

RE-LO Integration Guide

05/06/2016 The Raiser's Edge 4.5 RE-LO Integration US

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RE-LO-2015

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The Raiser's Edge and Luminate Online Integration

Luminate Online is a complete solution for website management, online giving, and email that allows your organization to build online fundraising campaigns as part of their existing websites or as a stand-alone fundraising site. When you integrate **Luminate Online** with **The Raiser's Edge**, any constituents added or edited in **The Raiser's Edge** automatically appear in **Luminate Online**. When new constituents and donations are added through **Luminate Online**, you must manually process the transaction information from the **Luminate Online** module in **The Raiser's Edge**. You can choose to accept or reject the constituent and gift updates before you download them to your database. On your constituent and gift records, you can view whether you received the information through **Luminate Online**.

The [Field Mapping Guide](#) provides a record synchronization field-to-field cross reference between Luminate Online and the Raiser's Edge.



New Features

Check out our latest features and updates.

Configure The Raiser's Edge for Integration with Luminate Online

Before you begin to share information between **Luminate Online** and your database in **The Raiser's Edge**, review the default options for information that is downloaded from **Luminate Online**, and make any changes necessary to ensure they align with your business processes. For example, from the Luminate Online Options screen, you can select a default constituent code to apply to all constituents downloaded from **Luminate Online** into **The Raiser's Edge**.

On the Luminate Online Options page, you must also establish a connection between **The Raiser's Edge** and **Luminate Online** to transfer constituent information when you merge records in **The Raiser's Edge** that are linked to constituent records in **Luminate Online**.

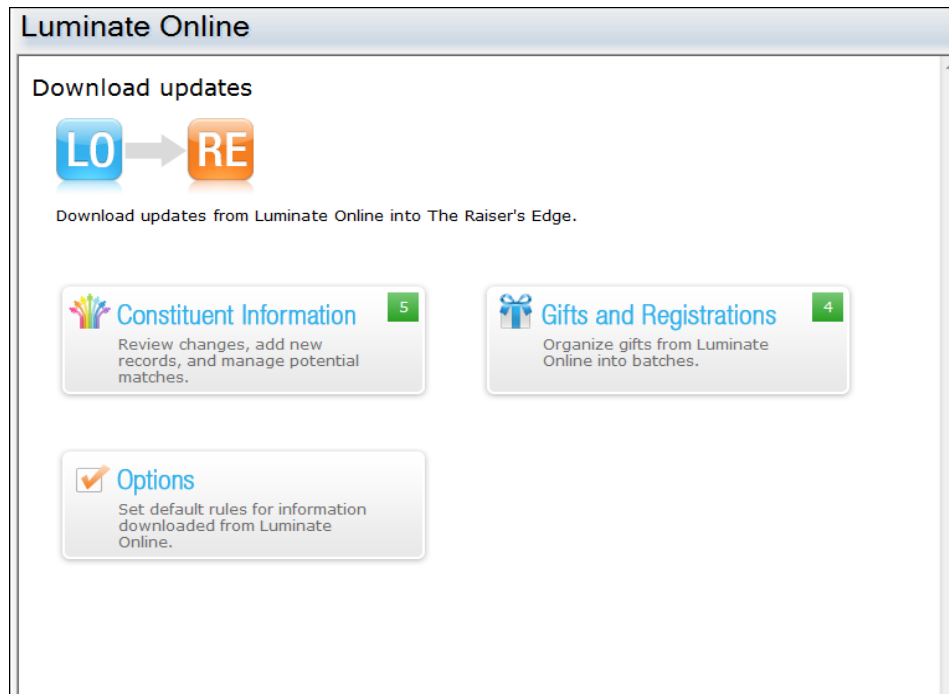
Luminate Online Options

Before you begin to share information between **Luminate Online** and your database in **The Raiser's Edge**, you can set default rules for information downloaded from **Luminate Online**. On the Luminate Online Options page, you can set default rules for constituents, such as a default constituent code to apply to the record, an address information source, set the criteria on which to attempt to match constituents from **Luminate Online** with constituents that already exist in **The Raiser's Edge**, and whether or not to automatically process constituents.

On the Luminate Online Options page, you must also establish a connection between **The Raiser's Edge** and **Luminate Online** to transfer constituent information when you merge records in **The Raiser's Edge** that are linked to constituent records in **Luminate Online**.

► **Set Luminate Online options for information downloaded from luminate online to The Raiser's Edge**

1. From **The Raiser's Edge** home page, click *Luminate Online* on the navigation bar. The Luminate Online page appears.



2. Click the **Options** button. The Luminate Online Options screen appears.

Luminate Online Options

Options

- Constituent Merge Connection
- New Constituents
- Addresses
- Constituent Matching
- Automatic Processing

Establish a connection to enable The Raiser's Edge to send constituent merge information to Luminate Online.

URL:

API key:

Username:

Password:

[Test Connection](#)

Maximum number of updates to display:

[About](#)

- Under **Options**, select **Connection Settings**.
- Enter the URL, API key, username, and password to establish a connection to enable **The Raiser's Edge** to send constituent merge information to **Luminate Online**

Warning: If you do not establish this connection, you cannot send constituent merge information to Luminate Online. For example, if you merge two constituents in **The Raiser's Edge**, and one of them is linked to a constituent in **Luminate Online**, any new information on the merged record will not transfer to **Luminate Online** if this connection is not established.

- Click **Test Connection** to verify that you entered the correct information to establish the connection between **The Raiser's Edge** and **Luminate Online** necessary to transfer constituent merge information.

If you entered the correct information, a confirmation message appears. Click **OK**. If the connection fails, verify you entered the correct information, or contact your system administrator.

- In the **Maximum number of updates to display** field, enter the maximum number of constituent or gift updates that should appear on the Luminate Online page in **The Raiser's Edge** when you download information from **Luminate Online**.
- Under **Options**, select **New Constituents**.
- Under **Constituent Code applied for all new constituents**, select the constituent code to automatically apply to each new constituent downloaded from **Luminate Online** to **The Raiser's Edge**.

Under **Default Set applied to all new individuals**, select the default set to automatically apply to each new individual constituent downloaded from **Luminate Online** to **The Raiser's Edge**.

If you do not want to apply a default set to new individuals downloaded from **Luminate Online** to **The Raiser's Edge**, select **Do not use Default Set**.

To create a new default set to apply to new individuals, click **Add New**. The New Default Set screen appears.

9. Under **Options**, select **Addresses**.

10. Under **Address info source**, select the address information source to automatically apply to each new or updated constituent downloaded from **Luminate Online** to **The Raiser's Edge**.

Note: The information source appears on the Address screen of the constituent record.

11. Under **Options**, select **Constituent Matching**.

12. Select the information fields to use as search criteria for constituent matching and auto-matching for constituents downloaded from **Luminate Online** to **The Raiser's Edge**.

Select **Exact Match** if the constituent information fields you selected must match exactly to be considered a potential match for constituents downloaded from **Luminate Online** to **The Raiser's Edge**.

Select **Include Inactive** to include constituent marked as inactive in **The Raiser's Edge** when the program checks for potential matches.

Select **Include deceased** to include constituent marked as deceased in **The Raiser's Edge** when the program checks for potential matches.

13. Under **Options**, select **Automatic processing**.

14. Select **New records from Luminate Online** to automatically process any new constituents created in **Luminate Online** directly into **The Raiser's Edge**. If you select this option there will be no manual review of new constituents. After the constituent is added in **Luminate Online**, a linked record will be created in **The Raiser's Edge**.

15. Select **Updates to Linked Luminate Online Records** to automatically process any updates to constituents in **Luminate Online** that are already linked to a constituent in **The Raiser's Edge**. If you select this option there will be no manual review of updates to constituent information. After the constituent information is updated in **Luminate Online**, the linked record in **The Raiser's Edge** will be modified with the same updated information.

Note: Any new constituents from **Luminate Online** that are matched to a constituent in **The Raiser's Edge** based on the matching criteria you have set will not be processed automatically. They will appear on the Luminate Online page in **The Raiser's Edge** for manual review, where you can either link them to the matched constituent, or process them as a new record.

16. When you choose to automatically process updates to linked constituent records, you can also choose to exclude certain constituents from automatic processing based on a query. Click **Select query** to search for a and select a query of constituents to exclude from automatic processing. Updates to any constituents that are part of the results of the selected query will appear on the Luminate Online page in **The Raiser's Edge** for manual review.

17. Click **OK** to return to the Luminate Online page.

Luminate Online Fund Limits Option

This option allows you to set a fund limit between 501 – 10,000. The default limit in the **Fund limit** field is set to “0.” This default setting points the application to the Webservices Web configuration file first. If a value is set in Webservices, it is used; if no value is set in Webservices, the application sets the default to 500.

Should you enter a value not allowed, 1 - 500 or greater than 10,000, a warning screen appears. Clicking **OK** on the warning screen reverts the limit back to the previous valid value and closes the **Luminate Online** Options screen.

Setting Luminate Online Fund Limits

1. Go to **Luminate Online** Options screen accessed from RE > Luminate Online > Options pop-up.
2. Select to **Settings**.

Upload Import Corrections through Service Bus

When errors are encountered during Raiser Edge to Luminate Online imports, Blackbaud's customer support team remedies the errors externally and then provides users the corrected external document. Once you receive the document from Blackbaud, you can import it into your system to complete the Raiser's Edge to Luminate Online import.

► Upload RE to LO import corrections from Blackbaud

1. Save the Blackbaud-provided file locally.
2. Go to **Luminate Online > Options pop-up > Tools**.
3. Click **Open**, and map to the Blackbaud file you saved locally.
4. Click **Open**.
5. The file imports and automatically corrects the Raiser's Edge files that failed to import and then moves those files into Luminate Online.

Update Blackbaud Web Services for On-Premise Clients

When you first went live with the **Luminate Online** and **The Raiser's Edge** integration, *Blackbaud Web Services* were installed for you, and turned on. This allows your database in **The Raiser's Edge** to receive information from **Luminate Online**.

When new features are available, the integration is updated automatically, but you will have to manually update *Blackbaud Web Services* to ensure your database is receiving all possible information from **Luminate Online**.

► Update Blackbaud Web Services for Luminate Online and The Raiser's Edge Integration

1. On the Raiser's Edge bar, click *Web Services*. The Web Services page appears.
2. Under **Installed Services**, click **Install Update** in the **Blackbaud Web Services** line.

Web Services

Web Service Console

Expand Raiser's Edge functionality through Web-enabled subscription services.

Installed Services

Services currently installed on this computer are listed below.

Service Name	Description	Action
Data Health Center	Various services provided to maintain the health and completeness of your Raiser's Edge database. Click here to learn more about this service...	Install Update
Mobile Service for The Raiser's Edge (tm)	Service providing access to The Raiser's Edge for mobile devices. Click here to learn more about this service...	Install Update
Charity Eligibility for The Raiser's Edge (tm)	Review the online profile from Blackbaud's Nonprofit Marketplace Website. Click here to learn more about this service...	Install Update Configuration
PhoneFinder for The Raiser's Edge (tm)	Perform an online phone search directly from a Raiser's Edge constituent record using the PhoneFinder for The Raiser's Edge service. Click here to learn more about this service...	Install Update Configuration Show Usage Statistics
WealthPoint for The Raiser's Edge (tm)	Perform an online wealth profile search directly from a Raiser's Edge constituent record using the WealthPoint for The Raiser's Edge service. Click here to learn more about this service...	Install Update Configuration Show Usage Statistics
Blackbaud Web Services	This service provides access to mobile applications, and other online connections to The Raiser's Edge. Click here to learn more about this service...	Install Update

- Click **Blackbaud Web Services**. A confirmation message appears.
- Click **Yes**.
- The web service is stopped, the update is installed, and then the web service is restarted.
- Click **OK**. The Blackbaud Web Services Configuration Options screen appears.
- Click **OK** to return to *Web Services*.

Configure Luminate Online for Integration with The Raiser's Edge

Before you share information between **Luminate Online** and your database in **The Raiser's Edge**, you must first assign cross-references for your campaigns, funds, and appeals. When you assign cross-references, you determine which campaigns in **Luminate Online** correspond to which campaigns, funds, and appeals in **The Raiser's Edge**. For example, when you receive a donation to a specific campaign through **Luminate Online**, and then download the gift to your database in **The Raiser's Edge**, the cross-reference you assigned determines the campaign and fund to which the gift will be applied in **The Raiser's Edge**.

