The Raiser's Edge™

CounterPoint SQL Integration Guide

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Contents

WHAT IS IN THIS GUIDE? v

THE RAISER'S EDGE AND COUNTERPOINT SQL INTEGRATION 1

Benefits of Integration 3
Requirements for Integration 4
CounterPoint SQL Integration Page 4
How Does Integration Work? 6
Step 1: Meet the Requirements for Integration 6
Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface 8
Step 3: Manage Constituents and Memberships 16
Step 4: Access Ticket Entry from The Raiser's Edge 32
Step 5: Download Donations from CounterPoint SQL 33
Step 6: Download Membership Transactions from CounterPoint SQL 38
Step 7: Access CounterPoint SQL Reports from The Raiser's Edge 44

INDEX 45

What Is In This Guide?

In the *CounterPoint SQL Integration Guide*, you learn how to integrate *CounterPoint SQL*, an inventory management and graphical product sales system, with ***The Raiser's Edge***. You can also learn about the following:

- "Benefits of Integration" on page 3
- "Requirements for Integration" on page 4
- "How Does Integration Work?" on page 6
- "CounterPoint SQL Integration Security" on page 7
- "Connect The Raiser's Edge and CounterPoint SQL Databases" on page 8

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults." The help file searches for the complete phrase in quotes instead of individual words.

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The Raiser's Edge and CounterPoint SQL Integration

Benefits of Integration . . . 3
Requirements for Integration . . . 4
CounterPoint SQL Integration Page . . . 4
How Does Integration Work? . . . 6
Step 1: Meet the Requirements for Integration . . . 6
CounterPoint SQL Integration Security . . . 7
Step 2: Set up of The Raiser's Edge and CounterPoint SQL Interface . . . 8
Connect The Raiser's Edge and CounterPoint SQL Databases . . . 8
Field Mapping . . . 14
Transfer Constituents from The Raiser's Edge to CounterPoint SQL . . . 14
Create New Constituents in The Raiser's Edge from CounterPoint SQL . . . 15
Step 3: Manage Constituents and Memberships . . . 16
Transfer Constituent Data to CounterPoint SQL . . . 16
General Tab . . . 17
Ind. Address Tab . . . 18
Org. Address Tab . . . 21
Additional Information Tab . . . 24
Membership Processing Tab . . . 25
Summary Tab . . . 26
Transfer Constituents to CounterPoint SQL Procedure . . . 26
Update CounterPoint SQL Membership Information . . . 28
Update Constituent Information in CounterPoint SQL . . . 31
Step 4: Access Ticket Entry from The Raiser's Edge . . . 32
Step 5: Download Donations from CounterPoint SQL . . . 33
CounterPoint SQL Ticket Items . . . 36
Step 6: Download Membership Transactions from CounterPoint SQL . . . 38
CounterPoint SQL Ticket Items . . . 42
Step 7: Access CounterPoint SQL Reports from The Raiser's Edge . . . 44

Procedures

Assign CounterPoint SQL Integration security . . . 7
Connect The Raiser's Edge and CounterPoint SQL databases . . . 9

Map funds and memberships to product inventory 10
Select constituent records to transfer. 17
Select individual constituent address data to transfer 19
Select organization constituent address and contact information data to transfer 21
Set CounterPoint SQL information for transfer 24
Select constituent membership data to transfer 25
Transfer constituents to CounterPoint SQL 27
Update CounterPoint SQL membership information. 29
Access Ticket Entry 32
Download donations. 34
Download membership transactions 38

Using Radiant Systems *CounterPoint SQL* with ***The Raiser's Edge*** enables you to integrate your product sales with your fundraising efforts. From within ***The Raiser's Edge,*** you can access *CounterPoint SQL*'s ticket entry system, access media and sales tracking reports, and download donations from the product sales system. While increasing efficiency and accountability, this integration helps support your mission and develop your constituency. Also, if you have the optional module *Membership Management*, you can sell products based on membership status and upgrade, renew, downgrade, or sell a membership.

This guide provides an overview of the benefits of using *CounterPoint SQL* with ***The Raiser's Edge*** and a step-by-step approach to set up and use the integrated system. To plan the level of integration and accountability needed, set up the integrated system, and establish data entry procedures, key members of both the development and business offices should review this guide.

Benefits of Integration

Warning: Involve key fundraising and sales representatives in planning the integration.

Traditionally, product sales and fundraising efforts of nonprofit organizations are done separately. However, with the integration of ***The Raiser's Edge*** for fundraising needs and *CounterPoint SQL* for product sales needs, your organization can achieve a new level of success, efficiency, and productivity.

Improved efficiency. With integration, ***The Raiser's Edge*** can transfer constituents and memberships to *CounterPoint SQL,* eliminating the need for imports and extra data entry. After you initially transfer constituents, you can send new ***Raiser's Edge*** constituents as needed. Also, when you download new donations from *CounterPoint SQL*, ***The Raiser's Edge*** can determine if a new constituent record is required.

Downloading donations, taken at the time of the product sale, can improve your efficiency in fundraising. Downloading donations eliminates the manual entry of donations, reduces the possibility of duplicate gifts, and increases the opportunities for constituents to give.

If you have the optional module *Membership Management*, you can improve efficiency by selling products in *CounterPoint SQL* based on membership status. You can also upgrade, renew, or purchase new memberships for constituents in *CounterPoint SQL*. With the **Download Membership Transactions** function in ***The Raiser's Edge***, you can update membership information on constituent records.

Note: For more information about Security rights, see the *Configuration and Security Guide*.

Enhanced accessibility. Integrating *CounterPoint SQL* with ***The Raiser's Edge*** enables you to access product sales in two different ways, depending on your organization's needs.You can access *CounterPoint SQL* as a standalone program, or, after you integrate, you can access *CounterPoint SQL's* **Ticket Entry** screen and **Reports** from ***The Raiser's Edge***. As an added convenience, all functions related to integration, except designating security rights, are in one location in ***The Raiser's Edge***.

Greater cccountability. Accountability is an important aspect of a nonprofit organization's operation. With integration, you have export extensions available to export *CounterPoint SQL* data from ***The Raiser's Edge*** and create new custom views.

Increased understanding and development of constituency. With the integration of fundraising and product sales, you can better understand your constituents and their needs. To track sales and the type of products that interest your constituents, you can create reports from *CounterPoint SQL*. Knowing the type of products that interest your constituents can help determine the type of fundraising efforts that may be successful in the future.

Requirements for Integration

Warning: Before you integrate with ***The Raiser's Edge***, we suggest you familiarize yourself with *CounterPoint SQL*. For more information about *CounterPoint SQL*, see the *CounterPoint SQL* Online Help. To access help, select **Help**, **Contents and Index** from the *CounterPoint SQL* menu bar.

To set up ***The Raiser's Edge*** and *CounterPoint SQL* integration and perform integration tasks, you must meet the following requirements:

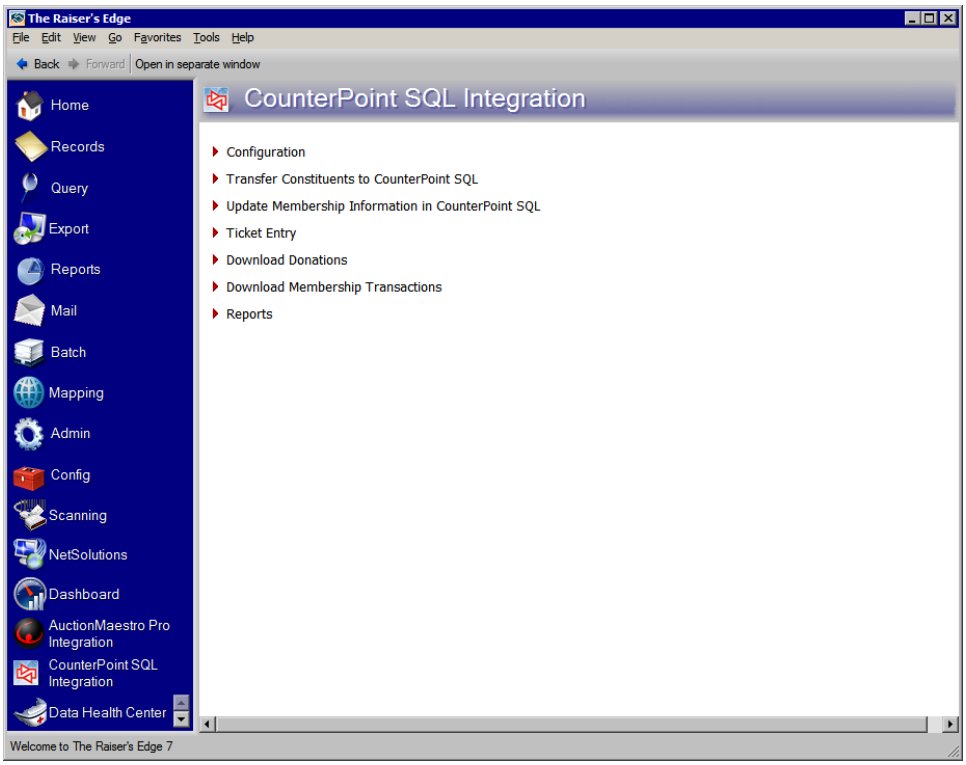
- ***The Raiser's Edge*** version ***7.81*** or higher must be installed.
- *CounterPoint SQL* version *8.3.4* or higher must be installed.
- ***The Raiser's Edge*** and *CounterPoint SQL* must be installed on the same workstation for **Ticket Entry** and *CounterPoint SQL* **Reports**.

  For all other tasks, the *CounterPoint SQL* database must be accessible by the server. For more information on connecting your *CounterPoint SQL* database to ***The Raiser's Edge*** database, see "Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface" on page 8.
- To access **CounterPoint SQL Integration** in ***The Raiser's Edge***, you must set up security rights. For more information on accessing **Security** in *Administration*, see the Security chapter of the *Configuration and Security Guide*. For information on the security rights you need for setup, see "Step 1: Meet the Requirements for Integration" on page 6.
- For any tasks involving memberships, you must have the optional module *Membership Management*.

CounterPoint SQL Integration Page

Note: If you cannot see the **CounterPoint SQL Integration** button on the Raiser's Edge bar, verify *CounterPoint SQL* is installed correctly and that you have security rights. For more information on security rights, see "Step 1: Meet the Requirements for Integration" on page 6.

When you click **CounterPoint SQL Integration** on the Raiser's Edge bar, the CounterPoint SQL Integration page appears on the right side of the screen.



To help you successfully integrate and complete integration tasks, the CounterPoint SQL Integration page includes a number of links.

Configuration. To connect to the *CounterPoint SQL* database, input *CounterPoint SQL* launch information and map ***The Raiser's Edge*** funds and memberships to *CounterPoint SQL* product inventory, click **Configuration**.

Transfer Constituents to CounterPoint SQL. To open a wizard to determine the constituent and membership information to transfer to the *CounterPoint SQL* database, click this link.

Warning: When you update membership information in *CounterPoint SQL, you* overwrite all existing membership record data. Update memberships only if you are prepared to update all your records.

Update Membership Information in CounterPoint SQL. After you transfer constituent and membership information to *CounterPoint SQL*, you use this link to overwrite previous membership information you transferred to *CounterPoint SQL*.

Ticket Entry. When you click **Ticket Entry**, the *CounterPoint SQL* Ticket Entry screen appears. On this screen you can enter product sales, accept donations, and sell, update, or renew memberships.

Download Donations. After you map *CounterPoint SQL* products to ***Raiser's Edge*** funds, you can download gifts entered in *CounterPoint SQL*. On the Download Donations screen, if no link exists between ***The Raiser's Edge*** constituent record and the *CounterPoint SQL* customer record, you link the *CounterPoint SQL* customer to a new or existing ***Raiser's Edge*** constituent record.

Download Membership Transactions. If you have the optional module *Membership Management*, on the Download Membership Transactions screen, you can download new, upgraded, or renewed membership transactions from *CounterPoint SQL*. On the Download Membership Transactions screen, if no link exists between ***The Raiser's Edge*** constituent record and the *CounterPoint SQL* customer record, you link the *CounterPoint SQL* customer to a new or existing ***Raiser's Edge*** constituent record.

Reports. The **Reports** link accesses 11 *CounterPoint SQL* reports you can launch from ***The Raiser's Edge***. When you click **Other CounterPoint SQL Reports**, you access all reports available in *CounterPoint SQL*.

How Does Integration Work?

Note: This guide is specific to the integration between ***The Raiser's Edge 7.81*** or higher and *CounterPoint SQL 8.3.4* or higher.

The Raiser's Edge and *CounterPoint SQL* integration involves a series of steps that help you set up integration, transfer constituent data to *CounterPoint SQL* to prepare for product sales, and become familiar with new integration procedures.

Step 1: Meet the Requirements for Integration. In this step, you set up security rights and review the requirements for integration.

Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface. In this step, you configure integration settings and map ***The Raiser's Edge*** funds and memberships to *CounterPoint SQL* inventory.

Warning: For any tasks involving memberships, you must have the optional module *Membership Management*.

Step 3: Manage Constituents and Memberships. In this step, you transfer ***Raiser's Edge*** constituent records to *CounterPoint SQL* in preparation for product sales. You also learn how to transfer constituents and update memberships after the initial data transfer.

Step 4: Access CounterPoint SQL Ticket Entry from The Raiser's Edge. In this step, you access the *CounterPoint SQL* product sales system Ticket Entry screen from ***The Raiser's Edge***.

Step 5: Download Donations from CounterPoint SQL. In this step, you download new donations entered in *CounterPoint SQL*.

Step 6: Download Membership Transactions from CounterPoint SQL. In this step, you download new, upgraded, or renewed memberships entered in *CounterPoint SQL*.

Step 7: Access CounterPoint SQL Reports from The Raiser's Edge. In this step, you access *CounterPoint SQL* reports from within ***The Raiser's Edge***.

Warning: For any tasks involving memberships, you must have the optional module *Membership Management*.

Step 1: Meet the Requirements for Integration

Before you set up the interface between ***The Raiser's Edge*** and *CounterPoint SQL*, you must install ***The Raiser's Edge 7.81*** or higher. For information on how to install ***The Raiser's Edge***, see the *Installation Guide*. You also must install *CounterPoint SQL 8.3.4* or higher. For information on how to install *CounterPoint SQL*, contact your Radiant Systems authorized dealer.

Once you have ***The Raiser's Edge*** and *CounterPoint SQL* installed, you must unlock the *CounterPoint SQL Integration* module. For information on unlocking optional modules, see the Program Basics chapter in the *Program Basics Guide*.

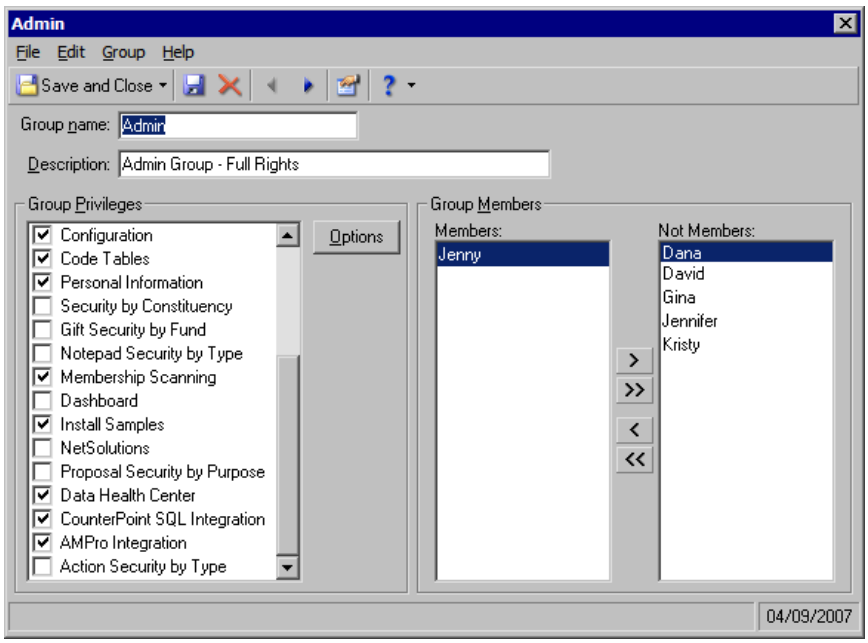
After you unlock the module, you can set security rights for your security groups.

