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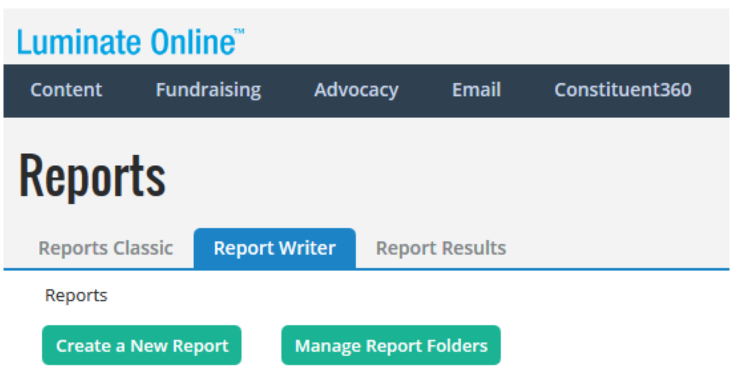
Entering Luminate Online Organization Gifts into Raiser's Edge

In order to move gifts from an organization in Luminate Online to Raiser's Edge it will be a manual process that requires exporting the data out of Luminate and creating a batch for Raiser's Edge. Below we've outlined that process that walks you through both parts of exporting and importing the data.

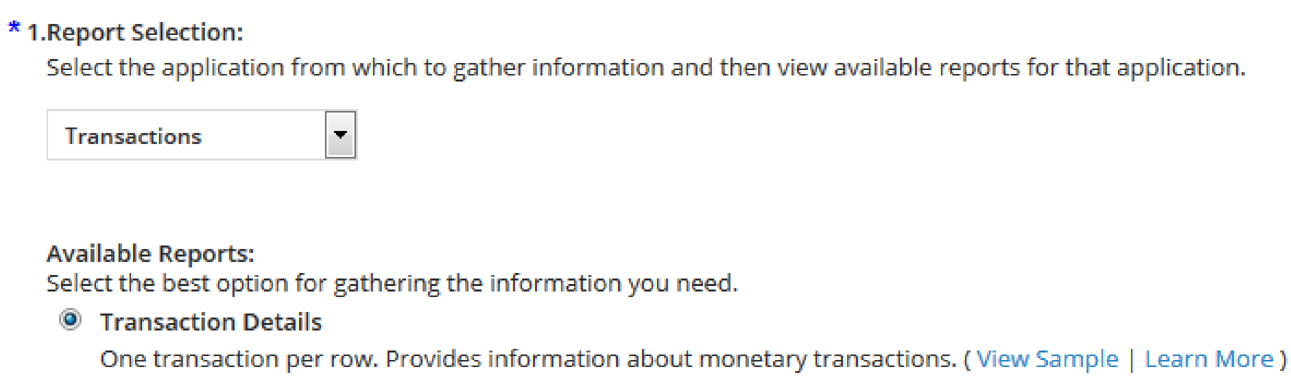
Exporting Data - Luminate

In order to get organization gifts out of Luminate you must run a Transaction Details report in Report Writer to get the necessary data to export out of Luminate.

Login and go to Data Management > Reporting. Then click on the Report Writer tab and select create a new report.