Because **The Raiser's Edge** has multiple phone and email types, you must also specify which email and phone type to use on the constituent record in **The Raiser's Edge** when the information is downloaded from **Luminate Online**. For example, when a donation is made in **Luminate Online**, and the constituent enters a number in the **Phone** field of the donation form, you can configure that to appear as a home phone number in **The Raiser's Edge** when the constituent information is downloaded.

Assign Cross-References in Luminate Online

Before you transfer transaction information between **Luminate Online** and your database in **The Raiser's Edge**, you must first configure cross-references for your campaigns, funds, and appeals. When you create your cross-references in **Luminate Online**, the available campaigns, funds, and appeals in **The Raiser's Edge** automatically appear so you can easily select the correct designation.

► Assign Cross-References for campaigns, funds, and appeals

1. From the **Luminate Online** home page, click **Fundraising**, and select **Donation Management**. The Donation Management page appears.

Donation Management

Online Giving | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations

Campaigns

Create a New Campaign | Upload Many Campaigns

This is a list of Donation Campaigns that have been configured for your site. Use the Edit action to change information related to an overall campaign, such as the merchant account or the campaign goal. Use the Manage action to access the list of donation forms that have been configured for a campaign or to create a new form. To set up a new campaign, use the Create a New Campaign button or Copy an existing campaign.

Campaigns | All Donation Forms

All My Categories [v] Go

Records 1 - 3 of 3 | First | Previous | Next | Last

Search Show All Page 1 of 1 To Page

Name	Actions	Status	Category	Type	Summary
Basic Campaign Campaign ID: 1001	Manage Edit Copy	Active	General		Created: 01/02/2013 6:34 AM by convio Last Modified: 01/03/2013 2:18 PM by convio
Recurring Gift Campaign Campaign ID: 1002	Manage Edit Copy	Active	General		Created: 01/02/2013 6:40 AM by convio Last Modified: 01/02/2013 6:40 AM by convio

2. Select the **Campaigns** tab.
3. The **Records** grid displays each campaign in **Luminate Online**. In the **Actions** column of the campaign for which to assign a cross-reference, click **Edit**. The campaign record appears.
4. Click **Configure Cross References**. The cross-reference page appears.

Donation Management

Online Giving | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configurations

Campaigns > Basic Campaign

1. Identify Campaign
2. Choose Financial Options
3. Specify Groups and Notifications
4. Configure Cross References

Use this page to cross reference a Luminate Online object with its defined CRM counterpart. ([Tell me more](#))

The Raiser's Edge Donation Campaign

This cross reference is not required.
[Click here to configure this cross reference.](#)

* 1. The Raiser's Edge Fund

Filter:

Name	Selected Value
Designation Fund (Designation Fund)	
Designee Fund 1 (Designee Fund 1)	
Designee Fund 2 (Designee Fund 2)	
Designee Fund 3 (Designee Fund 3)	
Event (Deductable) Ticket Fund (Event (Deductable))	
Event (Non-Deductable) Ticket Fund (Event (Non-Deduct))	

5. In the **Name** grid of the **The Raiser's Edge Fund** field, select the fund in **The Raiser's Edge** to associate with your **Luminate Online** campaign. The fund name appears in the **Selected Value** grid.
6. In the **The Raiser's Edge Campaign** field, select the campaign in **The Raiser's Edge** to associate with your **Luminate Online** campaign. The campaign name appears in the **Selected Value** grid.
7. In the **The Raiser's Edge Appeal** field, select the appeal in **The Raiser's Edge** to associate with your **Luminate Online** campaign. The appeal name appears in the **Selected Value** grid.
8. In the **The Raiser's Edge Package** field, select the package in **The Raiser's Edge** to associate with your **Luminate Online** campaign. The package name appears in the **Selected Value** grid.
9. In the **The Raiser's Edge Gift Subtype** field, select the gift subtype in **The Raiser's Edge** to associate with your **Luminate Online** campaign. The gift subtype name appears in the **Selected Value** grid.
10. Click **Finish**. You return to the Donation Management page.

Note: You can also assign cross-references for your **Luminate Online** campaigns from the donation form record. To assign cross-references from a donation form record, on the Donation Management page, select the All Donation Forms tab, and click **Edit** in the **Actions** column for the donation form for which to assign a cross-reference. If a cross-reference you assigned to a campaign on the donation form record does not match the cross-reference assigned to the same campaign on the campaign record, the transaction will use the cross-reference on the donation form when the donation is downloaded to your database in **The Raiser's Edge**.

Multi-part Luminate Events

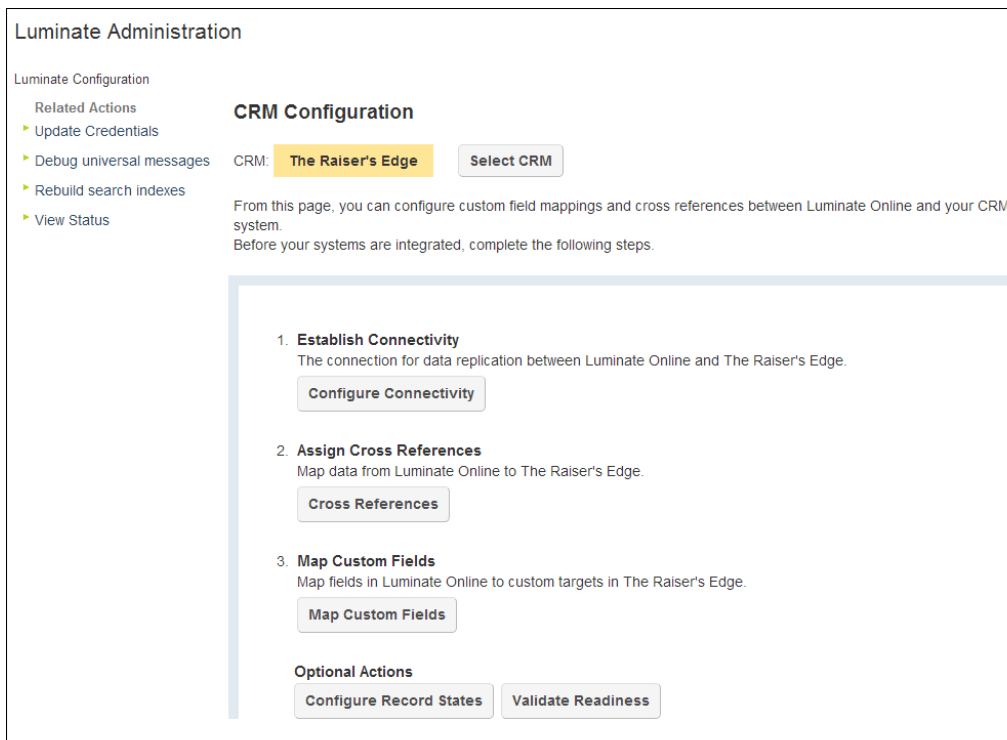
Multi-part Events are not supported and Cross-referencing is not available for Multi-part events.

Map Phone and Email Types to The Raiser's Edge

When constituents are downloaded from **Luminate Online** to **The Raiser's Edge**, phone and email information is transferred. Because **The Raiser's Edge** has multiple phone and email types, you must specify which email and phone type to use on the constituent record in **The Raiser's Edge** when the information is downloaded. For example, when a donation is made in **Luminate Online**, and the constituent enters a number in the **Phone** field of the donation form, you can configure that to appear as a home phone number in **The Raiser's Edge** when the constituent information is downloaded.

► Map Phone and Email Types

1. From the **Luminate Online** home page, click **Data Management**, and select **Luminate Configuration**. The Luminate Administration page appears.



2. Click **Map Custom Fields**. The Map Custom Fields screen appears.

Luminate Administration

Luminate Configuration > Map Custom Fields

1. Map Contact Fields

*** 1.Data Fields:**
Matches The Raiser's Edge fields with corresponding fields in Luminate Online. [More about field mapping](#)

Luminate Online Field	The Raiser's Edge Fields
Email : Email	Email
Email : Secondary Email	Secondary Email
Phone : Fax	Fax
Phone : Mobile Phone	Cell Phone
Phone : Phone	Home
Phone : Work Phone	Business

Finish or [Cancel](#)

3. Under **The Raiser's Edge Fields:**

- Select **The Raiser's Edge** email type to associate with the **Luminate Online Email** field.
- Select **The Raiser's Edge** email type to associate with the **Luminate Online Secondary Email** field.
- Select **The Raiser's Edge** phone type to associate with the **Luminate Online Fax** field.
- Select **The Raiser's Edge** phone type to associate with the **Luminate Online Mobile Phone** field.
- Select **The Raiser's Edge** phone type to associate with the **Luminate Online Phone** field.
- Select **The Raiser's Edge** phone type to associate with the **Luminate Online Work Phone** field.

4. Click **Finish** to return to the Luminate Administration page

Configure TeamRaiser Cross References

To fully transfer TeamRaiser registrations and donations from **Luminate Online** into **The Raiser's Edge**, you must configure cross references for each TeamRaiser event.

Just as you cross referenced your campaigns, funds, and appeals in **Luminate Online** to corresponding campaigns, funds, and appeals, you must match your TeamRaiser events with events in **The Raiser's Edge**.

From the TeamRaiser configuration page in **Luminate Online**, you configure event cross references.

TeamRaiser

TeamRaiser List
Cross-Event Teams
Registration Upsells
Uploads
Participant Centers

TeamRaiser List > Walk-A-Thon

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Team Divisions
6. Associate Upsells
7. Manage Participation Types
8. Manage Milestones
9. Manage Discounts
10. Manage Stationery
11. Manage Autoresponders
12. Customize Suggested Messages
13. Customize Pages
14. Customize Event URLs
15. Test Drive
16. Configure Cross References
17. Publish

Use this page to cross reference a Luminate Online object with its defined CRM counterpart. ([Tell me more](#))

The Raiser's Edge TeamRaiser Campaign

This cross reference is not required.
[Click here to hide the cross reference configuration tool.](#)

*** 1. The Raiser's Edge Fund (TeamRaiser Gift)**

Filter:

Name	Selected Value
Assets Acquisition Fund (ACQUISITION)	Building Fund (BUILDING)
Botanical Garden Fund (GARDEN)	
Building Fund (BUILDING)	
Computer Equipment (COMPUTER EQUIPMENT)	
Computer Furniture (COMPUTER FURN)	
Computer Lab Fund (LAB)	
Library Books (LIBRARY BOOKS)	
Library Fund (LIBRARY)	
Library Furniture (LIBRARY FURNITURE)	

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prev
1
2
next >
last >>

*** 2. The Raiser's Edge Fund (TeamRaiser Registration)**

When you process registrations and associated donations from **Luminate Online** into **The Raiser's Edge**, information such as team name, if the constituent is a team captain, and the URL of the page on which the constituent registered appear on the Attributes tab of the event registrant record in **The Raiser's Edge**.

Michael Blackberg (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Michael Blackberg

Registered Events
Not a group event

Walk-A-Thon

General Travel Registration Fees Participation Donations Sponsoring Pledges Attributes/Notes

Attribute category: <All Categories>

Category	Description	Short Desc.	Date	Comments
<input type="checkbox"/> TR participant page	http://bvtrelo208.bvtrelo2.co...			
<input type="checkbox"/> TR team name	Team Blackbaud			
<input type="checkbox"/> TR team captain	Yes			
<input type="checkbox"/> TR participation type	Gold sponsor			

Notes:

Sporting Event 01/08/2015

Assign Calendar Events Cross References

To fully transfer calendar event registrations and donations from **Luminate Online** into **The Raiser's Edge**, you must configure cross references for each calendar event.

Just as you cross referenced your campaigns, funds, and appeals in **Luminate Online** to corresponding campaigns, funds, and appeals, you must match your calendar events with events in **The Raiser's Edge**.

Warning: Cross referenced calendar events do not support Multi-part events.

From the event configuration page in **Luminate Online**, you configure event cross references.

Note: Only events in **The Raiser's Edge** that have not yet occurred will appear for cross referencing.

