

The Raiser's Edge™

The Raiser's Edge and
Luminate Online Integration Guide

042312

©2015 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7RELO-042312

The Raiser's Edge and Luminare Online Integration

Configure The Raiser's Edge for Integration with Luminare Online	1
Configure Luminare Online for Integration with The Raiser's Edge	5
Download Transactions from Luminare Online to The Raiser's Edge	11
Groups and Queries	24
Field Mapping Between Luminare Online and The Raiser's Edge	25
How It Works	37

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

Configure The Raiser's Edge for Integration with Luminare Online

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

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

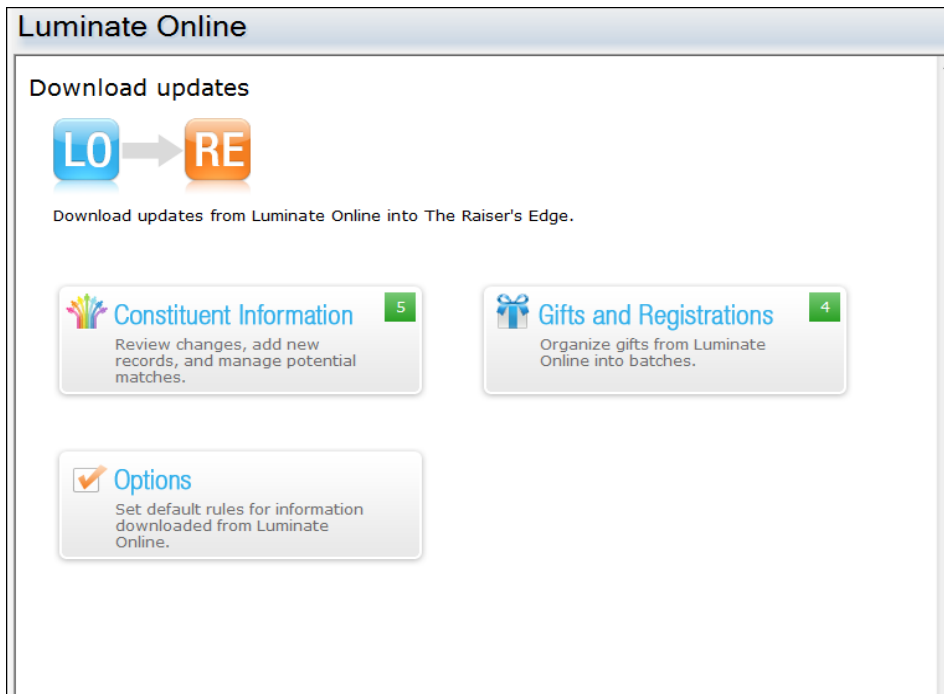
Luminate Online Options

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

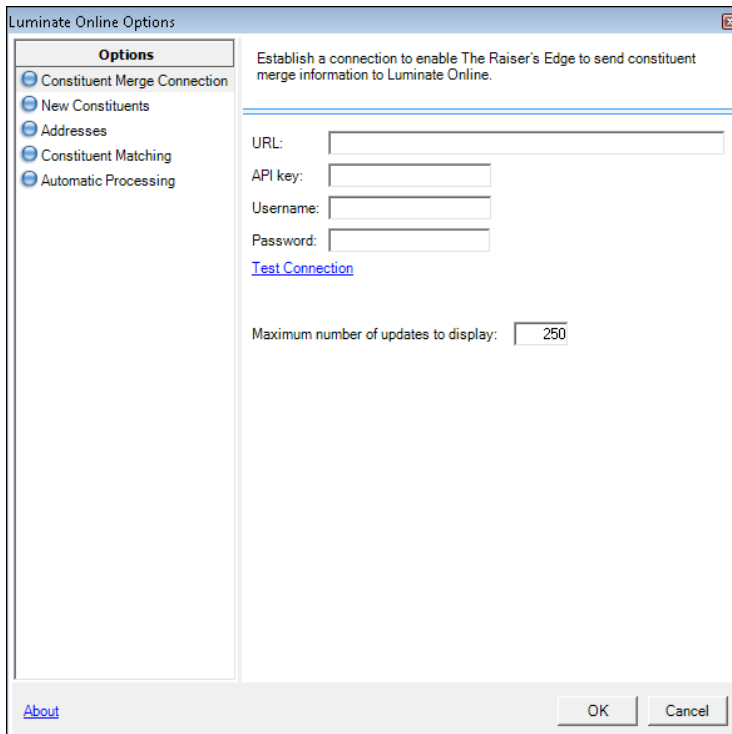
On the Luminate Online Options page, you must also establish a connection between **The Raiser's Edge** and **Luminate Online** to transfer constituent information when you merge records in **The Raiser's Edge** that are linked to constituent records in **Luminate Online**.

► Set Luminate Online Options for Information Downloaded from Luminate Online to The Raiser's Edge

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



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



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

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

5. Click **Test Connection** to verify that you entered the correct information to establish the connection between *The Raiser's Edge* and *Luminate Online* necessary to transfer constituent merge information. If you entered the correct information, a confirmation message appears. Click **OK**. If the connection fails, verify you entered the correct information, or contact your system administrator.
6. In the **Maximum number of updates to display** field, enter the maximum number of constituent or gift updates that should appear on the Luminate Online page in *The Raiser's Edge* when you download information from *Luminate Online*.
7. Under **Options**, select **New Constituents**.
8. Under **Constituent Code applied for all new constituents**, select the constituent code to automatically apply to each new constituent downloaded from *Luminate Online* to *The Raiser's Edge*.

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

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

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

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

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

11. Under **Options**, select **Constituent Matching**.
12. Select the information fields to use as search criteria for constituent matching and auto-matching for constituents downloaded from **Luminate Online** to **The Raiser's Edge**.
Select **Exact Match** if the constituent information fields you selected must match exactly to be considered a potential match for constituents downloaded from **Luminate Online** to **The Raiser's Edge**.
Select **Include Inactive** to include constituent marked as inactive in **The Raiser's Edge** when the program checks for potential matches.
Select **Include deceased** to include constituent marked as deceased in **The Raiser's Edge** when the program checks for potential matches.
13. Under **Options**, select **Automatic processing**.
14. Select **New records from Luminate Online** to automatically process any new constituents created in **Luminate Online** directly into **The Raiser's Edge**. If you select this option there will be no manual review of new constituents. After the constituent is added in **Luminate Online**, a linked record will be created in **The Raiser's Edge**.
15. Select **Updates to Linked Luminate Online Records** to automatically process any updates to constituents in **Luminate Online** that are already linked to a constituent in **The Raiser's Edge**. If you select this option there will be no manual review of updates to constituent information. After the constituent information is updated in **Luminate Online**, the linked record in **The Raiser's Edge** will be modified with the same updated information.

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

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

Update Blackbaud Web Services for On-Premise Clients

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

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

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

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

Web Services

Web Service Console

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

Installed Services
Services currently installed on this computer are listed below.

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

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

Configure Luminate Online for Integration with The Raiser's Edge

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

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

Phone field of the donation form, you can configure that to appear as a home phone number in *The Raiser's Edge* when the constituent information is downloaded.

Assign Cross-References in Luminate Online

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

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

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

Donation Management

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

Campaigns

Create a New Campaign | Upload Many Campaigns

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

Campaigns | All Donation Forms

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

All My Categories [v] Go

Search Show All Page 1 of 1 To Page

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

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

The screenshot shows the 'Donation Management' interface. At the top, there are navigation tabs: 'Online Giving', 'Donation Classic', 'Pending Contributions', 'Sustaining Gifts', 'Designated Giving', 'Membership Types', 'Donation Reports', and 'General Configurations'. Below these, the breadcrumb 'Campaigns > Basic Campaign' is visible. A sidebar on the left lists four steps: 1. Identify Campaign, 2. Choose Financial Options, 3. Specify Groups and Notifications, and 4. Configure Cross References (which is highlighted). The main content area has a heading 'The Raiser's Edge Donation Campaign' and a message: 'Use this page to cross reference a Luminate Online object with its defined CRM counterpart. (Tell me more)'. Below this, it states 'This cross reference is not required. Click here to configure this cross reference.' A section titled '* 1. The Raiser's Edge Fund' contains a 'Filter:' input field and a table with two columns: 'Name' and 'Selected Value'. The table lists several fund options: 'Designation Fund (Designation Fund)', 'Designatee Fund 1 (Designatee Fund 1)', 'Designatee Fund 2 (Designatee Fund 2)', 'Designatee Fund 3 (Designatee Fund 3)', 'Event (Deductable) Ticket Fund (Event (Deductable))', and 'Event (Non-Deductable) Ticket Fund (Event (Non-Deduct))'.

