

The Blackbaud Bulk Import Service

► Todd Yellin

► Senior Principal Software Engineer

What is Bulk Import?

- A new Blackbaud SKY capability that provides bulk data import capabilities into Blackbaud CRM.
- Minimize the need to:
 - Modify the source files before importing
 - Extend or customize CRM
- Import data that spans multiple CRM batch types
- Fast!



Since last year...

Customer Technical Preview

► Client #1

- Large, quarterly import into constituent attributes
- Previously using multiple Constituent Update Batch imports over several days
- Most recent production import loaded 1.6 million attributes in <7 minutes



► Client #2

- Small, daily files of new constituents
- Contact info, solicit codes, spouses, custom tables
- Client now investigating other imports to use in production



► Client #3

- Small, daily files of new payments
- Revenue attributes



Continuous Delivery



- Iterative improvements based on customer results and feedback
- Bug fixes and enhancements become immediately available to all customers upon completion

Monitoring



- The services send alerts to the team when there is a problem
 - Service down
 - Unexpected errors
 - Performance issues
- The team can access information about client imports in order to proactively respond to problems and improve the product



...to now...

Bulk Import Components & Workflow

► User interface – quick tour

- Import processes
- Import runs
- Managing import exceptions
- Environment picker

► Mapping definitions

- Today = XML
- Coming soon = mapping UI
- <https://docs.blackbaud.com/bulk-import-reference-docs/>



Custom Entities

► Attributes

- Any parent types for which there is an entity available
- Any other parent types can still be imported but you must know the parent record ID

► Custom tables

- Basic validation (max lengths, foreign keys, unique indexes)
- Not covered: triggers, check constraints, anything provided by batch extensions
- Today = insert only



...and beyond!

Mapping UI

Edit mapping for Template_XYZ

?

×

Import file fields

Auto-mapping

find in this list

Q

All fields

⌵

Constituent_type_code

Last

First

Middle

Maiden

Nickname

Title

Suffix

Gender

BD

Deceased

Fields to map

Edit entities

find in this list

Q

Mapped and unmapped fields

⌵

Required and optional fields

⌵

Mapping field	Import file field	Default	Actions
Constituent 1 - Individual <div>⚙</div> <div>⬆</div>			
* Last name (String)			
First name (String)			
Middle name (String)			
Maiden name (String)			
Nickname (String)			
Title (String)			
Suffix (String)			
Title 2 (String)			
Suffix 2 (String)			
Gender (String)			

Save and close

Save and continue

Cancel

19

Unused import fields

1

Entities

1

Unmapped required fields

MADE WITH

in vision

0 Comments

OFF

blackbaud®

Blackbaud CRM™ DEVELOPERS' CONFERENCE

Mapping UI

- Phase 1: Auto-mapping, work w/ XML in the browser
- Phase 2: Interactive mapping experience w/ basic features (hybrid UI/XML)
- Phase 3: Interactive feature buildout



Expressions – What are they for?

➤ Field transformations

- Manipulate the source data, previously mapped entity fields, or existing data from CRM to determine the value to use for an entity field

➤ Entity mapping conditions

- Only create a specific entity on a given file row when...

➤ Custom validation

- Treat a row as invalid and show my custom error message when...

Expressions – What will they look like?

➤ Think spreadsheet formulas

➤ Field transforms

- `Join('\n', AddressLine1, AddressLine2)`
- `PadLeft(StartDate, '0', 8)`

➤ Entity mapping conditions

- `Equal(Gender, 'Male')`
- `IsNotBlank(Spouse_first_name)`

➤ Custom validation

- `LessThan(Payment1.Amount, 5) → “A payment cannot be less than $5.”`
- `LessThan(Interaction1.ExpectedDate, AddMonths(Now(), -1)) → “An interaction expected date cannot be earlier than one month ago.”`





Interested?

Bulk Import Availability & Guided Rollout

- Now = Customers using Blackbaud Hosting in the Boston data center (B03)
- CRM 4.0 SP14 (minimum)
- Planned for 2019 = Customers using Blackbaud Hosting in Azure
- We are evaluating support for other locations

- Guided Rollout (now)
 - Work with the bulk import team to determine how your use case fits with bulk import's current capabilities
 - Work with professional services as needed to:
 - Provide assistance with mapping
 - Add missing entities, expression functions, or other import features

Contact Us!



Todd Yellin

Senior Principal Software Engineer

todd.yellin@blackbaud.com



Brad Gleich

Software Development Manager

brad.gleich@blackbaud.com

Ellyn LaVecchia

Principal Product Manager

ellyn.lavecchia@blackbaud.com



Pat Conley

Senior Business Analyst

pat.conley@blackbaud.com