Events
Event Calendar
Event List

RELO Ticketed Event 06/23/2015 > Configure Cross References

- Identify Event
- Set Event Date
- Configure Additional Information
- Edit Ticket Information
- Customize Confirmation Message
- Configure Ticket Types
- Configure Constituent Registration Information
- Include Questions
- Customize Autoresponders
- Configure Cross References
- Publish

Use this page to cross reference a Luminate Online object with its defined CRM counterpart. ([Tell me more](#))

The Raiser's Edge Ticketed Event
This cross reference is not required.
[Click here to configure this cross reference.](#)

The Raiser's Edge Ticketed Event (Split Ticket Purchase)
This cross reference is not required.
[Click here to hide the cross reference configuration tool.](#)

*** 1. The Raiser's Edge Fund (Calendar Event Non-Deductible Ticket Price)**

Filter:

Name	Selected Value
Building Fund (BUILDING)	Library Fund (LIBRARY)
Camp Kids Scholarship (CAMP)	
Computer Equipment (COMPUTER EQUIPMENT)	
Computer Furniture (COMPUTER FURN)	
Computer Lab Fund (LAB)	
Gift Annuity Fund (GIFT ANNUITY)	
International Relief Fund (INTERNATIONAL)	
Library Books (LIBRARY BOOKS)	
Library Fund (LIBRARY)	
Library Furniture (LIBRARY FURNITURE)	

<< first < prev 2 3 4 next > last >>

*** 2. The Raiser's Edge Fund (Calendar Event Deductible Ticket Price)**

After you process registrations and associated donations from **Luminate Online** into **The Raiser's Edge**, participation types appear on the Registration Fees tab of the registration record in **The Raiser's Edge**, as well as information such as number of units purchased, gift amount, and the date of the purchase.

Jacob Cohl (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: **Jacob Cohl**

Registered Events
Not a group event

2105 Golf Fundraiser

General Travel Registration Fees Participation Donations Sponsoring Pledges Attributes/Notes

Unit	No. Units	Gift Amount	Receipt Amount	Date	Comments
Foursome	1	\$110.00	\$110.00	6/23/15	Luminate Registration Fee

☐ Apply discount

Amount Percent

Amount:

Benefits Total benefit value: \$0.00

Amount paid: \$110.00

Date paid: 6/23/15

Total gift amount: \$110.00 Total receipt amount: \$110.00

Sporting Event 6/24/15

Note: If the event registration form in **Luminate Online** contains survey questions, the question and the constituent's answers appear on the Attributes/Notes tab of the registrant record. Survey questions are truncated at 50 characters, and answers are truncated at 255 characters.

Mirror Events

To transfer calendar event information between **Luminate Online** and **The Raiser's Edge**, rather than create a new event in **Luminate Online**, you can select to mirror an existing event in **The Raiser's Edge**. Any campaigns and price types associated with the event in **The Raiser's Edge** will persist to your event in **Luminate Online** after you select to mirror it.

After you create an event in **Luminate Online** by mirroring an event in **The Raiser's Edge**, you can only manage certain aspects of the event in each program. In **The Raiser's Edge** you can adjust event start and end times, dates, and price types. In **Luminate Online**, you can edit additional information that appears on donation forms for the event, create survey questions, and configure additional cross-references to **The Raiser's Edge**, such as funds and appeals.

Note: After events are mirrored, any update to the event in **The Raiser's Edge** requires that you edit the event in **Luminate Online** to pull in the updates.

Note: If a campaign was already associated with the event when it was created in **The Raiser's Edge**, that information automatically appears on the event record in **Luminate Online**. You can change the campaign in **Luminate Online** if you wish, but that change will not transfer to **The Raiser's Edge** event record. We recommend that you keep the cross-references consistent.

► **Mirror a Luminate Online event with a Raiser's Edge event**

1. From the **Events** page in **Luminate Online**, click **Mirror a CRM Event**. The Mirror a CRM Event screen appears.
2. On the **Identify Event** step, under **CRM Event**, select **The Raiser's Edge** event to mirror. Each event in **The Raiser's Edge** that has not already occurred appears in the list.
3. Click **Finish**. The event record appears.

Download Transactions from Luminate Online to The Raiser's Edge

After you configure **Luminate Online** and **The Raiser's Edge** to share information, you can begin to download transactions from **Luminate Online** into your database in **The Raiser's Edge**. Transactions from **Luminate Online** include constituent and gift information such as new constituents and donations.

Note: Updates made in **The Raiser's Edge**, such as new constituents, automatically appear in **Luminate Online**. Only updates made in **Luminate Online** need to be transferred manually to **The Raiser's Edge**.

Download Constituent Information from Luminate Online

When new constituents are added in **Luminate Online**, such as from a first-time donation, you can download the new constituent information from the Luminate Online page in **The Raiser's Edge**.

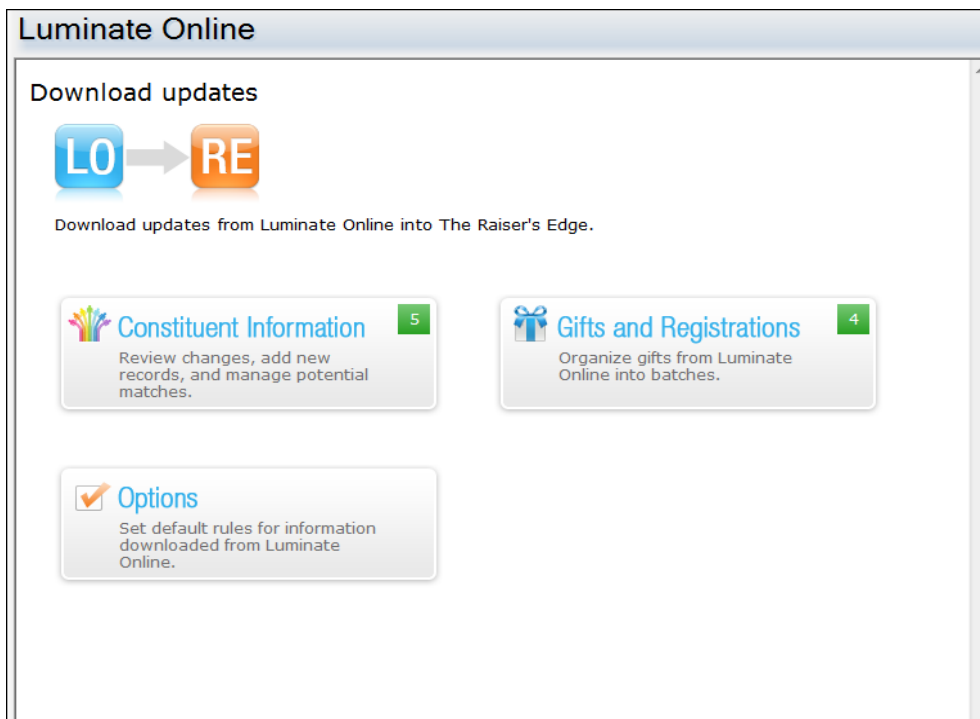
When you download constituent information from **Luminate Online** into **The Raiser's Edge**, you review all biographical and address information for each constituent before you process the updates. You can choose to accept or reject any of the information before you download it to your database in **The Raiser's Edge**.

Before you process constituent information, you can also view any possible duplicate records, and then choose to merge that information as a single record, or save them as separate records. You can also manually link the constituent information from **Luminate Online** to an existing record in **The Raiser's Edge** to avoid potential duplicates.

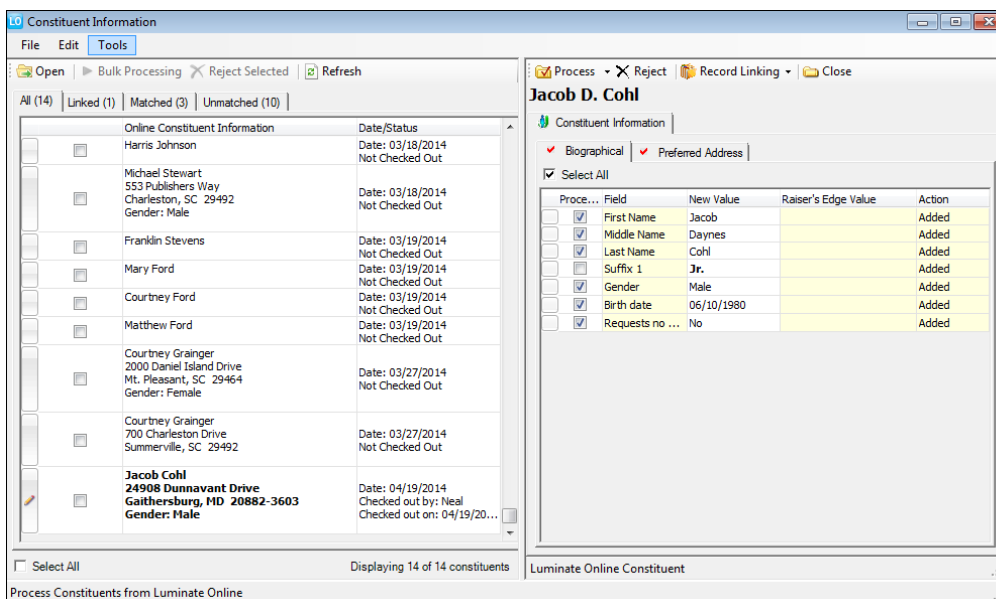
Note: If you have selected to automatically process new constituents or updates to constituent records already linked in **The Raiser's Edge**, they will not appear on the Luminate Online page for review.

► **Download constituent information from Luminate Online**

1. From **The Raiser's Edge** home page, click **Luminate Online** on the navigation bar. The Luminate Online page appears.



2. Click **Constituent Information**. The Constituent Information screen appears.



Every new or updated constituent appears on the left side of the screen.

The **All** tab contains every new or updated constituent from **Luminate Online**, the **Linked** tab displays only the constituents from **Luminate Online** that are already linked to a constituent in **The Raiser's Edge**, the **Matched** tab displays constituents from **Luminate Online** that have a potential match to a

constituent that already exists in **The Raiser's Edge**, and the Unmatched tab displays the constituents from **Luminate Online** that do not match to a constituent in **The Raiser's Edge**.

3. Select a tab, then select the constituent to download. The constituent's biographical and preferred address information appears in the **Constituent Information** tab.

Note: When you select a constituent, their information is locked so no other user can attempt to download or reject the information at the same time.

4. On the **Biographical** tab, all of the biographical information that was recorded when the constituent was added in **Luminate Online** appears. In the **Process** column, select the checkbox for each information field you want to download into **The Raiser's Edge** with the constituent.

Process [v] Reject [x] Record Linking [v] Close [v]

Jacob D. Cohl

Constituent Information

Biographical [v] Preferred Address [v]

Select All [v]

Process?	Field	New Value	Raiser's Edge Value	Action
<input checked="" type="checkbox"/>	First Name	Jacob		Added
<input checked="" type="checkbox"/>	Middle Name	Daynes		Added
<input checked="" type="checkbox"/>	Last Name	Cohl		Added
<input type="checkbox"/>	Suffix 1	Jr.		Added
<input checked="" type="checkbox"/>	Gender	Male		Added
<input checked="" type="checkbox"/>	Birth date	06/10/1980		Added
<input checked="" type="checkbox"/>	Marital status	Married		Added
<input checked="" type="checkbox"/>	Deceased	No		Added
<input checked="" type="checkbox"/>	Ethnicity	Caucasian		Added
<input type="checkbox"/>	Religion	Catholic		Added
<input checked="" type="checkbox"/>	Requests no e...	No		Added

Luminate Online Constituent

5. In the **New Value** column, click the row to edit the information if necessary, such as to correct a typo or other data entry errors.
6. Select the Preferred Address tab. All of the address information that was recorded when the constituent was added in **Luminate Online** appears in the grid.
7. In the **Process** column, select each information field you want to download into **The Raiser's Edge** with the constituent.
8. In the **New Value** column, click the row to edit the information if necessary, such as to correct a typo or other data entry errors.
9. If the information is for a constituent that already exists in **The Raiser's Edge**, you can select whether the

address information should replace what is currently listed on the constituent record as the preferred address, or to add the information as a new address for the constituent.

10. If you select to add the information as a new address, you can select **Make this new address the preferred address** to make the new information the preferred on the constituent record.
11. Select the address type for the address that was previously listed as the preferred on the constituent record.
12. After you have selected all of the information to download into *The Raiser's Edge*, click **Process** on the toolbar. A confirmation message appears.
13. Click **Yes**. You return to the Constituent Information screen.

Note: If you did not select an information field to process, the confirmation message asks if you want to reject the remaining updates. Click **Yes** to reject the updates. Click **No** to return to the Constituent Information tab to select the remaining information to process.

