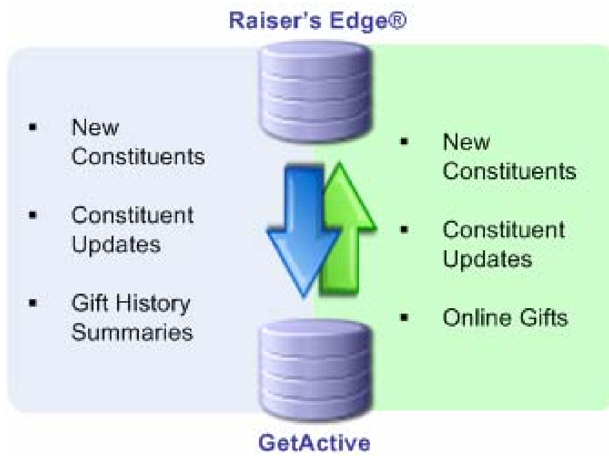
GetActive's Integration Bridge
designed for The Raiser's Edge®

Integrating your offline constituent relationship management (CRM) system—or database—with the GetActive Suite™ provides immeasurable benefits: strategic segmentation, targeted campaigning, informative reporting, and consolidated relationship management. To streamline the tasks associated with this synchronization, we offer the GetActive Integration Bridge. The Bridge application is a powerful software tool developed by GetActive and JCA, Inc. (www.jcainc.com), a GetActive partner and nationally recognized consulting firm serving the nonprofit community. The Bridge facilitates the regular exchange of data between The Raiser's Edge® and GetActive.



The Integration Bridge saves staff time by automating key aspects of the data synchronization process, configured to your organization's specific needs. Exchanges can occur daily, weekly, or as often as needed.

Benefits:

- Improve communications with constituents.
- Reduce staff time devoted to integration.
- Enjoy a consistent, sustainable integration process.
- Provide a complete donor history.
- Prevent duplicate records.

Results:

- Name, address, phone, email, and other profile changes are regularly synchronized.
- Online donation histories are represented offline.
- New records are available for outreach from both systems.
- Individual preferences, special codes, and custom fields are exchanged.

How does it work?

Every organization has unique needs with respect to integration. The Bridge satisfies core integration needs but has also been developed with customization in mind. Our experienced team of integration experts will work together with your staff to document the needs, goals, data model, and exchange schedule requirements for integration, and then configure the Bridge to serve these objectives. Installed on your local computer, the Bridge application will make regularly scheduled "calls" to GetActive for synchronization. The Bridge will then perform the following functions:

From the GetActive Suite™	• Download new constituent records added to GetActive since the last exchange. • Download existing constituent records with recent profile changes. • Download recent donations and requested transaction details.
Data Review	• Check and flag potential duplicates of new constituents from GetActive before importing into The Raiser's Edge®. Duplicates can be checked and processed before import.
From The Raiser's Edge®	• Upload new constituents from The Raiser's Edge®. • Update changes to constituent records to GetActive. • Upload summary of gift history for all The Raiser's Edge® donors to GetActive.

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Transferring Data

The GetActive Integration Bridge will automatically queue files for upload from The Raiser's Edge® and use a predetermined set of GetActive queries to export the correct constituent and transaction records from the Constituent Data Hub™. The data exchange occurs during off-peak hours to preserve system resources and prepare any exception records or possible duplicates for resolution. Detailed logs of record changes and exceptions are automatically stored to preserve documentation and facilitate necessary auditing.

Getting Started

If you are currently exchanging data with GetActive, our team will review your integration practices and configure the Bridge to automate the exchange. Our team will provide assistance with test exchanges and train your staff to manage the process with confidence. Important considerations, such as which online constituents meet your criteria for import into The Raiser's Edge®, will be reviewed.

If you have not yet begun data exchange with GetActive, our experienced team of integration specialists will work with your staff to identify objectives and configure the Bridge application to meet your needs. Our experts can provide best-practice recommendations for data structure, internal business processes, and necessary system changes to meet your goals. The following is a brief overview of the implementation process once your organization purchases the Integration Bridge.

Implementation Process

1. Kick-off meeting to discuss objectives
2. Review of existing data structures in The Raiser's Edge® and GetActive
3. Installation of the Bridge for testing
4. Creation or modification of export files in GetActive
5. Preparation of test records for exchange
6. Test exported and imported files between systems
7. Joint testing by JCA, your staff, and GetActive
8. Preparation for going live with training
9. Go live and monitoring of the Bridge

Required Components

- GetActive Constituent Data Hub with auto-generated unique ID system in place
- The Raiser's Edge® version 7.6 or higher running on SQL Server
- Windows .NET framework installed on the PC running the Bridge
- Internet access

Technical Requirements

- Local administrator rights to a PC on your network
- The Raiser's Edge® installed
- A licensed copy of WinZip with the "Command Line" add-on installed
- A licensed copy of Cute FTP installed
- Security rights to create new users and run imports in The Raiser's Edge®

Staff Resources

To ensure successful configuration and maintenance of the GetActive Integration Bridge, several decisions and business processes should be discussed prior to final installation. These decisions are best made in consultation with GetActive, and should include the fundraising staff members most familiar with your database as well as a technology support staff member dedicated to managing the exchange process. After discussions with GetActive are complete, a consultant from JCA will work with you to install and configure the Bridge to meet your needs. Once installed, JCA will work with you and GetActive to complete testing before going live with ongoing data exchange via the Bridge.