CounterPoint SQL Integration Security

All *CounterPoint SQL* integration security options, except for **Configuration**, default to marked. This way, security groups can perform integration tasks while protecting configuration tasks to those in your organization with the ability to set up integration correctly. Before you assign *CounterPoint SQL* Integration security, consider the security groups you need. For more information on managing security and creating security groups, see the Security chapter of the *Configuration and Security Guide*.

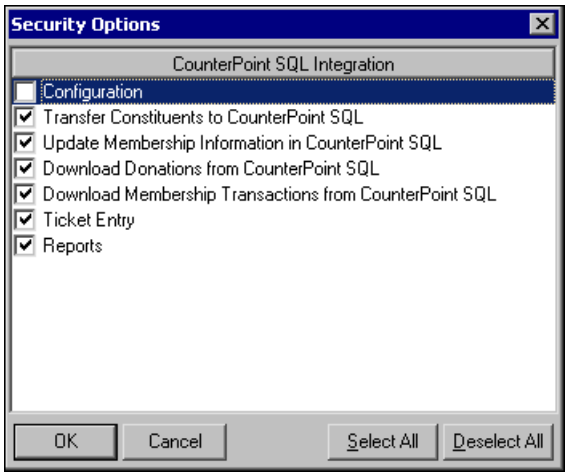
- **Assign CounterPoint SQL Integration security**

  1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
  2. Click **Security**. The Security page appears.
  3. Select the group whose security rights you want to change.
  4. On the action bar, click **Open** . The Group screen appears.



  5. In the **Group Privileges** box, select **CounterPoint SQL Integration**. The checkbox defaults to marked and the **Options** button is enabled. If you do not want a security group to have access to **CounterPoint SQL Integration**, unmark the checkbox.

6. Click **Options**. The Security Options screen appears.



7. Mark the checkboxes for the security rights to enable for the group. Unmark any checkboxes for rights you want to take away.
8. Click **OK**. You return to the Group screen.
9. To save your *CounterPoint SQL* integration security settings, click **Save and Close**.

Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface

In the **Configuration** frame of the CounterPoint SQL Integration page, you establish settings for the interface between ***The Raiser's Edge*** and *CounterPoint SQL*.

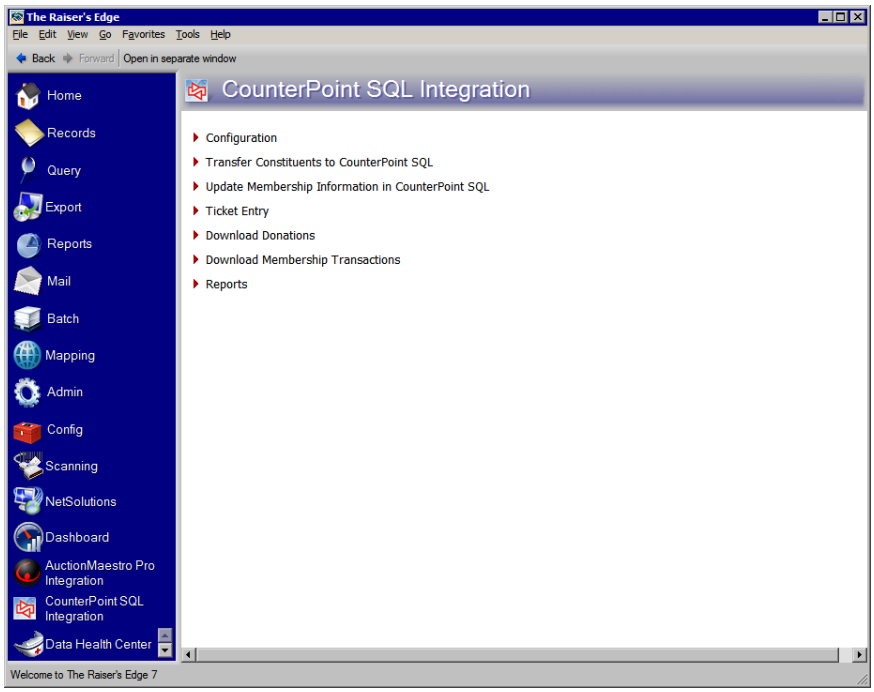
Connect The Raiser's Edge and CounterPoint SQL Databases

Warning: To establish connection settings, you must have *CounterPoint SQL* configuration security rights. For more information, see "CounterPoint SQL Integration Security" on page 7.

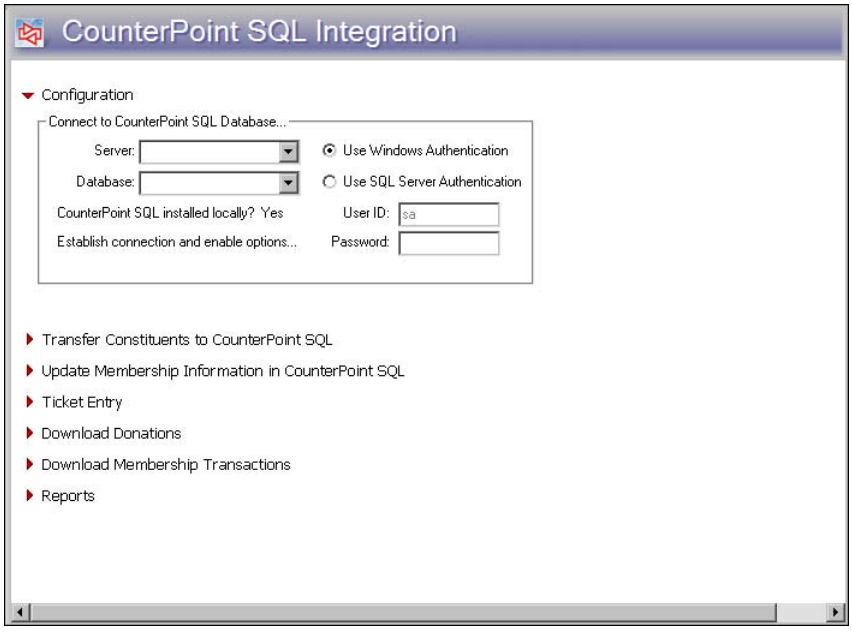
You must establish a link to the *CounterPoint SQL* database. You can also specify how to authenticate the connection with *Windows Authentication* or *SQL Server Authentication*.

Connect The Raiser's Edge and CounterPoint SQL databases

1. On the Raiser's Edge bar, click **CounterPoint SQL Integration**. The CounterPoint SQL Integration page appears.



2. Click **Configuration**. The **Configuration** frame appears.



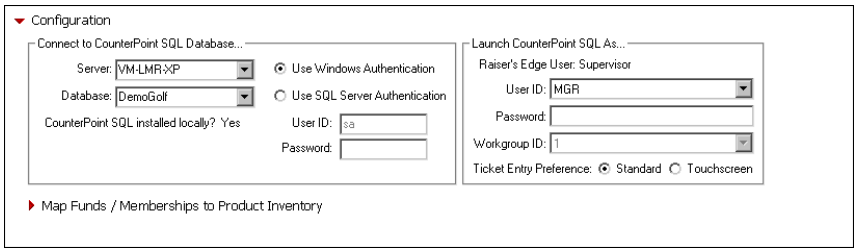
Note: If you are unsure of your server name, your network administrator should supply you with it.

3. In the **Server** field, enter the server on which your *CounterPoint SQL SQL Server* database resides.

4. In the **Database** field, select the name of the database to which you are connecting. The **CounterPoint SQL installed locally** field informs you if you have *CounterPoint SQL* installed correctly on your local workstation. If you do not have *CounterPoint SQL* installed locally, enter the database name in the **Database** field.
5. Specify how to authenticate your connection to the server:
   - To use your *Windows* login credentials, select **Use Windows Authentication**.
   - To use your *SQL Server* login credentials, select **Use SQL Server Authentication**. When you select **Use SQL Server Authentication**, enter your **User ID** and **Password**.
6. Click **Establish connection and enable options**. To inform you the connection was successful, a message appears.

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

7. Click **OK**. You return to the **Configuration** frame. A **Launch CounterPoint SQL As** frame and a **Map Funds / Memberships to Product Inventory** link appear.



Warning: Any time you change your login credentials in *CounterPoint SQL,* you must update your **Launch CounterPoint SQL As** settings in ***The Raiser's Edge***.

8. In the **Launch CounterPoint SQL As** frame, the **Raiser's Edge User** field informs you which user name is logged in. For each ***Raiser's Edge*** user, you can establish **Launch CounterPoint SQL As** settings. All these fields are optional and bypass the *CounterPoint SQL* login screen.
   a. In the **User ID** field, select the *CounterPoint SQL* **User ID** you want automatically logged in when the user clicks **Ticket Entry**.
   b. In the **Password** field, enter the password for your **User ID**. If you have more than one **Workgroup ID**, select the one you want to associate with the **User ID**.
   c. Select the **Standard** or **Touchscreen** option for your **Ticket Entry** preference.

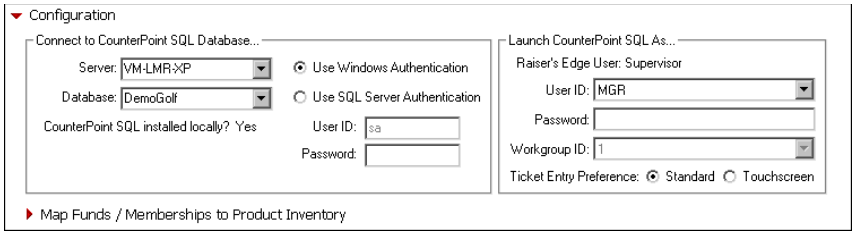
▸ **Map funds and memberships to product inventory**

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

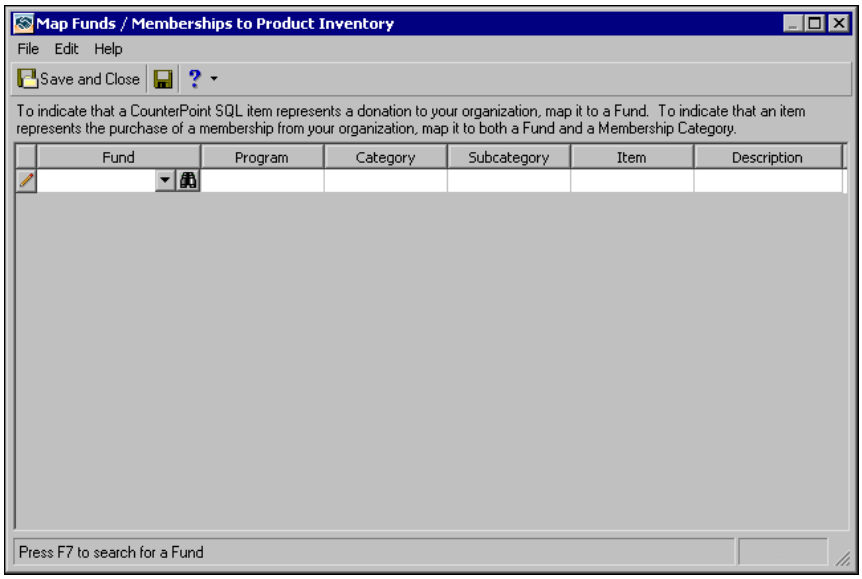
With the **Map Funds / Memberships to Product Inventory** link, you map ***Raiser's Edge*** funds to *CounterPoint SQL* product inventory donation items and ***Raiser's Edge*** funds, programs, categories, and subcategories to *CounterPoint SQL* product inventory membership items. This enables you to download new donations and membership changes taken in *CounterPoint SQL*.

Warning: Before you map ***Raiser's Edge*** funds and memberships to *CounterPoint SQL* product inventory, set up all of your inventory and non-inventory items in *CounterPoint SQL*. For more information, see the *CounterPoint SQL* help file.

1. On the CounterPoint SQL Integration page, click **Configuration**. The **Configuration** frame appears.

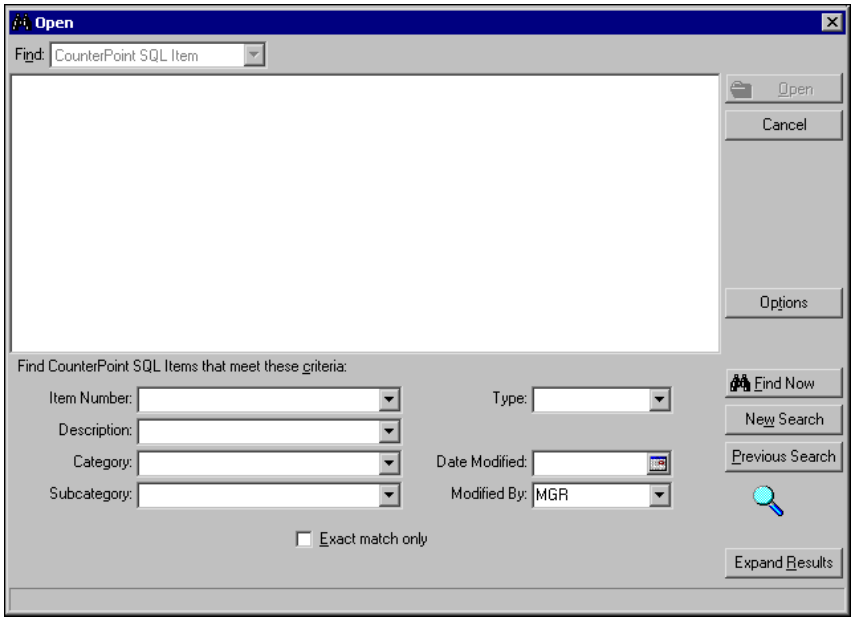


2. Click **Map Funds / Memberships to Product Inventory**. The Map Funds / Memberships to Product Inventory screen appears.

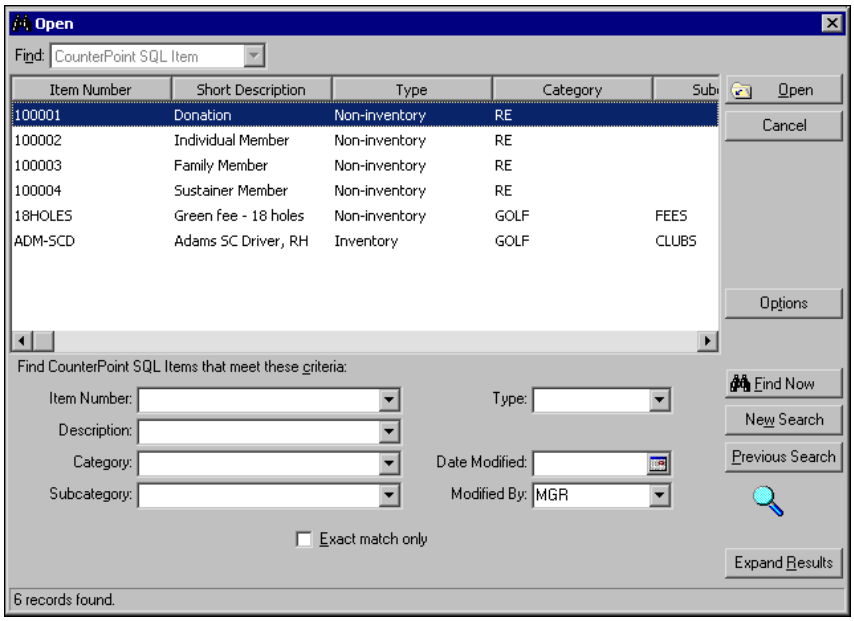


3. To take donations in *CounterPoint SQL*, in the **Fund** column, select a ***Raiser's Edge*** fund or click the binoculars to search for your fund.

4. In the **Item** column, click the binoculars to search for the *CounterPoint SQL* item to map to the ***Raiser's Edge*** fund. The Open screen appears.