Note: You can also download constituent updates into *The Raiser's Edge* with bulk processing. From the Constituent Information screen, select the constituents to process on the Constituents tab, and click **Bulk Processing** on the toolbar. The Bulk Processing screen appears. Click **Process Now**. The constituent updates are downloaded to your database in *The Raiser's Edge*.

Constituent Record Linking and Merging

Before you process constituent updates from *Luminate Online* into *The Raiser's Edge*,

When you download constituent updates from *Luminate Online* into *The Raiser's Edge*, you can view matched constituents from *The Raiser's Edge*, and potential duplicates. If a constituent is auto-matched when it comes from *Luminate Online*, that means it is linked to a constituent in *The Raiser's Edge*, and the information is being shared between systems.

When you merge constituents in *The Raiser's Edge* that are linked to constituents in *Luminate Online*, the constituents are merged in *Luminate Online* as well.

Importing Email and Phone Information from LO into RE

If you enter a new constituent email address or telephone number in a linked constituent in *Luminate Online* and import the information to the existing constituent in the *Raiser's Edge*, the import process automatically promotes the new information to "Primary" if a duplicate exists in the *Raiser's Edge*. For example, if you enter a new **Home** telephone number in *Luminate Online*, import this information into a *Raiser's Edge* record already housing a **Home** telephone number, and have your business rules set to allow duplicates, the *Raiser's Edge* imports the new **Home** telephone number, designates it as "Primary," and moves the old **Home** number to the bottom of the list on the constituent's record.

Warning: Duplicate phone and email types are allowed so long as the phone numbers and/or email addresses are different. Phone and email types with the same values will not import.

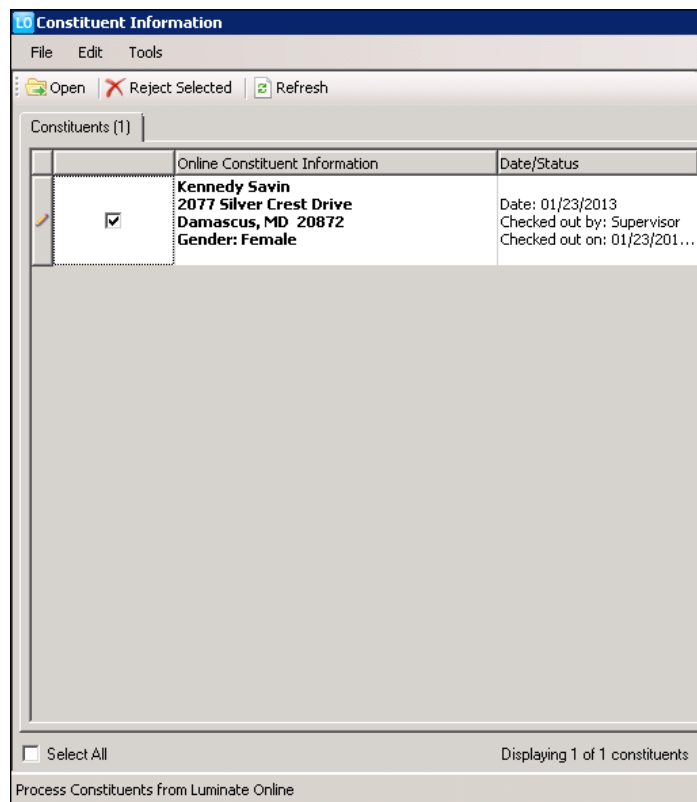
Reject Constituent Updates

If constituent information from *Luminate Online* should not be downloaded to your database in *The Raiser's Edge*, you can reject the updates.

To reject constituent updates, from the Constituent Information screen on the Luminate Online page, select the constituent to reject on the Constituent tab, and click **Reject Selected** on the toolbar. A confirmation message appears Click **Yes**. You return to the Constituent Information screen.

Note: To reject multiple constituents at once, select the checkbox for each constituent to reject.

If you reject updates for a constituent that already exists in *The Raiser's Edge*, the updates made to the constituent in *Luminate Online* will be reverted, so the information is consistent in both systems.



Note: You can also click **Reject** on the toolbar of the Constituent Information tab.

Download Donations and Gifts from Luminate Online

When new donations are accepted through *Luminate Online*, you can download the gift information from the Luminate Online page in *The Raiser's Edge*.

When you download gifts from *Luminate Online* into *The Raiser's Edge*, you can review the gift information for each donation that is to be processed, such as amount, date, and the fund to which the donation will be applied. After you process the information, it is put into a gift batch to be committed to your database.

Note: When gifts are transferred from *Luminate Online* into *The Raiser's Edge*, only the last four digits and the expiration date of credit cards are passed.

You can only accept gifts through *Luminate Online* for constituents that already exist in *The Raiser's Edge*. If you receive a donation through *Luminate Online* from a new constituent, you must first download the new constituent information into *The Raiser's Edge* before you can process the gift. For information about how to download constituent information from *Luminate Online* into *The Raiser's Edge*, see Download Constituent Information from Luminate Online on page 18.

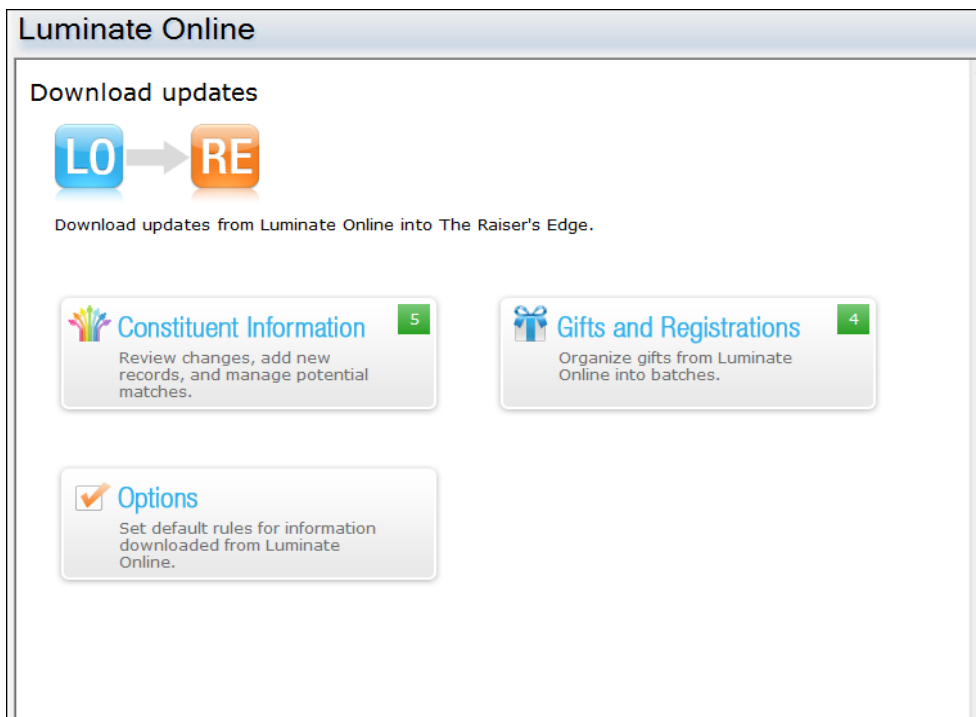
When you download a recurring gift from **Luminate Online** into **The Raiser's Edge**, you process the first payment. When each subsequent payment is due, it is automatically downloaded for you to then process.

When you download event registrations from **Luminate Online** into **The Raiser's Edge**, they are processed as cash gifts. On the Attributes tab of the gift record, the event name from **Luminate Online** appears.

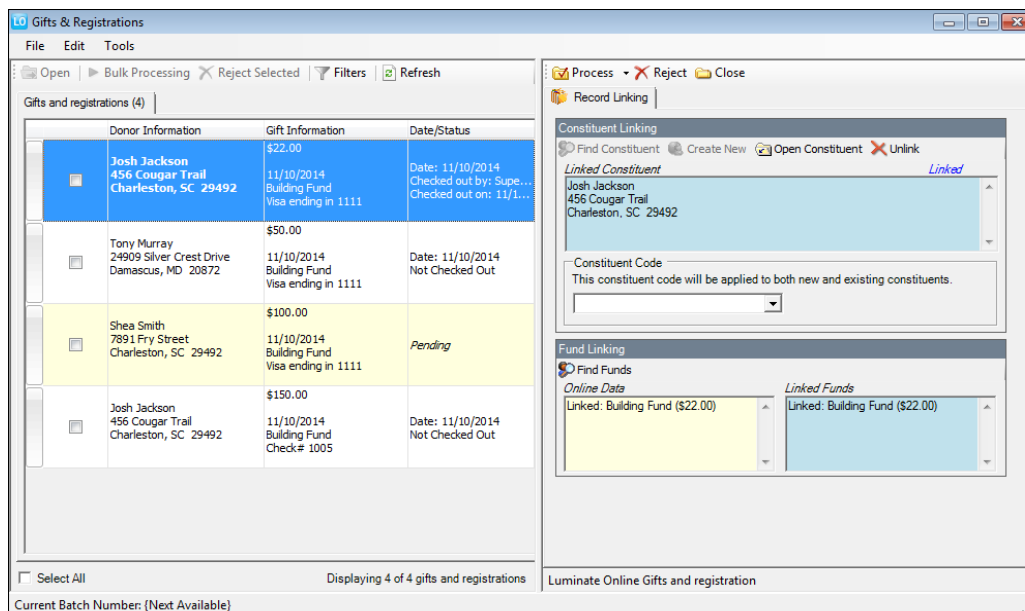
Before you begin to download gifts from **Luminate Online**, review the default batch options and make changes as necessary, such as to specify batch numbers.

► Configure gift batch options

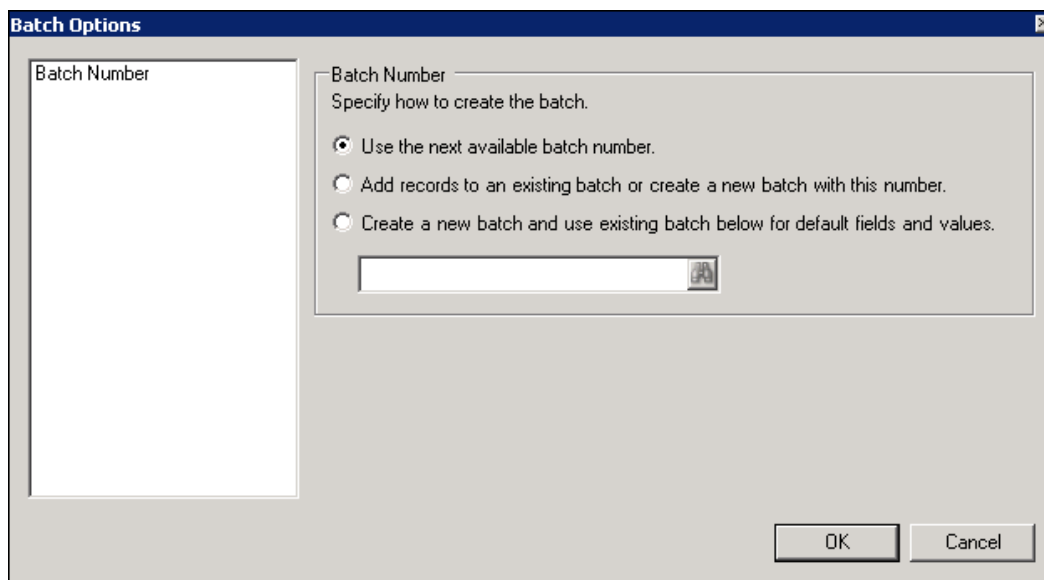
1. From **The Raiser's Edge** home page, click **Luminate Online** on the navigation bar. The Luminate Online page appears.



2. Click **Gifts and Registrations**. The Gifts and Registrations screen appears.



- Click **Tools** on *The Raiser's Edge* toolbar, and select **Batch Options**. The Batch Options screen appears.



- Under **Batch Number**, determine the batch numbering to use when you create gift batches for gifts from *Luminate Online*

To assign the batch the next available number in *The Raiser's Edge*, select **Use the next available batch number**.

