Allegiance Fundraising V 9.2

WealthEngine Interface User Guide

Introduction to Allegiance's WealthEngine Interface

Allegiance has partnered with WealthEngine to bring to our clients access to WealthEngine's comprehensive wealth identification, wealth intelligence, and prospect research solution across four key areas: analytics, research, prospecting, and consulting.

The foundation for WealthEngine's solution is FindWealth Online, their wealth intelligence platform that brings comprehensive insight into the wealth and lifestyle of your donors and prospects.

With this partnership, Allegiance offers their clients the ability to access this online information and then append that information into their Allegiance database. This can be done one selected record at a time or by importing a selected file of multiple donors from the Allegiance database.

Getting Started with WealthEngine

You will need to contact WealthEngine and set up an account with them. They will give you a user ID and password to access their website.

Once you have your account set up with WealthEngine you will then need to call the Allegiance Support line (877-858-7654) to have the WealthEngine interface activated in your database. This must be done by Allegiance as activation happens in a secure area of your database; while there the Allegiance Support Rep will also need to set up a WealthEngine *Gateway Record*. Please have the username and password that WealthEngine gave you handy to make setting up the gateway faster when you call. Once this process is complete, the WealthEngine tabs that had been grayed out will now be accessible.

Locating WealthEngine Information in Allegiance

WealthEngine information is stored in the Allegiance Database on the *People Record*. You can view that information from either the *Account Record* or the *People Record* via the *WealthEngine* tab. Both of these are explained below.

Accessing WealthEngine from an Account Record

Once the *Account Record* is open, click on the *WealthEngine* tab at the top of the screen to view the WealthEngine information for that *Account*, as indicated below.



WealthEngine Record from the Account Record

The screen below shows all of the fields that are available when you append data from WealthEngine. The returned information comes in codes (which will be visible in a later section of this document), but once it is imported into Allegiance those codes are displayed here with a description and the returned data.

6			10				
coount Contacts Giving Hist	ry Combined	Giving Gift Detail At	tachments Social Media Tries	Ith Engine			
eople Records				201			
Envelope Saluta	tion -	9 Email		lephone	· Attached · Pe		
Primary JOHN SMITH		buckbelmore@cox.		ione (701) 463-0619		623	
Secondary MARY SMITH		conniedee@cox.ne	t Pt	one (701) 463-0619	10/15/2007 40	624	
Ratinos Summary							1
	Date Updated		View Wealth Profile	View Reser	rch Details		
P2G			infuerce				
P2G Description			Inclination	Atlation			1 4
Giving Capacity Range			Inclination	Giving			
Estimated Annual Donations			Bequest				
Net Islath			Annuity				
Total Assets			Trust				
Cash on Hand			Age				
Wealth Summary							
Income Rating			Political Contril	bullions .			
Real Estate Value			Company Own				
Property Count							
			Boat Owner				
Direct Stock Holdings			Gintralt Owner				

Note: <u>You cannot enter information into these fields via *Data Entry*.</u> These fields can only be populated via a WealthEngine upload or by the single record upload in Allegiance.

Accessing WealthEngine from a People Record

When in an open *People Record*, click on the *WealthEngine Tab* to view the WealthEngine information.

		Name Breakdo	A/8	
Envelope	40523 JOHN SMITH	Prefix		Rebesh
Letter	JOHN	First	JOHN	
Job Tide		Middle		
Alias		Last	SMITH	
Alternate Key		Suffix		
Home	4525 GRAND DR UNIT 2 FARGO, ND 69103			
	405 GRAND DR UHT 2 FARGO, ND 56110			
elephones	FARGO, ND 68169	Emails/UPLs	🌛 Edit 🍙 Delete 🦚 S	earch Account for Email
eleptones La Inset I P Type I	FARGO, ND 68103		🕞 Edit 💊 Delete 🦓 S Email Address	earch Account for Email Email Description

WealthEngine Record from the People Record

Shown below is how the WealthEngine information is displayed on a donor's Person Record, as

you can see it is the same layout of fields as above (when accessing the information from the *Account Record*).

🤁 🗄 📾 🕸 🔹	Chaoging a Personal Record for JOHIN SMITH
autoine Addresses Demographics Biographical	Activities Attachments Social Media Wealth Engine
Patrops Survey Date Updated P3S P3G	View Network Token Yorker Statuls Metwork Ring
Net Viorth Total Assets Cash on Hend	Annulty Trust Ape
Health Sammary Income Rading Real Estate Value Propeny Count Direct Stock Holdings Pension Charitable Contributions	Pallad Carebulars Crawp Ownink Vide Bur Own Anno Own Bard Norbe
Dets Sources Guelly of Match (GOM) Aircraft Owners Airmen License Charitable Donations D&B State Business Registrations	Marke Guise Marquis Yiho Marquis Yiho Marquis Yiho Pervisir Kiden

Note: <u>You cannot enter information into these fields via *Data Entry*</u>. These fields can only be populated via a WealthEngine upload or by the single record upload in Allegiance.