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

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

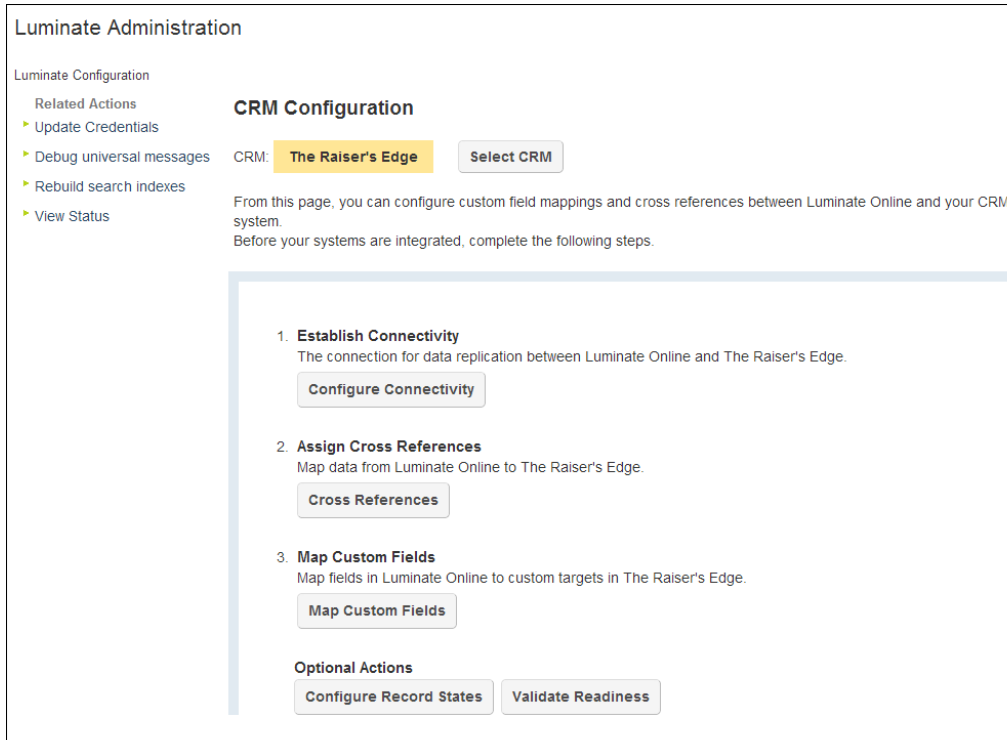
Map Phone and Email Types to The Raiser's Edge

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

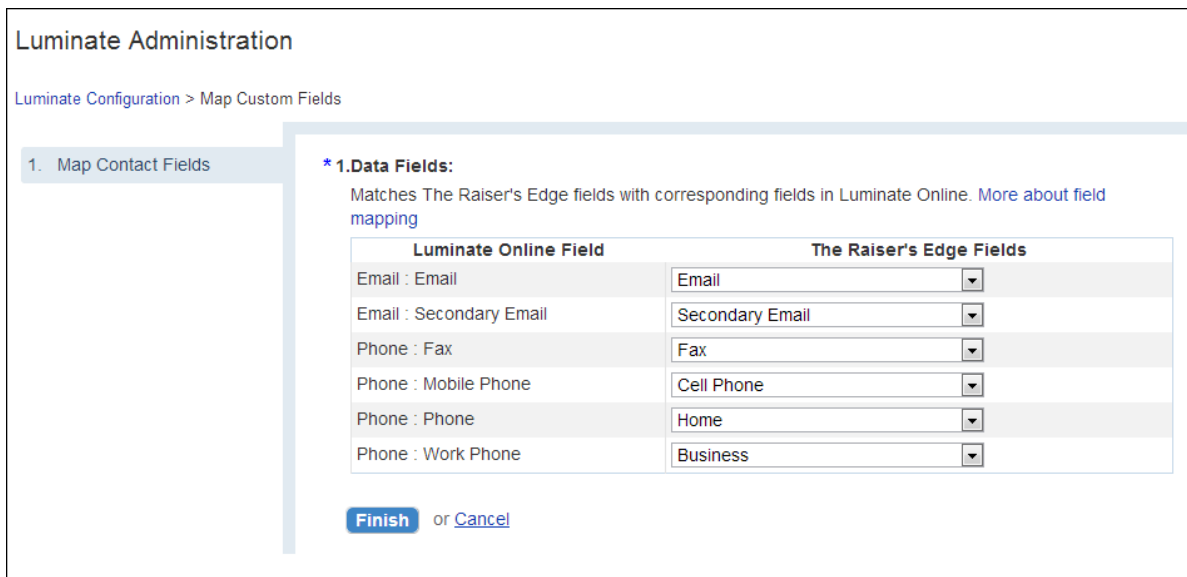
of the donation form, you can configure that to appear as a home phone number in *The Raiser's Edge* when the constituent information is downloaded.

► **Map Phone and Email Types**

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



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



3. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** email type to associate with the **Luminate Online Email** field.
4. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** email type to associate with the **Luminate Online Secondary Email** field.
5. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** phone type to associate with the **Luminate Online Fax** field.
6. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** phone type to associate with the **Luminate Online Mobile Phone** field.
7. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** phone type to associate with the **Luminate Online Phone** field.
8. Under **The Raiser's Edge Fields**, select **The Raiser's Edge** phone type to associate with the **Luminate Online Work Phone** field.
9. Click **Finish**. You return to the Luminate Administration page.

Configure TeamRaiser Cross References

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

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

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

TeamRaiser

TeamRaiser List Cross-Event Teams Registration Upsells Uploads Participant Centers

TeamRaiser List > Walk-A-Thon

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

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

The Raiser's Edge TeamRaiser Campaign

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

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

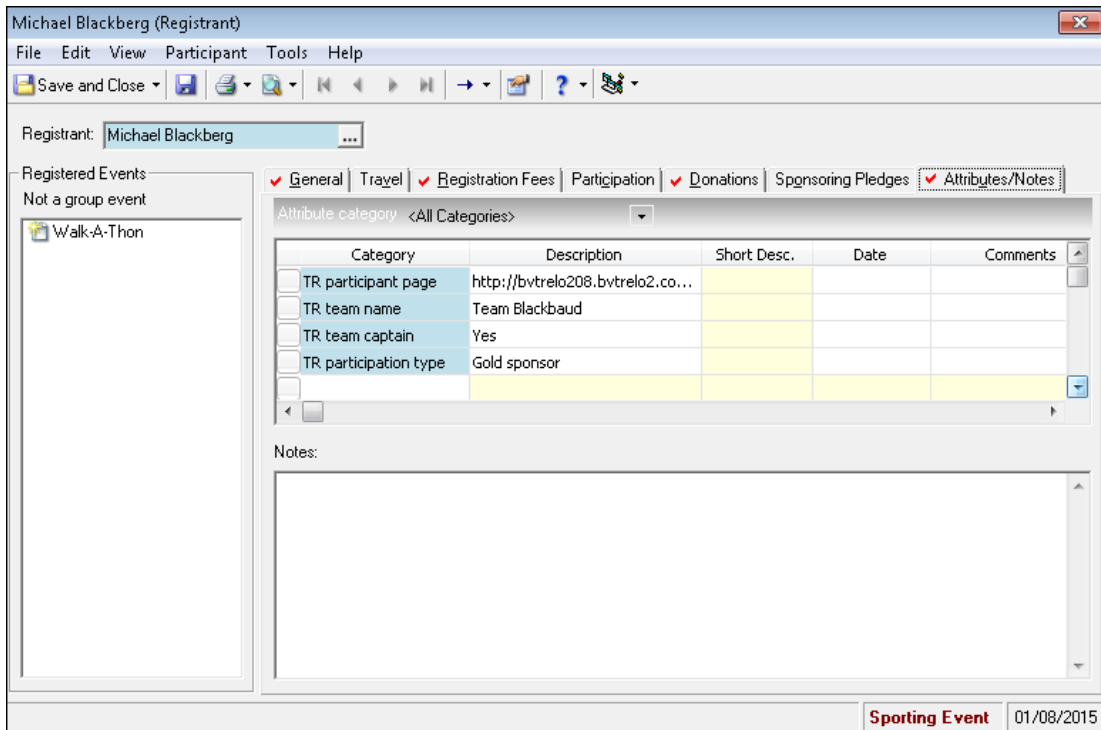
Filter:

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

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

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

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



Download Transactions from Luminate Online to The Raiser's Edge

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

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

Download Constituent Information from Luminate Online

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

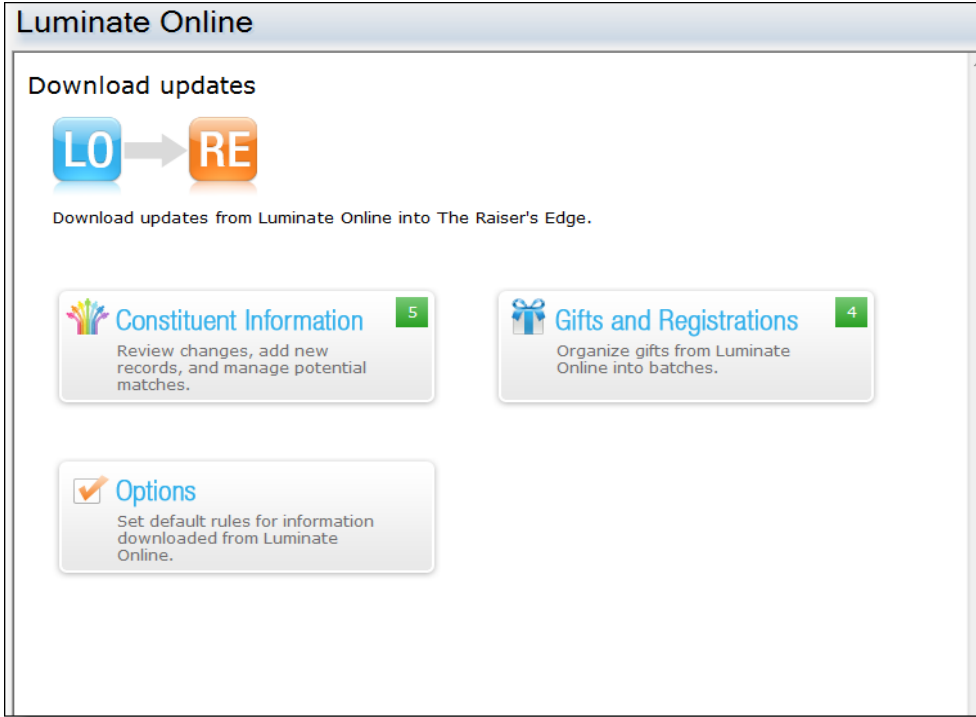
When you download constituent information from *Luminate Online* into *The Raiser's Edge*, you review all biographical and address information for each constituent before you process the updates. You can choose to accept or reject any of the information before you download it to your database in *The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

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

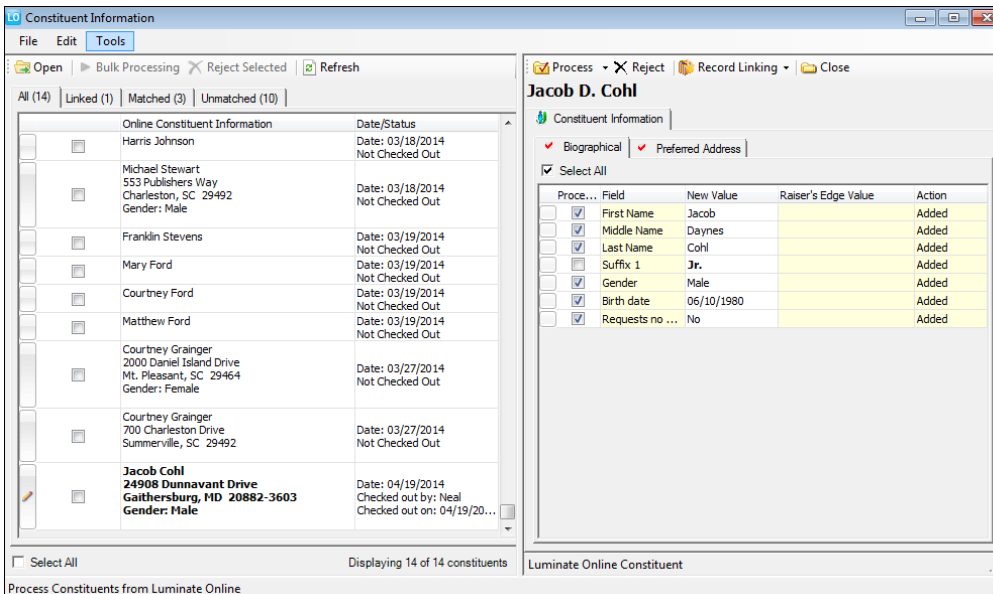
Note: If you have selected to automatically process new constituents or updates to constituent records already linked in *The Raiser's Edge*, they will not appear on the Luminate Online page for review.

► **Download Constituent Information from Luminate Online**

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



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



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

The All tab contains every new or updated constituent from **Luminate Online**, the Linked tab displays only the constituents from **Luminate Online** that are already linked to a constituent in **The Raiser's Edge**, the Matched tab displays constituents from **Luminate Online** that have a potential match to a constituent that already exists in **The Raiser's Edge**, and the Unmatched tab displays the constituents from **Luminate Online** that do not match to a constituent in **The Raiser's Edge**.

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

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

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

The screenshot shows the 'Constituent Information' window for 'Jacob D. Cohl'. It features two tabs: 'Biographical' (selected) and 'Preferred Address'. A 'Select All' checkbox is checked. Below is a table with columns: Process?, Field, New Value, Raiser's Edge Value, and Action.

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

At the bottom of the window, it says 'Luminate Online Constituent'.

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

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

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

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

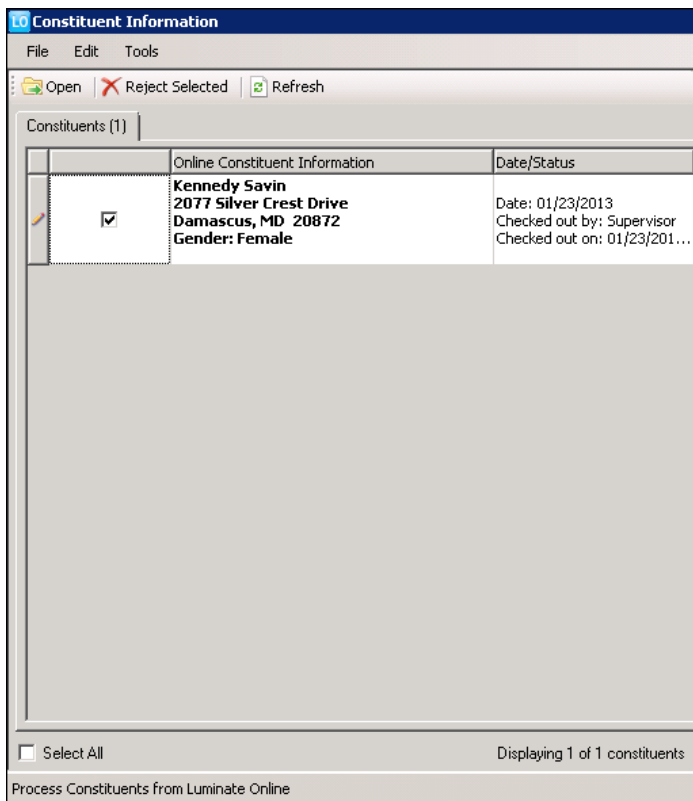
Reject Constituent Updates

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

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

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

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



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

Download Donations and Gifts from Luminate Online

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

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

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

You can only accept gifts through **Luminate Online** for constituents that already exist in **The Raiser's Edge**. If you receive a donation through **Luminate Online** from a new constituent, you must first download the new constituent information into **The Raiser's Edge** before you can process the gift. For information about how to download constituent information from **Luminate Online** into **The Raiser's Edge**, see Download Constituent Information from Luminate Online on page 11.

