Allegiance Fundraising V 9.2

WealthEngine Interface User Guide

Introduction to Allegiance’s WealthEngine Interface

Allegiance has partnered with WealthEngine to bring to our clients access to WealthEngine’s comprehensive wealth identification, wealth intelligence, and prospect research solution across four key areas: analytics, research, prospecting, and consulting.

The foundation for WealthEngine’s solution is FindWealth Online, their wealth intelligence platform that brings comprehensive insight into the wealth and lifestyle of your donors and prospects.

With this partnership, Allegiance offers their clients the ability to access this online information and then append that information into their Allegiance database. This can be done one selected record at a time or by importing a selected file of multiple donors from the Allegiance database.

Getting Started with WealthEngine

You will need to contact WealthEngine and set up an account with them. They will give you a user ID and password to access their website.

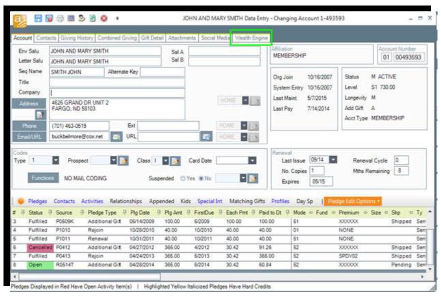
Once you have your account set up with WealthEngine you will then need to call the Allegiance Support line (877-858-7654) to have the WealthEngine interface activated in your database. This must be done by Allegiance as activation happens in a secure area of your database; while there the Allegiance Support Rep will also need to set up a WealthEngine *Gateway Record*. Please have the username and password that WealthEngine gave you handy to make setting up the gateway faster when you call. Once this process is complete, the WealthEngine tabs that had been grayed out will now be accessible.

Locating WealthEngine Information in Allegiance

WealthEngine information is stored in the Allegiance Database on the *People Record*. You can view that information from either the *Account Record* or the *People Record* via the *WealthEngine* tab. Both of these are explained below.

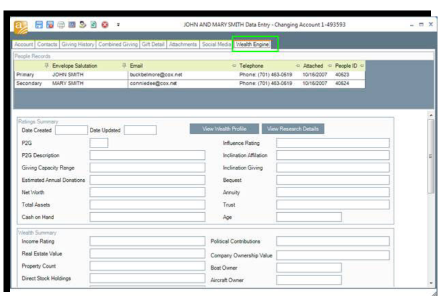
Accessing WealthEngine from an Account Record

Once the *Account Record* is open, click on the *WealthEngine* tab at the top of the screen to view the WealthEngine information for that *Account*, as indicated below.



WealthEngine Record from the Account Record

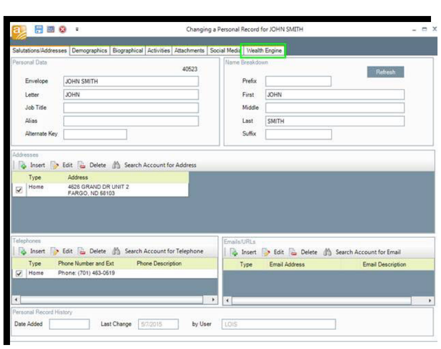
The screen below shows all of the fields that are available when you append data from WealthEngine. The returned information comes in codes (which will be visible in a later section of this document), but once it is imported into Allegiance those codes are displayed here with a description and the returned data.



Note: You cannot enter information into these fields via *Data Entry*. These fields can only be populated via a WealthEngine upload or by the single record upload in Allegiance.

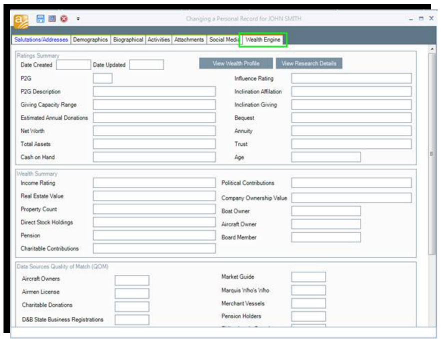
Accessing WealthEngine from a People Record

When in an open *People Record*, click on the *WealthEngine Tab* to view the WealthEngine information.



WealthEngine Record from the People Record

Shown below is how the WealthEngine information is displayed on a donor's *Person Record*, as you can see it is the same layout of fields as above (when accessing the information from the *Account Record*).



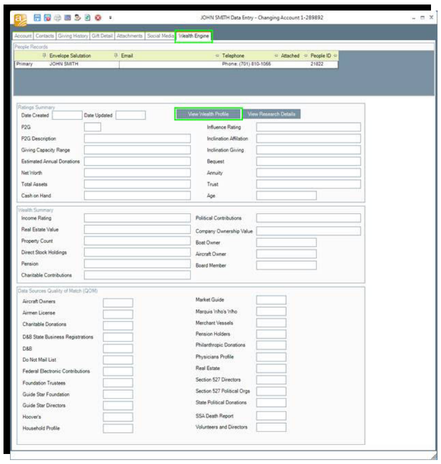
Note: <u>You cannot enter information into these fields via *Data Entry*</u>. These fields can only be populated via a WealthEngine upload or by the single record upload in Allegiance.