Working with WealthEngine on a Single Record

From an individual donor's WealthEngine tab you have three options in working with the WealthEngine data: View Wealth Profile, View Research Details, and Remove Wealth Profile.

Viewing a Donor's Wealth Profile

Go to either the *Account Record* or *People Record* and click on the *WealthEngine* tab within the donor's record; from there click on the *View Wealth Profile* button (outlined in green below).

unt Contects Giving Hestory Gilt Detail Attachments	Providence in the second
in Foreita	Torra Neral Avenue Andre
0 Envelope Solutation 0 Email	= Telephone = Attached = People ID =
Nary JOHN SMITH	Phane (191) 815-1566 21922
Ings Summary Inte Created Date Updated	View Needth Photos View Resserch Cetals
26	Influence Rating
2G Description	Inclination Afflation
ining Capacity Range	Inclination Giving
atimated Annual Constions	Bequest
actions	Lengty
otal Assets	Test
ash on Hand	100
with Summary come Rating	Political Contributions
Inal Estate Value	Company Deveratio Value
Ingenty Count	East Duner
irect Stock Holdings	Aircraft Owner
waice	Board Member
hanitable Contributions	Cost Mercer
ta Sources Quality of Match (QOM)	Market Guide
Vicraft Owners	Nexus vitra litra
Virmen License	Marques VMus VMu
Charitable Constions	Nerchart Vessels Persian Holden
388 State Business Repistrations	Priarthopic Donations
248	Prysiciana Profile
Do Not Mail List	Physicians Proble Baol Existe
ederal Electronic Contributions	Section 527 Directors
oundation Trustees	Section 527 Detectors
Juide Star Foundation	Section 527 Political Orga State Publical Docations
Juide Star Directors	
iovers	SSA Death Report
kousehold Profile	Volunteers and Directors

View Wealth Profile sends the donor's name and address parameters to WealthEngine and WealthEngine returns with data that matches those parameters.

The Search *WealthEngine* window will open (shown below) from there click on the *Search WealthEngine* button (outlined in green below).

	elige Salutation 🔅 Email Hi Sha'TH	Telephone Attached People ID = Phone: (T01) 810-1066 21822
rch Wealth En	pine Note: All fields are required	
First Name	JOHN	
Last Name	SMTH	
Address	4525 GRAND DR UNIT 2	
City	FARSO	
State	ND	
Zip Code	58103	
	Search Wealth Engine	

Once the information is retrieved, that information will appear in the right-most window in a scripted format (as shown below).

	Rope Salutation ⁽²⁾ Email ⁽³⁾	 Telephone Attached People ID Phone (701) \$10,1056 21822
iearch Wealth Eng	ine Note: All fields are required	VeRvice 3225035 VeRvice 21050782 Deserved
First Name	JOHN]	Originatid2 P2gScore 3 P2gScore 2
Lost Name	SMTH	P2pCombo 3/2 P2DDesc Average Assertance (3255
Address	4626 GRAND DR UNIT 2	AsseRating: VE.ASSETS.001 NetworthRange: <22X NetworthRange: VE.NETVRTH.001
City	FARGO	Liquidh/Range: (\$10K) Liquidh/Range: (\$10K)
State	ND	ExtRange: <31K ExtRange (vE_ANNDON 001 InclinatorGiv: Passect
Zip Code	58103 Search Inivalth Engine	Inclusion of Instance Support Capacity Official Support General Capacity Page 196 CPCLP 011 Capacity Page 2504 5505 Giurny Capacity Page 2504 5507 Giurny Capacity Page 2504 5507 Biotech C

After reviewing the information in the pane on the right, click *Save Results* to keep it and append it to this donor's *People Record*, or *Cancel* it without saving the information.

Saving the information will update the *Journal Records*, and return you to the *WealthEngine* tab on the *People Record*. Any data that was returned will now be populated on this screen.