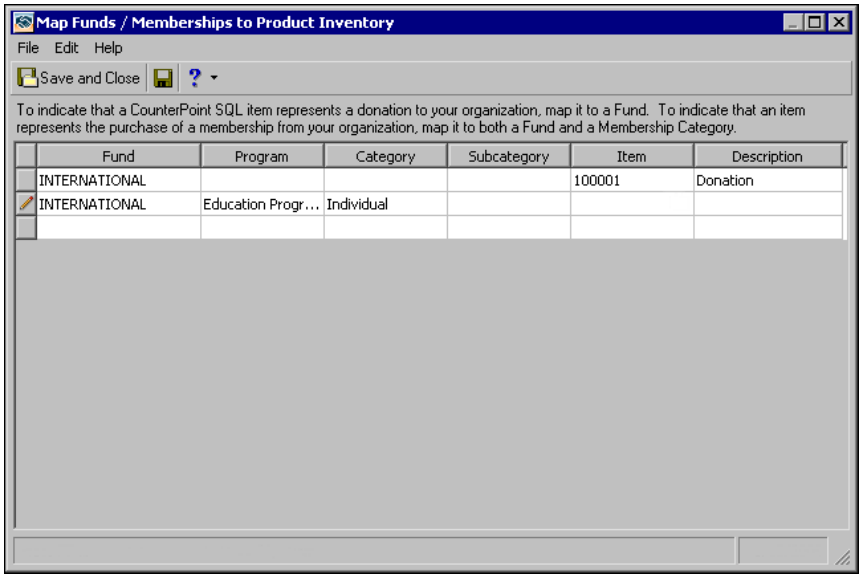
5. In the **Find CounterPoint SQL items that meet these criteria** frame, enter the criteria to use to search for the *CounterPoint SQL* item. The criteria you can use includes the **Item Number**, **Description**, **Category**, **Subcategory**, **Type**, **Date Modified**, and **Modified by**.
6. After you enter your search criteria, click **Find Now**. The program searches your *CounterPoint SQL* database and displays all items that meet your search criteria. Depending on how limited or detailed your criteria are, the program may find one item or many items.
7. In the grid, select the item to open.



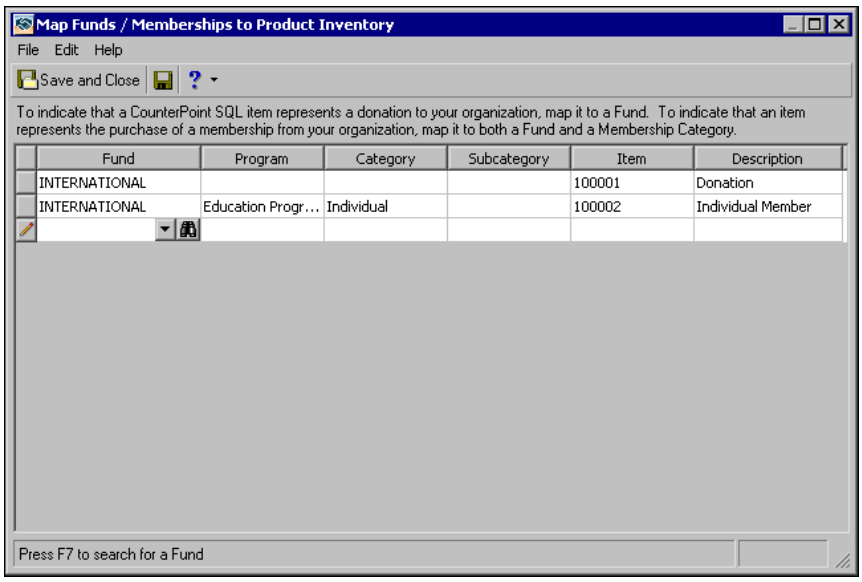
8. Click **Open**. You return to Map Funds / Memberships to Product Inventory screen.

Warning: To ensure ***The Raiser's Edge*** downloads membership transactions accurately, you must map every membership program category to a unique *CounterPoint SQL* item.

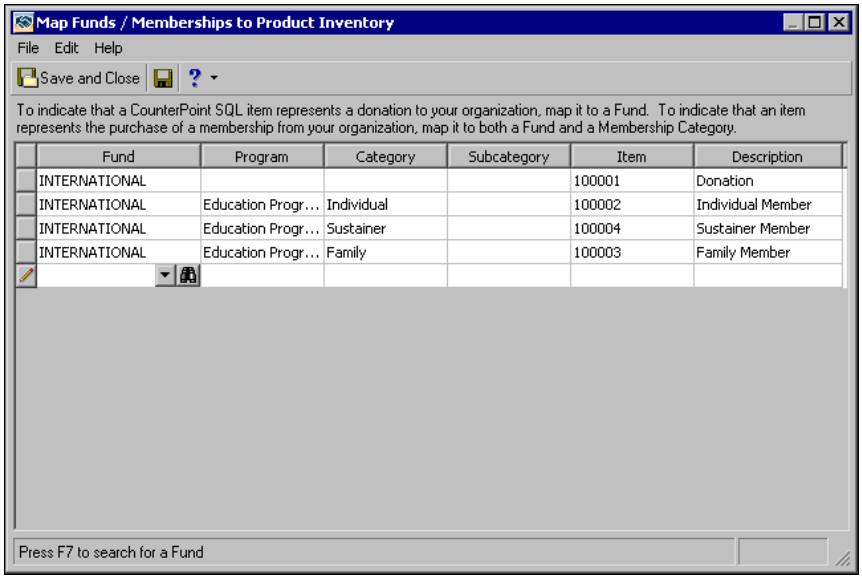
9. If you have *Membership Management*, you can map each membership you want available to amend in *CounterPoint SQL*.
   a. In the **Fund** column, select a ***Raiser's Edge*** fund or click the binoculars to search for your fund.
   b. In the **Program** column, **Category** column, and **Subcategory** column, select ***The Raiser's Edge*** membership to map to the *CounterPoint SQL* item.



   c. In the **Item** column, select the *CounterPoint SQL* item to map to ***The Raiser's Edge*** membership.



10. When you finish mapping funds and memberships to *CounterPoint SQL* items, click **Save and Close** on the toolbar.



Field Mapping

This section provides a general overview of the field mapping that occurs in the integration between ***The Raiser's Edge*** and *CounterPoint SQL*.

Transfer Constituents from The Raiser's Edge to CounterPoint SQL

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

This table shows the location of each field in ***The Raiser's Edge*** and the corresponding field in *CounterPoint SQL* when you transfer records from ***The Raiser's Edge*** into *CounterPoint SQL*. A ***Raiser's Edge*** field with no corresponding *CounterPoint SQL* field indicates that a new field is added to the *CounterPoint SQL* database.

Raiser's Edge Field	CounterPoint SQL Field
System Record ID, Constituent ID, or Import ID	Customer #
First name	First name
Last name	Last name
Name	Name
Address lines	Address 1
Address lines	Address 2
Address lines	Address 3
City	City
State	State
ZIP	Zip code
Phones	Phone 1

Raiser's Edge Field	CounterPoint SQL Field
Phones	Phone 2
Email	Email 1
Email	Email 2
Fax	Fax 1
Fax	Fax 2
Web address	Web Site URL 1
Web address	Web Site URL 2
Program 1	
Category 1	
Standing 1	
Expires on	
Program 2	
Category 2	
Standing 2	
Expires on	
Program 3	
Category 3	
Standing 3	
Expires on	
Program 4	
Category 4	
Standing 4	
Expires on	
Program 5	
Category 5	
Standing 5	
Expires on	

Create New Constituents in The Raiser's Edge from CounterPoint SQL

This table shows the location of each field in *CounterPoint SQL* and the corresponding field in ***The Raiser's Edge*** when you create new constituent records in ***The Raiser's Edge*** from donations and membership transactions downloaded from *CounterPoint SQL*. To add more information to the constituent record in addition to the information entered in *CounterPoint SQL*, you must open the constituent record in ***The Raiser's Edge***. For more information about entering information on the constituent record, see the *Constituent Data Entry Guide*.

CounterPoint SQL Customer Fields	The Raiser's Edge Constituent Fields
Salutation	Titles
First name	First name
Last name	Last name

CounterPoint SQL Customer Fields	The Raiser's Edge Constituent Fields
Address 1	Address lines
Address 2	Address lines
Address 3	Address lines
City	City
Zip code	ZIP
Phone 1	Phones/Emails/Links
Fax 1	Phones/Emails/Links
Email 1	Phones/Emails/Links

Warning: For more information about **Business Rules** in ***The Raiser's Edge***, see the *Configuration & Security Guide*.

In **Business Rules**, if you selected to automatically generate Constituent IDs when adding records, ***The Raiser's Edge*** assigns the Constituent ID. If you do not select this option, when you create a new ***Raiser's Edge*** constituent from a *CounterPoint SQL* donation or membership transaction, ***The Raiser's Edge*** uses the *CounterPoint SQL* customer number for the Constituent ID. If ***The Raiser's Edge*** is unable to use the *CounterPoint SQL* customer number, you must resolve the error manually.

Step 3: Manage Constituents and Memberships

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

With *CounterPoint SQL* integration, you initially transfer constituents and memberships in ***The Raiser's Edge*** to a customer database in *CounterPoint SQL*. As needed, you send more constituents and update the membership information. However, when you update membership information in *CounterPoint SQL*, you overwrite all existing membership data.

Before you transfer constituent data and membership information, you must connect ***The Raiser's Edge*** database to the *CounterPoint SQL* database and map your funds and memberships in ***The Raiser's Edge*** to product inventory in *CounterPoint SQL*. For more information on configuring the integration, see "Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface" on page 8.

To transfer constituent and membership data to *CounterPoint SQL* and to download donation and membership transactions in ***The Raiser's Edge***, you must select the constituent and membership information to transfer. For information on the options you can select when you transfer constituents to *CounterPoint SQL*, see "Transfer Constituent Data to CounterPoint SQL" on page 16. For information on how to transfer constituent and membership data to *CounterPoint SQL*, see the "Transfer Constituents to CounterPoint SQL Procedure" on page 26. For information on how to update membership and constituent information, see "Update CounterPoint SQL Membership Information" on page 28 and "Update Constituent Information in CounterPoint SQL" on page 31.

Transfer Constituent Data to CounterPoint SQL

To transfer constituent data to *CounterPoint SQL*, from the CounterPoint SQL Integration page, click **Transfer Constituents to CounterPoint SQL**. The Transfer Constituents to CounterPoint SQL screen opens to the General tab.

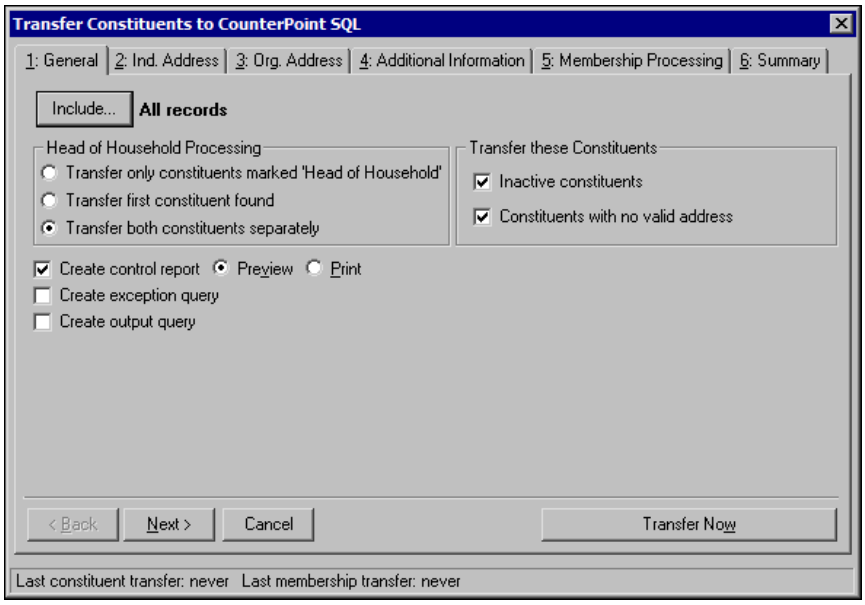
On the Transfer Constituents to CounterPoint SQL screen, you select the records to consider for transfer, determine how constituent data transfers, and view a summary of your transfer criteria. The Transfer Constituents to CounterPoint SQL screen consists of six tabs.

General Tab

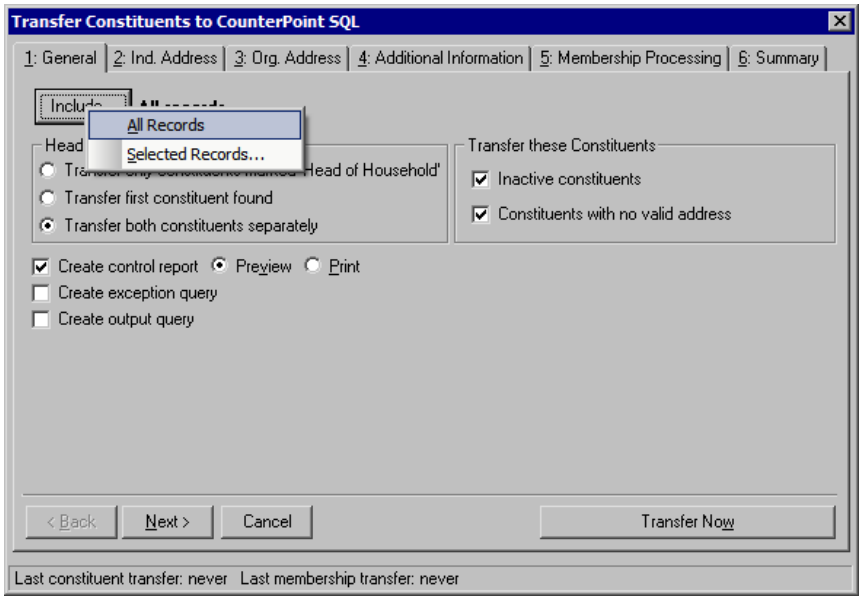
On the General tab, you determine the records to consider for data transfer from ***The Raiser's Edge*** to *CounterPoint SQL*. You can choose to transfer data from all records in your database or from selected records using a query. On this tab, you also define other preferences for the data transfer, such as how to process constituents who are marked as Head of Household, are inactive, or have no valid address.

Select constituent records to transfer

1. On the CounterPoint SQL Integration page, click **Transfer Constituents to CounterPoint SQL**. The Transfer Constituents to CounterPoint SQL screen opens to the General tab.

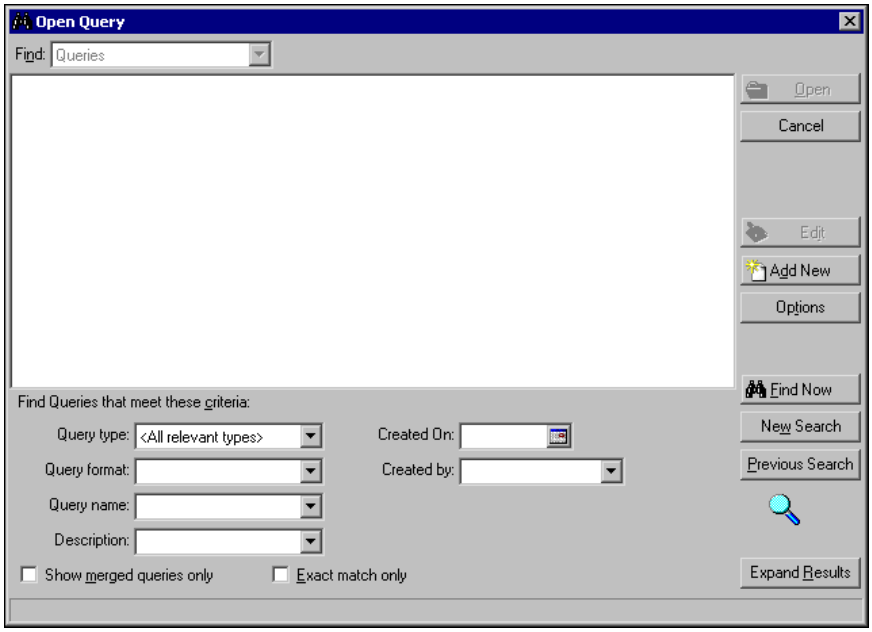


2. To select the group of records to transfer, click **Include**. You can select **All Records** or **Selected Records** (with a query) from your database.



- To include all constituent records in your database, select **All Records**.

- To include only constituents in a selected query, select **Selected Records**. The Open Query screen appears.



Once you make your selection, only those records in the query are considered for transfer. For more information about *Query*, see the *Query and Export Guide*.