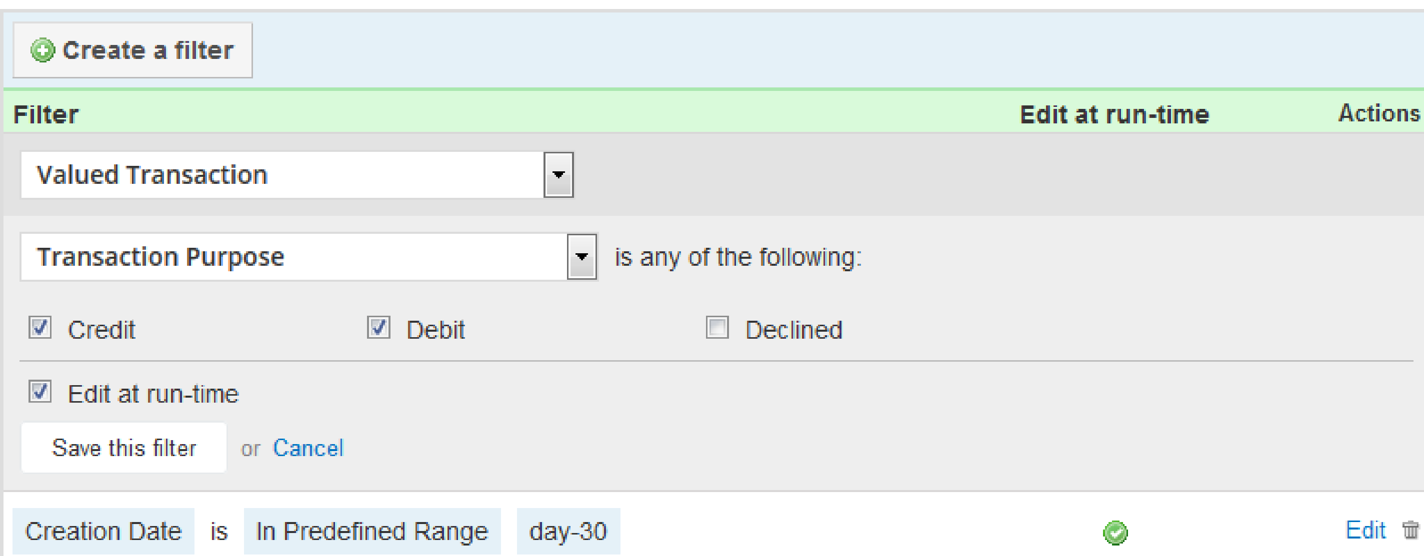
You will then select a Transaction report from the Report Selection dropdown menu and then select Transaction Details from the radio button menu.



Next you will begin the process of assigning which columns of data you wish to export out. Here are the most important data columns to include (you can add more if you wish):

- Organization Display Name
- Organization Address Street 1, Street 2, City, State and Zip Code
- Gift Amount
- (Donation) Campaign Title
- (Donation) Form Title
- (TeamRaiser) Event Name (if applicable)
- Participant Name (if applicable)
- Payment Method
- Original Transacted Valued
- Transaction Date
- Billing First Name
- Billing Last Name

Then you will want to add filters to this report. Make sure you add Transaction Purpose and check off Credit and Debit. Save filter.

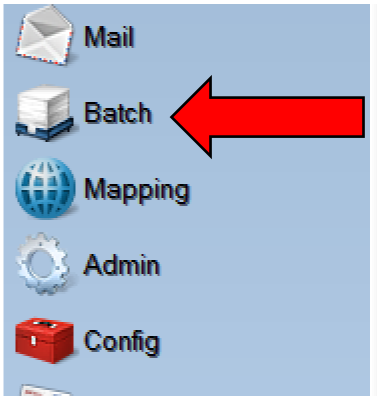


Next, add a date range you want to pull transactions. Defaulted is 30 days. But you can click edit and alter that date range and make it more custom.

Finally add any additional filters – for example you can filter by a specific donation campaign or donation form to get a more selective list of organization gifts instead of everything in the system.

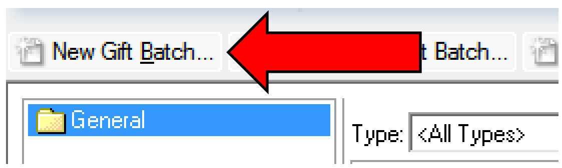
Give the report a name and then save and run report. Once the report is done, you will want to download it by clicking on the download button and export as a CSV. Save this file to your desktop, for you will need it for the next step in this process.