Adding WealthEngine Information to a Single Record

If you wish to save the returned results from this search click on the *Save Results* button (outlined in green above). The returned information will now be populated on the Allegiance *WealthEngine* tab of their account, as shown below.

ount Contacts Giving Hist	ory Gill Detail Attachments Social M	intia Valada Engine		
Ø Envelope Saluti	tion 0 Erval	 Telephone 	 Attached <> People ID > 	
mary JOHN SMITH		Phone (721) 8	10-1066 21822	
elinge Summery				
Date Created 57/2015	Date Updated	View Health Profile Vie	w Research Details Remaine Wealth Findle	
P2G	3	Influence Rating	Unable to Rate	
P2G Description	Average	Inclination Attilation	STRONG POLITICAL SUPPORT	
Giving Capacity Range	\$306.640K	Inclination Giving	PROSPECT	
Estimated Annual Donations	431K	Bequest	NO	
Net hiorth	43K	heavity	0	
Total Assets	<\$25K	Trust	0	
Cash on Hand	(\$10K	Age	0	
kelth Sunnery				
income Rating	Unable to Rate	Political Contributions	\$36-\$5K	
Real Estate Value	Unable to Rate	Congany Ownership Value	Urable to Rate	
Property Court	0	Boat Owner	NO	
Direct Stock Holdings	Unable to Rate	Aircraft Owner	NO	
Penalon	Unable to Rate	Board Member	YES	
Charitable Contributions	\$1MM+			
ata Sources Quality of March	(90%)			
Aircraft Owners		Market Guide		
Airmen License		Marquis Who's Who		
Charitable Donations	MEDRUM	Merchant Vessels		
D&B State Business Registry	tions	Pension Holders		
D88	MEDIUM	Philanthropic Donations		
Do Not Mail List		Physiciana Pholile		
Federal Electronic Contributi	ons MEDRUM	Real Exten	NECIUM	
Foundation Trustees		Section \$27 Directors		
Guide Star Foundation		Section 527 Political Orga		
Guide Star Directors	MEDIUM	State Political Donations	MECHUM	
Hoover's		SSA Death Report		
Household Profile	MEDIUM	Volunteers and Directors		

Clicking the *View Research Details* button (outlined in green above) will launch a browser and take you to WealthEngine's website where you will be able to view additional information about this donor. An example of WealthEngine's Person Profile page is shown below.



Deleting WealthEngine Information from a Single Record

To remove the WealthEngine information from a *Person Record*, click on the *Remove Wealth Profile* button (outlined in green below). A *Confirm Removal* window will pop asking you if you are sure you want to remove the information. If you are sure, click *Yes*. If you don't wish to remove the profile info click *No*.

ople Records R Envelope Salut	ation 0 Email	○ Telephone ○ Attached ○ Pecole D ○	
imary JOHN SMITH	NOT TO LITER	Phone: (701) 810-1056 21822	
Date Created 5/7/2015	Date Updated	View Wealth Profile View Research Details Remove Wealth Profile	
	1	Influence Rating Unable to Rate	
P2G Description	Average	Inclination Atiliation STRONG POLITICAL SUPPORT	
Giving Capacity Range	\$30K-\$40K	22	
Estimated Annual Donations	d1K	Confirm Removal	
Net bloth	d25K	Contirm Removal	
Total Assets	<\$25K		
	<\$25K	Are very surrevery used to remove the wealth data from this contact?	
Total Assets Cash on Hand		Are you sure you want to remove the wealth data from this contact?	
Total Assets Cash on Hand Visath Summary	d\$10K	Are you sure you want to remove the wealth data from this contact?	
Total Assets Cash on Hand Seath Summary Income Rating	ct10K Unable to Rate	Are you sure you want to remove the wealth data from this contact?	
Total Assets Cash on Hand Visath Summary	d\$10K		

Creating a File for a Data Screening Batch in WealthEngine

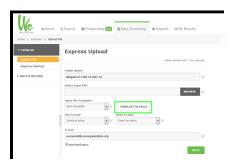
In order to send a batch of records to WealthEngine for their Data Screening process, you will first need to create a download file of the accounts for which you'd like to get profile information. Allegiance recommends that you use either *SQL Query, Major Donor Function*, or *Miscellaneous Contact Function*. All of these Functions are in the On *Demand Menu* of the Allegiance Main Menu. Use a DOWN *Media* when creating the file.

Before downloading the information from Allegiance, be sure to review the two formats WealthEngine has for you to use as you map your data.

WealthEngine has two formats, a BASIC format and a DETAIL format. Log into the WealthEngine site and go to Data Screening > Express > Upload File, as outlined below in blue.

ne -> Express -> Uple	ad File	
XPRESS	Express Upload	
pload File	Field	s marked with * are required.
xpress History		
ATCH UPLOAD	Folder Name* allegiance17300 1544AV-15	0
ATCH OT COMP	aneguarce17.00 15-Mar-15	0
	Select Input File*	_
		BROWSE
	Input File Template*	
	Select an option 🔹 👔	
	Basic Template Rows to skip*	
	Detail Template Select an option	
	Frail	
	E-mail	0

Input File Templates will allow you to choose either the *Basic* or *Detail Template* (outlined in green above). After you choose your template it will show you a button that says *Template Details* immediately to the right (outlined in green below) of the drop-down menu.