To download the gifts to an existing batch in *The Raiser's Edge*, select **Add records to an existing batch or create a new batch with this number**. In the search field, click the binoculars to select the existing

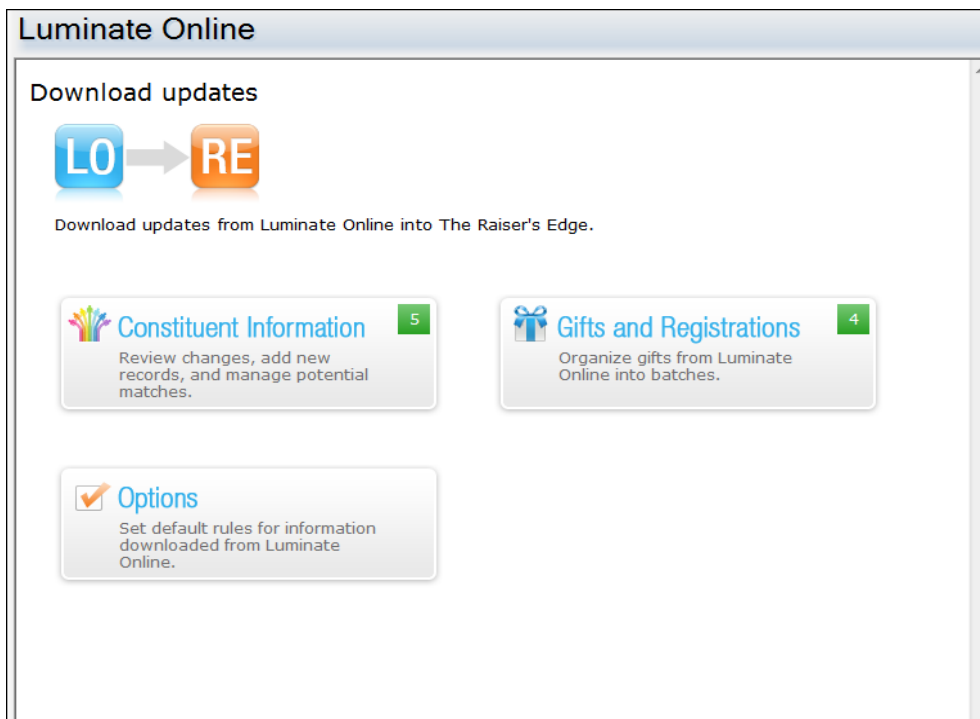
batch or create a new batch for the transactions. If the batch includes a default set, the values apply to the gifts you include in the existing batch.

To load a default set of values from an existing batch for a new batch, select **Create a new batch and use existing batch below for default fields and values**. In the search field, click the binoculars to select the batch from which to load the default set. Because you select a default set for a new batch, you can select from a previously committed batch.

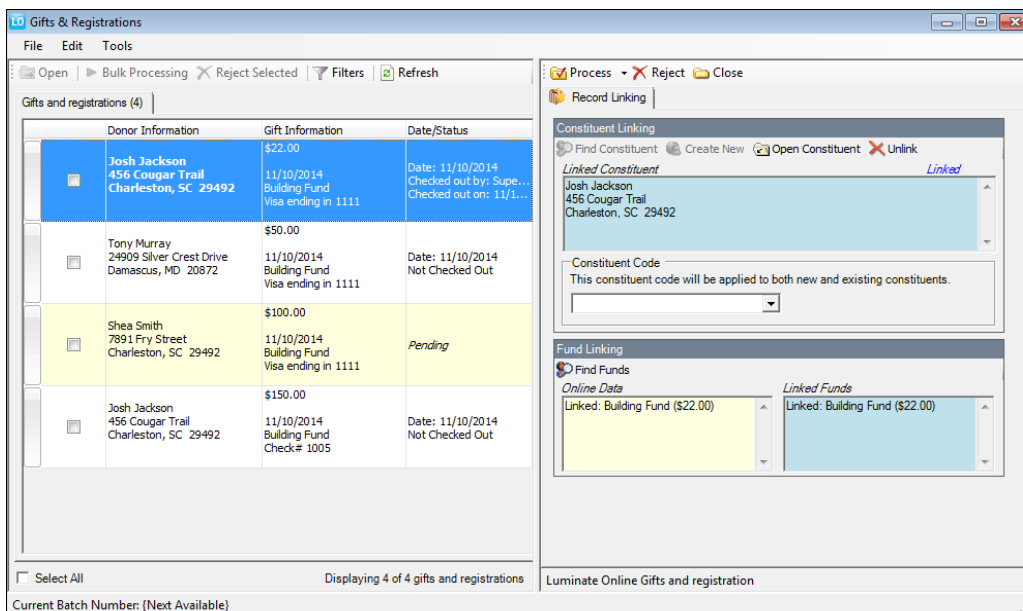
5. Click **OK** to return to the **Gifts and Registrations** screen.

► **Download donations and gifts from Luminate Online**

1. From **The Raiser's Edge** home page, click *Luminate Online* on the navigation bar. The Luminate Online page appears.



2. Click **Gifts and Registrations**. The Gifts and Registrations screen appears.



Every new donation received through **Luminate Online** appears in the Gifts and registrations tab. To help organize your donations, you can click **Filters** to open a list of options on which you can filter the list. You can filter by date range, payment type, appeal, fund, or event.

3. In the Gifts and registrations tab, select the gift to download. The gift information appears in the Record Linking tab.

Note: When you select a gift, the gift information is locked so no other user can attempt to download or reject the information at the same time.

4. In the **Constituent Linking** grid, the constituent who gave the gift appears. If the constituent is linked to one that already exists in **The Raiser's Edge**, you can click **Open Constituent** to view the constituent record.
5. Under **Constituent Code**, select the constituent code to apply to the constituent after you process the gift.
 - In the **Fund Linking** grid, the fund to which the gift is applied appears. Under **Online Data**, the **Luminate Online** fund appears, and under **Linked Funds**, the associated fund in **The Raiser's Edge** to which the gift will be applied after it is downloaded appears.
 - In the **Fund Linking** grid, the fund to which the gift is applied appears. Under **Online Data**, the **Luminate Online** fund appears, and under **Linked Funds**, the associated fund in **The Raiser's Edge** to which the gift will be applied after it is downloaded appears. If the gift should be applied to a different fund, such as to link a write-in fund from **Luminate Online** to the appropriate fund in **The Raiser's Edge**, click **Find Funds** to search for and select a different fund.
6. Click **Process** on the toolbar. A confirmation message appears

Note: If any changes were made to the constituent information, such as updated address information, when the donation was made in **Luminate Online**, a screen appears to ask whether to process those changes before the gift batch is created. When you click **Yes**, the Constituent screen appears to review

and accept the changes. To accept the changes, select the rows to update in the **Process** column, and click **Save and Close** on the toolbar. You return to the Donations and Gifts screen.

7. Click **Yes**. A gift batch is created, and a confirmation message appears.
8. Click **Yes** to view the gift batch. The Batch screen appears.

The screenshot shows a software window titled "Batch 46". It has a menu bar with "File", "Edit", "View", "Gift", "Constituent", "Favorites", "Tools", and "Help". Below the menu is a toolbar with various icons, including a "Save and Close" button. The main area is divided into two panes. The left pane contains a table with the following data:

	Constituent Name	Amount	Receipt amount	Receipt	Receipt number
*					
	Jacob Cohl	\$50.00	\$50.00	Not Receipted	

The right pane shows a detailed view of the selected constituent's information, organized into two columns: "Field" and "Value".

Field	Value
Title 1	Mr.
First Name	Jacob
Last Name	Cohl
ID	278
Address Add...	24908 Dunn...
Address City	Gaithersburgh
Address State	MD
Address ZIP	20882
Address Pho...	Email2
Address Pho...	jcohl@email...
Constituent ...	Luminate On...
Primary Add...	
Primary Salu...	

At the bottom of the window, there is a status bar with the text "Press F8 for constituent window, Press F7 for search" on the left, and "Running Total: \$50.00" and "Hidden columns exist" on the right.

9. From the Batch screen, you can edit gift information, such as amount, receipt amount, and fund.
10. Click **Commit**. The Commit Gift Batch screen appears.

Commit Gift Batch

1: General | 2: Payments

Step 1: Enter general information

☐ Validate batch before committing
☐ Create gift query of committed gifts
☐ Create a new batch of exceptions
☐ Create control report Summary Preview Print
☒ Delete batch after committing
☐ Automatically apply gifts to pledges and recurring gifts
☐ Only apply gifts to pledges and recurring gifts with the same fund(s)

Batch Statistics			
Running number of gifts:	1	Number of matching gifts:	0
Running amount:	\$80.00	Matching gift amount:	\$0.00
Created on:	01/30/2013 2:55:06 PM	Times committed:	0
Last changed on:	01/30/2013 3:58:41 PM	Last committed on:	
Created by:	Supervisor		

< Back Next > Cancel Commit Now

- On the **General** tab, make selections, such as whether or not to create an exception back and a control report.

Note: For more information about the items on this screen, see the *Batch Guide*.

- Click **Next**.
- On the Payments tab, indicate how to process payments.

Note: For more information about the items on this screen, see the *Batch Guide*.

- Click **Commit Now**. The Commit Complete screen appears.
- Click **Exception Report** to view any exceptions in the batch. If there were no exceptions, click **Close**. You return to the Gifts and Registrations screen.

Note: You can also download donations and gifts into **The Raiser's Edge** with bulk processing. From the Donations and Gifts screen, select the gifts to process on the Gifts tab, and click **Bulk Processing** on the toolbar. The Bulk Processing screen appears. Click **Process Now**. A gift batch is created that includes each gift you selected. For information about bulk processing, see the *Batch Guide*.

TeamRaiser Gifts and Registrations

When you cross reference your TeamRaiser events in **Luminate Online** with your events in **The Raiser's Edge**, TeamRaiser registrations and associated donations flow into the **The Raiser's Edge** to be processed into your database. You configure these cross references on the Team Raiser configuration page in **Luminate Online**.

TeamRaiser

TeamRaiser List

Cross-Event Teams

Registration Upsells

Uploads

Participant Centers

TeamRaiser List > Walk-A-Thon

1. Identify TeamRaiser
2. Select Fundraising Options
3. Select Event Options
4. Select Team Options
5. Team Divisions
6. Associate Upsells
7. Manage Participation Types
8. Manage Milestones
9. Manage Discounts
10. Manage Stationery
11. Manage Autoresponders
12. Customize Suggested Messages
13. Customize Pages
14. Customize Event URLs
15. Test Drive
16. Configure Cross References
17. Publish

Use this page to cross reference a Luminate Online object with its defined CRM counterpart. ([Tell me more](#))

The Raiser's Edge TeamRaiser Campaign

This cross reference is not required.
[Click here to hide the cross reference configuration tool.](#)

*** 1. The Raiser's Edge Fund (TeamRaiser Gift)**

Filter:

Name	Selected Value
Assets Acquisition Fund (ACQUISITION)	Building Fund (BUILDING)
Botanical Garden Fund (GARDEN)	
Building Fund (BUILDING)	
Computer Equipment (COMPUTER EQUIPMENT)	
Computer Furniture (COMPUTER FURN)	
Computer Lab Fund (LAB)	
Library Books (LIBRARY BOOKS)	
Library Fund (LIBRARY)	
Library Furniture (LIBRARY FURNITURE)	

<< first < prev 1 2 next > last >>

*** 2. The Raiser's Edge Fund (TeamRaiser Registration)**

After you process TeamRaiser registrations and commit the batches that contain the associated gifts, that information appears on the constituent record, as well as on the event and registrant records.

On the registrant record in **The Raiser's Edge**, participation types appear on the Attributes tab, as well as information such as team name, if the constituent is a team captain, and the URL of the page on which the constituent registered.