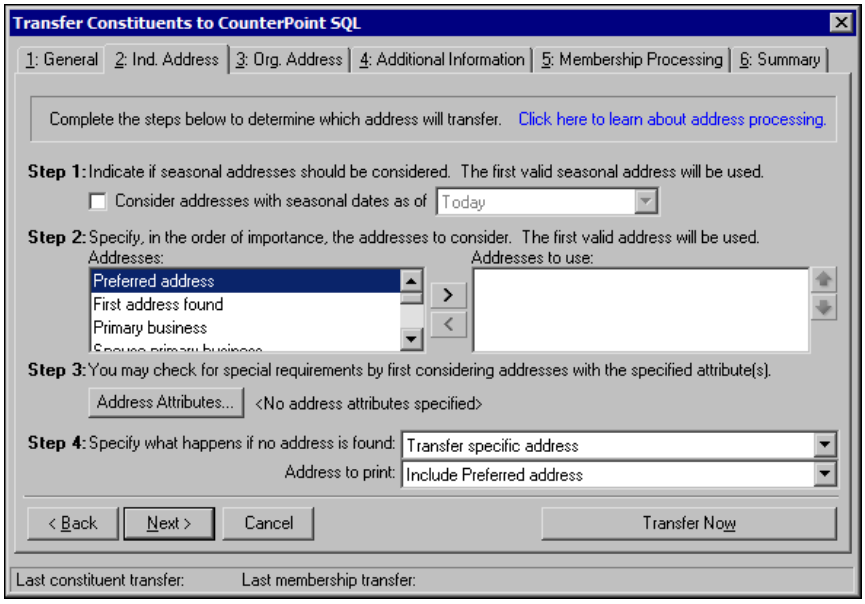
3. In the **Head of Household Processing** frame, select whether to **Transfer only constituents marked 'Head of Household'**, **Transfer first constituent found**, or **Transfer both constituents separately**.
4. In the **Transfer these Constituents** frame, determine whether to include **Inactive constituents** and **Constituents with no valid address**.
5. Select whether to print or preview a control report, create an exception query, or create an output query.
   - To create a control report for the constituent transfer, mark **Create control report**. A control report provides a list of which constituents transferred, the information transferred for each constituent, and any exceptions that occur when transferring information to *CounterPoint SQL*. If you mark **Create control report**, select whether to **Preview** or **Print** the report upon transfer.
   - To create a query of all the records that are not able to transfer, mark **Create exception query**.
   - To create a query of all records that are transferred to *CounterPoint SQL*, mark **Create output query**.
6. Click **Next**. The Ind. Address tab appears. For information about the Ind. Address tab, see "Ind. Address Tab" on page 18.

Ind. Address Tab

On the Ind. Address tab, you determine the address data to transfer from an individual constituent record. ***The Raiser's Edge*** selects an address for each individual constituent using four steps and can consider seasonal addresses, address attributes, and specific address types. When the program is unable to find a valid address for a constituent, you can select an alternate address to use. It is important to indicate your preferences in each of the four steps so the program can choose the best address for each constituent.

- **Select individual constituent address data to transfer**

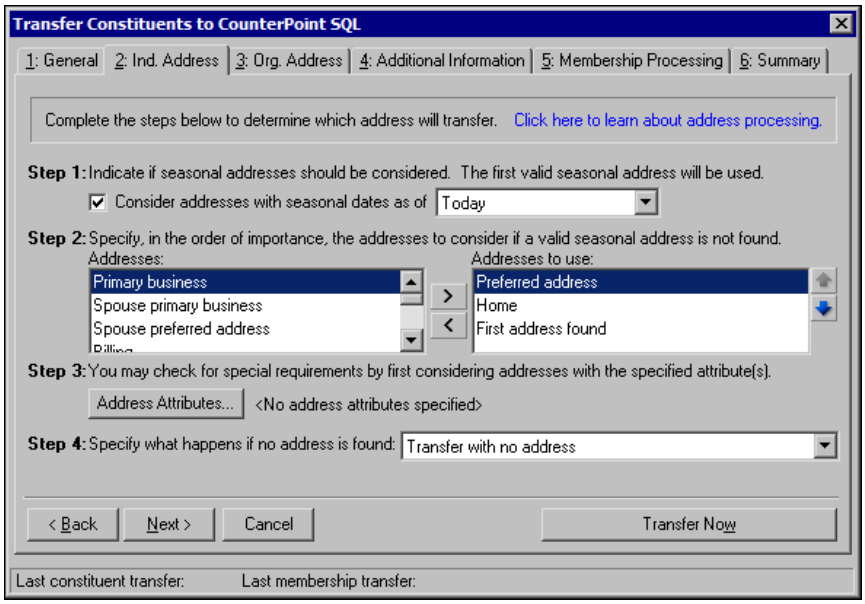
1. On the Transfer Constituents to CounterPoint SQL screen, select the Ind. Address tab.



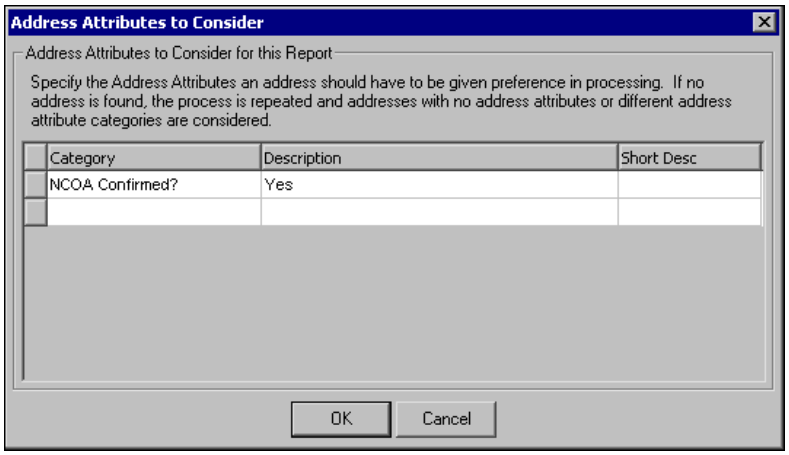
2. In **Step 1**, if seasonal addresses should be considered as eligible addresses for the transfer, mark **Consider addresses with seasonal dates as of**. When you mark this checkbox, you must select a date, such as Today, Yesterday, or <Specific date>, in the corresponding field. When you select <Specific date>, the **Date** field appears for you to enter a date, such as 08/01/2008. For more information about seasonal addresses, see the *Mail Guide*.

Note: The program checks only the address types listed in the **Addresses to use** box. If you want the program to check all address types during address processing, move all available address types from the **Address** box to the **Addresses to use** box.

3. In **Step 2**, specify the addresses to consider when a valid seasonal address is not found in **Step 1** or if you did not consider seasonal addresses for the transfer. To select an address, select the address in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box. If you list multiple addresses in the **Addresses to use** box, sort the addresses in order of their importance. To move an address within the **Addresses to use** box, select the address and click the up or down arrow.



4. In **Step 3**, you can use attributes to choose the address type to transfer. Click the **Address Attributes** button. The Address Attributes to Consider screen appears.



5. You can select an attribute category and description that, if present on an address, give it priority consideration to be used for the transfer. For example, to include addresses with the attribute **Category** of NCOA confirmed? and a **Description** of Yes, enter the information on this screen. For more information about entering address attributes, see the Biographical Information chapter of the *Constituent Data Entry Guide*.
6. After you enter the necessary address attributes, click **OK**. A label appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

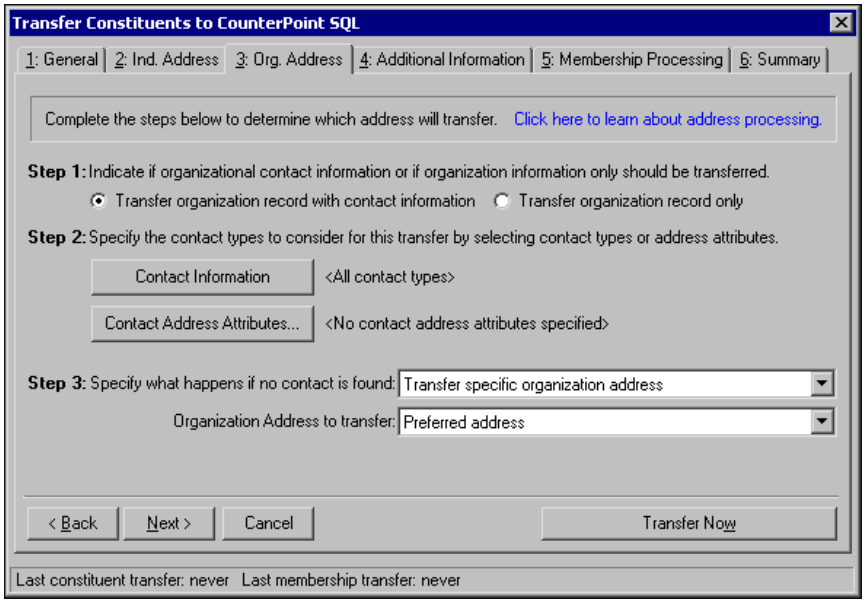
7. In **Step 4**, select the address type the program should use if it cannot find an address meeting your selections in steps 1 through 3. You can Transfer with no address, Remove record from run, or Transfer specific address. If you select "Transfer specific address," the **Address to transfer** field appears so you can select the address type to transfer when no other valid address is found for the constituent. If no valid address has yet been found by this step in processing, the address type selected here prints regardless of selections made in previous steps. For example, the address selected here transfers even if the **Send mail to this address** checkbox is unmarked.
8. Click **Next**. The Org. Address tab opens. For information about the Org. Address tab, see "Org. Address Tab" on page 21.

Org. Address Tab

On the Org. Address tab, you determine the address data to transfer from an organization constituent record. ***The Raiser's Edge*** selects an address for each constituent using three steps and can consider contact information and address attributes. When the program is unable to find a valid contact for a constituent, you can select to remove the record from the transfer. It is important to indicate your preferences in each of the three steps so the program can choose the best address for each organization constituent.

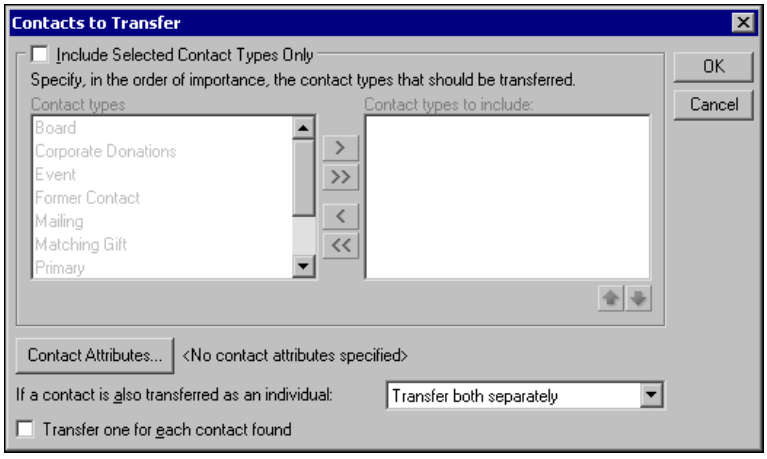
- **Select organization constituent address and contact information data to transfer**

1. On the Transfer Constituents to CounterPoint SQL screen, select the Org. Address tab.

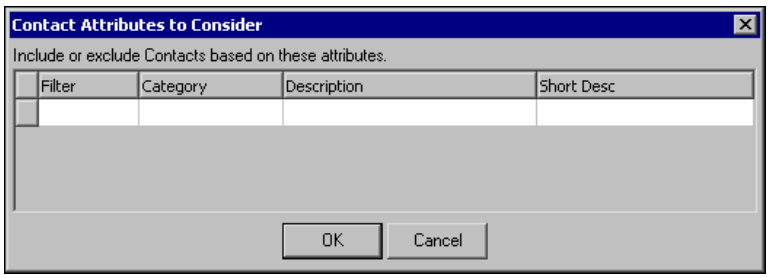


2. In **Step 1**, indicate whether to transfer organization information only or if you want to transfer the organization record with contact information.

3. In **Step 2**, to specify what contact information to transfer for each organization record, click **Contact Information**.

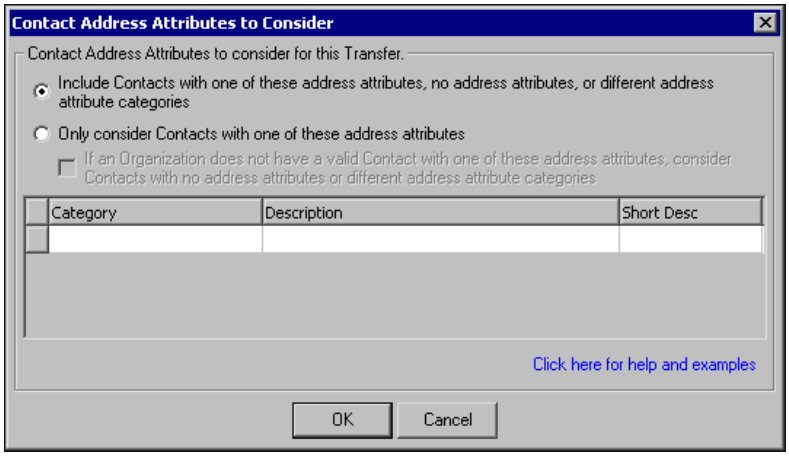


4. To specify which contact types to transfer, mark **Include Selected Contact Types Only**. To select a contact type, select the contact type in the **Contact types** box and click the right arrow to move it to the **Contact types to include** box. If you list multiple contact types in the **Contact types to include** box, sort the contact types in order of their importance. To move a contact type within the **Contact types to include**, select the contact type and click the up or down arrow.
5. To specify whether to include or exclude contacts based on attributes, click **Contact Attributes**. The Contact Attributes to Consider screen appears.



6. You can select an attribute filter, category, and description that, if present on an organization contact, give it priority consideration to be used for the transfer. For example, to include contacts with the attribute **Filter** of Include, a **Category** of Contact As Of, and a **Description** of today's date, enter that information on this screen. For more information about entering contact attributes, see the Biographical Information chapter of the *Constituent Data Entry Guide*.
7. After you enter the necessary contact attributes, click **OK**. A label appears to the right of the **Contact Attributes** button and lists the attributes you selected.
8. In the **If a contact is also transferred as an individual** field, select whether to Transfer both separately, Transfer individual only, or Transfer contact only.
9. To transfer more than one contact's address data, mark **Transfer one for each contact found**. If you do not mark this checkbox, the address data of the first contact that meets the address criteria is transferred.
10. After you enter the necessary contact information, click **OK**. A label appears to the right of the **Contact Information** button and lists the contacts you selected to transfer. When you do not specify any contacts, the label displays <All contact types>.

11. You can use attributes to choose the contact address type to transfer. Click the **Contact Address Attributes** button. The Contact Address Attributes to Consider screen appears.



12. On the Contact Address Attributes to Consider screen, you have various options to choose from to transfer an organization's contacts. Decide how much emphasis to place on contact address attributes in the program's selection of which records to include in the transfer.

    You can search for specific and additional address attributes, search only specific contact address attributes, or search for specific attributes. If no matches for the specified contact address attribute are found on a first pass, the program makes a second pass through the system searching for contacts with additional address attributes,. Your selection may depend on how you enter and use address attributes in your database.

    - If no contact address attributes are specified in the grid, the program uses the information you enter on the Contacts to Transfer screen.
    - If you select an attribute category and description, the program uses it to give priority consideration to be used for the transfer. For example, to include addresses with the attribute **Category** of NCOA confirmed? and a **Description** of Yes, enter the information on this screen. For more information about entering address attributes, see the Biographical Information chapter of the *Constituent Data Entry Guide*.
    - If, on the Contact Address Attributes to Consider screen, you select the **Include Contacts with one of these address attributes, no address attributes, or different address attribute categories** option and enter an attribute, a contact's address with no address attributes and a contact's address contains address attributes of an entirely different category than those specified in the grid are considered for processing. An address contains attributes of the same category but with a different description than those specified in the grid is excluded from the transfer.
    - If, on the Contact Address Attributes to Consider screen, you select the **Only consider Contacts with one of these address attributes** option and enter an attribute, the program only transfers contacts that meet the attribute criteria.
    - If, on the Contact Address Attributes to Consider screen, you select the **Only consider Contacts with one of these address attributes** option, mark the **If an Organization does not have a valid Contact with one of these address attributes, consider Contacts with no address attributes or different address attribute categories** checkbox, and enter an attribute, the program considers contacts with no address attributes and those with different address attribute categories when determining which contacts to transfer.