Click the *Template Details* button to open a chart showing the fields required for the template you've chosen. Allegiance strongly encourages you to print out the page of required fields and save it for future reference.

Below is an example of the fields to download, in the order that they appear on the Basic Template.

It is required that the *PeopleID* (Field Number 4270) is part of the file you are downloading. This will be how Allegiance identifies which *People Record* the WealthEngine data is appended to.

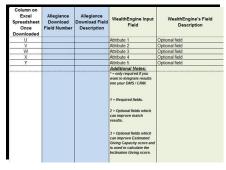
Drag To Trash to D	elete Selecti	ed Fields		
Field Name	Field Description	Туре	Num	Len / #Items
PeopleID	People ID	CNT	4270	
Prefix	Prefix	A/N	4263	
J FirstName	First Name	A/N	4246	
J MiddleName	Middle Name	A/N	4257	
J LastName	Last Name	A/N	4254	
J Suffix	Suffix	A/N	4266	
Addr1	Address Line 1	A/N	4008	
J Addr	Address Line 2	A/N	4009	
D City	City	A/N	90	
J StateProv	State or Province	A/N	23	
J USZipCode	Zip Code US5 digit	A/N	24	
J TotLifetimeGiving	Total Lifetime Giving Amount	AMT	225	
J NumReniPigs	Number of Renewal Pledges	CNT	232	
J TotNumGifts	Total Number of Gifts	CNT	1001	
🖉 LastRenlAmt	Last Renewal Amount	AMT	208	
J LastReniDate	Last Renewal Month/Year	M/Y	207	
J HighestPlgAmt	Highest Pledge Amount	AMT	220	
/ HighestPlgDate	Highest Pledge Month/Year	M/Y	219	

Use the information from the *Template Details* chart to select all the required fields for that template to be included in your DOWN *Media*. There are some fields that are optional.

Below is a cross-listing of *Download Fields* in Allegiance as matched to as many fields as possible from WealthEngine's Basic Template.

Column on Excel Spreadsheet Once Downloaded	Allegiance Download Field Number	Allegiance Download Field Description	WealthEngine Input Field	WealthEngine's Field Description
A	4270	People ID	User Supplied ID	This field is only used for integrating the results data back into your DMS / CRM system.
В	4263	Prefix	Prefix	Optional field
С	4246	First Name	First Name ¹	Required field
D	4257	Middle Name	Middle Name or Initial ²	Optional field which can improve your match results.
E	4254	Last Name	Last Name ¹	Required field
F	4266	Suffix	Suffix	Optional field
G	4008	Address Line 1	Primary Address	Required field
н	4009	Address Line 2	Primary Address Line ²	Optional field
1	90	City	Primary Address City1	Required field
J	23	State or Province	Primary Address State ¹	Required field 2 digit state code only
к	24	Zip Code (5-digit)	Primary Address Zip ¹	Required field 5 digit zip code only
L	225	Total Lifetime Giving Amount	Total Giving ³	Total dollar amount of gifts given to your organization, e.g. lifetime giving.
м	232	Number of Renewal Pledges	Years Giving ³	The number of years an individual has given to your organization, e.g. lifetime giving years.
N	1001	Total Number of Gifts	Number of Gifts ³	Total number of gifts given to your organization.
0	208	Last Renewal Amount	Last Gift Amount ³	The dollar amount of the last gift given to your organization.
Ρ	207	Last Renewal Month/Year	Last Gift Date ³	The date of the last gift given to your organization.
Q	220	Highest Pledge Amount	Largest Gift Amount ³	The dollar amount of the largest gift given to your organization.
R	219	Highest Pledge Month/Year	Largest Gift Date ³	Date of the largest gift to your organization.

Image is continued on next page ...



IMPORTANT: the layout of your Excel Spreadsheet is crucial to a successful upload to WealthEngine!

The *Basic Template* from WealthEngine has more fields/columns than will download using the fields above. You will need to manually add columns to your Excel spreadsheet to match the number of columns that WealthEngine requires. (For example, the *Basic Template* has columns A-Y on it, so the spreadsheet you create also has to have columns A-Y.)

Columns U-Y on the spreadsheet you download from Allegiance will have no data. Add the WealthEngine Input fields from the chart above as the column headers for columns U-Y and leave the cells in those columns blank. The amount of columns just has to match what WealthEngine is asking for, they do not need to contain data.

Prior to doing the upload, make sure your data has no commas in it if you are sending a CSV

file. Believe it or not, a name like Charles Wallace, III can cause major headaches when trying to work with a CSV file because of the comma between 'Wallace' and 'III.' To avoid problems you could save your Excel file as a tab delimited (.txt) file, either file format works with WealthEngine.

