

ENCC

Making Sense of your data

Thursday 26th May

Speakers

[James Dungate](#) – Head of Engagement Operations

I'm an engaging team leader, specialising in CRM systems and strategy and their role in the delivery of an elite customer experience

[Alex Proniewicz-Brooks](#) – Database Manager

Responsible for the Raiser's Edge and managing a team of 3 people

[Anthony Fawkes](#) – Consultant, Actually Data

Data Strategy and Integration specialist in the NFP sector, specialising in CRM Migration and Database Management and Engaging Networks Data Integration Partner

What we're going to cover

Why Sense chose EN

How we tackled the integration

- Supporter Data Mapping

- Page Coding

- Mapping to the CRM

- Test Load

Demo Integration

Challenges

Future Phases

Why we chose Engaging Networks

Digital Strategy

Flexibility

Why Sense wanted an Integration Partner

Integration Process

Project Plan from EN

Supporter Data Mapping - what data are you collecting

Coding Pages for financial codes

Mapping

Most import part - mapping to the CRM Things to think about

Different Campaign Types (ETT/ FCS etc)

Required Fields in the CRM

How it's done

Power Query in Excel (Office 365)

Export API from EN - you will need a special api key

Data transformations in excel

Demo

A couple of button pushes to get the data and then export it.

Lookup tables for coding

Engaging Networks Processing Form

Please Choose a Start Date: Format ("MMDDYYYY")

Please Choose an End Date: Format ("MMDDYYYY")

CHECK THAT ALL RECORDS HAVE AN RE EVENT ID

UPDATES

- V1 - General Release to Sense
- V1.1 - New Endpoint due to EN moving to AWS
- V1.2 - Added Export Button for Campaigners
- V1.3 - Added Export Button for Gifts
- V1.3 - Added GADStartDate for Gift Aid Declarations
- V1.4 - Major Revision to try and pick up Events Forms and Other Form Capture Data as well as removing duplicates in Email Opt ins
- V1.5 - Events Data capture added and Participant Attributes

Lookup Table

PageID	Participation	Participation Status
26170387	CP	Participant
99999		

Gifts Lookup Table - FOR TESTING ONLY!

EN Page ID	Appeal	Fund	Campaign	Package
232028	ENTA	ENTF	K1720	
239074				
243266	GEN21	UFG	K1720	WEB
243312	MSI	UFG	K1720	
244076	WM321	RA38	K1720	F012

Events Lookup Table - PLEASE ADD NEW EVENTS TO THIS LIST

EN Page ID	Event Name	RE EventID
248485	Royal Parks Marathon	RPHM22
248486	Ride London Essex	RL22
248490	Richmond Run Fest Half Marathon	RRF22
248491	Richmond Run Fest Marathon	RRF22
245934	Sensational Tea Party	STP22

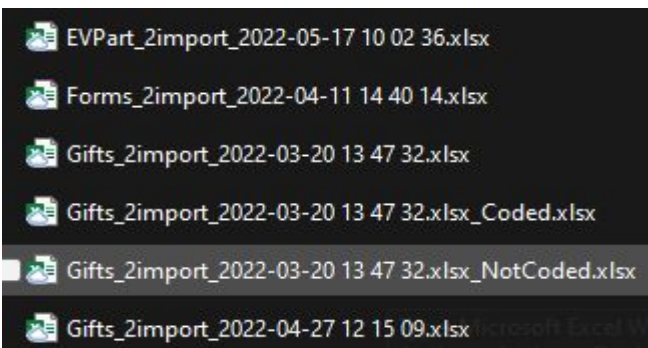
@actually data LTD

Process sheet | Raw Data | Campaigners | IncomeProcessing | New Income | Forms | Event Participants | Participant Attributes | Other Income Processing Data | PreferenceData | Unsubscribes | Amount for Recurring Gift

Demo

BA	BB	BC	BD
External Reference 6	External Reference 7	External Reference 8	External Reference 9
GEN	UFG	K1720	WEB
DRTV122	UFG	K1720	WEB
RPHM22	UFG	K1780	
GEN	UFG	K1720	WEB
WM122	UFG	K1720	WEB
GEN	UFG	K1720	WEB
DRTV122	UFG	K1720	WEB
GEN	UFG	K1720	WEB
GEN	UFG	K1720	WEB
RL22	UFG	K1780	
RRF22	UFG	K1780	
RRF22	UFG	K1780	
WM521	UFG	K1720	WEB
RPHM22	UFG	K1780	
WM521E1	UFG	K1720	WEB
RPHM22	UFG	K1780	

Here you can see the page coding coming down in the export from Engaging Networks Export API



Files are then generated that can be imported using the import tools into RE.

How can you do this yourself

- 'What you need
- 'Super Admin details for API Key
- 'Excel and Power Query - Will work on Excel from 2013 onwards or office 365
- 'Access to the master export layout
- 'Mapping of your CRM
- 'DATA!!!

Future Phases

Iterative process for testing we're currently on version 1.5

2 way synchronization Raiser's Edge - Engaging Networks

QUESTIONS?

Thank You.

Contact Information:

For Sense:

James : james.dungate@sense.org.uk

Alex : alex.proniewicz-brooks@sense.org.uk

For Actually Data

Ant: anthony@actuallydata.com

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One-off

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Ernie has Down's syndrome. He and his whole family are supported by Sense's family centre near Bristol.