

Blackbaud’s Mailwise Service Import Return File

Blackbaud’s **Mailwise Service** is the perfect solution for not-for-profit organisations who want to clean address and phone information on selected constituents. The Mailwise Service checks address information against Postal Address File (PAF), National Change of Address (NCOA) and Electoral-Roll Verification databases. Telephone numbers are checked and verified against the Ex-directory and Telephone Preference Service lists.

Now the screening is complete the cleansed data file should be imported into Raiser’s Edge and includes cleansed addresses, where relevant, along with the attributes that will allow you to identify those records cleaned by the service.

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SERVICES INCLUDED IN THE CLEANSED DATA

The services included in the data file returned by Blackbaud depend on which services were chosen when you decided to proceed with the data cleanse.

Please refer to the Agreement to Purchase (ATP) that you signed and returned to your Account Manager to identify the services.

Also see [What is MailWise](#) for more information on the services available.

CREATE MAILWISE ATTRIBUTES

Please refer to [What Attributes are Required for the MailWise Process](#) for more information on the attributes to be created.

This includes information on all possible attributes used by MailWise and you can decide whether you wish to create all the attributes or only those for the services you have chosen.

It is important that the attributes are created in Raiser's Edge prior to beginning the import process below.

Note: The attributes can be used for further data analysis, and to include/exclude records from future data cleansing services.

DOWNLOAD CLEANSED DATA FROM FTP

For instructions on how to download the cleansed data, please refer to the [Mailwise Data Enrichment Guide](#).

******* IMPORTANT NOTE *******

Please do not open the CSV file in Excel or other application prior to import. This can result in that application applying formatting to the data which results in issues when importing

If you *must* open the file in Excel or other application, to view the file prior to import, then you should unzip the file again prior to import.

IMPORTING YOUR CLEANSED DATA BACK INTO THE RAISER'S EDGE

***** **IMPORTANT** *****

It is your responsibility to make sure your Raiser's Edge database has been backed up properly before importing the new data. If you are not familiar with your organisation's policy on backups you will need to check with your in-house IT personnel.

Please do not open the returned data files in Excel, as this will affect the formatting of the data. If you wish to review the files before they are imported, please use MS Word Notepad.

1. From **The Raiser's Edge** bar, click **Admin**.
2. Click the **Import** link.
3. From the list under the constituent heading, select **Constituent**
4. Use the following screen as a guide to specify the General tab options:

It is recommended that the file is validated prior to running the import process.

Note: The attributes referred to on [Page 3](#) must be added in configuration before the file is validated.

- Update Existing Records
- Create new table entries
- Import file – browse to the file you downloaded
- Use the Import ID
- Delimited – Characters separate the fields

5. The File Layout will be filled out automatically. You can skip this tab.
6. The Fields tab will automatically create a mapping of the fields in the file to be imported to the relevant Raiser's Edge fields. Please review the sample screen shots below, to ensure the mappings are correctly setup in your import. Please pay attention to field names and extensions.

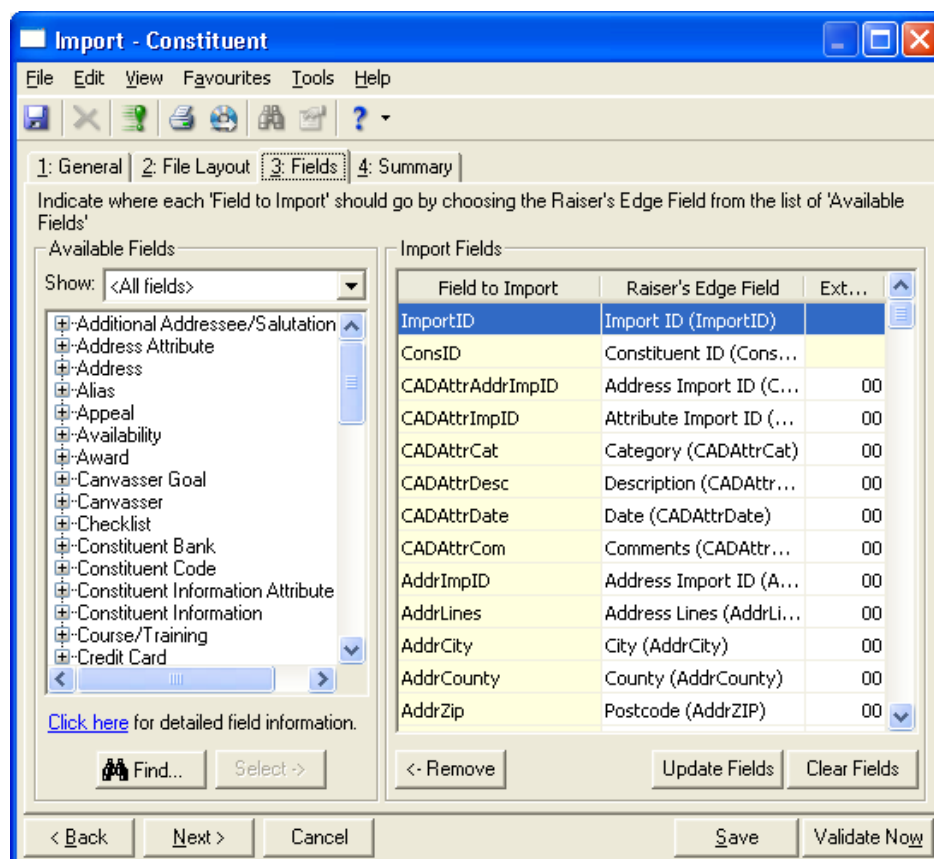
Fields that are mapped with multiple instances are :