Once you have a file that matches their template then you are ready to do the Express Upload.

On the Express Upload screen, click on the *Browse* button to select the .txt or .csv file that you'd like to upload.

Home #Home		My Results
EXPRESS Upload File	Express Upload	ed with " are required.
Express History	Folder Name*	
BATCH UPLOAD	Folder Aunte	ø
	Select Input File*	BROWSE
	Input File Template*	
	Select an option	
	File Format* Rows to skip*	
	Select an option • O Select an option • O	
	E-mail	
	youremail@yourorganization.org	0
	😢 Send Notification	NEXT

A *File Upload* window will open (yours may look a bit different depending on the browser you are using):

🕒 🔍 📲 🔸 Computer 🔸 Local			ρ			
Organize • New folder						
🖌 🔆 Favorites	A Name		Date modified	Type	Size	1
E Desktop	🗼 New fold	er	1/13/2014 12:45 PM	File folder		
Cibraries	z 🔒 PerfLogs		7/13/2009 10:20 PM	File folder		
bownloads 2	🗼 Personal		5/13/2014 12:29 PM	File folder		
Secent Places	🔒 Program	Files	11/5/2014 5:00 PM	File folder		
	Program	Files (x86)	5/12/2015 10:58 AM	File folder		
a 词 Libraries	Program	Data	4/14/2015 4:41 PM	File folder		1
Documents	Saved M	edias	4/21/2015 5:45 PM	File folder		
> 👌 Music	SQL DAT	ABASES	1/22/2014 9:58 AM	File folder		
Pictures	a swsetup		6/19/2013 2:24 PM	File folder		
> 🖬 Videos	SYSTEM	SAV	6/19/2013 2:25 PM	Filefolder		
File name:				All Files (".")		

Navigate to the location on your computer/server that your file is saved, and double-click it. The file will now appear in the Select Input File box, as shown below.

A Home		My Results
COPRESS	Express Upload	
Upload File	Fields mark	ed with " are required.
Express History		
BATCH UPLOAD	Fulder Nerre ⁺ allegiance17300 13 MAX-15	0
	Select Input File*	
	WE upload Maj Don May 2015.csv	BROWSE 💿
	Snyat File Template" Select as option	
	File Format* Rows to skip*	
	: Select an option 🔹 🕤 Select an option 🔹 🕤	
	E-mail	
	youremail@yourorganization.org	Ð
	V tend hatfeation	

Set the Input File Template to whichever you have chosen to use, above I used the example of the Basic Template so I'll use that again here (outlined in green below).

At Achieve Home		tesults
- EXPRESS	Express Upload	
Uplood File	Fields marked wit	h." are required.
Express History	Folder Name*	
BATCH UPLOAD	Polifer Name" allegaroe17300 13-MAY-15	Θ
	Select Input File*	
	WE upload Maj Don May 2015.csv	nowse 💿
	Imput File Template* Date: Tem	oprate number
	header and bla	nic rows, Note if
	File Format* Rows to skip*	uld select 2 as
	Comma Delimited • 1 • • • • • • • • • • • • • • • • •	P
	E-mail	
	youremail@yourorganization.org	0
	Servi Section	

Because I've created my upload file as a .csv, I select *Comma Delimited* from the File Format drop-down (outlined in blue above).

The first row of your file should have column headers so you will need to tell WealthEngine to skip at least the first row. More information can be seen in the help information to the right of the

Rows to Skip field above.

If you wish to receive an email notification when your file has finished processing, enter your email address in the field (once you enter an email address, the Send Notification box will automatically check itself). You will also receive an email notifying you when the file is initially received at WealthEngine.

Going back to the Folder Name field at the top of the screen, once you click Next WealthEngine will automatically assign the Folder Name per the information outlined in green below. Of course you can enter in a Folder Name of your choosing as well.

HALDENEAR #Home	Q.Search @Prospecting C Data Screening Reports IMV Result	
Home + Express + Uploa • EXPRESS Upload File	File Express Upload to the set of	
Express History BATCH UPLOAD	Felder Name* Felde	* <u>-</u>
	Select Input File*	0
	Inguit Mile Template" Belect as option	
	File Format* Reves to skip* Select an option	
	E-mail youremail@yoursrganization.org	Θ
	I Send Notification	хт

Click the *Next* button to verify your information per the screen pictured below.

earch 불Prospectin	g 🚾 ∎Data Screening @ Reports ≡ My Resu
Express File Up	bload
Folder Name:	allegiance17300 13-MAY-15
Input File:	WE upload Maj Don May 2015.csv
Input File Template:	Basic Template
File Format:	COMMA
E-mail:	youremail@yourorganization.org
	Folder Name: Input File: Input File Template: File Format:

Click Upload to upload your file to WealthEngine.