13. After you enter the necessary address attributes, click **OK**. A label appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

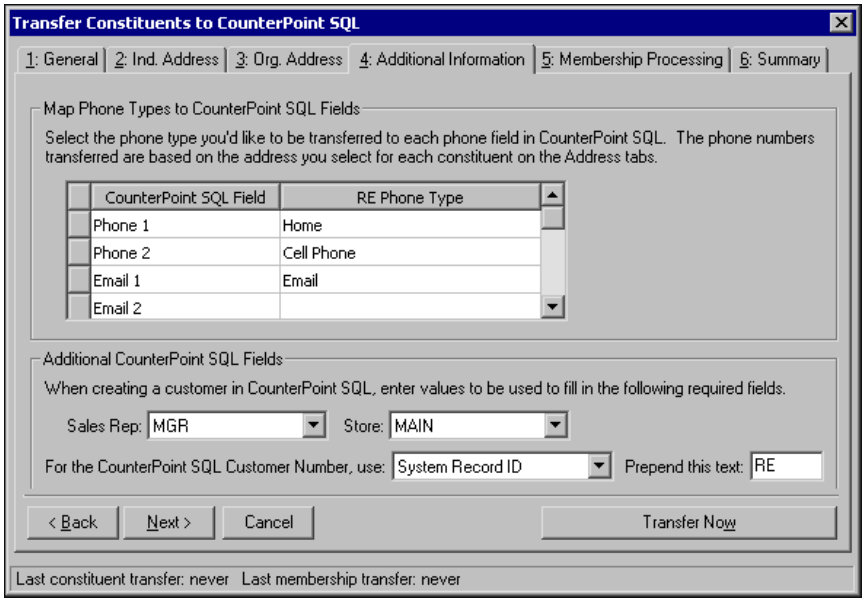
14. In **Step 3**, select the address type the program should use if it cannot find an address meeting your selections in steps 1 through 3. You can Remove record from run or Transfer specific organization address. If you select "Transfer specific organization address," the **Organization Address to transfer** field appears so you can select the address type to transfer when no other valid address is found for the constituent. If no valid address has yet been found by this step in processing, the address type selected here prints regardless of selections made in previous steps. For example, the address selected here transfers even if the **Send mail to this address** checkbox is unmarked.
15. Click **Next**. The Additional Information tab appears. For more information about the Additional Info tab, see "Additional Information Tab" on page 24.

Additional Information Tab

On the Additional Information tab, you specify how to transfer each phone type in ***The Raiser's Edge*** to phone fields in *CounterPoint SQL*. You also select which *CounterPoint SQL* sales representative and store to use when you create new customer records and whether the customer record should use ***The Raiser's Edge*** System Record ID, Constituent ID, or Import ID.

- **Set CounterPoint SQL information for transfer**

1. On the Transfer Constituents to CounterPoint SQL screen, select the Additional Information tab.



2. For every **CounterPoint SQL Field** you need, select an **RE Phone Type**. For example, if your organization uses only one phone number and one email address for each constituent, enter a ***Raiser's Edge*** phone type for Phone 1 and Email 1 only. The phone types available to map for the **RE Phone Type** column are based on the address you chose for your constituents on the Ind. Address and Org. Address tabs.
3. In the **Additional CounterPoint SQL Fields** frame, select the sales representative, store, customer number, and, if you choose, text to prepend the customer number in *CounterPoint SQL* when new customers are created.
    a. In the **Sales Rep** and **Store** fields, select a **Sales Rep** and **Store** for new *CounterPoint SQL* customer records. The selections available are determined by your setup in *CounterPoint SQL*.
    b. In the **For the CounterPoint SQL Customer Number, use** field, select System Record ID, Constituent ID, or Import ID.
    c. To prepend your customer numbers in *CounterPoint SQL*, such as to distinguish ***Raiser's Edge*** linked records from nonlinked records, in the **Prepend this text** field enter up to five alpha-numeric characters.

4. Click **Next**. The Membership Processing tab opens. For more information about the Membership Processing tab, see "Membership Processing Tab" on page 25.

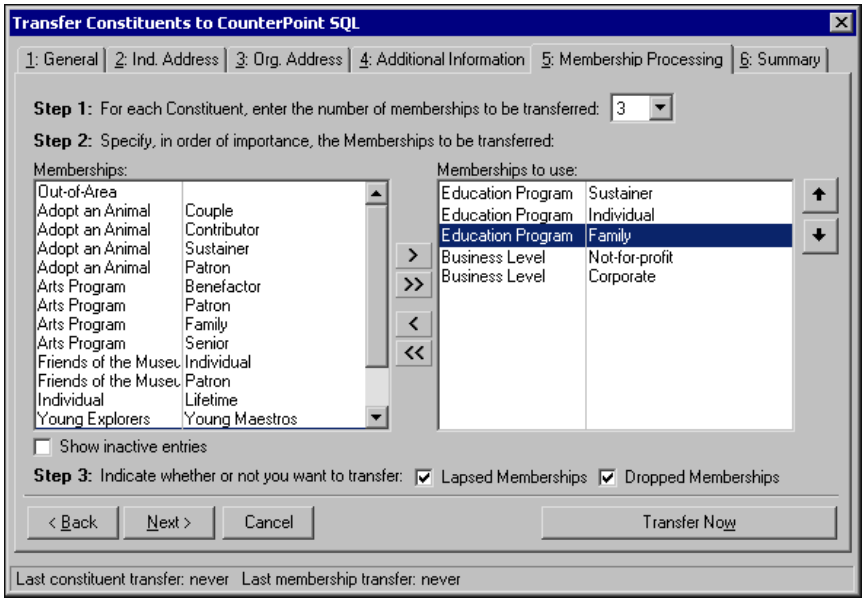
Membership Processing Tab

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

On the Membership Processing tab, you determine how memberships are processed for constituents transferring to *CounterPoint SQL*. You select how many memberships to transfer for each constituent, which memberships to use, and whether to transfer lapsed and dropped memberships.

Select constituent membership data to transfer

1. On the Transfer Constituents to CounterPoint SQL screen, select the Membership Processing tab.



2. In **Step 1**, select the number of memberships that transfer for each constituent You can select to transfer up to five memberships per constituent.

Warning: It is important to specify the order of importance for membership processing. You can include as many memberships as you need, but only the number specified in **Step 1** transfer for each constituent. Therefore, if your constituent has five memberships and you select to transfer two, ***The Raiser's Edge*** determines which two transfer based on the order of importance you specify in the **Memberships to use** box.

3. In **Step 2**, specify the memberships to consider when transferring constituents. If the constituent has any of the memberships selected in the **Memberships to Use** box, the membership information appears in the *CounterPoint SQL* customer record. If the constituent does not have any of the memberships selected, no membership information is transferred. To select a membership, select the membership in the **Memberships** box and click the right arrow to move it to the **Memberships to use** box.

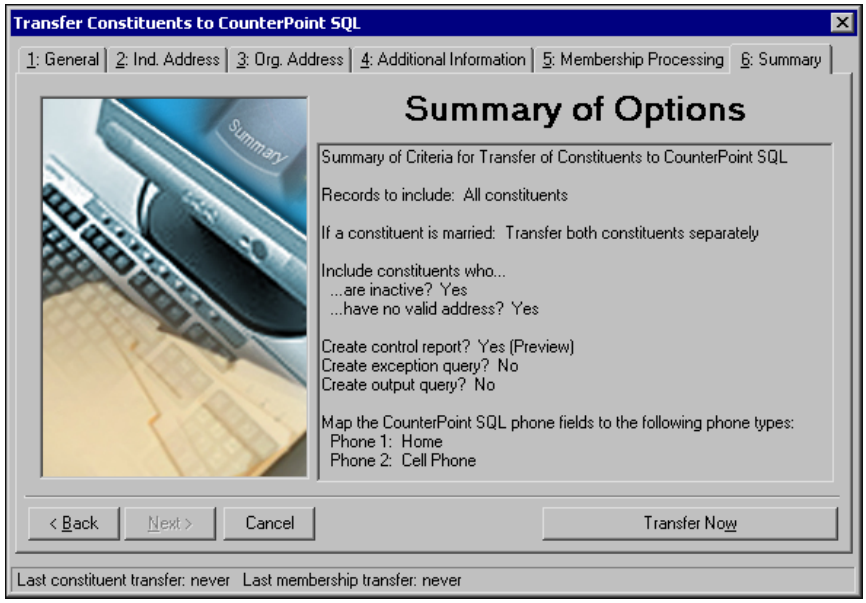
   If you list multiple memberships in the **Memberships to use** box, you must sort the memberships in order of their importance. To move a membership within the **Memberships to use** box, select the membership and click the up or down arrow.

4. To include inactive memberships in the **Memberships** box, mark the **Show inactive entries** checkbox.
5. In **Step 3**, to specify whether to transfer constituent memberships if they are lapsed or dropped, mark the **Lapsed Memberships** or **Dropped Memberships** checkbox.

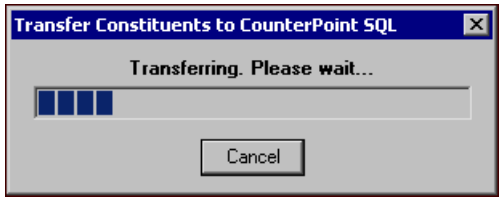
6. Click **Next**. The Summary tab opens. For more information on the summary tab, see “Summary Tab” on page 26.

Summary Tab

The Summary tab displays all the options you chose on the tabs of the Transfer Constituents to CounterPoint SQL screen. To view the summary before you transfer ***Raiser's Edge*** constituents to *CounterPoint SQL*, select the Summary tab.



When you are ready to transfer, click **Transfer Now**. A Transfer Constituents to CounterPoint SQL message appears displaying the transfer progress.



When the transfer finishes, you return to the CounterPoint SQL Integration page unless you chose to preview the control report on the General tab.

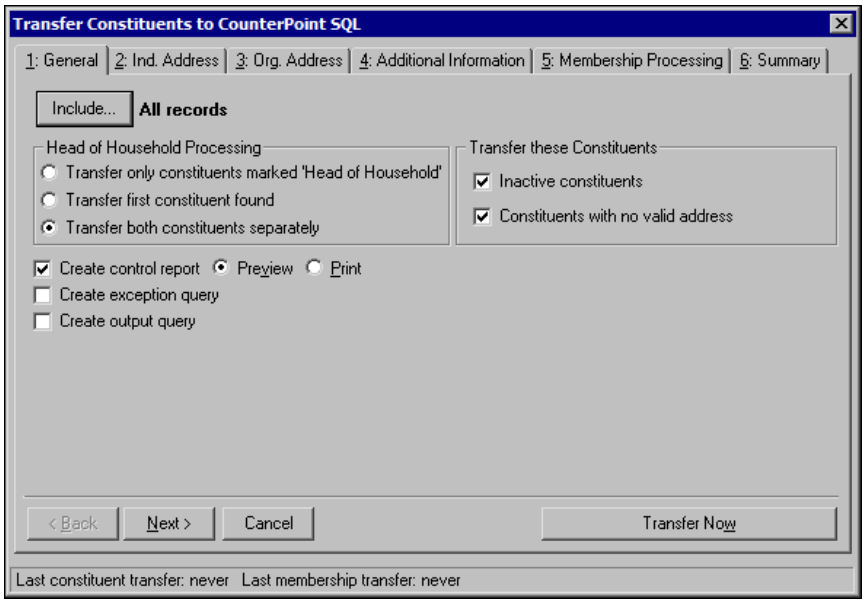
Transfer Constituents to CounterPoint SQL Procedure

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

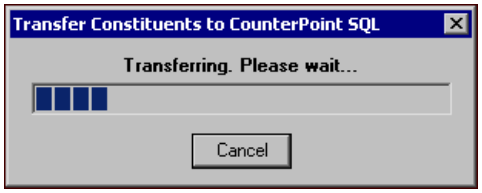
On the CounterPoint SQL Integration page, you transfer constituent and membership information in ***The Raiser's Edge*** to *CounterPoint SQL* to prepare for product sales. This enables you to take donations and sell memberships in *CounterPoint SQL* and then download these transactions back into ***The Raiser's Edge***.

Transfer constituents to CounterPoint SQL

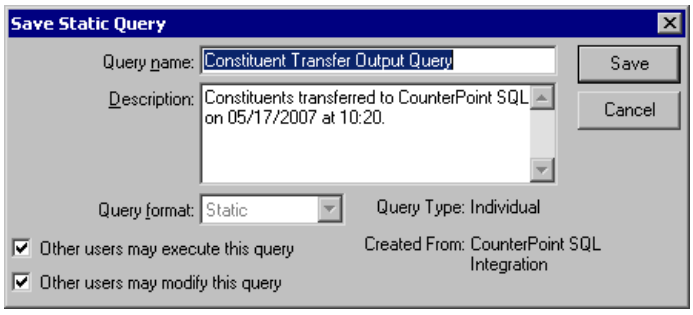
1. On the CounterPoint SQL Integration page, click **Transfer Constituents to CounterPoint SQL**. The Transfer Constituents to CounterPoint SQL screen appears.



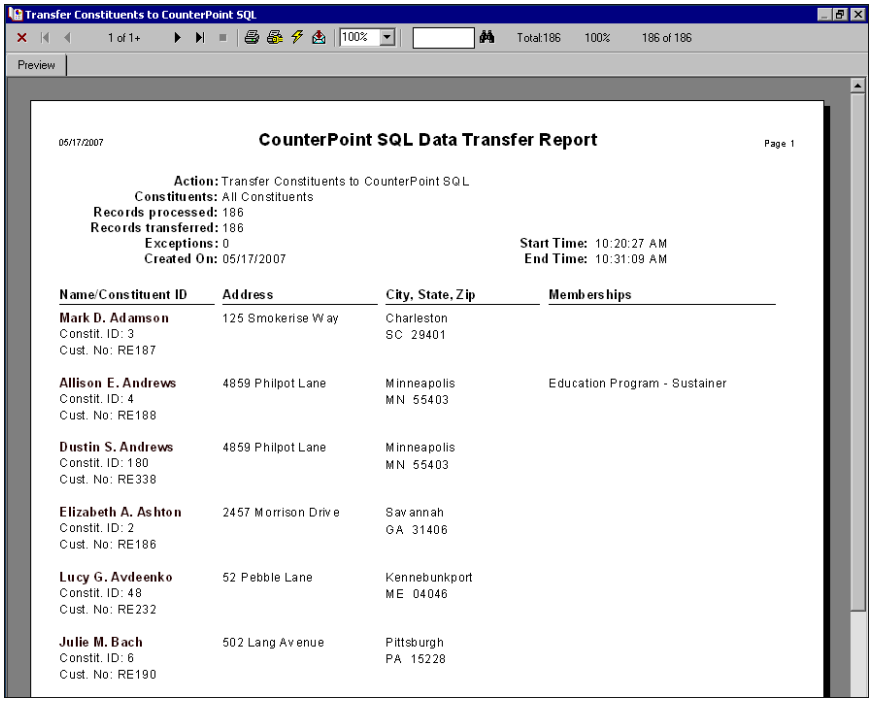
2. On the General, Ind. Address, Org. Address, Additional Information, and Membership Processing tabs of the Transfer Constituents to CounterPoint SQL screen, select the constituent records to transfer and determine how the data transfers. For more information about the Transfer to Constituents to CounterPoint SQL screen, see "Transfer Constituent Data to CounterPoint SQL" on page 16.
3. Select the Summary tab.
4. In the **Summary of Options** box, verify the criteria selected is correct. For more information about the Summary tab, see "Summary Tab" on page 26.
5. Click **Transfer Now**. A Transfer Constituents to CounterPoint SQL message appears displaying your transfer progress.



6. If, on the General tab, you select **Create output query**, the Save Static Query screen appears. In the **Query name** and **Description** fields, enter a name and description to help identify the query. Select whether **Other users may execute this query** or whether **Other users may modify this query** and click **Save**.



7. If, on the General tab, you select **Create control report**, the control report appears and lists the constituent records transferred to *CounterPoint SQL*.



To close the control report and return to the CounterPoint SQL Integration page, click the red “X” in the upper left hand corner.

Repeat this procedure each time you need to transfer constituents from ***The Raiser’s Edge*** to *CounterPoint SQL*.