Address Attribute Import ID, Address Attribute Category, Address Attribute Description, Address Attribute Date, Address Attribute Comments – see to the list of attributes later in this document for examples of these attributes

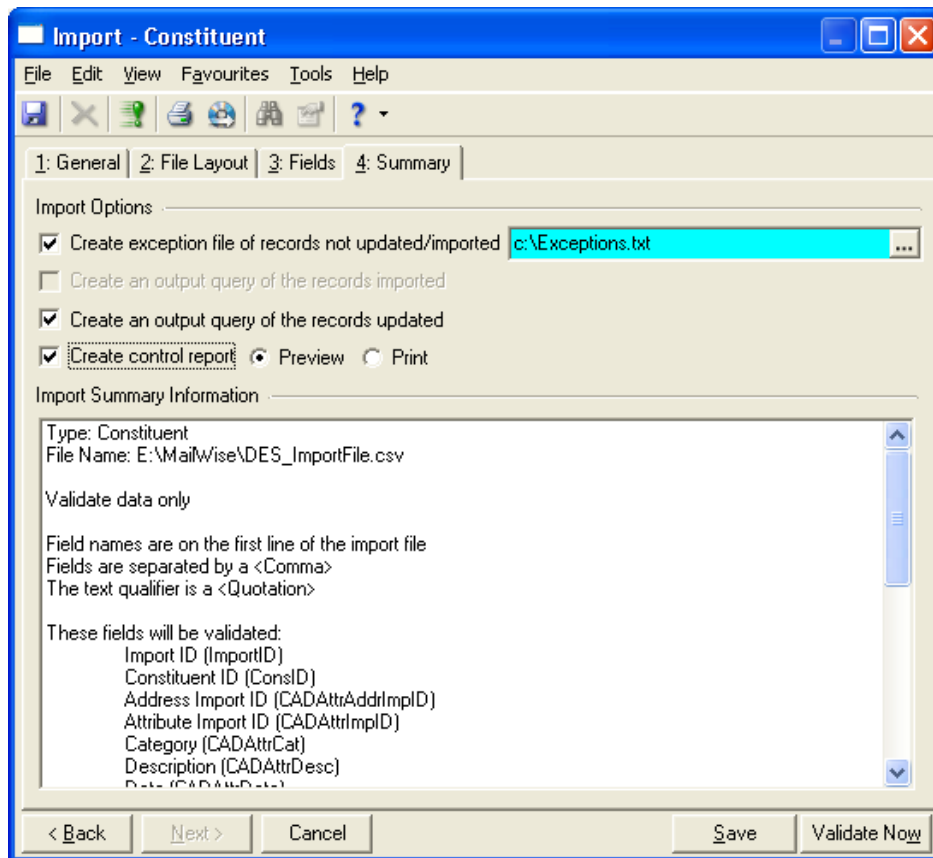
Address Import ID, Address Lines, City, County, Country, Postcode, Address Type, Info Source, Send Mail – information of new address if relevant.

Important – Please scroll through the field list on the Fields tab to ensure all fields in the import file are mapped to Raiser's Edge fields

Example of import Fields tab -



7. Select the Summary tab. Use the following screen as a guide to specify Summary tab options.



- Create exception file of records not updated/imported (name the file “C:\Exceptions.txt”)
- Create control report

You may wish to create a query of the records that have been updated.

8. Click **Validate Now** to validate the Mailwise file prior to import.
9. If you have any exception, please deal with accordingly.

Note: Remember that you can always use our online Knowledgebase to search for answers to any exceptions that occur – <http://kb.blackaud.com>

10. When ready to proceed, remove the tick from the Validate Data only option on the General tab and click **Update Now** to enter the cleansed constituent, address and phone information into the Raiser’s Edge.

Your constituents, addresses and phone numbers have now been updated!

ANALYSE RECORDS UPDATED BY THE MAILWISE RETURN FILE

Documentation on queries that can be created to analyse the results of the data cleansing following the import is available via the following knowledgebase solution.

[Analyse Records Updated by MailWise](#)

This documentation includes screen shots of the attributes created and step by step instructions on how to create the relevant queries. The queries created depend on the MailWise services you have chosen.

If you have any questions about these instructions, please contact your Account Manager or The Support Team on support@blackbaud.co.uk.

Thank you for using our services.