After receiving the email from WealthEngine that says your data is ready, log into the WealthEngine client site and click on My Results. A sample of an export file is shown below.

Aller altater		¥200	er() eg 🗂	B.Dels Scim	ming with	gods HDty Rea	-										1
Name - Margary																	
+ HARDER	046	Diff to the	100													0 🕹	0
CID AND A REAL	σ	General	Section	Prochase	Public Same	1000	1041	100	14	440	Data Manipa	T Partie	1.160	194	Phi facelylan	horses	-
allegree at 710 18 APR 11.		deter .					1446	10						10	14	110-110-C	
		statute .	122-670-01	Calvery.			Farge -	10.						3.6	innabled	water and	inde
	.0	alifesta .	14.000 (1	hele		1712 Avenue (n	Las Pages	10						28.	Institut	-	14404
		House		34										10		Underlander.	unable
	0	statute	01-107 [1	345		1712 brandwarder	Line begins	10						10	institut	underso and	inde
		states		1.0			14134	10.						10.		-	instead
	- 23	distant	12-404-23	(Parm		1201040-0-01	Farge	10	36.014					100	producted .	publicle rate	Chatter
		distant (New .			Farge .	10								Stable State	10,000
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		essee	11-001-03	Test.		11 spongar thread	Yaqu	10	1110					10	(institut	-	tinging
PROVIDE CONCERNING CONF.	- 11	state	71.475.01	inde:			Targa	140	42.00					1.0	institut	and the local dive	Constant
	190	Addes	10.499.05	10.0			Particular.										

Click on the export icon to the far right, outlined in green above, to begin exporting the WealthEngine data.

When this window appears, select the Standard Partner Integration Export and choose either CSV or Tab Delimited Format in the second box. <u>Do not choose Excel format.</u> Click Export to begin.

EXPORT	
Choose Export*:	Standard Partner Integration Export
Choose Format:	Comma delimited text (CSV)
🔲 Include subfold	lers in the export. O CANCEL EXPORT

Each person's computer is set up to handled downloaded files differently, locate your downloaded file and save it to a safe location.

Using the Import Utility to Append your WealthEngine Information

Use the *Import Utility* tool to import the WealthEngine Profile information back into the Allegiance database.

This tool can be found from the Allegiance Main Menu > *Utilities* > *Imports* > *Import Utility*. If you would like to view some step-by-step examples of using the *Import Utility*, there is a webinar recording on our website titled *Import Utility*. While the examples are not specific to importing WealthEngine data, the webinar does discuss how to map fields and the process that the *Utility* goes through.



The Import Utility window will open, from here click on Load Data File.



Appending WealthEngine Data into Allegiance for the First Time

If you've appended WealthEngine data before, skip to the next section of this document.

If you haven't or if you changed from WealthEngine's Basic to the Detail Template (or vice versa) please continue with this section.

The first time you upload information returned from WealthEngine you'll need to create a new format for importing. To do that, click on *Insert*.

a	٢	÷		Import F	ormat		_ = ×
	File						20
Inser	t Edit	Delete	Сору			alle Support: 8	giance 77-858-7654
Choos	se a Forma	t from the	list or Cre	ate a new format.			
Format	t Name		File Nam	*	Headers	Delimiter	
	A		A	52			
	CCCU			nents and Settings\apierce\		EL.	
2	CLASSI			nents and Settings\apierce\			_
3	DCCOMP	, ,	C:\Users	gpetro\Desktop\dc.comp li	1		
4	OAPROS			vshare\/Cirque\/Cirque Impo	0		
5	OLA13U			vshare\Online Auction\201	1		
6	SAMPLE			Vois ALLEGIANCE\Docum	1		
7	SMRFUN			nents and Settings\lchristia	0		
8	SUMRU9		Chuocur	nents and Settings\apierce\	1		
	File					alla	giance
Reco						Support: 8	77-858-7654
Creati	ng a Form	at Record					
1	Format Na	me					
		ecord Con me of Imp	tains Field	I Names			Browse
	Delimit	er	Com	18			

Format Name: use this field to give your import format a name (perhaps WEALTH). The name can be up to six alphanumeric characters and should be recognizable to other Allegiance Users.

First Record Contains Field Names checkbox: if the file you are importing has column headers, check this box. (Files returned from WealthEngine have column headers.)

File Name of Import: Use the *Browse* button to the right to locate the file you are uploading on your computer/server. (This process will be nearly identical to how you uploaded the original file to WealthEngine as described above.)

