The Blackbaud Bulk Import Service

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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

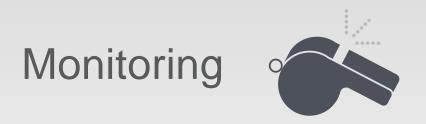




Continuous Delivery



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



- > 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

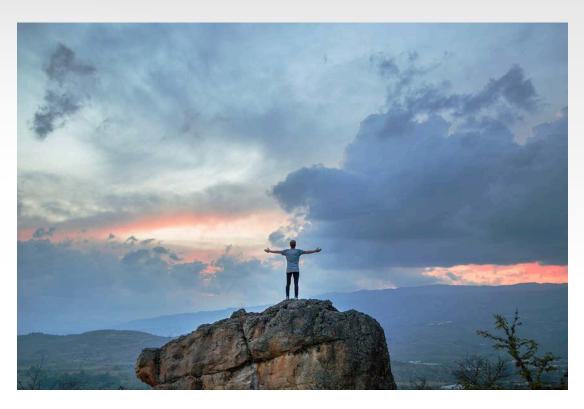
...to now...

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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

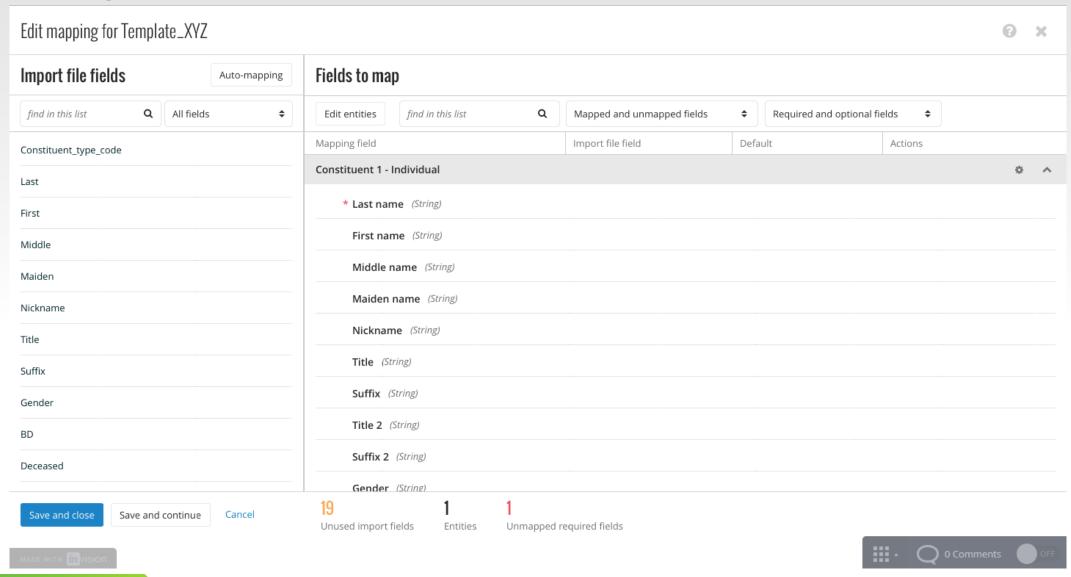
- Any parent types for which there is an entity available
- Any other parent types can still be imported but you must know the parent record ID

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



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?

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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!



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