



How to Generate a Keytrack File for ScanStore

INTRODUCTION	2
EXPORT INFORMATION FROM THE RAISER'S EDGE FOR SCANSTORE	2
<i>Creating the Primary Keytrack Export File</i>	2
SUPPLEMENTARY FILES FOR SCANSTORE.....	7
<i>Supplementary file 1 – Optional (Secondary Reference Numbers)</i>	7
<i>Supplementary file 2 – Optional (Previous Address)</i>	7
<i>Supplementary file 3 – Optional (Previous/Alternate Bank Details)</i>	9
<i>Supplementary file 4 – Optional (Multiple Declarations)</i>	9
EXPORT FIELDS	11
<i>Primary Export File – Required</i>	11
<i>Secondary Unique Reference File – Optional</i>	12
<i>Previous/Additional Address File – Optional</i>	12
<i>Previous/Alternate Bank File – Optional</i>	13
<i>Multiple Declarations File – Optional</i>	14

Introduction

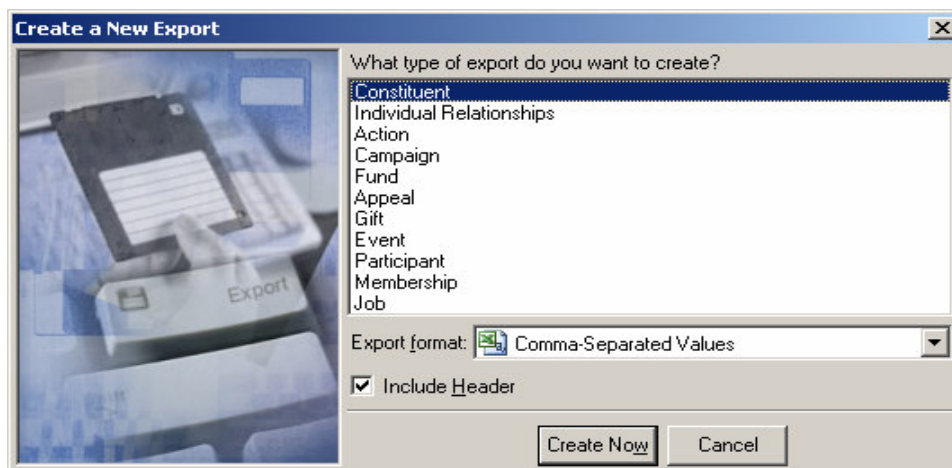
ScanStore requires a Keytrack file listing constituent information. The information can be generated and exported from within *The Raiser's Edge*. The preferred file format for the Keytrack file is Comma Separated Values (CSV). Our ability to correctly identify forms with a constituent increases with the more detail provided. The primary file is used for current information and the supplementary files are used for historical or additional information. It is important that the data we are indexing against contains the latest information in order to appropriately identify forms. This may require you to periodically send *ScanStore* an updated Keytrack file.

Export Information from The Raiser's Edge for ScanStore

The *Export* functionality in *The Raiser's Edge* extracts selected information from your database, allowing you to send the information to *ScanStore*. In *Export*, you determine the type of export you want to create, the format in which you want the data extracted, and the records and fields you want to include.

Creating the Primary Keytrack Export File

- 1) From the Export page in *The Raiser's Edge*, click **New Export**. The Create a New Export screen appears.



- 2) In the **What type of export do you want to create** box, select “Constituent”.
- 3) In the **Export format** field, select “Comma-Separated Values”.
- 4) Check **Include Header** if you want the first row of your export to contain the header names for the fields selected.
- 5) Click **Create Now**. The New Constituent Export record screen appears displaying the General tab.
- 6) On the General tab, click **Include** to select the specific records to include in the export. When sending records to *ScanStore*, you should select “All Records”. This creates an export file that includes all constituent records (individual and organisation) found in your database.