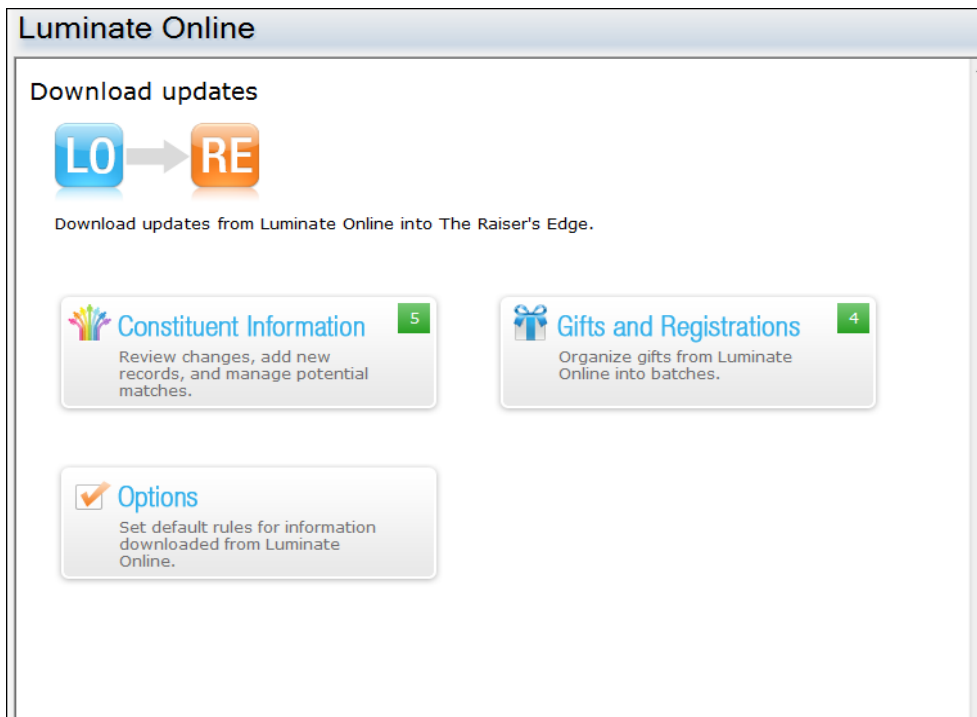
When you download a recurring gift from **Luminate Online** into **The Raiser's Edge**, you process the first payment. When each subsequent payment is due, it is automatically downloaded for you to then process.

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

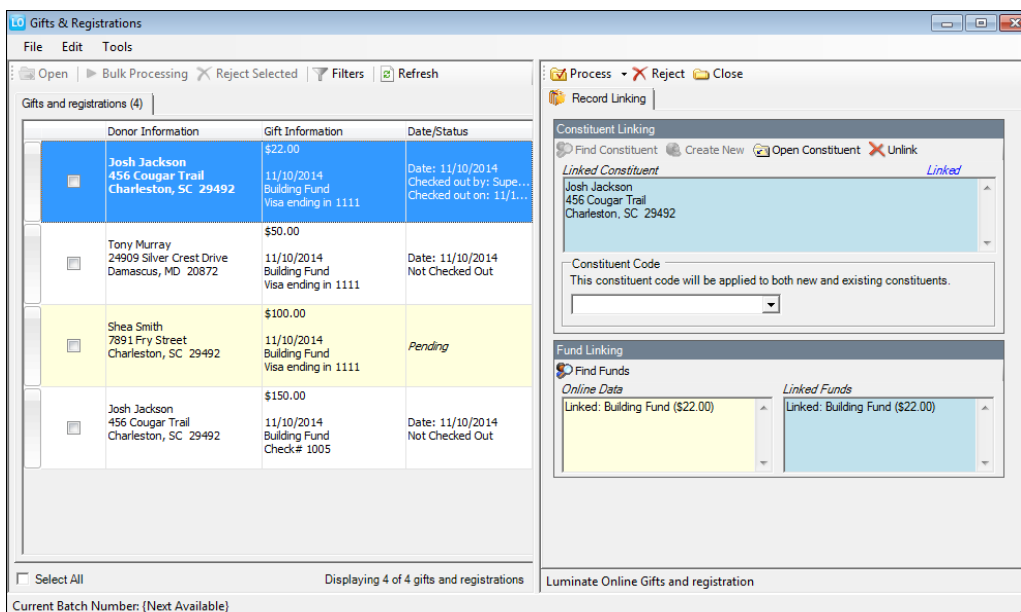
Before you begin to download gifts from **Luminate Online**, review the default batch options and make changes as necessary, such as to specify batch numbers.

► Configure Gift Batch Options

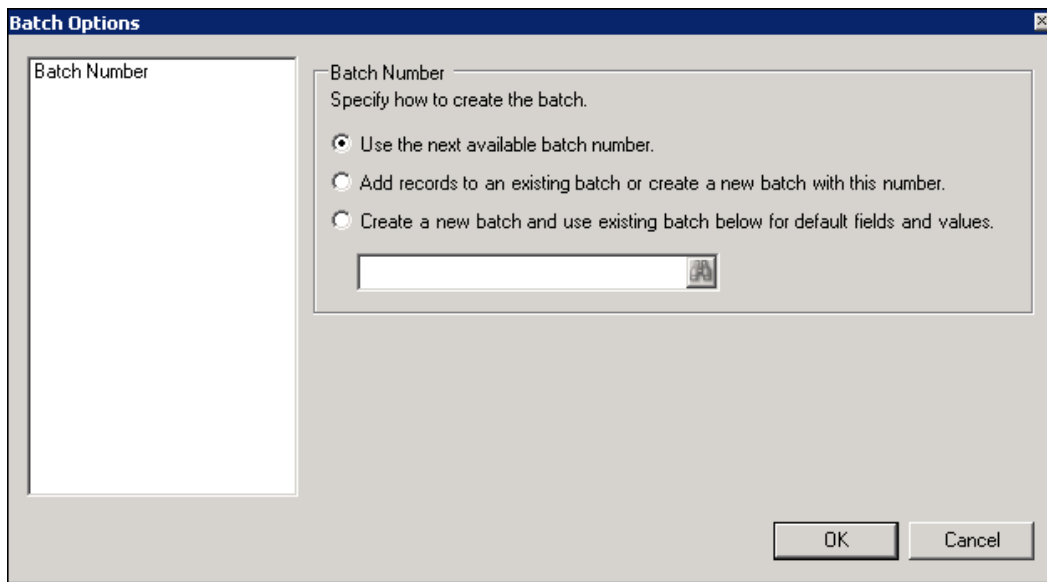
1. From *The Raiser's Edge* home page, click *Luminate Online* on the navigation bar. The Luminate Online page appears.