Delimiter: use the drop-down menu to select the field delimiter that was used to create the file. If the file has an extension of .csv then select *Comma*, if your file has the extension .txt then select *Tab*.

Once you've completed these fields, click *Save Record* at the top of the window. The *Utility Load Process* window will open. Here you will map the fields in your file. Good news, you should only have to do this once for WealthEngine (possibly twice if you use both the Basic and the Detail Template—which if you do, be sure that your *Format Name* on the screen above clearly identifies which is which!).

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Click on the Next arrow to show the WealthEngine file field headers (outlined in green above).

Notice that the green arrow above is pointing at new WealthEngine fields to use when doing your import, click on the little plus sign to expand the list of fields.

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Some helpful hints:

The 3rd row in the file is the *Original ID* (outlined in green above), and this is how Allegiance will know to which *People Record* the WealthEngine data should be appended.

Make the fields description match the WealthEngine file fields as best you can, if it doesn't match exactly put in a *Filler* field. You will use a lot of *Filler* fields!! (Multiple *Filler* fields are outlined in blue above.) In fact, a good rule of thumb is to use a *Filler* field when the WealthEngine field ends with the word 'RANGE.' (Their RANGE fields are hard-coded in Allegiance as the fields on the WealthEngine tab, so using *Filler* is ok. The fields that end in 'RATING' should have *Import Fields* in Allegiance that can be matched up because their RATING fields are the data that populates the fields in Allegiance.)

There are a lot of fields to match up! Take the time and try to do this when you won't be interrupted. If you get it right the first time, and save it, you shouldn't have to do it again!

Once you are satisfied with how the fields are matched up, click on *Save/Exit* to save the *Format Parameters Setup*. By clicking *Save/Exit* now you shouldn't have to re-map all of these fields again for WealthEngine.

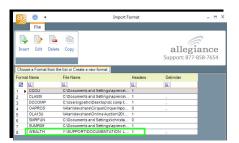


You will be returned to the *Import Utility* screen.

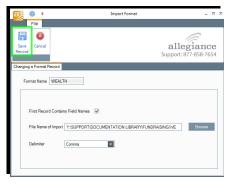
Click on Load Data File again (trust me).



Select your WEALTH Format (or whatever you named it) by double clicking on it (example outlined in green below).



When the Import Format screen opens, click Save Record.



The *Utility Load Process* screen will open and your fields will already be mapped (because you clicked *Save/Exit* once you got all of those fields lined up earlier).

Click Import.



As the *Utility* begins to load the data into Allegiance, you'll see the *Progress Bar* at the top of the screen advance and the *Count* increase.



Once complete you will be returned to the *Import Utility* screen. The data is loaded into Allegiance at this point but it is not yet appended to the records.

Click *Update File* (as outlined below) to begin the process of appending the WealthEngine data to the records.

File File Start by loading the data file from the external system. Next. Click on Update File to import the updates into Allegiance. allegiance	a e	• 🔞 •	Import Utility	_ = ×
Data File Support: 877-858-7654	X			allegiance

The Update File screen will open, as shown below.

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File		
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Update Cance	allegiar	
	Support: 877-858-	7654
	Jpdate File With Imported Data	
	Transaction Date 05/13/2015 -	
	Default Affiliation	
	Allow duplicate activities for the same date © Yes No	

Complete the fields shown above.

Transaction Date: this will default to the current date. You can change it by keying in a different date or using the drop-down arrow to select a date from a calendar.

Default Affiliation: (required) even though the WealthEngine data is appended to the *People Record*, you must select an *Affiliation* from this drop-down.

Allow Duplicate Activities for the Same Date: you'll likely have *No* selected when you do WealthEngine imports because it is doubtful you'll do more than one import from WealthEngine in a day. If you should do more than one in a day, however, then click *Yes*.

Click the *Update* button at the top of the screen when the fields are filled in. As the files are being updated you'll see a progress bar advance and the count tick upwards.

a	9 🕐	Ŧ	Update Fi	le	_ = >
	File	Progress			-
Rea	ding Reco	rds			,
				Count 150	1nce
			Progress Bar		10-7034
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		Default A	filiation 1		
		Allow dupl	CYes ⊙No	me date	

Appending WealthEngine Data into Allegiance Subsequent Times

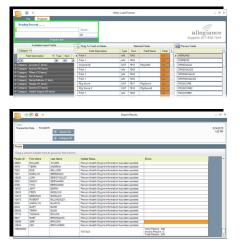
Begin by opening the *Import Utility* found on the Allegiance Main Menu. Click the *Utilities* menu, then use the drop down to open the *Imports* menu, and select *Import Utility*.

