change the default benefits associated with the payment, such as to remove unwanted benefits, you can revert to the default benefit information. To undo changes made to the default benefit information, select **Total benefits** and click **Reset benefits**.

5. Click **OK**. You return to the batch data entry screen.

Benefits Screen

The table below explains the items on the Benefits screen.

Screen Item	Description
Benefit	Click the binoculars and use the Benefit Search screen to search the database for the benefit the constituent receives for the payment. When you locate the benefit, the program enters the name in the Benefit column. The constituent can receive multiple benefits for the same payment. Enter each benefit received on a separate row of the Benefit column.
Quantity	When you first add a benefit to the payment record, the Quantity field automatically displays a count of 1. If necessary, update this value to indicate the quantity the constituent receives of the benefit.
Unit value	The Unit value field automatically displays the value assigned to the benefit when the fundraising administrator adds the benefit to the database. If necessary, update the monetary value of a single unit of the benefit.
Total value	The program automatically multiplies the Quantity by the Unit value to calculate and display the total value of the benefit in the Total value field.
Details	Enter any notes about the benefit the constituent receives. For example, you can record the size and color of a T-shirt the constituent receives for the payment.

Apply a Transaction in a Revenue Batch to Multiple Designations

Designations specify the campaigns and initiatives, or overall and specific purposes, for a transaction. When you receive a transaction, you must specify how you plan to use the revenue. It is important to enter this information for each transaction your organization receives so you can develop statistics to determine the financial progress of the designation.

When you add a transaction to a batch, you can distribute a single payment amount between multiple designations. When you split a transaction, you must specify the amount to apply to each designation. For example, a constituent may send in a payment to pay for membership dues and to donate to a campaign. You can split the payment so that a specific amount is applied toward membership dues and the rest is applied to the campaign.

Note: With the enhanced revenue batch type, you can use the **Split designations** task to apply only pledges and recurring gifts to multiple designations. For information about how to apply a payment to multiple designations, see *Apply a Payment in a Revenue Batch to Outstanding Commitments* on page 85.

► Split designations for a transaction in a batch

1. On the batch data entry screen, select the transaction to apply to designations.
2. On the menu bar, select **Revenue, Split designations**. The Split designations screen appears.

Note: To access the Split designations screen, you can also press **CTRL + P** on the keyboard or click **Split designations** on the toolbar.

Split designations

Total amount: \$50.00

Designation	Amount	Campaigns
CAMP	\$25.00	<Campaigns>
BUILDING	\$25.00	<Campaigns>
*		

Distribute evenly

OK Cancel

3. In the **Designation** column, search for and select the designations to apply the total amount. Enter each designation in a separate row.
4. In the **Amount** column, enter how much of the total amount to apply to each designation. To split the payment evenly across all designations, click **Distribute Evenly**.
5. When you click in the **Campaigns** column, the **Campaign** and **Campaign subpriority** columns appear. In the **Campaign** column, select the campaign to which to apply the revenue. To select a campaign, click the binoculars in the field and use the Campaign Search screen.
To apply the revenue to a subpriority of a selected campaign, select the subpriority in the **Campaign subpriority** column for the campaign.
6. To split the payment evenly across all designations, click **Distribute evenly**.
7. Click **OK**. You return to the batch data entry screen. In the **Designation** field, <split> appears.

Split Designations Screen

The table below explains the items on the Split designations screen.

Screen Item	Description
Total amount	The Total amount field displays the amount of the transaction you can apply to designations.
Designation	Enter each designation to apply the transaction in a separate row. To search the database for a designation, click the binoculars and use the Designation Search screen.
Amount	Enter how much of the Total amount to apply to each designation. The sum of the Amount column must equal the Total amount . To split the Total amount evenly between the designations, click Distribute Evenly .
Campaigns	When you click in the Campaigns column, the Campaign and Campaign subpriority columns appear. In the Campaign column, select the campaign to which to apply the revenue. To select a campaign, click the binoculars in the field and use the Campaign Search screen. To apply the revenue to a subpriority of a selected campaign, select the subpriority in the Campaign subpriority column for the campaign.

Add a Note for a Payment in a Revenue Batch

Notes are excellent tools that provide additional insight about a contribution in a batch. Once you add a note a batch, you can select to open the note to view or update its information. When the revenue batch processing

manager commits the batch to the database, a note added a contribution appears on the Documentation tab of the Payment Details of the payment record.

Note: You can add notes from the Enhanced Revenue and Revenue Update batch. From the Revenue Update batch, you can also edit notes.

► **Add or edit a note in a revenue batch**

- 1. On the batch data entry screen, select the contribution to add a note for.
- 2. On the action bar, click **Edit note for this row**. The Add note screen appears.

Note: To access the Add note screen, you can also press **CTRL + E** on the keyboard or click **Note** on the toolbar.

The screenshot shows a software window titled 'Add Note'. It contains several input fields: 'Type' (a dropdown menu), 'Date' (a date field with '6/12/2009'), 'Title' (a text field), and 'Author' (a text field with a search icon). Below these is a large text area for the note content, with a toolbar above it featuring options like font face (Tahoma), bold, italic, underline, font size, and color. At the bottom right are 'Save' and 'Cancel' buttons.

- 3. In the **Type** field, select the applicable type of note.

Note: Your IT Administrator designates the options available on the **Type** field drop-down list. If the note type you want does not appear on this list, consult your IT Administrator.

- 4. In the **Date** field, enter the date you add or edit the note. To select a date from a calendar, click the drop-down arrow.
- 5. In the **Title** field, enter a description to help identify the note.
- 6. In the **Author** field, click the binoculars. The Staff Search screen appears so you can search the database for the person who creates the note.
- 7. In the **Notes** field, enter any information or details about the contribution.
- 8. Click **OK**. You return to the previous page.

Add Note Screen

The table below explains the items on the Add note screen.

Screen Item	Description
Type	Select the applicable type of revenue detail note. Your IT Administrator designates the options that appear on the drop-down list of this field.

Screen Item	Description
Date	Enter the date you add or edit the revenue detail note. To select the date from a calendar, click the drop-down arrow.
Title	Enter a description to help identify the revenue detail note such as "Donor Preferences".
Author	Enter the name of the data entry person to add the revenue detail note to the payment. To search your database for the data entry person's name, click the binoculars.
Notes	Enter any notes text related to the payment, such as "Robert prefers to donate to health care causes".

Add/Edit Notes in a Revenue Update Batch

When working in a Revenue Update batch, you are not restricted to one note per entry. You can add as many notes as necessary. In addition, you can edit exiting notes.

► Add a note to a Revenue Update batch entry

1. On the batch data entry screen, select the entry for which you want to add a note.
2. Click **Revenue, Note**.
 - If this is the first note to be added to this entry, the Add note screen appears. For information about the items included on this screen, see Add Note Screen on page 94.
 - If the entry already has at least one note, the Notes screen appears, listing all notes included on the entry. In an empty row, click the **Edit** icon. The Add note screen appears. For information about the items included on this screen, see Add Note Screen on page 94.
3. Click **OK**. You return to the previous page.

► Edit a note on a Revenue Update batch entry

1. On the batch data entry screen, select the entry for which you want to edit a note.
2. Click **Revenue, Note**. The Notes screen appears.
3. In the row corresponding to the entry you want to change, click the **Edit** icon. The Add note screen appears. For information about the items included on this screen, see Add Note Screen on page 94.
4. Click **OK**. You return to the previous page.

Add a Payment for a Pledge in a Revenue Batch

When you add a pledge to a revenue batch, you can enter and apply a payment to the pledge at the same time. This saves you the duplicate effort of entering the same information for multiple transactions in the batch. When you add and apply a payment toward the current pledge in the batch, the payment does not appear on the batch data entry screen. However, the program adds the payment to the database during the committal of the batch.

► Add a payment to a pledge in a revenue batch

1. On the revenue batch data entry screen, select the pledge to which to apply a payment.
2. On the menu bar, select **Revenue, Payment for pledge**. The Payment for pledge screen appears. The items on this screen are the same as the Apply to commitments screen. For information about the items on this screen, see Apply a Payment in a Revenue Batch to Outstanding Commitments on page 85.

Payment for pledge
Payment for Robert C. Hernandez

Payment amount:
 Balance (gift amount): Auto apply

Description	Balance	Amount Due	Date Due	Applied Amount
► Pledge for Robert C. Hernandez	\$200.00	\$200.00	12/12/2008	\$200.00

OK Cancel

3. The grid displays information about the pledge selected in the batch. In the **Payment amount** field, enter the amount of the payment to apply to the pledge.
4. Click **OK**. You return to the batch data entry screen.

Note: When you add a payment for a pledge in a batch, the payment entered does not appear in the grid on the batch data entry screen. However, the program automatically creates the payment and applies it to the pledge during the batch committal.

Add a Matching Gift Claim for a Transaction in a Revenue Batch

Companies may donate a payment to match one donated by one of their employees or corporate partners. For example, if an employee donates \$100 to your organization, you may receive an additional matching gift from the employer. Organizations can also match gifts donated by other organizations; however, an organization cannot match its own gift. When you add a payment to a revenue batch, you can also set up a matching gift claim for the payment as necessary.

We recommend you enter the amount of the payment in the batch before you select to add a matching gift claim for it. The program automatically uses the amount of the payment in the batch and the matching gift conditions specified on the organization constituent record to calculate the matching gift claim amount.

Note: When an organization matches a payment, you should track it as a matching gift claim until you receive the payment from the organization.

With batches of the Enhanced Revenue batch type, you can add multiple matching gift claims for a transaction, such as if the constituent has matching gift relationships with multiple organizations.

► Add a matching gift claim for a transaction in a revenue batch

1. On the revenue batch data entry screen, select the transaction associated with the matching gift claim.
2. On the action bar, select **Add a Matching Gift claim**. The Add matching gift claims screen appears.

Note: To access the Add matching gift claims screen, you can also press **CTRL + M** on the keyboard or click **Add matching gift claim** on the toolbar.

Add matching gift claims

Matching organization	Relationship	MG condition type	Date	Amount	Designation
▶ The Bean Grinder	Employee	Employee	10/10/2009	\$100.00	BUILDING
*					

Matching gift condition summary

Matching factor:	1.00	Relationship types:	
Min match per gift:	\$10.00	Revenue type:	Gift
Max match per gift:	\$1,000.00	Matching amount:	Full gift amount
Notes: Will match only for full-time employees.			

Note: You can delete a matching gift claim from a transaction in a revenue batch. On the Add a matching gift claim screen, select the claim to delete and click **Delete**.

3. In the **Matching organization** field, search for and select the organization constituent that matches donations from the constituent.
4. In the **Relationship** field, select the constituent's relationship to the matching organization.

Note: To add a new relationship, click the **New** button in the **Relationship** field. The Add relationship screen appears where you can specify relationship details. Note that when you click **Save**, the information saves even though you have not yet committed the batch.

5. In the **MG condition type** field, select the matching gift condition applicable to the constituent's relationship with the matching organization. Under **Matching gift condition summary**, the conditions for the selected condition type, as entered on the organization's constituent record, appear.
6. In the **Date** field, enter the date to associate with the matching gift claim. If you do not enter a date, the current date appears by default.
7. In the **Amount** field, the program automatically displays the amount of the matching gift claim, calculated using the amount entered for the payment in the batch and the matching gift conditions specified on the constituent record of the selected organization. Enter or edit the amount of the claim as necessary. If you did not yet enter an amount for the payment in the batch, a zero amount may appear in this field.
8. In the **Designation** field, the designation entered for the payment in the batch appears. If you did not yet enter the designation for the payment, search for and select the designation to receive the payment. To apply the matching gift claim to multiple designations, enter a separate matching gift claim for each designation.
9. Click **OK**. You return to the batch data entry screen.

Add Matching Gift Claims Screen

The table below explains the items on the Add matching gift claims screen.

Screen Item	Description
Matching organization	Search for and select the organization constituent associated with the matching gift claim.
Relationship	Select the constituent's relationship to the selected matching organization, such as Employee.
MG condition type	Select the matching gift condition type to apply to the claim, such as Employee. When you select a condition type, the matching gift conditions for that type, as entered on the organization's constituent record, appear under
Date	Enter a date to associate with the matching gift claim. By default, the date you enter for the payment in the batch appears. If you do not enter a date for the payment, the current date appears.
Amount	The program uses the amount entered for the payment in the batch and the matching gift conditions specified on the constituent record of the selected organization to calculate and display the amount of the matching gift claim in the Amount field. If you do not enter an amount for the payment in the batch, or if the organization does not have matching gift conditions specified, the amount is zero. Enter or edit the matching gift claim amount as necessary.
Designation	Search for and select the designation to which to apply the matching gift claim. To apply the matching gift claim to multiple designations, add a separate claim for each designation.
Matching gift condition summary	Displays the matching gift conditions for the condition type selected in the MG condition type column appear. The matching gift conditions for the matching organization are configured on the organization's constituent record

Specify Tributes for a Payment in a Revenue Batch

You can track detailed information about revenue given in honor, memory, or celebration of an individual or organization. When you enter transactions in a revenue batch, you can select the tributes to which revenue should be designated. For example, your organization sets up a tribute for a constituent. When you receive revenue on behalf of the constituent, you can designate the revenue to the tribute when you enter the transaction into a batch.

► Specify the tributes for a payment in a revenue batch

1. On the revenue batch data entry screen, select the payment associated with the tribute.
2. On the action bar, select **Tributes**. The Tributes screen appears. For information about the items on this screen, see Tributes Screen on page 99.

Note: To access the Tributes screen, you can also press **CTRL + U** on the keyboard or click **Tributes** on the toolbar.

The screenshot shows a window titled "Tributes". Inside is a table with the following structure:

Tribute	Amount	Default designation
▶ [binocular icon]		
* [empty]		

Below the table is a button labeled "Distribute evenly". At the bottom of the window are "OK" and "Cancel" buttons.

3. In the **Tribute** column, search for and select the tribute to designate for the payment. After you locate the tribute, its name appears in the **Tribute** column.

You can designate multiple tributes for the same payment. Enter each tribute on a separate row of the **Tribute** column.

4. In the **Amount** column, enter how much of the payment to designate to each tribute. The amount applied to tributes cannot be greater than the total payment amount.

To divide the payment amount evenly across multiple tributes, click **Distribute evenly**.

5. Click **OK**. You return to the batch data entry screen.

Note: If you do not select a designation for the payment on the batch data entry screen before specifying tributes, the default designation for the selected tribute automatically appears in the **Designation** field for the payment on the data entry screen. If you apply the payment to multiple tributes, "<split>" appears in the **Designation** field.

Tributes Screen

The table below explains the items on the Tributes screen.

Screen Item	Description
Tribute	Enter the tribute to designate for the payment. To search the database for the tribute, click the binoculars and use the Tribute Search screen. When you locate the solicitor, the program enters the name in the Tribute column. To designate multiple tributes for the same payment, enter each tribute on a separate row of the Tribute column.
Amount	Enter how much of the payment to designate to each tribute. The total amount designated to tributes cannot be greater than the total amount of the payment.
Default designation	The Default designation column displays the designation to which each tribute applies. Your selection in the Tribute column determines the default designation. You cannot change the entry in the Default designation column. If you do not select a designation for the payment before designating tributes, the default designation automatically appears in the Designation field for the payment on the data entry screen. If you designate multiple tributes for the payment, "<split>" appears.
Distribute evenly	To distribute the payment amount evenly across all tributes specified in the grid, click this button.

Specify Recognition Credits for a Transaction in a Revenue Batch

Recognition credits provide flexibility for crediting constituents for the transaction. For example, you can credit additional constituents for the revenue and decide how much credit each constituent receives. You can also recognize a donor for an amount that is greater than the revenue amount or lower than the revenue amount. Lastly, you can recognize donors for a portion of the transaction over multiple periods of time. Recognition credits are associated with revenue. However, due to the flexibility of recognition credits, it is important to distinguish recognition credits from revenue. When you add a transaction in a revenue batch, you can specify its recognition credits.

► Specify recognition credits for a transaction in a revenue batch

1. On the batch data entry screen, select the transaction for which to assign recognition credit in the data entry grid.
2. From the action bar, select **Recognitions**. The Recognitions screen appears.

Note: To access the Recognitions screen, you can also press **CTRL + O** on the keyboard or click **Recognitions** on the toolbar.

Note: For a payment with multiple applications of donations, unapplied matching gift payments, or payments of type Other, the Recognitions screen displays the applications of the payment. In the **Recognition recipients** column, click the **Recognitions** button for the application for which to assign recognition credit. The Recognitions screen for the application appears.

Recognitions
Pledge for Robert C. Hernandez

Total amount: \$200.00

Recognition credit type	Constituent	Effective date	Amount
▼	Robert and Julia H.	12/12/2008	\$75.00
	Robert C. Hernandez	12/12/2008	\$75.00
*			

Distribute ▼

OK Cancel

3. The first row of the grid displays the constituent associated with the transaction in the batch. You can assign recognition credit to multiple constituents for the same transaction, such as if a constituent requests that his spouse receives recognition for a payment. Enter each constituent on a separate row of the **Constituent** column.

To search for a constituent to receive recognition for the transaction, click the binoculars and use the Constituent Search screen. When you locate the constituent, the program enters the name in the **Constituent** column.

4. In the **Recognition credit type** column, select the type of recognition credit each constituent in the grid receives. For example, if the spouse receives recognition for revenue given by a constituent, assign the spouse a recognition credit type of "Spouse".

5. In the **Effective date** column, enter a date to associate with the recognition credit. For example, for a one-time payment, enter the date associated with the payment in the batch.
6. In the **Amount** column, enter how much of the total amount to recognition credit each constituent. If you give full credit to the recognition credit recipient, both he and the giver of the payment receive full credit for the payment without duplicating the payment in your database.

If you enter multiple recognition credit recipients, specify how much of the payment amount to credit each constituent. To easily distribute the recognition credit between multiple constituents, click **Distribute** and select **Evenly** or **Full amount to all**.

- To distribute the payment amount evenly between the multiple constituents, select **Evenly**. Each constituent receives a recognition credit for an equal share of the payment amount. For example, if you select **Evenly** to divide the total payment amount between two recognition credit recipients, each constituent receives credit for half of the total amount.
- To apply a recognition credit to each constituent for the full payment amount, select **Full amount to all**. Each constituent receives a recognition credit for the total amount.

7. Click **OK**. You return to the batch data entry screen.

Recognitions Screen

The table below explains the items on the Recognitions screen.

Screen Item	Description
Total amount	The Total amount field displays the amount of the payment available to apply as recognition credit.
Recognition credit type	In this column, select the type of recognition credit each constituent receives. For example, if the transaction is from a constituent and the couple requests you recognize the spouse for the revenue, select "Spouse". You can use this column to track where a transaction came from, such as a spouse, and how to use the recognition credit, such as an honor roll or a board credit.
Constituent	In this column, enter the constituent to receive recognition for the revenue. To apply recognition credit to multiple constituents for the same payment, enter each constituent on a separate row of the column. To search the database for the constituent, click the binoculars and use the Constituent Search screen. When you locate the constituent, the program enters the name in the Constituent column.
Effective date	In this column, enter a date to associate with the recognition credit. For one time payments, this date is typically the same as the revenue date. If you distribute a large recognition credit over time, the effective date is important. For example, Kathleen Bently donated a \$50,000 gift. Your organization agrees to recognize her gift at the \$10,000 Honor Roll level for the next five years. The effective date for the first year is the same as the revenue date. The effective date for the next four years increases by one year. When you add a recurring gift, the revenue transfers to your organization only when a recurring gift payment is made. Therefore, the effective date does not apply for recurring gifts, but instead for recurring gift payments.
Amount	Enter the amount to credit each constituent. If you give full credit to the recognition credit recipient, both he and the giver of the payment receive full credit for the payment without duplicating the payment in your database. If you enter multiple recognition credit recipients, specify how much of the total amount to credit each constituent. To easily distribute the soft credit between multiple constituents, click Distribute and select Evenly or Full amount to all . To apply a recognition credit to each constituent with an equal share of the payment amount, select Evenly . Each constituent receives a recognition credit for an equal share of

Screen Item	Description
	the payment. To apply a recognition credit to each constituent with the full payment amount, select Full amount to all . Each constituent receives a recognition credit for the total amount of the payment.