Working with WealthEngine on a Single Record

From an individual donor's WealthEngine tab you have three options in working with the WealthEngine data: View Wealth Profile, View Research Details, and Remove Wealth Profile.

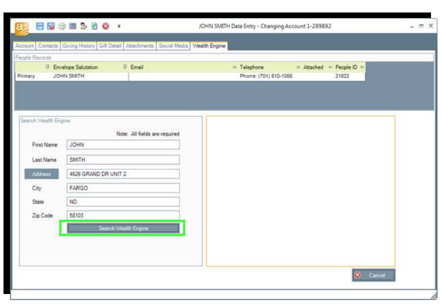
Viewing a Donor's Wealth Profile

Go to either the *Account Record* or *People Record* and click on the *WealthEngine* tab within the donor's record; from there click on the *View Wealth Profile* button (outlined in green below).

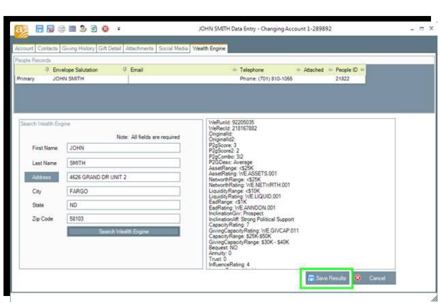


View Wealth Profile sends the donor's name and address parameters to WealthEngine and WealthEngine returns with data that matches those parameters.

The Search *WealthEngine* window will open (shown below) from there click on the *Search WealthEngine* button (outlined in green below).



Once the information is retrieved, that information will appear in the right-most window in a scripted format (as shown below).

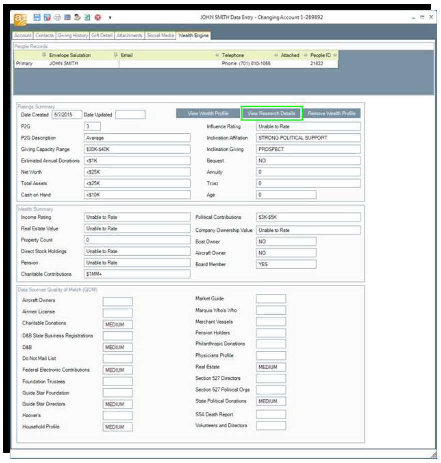


After reviewing the information in the pane on the right, click *Save Results* to keep it and append it to this donor's *People Record*, or *Cancel* it without saving the information.

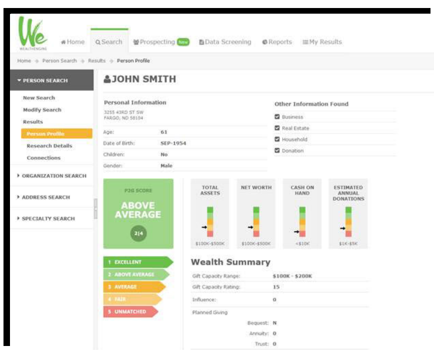
Saving the information will update the *Journal Records*, and return you to the *WealthEngine* tab on the *People Record*. Any data that was returned will now be populated on this screen.

Adding WealthEngine Information to a Single Record

If you wish to save the returned results from this search click on the *Save Results* button (outlined in green above). The returned information will now be populated on the Allegiance *WealthEngine* tab of their account, as shown below.

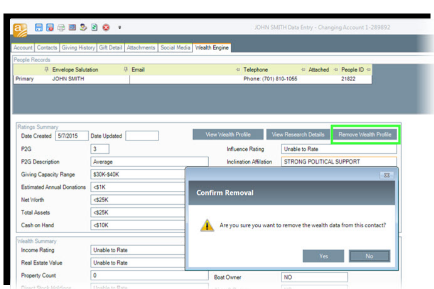


Clicking the *View Research Details* button (outlined in green above) will launch a browser and take you to WealthEngine's website where you will be able to view additional information about this donor. An example of WealthEngine's Person Profile page is shown below.



Deleting WealthEngine Information from a Single Record

To remove the WealthEngine information from a *Person Record*, click on the *Remove Wealth Profile* button (outlined in green below). A *Confirm Removal* window will pop asking you if you are sure you want to remove the information. If you are sure, click *Yes*. If you don't wish to remove the profile info click *No*.