Creating a Batch in Raiser's Edge

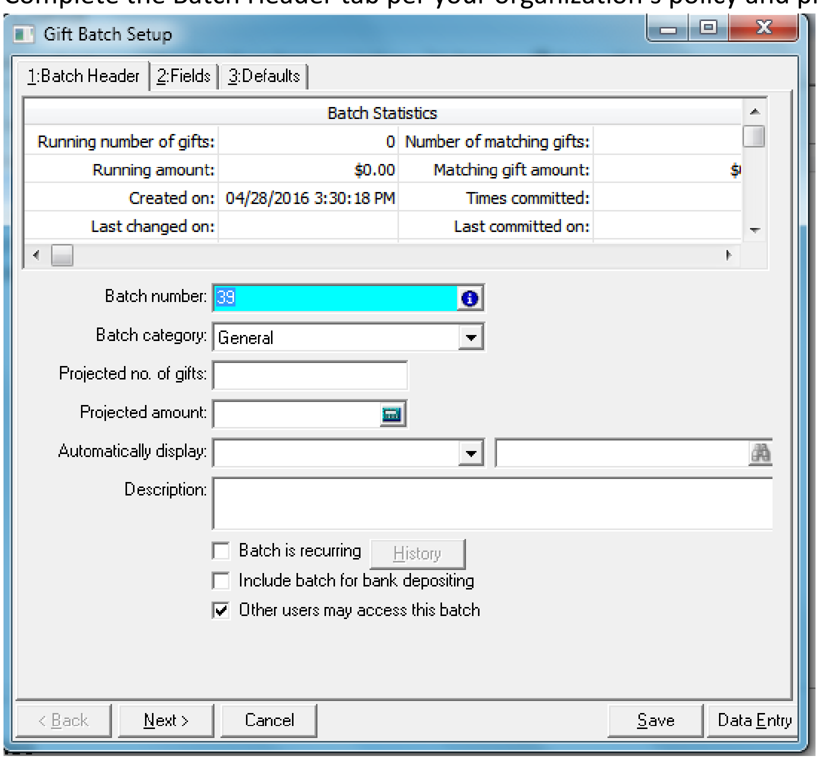


In Raiser's Edge, gift batch is considered to be the best practice for gift entry. To access this area, click on Batch on the left-hand side menu of Raiser's Edge.

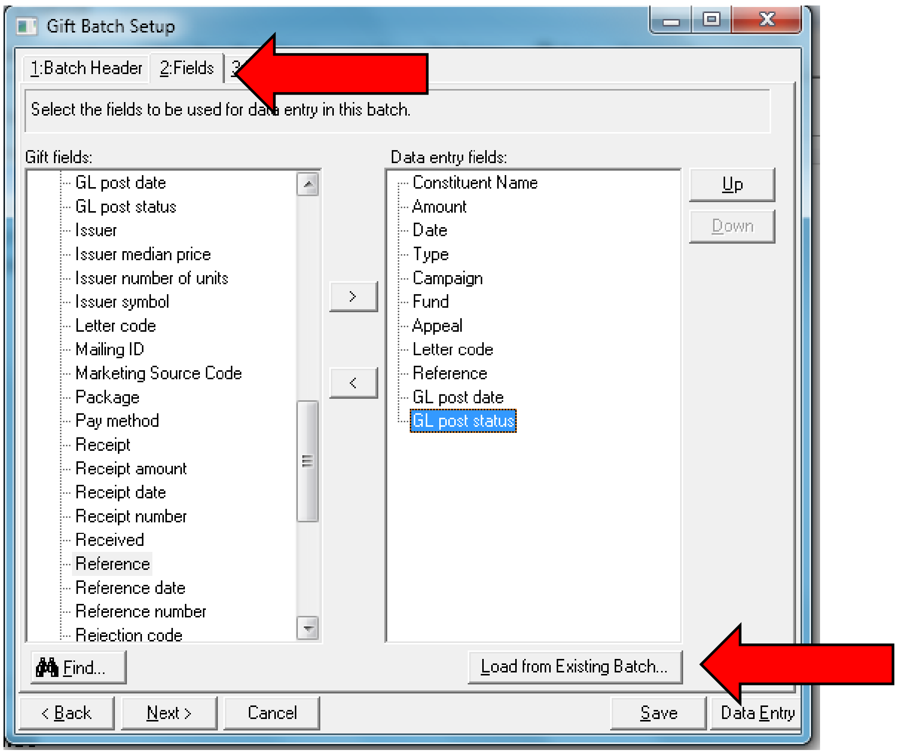
Click on New Gift Batch to start a new batch.