Specify Solicitors for a Transaction in a Revenue Batch

When your organization receives revenue because of the work performed by a solicitor, you can credit the solicitor on the payment record for the full or partial payment amount. For example, during an annual phonathon, a solicitor calls a constituent to ask for a donation. If the constituent makes a donation, you can give credit to the solicitor when you add the payment to a batch. You can give credit to a solicitor on a payment record to track the overall performance of your solicitors.

If you defined default credit rules for solicitors in *Prospects*, the program automatically credits each solicitor associated with the fundraising plan or funding request based on the distribution you selected. For information about how to create default credit rules, see the *Prospects Guide*.

► Specify solicitors for a transaction in a batch

1. On the batch data entry screen, select the transaction to credit a solicitor in the data entry grid.
2. On the action bar, select **Solicitors**. The Solicitors screen appears.

Note: To access the Solicitors screen, you can also press **CTRL + T** on the keyboard or click **Solicitors** on the toolbar.

Note: For a payment with multiple applications of donations, unapplied matching gift payments, or payments of type Other, the Solicitors screen displays the applications of the payment. In the **Solicitors** column, click the **Solicitors** button for the application to credit to solicitors. The Solicitors screen for the application appears.

Solicitors
Pledge for Robert C. Hernandez

Total amount: \$200.00 Reset solicitors

Solicitor	Amount
Renee Diresta	\$100.00
William Autumn	\$100.00
* <input type="text"/>	

Distribute

OK Cancel

3. In the **Solicitor** column, search for and select the solicitor to receive credit for the revenue. After you locate the solicitor, the name appears in the **Solicitor** column.

Note: If you defined default credit rules for solicitors, each solicitor associated with the fundraising plan or funding request automatically appears in the **Solicitors** grid.

You can credit multiple solicitors for the same application. Enter each solicitor on a separate row of the **Solicitor** column.

4. In the **Amount** column, enter how much of the total amount to credit each solicitor.
5. If multiple solicitors receive credit for the payment, specify how much of the payment amount to credit each solicitor.

Note: When you credit multiple solicitors for the same revenue, the total distributed credit does not need to equal the total amount. However, you cannot credit a single solicitor for more than the total amount.

To easily distribute the credit between multiple solicitors, click **Distribute** and select **Evenly** or **Full amount to all**.

- To distribute the payment amount evenly between the multiple solicitors, select **Evenly**. Each solicitor receives a credit for an equal share of the payment amount. For example, if you select **Evenly** to divide the total payment amount between two solicitors, each solicitor receives credit for half of the total amount.
 - To credit each solicitor for the full payment amount, select **Full amount to all**. Each solicitor receives credit for the total amount. For example, if you select **Full amount to all** to divide the total payment amount between two solicitors, each solicitor receives credit for the total amount of the payment.
6. To reset solicitor information, click **Reset solicitors**.
 - For revenue not associated with a major giving opportunity, click **Reset solicitors** to delete the solicitors and credit amounts you added to the grid.
 - For revenue applied to a major giving opportunity, click **Reset solicitors** to display the solicitors associated with the opportunity and reset the credit amounts for each solicitor to those defined by the default credit rules.
 7. Click **OK**. You return to the batch data entry screen.

Add Acknowledgement Letters to Revenue in an Enhanced Revenue Batch

For each batch entry, you can determine which constituents should receive an acknowledgement letter. The program automatically tracks information about these letters on the Letters tab of the revenue record.

For more information about acknowledgement letters for revenue, see the *Revenue Guide*.

► Add an acknowledgement letter to a batch entry

1. On the batch data entry screen, select the transaction with which to associate an acknowledgement letter.
2. On the action bar, select **Letters**. The Letters screen appears.

Note: To access the Letters screen, you can also press **CTRL + E** on the keyboard or click **Letters** on the toolbar.

Letter type	Tribute	Letter	Acknowledgee	Acknowledge date	Process date	Out of date	Clear dates
* [dropdown]						<input type="checkbox"/>	<input type="checkbox"/>

3. In the **Letter type** field, select whether to send a revenue or tribute acknowledgement letter to a constituent.
4. In the **Tribute** field, if you selected “Tribute” in the **Letter type** field, select the tribute you want to acknowledge.
5. In the **Letter** field, select the letter the constituent receives. The options that appear are the letters available in **Acknowledgements**.
6. In the **Acknowledgee** field, enter the constituent to receive the letter. To search for a constituent, click the binoculars and use the Constituent Search screen.
7. In the **Acknowledge date** field, enter the date you plan to mail the letter to the constituent.
8. For revenue letters, select the **Out of date** checkbox if you want to generate a new acknowledgement for the selected revenue.
9. Select **Clear dates** to clear the process date and acknowledge date associated with a previous process

Letters Screen

The table below explains the items on the Letters screen. For information about how to access this screen, see Add Acknowledgement Letters to Revenue in an Enhanced Revenue Batch on page 103.

Screen Item	Description
Letter type	Select whether to send a revenue or tribute letter to the acknowledgee. For more information about acknowledgement letters for revenue, see the <i>Revenue Guide</i> or the Revenue Records section of the help file.
Tribute	Select the tribute you want to reference in the letter.
Letter	Select the letter the constituent will receive. The options that appear are the letters available in Acknowledgements .
Acknowledgee	Select the constituent to receive the acknowledgement letter.
Acknowledge date	Enter the date you plan to mail the letter to the constituent.
Process date	When you run an acknowledgement process to generate a letter, the letter has a process date—the date on which you run the process. Since you manually add letters to revenue in a batch, there is no process date and this field is disabled.
Out of date	Acknowledgement processes use the process date and acknowledgement date to determine if the process can be run again for the selected acknowledgement. When you mark a letter as out of date, you can generate a new acknowledgement for the selected revenue. For example, if there is a misspelling in the first acknowledgement letter, when you mark Out of date , you can send the constituent a corrected version of the letter.
Clear dates	If you want to include the revenue in another acknowledgement process, you must remove any process and acknowledgment date associated with the letter. Select Clear dates to remove these dates.

Specify Business Units for a Transaction in an Enhanced Revenue Batch

When your organization receives revenue designated for specific business units, such as Donation or Direct Marketing, you can view the business unit(s) associated with a revenue item in your enhanced revenue batch. If necessary, from the batch screen you can also edit the business unit currently associated with the payment record.

► View/edit business units associated with a transaction in a batch

1. On the batch data entry screen, in the data entry grid, select the transaction for which you want to view or edit business unit information.
2. On the menu bar, select **Revenue, Business units**. The Business units screen appears. The screen displays the total amount of the commitment. In the grid, you can view any existing business unit assignments.
3. To edit an assignment, in the row of the assignment you want to change, click the edit icon. The Business units screen appears.

Business units

Donation
Total amount: \$300.00

☒ Override business units

Reason for override: Reason one

Business unit	Amount
Annual Programs	\$150.00
► Development	\$150.00
*	

Distribute

OK Cancel

4. Select **Override business units** to activate the form.
5. In the **Reason for override** field, select the reason why the business unit is to be changed. Reasons to override business units are created in **Code Tables** in *Administration* (select **Revenue Split Business Unit Override Reason** under **Revenue** on the Code Table page).
6. In the **Business unit** column select the unit(s) you want credited for the revenue.
7. In the **Amount** column enter the specific amount to be credited to the corresponding **Business unit** or click **Distribute** and select either **Split evenly** to divide the amount evenly between all units or **Split fully** to give each unit full credit for the revenue.
8. Click **OK**. You return to the Business units screen.
9. Click **OK**. You return to the batch data entry screen.

Add or Update a Constituent Record in a Revenue Batch

For enhanced revenue batches, you can add or update the constituent record associated with a revenue transaction..

► Add a constituent in a revenue batch

1. On the revenue batch data entry screen, in the revenue transaction row, enter the constituent's name or lookup ID. The Batch Revenue Constituent Search screen appears.
2. Click **Add** and then select the type of constituent record to add. The Add constituent screen appears.
3. On the tabs, enter information about the new constituent and click **Save**. You return to the revenue batch data entry screen and the new constituent appears in the **Constituent** column.

Note: The constituent record is not added to the database until you commit the batch.

► Update a constituent in a revenue batch

1. On the revenue batch data entry screen, select the revenue transaction row and click **Edit** on the menu bar under **Constituent**. The Edit constituent screen appears.
2. Click **Add**, and then select the type of constituent record to add. The Add Constituent screen appears.
3. Update the information on the tabs and click **Save**. You return to the revenue batch data entry screen.

Note: The constituent record is not updated until you commit the batch.

AuctionMaestro Pro Import Batch Data Entry Tasks

After you have created your auction and exported the auction data to *AuctionMaestro Pro*, and held the auction in *AuctionMaestro Pro*, you import the results of the auction back into your Blackbaud program. The data that is transferred into your Blackbaud program is handled through the AuctionMaestro Pro Import Batch. The AuctionMaestro Pro Import Batch allows you to review and edit information such as new auction items and packages, edited auction items and packages, auction item and package purchases, donations, new constituents, edited constituent information, event registrations, and changes to the auction event record.

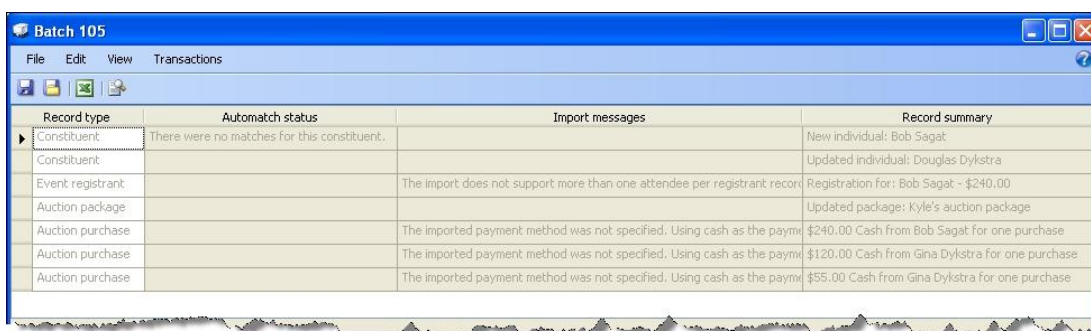
Review Constituents

If a new constituent record is created, or an existing constituent's record is updated or edited during the auction in *AuctionMaestro Pro*, you can review the new or edited constituent data before you commit the AuctionMaestro Pro Import Batch. You can leave the information as it appears to accept the changes or edit them as necessary from the Review constituent screen.

Note: For updates to existing constituents, you can only edit the information about the constituent that was changed in *AuctionMaestro Pro*.

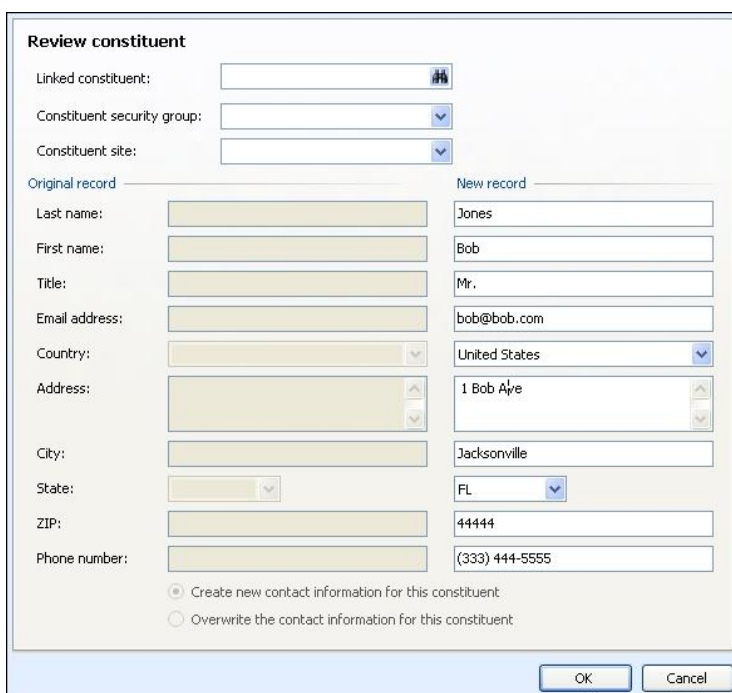
► Review constituents

1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.




Record type	Automatch status	Import messages	Record summary
Constituent	There were no matches for this constituent.		New individual: Bob Sagat
Constituent			Updated individual: Douglas Dykstra
Event registrant		The import does not support more than one attendee per registrant record.	Registration for: Bob Sagat - \$240.00
Auction package			Updated package: Kyle's auction package
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$240.00 Cash from Bob Sagat for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$120.00 Cash from Gina Dykstra for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$55.00 Cash from Gina Dykstra for one purchase

2. Select a row with a Record type of Constituent, and click the **Review changes** button on the menu bar. The Review constituent screen appears. For more information about the items on this screen, see Review Constituent Screen on page 108.



Review constituent

Linked constituent: 

Constituent security group:

Constituent site:

Original record

Last name:

First name:

Title:

Email address:

Country:

Address:

City:

State:

ZIP:

Phone number:

New record

Last name: Jones

First name: Bob

Title: Mr.

Email address: bob@bob.com

Country: United States

Address: 1 Bob Ave

City: Jacksonville

State: FL

ZIP: 44444

Phone number: (333) 444-5555

☒ Create new contact information for this constituent

☐ Overwrite the contact information for this constituent

OK Cancel

Note: The fields under **Original record** are inactive, and serve as a comparison to the original constituent record if changes were made in *AuctionMaestro Pro*.

3. For a new constituent, in the **Linked constituent** field, click the binoculars to locate a constituent to which the new constituent should be linked.

For a constituent that already exists, the constituent's name appears, and this field is inactive.

Note: If you set the program to attempt to auto-match unknown constituents that are added in *AuctionMaestro Pro* with constituents in your Blackbaud program's database, and any matches were found, the **Review matches** button appears. Click this button to access the Review matches screen to match the unknown constituent with one already in your database. For more information about how to review matches, see Review Constituent Matches on page 108.

4. For a new constituent, select a security group in the **Constituent security group** field.

For a constituent that already exists, this field is inactive.

5. For a new constituent, select a site for which they should be associated in the **Constituent site** field.
For a constituent that already exists, this field is inactive.
6. Under **New record**, for a new constituent, review all of the address fields and edit them as necessary.
For constituents that already exist, you can only edit the fields that were changed in *AuctionMaestro Pro*.
7. For constituents that already exist, select whether new contact information should be created to accommodate the changes to the constituent record, or if the current information on the constituent record should be overwritten with the changes.
8. Click **OK**. You return to the Batch screen.

Review Constituent Screen

The table below explains the items on the Review constituent screen. For more information about how to access this screen, see Review Constituents on page 106.

Screen Item	Description
Linked constituent	If the constituent was not auto-matched during the import from <i>AuctionMaestro Pro</i> into your Blackbaud program, but you know the constituent exists in your system, click the magnifying glass to locate the constituent to which the new constituent should be matched. Otherwise, leave this field blank to create a new constituent record.
Constituent security group	Select the security group to which the constituent should be associated.
Constituent site	Select the site for which the constituent should be associated.
Last name and First name	Enter the name of the constituent exactly as it should appear throughout your database such as on pages and reports.
Title	Enter a title for the individual such as Mr., Mrs., or Ms.
Email address	Enter the email address for the constituent.
Country	Select the country of the constituent's address.
Address	Enter the street address or post office box for the constituent.
City	Enter the city or town for the constituent's address.
State	Select the state of the constituent's address.
ZIP	Enter the Zip code for the constituent's address.
Phone number	Enter the phone number for the constituent.
Create new contact information for this constituent	Select this option if the new information you entered should be added to the constituent record along with the constituent's current contact information.
Overwrite the contact information for this constituent	Select this option if the new information you entered should overwrite the current corresponding information on the constituent's record.

Review Constituent Matches

When you import auction results from *AuctionMaestro Pro*, you can set the program to attempt to auto-match any unknown constituents added during the auction with constituents in your Blackbaud program's database.

For more information about the AuctionMaestro Pro import, see the *Events Guide*.

When you import auction results from *AuctionMaestro Pro*, you can set the program to attempt to auto-match any unknown constituents added during the auction with constituents in your Blackbaud program's database. For more information about the AuctionMaestro Pro import, see the Auctions section of the help file.

When you review constituent record types in the AuctionMaestro Pro Import Batch, you can click the **Review matches** button on the Review constituent screen to access the Review matches screen and view the possible matches to the unknown constituent record created in *AuctionMaestro Pro*. On this screen all possible constituent matches appear along with a match confidence percentage and constituent contact information.

Note: If no matches were made, the **Review matches** button does not appear.

If you determine that a positive match has been found, select the constituent and click **Use the selected constituent**. You return to the Review constituent screen and the matched constituent's contact information appears. For more information about the Review constituent screen, see Review Constituents on page 106.

If you determine that none of the matches are correct, click **Create new constituent**. You return to the Review constituent screen where you can edit the contact information of the new constituent if necessary. For more information about the Review constituent screen, see Review Constituents on page 106.

Review Auction Events

If the name or date of an auction event is edited in *AuctionMaestro Pro*, you can review the changes before you commit the AuctionMaestro Pro Import Batch. You can leave the information as it appears to accept the changes, or edit them as necessary from the Review changed auction event screen.

Note: For updates to auction events, you can only edit the information about the event that was changed in *AuctionMaestro Pro*.

► Review changed auction event

1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.

Record type	Automatch status	Import messages	Record summary
► Constituent	There were no matches for this constituent.		New individual: Bob Sagat
Constituent			Updated individual: Douglas Dykstra
Event registrant		The import does not support more than one attendee per registrant record	Registration for: Bob Sagat - \$240.00
Auction package			Updated package: Kyle's auction package
Auction purchase		The imported payment method was not specified. Using cash as the payment	\$240.00 Cash from Bob Sagat for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment	\$120.00 Cash from Gina Dykstra for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment	\$55.00 Cash from Gina Dykstra for one purchase

2. Select a row with a Record type of Auction event, and click the **Review changes** button on the menu bar. The Review changed auction event screen appears.

Review changed auction event

Original record: Name: Summer Auction Start date: 07/09/2010

New record: Name: Summer Auction 2010 Start date: 07/09/2010

OK Cancel

3. In the **Name** field, enter the correct name of the auction event as it should appear in your database if necessary.
4. In the **Start date** field, select the correct start date of the auction event if necessary.
5. Click **OK**. You return to the Batch screen.

Review Event Registrants

If a new event registrant record is created during the auction in *AuctionMaestro Pro*, you can review the new registration data before you commit the AuctionMaestro Pro Import Batch. You can leave the information as it appears to accept the changes, or edit them as necessary from the Review registrant screen.

► Review registrant

1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.

Record type	Automatch status	Import messages	Record summary
Constituent	There were no matches for this constituent.		New individual: Bob Sagat
Constituent			Updated individual: Douglas Dykstra
Event registrant		The import does not support more than one attendee per registrant record	Registration for: Bob Sagat - \$240.00
Auction package			Updated package: Kyle's auction package
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$240.00 Cash from Bob Sagat for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$120.00 Cash from Gina Dykstra for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$55.00 Cash from Gina Dykstra for one purchase

2. Select a row with a Record type of Event registrant, and click the **Review changes** button on the menu bar. The Review registrant screen appears.

Review registrant

Registrant: Bob Jones

Registration option: Doug Registration Opt - \$120.00

Registration amount: \$240.00

OK Cancel

3. In the **Registrant** field, click the binoculars to locate a constituent to associate with the event registration.
4. In the **Registration option** field, select a registration option for the constituent.

5. In the **Registration amount**, enter a dollar amount for which the registrant has paid toward their event registration.
6. Click **OK**. You return to the Batch screen.