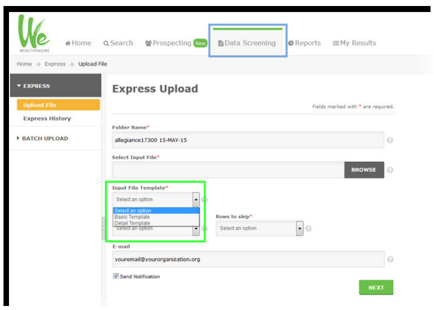


Creating a File for a Data Screening Batch in WealthEngine

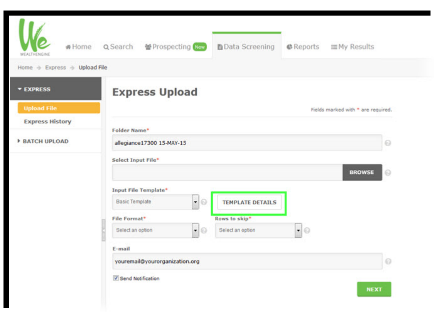
In order to send a batch of records to WealthEngine for their Data Screening process, you will first need to create a download file of the accounts for which you'd like to get profile information. Allegiance recommends that you use either *SQL Query, Major Donor Function*, or *Miscellaneous Contact Function.* All of these Functions are in the On *Demand Menu* of the Allegiance Main Menu. Use a DOWN *Media* when creating the file.

Before downloading the information from Allegiance, be sure to review the two formats WealthEngine has for you to use as you map your data.

WealthEngine has two formats, a BASIC format and a DETAIL format. Log into the WealthEngine site and go to Data Screening > Express > Upload File, as outlined below in blue.



Input File Templates will allow you to choose either the *Basic* or *Detail Template* (outlined in green above). After you choose your template it will show you a button that says *Template Details* immediately to the right (outlined in green below) of the drop-down menu.



Click the *Template Details* button to open a chart showing the fields required for the template you've chosen. Allegiance strongly encourages you to print out the page of required fields and save it for future reference.

Below is an example of the fields to download, in the order that they appear on the Basic Template.

It is required that the *PeopleID* (Field Number 4270) is part of the file you are downloading. This will be how Allegiance identifies which *People Record* the WealthEngine data is appended to.

Presets .. Current Working Se Download Sets Clear Fields

Drag To Trash to Delete Selected Fields

Field Name	Field Description	Type	Num	Len / #Items
PeopleID	People ID	CNT	4270	
Prefix	Prefix	A/N	4263	
FirstName	First Name	A/N	4246	
MiddleName	Middle Name	A/N	4257	
LastName	Last Name	A/N	4254	
Suffix	Suffix	A/N	4266	
Addr1	Address Line 1	A/N	4008	
Addr	Address Line 2	A/N	4009	
City	City	A/N	90	
StateProv	State or Province	A/N	23	
USZipCode	Zip Code US 5 digit	A/N	24	
TotLifetimeGiving	Total Lifetime Giving Amount	AMT	225	
NumRenlPlgs	Number of Renewal Pledges	CNT	232	
TotNumGifts	Total Number of Gifts	CNT	1001	
LastRenlAmt	Last Renewal Amount	AMT	208	
LastRenlDate	Last Renewal Month/Year	M/Y	207	
HighestPlgAmt	Highest Pledge Amount	AMT	220	
HighestPlgDate	Highest Pledge Month/Year	M/Y	219	

Use the information from the *Template Details* chart to select all the required fields for that template to be included in your DOWN *Media*. There are some fields that are optional.

Below is a cross-listing of *Download Fields* in Allegiance as matched to as many fields as possible from WealthEngine's Basic Template.

Column on Excel Spreadsheet Once Downloaded	Allegiance Download Field Number	Allegiance Download Field Description	WealthEngine Input Field	WealthEngine's Field Description
A	4270	People ID	User Supplied ID	This field is only used for integrating the results data back into your DMS / CRM system.
B	4263	Prefix	Prefix	Optional field
C	4246	First Name	First Name[1]	Required field
D	4257	Middle Name	Middle Name or Initial[2]	Optional field which can improve your match results.
E	4254	Last Name	Last Name[1]	Required field
F	4266	Suffix	Suffix	Optional field
G	4008	Address Line 1	Primary Address Line 1[1]	Required field
H	4009	Address Line 2	Primary Address Line [2]	Optional field
I	90	City	Primary Address City[1]	Required field
J	23	State or Province	Primary Address State[1]	Required field -- 2 digit state code only
K	24	Zip Code (5-digit)	Primary Address Zip[1]	Required field -- 5 digit zip code only
L	225	Total Lifetime Giving Amount	Total Giving[3]	Total dollar amount of gifts given to your organization, e.g. lifetime giving.
M	232	Number of Renewal Pledges	Years Giving[3]	The number of years an individual has given to your organization, e.g. lifetime giving years.
N	1001	Total Number of Gifts	Number of Gifts[3]	Total number of gifts given to your organization.
O	208	Last Renewal Amount	Last Gift Amount[3]	The dollar amount of the last gift given to your organization.
P	207	Last Renewal Month/Year	Last Gift Date[3]	The date of the last gift given to your organization.
Q	220	Highest Pledge Amount	Largest Gift Amount[3]	The dollar amount of the largest gift given to your organization.
R	219	Highest Pledge Month/Year	Largest Gift Date[3]	Date of the largest gift to your organization.