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



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



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

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

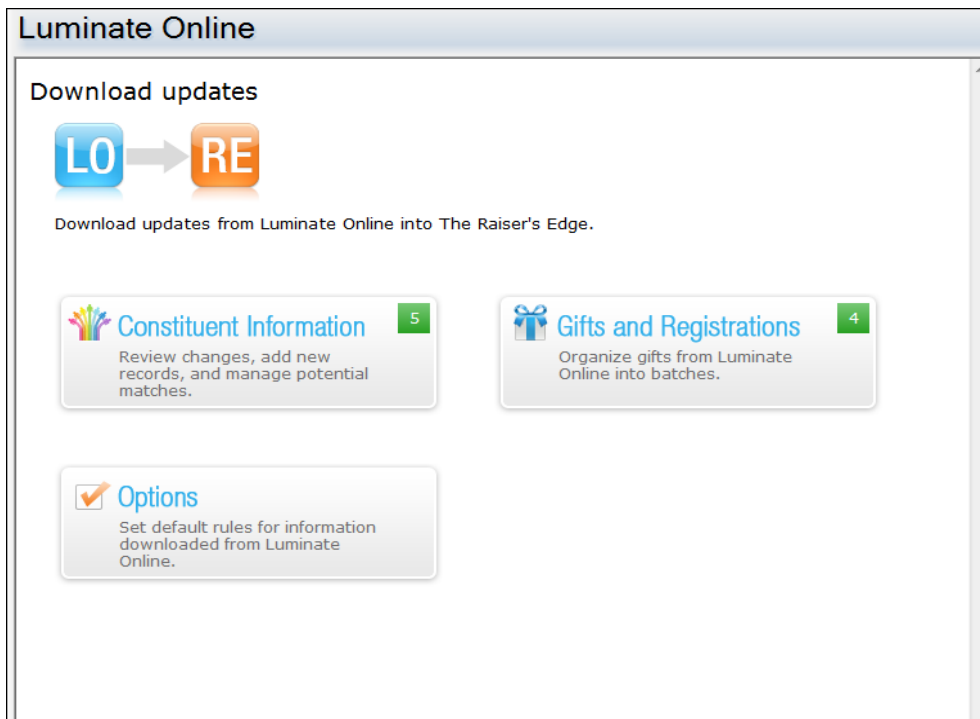
To download the gifts to an existing batch in *The Raiser's Edge*, select **Add records to an existing batch or create a new batch with this number**. In the search field, click the binoculars to select the existing batch or create a new batch for the transactions. If the batch includes a default set, the values apply to the gifts you include in the existing batch.

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

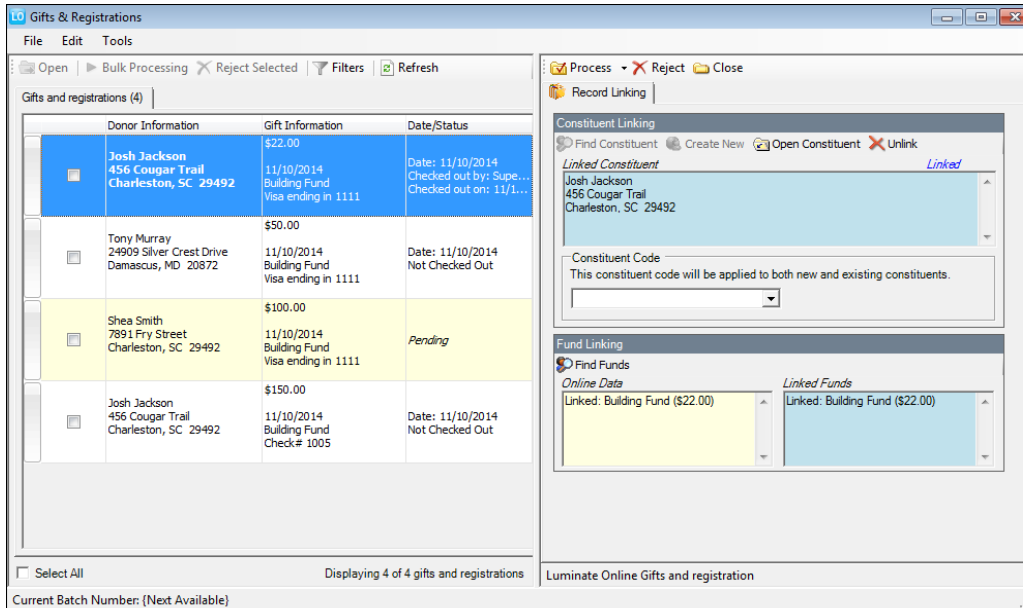
5. Click **OK**. You return to the Gifts and Registrations screen.

► Download Donations and Gifts from Luminate Online

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



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



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

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

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

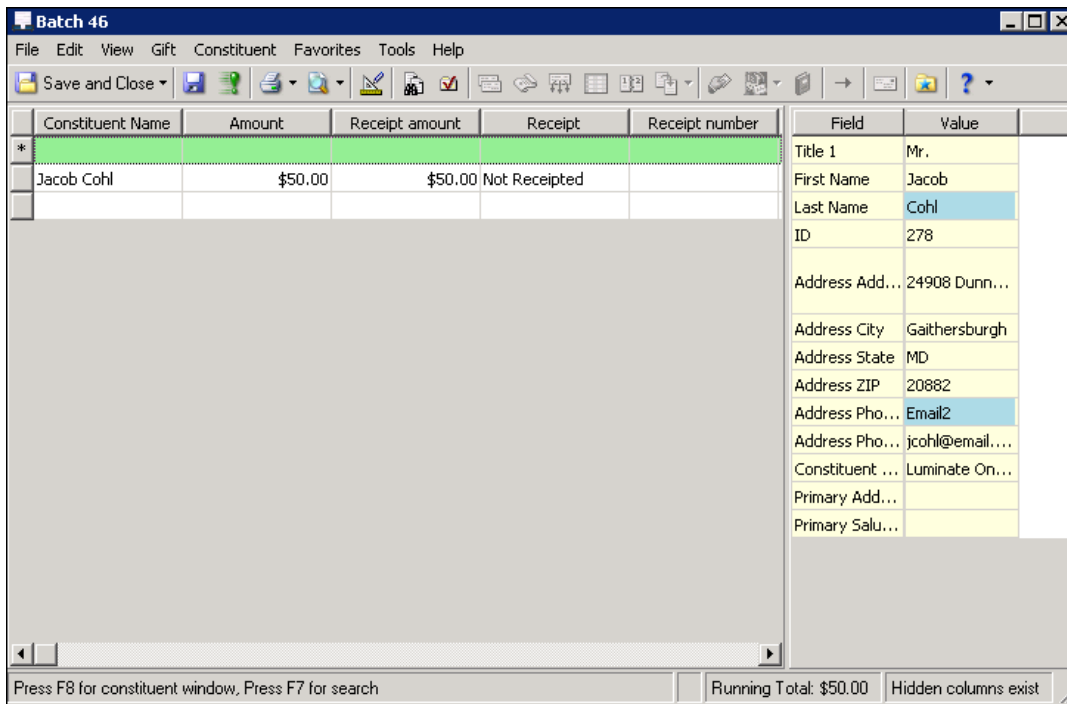
- In the **Constituent Linking** grid, the constituent who gave the gift appears. If the constituent is linked to one that already exists in *The Raiser's Edge*, you can click **Open Constituent** to view the constituent record.
- Under **Constituent Code**, select the constituent code to apply to the constituent after you process the gift.

In the **Fund Linking** grid, the fund to which the gift is applied appears. Under **Online Data**, the *Luminate Online* fund appears, and under **Linked Funds**, the associated fund in *The Raiser's Edge* to which the gift will be applied after it is downloaded appears.

- Click **Process** on the toolbar. A confirmation message appears.

Note: If any changes were made to the constituent information, such as updated address information, when the donation was made in *Luminate Online*, a screen appears to ask whether to process those changes before the gift batch is created. When you click **Yes**, the Constituent screen appears to review and accept the changes. To accept the changes, select the rows to update in the **Process** column, and click **Save and Close** on the toolbar. You return to the Donations and Gifts screen.

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



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

Commit Gift Batch

1: General | 2: Payments

Step 1: Enter general information

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

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

< Back Next > Cancel Commit Now

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

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

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

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

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

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

TeamRaiser Gifts and Registrations

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

TeamRaiser

TeamRaiser List | Cross-Event Teams | Registration Upsells | Uploads | Participant Centers

TeamRaiser List > Walk-A-Thon

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

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

The Raiser's Edge TeamRaiser Campaign

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

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

Filter:

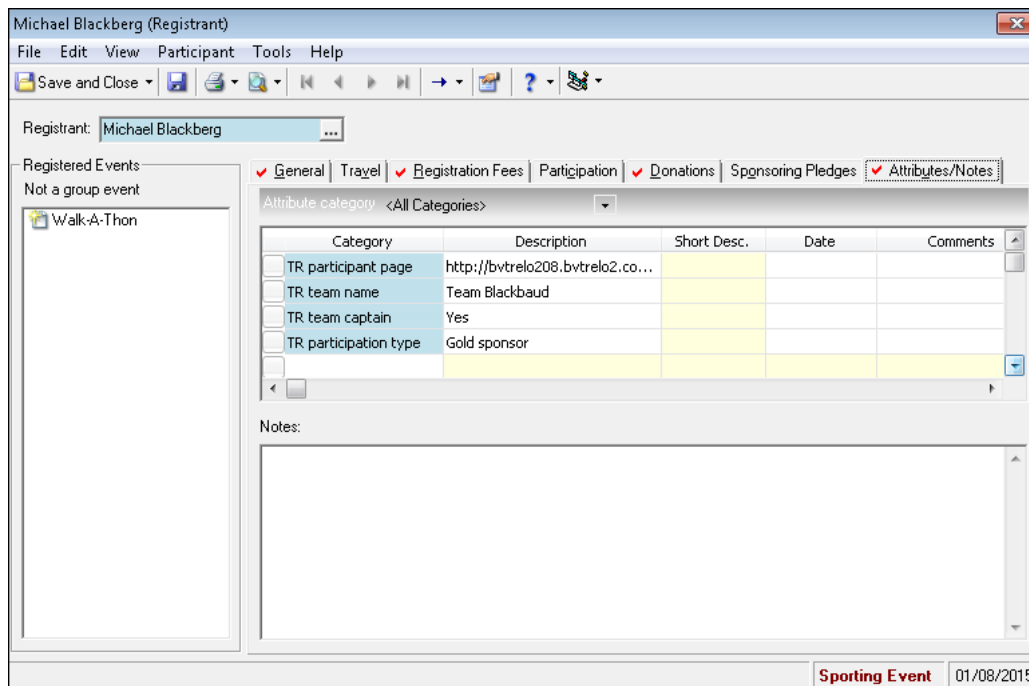
Name	Selected Value
Assets Acquisition Fund (ACQUISITION)	Building Fund (BUILDING)
Botanical Garden Fund (GARDEN)	
Building Fund (BUILDING)	
Computer Equipment (COMPUTER EQUIPMENT)	
Computer Furniture (COMPUTER FURN)	
Computer Lab Fund (LAB)	
Library Books (LIBRARY BOOKS)	
Library Fund (LIBRARY)	
Library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

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

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

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

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



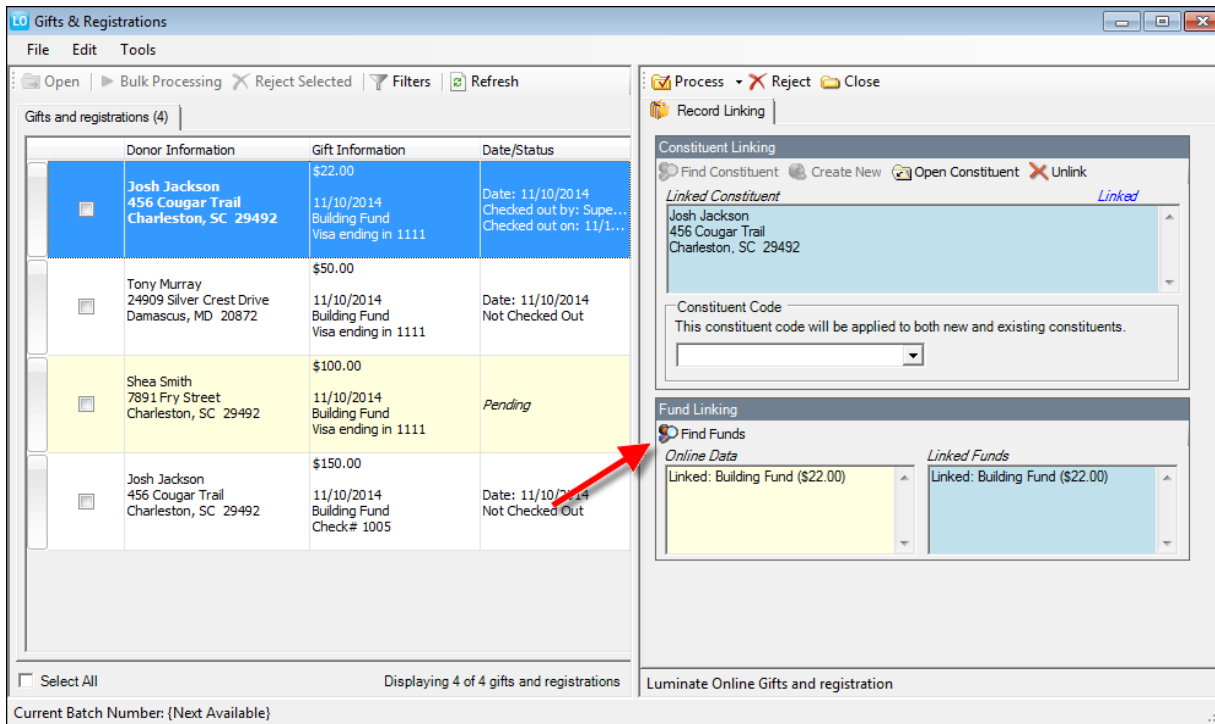
Write-In Fund Donations

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

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

Note: For information about how to assign cross-references in **Luminate Online** to funds in **The Raiser's Edge**, see Assign Cross-References for campaigns, funds, and appeals on page 6. For information about how to create funds in **The Raiser's Edge**, see the *Campaigns, Funds, and Appeals Data Entry Guide*.

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



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

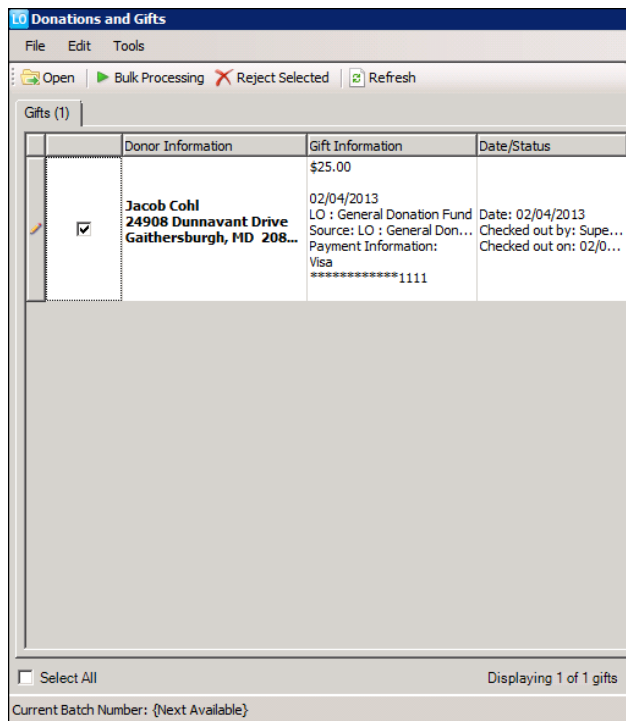
For information about how to download donations and gifts from *Luminate Online* to *The Raiser's Edge*, see Download Donations and Gifts from Luminate Online on page 17 .

Reject Donations and Gifts

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

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

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



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

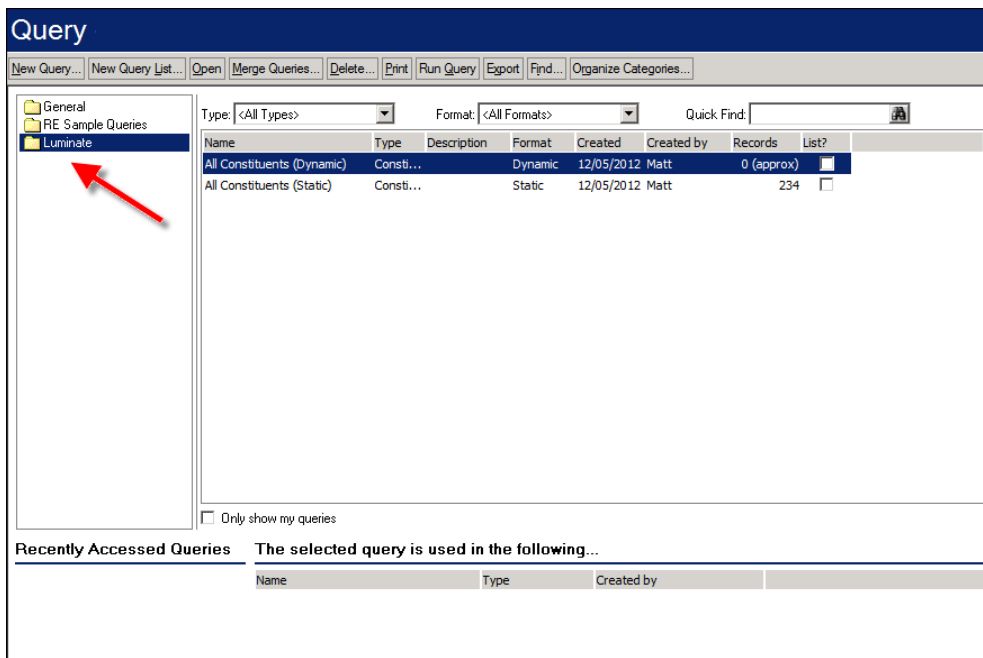
Note: You can also click **Reject** on the toolbar of the Record Linking tab.