Review Auction Items

If a new auction item is created, or an existing auction item record is updated or edited during the auction in *AuctionMaestro Pro*, you can review the new or edited auction item data before you commit the AuctionMaestro Pro Import Batch. You can leave the information as it appears to accept the changes or edit them as necessary from the Review item screen.

Note: You can only edit the information about the auction item that was changed in *AuctionMaestro Pro*.

► Review items

1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.

Record type	Automatch status	Import messages	Record summary
► Constituent	There were no matches for this constituent.		New individual: Bob Sagat
Constituent			Updated individual: Douglas Dykstra
Event registrant		The import does not support more than one attendee per registrant record	Registration for: Bob Sagat - \$240.00
Auction package			Updated package: Kyle's auction package
Auction purchase		The imported payment method was not specified. Using cash as the payment method	\$240.00 Cash from Bob Sagat for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method	\$120.00 Cash from Gina Dykstra for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method	\$55.00 Cash from Gina Dykstra for one purchase

2. Select a row with a Record type of Auction item, and click the **Review changes** button on the menu bar. The Review item screen appears. For more information about the items on this screen, see Review Item Screen on page 112.

Review item

Item:

Original record

Name:

Category:

Subcategory:

Description:

Value:

Minimum bid:

Donation date:

Expiration date:

Donor:

New record

Name:

Category:

Subcategory:

Description:

Value:

Minimum bid:

Donation date:

Expiration date:

Donor:

Adjustment information

Adjusted date:

Adjusted post date:

Adjustment description:

Adjustment reason:

OK Cancel

Note: The fields under **Original record** are inactive, and serve as a comparison to the original auction item record if changes were made to an existing auction item in *AuctionMaestro Pro*.

- For a new auction item, in the **Item** field, click the binoculars to search for and locate an auction item for which the new item should be associated.
For an auction item that already exists, the field is inactive.
- Under **New record**, for a new auction item, review all of the item information fields and edit them as necessary.
For auction items that already exist, you can only edit the fields that were changed in *AuctionMaestro Pro*.
- Under **Adjustment information**, the fields only become active if an existing auction item's donor, value, designation, and post date were changed during the auction. Review and edit these fields as necessary.
- Click **OK**. You return to the Batch screen.

Review Item Screen

The table below explains the items on the Review item screen. For more information about how to access this screen, see Review Auction Items on page 111.

Screen Item	Description
Item	Click the binoculars to search for and select an item already in your database.
Name	Enter a unique name to help identify the package.
Category and Subcategory	Enter the category and subcategory to group the item with similar items. Your organization configures the item categories to best meet the needs of your auctions. For information about how to configure item categories and subcategories, see the <i>Events Guide</i> .

Screen Item	Description
	For information about how to configure item categories and subcategories, see the Auctions section of the help file.
Description	Enter a unique name to help identify the package.
Value	Enter the fair market value of the item.
Minimum bid	Enter the monetary amount at which to start bids for the item.
Donation date	Select the date your organization receives the item as a donation.
Expiration date	If the item are applicable only within a specific time period, select the date at which the package expires.
Donor	Click the binoculars to search for and select a donor or different donor to associate with the item if necessary.
Adjusted date	Enter the date to associate with the adjustment. By default, the program automatically enters the current date in this field.
Adjusted post date	Enter the date to associate with the posting of the adjustment in the general ledger. By default, the program automatically enters the current date in this field.
Adjustment description	Enter a description of the adjustment if necessary.
Adjustment reason	Select the reason code to explain the need for the adjustment.

Review Auction Item Packages

If an auction item package is updated or edited during the auction in *AuctionMaestro Pro*, you can review the edited package data before you commit the AuctionMaestro Pro Import Batch. You can leave the information as it appears to accept the changes or edit them as necessary from the Review constituent screen.

Note: You can only edit the information about the auction item package that was changed in *AuctionMaestro Pro*.

► Review packages

1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.

Record type	Automatch status	Import messages	Record summary
► Constituent	There were no matches for this constituent.		New individual: Bob Sagat
Constituent			Updated individual: Douglas Dykstra
Event registrant		The import does not support more than one attendee per registrant record	Registration for: Bob Sagat - \$240.00
Auction package			Updated package: Kyle's auction package
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$240.00 Cash from Bob Sagat for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$120.00 Cash from Gina Dykstra for one purchase
Auction purchase		The imported payment method was not specified. Using cash as the payment method.	\$55.00 Cash from Gina Dykstra for one purchase

2. Select a row with a Record type of Auction package, and click the **Review changes** button on the menu bar. The Review package screen appears. For more information about the items on this screen, see Review Package Screen on page 114.

Note: The fields under **Original record** are inactive, and serve as a comparison to the original package record if changes were made in *AuctionMaestro Pro*.

3. In the **Package** field, click the binoculars to search for and select a package that already exists in your database.
4. Under **New record**, edit the auction item package information as necessary.
5. Click **OK**. You return to the Batch screen.

Review Package Screen

The table below explains the items on the Review package screen. For more information about how to access this screen, see Review Auction Item Packages on page 113.

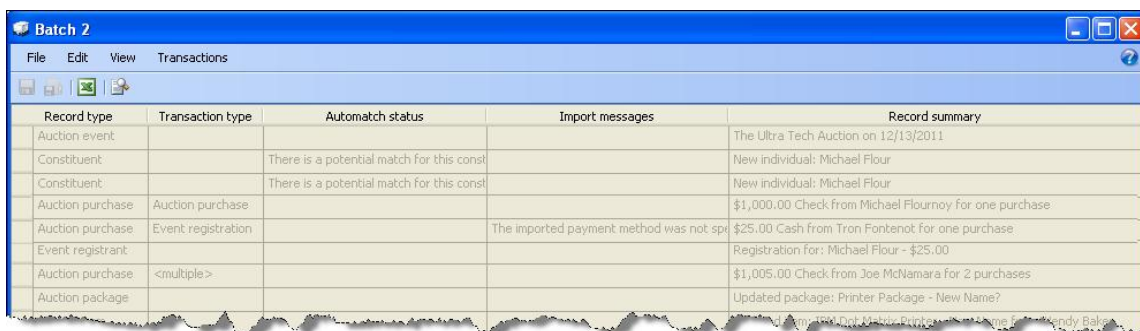
Screen Item	Description
Package	Click the binoculars to search for and select a package already in your database.
Name	Enter a unique name to help identify the package.
Category and Subcategory	Enter a category and subcategory to group the package with similar packages or items. Your organization configures the item categories to best meet the needs of your auctions. For information about how to configure item categories and subcategories, see the <i>Events Guide</i> . For information about how to configure item categories and subcategories, see the Auctions section of the help file.
Description	To further identify the package, enter a description of it or the items it contains.
Minimum bid	Enter the monetary amount at which to start bids for the package.
Expiration date	If the package or its items are applicable only within a specific time period, select the date at which the package expires.

Review Payments

You can review all payments made during the auction in *AuctionMaestro Pro*, such as for auction item or package purchases, event registrations, and donations. You can review the new or edited payment data before you commit the AuctionMaestro Pro Import Batch. Leave the information as it appears to accept the changes, or edit them as necessary from the Review constituent screen.

► Review packages

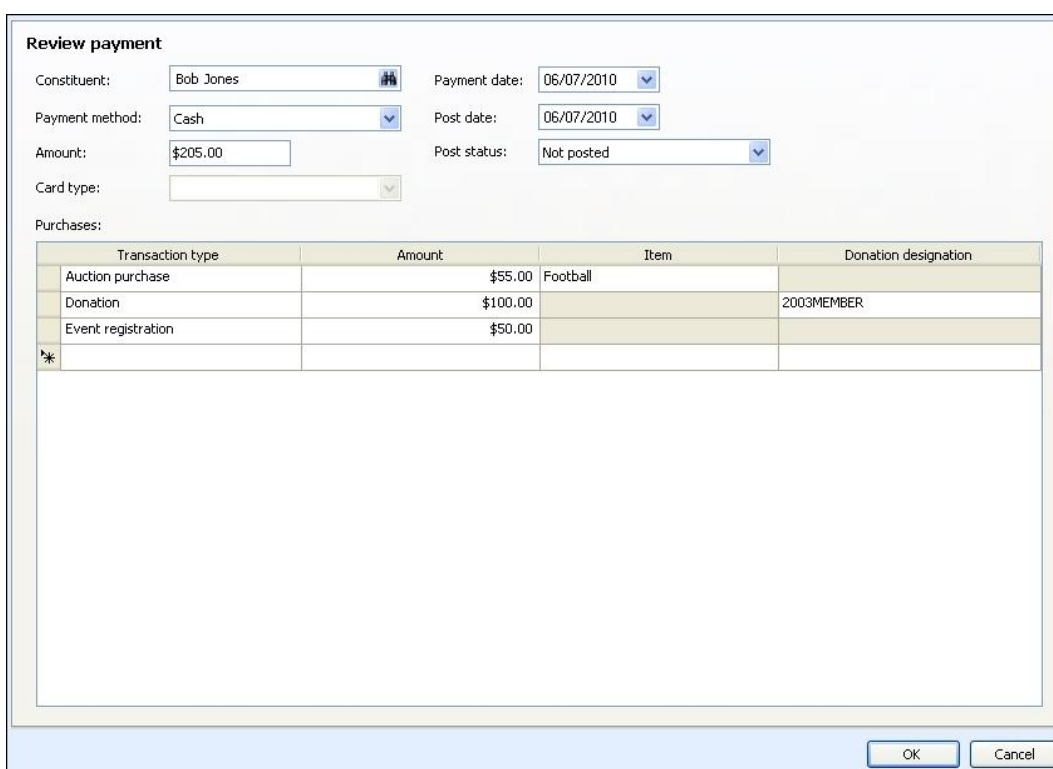
1. On the Batch Entry page, select the auction batch to review and click **Edit** on the action bar, and select **Edit batch**. The Batch screen appears.





The screenshot shows a window titled 'Batch 2' with a menu bar (File, Edit, View, Transactions) and a toolbar. Below is a table with the following data:



Record type	Transaction type	Automatch status	Import messages	Record summary
Auction event				The Ultra Tech Auction on 12/13/2011
Constituent		There is a potential match for this const		New individual: Michael Flour
Constituent		There is a potential match for this const		New individual: Michael Flour
Auction purchase	Auction purchase			\$1,000.00 Check from Michael Flournoy for one purchase
Auction purchase	Event registration		The imported payment method was not spe	\$25.00 Cash from Tron Fontenot for one purchase
Event registrant				Registration for: Michael Flour - \$25.00
Auction purchase	<multiple>			\$1,005.00 Check from Joe McNamara for 2 purchases
Auction package				Updated package: Printer Package - New Name?


2. Select a row with a Record type of Auction purchase, and click the **Review changes** button on the menu bar. The Review payment screen appears. For more information about the items on this screen, see Review Payment Screen on page 116.




The screenshot shows the 'Review payment' screen with the following fields and table:


Constituent:  Payment date: 

Payment method:  Post date: 

Amount: Post status: 

Card type: 

Purchases:

Transaction type	Amount	Item	Donation designation
Auction purchase	\$55.00	Football	
Donation	\$100.00		2003MEMBER
Event registration	\$50.00		
			

OK Cancel

3. In the **Constituent** field, click the binoculars to search for and select a different constituent for which the purchase or payments should be associated if necessary.
4. Select a different payment method, enter a different payment amount, and select a different card type if necessary.
5. Enter a new payment date to associate with the payment if necessary.

6. Select a post status and post date for which to associate with the posting of the payments in the general ledger if necessary.
7. In the **Purchases** grid, review or edit the information for each purchase or payment as necessary. You can also add new purchases or payments, such as if a purchase was not recorded during the auction.
8. Click **OK**. You return to the Batch screen.

Review Payment Screen

The table below explains the items on the Review payment screen. For more information about how to access this screen, see *Review Payments* on page 114.

Screen Item	Description
Constituent	Click the binoculars to search for a constituent to associate with the payments.
Payment method	The payment method that was recorded in <i>AuctionMaestro Pro</i> appears by default. To select a different payment.method, select it from the dropdown list.
Amount	The total payment amount recorded in <i>AuctionMaestro Pro</i> appears by default. You can enter a new payment amount if necessary.
Card type	If the payment method accept was Credit card, the type of card used appears by default. You can select a different card type from the dropdown list if necessary. If the payment method was Cash or Check, this field is inactive.
Payment date	By default, the date the payment was recorded appears. Enter a new date if necessary.
Post date and Post status	Select a post date and post status to associate with the payment.
Purchases	<p>In the Purchases grid, all purchases and payments that were made in <i>AuctionMaestro Pro</i> for the constituent appear.</p> <p>In the Transaction type column, the type of transaction for which a payment was made appears, such as Auction purchase, Donation, or Event registration. To add another transaction for which to add a payment, click a blank row in the column and select the transaction type from the dropdown list.</p> <p>In the Amount column, the amount of the payment appears. To edit the payment, select the cell and enter a new payment amount.</p> <p>In the Item column, the name of the item that was purchased appears. Click the binoculars to search for and select a different auction item or package. For transactions of all other types, this column is inactive.</p> <p>In the Donation designation column, the designation for which donations and fund-an-item donations should be applied appears. Click the binoculars to search for and select a different designation to which the donation should be applied.</p>

Blackbaud Internet Solutions Integration Batch Data Entry Tasks

If your organization integrates with **Blackbaud Internet Solutions**, you can download web transactions from **Blackbaud Internet Solutions** into uncommitted batches. In *Batch entry*, you can manage these batches and view the details of each transaction.

- From **Blackbaud Internet Solutions**, you can download transactions such as donations, event registrations, and user sign-up requests. When you download transactions from **Blackbaud Internet Solutions**, you can view the details of each transaction and select which information to commit to your database. For information about how to view the details of a downloaded transaction, see *View the Details of a Blackbaud Internet Solutions Transaction* on page 117.

Note: For information about how to download information from **Blackbaud Internet Solutions**, see the *Blackbaud Internet Solutions Integration Guide*.

- Except for fundraiser transactions, you can also assign the constituent information included in a downloaded **Blackbaud Internet Solutions** transaction to a specific security group. For information about how to assign constituent information to a security group, see *Assign Constituent Information in a Blackbaud Internet Solutions Transaction to a Security Group* on page 119.

View the Details of a Blackbaud Internet Solutions Transaction

When you download transactions from **Blackbaud Internet Solutions**, they download into uncommitted batches. From a **Blackbaud Internet Solutions** transaction batch, you can view details about a transaction. When you view the transaction detail, you can select the information to use to create or update records in your database. To view transaction detail information, select the transaction on the batch data entry screen and select **Transactions, Review transaction details** on the menu bar.

Note: To view the details of a **Blackbaud Internet Solutions** transaction on the batch data entry screen, you can also click **Review transaction details** on the toolbar or press **CTRL + T** on the keyboard.

- For a donation transaction, an event registration, or a sign-up request, the Review transaction data screen appears and displays the information downloaded from **Blackbaud Internet Solutions**.

Review transaction data for Tabitha Murray

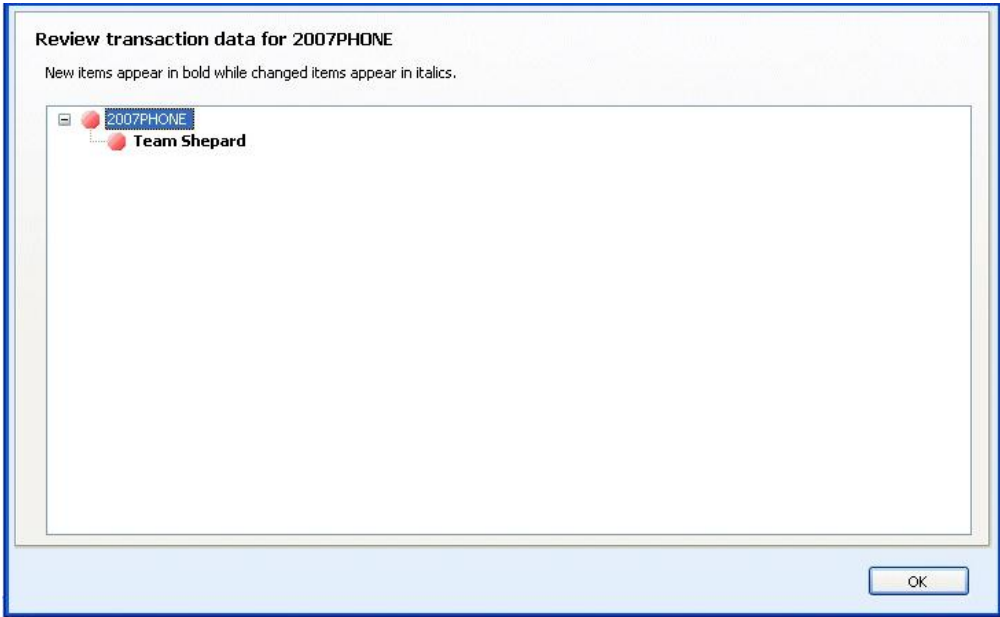
Biographical Billing Address Payment Registrations Guests

Clear All ☒ Select All

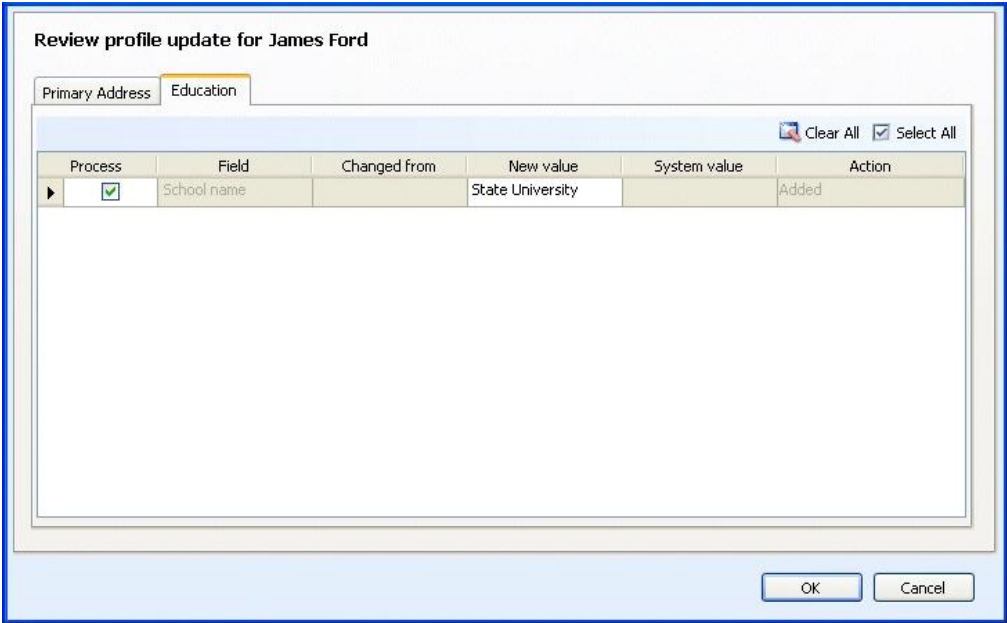
Process	Field	New value	System value	Action
<input checked="" type="checkbox"/>	Title	Ms.		Added
<input checked="" type="checkbox"/>	First name	Tabitha		Added
<input checked="" type="checkbox"/>	Last name	Murray		Added
<input checked="" type="checkbox"/>	Phone (Type: Vacation Home)	(859) 555-3454		Added
<input checked="" type="checkbox"/>	Email (Type: Email)	tabbycat@murray.net		Added

OK Cancel

- For a fundraiser transaction, the Review transaction data screen appears and displays a tree-view of the changes or additions to the fundraiser appeal.



- For a user profile update transaction, the Review profile data screen appears and displays the new or changed information downloaded from **Blackbaud Internet Solutions**.



For more information about how to review the detail information about a **Blackbaud Internet Solutions** transaction, see the *Blackbaud Internet Solutions Integration Guide*.