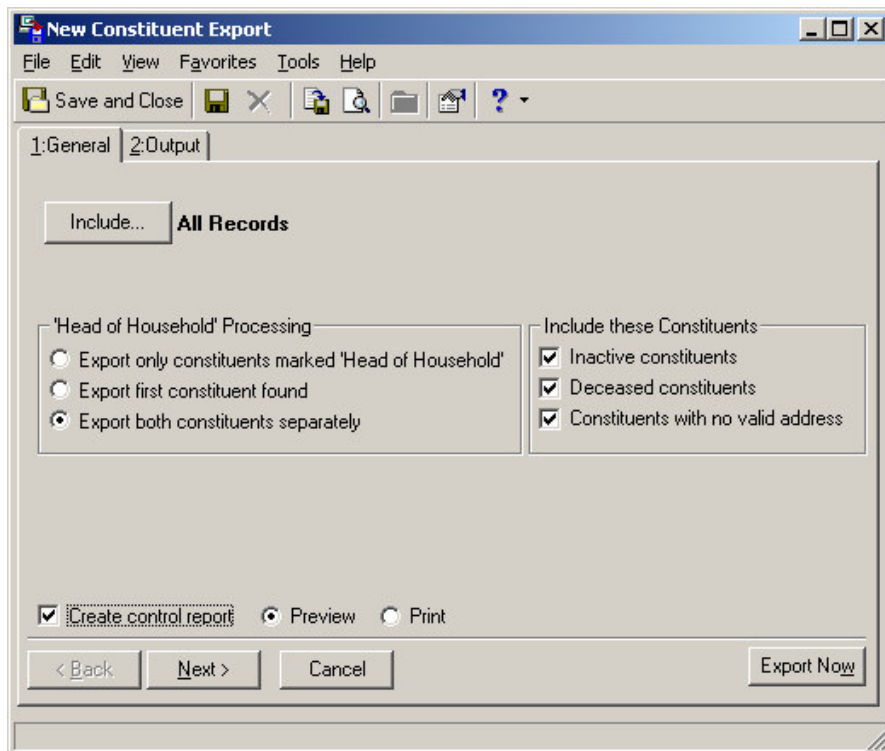
- 7) In the **'Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

In *Export* processing, "Head of Household" can determine who should be exported from a constituent record. For example, when you make a spouse a constituent in your database, or if the spouse is already a constituent in your database, a **"Head of Household"** checkbox appears on the General tab of the individual relationship record. If you do not check this checkbox for the spouse, the constituent on the Bio 1 tab is automatically "Head of Household". If you select **Export only constituent marked 'Head of Household'** on the General tab in Export, only the constituent marked Head of Household is selected for your export. If you select **Export first constituent found**, the first constituent found in the database exports.

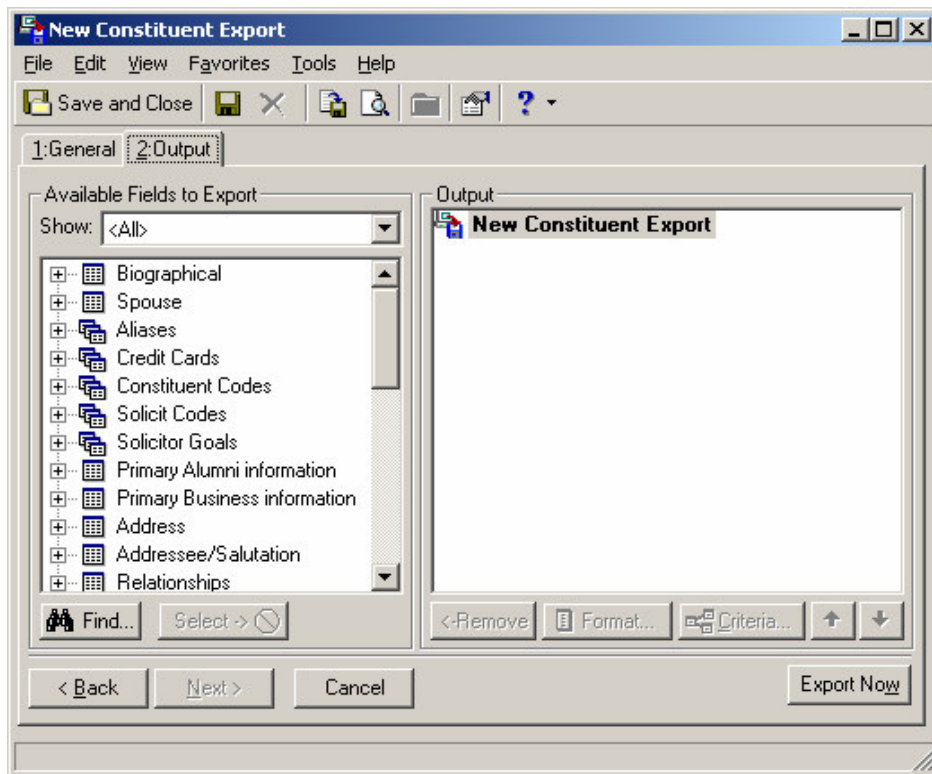
- 8) Check all the checkboxes in the **Include these Constituents** frame. You want to include inactive, deceased, and constituents with no valid address.