Michael Blackberg (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Michael Blackberg

Registered Events
Not a group event

Walk-A-Thon

General | Travel | Registration Fees | Participation | Donations | Sponsoring Pledges | Attributes/Notes

Attribute category: <All Categories>

Category	Description	Short Desc.	Date	Comments
<input type="checkbox"/> TR participant page	http://bvtrelo208.bvtrelo2.co...			
<input type="checkbox"/> TR team name	Team Blackbaud			
<input type="checkbox"/> TR team captain	Yes			
<input type="checkbox"/> TR participation type	Gold sponsor			

Notes:

Sporting Event 01/08/2015

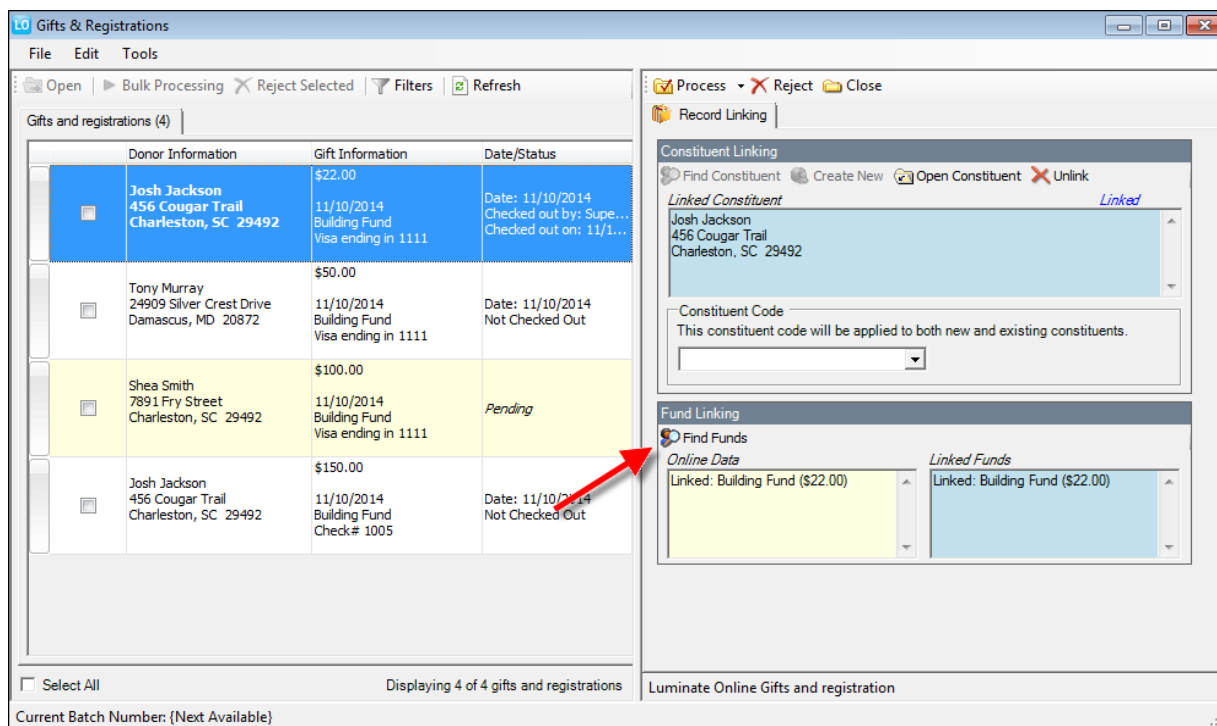
Write-In Fund Donations

When a constituent makes a donation through **Luminate Online**, they designate the fund to which their donation should be applied. Rather than select the fund from a specified list of funds on the donation form, some donations forms allow for write-in funds. Write-in funds allow donors to express a custom or special request designation other than what is offered on the donation form.

In order for a donation to process successfully in **Luminate Online**, the fund selected on the donation form must be cross-referenced to a fund in **The Raiser's Edge**. Since write-in funds do not apply directly to a specific fund, we recommend you create a "placeholder" fund in **The Raiser's Edge** to serve as the cross-reference for all write-in fund donations. When you access the Luminate Online page to download and process the donations into **The Raiser's Edge**, you must manually link the donation to the appropriate fund in **The Raiser's Edge**. To maintain donor intent, use the write-in information to determine the fund to which the donation should be applied. You cannot create the gift batch to commit the donations until all write-in funds are linked to the appropriate fund in **The Raiser's Edge**.

Note: For information about how to assign cross-references in **Luminate Online** to funds in **The Raiser's Edge**, see Assign Cross-References for campaigns, funds, and appeals on page 10. For information about how to create funds in **The Raiser's Edge**, see the *Campaigns, Funds, and Appeals Data Entry Guide*.

To link a write-in fund from **Luminate Online** to the appropriate fund in **The Raiser's Edge**, click **Find Funds** in the **Fund Linking** grid on the Donations and Gifts screen.



After you process and commit a write-in fund donation to **The Raiser's Edge**, the write-in information is stored on the **Reference** field of the gift record.

For information about how to download donations and gifts from **Luminate Online** to **The Raiser's Edge**, see Download donations and gifts from Luminate Online on page 25 .

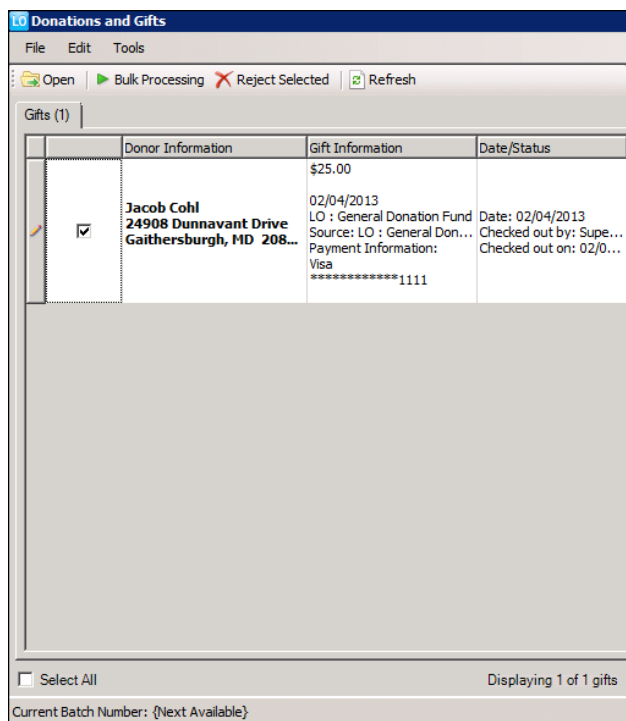
When you download donations from **Luminate Online** to **The Raiser's Edge** that use write-in funds, you must use the write-in information to link the donation to the appropriate fund in **The Raiser's Edge**.

Reject Donations and Gifts

If a gift from **Luminate Online** should not be downloaded to your database in **The Raiser's Edge**, you can reject the information.

To reject gifts, from the Donations and Gifts screen on the Luminate Online page, select the gift to reject on the Gifts tab, and click **Reject Selected** on the toolbar. A confirmation message appears Click **Yes**. You return to the Donations and Gifts screen.

Note: To reject multiple gifts at once, select the checkbox for each gift to reject.



When you reject a gift, the gift information still exists in **Luminate Online**.

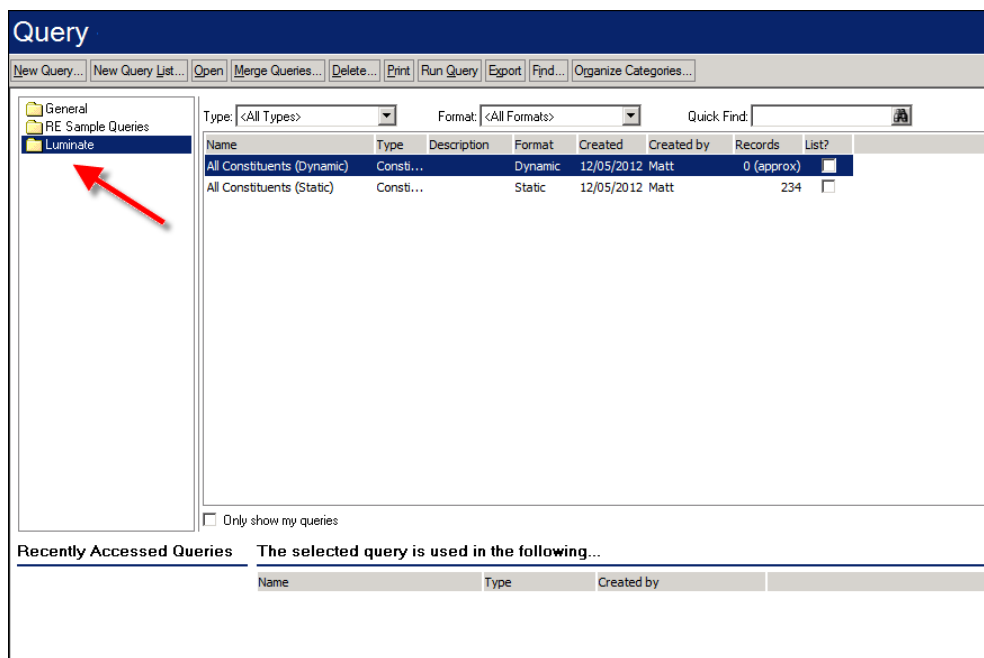
Note: You can also click **Reject** on the toolbar of the Record Linking tab.

Groups and Queries

When you integrate **Luminate Online** and **The Raiser's Edge**, you can automatically transfer your queries in **The Raiser's Edge** to **Luminate Online**, such as to use for email advocacy programs. Queries in **The Raiser's Edge** transfer to **Luminate Online** as Groups.

Note: Groups in **Luminate Online** do not transfer to **The Raiser's Edge**.

For queries in **The Raiser's Edge** to appear as groups in **Luminate Online**, you must create a query category in **The Raiser's Edge** called, "Luminate." After you create the Luminate category, you must place each query you want to appear in **Luminate Online** in that category. The group is then created in **Luminate Online**. For information about query categories, see the *Query Guide*.



When the query is updated in *The Raiser's Edge*, such as when you refresh a static query, you must manually refresh the group in *Luminate Online* to transfer the changes. To refresh the group in *Luminate Online*, click **Constituent 360**, and select **Groups**. Select the group to refresh, and on the Members tab, click **Refresh**.

Only constituents in the results of your query that have a record in both *The Raiser's Edge* and *Luminate Online* will appear in the group in *Luminate Online*.

Map a New Group to an Offline Segment

From *Luminate Online*, you can create new groups that pull information from your database in *The Raiser's Edge*. When you map a group to your database in *The Raiser's Edge*, it ensures that you are getting the most accurate results for constituents who match your criteria.

Mapped groups query *The Raiser's Edge* when the group is rebuilt.

► Map a group to an offline segment

1. From the *Luminate Online* home page, click **Constituent 360**, and select **Groups**. The Groups page appears.
2. From the Groups page, click **Map a new group to an off-line segment**. The Group Information page appears.

3. Enter information in the required fields, and in the **Map to Offline Logical Segment** dropdown, select your query in *The Raiser's Edge*.
4. Click **Save**.

Field Mapping Between Luminate Online and The Raiser's Edge

This section outlines the location that information is transferred when you download constituents and gifts from **Luminate Online** to your database in **The Raiser's Edge**. When you transfer data between the two programs, you can use these tables as a reference.

Constituent Field Mapping

In both **Luminate Online** and **The Raiser's Edge**, you track information about your organization's constituents, such as name, address, and other contact information. When you transfer data between the two programs, you transfer information from your **Luminate Online** constituent records to constituent records in **The Raiser's Edge**. **The Raiser's Edge** can also create new constituent records for new donors in **Luminate Online**. For information about how to download constituent updates from **Luminate Online**, see Download constituent information from Luminate Online on page 18.