Image is continued on next page …

Column on Excel Spreadsheet Once Downloaded	Allegiance Download Field Number	Allegiance Download Field Description	WealthEngine Input Field	WealthEngine's Field Description
U			Attribute 1	Optional field
V			Attribute 2	Optional field
W			Attribute 3	Optional field
X			Attribute 4	Optional field
Y			Attribute 5	Optional field
			Additional Notes:	
			****** = only required if you want to integrate results into your DMS / CRM.* *1 = Required fields.* *2 = Optional fields which can improve match results.* *3 = Optional fields which can improve Estimated Giving Capacity score and is used to calculate the Inclination Giving score.*	

IMPORTANT: the layout of your Excel Spreadsheet is crucial to a successful upload to WealthEngine!

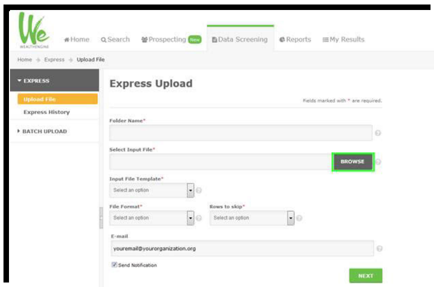
The *Basic Template* from WealthEngine has more fields/columns than will download using the fields above. You will need to manually add columns to your Excel spreadsheet to match the number of columns that WealthEngine requires. (For example, the *Basic Template* has columns A-Y on it, so the spreadsheet you create also has to have columns A-Y.)

Columns U-Y on the spreadsheet you download from Allegiance will have no data. Add the WealthEngine Input fields from the chart above as the column headers for columns U-Y and leave the cells in those columns blank. The amount of columns just has to match what WealthEngine is asking for, they do not need to contain data.

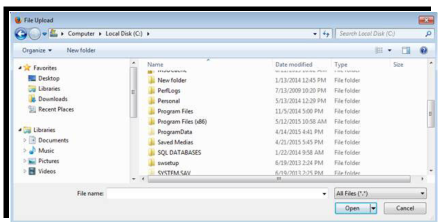
Prior to doing the upload, make sure your data has no commas in it if you are sending a CSV file. Believe it or not, a name like Charles Wallace, III can cause major headaches when trying to work with a CSV file because of the comma between ‘Wallace’ and ‘III.’ To avoid problems you could save your Excel file as a tab delimited (.txt) file, either file format works with WealthEngine.

Once you have a file that matches their template then you are ready to do the Express Upload.

On the Express Upload screen, click on the *Browse* button to select the .txt or .csv file that you’d like to upload.

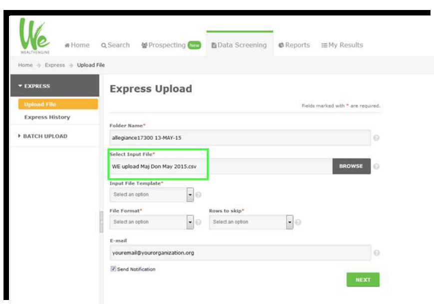


A *File Upload* window will open (yours may look a bit different depending on the browser you are using):

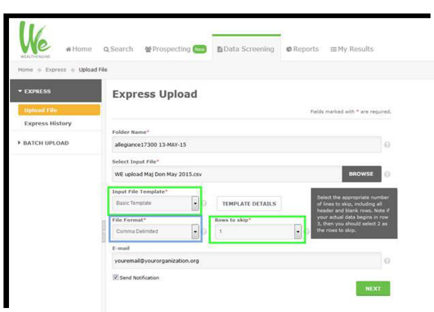


Navigate to the location on your computer/server that your file is saved, and double-click it.

The file will now appear in the Select Input File box, as shown below.



Set the Input File Template to whichever you have chosen to use, above I used the example of the Basic Template so I’ll use that again here (outlined in green below).



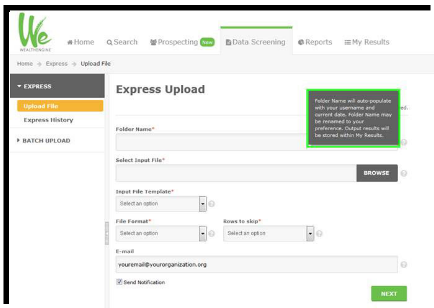
Because I’ve created my upload file as a .csv, I select *Comma Delimited* from the File Format drop-down (outlined in blue above).

The first row of your file should have column headers so you will need to tell WealthEngine to skip at least the first row. More information can be seen in the help information to the right of the

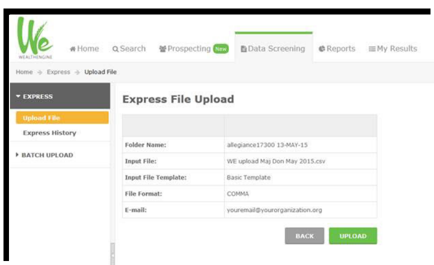
Rows to Skip field above.