If you want to view a control report for the constituent export, mark the **Create control report** checkbox. A control report summarises the export's characteristics and field criteria. You can choose to **Preview** the report on your screen or **Print** a hardcopy.

When completed, the General tab should look similar to the following sample screen.



9) Select the Output tab.



10) In the **Show** field, confirm “<All>” is selected. This displays a complete list of available field categories.

11) Click the plus sign to the left of the Biographical group.

12) Include the following Biographical fields by double-clicking on the field name and moving it into the **Output** box. Make sure the fields appear in the order listed below.

- 1) System Record ID – An un-editable, unique database key
- 2) Primary Reference No – You select which field to use as your primary reference number. For example, you can use the constituent ID, Import ID, an attribute, etc. This is the unique identifier, typically used for mailings and to search for constituents in your database.
- 3) Key Indicator
- 4) Title 1
- 5) First name
- 6) Middle name
- 7) Surname
- 8) Deceased?
- 9) Org Name

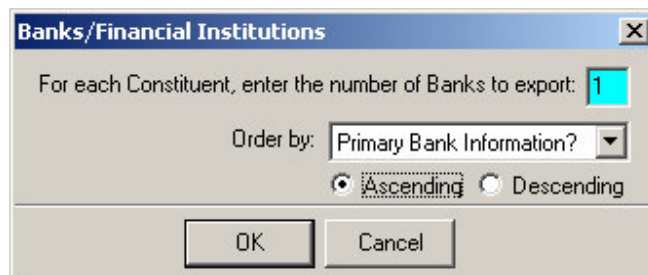
13) Click the plus sign to the left of the Address group. Expand the Preferred Address category.

- 14) Include the following Preferred Address fields by double-clicking on the field name and moving it into the **Output** box. Make sure the fields appear in the order listed below.
- 1) Address Line 1
 - 2) Address Line 2
 - 3) Address Line 3
 - 4) Address Line 4
 - 5) City
 - 6) County
 - 7) Postcode
 - 8) Country Long Description
- 15) Click the plus sign to the left of the Relationships group. Expand the Banks/Financial Institutions category.
- 16) Include the following Banks/Financial Institutions fields by double-clicking on the field name and moving it into the **Output** box. Make sure the fields appear in the order listed below. The bank information is optional, but useful to Blackbaud. Even though people move, they usually keep the same bank account. We are more likely to find an appropriate match using the bank information
- 1) Sort Code
 - 2) Account Number

Because constituents can have multiple bank relationships, the Bank/Financial Institutions screen appears after you select each field. On this screen, you select how many bank relationships you want to include in your export.

When selecting the bank data for the Primary Keytrack file, enter “1” in the **For each Constituent, enter the number of Banks to export field**, and select “Primary Bank Information?” in the **Order by** field.

When completed, the Banks/Financial Institutions screen should look similar to the following sample screen.