Assign Constituent Information in a Blackbaud Internet Solutions Transaction to a Security Group

When you download transactions from *Blackbaud Internet Solutions*, they download into uncommitted batches. From a *Blackbaud Internet Solutions* transaction batch, you can assign the constituent information downloaded with a transaction to a security group. When you assign constituent information to a security group, only users in that group can access and manage the constituent records created with the transaction information. To assign constituent information in a transaction to a security group, select the transaction on the batch data entry screen and select **Transactions, Set up constituent security groups** on the menu bar. The Set up constituent security groups screen appears.



Note: You cannot assign constituent information downloaded with a fundraiser transaction to a security group.

For more information about how to assign constituent information in a *Blackbaud Internet Solutions* transaction to a security group, see the *Blackbaud Internet Solutions Integration Guide*.

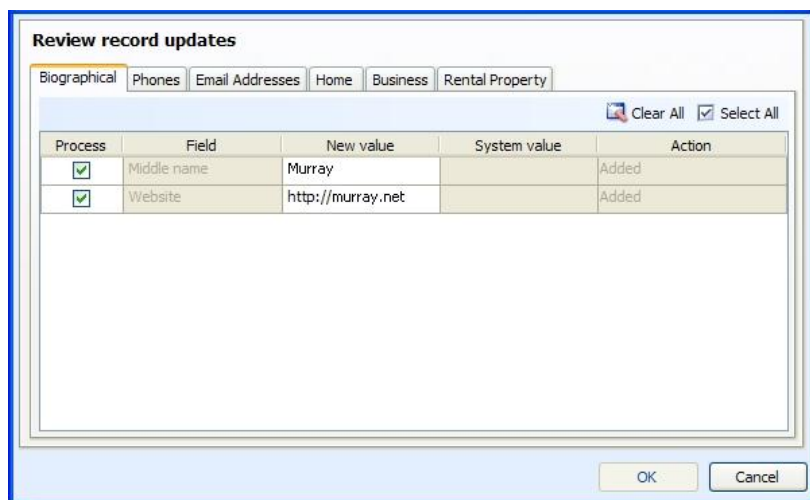
Microsoft Exchange Integration Batch Data Entry Tasks

With Microsoft *Exchange* server integration, you can download calendar items, email messages, and contact record updates from Microsoft *Outlook*. When you download updates from Microsoft *Outlook*, you can select the items to commit to your database. When you download contact record updates, you can also view the details of each update and select which information to commit to your database. For information about how to view the details of a downloaded contact record update, see [View the Details of a Microsoft Outlook Contact Record Update](#) on page 119.

Note: For information about how to download information from Microsoft *Outlook*, see the *Microsoft Exchange Integration Guide*.

View the Details of a Microsoft Outlook Contact Record Update

When you download contact record updates from Microsoft *Outlook*, they download into uncommitted batches. From an *Exchange* contact update batch, you can view details about the contact record updates. When you view the record update details, you can select the information to use to update records in your database. To view the details of a contact record update, select the update on the batch data entry screen and select **Updates, Review record updates** on the menu bar. The Review record updates screen appears and displays the new or changed information downloaded from Microsoft *Outlook*. The tabs that appear depend on the fields updated in *Outlook*.



Note: To view the details of a Microsoft *Outlook* contact record update on the batch data entry screen, you can also click the **Review record updates** icon on the toolbar or press **CTRL + U** on the keyboard.

For more information about Microsoft *Outlook* contact record updates, see the *Microsoft Exchange Integration Guide*.

MatchFinder Online Integration Batch Data Entry Tasks

From the *MatchFinder Online* database, you can download matching gift company information for organization constituents not currently linked to a *MatchFinder Online* record. When you download organization constituent updates from *MatchFinder Online*, you can view the details of each update and select which information to commit to your database. For information about how to view the details of a downloaded organization constituent update, see View the Details of a MatchFinder Online Organization Constituent Update on page 120.

Note: For information about how to download information from *MatchFinder Online*, see the “MatchFinder Online Integration” chapter of the *Revenue Guide*.

View the Details of a MatchFinder Online Organization Constituent Update

When you download information about organization constituents from the *MatchFinder Online* database, they download into uncommitted batches. From a *MatchFinder Online* batch, you can view details about the *MatchFinder Online* information. When you view the details, you can also select which information to update on the organization constituent record. To view the details of *MatchFinder Online* information, select the constituent on the batch data entry screen and select **Details, Show details form** on the menu bar. The Update constituent screen appears.

Update constituent

☒ Update all ☐ Update none

Organization Contact info Matching conditions

Update	Current value	MatchFinder Online value
<input type="checkbox"/>	Organization name	No updates to process (Ladd Transportation)
<input type="checkbox"/>	Details	Ladd Furniture

Alias
☒

Industry
☐ No updates to process (Manufacturing)

OK Cancel

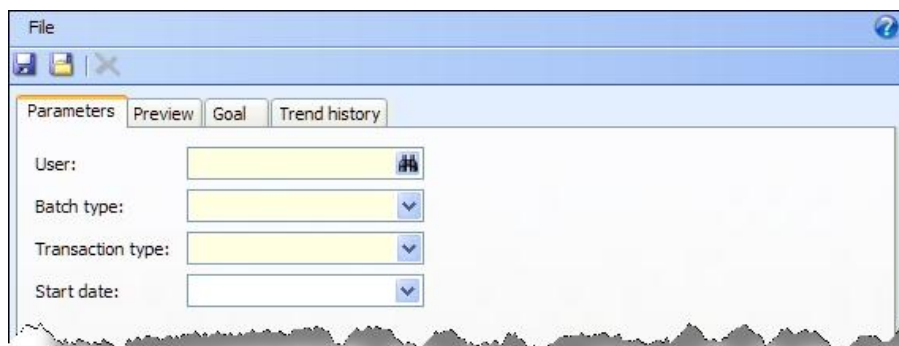
Note: To access the Update constituent screen for a selected constituent in a *MatchFinder Online* batch, you can also click the **Show details form** icon on the toolbar or press **CTRL + T** on the keyboard.

When you view the *MatchFinder Online* detail, you can also specify which information to use to link to and update the organization constituent in your database.

For more information about how to review the detail information in a *MatchFinder Online* batch, see the “MatchFinder Online Integration” chapter of the *Revenue Guide*.

Batch Statistics Key Performance Indicator

From *Analysis*, you can create a key performance indicator (KPI) to view the effectiveness of batch data entry by an application user. When you create a Batch Statistics KPI, you select the user for whom to view activity and the type of batch and transactions – such as adds, changes, committals, or exceptions – to include. You can also select the start date of the batch activity to use to generate the KPI.



For information about how to add KPI instances, see the *Analysis Guide*.

Generate Revenue Update Batch

You can use the Generate revenue update batch process to make revenue changes to multiple transactions at one time. A regular update batch requires manual entry of each individual transaction you want to change, whereas an update batch created from the Generate revenue update batch process allows you to populate the revenue update batch with multiple revenue transactions.

You access the **Generate revenue update batch** task from main Revenue page.

Add a Generate Revenue Update Batch Process

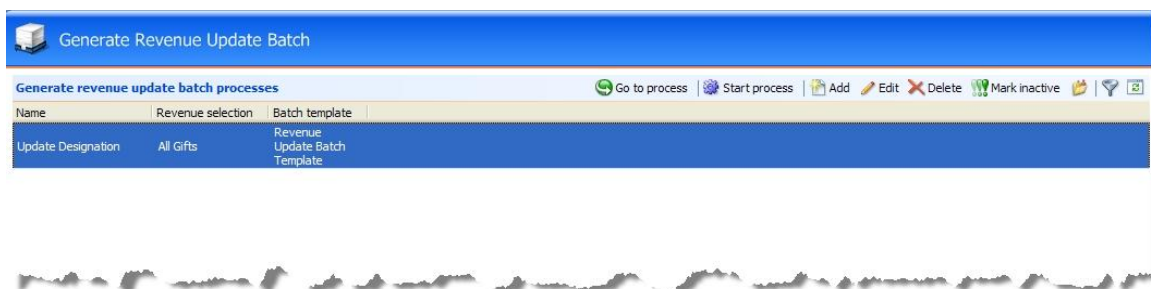
To create a revenue update batch from the Generate revenue update batch process, you must first create the business process. You create and manage Generate revenue update batch processes from the Generate Revenue Update Batch page. From this page, you can add, edit, mark as active/inactive, and start your Generate revenue update batch processes.

Depending on your security rights and system role, you can also delete processes from this page.

To access the Generate Revenue Update Batch page, select **Generate revenue update batch** under **Processing** on the Revenue page.

► Add a generate revenue update batch process

1. From the Revenue page, select **Generate revenue update batch** under **Processing**. The Generate Revenue Update Batch page appears.



2. Select **Add** on the action bar. The Generate revenue update batch screen appears.

Generate revenue update batch

Name:

Batch template:

Batch number: ☐ Override

Description:

Owner:

☐ Enable auto save

Projected #:

Projected amount:

Filters

Revenue selection:

☐ Filter selection and overwrite with new value

Filter by:

Current value:

Overwrite with:

Adjustment details

☐ Include posted transactions

Adjustment date:

Adjustment reason:

Adjustment post date:

Adjustment details:

Adjustment post status:

3. In the **Name** field, enter a unique name for the batch.
4. In the **Batch template** field, select the template for this batch. Your choices include any templates associated the Revenue Update Batch type.
5. In the **Batch number** field, enter a unique number to identify the batch. After you save a batch, you can no longer use its number to identify a new batch. If you enter a number that another batch uses, when you click **Save**, a message appears to remind you that the batch number must be unique. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark **Override**.
6. In the **Description** field, enter a unique description to identify the batch. The description appears in the **Uncommitted batches** grid so you can determine the purpose of the batch before you open it.
7. In the **Owner** field, select the user who owns the batch in its initial status.

Note: The program automatically assigns the person creating the batch as the batch owner. The selected owner owns the batch in its initial status. When you update the status of a batch, you can assign the batch to a new owner. For information about how to update a batch status, see [Update a Batch to the Next Workflow Status](#) on page 52.

8. Mark **Enable auto-save** if you want the batch to automatically save each row as you work.
9. If the selected batch template is for a revenue batch, the **Projected #** and **Projected amount** fields are enabled. Enter the total number of payments you plan to enter in the batch and the total projected monetary value of those payments.
10. In the **Revenue selection** field, enter the selection that contains transaction records you want to update. You can use the Selection Search to locate an existing selection, or to add a new selection. If the selection is created from an ad-hoc query or a smart query instance, you can click the pencil icon to edit the query used to generate the selection.
11. Mark **Filter selection and overwrite with new value** if you are globally changing the same field on the transaction records to a new value and you want the value to be the same. When you select this option,

the selection is filtered to include only the items with the current value. Do not mark this checkbox if you are editing a variety of fields with different values. When you mark this checkbox, the following fields are enabled:

- In the **Filter by** field, select the field you want to change. Your choices include “Appeal,” “Campaign,” “Date,” “Designation,” and “Solicitor.”
 - In the **Current value** field, enter current value of the field you want to change.
 - In the **Overwrite with** field, enter the new value with which you want to overwrite the existing value. To make locating the field easier, you can select the magnifying glass icon to access the search screen.
12. Under **Adjustment details**, mark **Include posted transactions** if the records you are updating include transactions that have already posted. Do not mark this checkbox if you are making changes to records that have not yet posted. When you mark this checkbox, the following fields are enabled:
- In the **Adjustment date** field, enter the date to associate with the adjustment to the posted transaction. If you leave this field blank, it will default to the date you run the process.
 - In the **Adjustment post date** field, enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.
 - In the **Adjustment post status** field, select “Not posted” or “Do not post” as the post status for the adjustment.
 - In the **Adjustment reason** field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.
 - In the **Adjustment details** field, enter any additional information about the adjustment.
13. Select **Save** to save the process and return to the Generate Revenue Update Batch page. The new process appears in the grid. For information on running a Generate revenue update batch process, see Run a Generate Revenue Update Batch Process on page 126.

Generate Revenue Update Batch Screen

The table below explains the items on the Generate revenue update batch screen. For more information about how to access this screen, see Add a Generate Revenue Update Batch Process on page 122.

Screen Item	Description
Name	Enter a unique name for the batch.
Batch template	<p>Select the batch template to use to create the batch. The batch template defines the fields and any default values used in the batch.</p> <p>Typically, a batch processing manager creates the batch template. If the batch template you want does not appear, consult your batch processing manager. For information about how to add a batch template, see the Batch Configuration chapter or the Batch Configuration section of the help file.</p> <p>You can adjust the fields and default settings selected for the batch template. To adjust the fields included in the selected batch template, click Field options. The Customize fields for batch screen appears. For information about the items on this screen, see Customize Fields For Batch Screen on page 73.</p> <p>After you add the batch to the database, you cannot change its selected batch template.</p>
Batch number	<p>Select whether to use an automatically generated number or a custom number to identify the batch. When you open a batch, the batch number appears in the top corner of the screen. On the Batch Entry page, the batch number appears next to each corresponding batch in the grids.</p> <p>If you selected “Auto-generated” when creating the number scheme, the program uses</p>

Screen Item	Description
	<p>the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark Override. For information about batch numbering schemes, see the Batch Configuration chapter or the Batch Configuration section of the help file.</p> <p>If you selected “Manual”, enter a unique number to identify the batch in the field. Once you save a batch, you can no longer use its batch number to identify a new batch.</p> <p>After you add the batch to the database, you cannot automatically generate a new number for the batch.</p>
Description	<p>Enter a description to help identify the batch and explain why you enter the records in the database. You can enter up to 255 characters in this field.</p> <p>The description you enter appears in the Uncommitted batches grid so you can determine the purpose of the batch before you open it.</p>
Owner	<p>Select the user to process the batch in its initial status.</p> <p>The user you select in this field owns the batch in its initial status. When you update the status of the batch to next status in the workflow, you can assign it to a new owner. For more information about how to update the status of a batch, see Update a Batch to the Next Workflow Status on page 52.</p> <p>You can configure system alerts to automatically notify application users by email when they become batch owners. For information about how to configure system alerts for batches, see the <i>Administration Guide</i>.</p>
Enable auto-save	Mark Enable auto-save if you want the batch to automatically save each row as you work.
Projected #	<p>When the selected batch template is for a revenue batch, the Projected # field is enabled. Enter a total number of payment records you plan to enter in the batch. The batch allows an unlimited number of records. For example, you create a batch for the payments you received on the previous day. You received a total of ten payments yesterday, so you enter “10”.</p> <p>Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.</p>
Projected amount	<p>When the selected batch template is for a revenue batch, the Projected amount field is enabled. Enter the projected monetary amount for the payment records you plan to enter in the batch. For example, you create a batch for the payments you received on the previous day. You received payments totalling \$500 yesterday, so you enter “\$500”.</p> <p>Although this field is not required, we recommend you enter a projected value. When you validate the batch, you can use your projections to determine the accuracy of the data entry.</p>
Revenue selection	Enter the selection that contains transaction records you want to update. You can use the Selection Search to locate an existing selection, or to add a new selection. If the selection is created from an ad-hoc query or a smart query instance, you can click the pencil icon to edit the query used to generate the selection.
Filter selection and overwrite the new value	<p>Mark this checkbox if you are globally changing the same field on the transaction records to a new value and you want the value to be the same. When you select this option, the selection is filtered to include only the items with the current value. Do not mark this checkbox if you are editing a variety of fields with different values. When you mark this checkbox, the following fields are enabled:</p> <p>In the Filter by field, select the field you want to change. Your choices include “Appeal,” “Campaign,” “Date,” “Designation,” and “Solicitor.”</p> <p>In the Current value field, enter current value of the field you want to change. To make locating the field easier, you can select the magnifying glass icon to access the search screen.</p> <p>In the Overwrite with field, enter the new value with which you want to overwrite the existing value. To make locating the field easier, you can select the magnifying glass icon to access the search screen.</p>
Include	Mark this checkbox if the records you are updating include transactions that have already

Screen Item	Description
posted transactions	<p>posted. Do not mark this checkbox if you are making changes to records that have not yet posted. When you mark this checkbox, the following fields are enabled:</p> <p>In the Adjustment date field, enter the date to associate with the adjustment to the posted transaction. If you leave this field blank, it will default to the date you run the process.</p> <p>In the Adjustment post date field, enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.</p> <p>In the Adjustment post status field, select “Not posted” or “Do not post” as the post status for the adjustment.</p> <p>In the Adjustment reason field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.</p> <p>In the Adjustment details field, enter any additional information about the adjustment.</p>

Edit a Generate Revenue Update Batch Process

After you create a Generate revenue update batch process, you may need to update its information. For example, you may need to update its description or create a new revenue selection.

► Edit a Generate revenue update batch process

1. On the Generate Revenue Update Batch page, select the Generate revenue update batch process to update in the **Generate revenue update batch processes** grid.
2. On the action bar, click **Edit**. The Generate revenue update batch screen appears. For information about the items on this screen, see *Generate Revenue Update Batch Screen* on page 124.

Note: You can also edit a Generate revenue update batch process from its parameters page. From the explorer bar, click **Edit process** under **Tasks**. The Generate revenue update batch process screen appears.

3. Update the information as necessary.
4. Click **Save**. You return to the Generate Revenue Update Batch page.

Delete a Generate Revenue Update Batch Process

On the Generate Revenue Update Batch page, you can delete a specific Generate revenue update batch process. When you delete a Generate revenue update batch process, you delete the process and all of its history. Before you delete a process, we strongly recommend you back up your data.

► Delete a Generate revenue update batch process

1. On the Generate Revenue Update Batch page, select the Generate revenue update batch process to delete in the **Generate revenue update batch processes** grid.
2. On the action bar, click **Delete**. A message appears to verify the deletion of the process.

Note: You can also delete a Generate revenue update batch process from its parameters page. From the explorer bar, click **Delete process** under **Tasks**. A message appears to verify the deletion of the process.

3. Click **Yes**. You return to the Generate Revenue Update Batch page.

Run a Generate Revenue Update Batch Process

When you run a Generate revenue update batch process, the program uses the data in the batch to automatically update records in the database. On the Batch Entry page, you can view the batches the process

commits on the Committed batches tab.

► **Start a Generate revenue update batch commit process**

1. On the Generate Revenue Update Batch page, select the Generate revenue update batch process to run in the **Generate revenue update batch processes** grid.
2. On the action bar, click **Start process**. The Run generate revenue update batch process screen appears.

Note: You can also start a Generate revenue update batch process from its parameters page. From the explorer bar, click **Start process** under **Tasks**.

Run generate revenue update batch process

Process name: Update Designation

Batch number: <Next available batch number> ☐ Override ☒ Filter selection and overwrite with new value

Revenue selection: All Gifts

Filter by: Designation

Current value: 2000ANNUAL

Override with: TCM1

☒ Include posted transactions

Adjustment date:

Adjustment post date:

Adjustment post status: Not posted

Adjustment reason: 1 - test

Adjustment details:

3. In the **Batch number** field, enter a unique number to identify the batch. Once you save a batch, you can no longer use its number for batches using the template. If you enter a number that another batch uses, when you click **Save**, a message appears to remind you that the batch number must be unique. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark **Override**.
4. In the **Revenue selection** field, verify the selection contains transaction records you want to update.
5. Mark **Filter selection and overwrite with new value** if you are globally changing the same field on the transaction records to a new value and you want the value to be the same. When you select this option, the selection is filtered to include only the items with the current value. Do not mark this checkbox if you are editing a variety of fields with different values. When you mark this checkbox, the following fields are enabled:
 - In the **Filter by** field, select the field you want to change. Your choices include “Appeal,” “Campaign,” “Date,” “Designation,” and “Solicitor.”
 - In the **Current value** field, enter current value of the field you want to change.
 - In the **Override with** field, enter the new value with which you want to overwrite the existing value. To make locating the field easier, you can select the magnifying glass icon to access the search screen.
6. Mark **Include posted transactions** if the records you are updating include transactions that have already posted. Do not mark this checkbox if you are making changes to records that have not yet posted. When you mark this checkbox, the following fields are enabled:

- In the **Adjustment date** field, enter the date to associate with the adjustment to the posted transaction. If you leave this field blank, it will default to the date you run the process.
- In the **Adjustment post date** field, enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.
- In the **Adjustment post status** field, select “Not posted” or “Do not post” as the post status for the adjustment.
- In the **Adjustment reason** field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.
- In the **Adjustment details** field, enter any additional information about the adjustment.