Groups and Queries

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

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

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



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

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

Field Mapping Between Luminate Online and The Raiser's Edge

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

Constituent Field Mapping

In both *Luminate Online* and *The Raiser's Edge*, you track information about your organization's constituents, such as name, address, and other contact information. When you transfer data between the two programs, you transfer information from your *Luminate Online* constituent records to constituent records in *The Raiser's Edge*. *The Raiser's Edge* can also create new constituent records for new donors in *Luminate Online*. For information about how to download constituent updates from *Luminate Online*, see Download Constituent Information from Luminate Online on page 12.

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

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Information			
Salutation (Casual) field	Constituent profile, Biographical Information	Primary salutation field	Constituent record, Addressees/Salutations tab	
Salutation (Formal) field	Constituent profile, Biographical Information	Primary addressee field	Constituent record, Addressees/Salutations tab	
First Name field	Constituent profile, Biographical Information	First name field	Constituent record, Bio 1 tab	
Middle Name field	Constituent profile, Biographical Information	Middle name field	Constituent record, Bio 1 tab	
Last Name field	Constituent profile, Biographical Information	Last name field	Constituent record, Bio 1 tab	
Nickname field	Constituent profile, Biographical Information	Nickname field	Constituent record, Bio 1 tab	
Maiden Name field	Constituent profile, Biographical Information	Maiden name field	Constituent record, Bio 1 tab	
Suffix field	Constituent profile, Biographical Information	Suffix 1 field	Constituent record, Bio 1 tab	
Professional Suffix field	Constituent profile, Biographical Information	Suffix 2 field	Constituent record, Bio 1 tab	
Date of Birth field	Constituent profile, Biographical Information	Birth date field	Constituent record, Bio 1 tab	
Gender field	Constituent profile, Biographical Information	Gender field	Constituent record, Bio 1 tab	
Marital Status field	Constituent profile, Biographical Information	Marital status field	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Deceased field	Constituent profile, Biographical Information	Deceased checkbox	Constituent record, Bio 1 tab	
Ethnicity field	Constituent profile, Biographical Information	Ethnicity field	Constituent record, Bio 2 tab	
Religion field	Constituent profile, Biographical Information	Religion field	Constituent record, Bio 2 tab	
Email field	Constituent profile, Email	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Email Status field	Constituent profile, Email	N/A	N/A	The Email Status field does not map to <i>The Raiser's Edge</i> .
Email Opt-Out Date field	Constituent profile, Email	N/A	N/A	The Email Opt-Out Date field does not map to <i>The Raiser's Edge</i> .
Accept Email field	Constituent profile, Email	Requests no email checkbox	Constituent record, Bio 1 tab	
Work Phone field	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Mobile Phone field	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Phone field	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Fax field	Constituent profile, Phone	Phones/Email/Links grid	Constituent record, Bio 1 tab, Phones/Email/Links grid	
Accept Mail checkbox	Constituent profile, Address	Send Mail? checkbox	Constituent record, Addresses tab	
Occupation field	Constituent profile, Employment	Profession field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Position field	Constituent profile, Employment	Position field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer field	Constituent profile, Employment	Org name field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Employer Address Street 1 field	Constituent profile, Employment	Address lines field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Street 2 field	Constituent profile, Employment	Address lines field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Street 3 field	Constituent profile, Employment	Address lines field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address City field	Constituent profile, Employment	City field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address State/Province field	Constituent profile, Employment	State field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address ZIP/Postal Code field	Constituent profile, Employment	ZIP field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Employer Address Country field	Constituent profile, Employment	Country field	Constituent record, Bio 1 tab, Organization Relationship screen, General 1 tab	
Member ID field	Constituent profile, Biographical Information	System record ID field	Constituent record, Constituent Properties screen	On the constituent record, click File on <i>The Raiser's Edge</i> toolbar, and select Properties .
Constituent ID field	Constituent profile, Biographical Information	Alias field	Constituent record, Bio 1 tab, Aliases screen	On the Bio 1 tab of the constituent record, click the Aliases button.
Exchange ID field	Constituent profile, Biographical Information	Import ID field	Constituent record, Constituent Properties screen	On the constituent record, click File on <i>The Raiser's Edge</i> toolbar, and select Properties
Street 1 field	Constituent profile, Address	Address lines field	Constituent record, Bio 1 tab	
Street 2 field	Constituent profile, Address	Address lines field	Constituent record, Bio 1 tab	
Street 3 field	Constituent profile, Address	Address lines field	Constituent record, Bio 1 tab	
City field	Constituent profile, Address	City field	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
State/Province field	Constituent profile, Address	State field	Constituent record, Bio 1 tab	
ZIP/Postal Code field	Constituent profile, Address	ZIP field	Constituent record, Bio 1 tab	
Country field	Constituent profile, Address	Country field	Constituent record, Bio 1 tab	
County field	Constituent profile, Address	County field	Constituent record, Addresses tab, Edit preferred address screen	From the Addresses tab of a constituent record, select an address in the grid and click Open , or add a new address.
County ID (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The County ID (Manual Override) field does not map to <i>The Raiser's Edge</i> .
County District (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The County District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
Municipality (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The Municipality (Manual Override) field does not map to <i>The Raiser's Edge</i> .
Congressional District (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The Congressional District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
State Senate District (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The State Senate District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
State House District (Manual Override) field	Constituent profile, Advocacy Information	N/A	N/A	The State House District (Manual Override) field does not map to <i>The Raiser's Edge</i> .
County District (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The County District (Automatic) field does not map to <i>The Raiser's Edge</i> .
Municipality (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The Municipality (Automatic) field does not map to <i>The Raiser's Edge</i> .
Municipality ID (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The Municipality ID (Automatic) field does not map to <i>The Raiser's Edge</i> .
Municipal District	Constituent profile, Advocacy	N/A	N/A	The Municipal District (Automatic) field does not

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
(Automatic) field	Information			map to <i>The Raiser's Edge</i> .
State House District (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The State House District (Automatic) field does not map to <i>The Raiser's Edge</i> .
State Senate District (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The State Senate District (Automatic) field does not map to <i>The Raiser's Edge</i> .
Congressional District (Automatic) field	Constituent profile, Advocacy Information	N/A	N/A	The Congressional District (Automatic) field does not map to <i>The Raiser's Edge</i> .
Significant other First Name field	Constituent profile, Significant Other	First name field	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Middle Name field	Constituent profile, Significant Other	Middle name field	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Last Name field	Constituent profile, Significant Other	Last name field	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Title field	Constituent profile, Significant Other	Title 1 field	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Suffix field	Constituent profile, Significant Other	Suffix 1 field	Constituent record, Bio 1 tab, Individual Relationship screen, General 1 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
Significant Other Gender field	Constituent profile, Significant Other	Gender field	Constituent record, Bio 1 tab, Individual Relationship screen, General 2 tab	To access the Individual Relationship screen for a spouse, click Spouse on the constituent record, Bio 1 tab.
External First Gift Amount field	Constituent profile, Transaction Information	N/A	N/A	The External First Gift Amount field does not map to <i>The Raiser's Edge</i> .
External First Gift Date field	Constituent profile, Transaction Information	N/A	N/A	The External First Gift Date field does not map to <i>The Raiser's Edge</i> .
External Last Gift Date field	Constituent profile, Transaction Information	N/A	N/A	The External Last Gift Date field does not map to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
External Last Gift Amount field	Constituent profile, Transaction Information	N/A	N/A	The External Last Gift Amount field does not map to <i>The Raiser's Edge</i> .
External Largest Gift Date field	Constituent profile, Transaction Information	N/A	N/A	The External Largest Gift Date field does not map to <i>The Raiser's Edge</i> .
External Largest Gift Amount field	Constituent profile, Transaction Information	N/A	N/A	The External Largest Gift Amount field does not map to <i>The Raiser's Edge</i> .
External YTD Gift Count field	Constituent profile, Transaction Information	N/A	N/A	The External YTD Gift Count field does not map to <i>The Raiser's Edge</i> .
External YTD Gift Amount field	Constituent profile, Transaction Information	N/A	N/A	The External YTD Gift Amount field does not map to <i>The Raiser's Edge</i> .
External Lifetime Gift Count field	Constituent profile, Transaction Information	N/A	N/A	The External Lifetime Gift Count field does not map to <i>The Raiser's Edge</i> .
External Lifetime Gift Amount field	Constituent profile, Transaction Information	N/A	N/A	The External Lifetime Gift Amount field does not map to <i>The Raiser's Edge</i> .
Sustained giving Status field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Status field does not map to <i>The Raiser's Edge</i> .
Sustained giving Status field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Status field does not map to <i>The Raiser's Edge</i> .
Sustained giving Start Date field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Start Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Actual End Date field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Actual End Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Monthly Amount field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Monthly Amount field does not map to <i>The Raiser's Edge</i> .
Sustained giving Planned End	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Planned End Date field does not map to <i>The Raiser's Edge</i> .