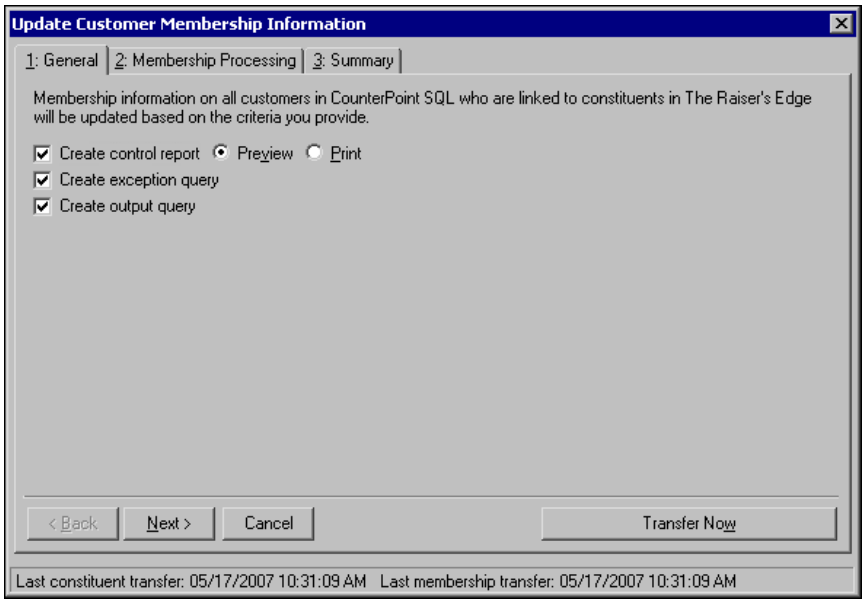
Update CounterPoint SQL Membership Information

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

On the CounterPoint SQL Integration page, you can click the **Update Membership Information in CounterPoint SQL** link to update all ***Raiser’s Edge*** constituent memberships linked to *CounterPoint SQL* customer records. Updating membership information in *CounterPoint SQL* overwrites all existing membership record data. Update memberships only if you are prepared to update all of your records.

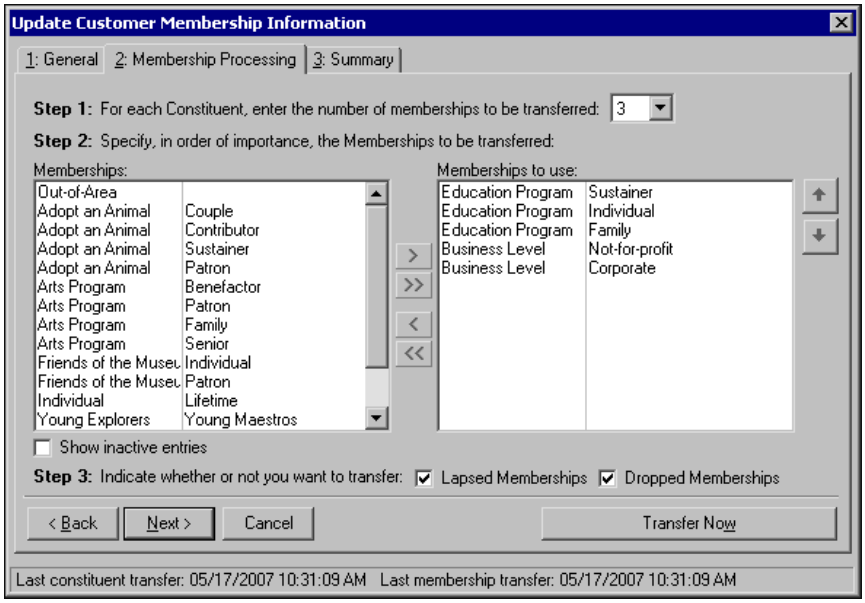
Update CounterPoint SQL membership information

1. On the CounterPoint SQL Integration page, click **Update Membership Information in CounterPoint SQL**. The Update Customer Membership Information screen appears.



2. On the General tab, you can print or preview a control report, create an exception query, and create an output query.
   - To create a control report for the constituent transfer, mark the **Create control report** checkbox. A control report summarizes the transfer's characteristics and field criteria. If you mark the **Create control report** checkbox, select whether to **Preview** or **Print** the report upon transfer.
   - To create a query of all the records that are not able to transfer, mark the **Create exception query** checkbox.
   - To create a query of all records that transfer to *CounterPoint SQL*, mark the **Create output query** checkbox.

3. Click **Next**. On the Membership Processing tab in **Step 1**, you can select to transfer up to five memberships for each constituent.



Warning: It is important to specify the order of importance for membership processing. You can include as many memberships as you need, but only the number specified in **Step 1** transfers for each constituent. Therefore, if your constituent has five memberships and you select to transfer two, ***The Raiser's Edge*** determines which two to transfer based on the order of importance you specify in the **Memberships to use** box.

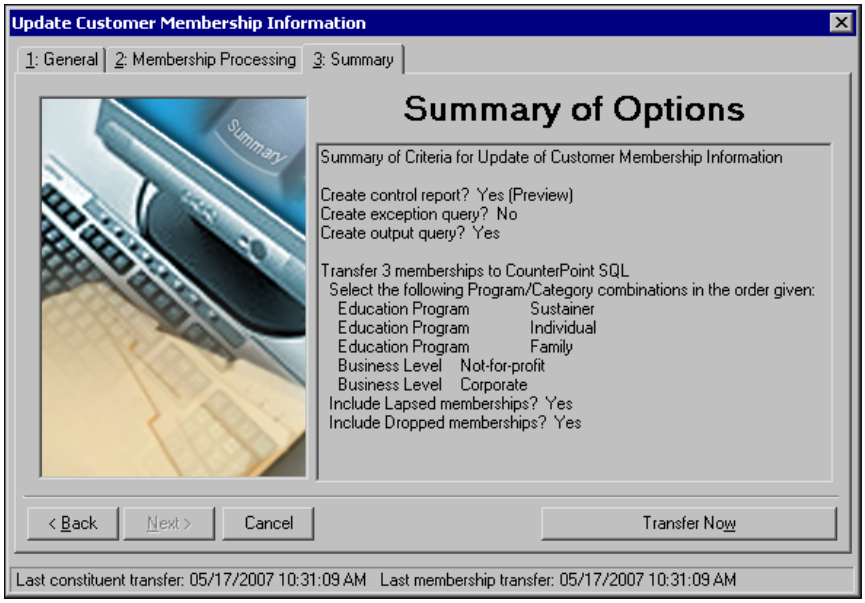
4. In **Step 2**, specify the memberships to consider when updating membership information. If the constituent has any memberships you select in the **Memberships to Use** box, the membership information appears in the *CounterPoint SQL* customer record. If the constituent does not have any membership information based on your selection in the **Memberships to Use** box, no membership information transfers. To select a membership, select it in the **Memberships** box and click the right arrow to move it to the **Memberships to use** box.

   If you list multiple memberships in the **Memberships to use** box, you must sort the memberships in order of importance. To move a membership within the **Memberships to use** box, select the membership and click the up or down arrow.

5. To include inactive memberships in the **Memberships** box, mark **Show inactive entries**.

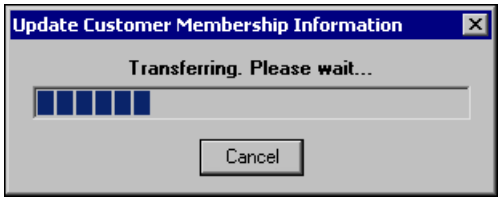
6. In **Step 3**, to specify whether to transfer constituent memberships if they are lapsed or dropped, mark the **Lapsed Memberships** or **Dropped Memberships** checkbox.

7. Click **Next**. The Summary tab displays all options you chose on the General and Membership Processing tabs.



8. When you are ready to transfer, click **Transfer Now**. A ***Raiser's Edge*** message appears warning that you are about to overwrite all existing membership data in *CounterPoint SQL*.

9. To send updated membership information to *CounterPoint SQL*, click **Yes**. An Update Customer Membership Information screen appears displaying the transfer progress.



When the transfer finishes, you return to the CounterPoint SQL Integration page unless you chose to preview the control report on the General tab.

Update Constituent Information in CounterPoint SQL

The integration of ***The Raiser's Edge*** and *CounterPoint SQL* links constituent and customer records. Yuo can transfer constituent and membership information to and download donations and memberships transactions from *CounterPoint SQL*. However, after the initial transfer of constituent records from ***The Raiser's Edge*** to *CounterPoint SQL*, this integration does not share constituent information.

If a constituent record in ***The Raiser's Edge*** is updated but has already transferred to *CounterPoint SQL*, you must manually change the *CounterPoint SQL* customer record.

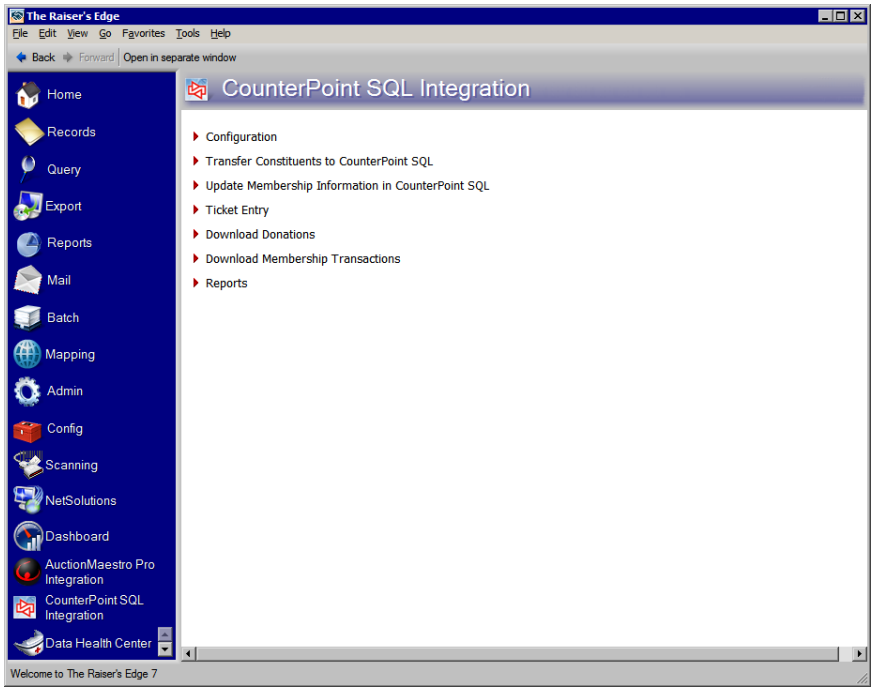
If the customer record in *CounterPoint SQL* is updated, the constituent record in ***The Raiser's Edge*** is not updated when you download donations or membership transactions. We recommend setting up an internal procedure to manually change ***The Raiser's Edge*** constituent record when the *CounterPoint SQL* customer is updated. When new constituents are created in ***The Raiser's Edge*** from new donations or membership transactions, the constituent record contains constituent information entered in *CounterPoint SQL*.

Step 4: Access Ticket Entry from The Raiser's Edge

In ***The Raiser's Edge***, on the CounterPoint SQL Integration page, you can access *CounterPoint SQL*'s Ticket Entry screen. The **Ticket Entry** link enables greater accessibility for entering new products, donations, and membership sales from within ***The Raiser's Edge***.

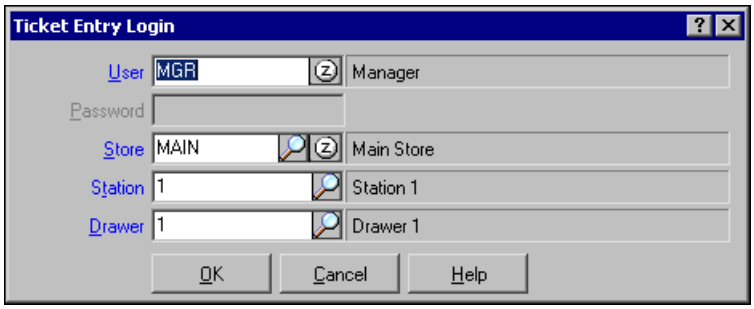
- **Access Ticket Entry**

  1. On the Raiser's Edge bar, click **CounterPoint SQL Integration**. The CounterPoint SQL Integration page appears.



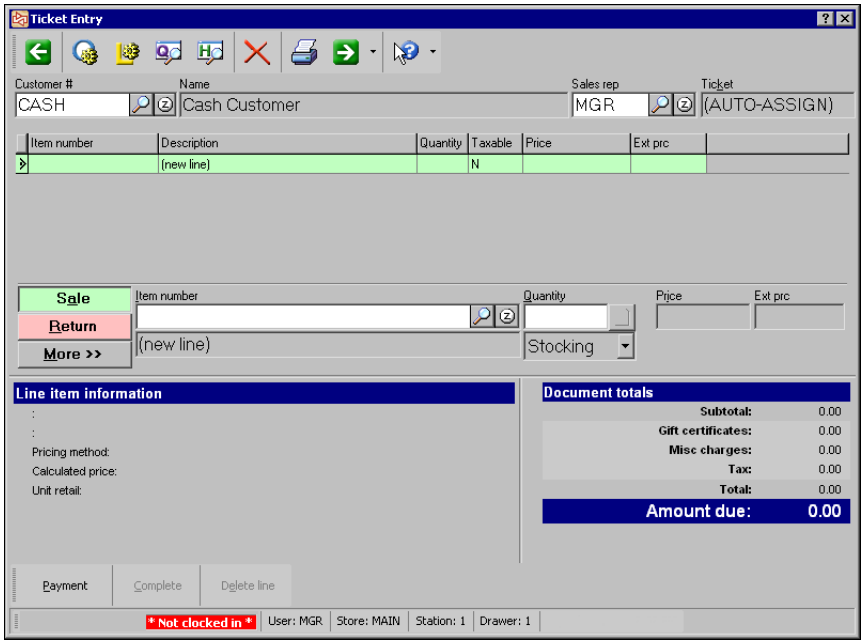
Tip: If you have not entered login credentials in *Configuration*, you are asked to enter your *CounterPoint SQL* login information twice. For more information, see "Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface" on page 8.

2. Click **Ticket Entry**. A Ticket Entry Login screen appears.



Note: Your Ticket Entry screen opens in Standard or Touchscreen mode depending on the option you chose in *Configuration*. For more information, see "Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface" on page 8.

3. Enter your Ticket Entry Login information to open the ticket entry drawer.
4. Click **OK**. The Ticket Entry screen appears. ***The Raiser's Edge*** remains open in the background.

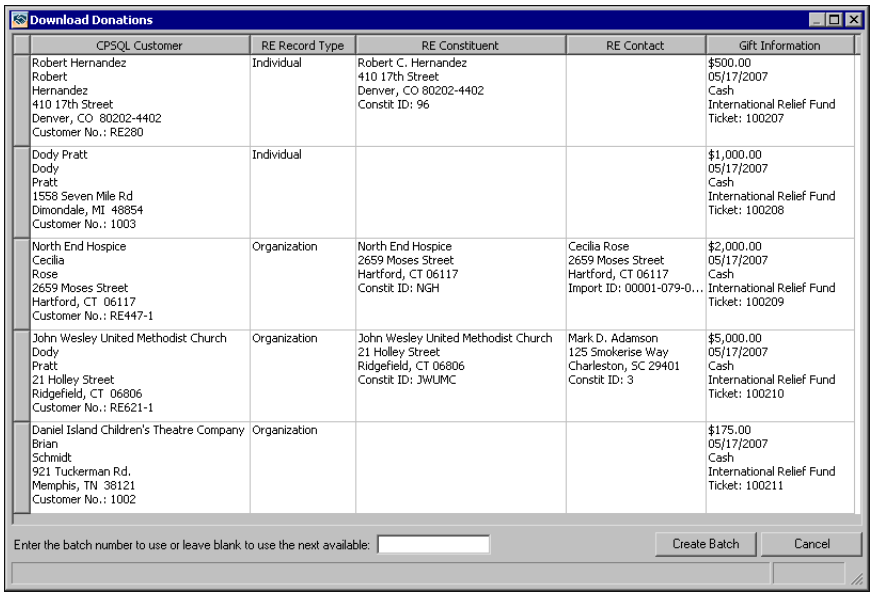


Step 5: Download Donations from CounterPoint SQL

After you map ***Raiser's Edge*** funds and memberships to *CounterPoint SQL* product inventory, you can download donations on the CounterPoint SQL Integration page in ***The Raiser's Edge***. ***The Raiser's Edge*** can download up to 1000 donations at a time. Before you can create and commit a batch, you must link each donation downloaded to a ***Raiser's Edge*** constituent.