If you wish to receive an email notification when your file has finished processing, enter your email address in the field (once you enter an email address, the Send Notification box will automatically check itself). You will also receive an email notifying you when the file is initially received at WealthEngine.

Going back to the Folder Name field at the top of the screen, once you click Next WealthEngine will automatically assign the Folder Name per the information outlined in green below. Of course you can enter in a Folder Name of your choosing as well.



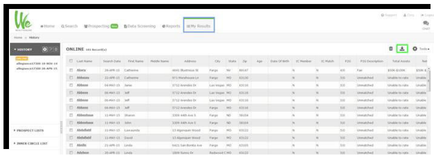
Click the *Next* button to verify your information per the screen pictured below.



Click *Upload* to upload your file to WealthEngine.

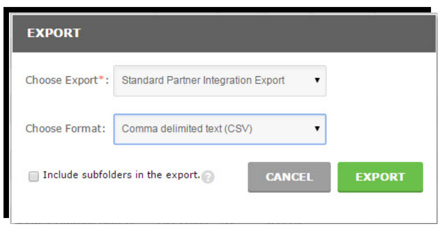
Exporting Data from WealthEngine Site

After receiving the email from WealthEngine that says your data is ready, log into the WealthEngine client site and click on My Results. A sample of an export file is shown below.



Click on the export icon to the far right, outlined in green above, to begin exporting the WealthEngine data.

When this window appears, select the Standard Partner Integration Export and choose either CSV or Tab Delimited Format in the second box. <u>Do not choose Excel format.</u> Click Export to begin.

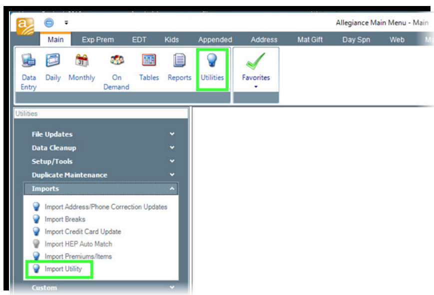


Each person’s computer is set up to handled downloaded files differently, locate your downloaded file and save it to a safe location.

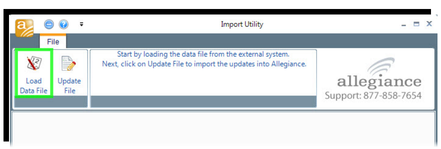
Using the Import Utility to Append your WealthEngine Information

Use the *Import Utility* tool to import the WealthEngine Profile information back into the Allegiance database.

This tool can be found from the Allegiance Main Menu > *Utilities* > *Imports* > *Import Utility*. If you would like to view some step-by-step examples of using the *Import Utility*, there is a webinar recording on our website titled *Import Utility*. While the examples are not specific to importing WealthEngine data, the webinar does discuss how to map fields and the process that the *Utility* goes through.



The *Import Utility* window will open, from here click on *Load Data File*.

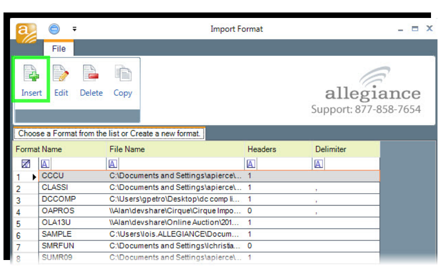


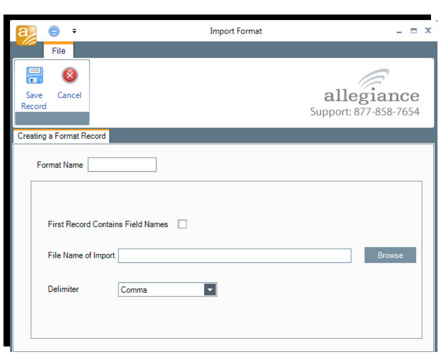
Appending WealthEngine Data into Allegiance for the First Time

If you've appended WealthEngine data before, skip to the next section of this document.

If you haven't or if you changed from WealthEngine's Basic to the Detail Template (or vice versa) please continue with this section.

The first time you upload information returned from WealthEngine you'll need to create a new format for importing. To do that, click on *Insert*.





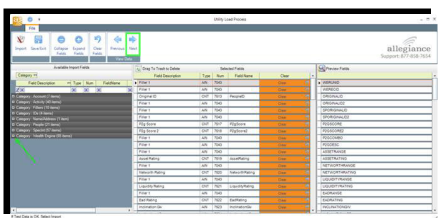
Format Name: use this field to give your import format a name (perhaps WEALTH). The name can be up to six alphanumeric characters and should be recognizable to other Allegiance Users.

First Record Contains Field Names checkbox: if the file you are importing has column headers, check this box. (Files returned from WealthEngine have column headers.)

File Name of Import: Use the *Browse* button to the right to locate the file you are uploading on your computer/server. (This process will be nearly identical to how you uploaded the original file to WealthEngine as described above.)