Note: If you are updating a transaction that has an existing unposted adjustment, the new update batch does not overwrite any of the adjustment fields that already exist.

7. Click **Start**. The program runs the process. When the process is complete, its parameters page appears.

Run Generate Revenue Update Batch Process Screen

The table below explains the items on the Run generate revenue update batch process screen. For information about how to access this screen, see Run a Generate Revenue Update Batch Process on page 126.

Screen Item	Description
Process name	This field displays the name of the Generate revenue update batch process. You enter this information when you add the process to the database. If the name displayed is not of the Generate revenue update batch process you want to run, click Cancel . You return to the Generate Revenue Update Batch page so you can select the process to run.
Batch number	Enter a unique number to identify the batch. Once you save a batch, you can no longer use its number for batches using the template. If you enter a number that another batch uses, when you click Save, a message appears to remind you that the batch number must be unique. If you selected “Auto-generated” when creating the number scheme, the program uses the numbering scheme assigned to the workflow of the selected batch template to automatically generate and assign a batch number. To manually enter a new number, mark Override .
Revenue selection	Verify the selection contains transaction records you want to update.
Filter selection and overwrite the new value	Mark this checkbox if you are globally changing the same field on the transaction records to a new value and you want the value to be the same. When you select this option, the selection is filtered to include only the items with the current value. Do not mark this checkbox if you are editing a variety of fields with different values. When you mark this checkbox, the following fields are enabled: In the Filter by field, select the field you want to change. Your choices include “Appeal,” “Campaign,” “Date,” “Designation,” and “Solicitor.” In the Current value field, enter current value of the field you want to change. To make locating the field easier, you can select the magnifying glass icon to access the search screen. In the Overwrite with field, enter the new value with which you want to overwrite the existing value. To make locating the field easier, you can select the magnifying glass icon to access the search screen.
Include posted transactions	Mark this checkbox if the records you are updating include transactions that have already posted. Do not mark this checkbox if you are making changes to records that have not yet posted. When you mark this checkbox, the following fields are enabled: In the Adjustment date field, enter the date to associate with the adjustment to the posted transaction. If you leave this field blank, it will default to the date you run the process.

Screen Item	Description
	<p>In the Adjustment post date field, enter the date you want the adjustment to post. If you leave this field blank, it will default to the date you run the process.</p> <p>In the Adjustment post status field, select “Not posted” or “Do not post” as the post status for the adjustment.</p> <p>In the Adjustment reason field, select the reason code to explain the need for the adjustment. For information about reason codes for adjustments, see the Administration section of the help file.</p> <p>In the Adjustment details field, enter any additional information about the adjustment.</p>

Mark Generate Revenue Update Batch Process Active or Inactive

Rather than delete a Generate revenue update batch process from the database, you can make it inactive. When inactive, the process is disabled and can no longer be used, and remains on the Generate Revenue Update Batch page.

To mark a Generate revenue update batch process inactive, select **Mark inactive** on the action bar of the Generate Revenue Update Batch page. To reactivate the process, select **Mark active**.

To display inactive processes in the grid, click **Filter** on the action bar. Select **Show inactive** and click **Apply**.

For information about the Generate Revenue Update Batch, see Generate Revenue Update Batch on page 122.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

► Delete a status record from the History tab

1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

► Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.

Create job

Job name:

Schedule type: ☒ Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

☒ Occurs once at:

☐ Occurs every: Minutes Starting at: Ending at:

Duration

Start date: ☐ End date: ☒ No end date

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

► Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see [Create Job Screen](#) on page 175.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

► Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process from the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Process Status Report

When you execute a process in *Sponsorships*, the process generates a status report which is housed on the Recent Status tab of the process page. For example, if you execute a sponsorship transfer the Transfer Report appears on the Recent Status tab. The report lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

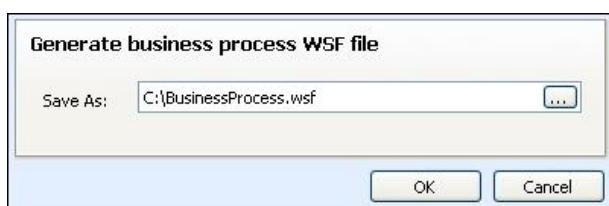
To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

► Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Commit Multiple Batches

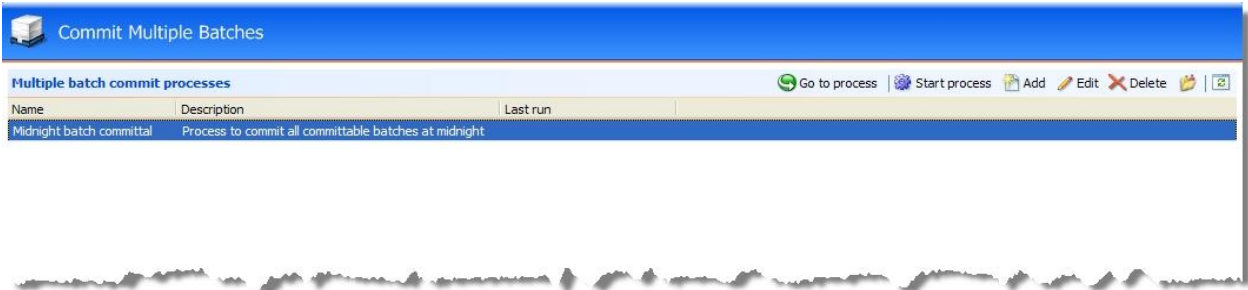
Commit Multiple Batches Page

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In *Batch entry*, you can enter and update information on multiple records at once in a batch. To add or update the records in your database with the information, you must commit the batch. On the Commit Multiple Batches page, you can create and manage processes to automatically commit multiple batches at once. Each multiple batch commit process you create has a parameters page. On the parameters page, you can view information about the most recent and previous instances of the process and create a job schedule to automatically run the process. For example, you may want to commit all available batches at a set time each day.

Commit Multiple Batches Page

On the Commit Multiple Batches page, you can view and manage your multiple batch commit processes from one central location. You can add, edit, and start your multiple batch commit processes. Depending on your security rights and system role, you can also delete processes from the Commit Multiple Batches page. To access the Commit Multiple Batches page, from the Batch page in *Administration*, click **Commit multiple batches**.



The **Multiple batches commit processes** grid lists the processes in the database and displays the name and description of each process. You enter this information when you add the multiple batch commit process to the database. The grid also displays the date and time each process last ran.

Depending on your security rights and system role, you perform many functions to manage the multiple batch commit processes in the database from the action bar.

To update the information that appears in the grid, click **Refresh List** on the action bar.

Add a Multiple Batch Commit Process

In *Batch*, you can enter and update information on multiple records at once in a batch. To add or update the records in your database with the information, you must commit the batch. From the Commit Multiple Batches page, you can create a process to automatically commit multiple batches at once.

Note: On the Batch Entry page, you can commit individual batches. For information about how to commit batches individually, see *Commit a Batch*.

► Add a multiple batch commit process

1. On the Commit Multiple Batches page, click **Add** on the action bar of the **Multiple batch commit processes** grid. The Add a multiple batch commit process screen appears. For information about the items on this screen, see Add a Multiple Batch Commit Process Screen on page 137.

Add a multiple batch commit process

Name:

Description:

Commit criteria

☒ All committable batches

☐ Selected batches

Selection:

Commit options

☐ Create exception batches ☐ Create control reports

☐ Create output selections ☐ Delete batches after commit

2. In the **Name** and **Description** fields, enter a name and description to help identify the multiple batch commit process.
3. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
4. Under **Commit criteria**, select the batches to include in the multiple batch commit process. The multiple batch commit process includes all batches in the selection that can be committed.
 - To include all batches in your database that can be committed, select **All committable batches**.
 - To include only a selection of batches, choose **Selected batches**. The **Selection** field is enabled. In the **Selection** field, click the binoculars and use the Selection Search screen to find or create the selection of batches to include in the multiple batch commit process.

Note: When you run a multiple batch commit process, it can commit only those batches you have rights to administer, as specified by the security on the batch template. If your **Criteria** selection includes batches you cannot commit, those batches generate exceptions when you run the process.

5. Under **Commit options**, specify how to handle the committal of the batches included in the process.
 - To create batches of all records in each batch that do not commit to the database, mark **Create exception batches**.
 - To create selections of all the records created in the database when you commit the batches, mark **Create output selections**.

Note: We strongly recommend you mark **Create output selections**. The output selection can be very useful. For example, you can use this selection when you create acknowledgement letters or other mailings for the constituents for whom you added payments in the batch.

- To generate a control report for each batch the process commits to the database, mark **Create control reports**. The control reports describe each committed batch and provide information about the records included in each batch.
 - To delete each batch after you commit them to the database, mark **Delete batches after commit**.
6. Click **Save**. You return to the Commit Multiple Batches page. In the **Multiple batch commit processes** grid, the new process appears.

Add a Multiple Batch Commit Process Screen

The table below explains the items on the Add a multiple batch commit process screen. For information about how to access this screen, see [Add a Multiple Batch Commit Process](#) on page 135.

Screen Item	Description
Name	Enter a name to identify the multiple batch commit process. This information appears on the Commit Multiple Batches page. You can enter up to 100 characters in this field. The name of each multiple batch commit process must be unique.
Description	Enter a detailed description to help identify the multiple batch commit process. For example, you can describe which batches the process commits, such as "All committable revenue batches." This information appears on the Commit Multiple Batches page. You can enter up to 255 characters in this field.
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Commit criteria	In the Commit criteria frame, select the batches to include in the multiple batch commit process. The process will include all batches in the selection that can be committed. To include all batches in your database, select All committable batches . To include a selection of batches, choose Selected batches . The Selection field is enabled. Click the binoculars and use the Selection Search screen to find or create the selection that contains the committable batches to include in the process. If the selection is created from an ad-hoc query or a smart query instance, you can click the pencil icon to edit the query used to generate the selection. When you run a multiple batch commit process, it can commit only those batches you have rights to administer. If your Commit criteria selection includes batches you do not have rights to commit, those batches create exceptions when you run the batch. When you run the multiple batch commit process, you can change your selection as necessary.
Create exception batches	To create new batches of all records in each batch that does not commit, mark Create exception batches . When you run the multiple batch commit process, you can change your selection as necessary.
Create output selections	To create a query of all batches the process commits to the database, mark Create output selections . When you run the multiple batch commit process, you can change your selection as necessary. We recommend you create an output selection query, which you can use when you create a mailing for the constituents for whom you added payments in a revenue batch.
Create control reports	To create a control report after the process commits each batch to the database, mark this checkbox. The control reports describe the committed batches and provide information about the records included in each batch. When you run the multiple batch commit process, you can change your selection as necessary.
Delete batches	To delete each batch file after the process commits it to the database, mark Delete batches after commit . To reduce the size of your database, you may want to mark this

Screen Item	Description
after commit	checkbox. When you run the multiple batch commit process, you can change your selection as necessary.

View a Multiple Batch Commit Process Parameters Page

When you create a multiple batch commit process, the program creates a parameters page of the process. The parameters page contains all the criteria used to create the multiple batch commit process, information about the most recent instance of the process, historical information about the process, and the schedule of the job outputs.

On the Commit Multiple Batches page, the **Multiple batch commit processes** grid lists the multiple batch commit processes available in the database.

To view the parameters page of a multiple batch commit process, select the process in the grid and click **Go to process**. For information about the items on a multiple batch commit process parameters page, see *Tabs of a Process Status Page* on page 141.

Edit a Multiple Batch Commit Process

After you create a multiple batch commit process, you may need to update its information. For example, you may need to update its description or select to create an output selection.

► Edit a multiple batch commit process

1. On the Commit Multiple Batches page, select the multiple batch commit process to update in the **Multiple batch commit processes** grid.
2. On the action bar, click **Edit**. The Edit multiple batch commit process screen appears. The items on this screen are the same as on the Add a multiple batch commit process screen. For information about the items on this screen, see *Add a Multiple Batch Commit Process Screen* on page 137.

Note: You can also edit a multiple batch commit process from its parameters page. From the menu bar, select **Tasks, Edit process**. From the explorer bar, click **Edit process** under **Tasks**. The Edit multiple batch commit process screen appears.

Edit multiple batch commit process

Name:

Description:

Commit criteria

☒ All committable batches

☐ Selected batches

Selection:

Commit options

☐ Create exception batches ☐ Create control reports

☐ Create output selections ☐ Delete batches after commit

3. Update the information as necessary.
4. Click **Save**. You return to the Commit Multiple Batches page.

Delete a Multiple Batch Commit Process

On the Commit Multiple Batches page, you can delete a specific multiple batch commit process. When you delete a multiple batch commit process, you delete the process and all of its history. Before you delete a process, we strongly recommend you back up your data.

► Delete a multiple batch commit process

1. On the Commit Multiple Batches page, select the multiple batch commit process to delete in the **Multiple batch commit processes** grid.
2. On the action bar, click **Delete**. A message appears to verify the deletion of the process.

Note: You can also delete a multiple batch commit process from its parameters page. From the menu bar, select **Tasks, Delete process**. From the explorer bar, click **Delete process** under **Tasks**. A message appears to verify the deletion of the process.

3. Click **Yes**. You return to the Commit Multiple Batches page.

Run a Multiple Batch Commit Process

When you run a multiple batch commit process, the program commits the selected committable batches that you have rights to commit. When the process commits a batch, the program uses the data in the batch to automatically create or update records in the database. On the Batch Entry page, you can view the batches the process commits on the Committed batches tab.

► Start a multiple batch commit process

1. On the Commit Multiple Batches page, select the multiple batch commit process to run in the **Multiple batch commit processes** grid.
2. Click **Start process**. The Run multiple batch commit process screen appears.

Note: You can also start a multiple batch commit process from its parameters page. From the menu bar, select **Tasks, Start process**. From the explorer bar, click **Start process** under **Tasks**. The Run multiple batch commit process screen appears. For information about the parameters page, see *Tabs of a Process Status Page* on page 141.

3. Under **Commit criteria** and **Commit options**, view which batches are included in the process and how the committal of those batches is to be handled. You select these options when you add the process to the database. Update this information as necessary.
4. Click **Start**. The program runs the process. When the process is complete, its parameters page appears. For information about the items on the process parameters page, see *Tabs of a Process Status Page* on page 141.

Assign Permissions for a Multiple Batch Commit Process

After you add a multiple batch commit process, you can assign permissions to the roles who can use the process. When you assign permissions for the process, you can select to allow all roles to use the process or only select roles.

► Assign permissions for a multiple batch commit process

1. On the Commit Multiple Batches page, select a process and click **Assign permissions**. The Assign permissions screen appears.
2. In the **Site** field, select the site or sites you want to associate with this process.
3. Select whether all roles or only selected roles may access the process.

If you select **Selected roles**, select the permissions for the roles in the **System roles** box.

- To grant a role access, select it in the box and click **Grant** on the action bar.
- To deny a role access, select it in the box and click **Deny** on the action bar.
- To remove an existing permission assignment from a role, select it in the box and click **Clear** on the action bar.

4. Click **Save**. You return to the Commit Multiple Batches page.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance of the process and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

► Delete a status record from the History tab

1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the

funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

► Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.

Create job

Job name:

Schedule type: ☒ Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

☒ Occurs once at:

☐ Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: ☒ No end date

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.

4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

► Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see [Create Job Screen](#) on page 175.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

► Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process from the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

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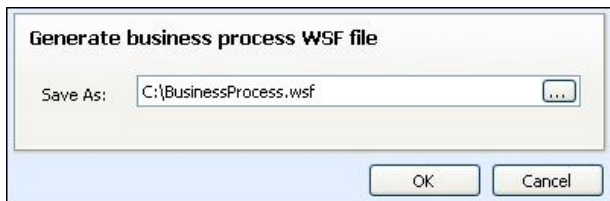
To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

► Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Import

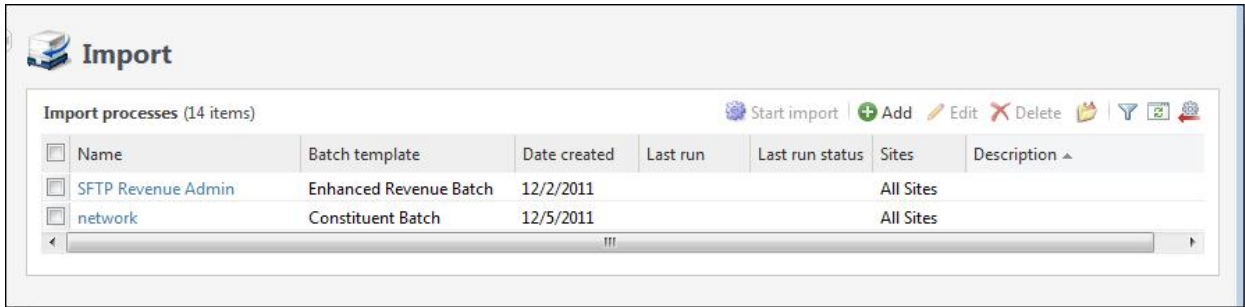
Import Page 147

Add an Import Process 156

With *Import*, you can easily move data from one program to another. *Import* is particularly useful if your organization maintains multiple databases or if you often move information in and out of the database. In *Import*, you can create a batch to enter new records into the database or update existing records. You can create an import file with an outside application, such as Microsoft *Excel*. When you select the file to import, you can map each header of the file with its corresponding fields in the batch. The fields necessary to import or update information depend on the selected batch template.

Import Page

On the Import page, you manage the import processes in your database. To access the Import page, from *Administration*, click **Import**. The Import page appears.



Note: Before you can create import processes, the system administrator must first configure the import source file locations used for import processes. For information about how to configure the import sources, see [Configure Import Sources](#) on page 147.

The **Import processes** grid displays information about the import processes in the database and the import file used for each process. This information includes the name, associated batch template, and information about the last time the process ran. Depending on your security rights and system role, you can perform various tasks to manage the import processes in the database from the action bar.

To update the information that appears in the grid, click **Reset grid** on the action bar.

Configure Import Sources

Before you can create import processes, the system administrator must configure the import source locations where import files are stored on Secured FTP servers or a shared network directory. Each source includes a URL or file path and the credentials to access the location. When you create a new import process, you select the import source file location for that process.

Warning: When the path for a network directory import source is configured incorrectly, the SFTP server import may fail. Since SFTP imports are dependent upon network setup, a failure may occur even when the SFTP server import is configured correctly.

► **Add an SFTP server import source**

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import sources**. The Import Sources page appears.
3. Click **Add, SFTP server**. The Add SFTP server import source screen appears.

The screenshot shows a window titled "Add SFTP server import source". It has a close button in the top right corner. The window is divided into two main sections. The first section, "Server information", contains four input fields: "Name:" (a text box), "URL:" (a text box), "Port:" (a text box with "22" entered), and "Site:" (a dropdown menu with "All sites" selected and a search icon). The second section, "Login credentials", contains two input fields: "User name:" (a text box) and "Password:" (a text box). Below the "Password:" field is a "Test connection" button. At the bottom of the window are three buttons: "Help" (with a question mark icon), "Save", and "Cancel".

4. In the **Name** field, enter a name to identify the import source.
5. In the **URL** field, enter the URL for the SFTP server.
6. If your SFTP server requires a port number, enter it in the **Port** field.
7. If your organization uses sites, in the **Site** field, select the site that uses this import source. If the import source is available to users associated with any site, select "All sites."
8. Under **Login credentials**, enter the username and password for the SFTP server.
9. To make sure the connection works properly, click **Test connection**.
10. Click **Save**. You return to the Import Sources page.