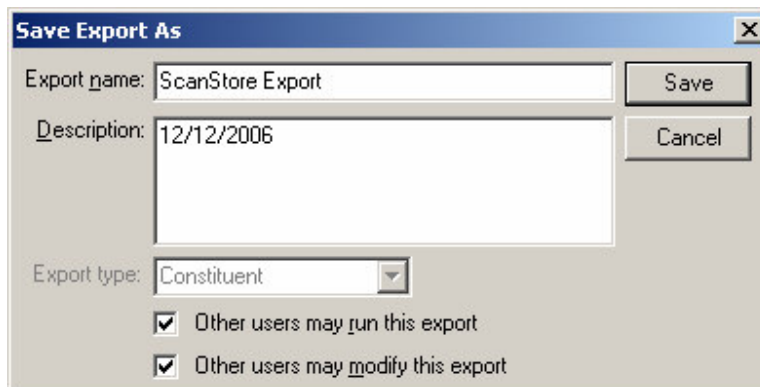
If you want to export multiple accounts, the bank details in the Primary Keytrack can be omitted and the supplementary Bank Keytrack supplied instead, as described in the Supplementary Files for ScanStore section below.

17) Continue adding fields from within the Biographical section or under the Declarations section depending on what version of *The Raisers' Edge* you are using. (see Note below)

- 1) Constituent pays tax
- 2) Declaration Indicator
- 3) Declaration Made
- 4) Declaration Start Date
- 5) Declaration End Date

Note: If you are working in *The Raiser's Edge 7.8* or higher, the declaration fields – Constituent pays tax, Declaration Indicator, Declaration Made, and Declaration start date – are included in the Declarations category. You must still include both fields in your export, but enter “1” when the Declarations screen appears, asking you to complete the **For each Constituent, enter the number of Declarations to export** field. If you want to include more than one declaration record, declarations should be included using a supplementary file and 99 records selected. For more information, see the Supplementary Files for ScanStore section in this document.

18) Once you complete the Output tab, select **File, Save**. The Save Export As screen appears.



19) Enter an **Export name** and **Description**. Remember, this export file will be reused for future updates to *ScanStore*.

20) Click **Save**.

21) On the export parameter screen, click **Export Now**. The Export file name screen appears.

22) Select the location where you want to store your export file and enter a **File name**.

23) Click **Save**. The program processes your export.

Supplementary Files for ScanStore

ScanStore's goal is to match or identify an image with a constituent in your database. The more information you provide us, the better chance we have of matching or identifying the constituent with the image. Therefore, we strongly suggest you include in your export file constituents' previous known addresses and banks, along with any other fields you may include on your mailings.

Warning: The procedure for exporting the Primary Keytrack file should be followed as indicated in the Creating the Primary Keytrack Export File section of this document. Supplementary data must reside in its own files. The primary keytrack file should have only a single record for each constituent. Separate supplementary files can be created using the same procedure and containing ONLY the supplementary data, which must always include the System Record ID.

Supplementary file 1 – Optional (Secondary Reference Numbers)

Secondary Reference Numbers are usually organization specific and may be used to track non-RE specific data. This field can be used for a variety of secondary unique reference numbers – such as URN's from previous legacy databases or URN's captured by 3rd parties such as Fulfillment houses, telemarketing companies, or face to face fundraising that generate their own URN. This information could be tracked in Import ID, specific attributes, or other fields that track unique constituent information. In order to provide a supplementary file, complete the General tab following steps 1 through 9 as described in the Creating a Primary Keytrack Export File section. When completing the Output tab, also follow the steps included in the Creating a Primary Keytrack Export File section, but add System Record ID from the Biographical category and then add as many fields as you want that may have been used as constituent identifiers on your forms in the past.