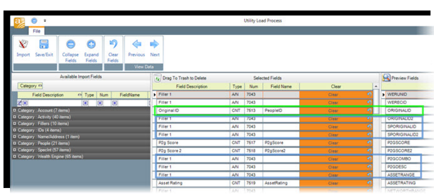
Delimiter: use the drop-down menu to select the field delimiter that was used to create the file. If the file has an extension of .csv then select *Comma*, if your file has the extension .txt then select *Tab*.

Once you've completed these fields, click *Save Record* at the top of the window. The *Utility Load Process* window will open. Here you will map the fields in your file. Good news, you should only have to do this once for WealthEngine (possibly twice if you use both the Basic and the Detail Template—which if you do, be sure that your *Format Name* on the screen above clearly identifies which is which!).



Click on the *Next* arrow to show the WealthEngine file field headers (outlined in green above).

Notice that the green arrow above is pointing at new WealthEngine fields to use when doing your import, click on the little plus sign to expand the list of fields.



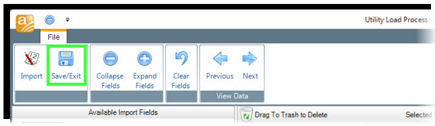
Some helpful hints:

The 3rd row in the file is the *Original ID* (outlined in green above), and this is how Allegiance will know to which *People Record* the WealthEngine data should be appended.

Make the fields description match the WealthEngine file fields as best you can, if it doesn't match exactly put in a *Filler* field. You will use a lot of *Filler* fields!! (Multiple *Filler* fields are outlined in blue above.) In fact, a good rule of thumb is to use a *Filler* field when the WealthEngine field ends with the word 'RANGE.' (Their RANGE fields are hard-coded in Allegiance as the fields on the WealthEngine tab, so using *Filler* is ok. The fields that end in 'RATING' should have *Import Fields* in Allegiance that can be matched up because their RATING fields are the data that populates the fields in Allegiance.)

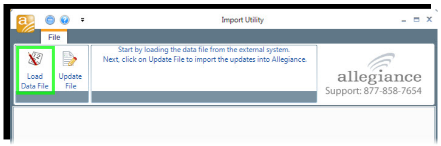
There are a lot of fields to match up! Take the time and try to do this when you won't be interrupted. If you get it right the first time, and save it, you shouldn't have to do it again!

Once you are satisfied with how the fields are matched up, click on *Save/Exit* to save the *Format Parameters Setup*. By clicking *Save/Exit* now you shouldn't have to re-map all of these fields again for WealthEngine.

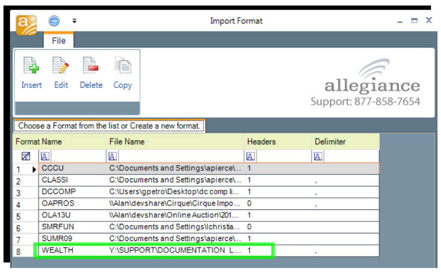


You will be returned to the *Import Utility* screen.

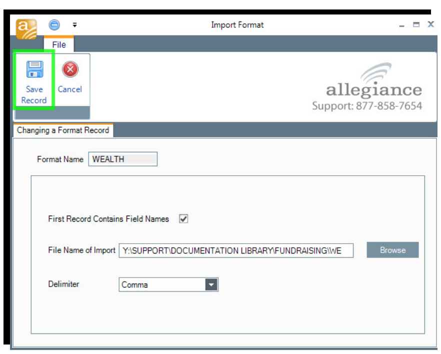
Click on *Load Data File* again (trust me).



Select your WEALTH Format (or whatever you named it) by double clicking on it (example outlined in green below).

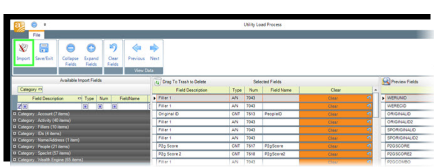


When the *Import Format* screen opens, click *Save Record*.

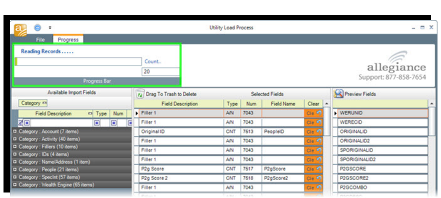


The *Utility Load Process* screen will open and your fields will already be mapped (because you clicked *Save/Exit* once you got all of those fields lined up earlier).

Click *Import*.

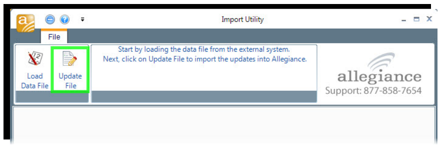


As the *Utility* begins to load the data into Allegiance, you'll see the *Progress Bar* at the top of the screen advance and the *Count* increase.