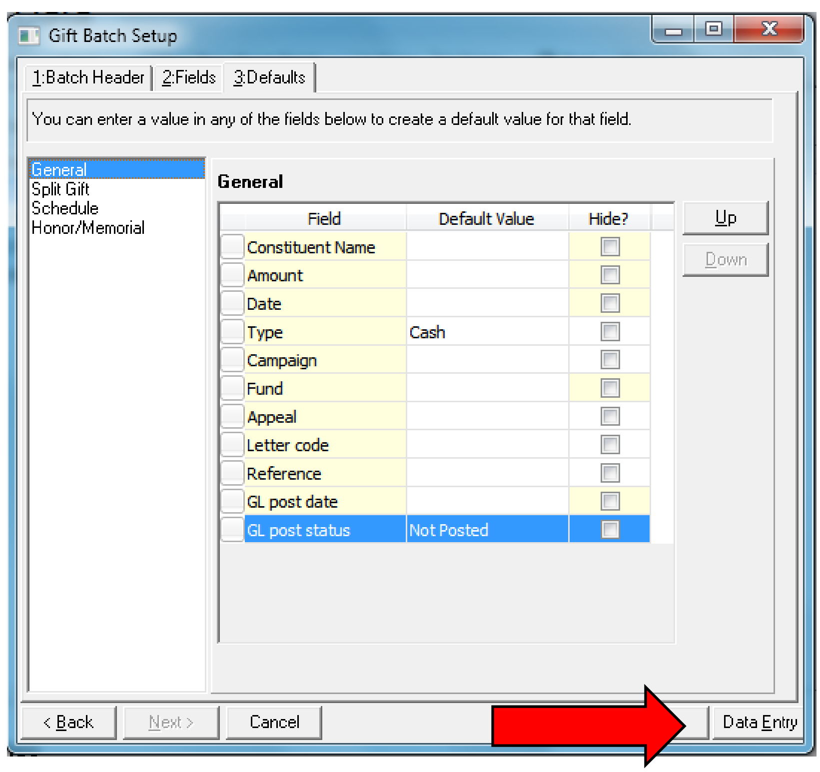
Complete the Batch Header tab per your organization's policy and procedures.



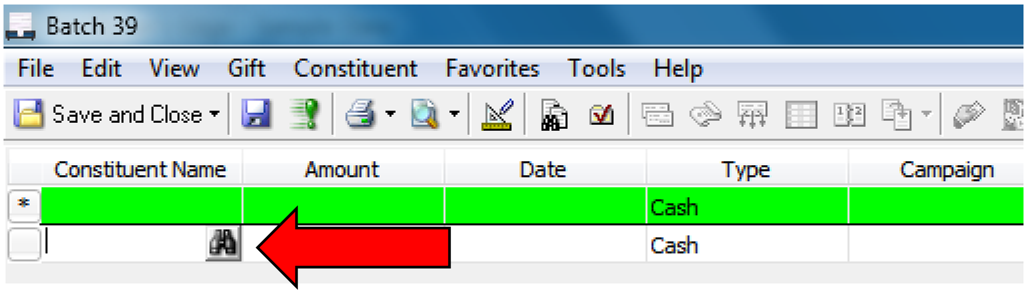
On the Fields tab, click on Load from Existing Batch and load a previous batch or template to define which gift fields will be included in the batch.



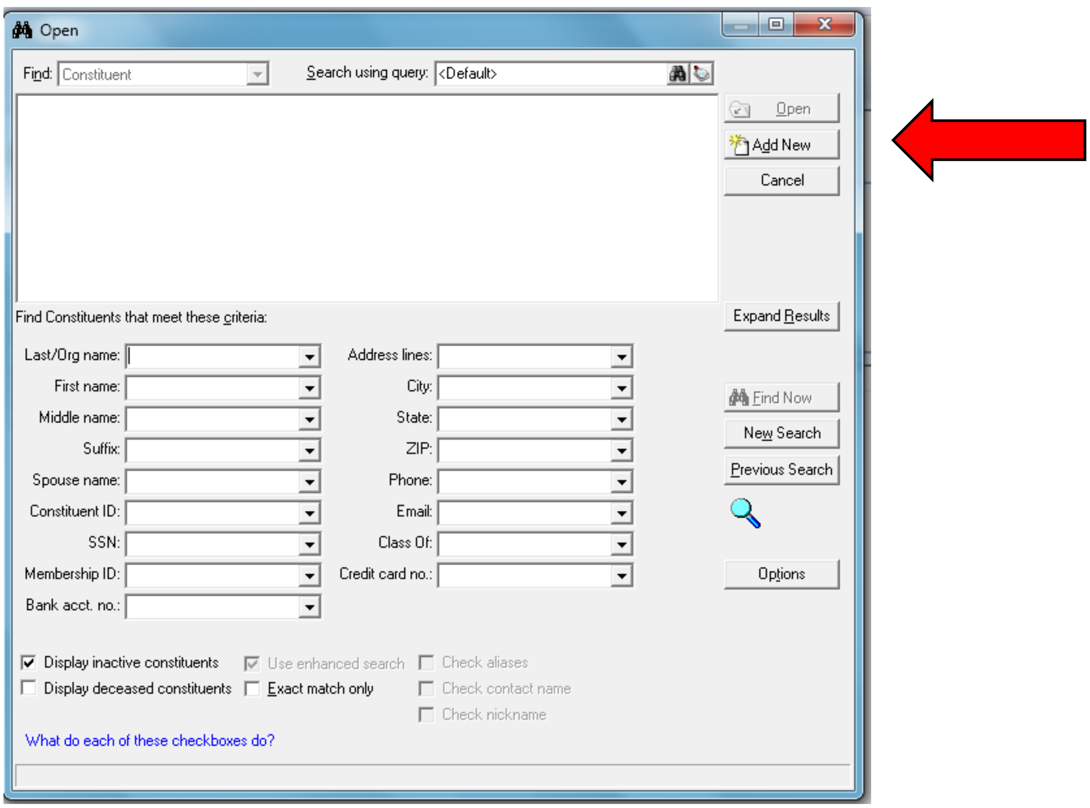
On the Default tab set any default values that apply to this batch. Click the Data Entry button in the bottom right-hand corner to open the gift batch.



