

**Omatic Cloud**

Integration Processing Decisions

***Please answer these questions to the best of your ability. If you are unsure of an answer, your consultant will work with you during onboarding to answer your questions.***

1. Are there any required constituent fields in your database? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
If so, what are they and what are the values?

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**This section is for organizations who utilize Salesforce as its System of Record (‘SoR’) If your organization does not utilize Salesforce as its SoR, please skip this section.**

1. Concerning Addresses, which option sounds like your preferred way to import? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	1. Overwrite the destination (SoR) address with the source (incoming) data; or
	2. Compare the address that is incoming from the source against the data is in the SoR/destination
2. Are you importing transactions? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If so, what kind of transactions? Examples include: Gifts, Registration fees, etc.

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Do you use different opportunity record types? If so, please provide the record type ID and record type name.

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**This section is for organizations who utilize Blackbaud Raiser’s Edge (‘RE NXT’) as its System of Record (‘SoR’). If your organization does not utilize RENXT as its SoR, please skip this section.**

1. Are you planning on importing gifts? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If so, what kind? Examples include: Cash, Recurring Gift, Recurring Gift Pay-Cash, etc.

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1. Are you planning on importing data to existing relationships or spouse records? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Are you planning on importing new relationships or spouse records? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**This section is for organizations who utilize Blackbaud CRM (‘BBCRM’) as its System of Record (‘SoR’). If your organization does not utilize BBCRM as its SoR, please skip this section.**

1. Concerning Addresses, which option sounds like your preferred way to import? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	1. Overwrite the destination (SoR) address with the source (incoming) data; or
	2. SoR address survives and a new address record is created
2. Are you importing transactions? Y/N \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If so, what kind of transactions? Examples include: Gifts, Registration fees, etc.

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