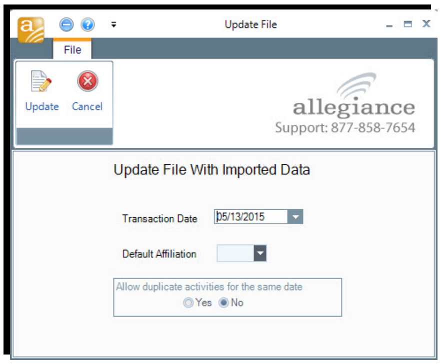


Once complete you will be returned to the *Import Utility* screen. The data is loaded into Allegiance at this point but it is not yet appended to the records.

Click *Update File* (as outlined below) to begin the process of appending the WealthEngine data to the records.



The *Update File* screen will open, as shown below.



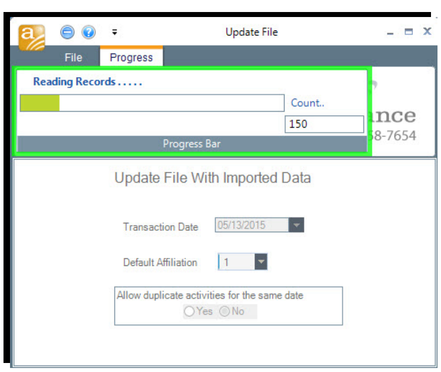
Complete the fields shown above.

Transaction Date: this will default to the current date. You can change it by keying in a different date or using the drop-down arrow to select a date from a calendar.

Default Affiliation: (required) even though the WealthEngine data is appended to the *People Record*, you must select an *Affiliation* from this drop-down.

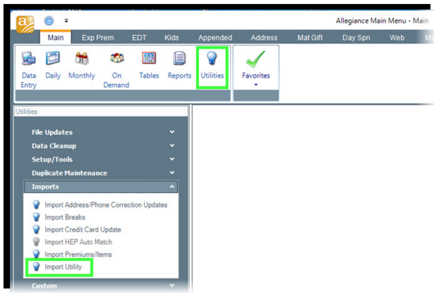
Allow Duplicate Activities for the Same Date: you'll likely have *No* selected when you do WealthEngine imports because it is doubtful you'll do more than one import from WealthEngine in a day. If you should do more than one in a day, however, then click *Yes*.

Click the *Update* button at the top of the screen when the fields are filled in. As the files are being updated you'll see a progress bar advance and the count tick upwards.

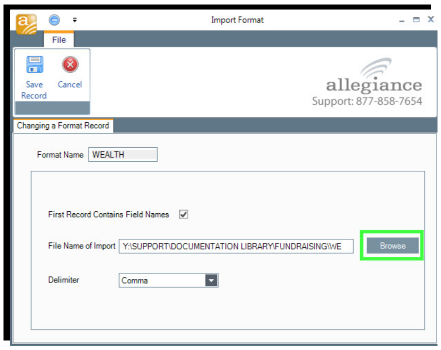


Appending WealthEngine Data into Allegiance Subsequent Times

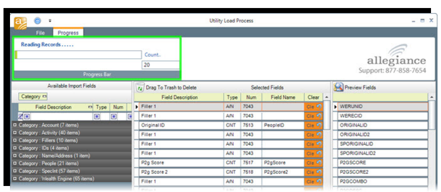
Begin by opening the *Import Utility* found on the Allegiance Main Menu. Click the *Utilities* menu, then use the drop down to open the *Imports* menu, and select *Import Utility*.

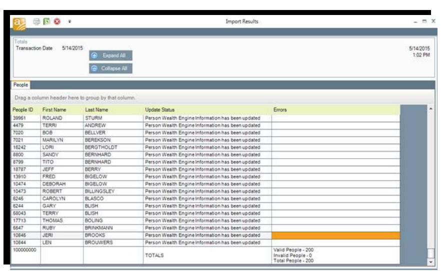


When the *Import Utility* screen opens, click on *Load Data File*.

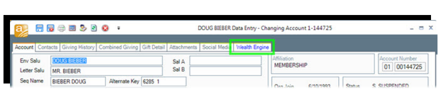


Select your WEALTH Format (or whatever you named it) by double clicking on it (example outlined in green below).

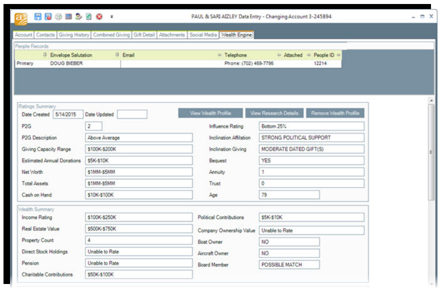




When the *Import Format* screen opens, you'll need to add your most recent data file from WealthEngine. Use the *Browse* button (outlined in green below) to locate the file you are uploading on your computer/server. (This process will be nearly identical to how you uploaded the original file to WealthEngine as described above.)