In the Constituent Name field click on the binoculars to search for the organization who contributed the gift.



If the organization does not exist in your database, click the Add New button to create a new constituent record.



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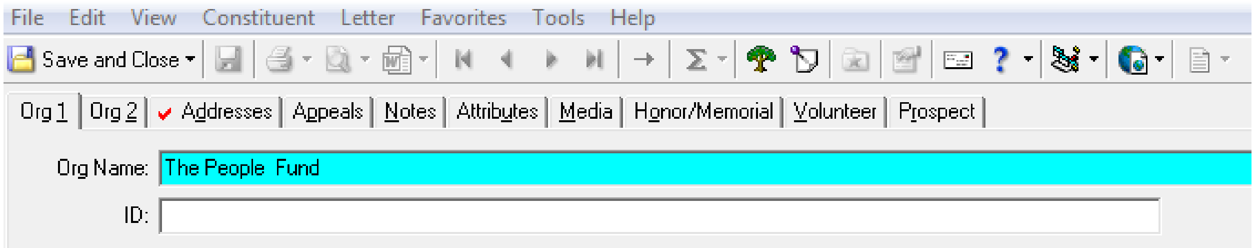
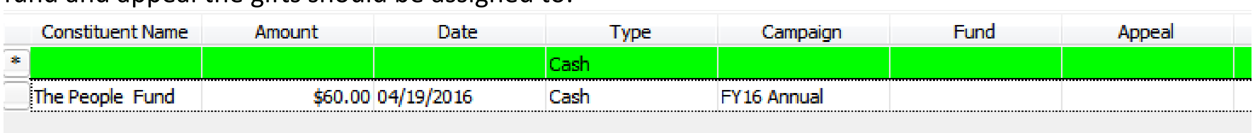
When creating a new organization record within batch, the Relationship tab is not available. If you have contact information for this organization, you can add it to the record after you complete the gift entry in batch or open the record after you commit the batch.

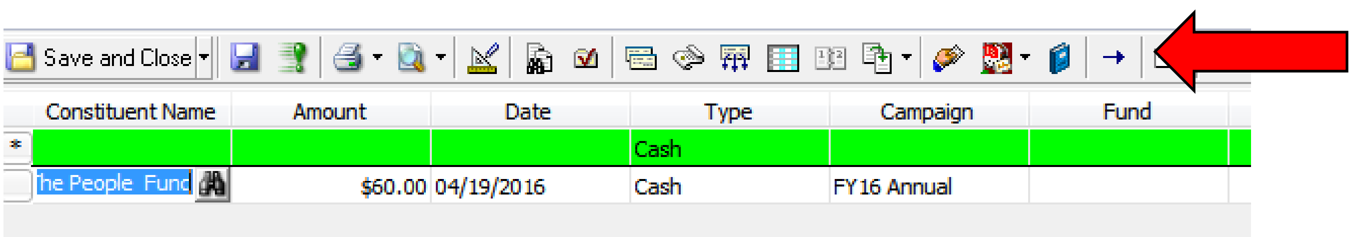


In gift batch, complete the gift fields appropriately from the LO export. You will find campaign information in the LO export but not fund and appeal information. You may need to discuss these gifts with a supervisor to determine which fund and appeal the gifts should be assigned to.