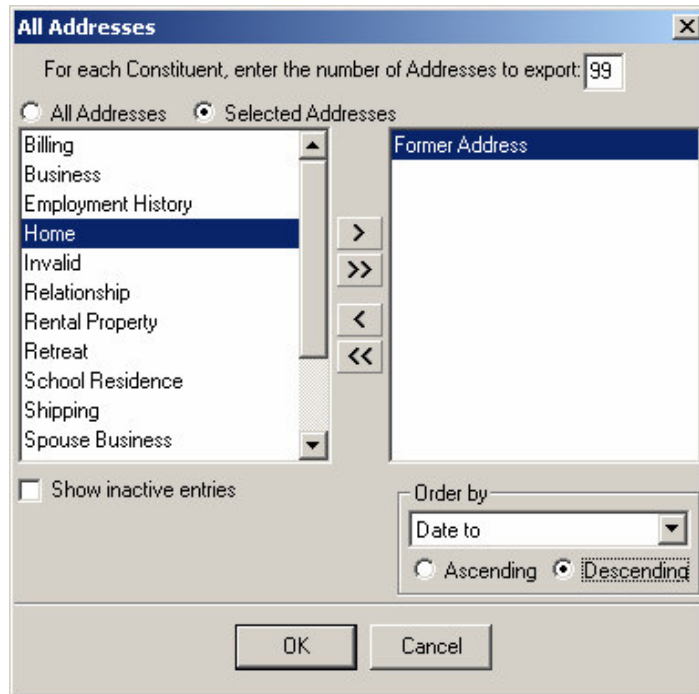
Supplementary file 2 – Optional (Previous Address)

Data inclusion on Address Keytrack:

Previous addresses could represent a previous living address in which a gift aid declaration form was sent to and returned. In order to provide a supplementary file, complete the General tab following steps 1 through 9 as described in the Creating a Primary Keytrack Export File section. When completing the Output tab, also follow the steps included in the Creating a Primary Keytrack Export File section, but include the necessary additional fields by completing the following procedure:

- a) In the **Available Fields to Export** frame, browse to Addresses, All Addresses and select System Record ID. The All Addresses screen appears. Because addresses are a one-to many criteria option you must select addresses to export.
- b) In the **For each Constituent, enter the number of Addresses to export** field, enter the number of addresses you want to include in your export file. You can include up to 99 addresses, giving *ScanStore* the widest range for finding matches.
- c) Select **Selected Address**.
- d) Using the arrow keys, move Former Address or Previous Address (whichever your organisation uses to record this data) from the box on the left side of the screen into the box on the right.

- e) In the **Order by** field, select “Date To” and select **Descending** to export the last previous address. The screen should look similar to the following sample screen:



NOTE: A One-to-Many criteria group is composed of fields for which several values exist in your database. For example, the Address group is a One-to-Many criteria group because each constituent record can be associated with more than one address.

NOTE: To maintain accurate data it is advised that the **Address Type** for old addresses which are retained for record is consistent throughout your organisation. It is also advised that the **Date To** field on said addresses is populated to allow accurate export selection of the last former address.

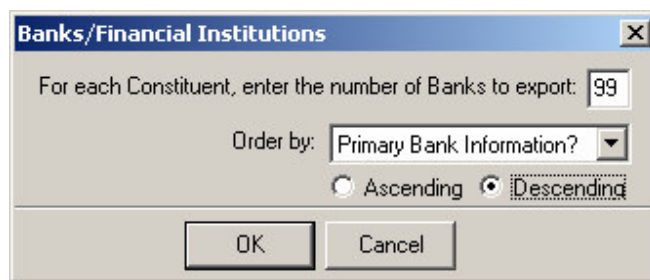
- f) Click **OK**.
- g) Add the remaining Previous Address Fields
- 1) Address Line 1
 - 2) Address Line 2
 - 3) Address Line 3
 - 4) Address Line 4
 - 5) City
 - 6) County
 - 7) Postcode
 - 8) Country
 - 9) Date to

Supplementary file 3 – Optional (Previous/Alternate Bank Details)

Data inclusion on Bank Keytrack:

Previous bank details could represent a previous bank in which a donation or direct debit was processed. In order to provide a supplementary file, complete the General tab following steps 1 through 9 as described in the Creating a Primary Keytrack Export File section. When completing the Output tab, also follow the steps included in the Creating a Primary Keytrack Export File section, but include the necessary additional fields by completing the following procedure:

- a) In the **Available Fields to Export** frame, browse to Relationships, Banks/Financial Institutions, and select System Record ID. The Bank/Financial Institutions screen appears. Because banks are a one-to many criteria option you must select which banks to export.
- b) In the **For each Constituent, enter the number of Banks to export** field, enter the number of banks you want to include in your export file. You can include up to 99 banks, giving *ScanStore* the widest range for finding matches.
- c) In the **Order by** field, select “Primary Bank Information?” and select **Descending** to export the Primary Bank first, followed by the rest. The screen should look similar to the following sample screen:



- d) Click **OK**.
- e) Add the remaining Bank Fields
 - 1) Sort Code
 - 2) Account Number

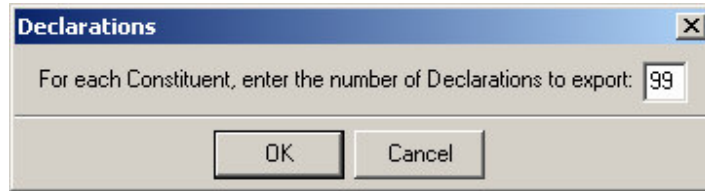
Supplementary file 4 – Optional (Multiple Declarations)

The Raiser's Edge 7.78 gives you the ability to track multiple gift aid declarations per constituent. However a sort field is unavailable when selecting fields from the Declarations category. If you export one declaration field out of *The Raiser's Edge*, you could get any type of declaration regardless of when it was made. It may be the first one or it may be the last one.

In order to ensure we are accurately checking against valid date ranges, you may want to provide us all declarations by completing the following procedure:

- a) In the **Available Fields to Export** frame, browse to Declarations, and select System Record ID, Constituent pays tax, Declaration Indicator, Declaration made, Declaration start date, and Declaration end date. If you are working in *The Raiser's Edge 7.71* or lower, these fields are located in the Biographical category.

- b) In the **For each Constituent, enter the number of Declarations to export** field, you can enter up to 99 records to export. The screen should look similar to the following sample screen:



The image shows a standard Windows-style dialog box titled "Declarations". The dialog has a blue title bar with a close button (X) on the right. The main area contains the text "For each Constituent, enter the number of Declarations to export:" followed by a text input field containing the number "99". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- c) Click **OK**. When *ScanStore* imports the file, only the Tax payer status at the latest Declaration made is used.

Export Fields

Primary Export File – Required

Field	Description	Required	RE Source	RE Header
Database key	This must be the unique and non-changeable record identifier from your database.	Y	Biographical\System Record ID	CnBio_System_ID
Primary reference	You select which field to use as your primary reference number. For example, you can use the constituent ID, Import ID, an attribute, etc. This is the unique identifier, typically used for mailings and to search for constituents in your database.	Y	Biographical\ID?	CnBio_ID
Individual/Org Indicator	I = Individual O = Org	Y	Biographical\Key Indicator	CnBio_Key_Indicator
Title	Only used for Individuals	Y	Biographical\Title 1	CnBio_Title_1
First name	Only used for Orgs	Y	Biographical\ First Name	CnBio_First_Name
Middle name		Y	Biographical\Middle Name	CnBio_Middle_Name
Last name		Y	Biographical\Surname	CnBio_Surname
Deceased Indicator		Y	Biographical\Deceased?	CnBio_Deceased
Org Name		Y	Biographical\Org Name	CnBio_Org_Name
Preferred or Primary Address Line 1		Y	Address\Preferred Address\Address line 1	CnAdrPrf_Addrline1
Preferred or Primary Address Line 2		Y	Address\Preferred Address\ Address line 2	CnAdrPrf_Addrline2
Preferred or Primary Address Line 3		Y	Address\Preferred Address\ Address line 3	CnAdrPrf_Addrline3
Preferred or Primary Address Line 4		Y	Address\Preferred Address\ Address line 4	CnAdrPrf_Addrline4
Preferred or Primary City		Y	Address\Preferred Address\City	CnAdrPrf_City
Preferred or Primary County		Y	Address\Preferred Address\County	CnAdrPrf_County
Preferred or Primary Postal Code		Y	Address\Preferred Address\Postcode	CnAdrPrf_Postcode
Preferred or Primary Country		Y	Address\Preferred Address\Country Long Description	CnAdrPrf_ContryLongD scription
Primary Bank Sort Code	Optional if you are uncomfortable with sending such details;	N	Relationships\Banks/Financial Institutions\Sort Code	CnRelBnk_1_01_Sort_C ode