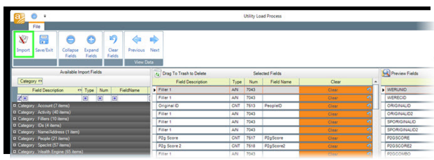
Once your most recent data file is displayed in the *File Name of Import field*, click *Save Record* as shown below.



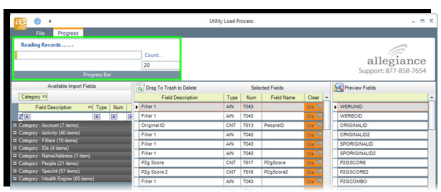
The *Utility Load Process* screen will open and your fields will already be mapped (because you clicked *Save/Exit* once you got all of those fields lined up).

Consider taking the time to click the *Next* arrow a few times to make sure the data fields are lining up properly. If they are, you're good to move to the next step. If they aren't you'll need to fix the errors and then click *Save/Exit*—then you'll need to proceed using the directions above as if this were the first time you'd uploaded/appended WealthEngine data.

Assuming all is well, click *Import*.

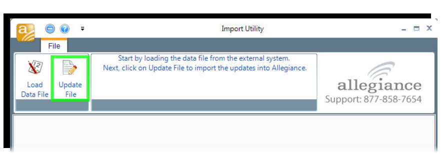


As the *Utility* begins to load the data into Allegiance, you'll see the *Progress Bar* at the top of the screen advance and the *Count* increase.

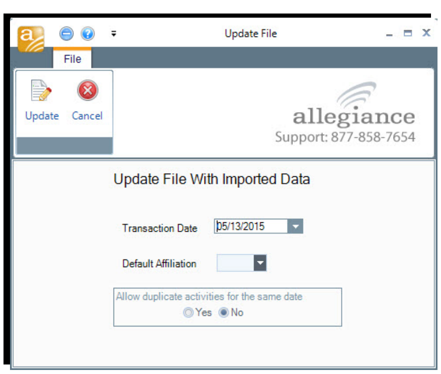


Once complete you will be returned to the *Import Utility* screen (shown below). At this point the data is loaded into Allegiance but it is not yet appended to the records.

Click *Update File* (as outlined below) to begin the process of appending the WealthEngine data to the records.



The *Update File* screen will open, as shown below.



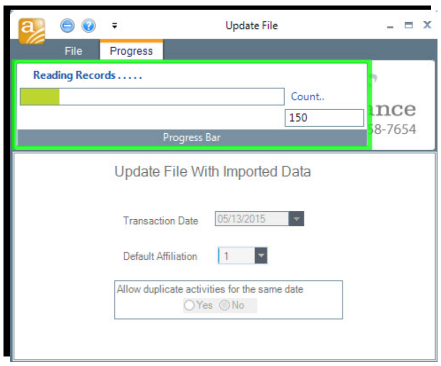
Complete the fields shown above.

Transaction Date: this will default to the current date. You can change it by keying in a different date or using the drop-down arrow to select a date from a calendar.

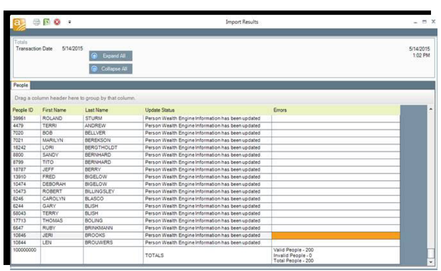
Default Affiliation: (required) even though the WealthEngine data is appended to the *People Record*, you must select an *Affiliation* from this drop-down.

Allow Duplicate Activities for the Same Date: you'll likely have *No* selected when you do WealthEngine imports because it is doubtful you'll do more than on import from WealthEngine in a day. If you should do more than one in a day, however, then click *Yes*.

Click the *Update* button at the top of the screen when the fields are filled in. As the files are being updated you'll see a progress bar advance and the count tick upwards.



Once the data has been appended to the records the *Import Results* screen will open (an example is below).



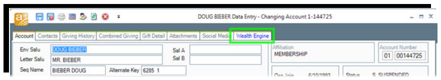
The total number of appended records is listed at the bottom as *Valid* vs *Invalid*. *Valid People* are *People Records* to which the WealthEngine data has been successfully appended. *Invalid People* are *People Records* that had issues or errors during the import process and the data wasn't appended. You'll want to investigate why they are *Invalid* and attempt the upload again. Call Allegiance Support if you would like our help.

At the top of the *Import Results* screen there is a printer icon that prints the results to a PDF and an Excel icon that allows you to download the *Import Results* to a spreadsheet.

Note: until you close this screen, you will be unable to do anything else in Allegiance. Should you find yourself clicking on other screens and nothing is happening, double-check to make sure that this screen isn't open.

Viewing WealthEngine Data on an Account

Once you have appended WealthEngine data to an account singly or through a batch, the WealthEngine tab will now appear with blue text on the *Account* screen, as shown below.



Click on the tab to view the appended data in each of the WealthEngine fields.