► **Configure a network directory import source**

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import sources**. The Import Sources page appears.
3. Click **Add, Network directory**. The Add network directory import source screen appears.

Warning: You can configure only one network directory source. Once added, you cannot delete it.

4. In the **Name** field, enter a name to identify the import source.
5. In the **Directory path** field, enter the location accessible from the web server where you store import files. For example, enter a location on the web server such as "E:\importfiles," or enter a Uniform Naming Convention (UNC) path to a shared folder such as "\\servername\importfiles."
6. Under **Login credentials**, select one of these options:
 - **Use default login** — To use the application user's network login.
 - **Use different login** — If the directory path is to a secured location, enter the username and password required for access.

Note: For security reasons, the program saves the password entered in the **Password** field in an encrypted field in the database. If you edit the import source, the password is masked.

7. Click **Save**. You return to the Import Sources page.

Configure Import File Templates

An import file mapping template specifies how to map fields from an import file to a batch template. The template allows you to map fields once rather than manually mapping them each time you create an import process.

You can create templates for delimited and fixed-width import files. For delimited files, this is a one-step process where you map fields from a sample import file to batch template fields. For fixed-width files, mapping instructions are defined by an external layout file provided by your vendor, that includes (at a minimum) a column of field names and three columns of numbers that represent the start and end positions and character widths for each field. You map the fixed-width layout file in two steps. First, you map the field name and start and end positions to their program values, and then you map the import fields to the batch template fields. As you map import file fields, the program automatically calculates start positions, end positions, and field widths based on instructions from the layout file.

After you create an import file mapping template, you can use it with any import process associated with the same batch template. You may need to create custom batch templates to accommodate your vendor's import file format. For example, if an import file includes columns for batch or file summary information, you need to include those columns in your batch template as well.

► Add a delimited import file template

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import file templates**. The Import File Templates page appears.
3. Select **Add, Delimited template**. The Add a delimited file mapping template screen appears.

Add a delimited file mapping template

Name:

Batch template: Constituent Update Batch

Site: All Sites

Sample file

File location: ☒ From server file ☐ From local file ☒ First row is header

Import file: 01_Platform_ImportDefaultValues.csv

File delimiter:

Detail record row prefix characters:

Batch template column	Import file column
Constituent	
Constituent type	Constituent type
Lookup ID	
Last/Org/Group/Household name	Last/org/group/household name
First name	First name
Addresses	Collection field...
Phones	Collection field...
Sequence	

3 of 14 batch fields have been mapped.

☐ Batch summary row prefix characters

☐ File summary row prefix characters

[Help](#)

4. In the **Name** field, enter a name to identify the file mapping template.
5. In the **Batch template** field, select the batch template to associate with this mapping template.
6. You can restrict this template to a specific site in your organization. When you select a site, only users associated with the site can access the template. To allow users of all sites to access the template, select "All sites."
7. Under **Sample file**, in the **File location** field, select the location of the import file to base the mapping template on.

- **From server file:** Select this option to choose the file from the network directory import source. In the **Import file** field, select the sample file from the drop-down.
 - **From local file:** Select this option to choose the file from your workstation. Click **Choose file** to browse to the import file.
8. If the first row of the import file is the header row, select **First row is header**.
 9. In the **File delimiter** field, select the character used to separate values in the file. You can use any delimiter except spaces and tabs.
 10. If the import file includes prefix characters to identify rows in the import file that contain detail records, select **Detail record row prefix characters** and enter the characters used, such as "DR" for "detail row." If the file uses prefixes, they always appear in the first column.
 11. The **Batch template column** of the grid lists the columns from the selected batch template. To map the columns, in the **Import file column**, select the column from the selected import file that matches the batch template column.
 12. To automatically match columns in the import file to columns in the batch template, click **Auto-map**. The program attempts to match the columns of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.
 13. If, in the **Import file column**, **Collection field** appears for a field, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.
 - a. Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.
 - b. The **Collection field column** of the grid displays the fields required for each imported entry. In the **Import file column**, select the data from the selected import file that matches the collection field. Click **OK**. You return to the Add a delimited file mapping template screen.
 14. If the import file includes rows with batch summary data, select **Batch summary row prefix characters** and enter the prefix characters used, such as "BS."
 15. If the import file includes rows with file summary information, select **File summary row prefix characters** and enter the prefix characters used, such as "FS."
 16. Click **Save**. You return to the Import File Templates page.

► **Add a fixed-width import file template**

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Configuration**, click **Configure import templates**. The Import File Templates page appears.
3. Select **Add, Fixed-width template**. The Add a fixed-width file mapping template screen appears on the Step 1: Read file columns screen.

The screenshot shows a dialog box titled "Add a fixed-width file mapping template". It has two tabs: "Step 1: Read file columns" (active) and "Step 2: Map file to batch columns".

Fields in Step 1:

- Name:** A text input field.
- Batch template:** A dropdown menu showing "Constituent Update Batch".
- Site:** A dropdown menu showing "All Sites" with a search icon.
- Layout file section:**
 - File location:** Radio buttons for "From server file" (selected), "From local file", and a checked "First row is header" checkbox.
 - Layout file:** A dropdown menu showing "FCCC ADU layout.csv".
- Layout file column mapping table:**

Layout value	Layout file column
Field name	Field Name
Start position	Start
End position	End
- Auto-map:** A button below the mapping table.

At the bottom, there is a "Help" icon, and "Previous", "Next", "Save", and "Cancel" buttons.

4. In the **Name** field, enter a name to identify the file mapping template.
5. In the **Batch template** field, select the batch template to associate with this mapping template.
6. You can restrict this template to a specific site in your organization. When you select a site, only users associated with the site can access the template. To allow users of all sites to access the template, select "All sites."
7. Under **Layout file**, in the **File location** field, select the location of the layout file to base the mapping template on. The layout file specifies the start and end position and field length for each field in the import file.
 - **From server file:** Select this option to choose a file from the network directory import source. In the **Layout file** field, select the layout file from the drop-down.
 - **From local file:** Select this option to choose a file from your workstation. Click **Choose file** to browse to the layout file.
8. If the first row of the import file is the header row, select **First row is header**.
9. In the **Layout file column mapping** grid, select the column from the layout file that maps to the **Field name**, **Start position**, or **End position** layout value in the program. You must map all three of these values.
10. To automatically match columns in the layout file to program layout values, click **Auto-map**. The program attempts to match the program layout values to similarly named columns in the selected layout file. You can adjust these as necessary.
11. Click **Next**. The Step 2: Map file to batch columns screen appears. On this screen you map batch template columns with columns in the import file.

Add a fixed-width file mapping template

Step 1: Read file columns | Step 2: Map file to batch columns

Detail record row prefix characters: Auto-map Map collection field

Batch template column	Import file column	Start position	End position	Field width
Constituent				
Constituent type				
Lookup ID				
Last/Org/Group/Household name	Last Name 1	86	125	40
First name	First Name	1,353	1,372	20
Addresses	Collection field...			
Phones	Collection field...			
Sequence				

2 of 14 batch fields have been mapped.

☐ Batch summary row prefix characters

☐ File summary row prefix characters

Help Previous Next Save Cancel

12. If the import file includes prefix characters to identify rows in the import file that contain detail records, select **Detail record row prefix characters** and enter the characters used, such as "DR" for "Detail Row." If the file uses prefixes, they always appear in the first column.
13. The **Batch template column** of the grid lists the columns from the selected batch template. In the **Import file column**, select the column from the selected import file that matches the batch template column. As you select import file columns, the **Start position**, **End position**, and **Field width** values update automatically based on specifications from the selected layout file.
To automatically match columns in the import file to fields in the batch template, click **Auto-map**. The program attempts to match the columns of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.
14. If, **Collection field** appears in the **Import file column**, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.
 - a. Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.
 - b. The **Collection field column** of the grid displays the fields required for each imported entry. In the **Import file column**, select the data from the selected import file that matches the collection field. Click **OK** to return to the Add a fixed-width file mapping template screen.
15. If the import file includes rows with batch summary data, select **Batch summary row prefix characters** and enter the prefix characters used to identify the rows, such as "BS."
16. If the import file includes rows with file summary information, select **File summary row prefix characters** and enter the prefix characters used to identify the rows, such as "FS."
17. To save the mapping template and return to the Import File Templates page, click **Save**.

Generate Import Header File

To ease the mapping of fields to their corresponding header values in an import field, you can generate a comma-separated value (*.csv) file that automatically includes the header values for a batch template. After you enter data into the rows of this header file, you can then add an import process for the file. When you click **Auto-map** on the Add import process screen, the program automatically matches the fields of the batch template to their corresponding header values in the import file.

► Generate a header file for import

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Tasks**, click **Generate import header file**. The Generate header file screen appears.

Generate header file

Batch design: Constituent Batch

Header file: C:\Files\constituentbatch.csv

Collection fields

Collection field	Quantity
Phones	1
Constituencies	1
Interests	1
Group members	1

OK Cancel

3. Select the batch template with the fields to include in the header file.
4. In the **Header file** field, browse to the location to save the header file.
5. Under **Collection fields**, the grid displays the collection fields included in the selected batch template. Collection fields can support multiple entries. In the **Quantity** column, enter the number of entries to import for each collection field. For example, to import three phone numbers for a constituent, enter 3 for the **Phones** collection field.
6. Click **OK**. At the location specified in the **Header file** field, the program automatically generates a *.csv file that contains a header row that displays the name for each field included in the batch template. A message appears to ask whether to open the header file.
7. To open the header file, click **Yes**. The file opens in a spreadsheet program such as Microsoft *Excel*. Enter import data into the file as necessary.

If you click **No**, you return to the Import page.

Generate Encryption Keys

To protect sensitive credit card information, when you use a batch template that includes a field for credit card numbers to import data, the program automatically encrypts the import file when it saves the file to the server.

To ensure the security of this sensitive data, you must periodically generate a new encryption key. We recommend your organization grant only a few users the rights to generate encryption keys.

Warning: After you generate an encryption key, you can no longer read any previously encrypted import files. Before you generate a new key, run the import process for any pending import files to avoid data loss to unreadable import files. For information about how to run the import process, see [Start an Import Process](#) on page 155.

To generate a new key from the Import page, click **Generate encryption key** under **Tasks**. When a message appears to ask whether to update the encryption key, click **Yes**. You return to the Import page. The program now uses the new encryption key to secure new import files that include credit card number information.

After you run an import process to create a batch from an encrypted import file, the program automatically deletes the encrypted import file from the server.

Start an Import Process

Once you add an import process to the database, you can run the process to import data and add the batch to the database. You can run an import process directly from the Import page. In the **Import processes** grid, select the import process to run and click **Start import**. The import process status page appears and displays the status of the process. When the import process finishes, the **Status** field on the Recent status tab displays “Completed”.

For more information about the items on the status page, see [Tabs of a Process Status Page](#) on page 141.

Note: You can also start an import process from its status page. On the import process status page, click **Start process** under **Tasks**.

When you run an import process, the program uses the selected batch template to import the information in the selected import file into a new batch. After you run the import process, the new batch appears on the Uncommitted Batches tab of the Batch Entry page.

Note: When you import constituent records that do not include lookup IDs or system IDs into a batch, the program automatically uses the name and address entered to verify the constituent does not already exist in the database. If the program finds another constituent with the same information, it links the constituent in the import file to the existing constituent record. If the program finds multiple constituents with similar information, it flags the constituent in the batch as a possible duplicate.

In *Batch Entry*, you can add or edit data entry in the batch, submit the batch for approval, and commit the batch to the database. When a batch is committed to the database, the program uses its information to add or update records in the database. To access the Batch Entry page, from *Data*, click **Batch entry**. Batches created by an import process have a description of “Batch created by the... import process”. For more information about the batch entry page, see [Batch Entry Page](#) on page 44.

Note: Depending on your security rights and system role, you can also edit the data entry of a batch created by an import process from the import process status record. On the import process status record, click **Go to batch entry** under **Tasks**. The data entry screen of the batch appears. For more information about the batch data entry screen, see [Batch Data Entry Screen](#) on page 63.

Edit an Import Process

Once you create an import process, you can update it to alter its results. For example, you can update the description or select a different import file or batch template. You can edit an import process from the Import page or the import process status page.

► Edit an import process

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Import processes**, select the process to edit.
3. On the action bar, click **Edit**. The Edit import process screen appears. The items on this screen are the same as on the Add import process screen.

Note: To edit an import process from its status page, click **Edit process** under **Tasks**.

4. Update the information as necessary.
5. Click **Save**. You return to the Import page.

Delete an Import Process

You can delete an import process. When you delete the import process, you delete only the process status record that contains which import file was used and any format options you set. You can still use the batch that contains the data imported into your database from the import file. You can delete an import process from the Import page or from its status page.

► Delete an import process

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Import processes**, select the process to delete.

Note: To delete an import process from its status page, click **Delete process** under **Tasks**.

3. On the action bar, click **Delete**. A message appears to ask whether to delete the process.
4. Click **Yes**. You return to the Import page.

Add an Import Process

You can create an import process to generate a batch to add or update information from a file created in another application. For example, you may have an event during which you do not have access to the program and instead enter data in another word processing or spreadsheet program such as Microsoft *Excel*. After you save your spreadsheet as a delimited or fixed-width file in the outside application, you can import the information into the database. You can add an import process from the Import page or from within *Batch Entry*.

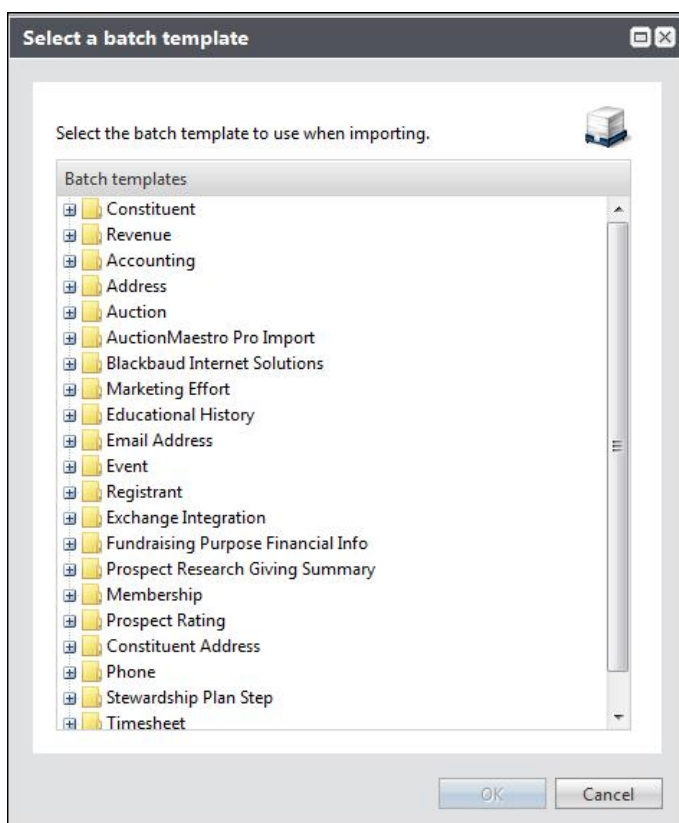
You can create recurring import processes for imports used multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location.

You must map the header fields in your import file to the matching batch template fields. You can do this manually or use file mapping templates.

Note: Before you can create import processes, the system administrator must configure at least one import source for import processes. For information about import sources, see *Configure Import Sources* on page 147.

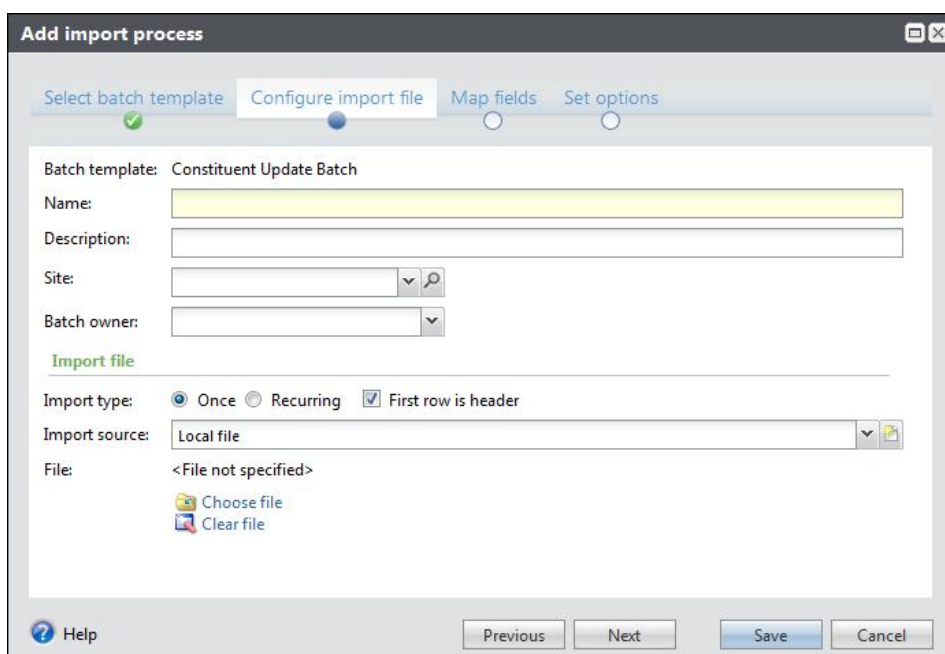
► Add an import process

1. From *Administration*, click **Import**. The Import page appears.
2. Under **Import processes**, click **Add** on the action bar. The Select a batch template screen appears.



Note: If the batch template you want does not appear, consult your batch processing manager.

3. Select the batch template to use and click **OK**. The Add import process screen appears.



4. Enter a unique name and description to help identify and explain the import process.

5. You can restrict the use of the process to a specific site in your organization. When you select a site, only users associated with the site can access the process. To allow users of all sites to access the process, select "All sites."
6. In the **Batch owner** field, select the batch processor to receive the batch created by the import process.

Warning: To ensure foreign characters appear correctly in an imported batch, the import file must be encoded as UTF-8.

7. Under **Import file**, select the import's occurrence:
 - **Once** — select this option to use the import process only once.
 - **Recurring** — select this option to use the import process multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location.
8. Select whether the first row of the import file is the header row.
9. In the **Import source** field, select an import source location where import files are stored on SFTP servers or shared network directories. For more information about import sources, see [Configure Import Sources](#) on page 147.
 - **Local file** — If you select **Once** as the import type, you can select a file from your current workstation.
 - **Network directory** — If you select **Once** as the import type, you can select the network directory import source and enter a file pattern in the **File** field.
 - **SFTP server** — If you select **Once** or **Recurring** as the import type, you can select an SFTP server import source. If the URL entered on the SFTP import source does not already include a subdirectory, you can enter one in the **Subdirectory** field.
10. If you select an SFTP server or network directory import source, you can enter a pattern for file names using wildcards (*,?,[],#) in the **File** field. This allows the import process to pull files with similar names from the same location. For example, if your organization downloads a file from an SFTP site each night and the file is always named Import plus a version number (i.e., Import123.csv), enter the file name as "Import*.csv." The import process will grab all new files in the folder that fits the pattern, such as Import4 or Import79.

Note: After an import process uses a file, the program archives it in a separate directory to ensure it does not import the file again.

11. Click **Next**. The Map fields screen appears.

Add import process

Select batch template ☒ Configure import file ☒ **Map fields** ☐ Set options ☐

Field mapping

Map fields: ☒ Manually ☐ Using file mapping template

Delimiter: ,

Batch template column	Import file column
Constituent	
Constituent type	
Lookup ID	
Last/Org/Group/Household name	
First name	
Addresses	Collection field...
Phones	Collection field...
Sequence	
Spouse relationship type	
Spouse reciprocal type	
Business relationship type	
Business reciprocal type	
Spouse lookup ID	

0 of 14 batch fields have been mapped.