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
Date field	ing Information			
Sustained giving Card Expiration Date field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Card Expiration Date field does not map to <i>The Raiser's Edge</i> .
Sustained giving Last Payment Attempt Failure Code field	Constituent profile, Sustained Giving Information	N/A	N/A	The sustained giving Last Payment Attempt Failure Code field does not map to <i>The Raiser's Edge</i> .
Membership Status field	Constituent profile, Membership Information	N/A	N/A	The g Membership Status field does not map to <i>The Raiser's Edge</i> .
Membership ID field	Constituent profile, Membership Information	N/A	N/A	The Membership ID field does not map to <i>The Raiser's Edge</i> .
Expiration field	Constituent profile, Membership Information	N/A	N/A	The Expiration field does not map to <i>The Raiser's Edge</i> .
Member Since Date field	Constituent profile, Membership Information	N/A	N/A	The Member Since Date field does not map to <i>The Raiser's Edge</i> .
Donor Status field	Constituent profile, Biographical Information	N/A	N/A	The Donor Status field does not map to <i>The Raiser's Edge</i> .

Gift Field Mapping

In both *Luminate Online* and *The Raiser's Edge*, you track information about donations and gifts given to your organization, such as amount, date, and receipts. When you transfer data between the two programs, you transfer information from your *Luminate Online* donations to gift records in *The Raiser's Edge*. For information about how to download information from *Luminate Online*, see Download Donations and Gifts from Luminate Online on page 15.

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

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

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

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	tory grid			
Donation Date field	Constituent profile, Transactions tab, Transaction History grid	Gift date field	Gift record, Gift tab	
Amount field	Constituent profile, Transactions tab, Transaction History grid	Credit no./exp. field	Gift record, Gift tab	The credit card number in Luminate Online appears in the Amount field of the Transaction History grid.
Amount field	Constituent profile, Transactions tab, Transaction History grid	Check no./date field	Gift record, Gift tab	The check number in Luminate Online appears in the Amount field of the Transaction History grid.
Amount field	Constituent profile, Transactions tab, Transaction History grid	Card type fields	Gift record, Gift tab	The credit card type in Luminate Online appears in the Amount field of the Transaction History grid.
Amount field	Constituent profile, Transactions tab, Transaction History grid	Amount field	Gift record, Gift tab	
Billing Street 1 field	Constituent profile, Interactions tab, donation record, Interaction Details	Address lines field	Constituent record, Bio 1 tab	
Billing Street 2 field	Constituent profile, Interactions tab, donation record, Interaction	Address lines field	Constituent record, Bio 1 tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	Details			
Billing City field	Constituent profile, Interactions tab, donation record, Interaction Details	City field	Constituent record, Bio 1 tab	
Billing State field	Constituent profile, Interactions tab, donation record, Interaction Details	State field	Constituent record, Bio 1 tab	
Billing Country field	Constituent profile, Interactions tab, donation record, Interaction Details	Country field	Constituent record, Bio 1 tab	
Billing ZIP/Postal Code field	Constituent profile, Interactions tab, donation record, Interaction Details	ZIP field	Constituent record, Bio 1 tab	
Transaction Receipt field	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt amt/no. field	Gift record, Gift tab	
Transaction Date field	Constituent profile, Transactions tab, Actions	Receipt field	Gift record, Gift tab	

Luminate Online Field	Luminate Online Location	The Raiser's Edge Field	The Raiser's Edge Location	Comments
	column, View Receipt			
Transaction Amount field	Constituent profile, Transactions tab, Actions column, View Receipt	Receipt amt/no. field	Gift record, Gift tab	
Name field	Setup, Receipt Manager	Receipt stack field	Gift record, Gift tab	In <i>Luminate Online</i> , the name of the receipt template you create maps to the Receipt Stack field in <i>The Raiser's Edge</i> . The Receipt Stack field is a Canadian-only field, and does not appear in United States databases.
		Tribute field	Gift record, Tribute tab	
		Tribute Type field	Gift record, Tribute tab	
		Tribute Description field	Gift record, Tribute tab	
		Tribute acknowledgee Name field	Gift record, Tribute tab, Tribute Gift record, Acknowledgees grid	
		Tribute acknowledgee Address lines field	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the tribute is added to <i>The Raiser's Edge</i> .
		Tribute acknowledgee City field	Individual Relationship record for tribute acknowledgee	To view acknowledgee address information, access the individual relationship record for the acknowledgee that is created when the trib-

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

How It Works

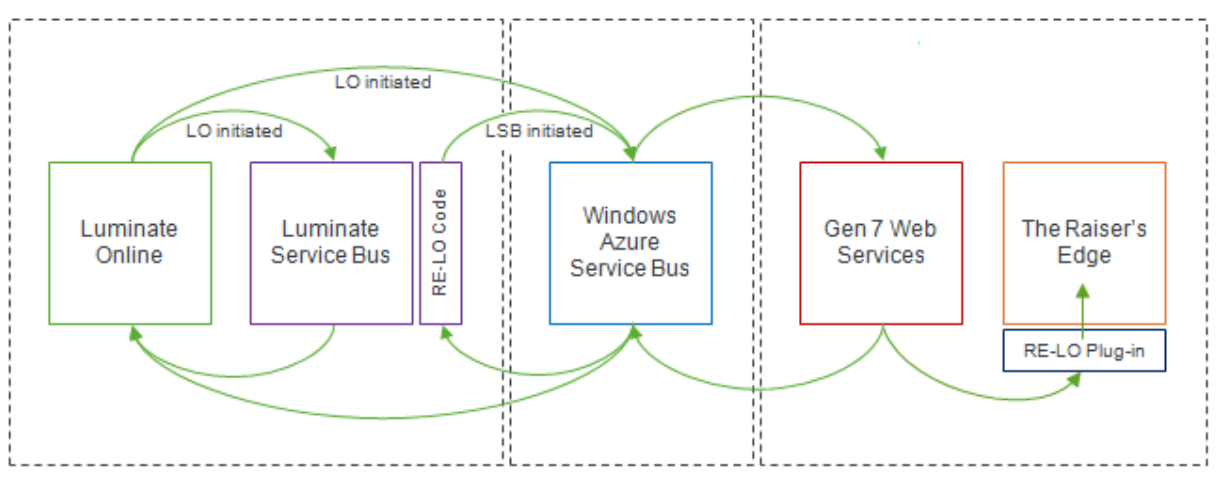
Luminate Online and **The Raiser's Edge** pass constituent and gift information back and forth with the help of the Luminate Service Bus, Microsoft Windows Azure Service Bus, and Blackbaud Web Services. When donations are accepted or when changes are made in **Luminate Online**, they are sent to the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

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

On-Premise Database

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

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



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

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

Blackbaud Hosted Database

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