Download donations

1. On the CounterPoint SQL Integration page, click **Download Donations**. The Download Donations screen appears.



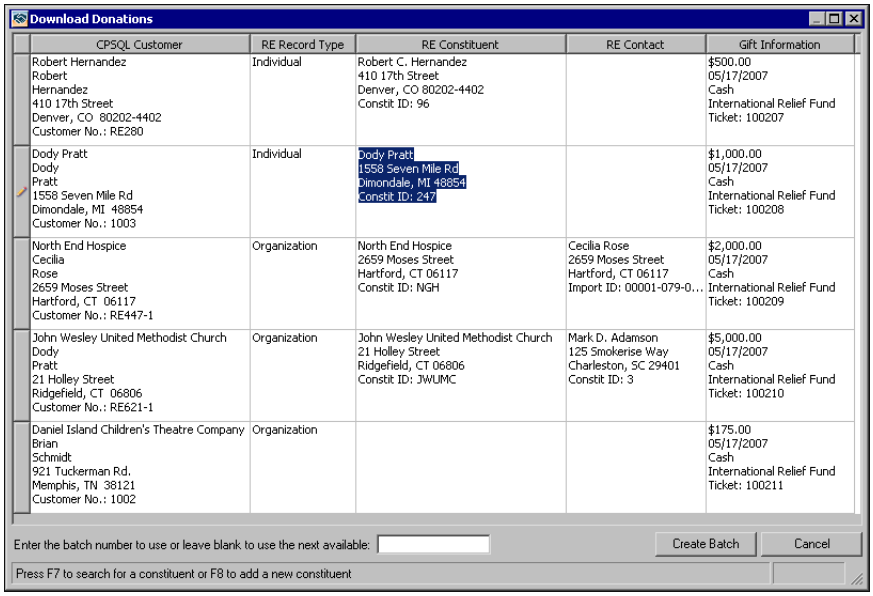
Warning: If you do not see any donations to download, you may not have posted your ticket entries in *CounterPoint SQL*.

2. In the **CPSQL Customer** column, ***The Raiser's Edge*** displays customer record information from *CounterPoint SQL*. ***The Raiser's Edge*** uses information from this column to determine if the customer record is an organization or individual constituent.
3. If the constituent record in ***The Raiser's Edge*** and the customer record in *CounterPoint SQL* are not linked, you can change the constituent record type in the **RE Record Type** column. To change the record type, click the record type of the **CPSQL Customer** to change. A drop-down menu appears for you to change the type.
4. In the **RE Constituent** column, ***Raiser's Edge*** constituent information appears for records already linked to *CounterPoint SQL* customer records. For donations without constituent information in the **RE Constituent** column, link the donation to an existing ***Raiser's Edge*** constituent record or create a new record.

Note: For more information on the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

- To link to an existing record in the **RE Constituent** column, press **F7** on your keyboard. The Open screen appears. Select the constituent record to link to the donation and click **Open**. In the **RE Constituent** column, the constituent record's information you selected appears.

- To create a new ***Raiser's Edge*** constituent record, press **F8** on your keyboard. In the **RE Constituent** column, the constituent record information appears .



Note: For more information about entering data on the constituent record, see the *Constituent Data Entry Guide*.

The Raiser's Edge automatically creates a new constituent record. To add more information to the constituent record in addition to the information entered in *CounterPoint SQL*, open the constituent record.

5. In the **RE Contact** column, ***Raiser's Edge*** contact information appears for organization records already linked to *CounterPoint SQL* customer records. For donations without contact information in the **RE Contact** column, link the donation to an existing ***Raiser's Edge*** contact record or create a new record.

Note: For more information on the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

- To link to an existing record in the **RE Contact** column, press **F7** on your keyboard. The Open screen appears. Select the contact record to link to the donation and click **Open**. In the **RE Contact** column, the contact record's information you chose appears.

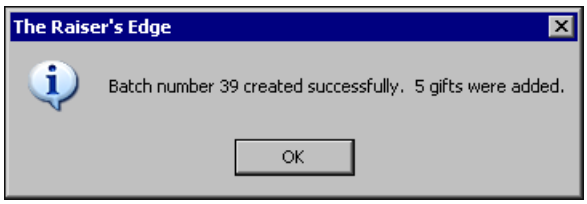
  To create a new ***Raiser's Edge*** constituent record as a contact for the organization record, in the **RE Contact** column, press **F8** on your keyboard. In the **RE Contact** column, the contact information appears. ***The Raiser's Edge*** automatically creates a new constituent record. To add more information to the constituent record in addition to the information entered in *CounterPoint SQL*, open the constituent record.

6. In the **Enter the batch number to use or leave blank to use the next available** field, enter a batch number to assign to the donations. If you leave it blank, ***The Raiser's Edge*** assigns the next available number.

Warning: If you are not ready to create the batch, click **Cancel**. You return to the CounterPoint SQL Integration page in ***The Raiser's Edge***.

7. Once you link all donations to ***Raiser's Edge*** constituents and are ready to create the batch, click **Create Batch**. A Creating Batch message appears displaying the progress.

Once the batch is created, a ***Raiser's Edge*** message appears displaying whether the batch was created successfully, the batch number, and the number of new gifts added.



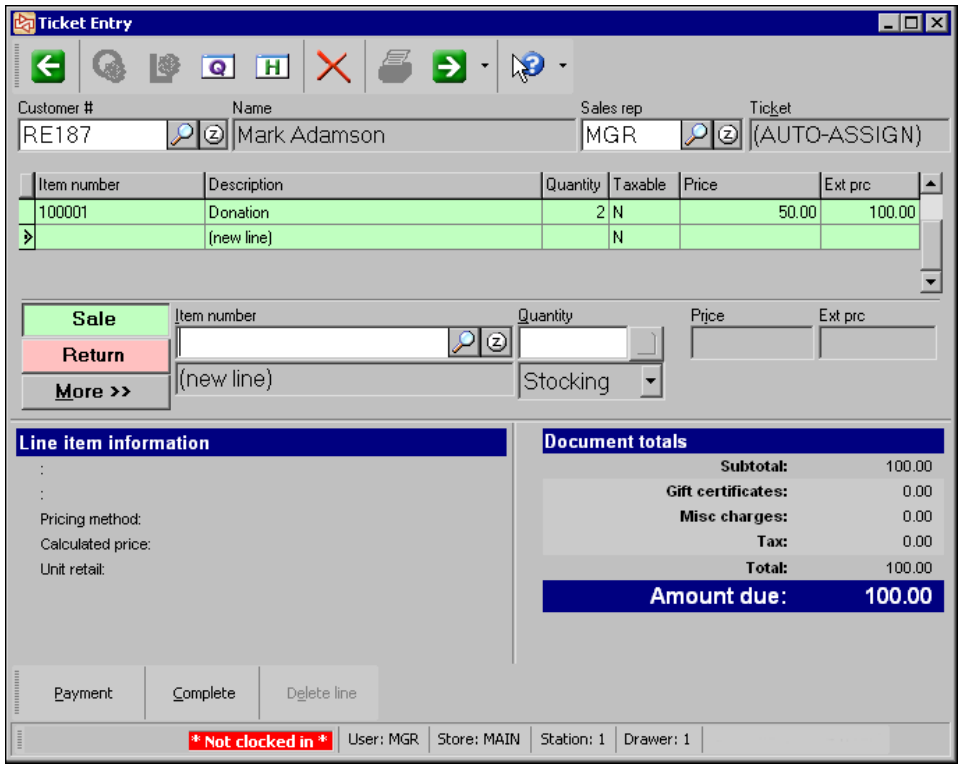
Warning: To commit the gifts in *Batch*, you must have *Batch* security rights. For more information, see the Security chapter of the *Configuration & Security Guide*.

Click **OK**. You return to the CounterPoint SQL Integration page. To complete the download of donations, you must commit the batch to your database. For more information about committing batches, see the *Batch Guide*.

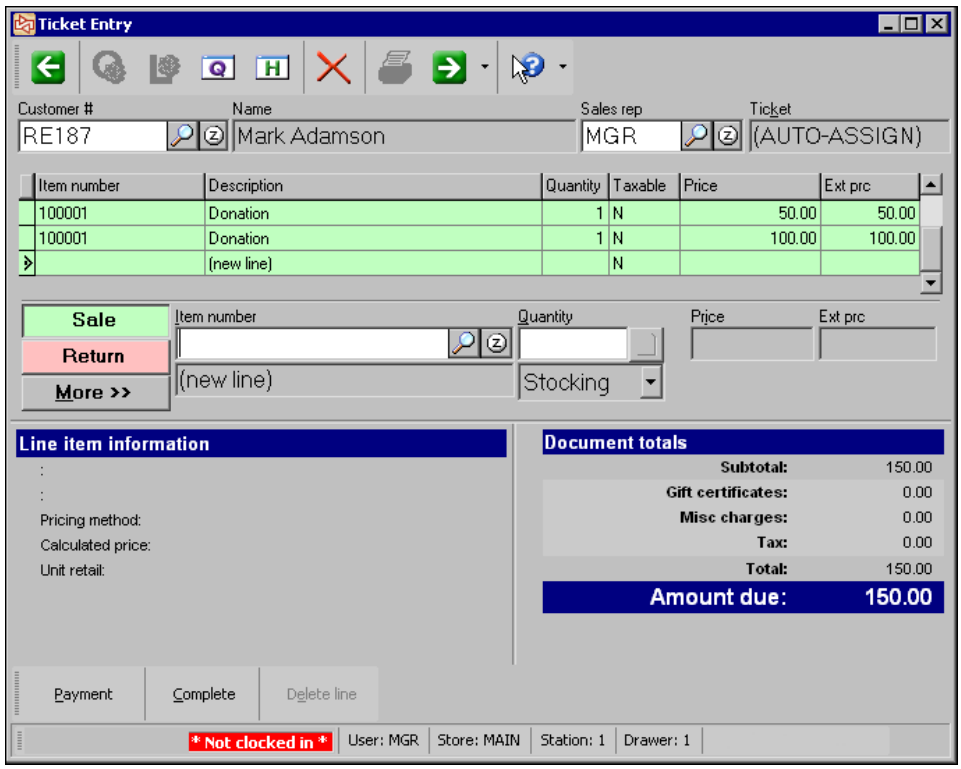
CounterPoint SQL Ticket Items

Warning: To ensure integration functions correctly, read this section carefully.

If a donation is purchased in *CounterPoint SQL* and the quantity for a single line item is greater than one, ***The Raiser's Edge*** **Download Donations** will not create the correct number of gifts.



Instead of creating individual gifts, ***The Raiser's Edge*** creates a total gift for the entire line. We recommend you enter each donation as a separate line item on the ticket.



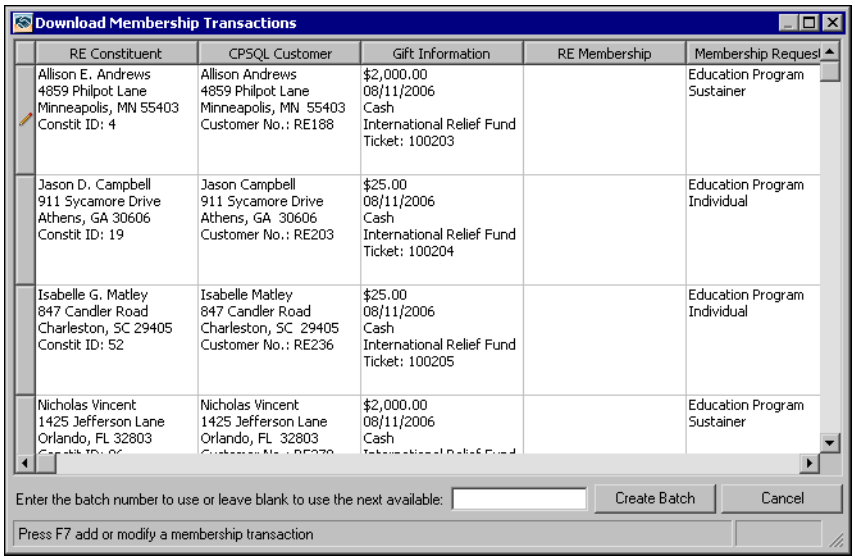
Step 6: Download Membership Transactions from CounterPoint SQL

Warning: For tasks involving memberships, you must have the optional module *Membership Management*.

After you map ***Raiser's Edge*** funds and memberships to *CounterPoint SQL* product inventory, you can download membership transactions on the CounterPoint SQL Integration page in ***The Raiser's Edge***. ***The Raiser's Edge*** can download up to 1000 membership transactions at a time. Before you can create and commit a batch, you must link each membership transaction downloaded to a ***Raiser's Edge*** constituent .

Download membership transactions

1. On the CounterPoint SQL Integration page, click **Download Membership Transactions**. The Download Membership Transactions screen appears.



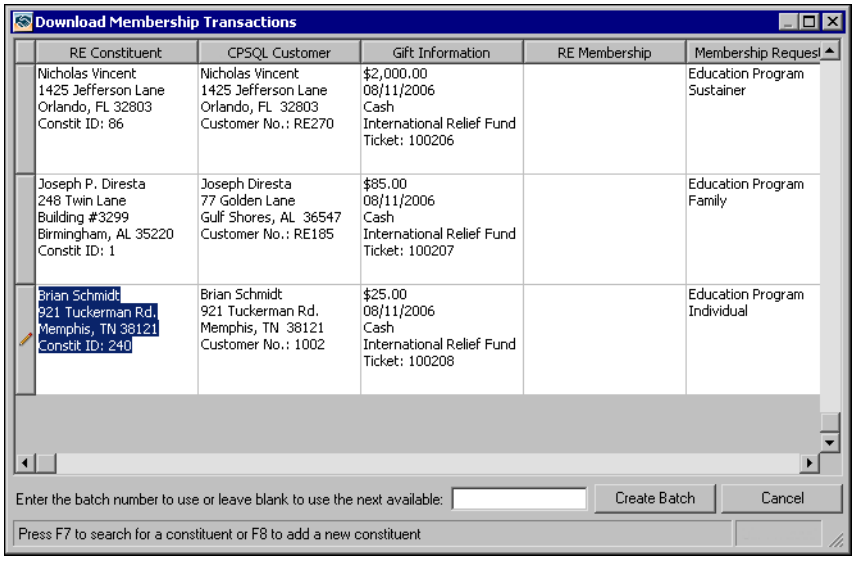
2. In the **RE Constituent** column, ***Raiser's Edge*** constituent information appears for records already linked to *CounterPoint SQL* customer records. For membership transactions without constituent information in the **RE Constituent** column, link the membership transaction to an existing ***Raiser's Edge*** constituent record or create a new record.

Note: For more information about the Open screen, see the Program Basics chapter of the *Program Basics Guide*.

- To link to an existing record in the **RE Constituent** column, press **F7** on your keyboard. The Open screen appears. Select the constituent record to link to the membership transaction and click **Open**. In the **RE Constituent** column, the constituent record's information you chose appears.

Note: For more information about entering data on the constituent record, see the *Constituent Data Entry Guide*.

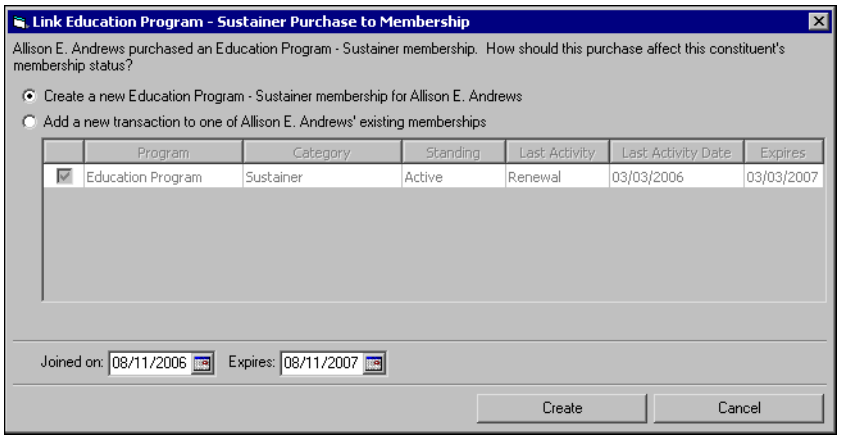
- To create a new ***Raiser's Edge*** constituent record for membership transactions without information in the **RE Constituent** column, press **F8** on your keybaord. In the **RE Constituent** column, constituent record information appears



The Raiser's Edge automatically creates a new constituent record. To add more information to the constituent record in addition to the information entered in *CounterPoint SQL*, open the constituent record.

Warning: To access the Link Purchase to Membership screen, you must have security rights to membership records. For more information, see the Security chapter in the *Configuration & Security Guide*.