Help Previous Next Save Cancel

12. Under **Field mapping**, select whether to map import fields to batch template fields manually or to use an import file mapping template. If you select **Use file mapping template**, select the mapping template. For more information about mapping templates, see [Configure Import File Templates](#) on page 149.

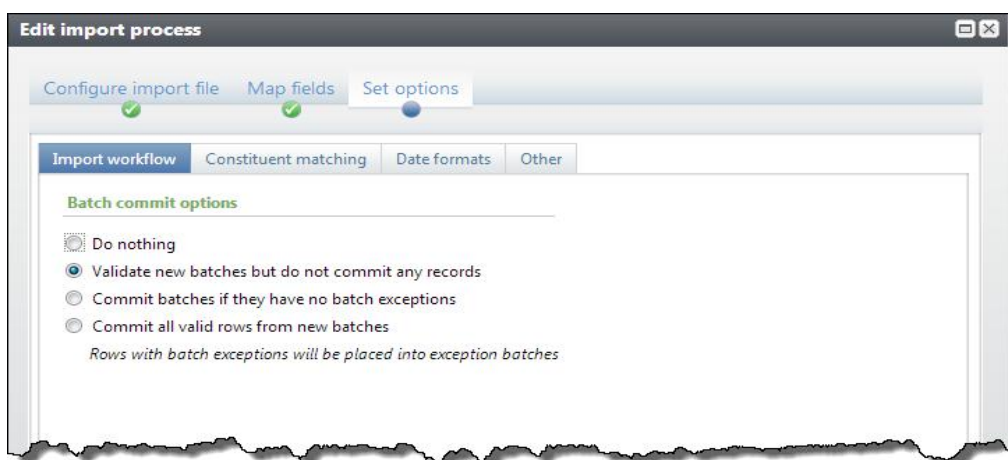
If you select **Manually**, the **Batch template column** of the grid lists the fields from the selected batch template. In the **Import file column**, select the heading from the selected import file that matches the batch template field. You can also select the character used to separate values in the file.

To automatically match fields in the import file to fields in the batch template, click **Auto map**. The program attempts to match the fields of the selected batch template to similarly named columns in the selected import file. You can adjust these as necessary.

Note: For a volunteer timesheet batch, we recommend you use Lookup ID for the **Volunteer** field.

13. If, in the **Import file column**, **Collection field** appears for a field, select the field and click **Map collection field**. The Collection field column map screen for the selected field appears.

- a. Collection fields can support multiple entries. In the **Number** field, enter the number of entries to import for the collection field. In the grid, the fields required for each entry appear.
 - b. The **Collection field column** of the grid displays the fields required for each imported entry. In the **Import file column**, select the data from the selected import file that matches the collection field.
 - c. Click **OK**. You return to the Add import process screen.
14. Click **Next**. The Set options screen appears.



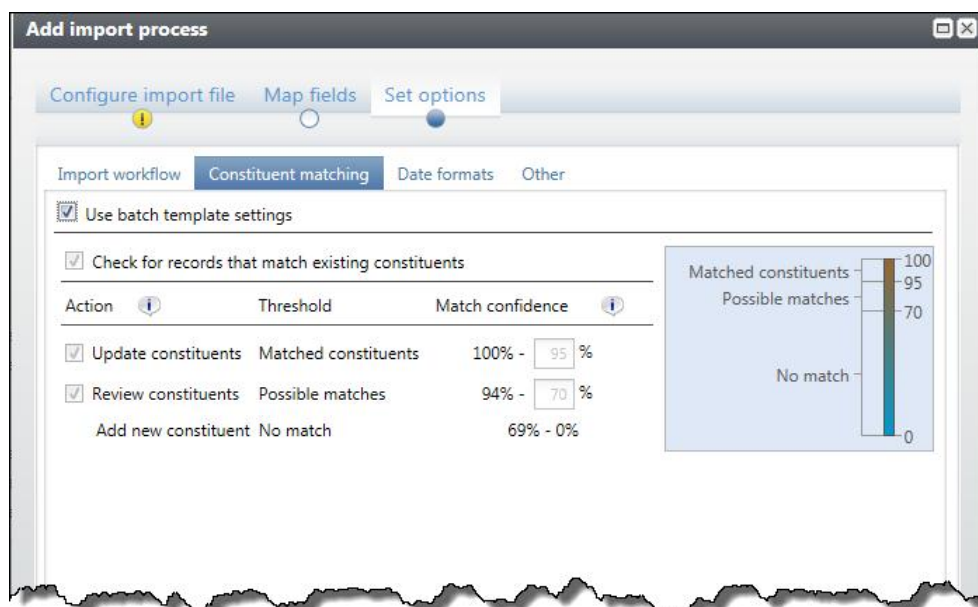
15. On the Import workflow tab, select which action to perform after batches are imported.
- **Do nothing:** Select this option to manually validate and commit the batch at a later time. Use this option when another user must review the batch before you commit it, or when you need to skip the extra validation process to ensure the batch commits on time.
 - **Validate new batches but do not commit any records:** Select this option to validate the batch and then later commit it manually. Use this option when another user must review records before you commit the batch and time allows for the extra validation process. For example, you can schedule the validation to run overnight and then manually review and commit the batch in the morning.
 - **Commit batches if they have no batch exceptions:** Select this option to validate the batch and then commit it automatically if there are no batch exceptions. Use this option when you need to enter records quickly, but you also want to manually review any errors.

Note: You may receive exceptions during committal for a batch that does not create exceptions during validation. For example, in a revenue batch, if a payment row is applied to a commitment and then another payment row is applied to the same commitment, an exception occurs because the commitment was already paid by the first row. This exception does not occur during the initial validation because validation temporarily commits a row in order to check for errors, then rolls back the committal before it processes the next row.

- **Commit all valid rows from new batches:** Select this option to validate the batch and then automatically commit each valid row. If a row does not validate, the program adds it to an exception batch that you can review later. Use this option when you need to add data as quickly as possible.
16. Select the Constituent matching tab.

Note: Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

Note: The Constituent matching tab is available only for imports that use the following batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor. The settings default from the Constituent Matching Settings page in *Administration* or from the associated batch template if that template uses different thresholds. For more information about constituent matching settings, see the *Administration Guide*.



17. You can use matching settings to identify records in the batch that may already exist as constituents in your database. When you select **Use batch template settings**, the percentages default from the batch template selected for the import. To change the default settings, clear **Use batch template settings** and select **Check for records that match existing constituents**. The thresholds defined on this tab apply to all batches produced from this import process.

- Edit the percentage range for the **Matched constituents** threshold. Imported records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import.

Note: For Constituent Update and Enhanced Revenue batches, the program may update the existing constituent with information from the incoming constituent according to your organization's selected constituent update rules. For more information about update rules, see Constituent Updates Tab. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.

- Edit the percentage range for the **Possible matches** threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent.

For more information about how to compare records on the duplicate resolution screen, see Resolve Duplicate Constituents in a Batch on page 74.

- c. The percentage range for the **No match** threshold is based on your settings for the upper thresholds. Imported records with match scores in this range probably do not match an existing record.

The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For revenue, enhanced revenue, or revenue update imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.

18. Select the Date formats tab.

Edit import process

Configure import file | Map fields | Set options

Import workflow | Constituent matching | **Date formats** | Other

Date format

M/d/yyyy

Example: **Friday, July 04, 1980** would be formatted as **7/4/1980**

Fuzzy dates

M/d/yyyy

Example: **Friday, July 04, 1980** would be formatted as **7/4/1980**

Month/day format

M/d

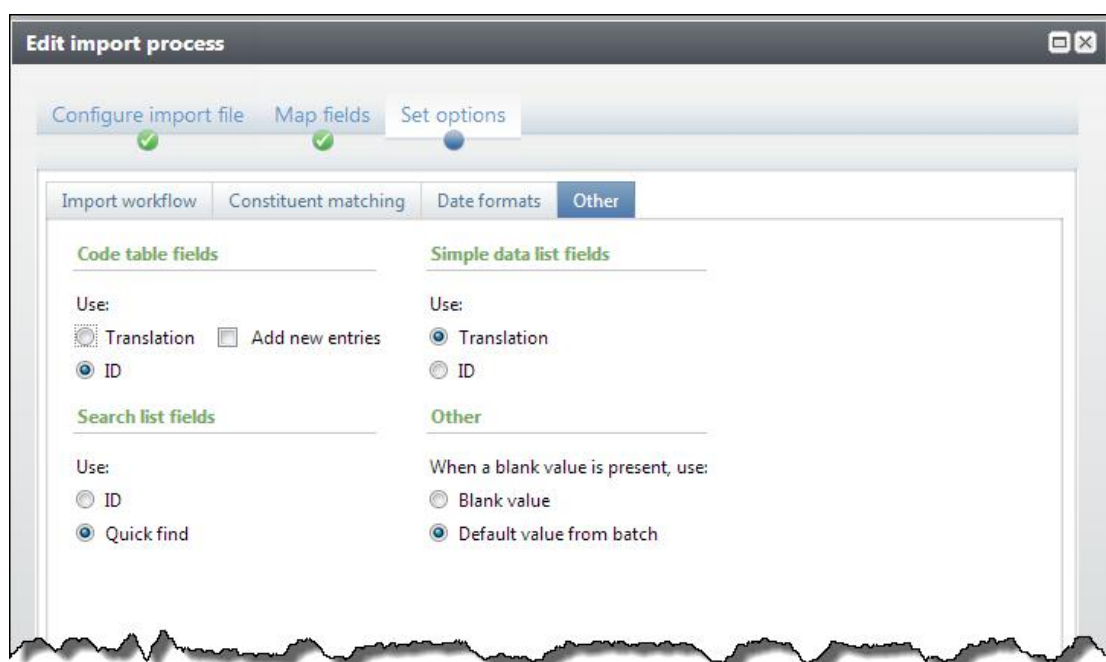
Example: **July 4** would be formatted as **7/4**

19. Under **Date format**, **Fuzzy dates**, and **Month/day format**, specify how dates appear in the imported data. Select the format from the drop-down list, or enter date specifiers to specify the format. The **Example** field displays how a date appears in the selected format.

Date Specifier	Description	Example
d	Numerical day of the month, single-digit	4
dd	Numerical day of the month, double-digit	04
ddd	Abbreviated day name	Tue
dddd	Full day name	Tuesday
M	Numerical month, single-digit	7
MM	Numerical month, double-digit	07
MMM	Abbreviated month name	Jul
MMMM	Full month name	July
yy	Year, two-digits	80
yyyy	Year, four-digits	1980

Note: A “fuzzy date” is an incomplete date. The data in the import file may include incomplete dates. For example, a fuzzy birth date of a constituent may include the month and year, but not the day.

20. Select the Other tab.



21. Under **Code table fields**, select whether the import file contains the translation or ID value of data to import from code tables. To add new entries to a code table when entries do not exist for the fields in the import file, mark **Add new entries**. If you are unsure which to select, consult your IT Administrator.
22. Under **Simple data list fields**, select whether the import file contains the translation or ID value of data to import from simple data lists. If you are unsure which to select, consult your IT Administrator.
23. Under **Search list fields**, select whether the import file contains the ID or Quick find value of data to import from search lists. If you are unsure which to select, consult your IT Administrator.

Note: For an import process based on the constituent update batch template, if you select to search list fields based on **Quick find**, the **Constituent** column within your import file must contain the constituent lookup ID.

24. Under **Other**, select how to handle a blank value in the imported data. You can select to import the blank value or use the default value from the selected batch template.

Note: **Constituent updates** is available for only Constituent Update and Enhanced Revenue batch templates.

25. Select the **Constituent updates** tab.
26. You can use constituent update rules to manage how the program resolves conflicting data on matched constituents in the batch. When you select **Use batch template settings**, the rules default from the batch template selected for the import. To change the rules used for this import process, clear **Use batch template settings** and then select other rules. The rules defined on this tab apply to all batches produced from this import process. For more information about options on the **Constituent updates** tab, see **Constituent Updates** on page 24.
27. Click **Save**. You return to the Import page or Batch Entry page.

Configure Import File

Configure import file is one of a series of forms on the Add import process screen. These forms are designed to walk you through the steps of creating an import process. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form you are currently working on. If you have not entered required information on a form, a yellow warning appears. To add an import process, click **Add** on the Import page. From here, you can access **Configure import file**.

Screen Item	Description
Name	Enter a name to help identify the import process. You can enter up to 100 characters in this field. The Name of each import process must be unique.
Description	Enter a description to identify the import process in your database. You can enter up to 255 characters in this field.
Site	Select the site that uses this process. If the process is available to users associated with any site, select "All sites."
Batch owner	Select the batch processor to receive the batch created by the import process.
Import type	Under Import file , select the import type: Once — select this option to use the import process only once. Recurring — select this option to use the import process multiple times with different import files. For example, an import process can pull files with similar names repeatedly from the same location.
First row is header	If the first row of the import file is the header row, select this checkbox.
Import source	Select an import source location where import files are stored on SFTP servers or shared network directories. For more information about import sources, see Configure Import Sources on page 147. Local file — If the import type is Once , you can select a file from your current workstation. Network directory — If the import type is Once , you can select the network directory import source and enter a file pattern in the File field. SFTP server — For one-time and recurring imports, you can select an SFTP server import source.
Subdirectory	If the URL entered on the SFTP server import source does not already include a subdirectory, you may enter one in this field.
File	If you select an SFTP server or network directory import source, in the File field, you can enter a pattern for file names using wildcards (*, ?, [], #). This allows the import process to pull files with similar names repeatedly from the same location. For example, each night your organization downloads a CSV file from an SFTP site to a folder on the network. The file is always named "Import" plus an appended version number (i.e., Import123.csv). In the File field, you can enter the file name as Import*.csv and the import process will grab any new file in the folder that fits that pattern, such as Import4 or Import79. After an import process uses a file, the program archives it in a separate directory to ensure it does not accidentally import the file again.

Map Fields

Map fields is one of a series of forms on the Add import process screen. These forms are designed to walk you through the steps of creating an import process. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears. To add an import process, select **Add** on the action bar of the Import page. From here, you can access **Map fields**.

Screen Item	Description
Mapping	Under Field mapping , select whether to map import fields to batch template fields manually or to use an import file mapping template. If you select Manually , you can also select the character used to separate values in a delimited import file. Using file mapping template , select the mapping template. For more information about mapping templates, see Configure Import File Templates on page 149
Batch template column	If you select to map fields manually, the Batch template column of the grid lists the fields from the selected batch template. You cannot edit the fields that appear in this column.
Import file column	For each field in the Batch template column , select the heading from the selected import file that matches the batch template field. To automatically match fields in the import file to the fields of the selected batch template, click Auto map . The program automatically attempts to match the fields of the selected batch template to similarly named columns in the selected import file. You can adjust the automatically mapped fields as necessary. For fields that contain more than one entry, click Map collection field and use the fields column map screen to select the corresponding data from the import file for the fields required for each entry.

Set Options

Set options is one of a series of forms on the Add import process screen. These forms are designed to walk you through the steps of creating an import process. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form on which you are currently working. If you have not entered required information on a form, a yellow warning appears. To add an import process, select **Add** on the action bar of the Import page. From here, you can access **Set options**.

Under **Set options**, you can select tabs for each of type of options to define.

Import Workflow Tab

The table below explains the items on the Import workflow tab under **Set options**. Use these options to specify which action to perform after batches are imported.

Screen Item	Description
Do nothing	Select this option to manually validate and commit the batch at a later time. Use this option when records must be reviewed by another user before the batch is committed, or when you need to skip the extra validation process to ensure the batch is committed on time.
Validate new batches but do not commit any records	Select this option to validate the batch and then later commit the batch manually. Use this option when records must be reviewed before the batch is committed and you have time for the extra validation process. For example, you could schedule the validation to run overnight and then manually review and commit the batch in the morning.
Commit batches if they have no batch exceptions	Select this option to validate the batch and then commit it automatically if there are no batch exceptions. Use this option when you need to enter records quickly but you also want to manually review if there are errors in the file. Note: You may receive exceptions during committal for a batch that does not create exceptions during validation. For example, in a revenue batch, if a payment row is applied to a commitment and then another payment row is applied to the same commitment, an exception occurs because the commitment was already paid by the first row. This exception does not occur during the initial validation because validation temporarily commits a row in order to check for errors, then rolls back the committal before it processes the next row.
Commit all valid rows from new batches:	Select this option to validate the batch and then automatically commit each valid row. If a row does not validate, the program adds it to an exception batch which you can review later. Use this option when you need to add data as quickly as possible.

Constituent Matching Tab

The table below explains the items on the Constituent matching tab under **Set options**.

Note: Options on the Constituent matching tab do not apply if the feature is not turned on via the **Enable/disable matching** configuration task in *Administration*.

Note: The Constituent matching tab is available only for imports that use these batch template types: Constituent Update, Membership Dues, Enhanced Revenue, Revenue, Revenue Update, and Sponsor.

Screen Item	Description
Use batch template settings	<p>Select this option to use the constituent matching settings defined on the batch template. If you update the matching settings on the associated batch template, the program updates the settings on the import process accordingly.</p> <p>To use custom settings for this import process, clear Use batch template settings to enable the options below.</p>
Check for records that match existing records	<p>Select this option to identify records in the import process that may already exist as constituents in your database. Thresholds defined on this screen apply to all batches produced from the import process.</p> <p>Use the threshold settings to define your ranges for match confidence scores. Match confidence compares field values from the imported record with existing records and assigns match scores for fields weighted by the field type. Match confidence is calculated based on the degree of similarity between the first names, last/organization names, middle names, suffixes, titles, addresses, and zip codes. For more information about how match confidence scores are calculated, see the <i>Administration Guide</i>.</p>
Update constituents	<p>Edit the percentage range for the Matched constituents threshold. Imported records with match scores in this range likely match records that already exist in the database. When the program finds a match, it automatically assigns the record ID from the existing record to the matched record in the import. This process occurs behind the scenes and requires no actions from users.</p> <p>Note: For Constituent Update and Enhanced Revenue batches, the program may update the existing constituent with information from the incoming constituent according to your organization's selected constituent update rules. For more information about update rules, see Constituent Updates Tab. For Constituent, Membership Dues, Revenue, Revenue Update, and Sponsor batches, the program ignores any new or conflicting data. No updates are made to the existing constituent.</p> <p>You can clear Update constituents to turn off automatic updates.</p>
Review constituents	<p>Edit the percentage range for the Possible matches threshold. Records with match scores in this range are similar enough to existing records to be possible matches, but different enough to require manual review. The program prompts you to compare the matched constituents and to choose whether to update the existing record or create a new one for the incoming constituent. For more information about how to compare records on the duplicate resolution screen, see <i>Resolve Duplicate Constituents in a Batch</i> on page 74.</p> <p>You can clear Review constituents to turn off manual reviews. For example, you may clear Review constituents on an import when you have a high volume of records and no time or resources to manually compare records before committing. In this case, it might be better to quickly add new records and then find and delete duplicates later on.</p>
Add new constituent	<p>The percentage range for the No match threshold is based on your settings for the upper thresholds. Imported records with match scores in this range probably do not match an</p>

Screen Item	Description
	existing record. The action that occurs depends on the import type. For constituent update imports, the program creates a new record. For revenue, enhanced revenue, or revenue update imports, the program creates a new record and adds the revenue to that record. These actions occur behind the scenes and require no actions from users.

Date Formats Tab

The table below explains the items on the Date formats tab under **Set options**.

Screen Item	Description
Date format	Specify how complete date values are formatted in the import file. You can select the format from the drop-down list or enter date specifiers to create a new format. The Example field displays how a date appears in the selected format.iz
Fuzzy dates	Specify how incomplete, or fuzzy, date values are formatted in the import file. You can select the format from the drop-down list or enter date specifiers to create a new format. The Example field displays how a date appears in the selected format.
Month/day format	Specify how date values that include only a month and day are formatted in the imported data. You can select the format from the drop-down list or enter date specifiers to create a new format. The Example field displays how a date appears in the selected format.

Other Tab

The table below explains the items on the Other tab under **Set options**.