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Title	Constituent profile, Biographical Information	Title 1	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Salutation (Casual)	Constituent profile, Biographical Information	Primary Salutation	Constituent record, Addressees/Salutations tab	
Salutation (Formal)	Constituent profile, Biographical Information	Primary Addressee	Constituent record, Addressees/Salutations tab	
First Name	Constituent profile, Biographical Information	First Name	Constituent record, Bio 1 tab	
Middle Name	Constituent profile, Biographical Information	Middle Name	Constituent record, Bio 1 tab	
Last Name	Constituent profile, Biographical Information	Last Name	Constituent record, Bio 1 tab	
Nickname	Constituent profile, Biographical Information	Nickname	Constituent record, Bio 1 tab	
Maiden Name	Constituent profile, Biographical Information	Maiden Name	Constituent record, Bio 1 tab	
Suffix	Constituent profile, Biographical Information	Suffix 1	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Professional Suffix	Constituent profile, Biographical Information	Suffix 2	Constituent record, Bio 1 tab	
Date of Birth	Constituent profile, Biographical Information	Birth Date	Constituent record, Bio 1 tab	
Gender	Constituent profile, Biographical Information	Gender	Constituent record, Bio 1 tab	
Marital Status	Constituent profile, Biographical Information	Marital status	Constituent record, Bio 1 tab	
Deceased	Constituent profile, Biographical Information	Deceased checkbox	Constituent record, Bio 1 tab	
Ethnicity	Constituent profile, Biographical Information	Ethnicity	Constituent record, Bio 2 tab	
Religion	Constituent profile, Biographical Information	Religion	Constituent record, Bio 2 tab	
Email	Constituent profile, Email	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Email Status	Constituent profile,	N/A	N/A	The Email Status field does not map to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Email			
Email Opt-Out Date	Constituent profile, Email	N/A	N/A	The Email Opt-Out Date field does not map to <i>The Raiser's Edge</i> .
Accept Email	Constituent profile, Email	Requests no email checkbox	Constituent record, Bio 1 tab	
Work Phone	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Mobile Phone	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Phone	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Fax	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Accept Mail	Constituent profile, Address	Send Mail? checkbox	Constituent record, Addresses tab	
Occupation	Constituent profile, Employment	Profession	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Position	Constituent profile, Employment	Position	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer	Constituent profile,	Org Name	Constituent record, Bio 1 tab, Organization	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Employment		Relationship screen, General 1 tab	
Employer Address Street 1	Constituent profile, Employment	Address Lines field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Street 2	Constituent profile, Employment	Address Lines	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Street 3	Constituent profile, Employment	Address Lines	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address City	Constituent profile, Employment	City	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address State/ Province	Constituent profile, Employment	[[[Undefined variable BB_Variables.State_UC]]]	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address ZIP/ Postal Code	Constituent profile, Employment	ZIP	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Country	Constituent profile, Employment	Country	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Member ID	Constituent profile, Biographical	System Record ID	Constituent record, Constituent Properties screen	On the constituent record, click File on The Raiser's Edge toolbar, and select Properties .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Information			
Constituent ID	Constituent profile, Biographical Information	Alias	Constituent record, Bio 1 tab, Aliases screen	On the Bio 1 tab of the constituent record, click the Aliases button.
User Name	Constituent profile, Biographical Information	Alias	Constituent record, Bio 1 tab, Aliases screen	On the Bio 1 tab of the constituent record, click the Aliases button.
Exchange ID	Constituent profile, Biographical Information	Import ID	Constituent record, Constituent Properties screen	On the constituent record, click File on <i>The Raiser's Edge</i> toolbar, and select Properties
Street 1	Constituent profile, Address	Address Lines	Constituent record, Bio 1 tab	
Street 2	Constituent profile, Address	Address Lines	Constituent record, Bio 1 tab	
Street 3	Constituent profile, Address	Address Lines	Constituent record, Bio 1 tab	
City	Constituent profile, Address	City	Constituent record, Bio 1 tab	
State/ Province	Constituent profile, Address	[[[Undefined variable BB_Variables.State_UC]]]	Constituent record, Bio 1 tab	
ZIP/Postal Code	Constituent profile, Address	ZIP	Constituent record, Bio 1 tab	
Country	Constituent	Country	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	profile, Address			
County	Constituent profile, Address	County	Constituent record, Addresses tab, Edit preferred address screen	From the Addresses tab of a constituent record, select an address in the grid and click Open , or add a new address.
County ID (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The County ID (Manual Override) field does not map to <i>The Raiser's Edge</i> .
County District (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The County District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
Municipality (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The Municipality (Manual Override) field does not map to <i>The Raiser's Edge</i> .
Congressional District (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The Congressional District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
State Senate District (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The State Senate District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
State House District (Manual Override)	Constituent profile, Advocacy Information	N/A	N/A	The State House District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
County District (Automatic)	Constituent profile, Advocacy	N/A	N/A	The County District (Automatic) field does not map to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Information			
Municipality (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The Municipality (Automatic) field does not map to <i>The Raiser's Edge</i> .
Municipality ID (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The Municipality ID (Automatic) field does not map to <i>The Raiser's Edge</i> .
Municipal District (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The Municipal District (Automatic) field does not map to <i>The Raiser's Edge</i> .
State House District (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The State House District (Automatic) field does not map to <i>The Raiser's Edge</i> .
State Senate District (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The State Senate District (Automatic) field does not map to <i>The Raiser's Edge</i> .
Congressional District (Automatic)	Constituent profile, Advocacy Information	N/A	N/A	The Congressional District (Automatic) field does not map to <i>The Raiser's Edge</i> .
Significant other First Name	Constituent profile, Significant Other	First Name	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Middle Name	Constituent profile, Significant	Middle Name	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Other			constituent record, Bio 1 tab.
Significant Other Last Name	Constituent profile, Significant Other	Last Name	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Title	Constituent profile, Significant Other	Title 1	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Suffix	Constituent profile, Significant Other	Suffix 1	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Gender	Constituent profile, Significant Other	Gender	Constituent record, Bio 1 tab, Individual Relationship screen, General 2 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
External First Gift Amount	Constituent profile, Transaction Information	Amount column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External First Gift Date	Constituent profile, Transaction Information	Date column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
				in-Kind, Recurring Gift Pay-Cash.
External Last Gift Date	Constituent profile, Transaction Information	Date column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External Last Gift Amount	Constituent profile, Transaction Information	Amount column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External Largest Gift Date	Constituent profile, Transaction Information	Date column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External Largest Gift Amount	Constituent profile, Transaction Information	Amount column	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
External YTD Gift Count	Constituent profile, Transaction Information	N/A	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External YTD Gift Amount	Constituent profile, Transaction Information	N/A	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External Lifetime Gift Count	Constituent profile, Transaction Information	N/A	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
External Lifetime Gift Amount	Constituent profile, Transaction Information	N/A	Constituent record, Gifts tab	The gift types used to calculate external gift summary information are: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.
Sustained giving Status	Constituent profile, Sustained Giv-	N/A	N/A	The sustained giving Status field does not map to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	ing Inform- ation			
Sustained giving Status	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Status field does not map to <i>The Raiser's Edge</i> .
Sustained giving Start Date	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Start Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Actual End Date	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Actual End Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Monthly Amount	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Monthly Amount field does not map to <i>The Raiser's Edge</i> .
Sustained giving Planned End Date	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Planned End Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Card E[[[Undefined variable BB_Variables.expiration]]] Date	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Card E[[[Undefined variable BB_Variables.expiration]]] Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Last Payment Attempt	Constituent	N/A	N/A	The sustained giving Last Payment

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Failure Code	profile, Sustained Giving Information			Attempt Failure Code field does not map to <i>The Raiser's Edge</i> .
Membership Status	Constituent profile, Membership Information	N/A	N/A	The Membership Status field does not map to <i>The Raiser's Edge</i> .
Membership ID	Constituent profile, Membership Information	N/A	N/A	The Membership ID field does not map to <i>The Raiser's Edge</i> .
E[[[Undefined variable BB_Variables.expiration]]]	Constituent profile, Membership Information	N/A	N/A	The E[[[Undefined variable BB_Variables.expiration]]] field does not map to <i>The Raiser's Edge</i> .
Member Since Date	Constituent profile, Membership Information	N/A	N/A	The Member Since Date field does not map to <i>The Raiser's Edge</i> .
Donor Status	Constituent profile, Biographical Information	N/A	N/A	The Donor Status field does not map to <i>The Raiser's Edge</i> .

Gift Field Mapping

In both **Luminate Online** and **The Raiser's Edge**, you track information about donations and gifts given to your organization, such as amount, date, and receipts. When you transfer data between the two programs, you transfer information from your **Luminate Online** donations to gift records in **The Raiser's Edge**. For information about how to download information from **Luminate Online**, see Download Donations and Gifts from Luminate Online on page 22.

TeamRaiser donations from **Luminate Online** also transfer to **The Raiser's Edge**. Team Raiser donations and registrations appear in **The Raiser's Edge** as normal gifts, but on the Attributes tab of the gift record, the TeamRaiser donation form name and TeamRaiser donation type appear. Participation types, as well as information such as team name, if the constituent is a team captain, and the URL of the page on which the constituent registered the Attributes tab of the event registrant record in **The Raiser's Edge**.

Note: If the donation from **Luminate Online** is a tribute, that information appears on the Tributes tab of the gift record in **The Raiser's Edge**. Tribute first name, last name, type, and the tribute message are transferred, as well as all acknowledgee address information.

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
The Raiser's Edge Campaign	Luminate Configuration, Cross References, Configure Cross References page	Campaign	Gift record, Gift tab	
The Raiser's Edge Fund	Luminate Configuration, Cross References, Configure Cross References page	Fund	Gift record, Gift tab	
The Raiser's Edge Appeal field	Luminate Configuration, Cross References, Configure Cross References page	Appeal	Gift record, Gift tab	
The Raiser's Edge Package	Luminate Configuration, Cross References, Configure Cross References page	Package	Gift record, Gift tab	
The Raiser's Edge Gift Subtype	Luminate Configuration, Cross References, Configure Cross References page	Gift Subtype	Gift record, Gift tab	
Type	Constituent profile, Transactions	Gift Type	Gift record, Gift tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	tab, Transaction History grid			
Donation Date	Constituent profile, Transactions tab, Transaction History grid	Gift Date	Gift record, Gift tab	
Amount	Constituent profile, Transactions tab, Transaction History grid	Credit no./exp.	Gift record, Gift tab	The credit card number in Luminate Online appears in the Amount field of the Transaction History grid.
Amount	Constituent profile, Transactions tab, Transaction History grid	Check No./Date	Gift record, Gift tab	The check number in Luminate Online appears in the Amount field of the Transaction History grid.
Amount	Constituent profile, Transactions tab, Transaction History grid	Card Type	Gift record, Gift tab	The credit card type in Luminate Online appears in the Amount field of the Transaction History grid.
Amount	Constituent profile, Transactions tab, Transaction History grid	Amount	Gift record, Gift tab	
Billing Street 1	Constituent profile, Interactions tab, donation record, Interaction Details	Address Lines	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Billing Street 2	Constituent profile, Interactions tab, donation record, Interaction Details	Address Lines	Constituent record, Bio 1 tab	
Billing City	Constituent profile, Interactions tab, donation record, Interaction Details	City	Constituent record, Bio 1 tab	
Billing State	Constituent profile, Interactions tab, donation record, Interaction Details	State	Constituent record, Bio 1 tab	
Billing Country	Constituent profile, Interactions tab, donation record, Interaction Details	Country	Constituent record, Bio 1 tab	
Billing ZIP/Postal Code	Constituent profile, Interactions tab, donation record, Interaction Details	ZIP	Constituent record, Bio 1 tab	
Transaction Receipt	Constituent profile, Transactions tab, Actions column, View	Receipt Amt/No.	Gift record, Gift tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Receipt				
Transaction Date	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt	Gift record, Gift tab	
Transaction Amount	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt Amt/No.	Gift record, Gift tab	
Name	Setup, Receipt Manager	Receipt Stack	Gift record, Gift tab	<p>In Luminate Online, the name of the receipt template you create maps to the Receipt Stack field in The Raiser's Edge.</p> <p>The Receipt Stack field is a Canadian-only field, and does not appear in United States databases.</p>
N/A	N/A	Tribute	Gift record, Tribute tab	Tribute information comes from the donation form configured in Luminate Online .
N/A	N/A	Tribute Type	Gift record, Tribute tab	Tribute information comes from the donation form configured in Luminate Online .
N/A	N/A	Tribute	Gift record, Tribute	Tribute information

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
		Description	tab	comes from the donation form configured in Luminate Online .
N/A	N/A	Tribute Acknowledgee Name	Gift record, Tribute tab, Tribute Gift record, Acknowledgees grid	Tribute information comes from the donation form configured in Luminate Online .
N/A	N/A	Tribute Acknowledgee Address lines	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to The Raiser's Edge .
N/A	N/A	Tribute acknowledgee City	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to The Raiser's Edge .
N/A	N/A	Tribute Acknowledgee State	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
				to <i>The Raiser's Edge</i> .
N/A	N/A	Tribute Acknowledgee ZIP	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
N/A	N/A	Tribute Acknowledgee Country	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
N/A	N/A	Tribute Acknowledgee Email	Individual Relationship record for tribute acknowledgee, Phones/Email/Links grid	To view acknowledgee email information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .

Attribute Field Mapping

Certain information from your donation forms in Luminate Online transfer to The Raiser's Edge as attributes.