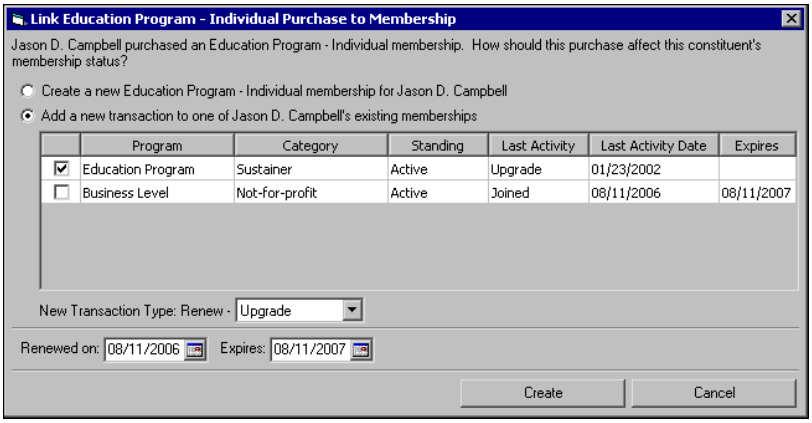
3. In the **RE Membership** column, link the membership transaction to an existing ***Raiser's Edge*** membership record or create a new record. Press **F7**, the Link Purchase to Membership screen appears.



a. To create a new membership for the constituent, select **Create a new [program and category] membership for [constituent name]**. The **Joined on** and **Expires** fields default based on the purchase date. If the dates are not correct, enter new dates.

Note: The **Add a new transaction to one of [constituent name] existing memberships** field is not available to select for constituents with no existing memberships.

b. To link the membership transaction to an existing ***Raiser's Edge*** membership, select **Add a new transaction to one of [constituent name] existing memberships**. All memberships linked to the constituent appear.

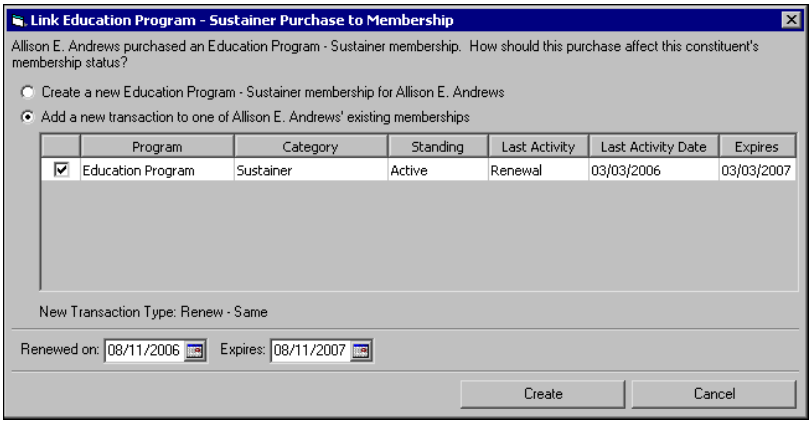


Warning: If, in *Configuration*, **Business Rules**, you select **Do not allow multiple concurrent memberships**, you must add the transaction to an existing membership. For more information, see the *Membership Data Entry Guide*.

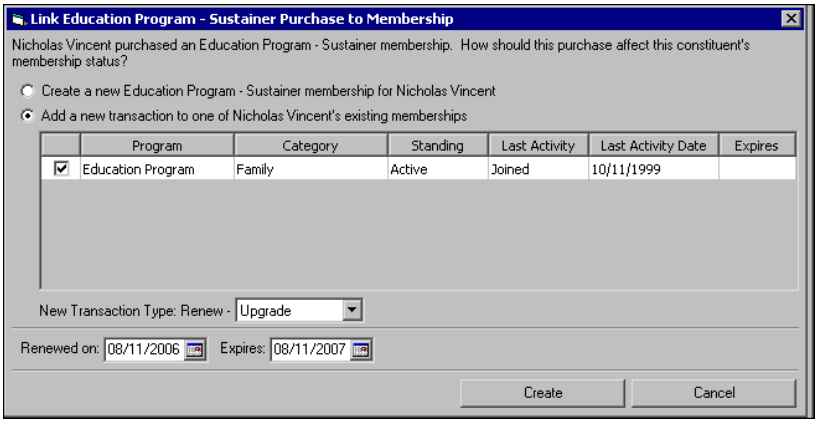
If the constituent has more than one membership available to link to the membership transaction, mark the checkbox in the row of the membership to link to the transaction.

c. In the **New Transaction Type** field, you can select three types of renewal.

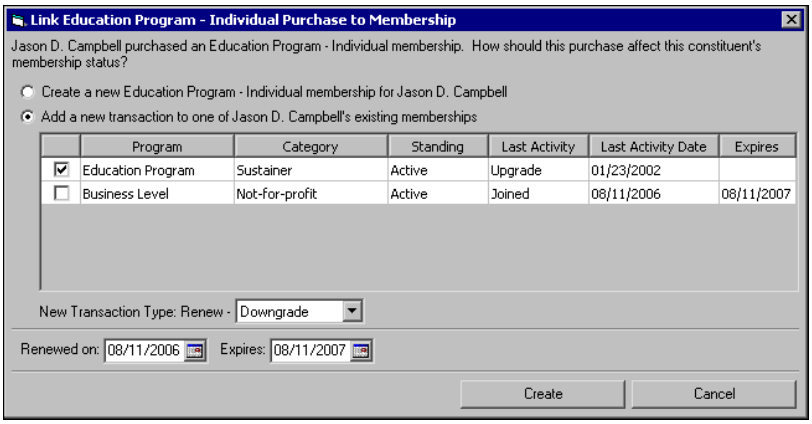
If the membership transaction is the same program and category as the existing membership you link to, the **New Transaction Type** field displays Renew - Same. The **Renewed on** and **Expires** fields default based on the purchase date. If the dates are not correct, enter new dates.



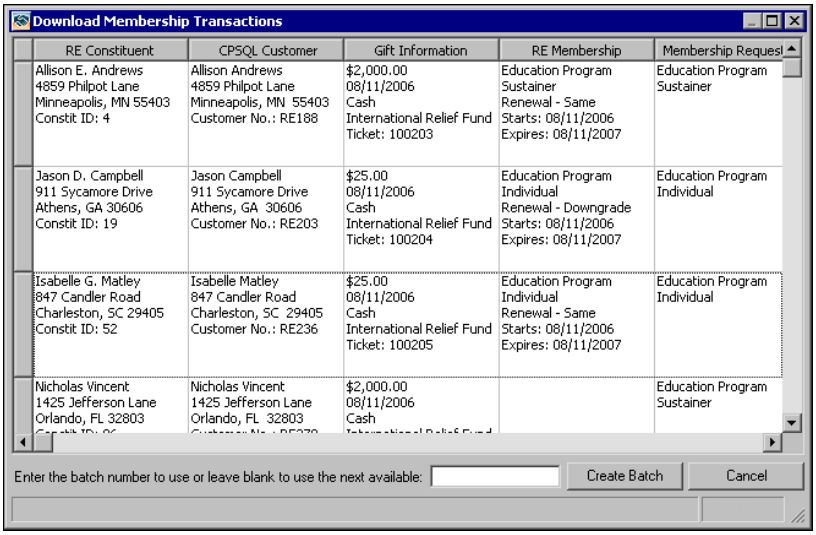
If the membership transaction is an upgrade on an existing membership, in the **New Transaction Type** field, select **Upgrade**. The **Renewed on** and **Expires** fields default to today's date. If the dates are not correct, enter new dates.



If the membership transaction is a downgrade on an existing membership, in the **New Transaction Type** field, select **Downgrade**. The **Renewed on** and **Expires** fields default to today's date. If the dates are not correct, enter new dates.



d. Click **Create**. The membership information now appears in the **RE Membership** column.

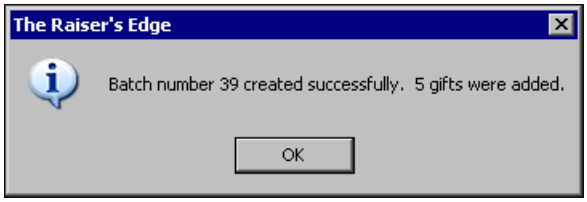


4. In the **Enter the batch number to use or leave blank to use the next available** field, enter a batch number to assign to the membership transactions. If you leave blank this field blank, ***The Raiser's Edge*** automatically assigns the next available number.

Warning: If you are not ready to create the batch, click **Cancel**. You return to the CounterPoint SQL Integration page.

5. To create the batch, click **Create Batch**. A Creating Batch message appears displaying the progress.

Once the batch is created, a ***Raiser's Edge*** message appears displaying whether the batch created successfully, the batch number, and the number of new gifts added.



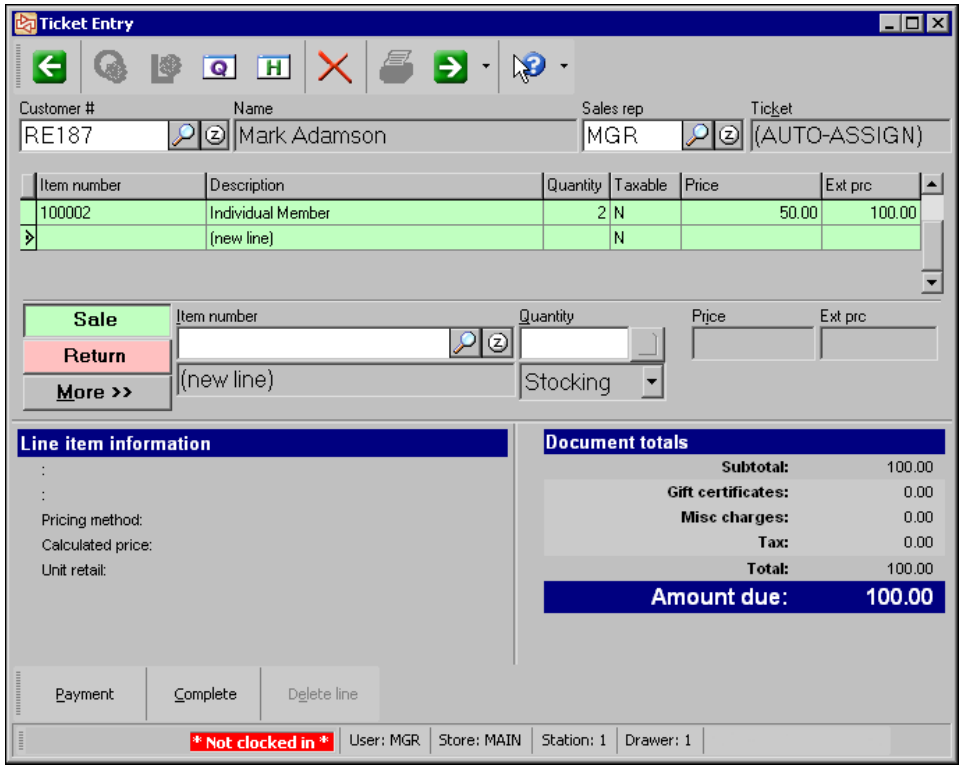
Warning: To commit the gifts in *Batch*, you must have *Batch* security rights. For more information, see the Security chapter of the *Configuration & Security Guide*.

6. Click **OK**. You return to the CounterPoint SQL Integration page.
7. To complete the download of membership transactions, commit the gift batch to your database. For more information on committing batches, see the *Batch Guide*.

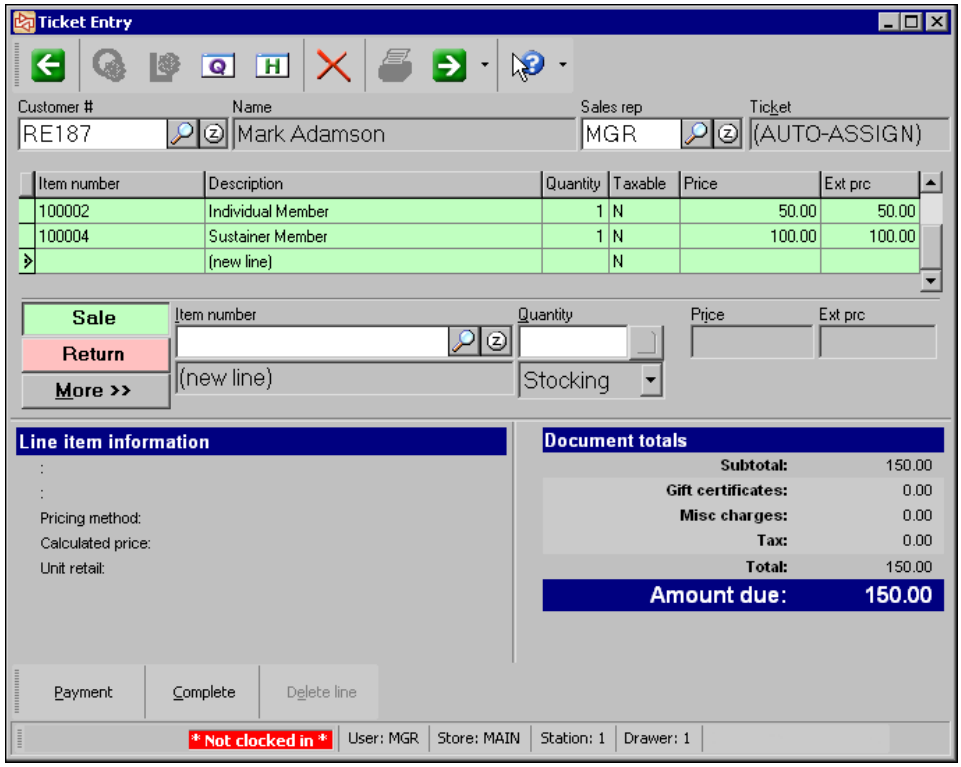
CounterPoint SQL Ticket Items

Warning: To ensure integration functions correctly, read this section carefully.

If a membership transaction is purchased in *CounterPoint SQL* and the quantity for a single line item is greater than one, ***The Raiser's Edge*** **Download Membership Transactions** will not create the correct number of membership transactions.



Instead of creating individual membership transactions, ***The Raiser's Edge*** creates one membership transaction for the total amount of the line. We recommend you enter each membership transaction as a separate line item on the ticket.



Step 7: Access CounterPoint SQL Reports from The Raiser's Edge

Tip: You are asked to enter your *CounterPoint SQL* login information if you have not entered login credentials in *Configuration*. For more information, see "Step 2: Set up The Raiser's Edge and CounterPoint SQL Interface" on page 8.

In ***The Raiser's Edge***, you can directly access 11 *CounterPoint SQL* reports on the CounterPoint SQL Integration page. To open *CounterPoint SQL* for access to all *CounterPoint SQL* reports, click the **Other CounterPoint SQL Reports** link. The following reports are available from the CounterPoint SQL Integration page in ***The Raiser's Edge***:

- Point of Sale : Orders
- Inventory : Items
- Inventory : Inventory History
- Inventory : Six Week Item History
- Inventory : Price Rules
- Inventory : Customer Price List
- Customers : Customers
- Customers : Journals : Cash Receipts
- Sales History : By Customer By Item
- Sales History : By Item By Customer
- Sales History : By Sales Rep

Index

C

constituent
  field map
    create new in ***The Raiser's Edge*** 15
    transfer from ***The Raiser's Edge*** 14
  update 31

D

database
  connect 8
donation
  download from CounterPoint SQL 33
  enter 32
download
  donations from CounterPoint SQL 33
  membership transactions from CounterPoint SQL 38

F

field mapping 14
  constituent
    create new in ***The Raiser's Edge*** 15
    transfer from ***The Raiser's Edge*** 14
funds, map to product inventory 10

I

integration
  benefits 3
  constituents and memberships 16
  how it works 6
  meet the requirements 6
  overview 4
  requirements 4
  security 7
interface, setup 8
inventory, ***see*** product inventory

M

map
  fields 14
  funds to product inventory 10
  memberships to product inventory 10
membership
  download transactions from CounterPoint SQL 38
  map to product inventory 10
  sales, enter 32
  ticket items 42
  update 28

P

product inventory, map funds and memberships 10
product sales, entering 32

R

reports
  access from ***The Raiser's Edge*** 44

S

sales, enter 32
security 7

T

ticket entry
  access from ***The Raiser's Edge*** 32
ticket items
  donations 36
  membership 42
transfer
  field mapping 14
transfer constituent data
  additional information tab 24
  general tab 17
  ind. address tab 18
  membership processing tab 25
  org.address tab 21
  overview 16
  procedure 26
  summary tab 26