Screen Item	Description
Code table fields	Select whether the import file contains the Translation or ID value of data to import from code table fields. To add new entries to a code table when entries do not exist for fields in the import file, mark Add new entries . If you are unsure which to select, consult your system administrator.
Simple data list fields	Select whether the import file contains the Translation or ID value of data to import from simple data list fields. If you are unsure which to select, consult your system administrator.
Search list fields	Select whether the import file contains the ID or Quick find value of data to import from search list fields. If you are unsure which to select, consult your system administrator. For an import process based on the constituent update batch template, if you select to search list fields based on Quick find , the Constituent column within your import file must contain the constituent lookup ID.
Other	Select how to handle a blank value in the imported data. You can select to import the blank value (Blank value) or the default value from the selected batch template (Default value from batch).

Constituent Updates Tab

The table below explains the items on the Constituent updates tab under **Set options**.

For detailed information about how the program uses constituent update rules to resolve conflicts on constituent records, see the *Administration Guide*.

Note: The Constituent updates tab is available for import processes that use Constituent Update and Enhanced Revenue batch templates.

Screen Item	Description
Use batch template settings	When you select Use batch template settings , constituent update rules default from the batch template selected for the import process. To set different constituent update rules for an import process, clear Use batch template settings and use the options below.
Name updates	<p>Under Name updates, for the If name is different from existing name setting, select one of these options:</p> <ul style="list-style-type: none"> • Update name—Select this option to replace the name on the existing constituent with the name from the incoming constituent. • Add name as an alias—Select this option to add the name from the incoming constituent as an alias to the existing constituent rather than replace an existing name. For example, if the incoming first name is "David" and the existing first name is "Dave," the program adds David an alias and leaves "Dave" as the first name. • Ignore name—Select this option to never update the name on the existing constituent. For example, if the incoming first name is "David" and the existing first name is "Dave," the program leaves the first name as "Dave." • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting names on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for names but Update existing address for addresses, the program does not automatically update the address fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the address from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming name. <p>For the Retain existing name for historical reference setting, to store the existing name on the constituent record under Historical names, select Yes. This occurs when the batch is committed. To discard the existing name, select No.</p> <p>Note: Need a visual? View the name update flowchart.</p>
Address updates	<p>Under Address updates, for the If incoming address is similar to an existing address setting, select one of these options:</p> <p>Note: "Similar" means the incoming address (Street number, Street name, and Zip code) is very close to an existing address, but there are differences in one or more of the address fields. To find similar addresses, the program compares the incoming address to each address on the existing constituent (home, business, etc.) and applies the address portion of the matching algorithm to calculate how similar the addresses are. When a pair of addresses score 86 or higher, they are considered similar. For example, if the existing street address is 1955 Main St. 29402 and the incoming is 1956 Main St. 29402, their address matching score is 92, so the program applies the rule selected for the If address is similar to an existing address setting. If the incoming address is similar to multiple existing addresses, the program applies the rule to the existing address with the highest address matching score. If no existing addresses are found that are similar to an incoming address, the program applies the rule selected for the If address is NOT similar to any existing address setting.</p>

Screen Item	Description
	<ul style="list-style-type: none"> • Update existing address (old address will not be retained) — Select this option to replace the address on the existing constituent with the address from the incoming constituent. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the address ID (generally only used in vendor files), the address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the address ID, the program applies the selected constituent update rule to the address.</p> <ul style="list-style-type: none"> • Add as new address — Select this option to add the incoming address as an additional address rather than update the existing address. • Ignore address — Select this option to never overwrite the address on the existing constituent. The program discards the incoming address. • Require manual review (generate exception) — Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the address. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for addresses but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming address. <p>For the If address is NOT similar to any existing address setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new address — Select this option to add the incoming address as a new address to the existing constituent. • Ignore address — Select this option to never add the incoming address to the existing constituent. • Require manual review (generate exception) — Select this option to always require a user to manually compare conflicting addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically add the address. <p>Under When you add an incoming address as new, you can select additional options for the new addresses. These options also apply to new addresses entered on the duplicate resolution screen.</p> <p>For the If new address had the same type as any existing address setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing address inactive — Select this option to make inactive any existing addresses with the same address type as the new address. The program updates the End date field on the constituent for all existing addresses with that address type. <p>Note: If the new and existing addresses are similar and neither has an address type assigned, the program does not make the existing address inactive. If the new address is not similar to any existing addresses and it does not have an address type assigned, any existing addresses that do not have an address type assigned remain active.</p>

Screen Item	Description
	<ul style="list-style-type: none"> • Keep the existing address active— Select this option to keep the existing address active and add the incoming address as an additional address with the same address type. <p>For the Make new address primary setting, select one of these options:</p> <p>Note: If the existing constituent has no addresses, the primary address in the batch is always primary regardless of the option selected for Make new address primary.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new address primary. If a constituent has more than one new address in the batch, the one marked primary is made primary. If none of the new addresses is marked primary, the one that appears first in the batch is made primary. • Only if the current primary address has the same address type — Select this option to make the new address primary only if it has the same address type as the existing primary address. If there are multiple new addresses in the batch and one has the same address type as the existing primary address, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and one of those new addresses is marked primary, it becomes primary. If there are multiple new addresses with the same address type as the existing primary address and none of those new addresses is marked primary, the one that appears first in the batch is made primary. • Never —Select this option to never make the new address primary. <p>Note: Need a visual? View the address update flowchart.</p>
Phone number updates	<p>Under Phone number updates, for the If incoming phone is not identical to any existing phone setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new phone — Select this option to add the incoming phone number as a new number. • Ignore phone — Select this option to never add the incoming phone number to the existing constituent. • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting phone numbers on the duplicate resolution screen even if the match confidence score is high enough to automatically update the phone number. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For example, if you select Require manual review for phone numbers but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming phone number. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the phone ID (generally only used in vendor files), the phone number is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the phone ID, the program applies the selected constituent update rule to the phone number.</p>

Screen Item	Description
	<p>Under When you add an incoming phone as new, you can select additional options for the new phone numbers. These options also apply to new phone numbers entered on the duplicate resolution screen.</p> <p>For the If new phone has the same type as any existing phone setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing phone inactive — Select this option to make inactive any existing phone numbers with the same phone type as the new phone number. The program updates the End date field on all existing phone numbers on the constituent with that phone type. • Keep existing phone active— Select this option to keep the existing phone number active and add the incoming phone number as an additional phone number with the same phone type. <p>For the Make new phone primary setting, select one of these options:</p> <p>Note: If the existing constituent has no phone numbers, the primary phone number in the batch is always primary regardless of the option selected for the Make new phone primary setting.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new phone number primary. If a constituent has more than one new phone number in the batch, the one marked primary is made primary. If none of the new phone numbers is marked primary, the number that appears first in the batch is made primary. • Only if the current primary phone has the same phone type — Select this option to make the new phone number primary only if it has the same phone type as the existing primary phone number. If there are multiple new phone numbers in the batch and one has the same phone type as the existing primary phone number, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and one of those new phone numbers is marked primary, it becomes primary. If there are multiple new phone numbers with the same phone type as the existing primary phone number and none of those new phone numbers is marked primary, the one that appears first in the batch is made primary. • Never —Select this option to never make the new phone number primary. <p>Note: Need a visual? View the phone number update flowchart.</p>
Email address updates	<p>Under Email address updates, for the If incoming email address is not identical to any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • Add as new email address — Select this option to add the incoming email address as an new email address. • Ignore email address — Select this option to never add the incoming email address to the constituent. • Require manual review (generate exception)—Select this option to always require a user to manually compare conflicting email addresses on the duplicate resolution screen even if the match confidence score is high enough to automatically update the name. Also, when you select Require manual review (generate exception) for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the duplicate resolution screen. For

Screen Item	Description
	<p>example, if you select Require manual review for email addresses but Update name for names, the program does not automatically update the name fields on the existing constituent. On the duplicate resolution screen, when you click Use my organization's rules, the program automatically moves the name from the incoming constituent column to the existing constituent column, but you must manually select whether to add, update, or ignore the incoming email address.</p> <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID as well as the email ID (generally only used in vendor files), the email address is always updated on the constituent regardless of the selected constituent update rule. If the row includes the constituent ID but not the email ID, the program applies the selected constituent update rule to the email address.</p> <p>Under When you add an incoming email address as new, you can select additional options for the new email addresses. These options also apply to new email addresses entered on the duplicate resolution screen.</p> <p>For the If new email address has the same type as any existing email address setting, select one of these options:</p> <ul style="list-style-type: none"> • Make existing email address inactive — Select this option to make inactive any existing email addresses with the same email type as the new address. The program updates the End date field on all existing email addresses on the constituent with that email type. • Keep existing email address active— Select this option to keep the existing email address active and add the incoming email as an additional email address with the same email type. <p>For the Make new email address primary setting, select one of these options:</p> <p>Note: If the existing constituent has no email addresses, the primary email address in the batch is always primary regardless of the option selected for Make new email address primary.</p> <ul style="list-style-type: none"> • Always — Select this option to always make the new email address primary. If a constituent has more than one new email address in the batch, the email marked primary is made primary. If none of the new email addresses is marked primary, the email that appears first in the batch is made primary. • Only if the current primary email address has the same email type — Select this option to make the new email address primary only if it has the same email type as the existing primary email address. If there are multiple new email addresses in the batch and one has the same email type as the existing primary email address, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and one of those new email addresses is marked primary, it becomes primary. If there are multiple new email addresses with the same email type as the existing primary email address and none of those new email addresses is marked primary, the email that appears first in the batch is made primary. • Never —Select this option to never make the new email address primary. <p>Note: Need a visual? View the email address update flowchart.</p>
Birth date updates	Under Birth date updates , for the If incoming birth date is not identical to existing

Screen Item	Description
	<p>birth date setting, select one of these options:</p> <ul style="list-style-type: none"> • Update birth date—Select this option to replace the birth date on the existing constituent with the birth date from the incoming constituent. The program updates the date automatically for all matched constituents. • Ignore birth date—Select this option to never overwrite the birth date on the existing constituent. The program discards the incoming birth date. <p>Note: For imported Constituent Update or Enhanced Revenue batches, if the constituent row includes the constituent ID, the birth date is always updated on the constituent regardless of the selected constituent update rule.</p>

Import Process Page

After you run an import process, you can view information about the process on its status page. These details help you track transactions for auditing and reconciliation purposes from the original import file, to a batch, and finally to a constituent record. This information also helps you quickly identify and resolve issues in import files that prevent data from importing.

The summary section at the top of the page includes the current scheduling, batch template and file mapping template, import file name, when the import was created, the number of times run, and the number of batches created from the process.

Each time you run an import process, the program generates a status record for the instance. On the Recent Status tab, you view the details about the most recent instance of the import process. On the History tab, you view historical status record information about each instance of the process. On the Job Schedules tab, you can view details about when the import process is scheduled to run.

Recent Status Tab

On the Recent Status tab, you view the details about the most recent instance of the import process. These details include the status of the process; status message; the person who last started the process; the start time, end time, and duration of the process; the name of the server most recently used to run the process; the total number of records processed; how many of those records processed successfully; and how many were import file exceptions. The tab also includes links to the last batch created from the process and to the exception batch if exceptions occurred.

If there are batch validation errors in the import, such as missing data, these appear in the **Exceptions** grid at the bottom.

History Tab

Each time you run an import process, the program generates a status record for the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status, process type (Import or Import + Commit), import file name, date and time started, duration, number of records processed, and server name.

When you select an instance, it expands to show additional information such as details about why an import failed. If the import is set to commit batches automatically, this section includes the number of records imported and committed, as well as links to the committed batch and exception batch if exceptions occurred. If the import is not set to commit batches automatically, this section includes a link to the uncommitted batch and displays

the scheduled commit date and time. If the process fails, you can click **Export** to export a copy of the import file to correct errors and then reimport. The **View report** link appears for batch types with associated validation or control reports. For revenue batch types, a totals section includes the projected vs. imported number of records and total revenue.

To reduce the amount of time it takes to find a process instance, you can filter the records that appear in the grid. For example, you can select to view only status records with a **Status** of Did not finish.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

► Delete a status record from the History tab

1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

Note: You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.

Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

► Create a job schedule

1. On the Job schedules tab of the process, click **Add**, or click **Create job schedule** under **Tasks**. The Create job screen appears.

Create job

Job name:

Schedule type: ☒ Enabled

One-time occurrence

Date: Time:

Frequency

Occurs every: day(s)

Daily frequency

☒ Occurs once at:

☐ Occurs every: Minutes Starting at: Ending at:

Duration

Start date: End date: ☒ No end date

2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. Your selection determines which other fields are enabled.
5. In the remaining fields, select when to run the job schedule and how long to keep it active.
6. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever <i>SQL Server Agent</i> service starts; or whenever the computer is idle according to <i>SQL Server Agent</i> .
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the Occurs every field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select Occurs once at and enter the start time. To run a process at intervals, select Occurs every and enter the time between instances, as well as a start time and end time.

Screen Item	Description
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select No end date .

Edit Job Schedules

After you create a job schedule for a process, you can update it as necessary. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

► Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see [Create Job Screen](#) on page 175.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

► Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process from the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Process Status Report

When you execute a process in *Sponsorships*, the process generates a status report which is housed on the Recent Status tab of the process page. For example, if you execute a sponsorship transfer the Transfer Report appears on the Recent Status tab. The report lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

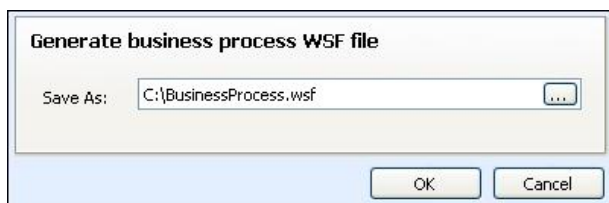
To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

► Generate a Windows Scripting File

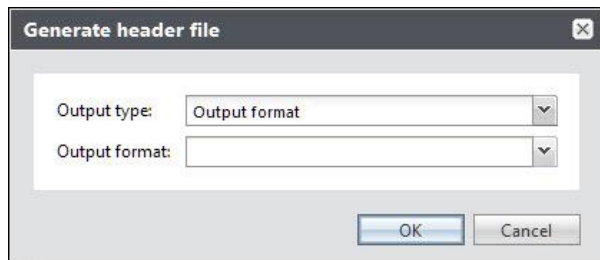
1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**. The Generate business process WSF file screen appears.



2. In the **Save As** field, enter the path and file name for the WSF file. To browse for a location to save the file, click the ellipsis. The Save As screen appears.
3. Click **OK**. The program saves the WSF file.

Generate a Header File

To personalize a communication with information specific to its topic or recipient, you can use merge fields in your Microsoft *Word* (.docx) document. To specify the merge data to include in the document, you must generate a header file that includes the merge fields. When you generate a header file, you create a comma-separated values (*.csv) file based on an output format, with fields defined by the program, or an export definition, with fields you define. In *Word*, you can use this header file to merge the data with your document. To generate a header file for a communication, click **Generate header file** under **Tasks**. The Generate header file screen appears.



In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- If you select Output format, select the output format that contains the merge fields to include.
- If you select Export definition, search for and select the export definition that includes the merge fields to include. For information about how to set up an export definition, see the *Query and Export Guide*.

When you click **OK**, the browser downloads the header file, based on the selected output format or export definition, for use in *Word*.

Go to Batch Entry

After running an import process, you can click **Go to batch entry** under **Tasks** to access the batch created by the import process.

Batch Entry Reports

Batch Control Report

Batch Exception Report

Revenue Batch Validation Report

179

180

180

Several reports are available to help you track the records entered in a batch and correct the exceptions generated when you commit a batch.

Batch Control Report

If, on the Commit parameters screen, you mark **Create control report**, you can view a control report after you commit the batch to the database. The Batch Control Report lists the records in the batch that were committed to the database and provides information about each record. The information that appears depends on the type of batch selected. For example, a control report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. By default, a revenue batch control report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.

Report Viewer

1 of 1

100%

Find | Next

Revenue Batch Control Report

Batch number:	1238	Projected #:	0	Projected total:	\$0.00
Status:	Committed	Committed #:	2	Current total:	\$250.00
Exception batch number:	1233				
Owner:	BBNT\SteveSt	Payments:	2	Total payments:	\$250.00
		Pledges:	0	Total pledges:	\$0.00
		Recurring gifts:	0	Total recurring gifts:	\$0.00

Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Appeal	Designation / Event
Mark D. Adamson	3	6/6/2007	Payment (gift)	\$150.00	Cash	ANNUALMAIL	Annual Campaign
Robert C. Hernandez	96	6/6/2007	Payment (gift)	\$100.00	Cash	ANNUALMAIL	Annual Campaign

5/31/2007 at 10:37 AMPrepared by: BBNT\SteveStPage 1 of 1

You can view the Batch Control Report from the Batch Entry page or the commit status page of the batch. From the commit status page, select **Reports, View control report** from the menu bar. From the Batch Entry page, select the batch in the Committed Batches tab and click **View control report** on the action bar. The Report Viewer screen appears and displays the Batch Control Report. To close the Report Viewer screen, click the red X in the upper right corner.

Batch Exception Report

When you commit a batch to the database, the batch commit status page appears and displays the number of records that did and did not commit to the database. Records that did not commit are called exceptions. The Batch Exception Report contains information about the records that did not commit to the database and explains why each record did not commit. The information that appears depends on the type of batch selected. For example, an exception report for a revenue batch displays the number and properties of the batch and calculates the total count and monetary amount of the payments, pledges, and recurring gifts in the batch. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.

Report Viewer


You can view the Batch Exception Report from the Batch Entry page or the commit status page of the batch. From the commit status page, select **Reports, View exception report** from the menu bar. From the Batch Entry page, select the batch in the Committed Batches tab and click **View exception report** on the action bar. The Report Viewer screen appears and displays the Batch Exception Report. To close the Report Viewer screen, click the red **X** in the upper right corner.

Revenue Batch Validation Report

For a revenue batch, the Revenue Batch Validation Report displays the number and properties of the batch; calculates the total count and monetary amount of the payments, pledges, recurring gifts, and matching gift claims in the batch; and lists the transactions entered the batch.

For revenue update batches, the Revenue Batch Validation Report compares the values of each of the fields in the batch with what is already in the database and tells you which fields are being changed in the batch, what the previous value was, and what the new value is.

For each transaction listed, the report provides the constituent associated with the transaction, the revenue type, the amount of the revenue, the date associated with the transaction, and the designations to which the revenue is applied. By default, a revenue batch validation report is sorted to reflect the order of the batch, but you can click on the column headers to change the sort. At the bottom of the report, the time and date the report was generated, the user who generated the report, and the report page number and count appear.



Revenue Batch Validation Report

1

of 1

100%

Find | Next

Revenue Batch Validation Report

Batch number:	1234	Projected #:	0	Projected total:	\$0.00
Status:	Uncommitted	Current #:	2	Current total:	\$250.00
Owner:	BBNT\SteveSt	Payments:	2	Total payments:	\$250.00
		Pledges:	0	Total pledges:	\$0.00
		Recurring gifts:	0	Total recurring gifts:	\$0.00
		MG claims:	0	Total MG claims:	\$0.00

Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Appeal	Designation
Mark D. Adamson	3	6/6/2007	Payment	\$100.00	Cash		
Robert C. Hernandez	96	6/6/2007	Payment	\$150.00	Cash		

5/31/2007 at 10:04 AM

Prepared by: BBNT\SteveSt

Page 1 of 1

You can view the Revenue Batch Validation Report for a revenue batch from the Batch Entry page or the batch data entry screen.

- On the Batch Entry page, select the batch on the Uncommitted batches tab and click **Validation report** on the action bar. The Revenue Batch Validation Report appears. To return to the Batch Entry page, click **Back** on the navigation bar.
- On the data entry screen of the revenue batch, select **File, View navigation report** on the menu bar. The Report Viewer screen appears and displays the Revenue Batch Validation Report. To close the Report Viewer screen, click the red "X" in the upper right corner.

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