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
		Credit no./exp.	Gift record, Gift tab	The credit card

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
				number in Luminate Online appears in the Amount field of the Transaction History grid.
	Constituent profile, Transactions tab, Transaction History grid	Check no./date	Gift record, Gift tab	The check number in Luminate Online appears in the Amount field of the Transaction History grid.
	Constituent profile, Transactions tab, Transaction History grid	Card type	Gift record, Gift tab	The credit card type in Luminate Online appears in the Amount field of the Transaction History grid.
	Constituent profile, Transactions tab, Transaction History grid	Amount	Gift record, Gift tab	
	Constituent profile, Interactions tab, donation record, Interaction Details	Address Lines	Constituent record, Bio 1 tab	
	Constituent profile, Interactions tab, donation	Address Lines	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	record, Interaction Details			
	Constituent profile, Interactions tab, donation record, Interaction Details	City	Constituent record, Bio 1 tab	
Billing State	Constituent profile, Interactions tab, donation record, Interaction Details	State	Constituent record, Bio 1 tab	
Billing Country	Constituent profile, Interactions tab, donation record, Interaction Details	Country	Constituent record, Bio 1 tab	
Billing ZIP/Postal Code	Constituent profile, Interactions tab, donation record, Interaction Details	ZIP	Constituent record, Bio 1 tab	
Transaction Receipt	Constituent profile, Transactions tab,	Receipt Amt/No.	Gift record, Gift tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Actions column, View Receipt			
Transaction Date	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt	Gift record, Gift tab	
Transaction Amount	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt Amt/No.	Gift record, Gift tab	
Name	Setup, Receipt Manager	Receipt Stack	Gift record, Gift tab	<p>In Luminate Online, the name of the receipt template you create maps to the Receipt Stack field in The Raiser's Edge.</p> <p>The Receipt Stack field is a Canadian-only field, and does not appear in United States databases.</p>
		Tribute	Gift record, Tribute tab	
		Tribute Type field	Gift record, Tribute tab	
		Tribute Description	Gift record, Tribute	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
		field	tab	
		Tribute Acknowledgee Name field	Gift record, Tribute tab, Tribute Gift record, Acknowledgees grid	
		Tribute Acknowledgee Address lines	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
		Tribute Acknowledgee City	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
		Tribute Acknowledgee State	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
		Tribute Acknowledgee ZIP	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
		Tribute Acknowledgee Country	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
		Tribute AcknowledgeeEmail	Individual Relationship record for tribute acknowledgee, Phones/Email /Links grid	To view acknowledgee email information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .

Gift Attributes Tab

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location
		Luminate Online Gift ID	Constituent > Gift, Attributes

	Tab
Luminate Online Donation Type	Constituent > Gift, Attributes Tab
Luminate Online Donation Form	Constituent > Gift, Attributes Tab

Event Field Mapping

In both **Luminate Online** and **The Raiser's Edge**, you track information about your organization's TeamRaiser and Calendar events, such as attendee, event name, and transactions amounts. When you transfer data between the two programs, you transfer information from your **Luminate Online** events to event records in **The Raiser's Edge**. **The Raiser's Edge** can also create new event records for new participants in **Luminate Online**. For information about how to download constituent updates from **Luminate Online**, see Download constituent information from Luminate Online on page 18.

Calendar Events

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Ticket Class	Event Attendee, Refund Transaction	Unit	Participant Record, Registration Fees Tab	Unit name
Tickets Current	Event Attendee, Refund Transaction	Num. Units	Participant Record, Registration Fees Tab	Total number of units purchased
Transaction Amount	Event Attendee, Refund Transaction	Gift Amount	Participant Record, Registration Fees Tab	Total gift amount
Amount Tax Deductible	Event Attendee, Refund Transaction	Receipt Amount	Participant Record, Registration Fees Tab	Any applicable receipt amount
Transaction Date	Event Attendee, Refund Transaction	Date	Participant Record, Registration Fees Tab	Registration date

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
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action

	Event Attendee, Refund Transaction	Comments	Participant Record, Registration Fees Tab	Luminate Registration Fee
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Survey Questions	Event Attendee, Edit Responses	Any Attributes	Participant Record, Attributes Tab	
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Calendar Event Gift from View Gifts Link

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
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Luminate Online Donation Type

Constituent > Gift > Attributes Tab

Ticket

Event > Name	Event Attendee, Refund Transaction	Luminate Online Event Name	Constituent > Gift > Attributes Tab	LO event name appended with event date
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All Tickets, their quantity, totals and any additional gift associated with this transaction

Event Attendee, Refund Transaction, no single field

Luminate Online Ticket Description
Luminate Gift ID

Constituent > Gift > Attributes Tab

All units with quantity, totals and additional gift example Gold Qty(2) @ \$50.00 totalling \$100.00
Additional gift of \$25.99

Constituent > Gift > Attributes Tab

Luminate gift ID

TeamRaiser Fields

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
		Registration	Participant Record, General Registration field	Should display registered
Amount	Participant Registration Information, Luminate Online Gift History section	Amount Paid	Participant Record, Registration Fees Tab	View Gifts enabled only if there is any registration fee
Registration	Participant Registration Information, Luminate Online Gift History section	Date Paid	Participant Record, Registration Fees Tab	
Gift Date	Participant Registration Information, Luminate Online Gift History section	Donation Gift Date	Participant Record, Donations Tab	If registration has additional gifts
NA		Donation Gift Type	Participant Record, Donations Tab	Always CASH
Additional Gift	Participant Record, Edit Registration	Amount	Participant Record, Donations Gift record	
Name	Participant Record, Right below the registration Information	Constituent Name	Participant Record, Donations Constituent	
Participation	Participant	TR	Participant Record,	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Type	Registration Information	Participation Type	Attributes/Notes Tab	
Team Name	Participant Registration Information	TR Team Name	Participant Record, Attributes Tab	
Captain	Participant Registration Information Team Name section	TR Team Captain	Participant Record, Attributes Tab	
		TR Discount Code	Participant Record, Attributes Tab	
		TR Discount Amount	Participant Record, Attributes Tab	
	Participant Registration Information	TR Participant Page	Participant Record, Attributes Tab	
Participant Company	Participant Registration Information	TR Company Name	Participant Record, Attributes Tab	
Upsell Name	Participant Record, Edit Registration	TR Upsell	Participant Record, Attributes Tab	
		Luminate Online Registration ID	Participant Record, Attributes Tab	
Additional Information	Participant Record, Edit Registration	Any Attributes	Participant Record, Attributes Tab	

TeamRaiser Gift from View Gifts Link

Luminate Online	Luminate Online	The Raiser's Edge Field	The Raiser's Edge Location
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Field	Location
Luminate Online Gift ID	Constituent > Gift, Attributes Tab
Luminate Online Donation Type	Constituent > Gift, Attributes Tab
Luminate Online Donation Form	Constituent > Gift, Attributes Tab

How It Works

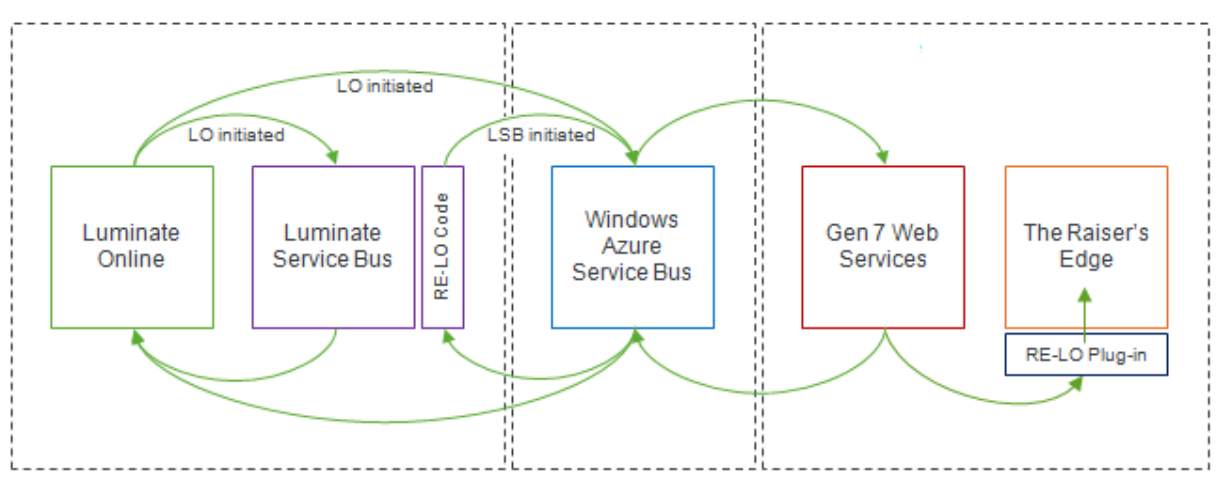
Luminate Online and **The Raiser's Edge** pass constituent and gift information back and forth with the help of the Luminate Service Bus, Microsoft Windows Azure Service Bus, and **Blackbaud** Web Services. When donations are accepted or when changes are made in **Luminate Online**, they are sent to the Luminate Service Bus where they are stored. The updates are then sent to **The Raiser's Edge** through **Blackbaud** Web Services so they can be reviewed before being committed to your database.

The transfer of data works differently if you host your own database on-premise, or if **Blackbaud** hosts your database.

On-Premise Database

If you host your own database in **The Raiser's Edge**, constituent and gift information accepted in **Luminate Online** flow from **Luminate Online** into the Luminate Service Bus where it is stored. That information is then passed into the Microsoft Windows Azure Service Bus using 128-bit TLS encryption. **Blackbaud** Web Services then retrieves the constituent and gift updates and brings them into the Luminate Online Integration page in your database of **The Raiser's Edge** to be reviewed.

If **Blackbaud** hosts your instance of **Luminate Online**, but you host your own database in **The Raiser's Edge**, the integration supports https encryption.

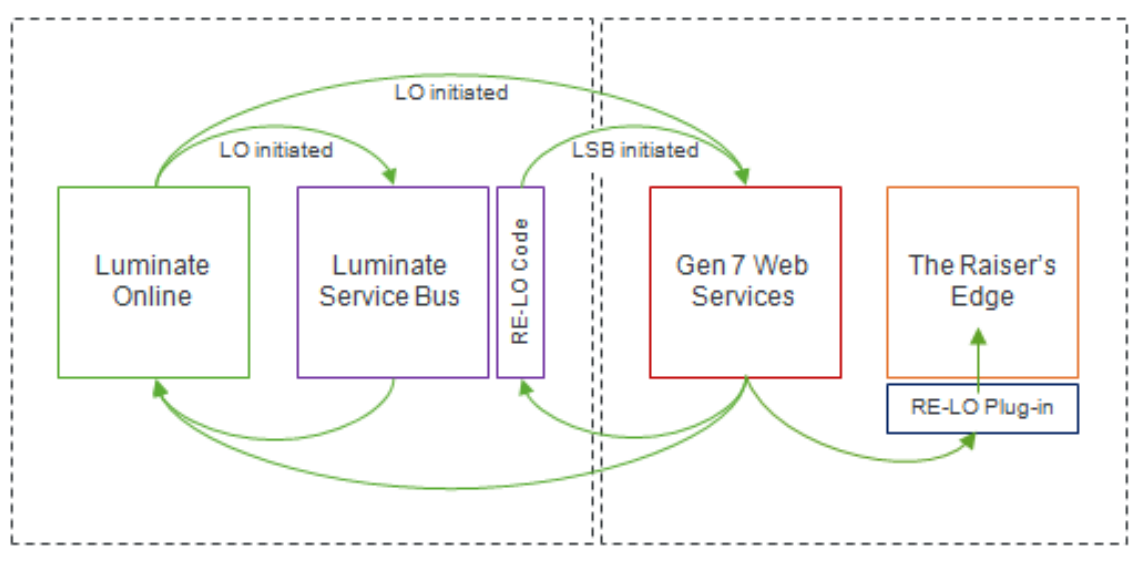


For every request that comes into *Blackbaud* Web Services through *Microsoft* Windows Azure, a valid set of **The Raiser's Edge** user credentials are necessary. **The Raiser's Edge** Supervisor user credentials cannot be used.

Note: The *Blackbaud* Web Service connects out to *Microsoft* Windows Azure, so you do not need to open any incoming ports on **The Raiser's Edge** firewall. You cannot control security on the *Microsoft* Windows Azure Service Bus or manage its incoming ports. If you are concerned with locking down outgoing ports in your firewalls, the ports the *Blackbaud* Web Service would need to use to contact out to Azure are 80(http), 443 (https), and 9350-9353.

Blackbaud Hosted Database

If *Blackbaud* hosts your database in **The Raiser's Edge**, constituent and gift information accepted in **Luminate Online** flows from **Luminate Online** into the Luminate Service Bus where it is stored. *Blackbaud* Web Services then retrieves the constituent and gift updates and brings them into the Luminate Online Integration page in your database of **The Raiser's Edge** to be reviewed.



New Features and Enhancements

This guide provides an overview of all the new features and fixes in the **Luminate Online** and **The Raiser's Edge** integration.