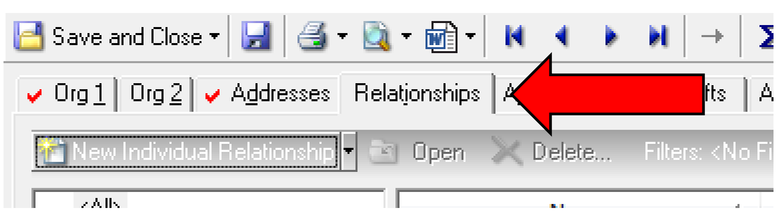


Complete the other gift fields per your organization's gift entry policies and procedures.

To open a constituent record to add contact information, highlight the constituent name and click on the blue arrow icon.

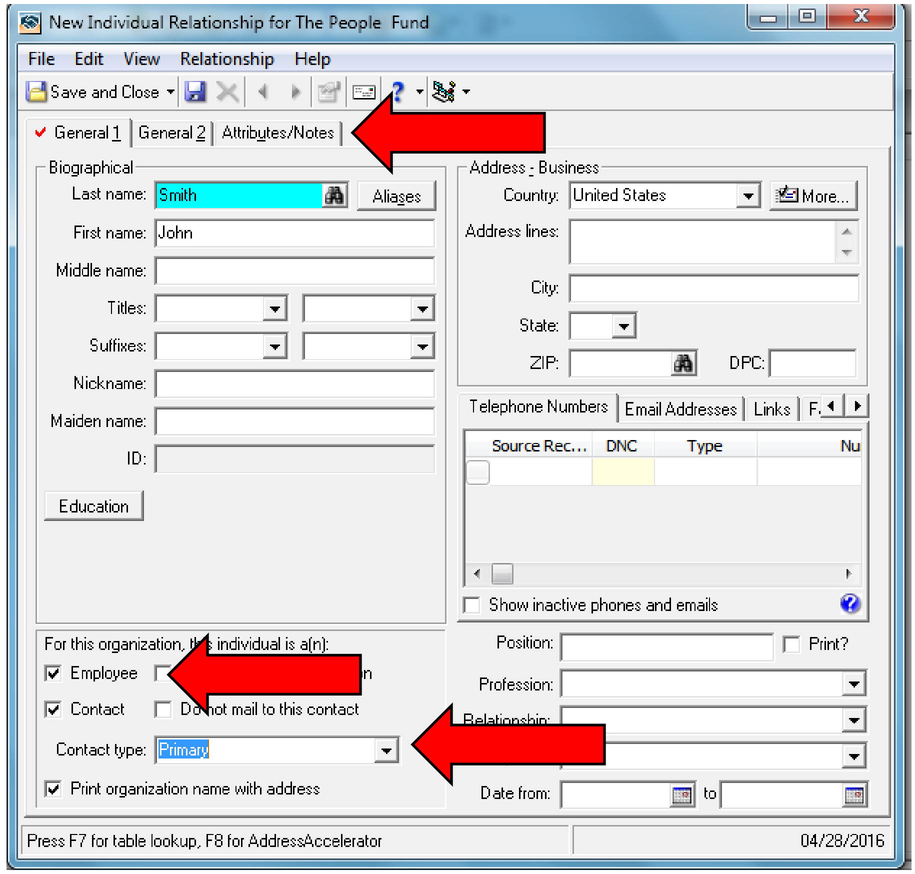


Click on the Relationship tab to add an Individual relationship to the organization.



If the contact is a constituent in your database, click on the binoculars icon in the last name field to search for their record. Otherwise, complete the biographical information, check the Employee and Contact boxes and add a Contact Type.

Click Save and Close in the top left-hand corner to close the relationship record.



Click Save and Close in the top left-hand record of the constituent record to close it and return to gift batch.

Repeat the above steps to add all organization gifts from the LO export. Once your batch is complete, click the Commit icon to commit the batch.