	however the information improves your chances for a correct match. If you want to export multiple accounts, the bank details in the Primary Keytrack can be omitted and the supplementary Bank Keytrack supplied instead			
Primary Bank Account Number	Written, Oral, etc.	N	Relationships\Banks/Financial Institutions\Account number	CnRelBnk_1_01_Account_number
Constituent Pays Tax	Yes/No field	Y	Declarations\Constituent Pays Tax	CnDecs_1_01_Constituent_Pays_Tax
Declaration Indicator	Written, Oral, etc. Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration Indicator	CnDecs_1_01_Declaration_Indicator
Declaration Made	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration made	CnDecs_1_01_Declaration_Made
Declaration Start Date	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration Start Date	CnDecs_1_01_Declaration_Start_Date
Declaration End Date	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration End Date	CnDecs_1_01_Declaration_End_Date

Secondary Unique Reference File – Optional

Should specify 1 to n alternate fields to use that may have been used on non-RE, e.g. mailing house, generated forms. These fields could represent Import ID, specific attributes, or other fields that track unique constituent information.

Field	Description	Required	RE Source	RE Header
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y	Biographical\System Record ID	CnBio_System_ID
URN1		Y	?	?
URN2		N/A	?	?
...		N/A	?	?
URNn		N/A	?	?

Previous/Additional Address File – Optional

Field	Description	Required	RE Source	RE Header
Database key	This is the pointer back to	Y	Biographical\System Record ID	CnBio_System_ID

	the unique and non-changeable constituent record identifier.			
Previous or Additional Address Line 1		Y	Addresses\All Addresses\Address line 1	CnAdrAll_1_01_Addrline1
Previous or Additional Address Line 2		Y	Addresses\All Addresses\Address line 2	CnAdrAll_1_01_Addrline2
Previous or Additional Address Line 3		Y	Addresses\All Addresses\Address line 3	CnAdrAll_1_01_Addrline3
Previous or Additional Address Line 4		Y	Addresses\All Addresses\Address line 4	CnAdrAll_1_01_Addrline4
Previous or Additional City		Y	Addresses\All Addresses\City	CnAdrAll_1_01_City
Previous or Additional County		Y	Addresses\All Addresses\County	CnAdrAll_1_01_County
Previous or Additional Postal Code		Y	Addresses\All Addresses\Postcode	CnAdrAll_1_01_Postcode
Previous or Additional Country		Y	Addresses\All Addresses\Country Long Description	CnAdrAll_1_01_ContryLongDscription
Previous or Additional Address Valid To Date		N	Addresses\All Addresses\Date to	CnAdrAll_1_01_Date_To

Previous/Alternate Bank File – Optional

Field	Description	Required	RE Source	RE Header
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y	Biographical\System Record ID	CnBio_System_ID
Previous or		Y	Relationships\Banks/Financial Institutions\Sort Code	CnRelBnk_1_01_Sort_Code

Alternate Bank Sort Code				
Previous or Alternate Bank Account Number		Y	Relationships\Banks/Financial Institutions\Account number	CnRelBnk_1_01_Account_number

Multiple Declarations File – Optional

Field	Description	Required	RE Source	RE Header
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y	Biographical\System Record ID	CnBio_System_ID
Constituent pays Tax	Yes/No field	Y	Declarations\Tax payer status	CnDecs_1_01_Tax_payer_status
Indicator	Written, Oral, etc.	Y		CnDecs_1_01_Declaration_Indicator
Declaration Made	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration made	CnDecs_1_01_Declaration_Made
Declaration Start Date	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration Start Date	CnDecs_1_01_Declaration_Start_Date
Declaration End Date	Although optional, the information should be provided if it has been tracked.	Y	Declarations\Declaration End Date	CnDecs_1_01_Declaration_End_Date