	Main	Exp F	Prem	EDT	Kids	Appended	Address	Mat Gift	Day Spn	Web	
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When the Import Utility screen opens, click on Load Data File.

a	e =	Import Format _ 📼 🛪
	File	
	8	
Save Record	Cancel	allegiance Support: 877-858-7654
Changing	a Format Reco	ord
For	rmat Name W	EALTH
		ontaine Field Names 20 wort VISUPPORTDOCUMENTATION LIBRARYFUNDRAISNGINE
	Delimiter	Comma

Select your WEALTH Format (or whatever you named it) by double clicking on it (example outlined in green below).



When the *Import Format* screen opens, you'll need to add your most recent data file from WealthEngine. Use the *Browse* button (outlined in green below) to locate the file you are uploading on your computer/server. (This process will be nearly identical to how you uploaded the original file to WealthEngine as described above.)

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	ccourt Core	acts Giving History Combined Givin	ng Gilt Detail Attachments Social Med	Islealth Engine	
Leter Salu MR BEBER Del D				1 Million	1 Account Number
Seg Name BEBER DOUG Alternate Key 6285 1				Affliction MEMBERSHIP	Account Number 01 00144725

Once your most recent data file is displayed in the *File Name of Import field*, click *Save Record* as shown below.

2 🗄 🗑 🗇 🖩 🎗	8 8 1	PAUL & SARI AIZLEY Data Ent	y - Changing Account 3-245894	- 0
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imary DOUG BEBER		Phone (702) 4		
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	Date Updated	View Inicalth Photlie Vie	w Research Details Remove Wealth Profile	
P2G	2	Influence Rating	Bottom 25%	
P2G Description	Above Average	Inclination Afflation	STRONG POLITICAL SUPPORT	
Giving Capacity Range	\$100K-\$200K	Inclination Giving	MODERATE DATED GIFT(5)	
Estimated Annual Donations	\$96-\$10K	Bequest	YES	
Net Worth	\$1MM-\$5MM	Annuity		
Total Assets	\$1MM-\$5MM	Trust	0	
Cash on Hand	\$10K-\$100K	Age	79	
visith Summary				
Income Rating	\$100K-\$250K	Political Contributions	\$5K-\$10K	
Real Estate Value	\$500K-\$750K	Congany Ownership Value	Unable to Rate	
Property Count	4	Boat Owner	NO	
Direct Stock Holdings	Unable to Rate	Aircraft Owner	NO	
Pension	Unable to Rate	Board Member	POSSIBLE MATCH	
Charitable Combutions	\$50K-\$300K			

The *Utility Load Process* screen will open and your fields will already be mapped (because you clicked *Save/Exit* once you got all of those fields lined up).

Consider taking the time to click the *Next* arrow a few times to make sure the data fields are lining up properly. If they are, you're good to move to the next step. If they aren't you'll need to fix the errors and then click *Save/Exit*—then you'll need to proceed using the directions above as if this were the first time you'd uploaded/appended WealthEngine data.

Assuming all is well, click Import.



As the *Utility* begins to load the data into Allegiance, you'll see the *Progress Bar* at the top of the screen advance and the *Count* increase.

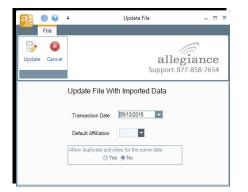


Once complete you will be returned to the *Import Utility* screen (shown below). At this point the data is loaded into Allegiance but it is not yet appended to the records.

Click *Update File* (as outlined below) to begin the process of appending the WealthEngine data to the records.



The Update File screen will open, as shown below.



Complete the fields shown above.

Transaction Date: this will default to the current date. You can change it by keying in a different date or using the drop-down arrow to select a date from a calendar.

Default Affiliation: (required) even though the WealthEngine data is appended to the *People Record*, you must select an *Affiliation* from this drop-down.

Allow Duplicate Activities for the Same Date: you'll likely have *No* selected when you do WealthEngine imports because it is doubtful you'll do more than on import from WealthEngine in a day. If you should do more than one in a day, however, then click *Yes*.

Click the *Update* button at the top of the screen when the fields are filled in. As the files are being updated you'll see a progress bar advance and the count tick upwards.

File Progress Reading Records Count 150 18-7654 Progress Bar Update File With Imported Data Transaction Date Default Affiliation 1	a) 🛛 🛛	Ŧ	Update File		_ = ×
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		Default Affiliation	1 *		
⊖Yes ⊚No				e date	
		OYe	ls ⊚No		

Once the data has been appended to the records the *Import Results* screen will open (an example is below).

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Totals Transactio	n Date 5142	015 Expand All Collapse Al			5/14/2015 1.02 PM
Feople					
Ding a col	umin heidder hei	to to proup by that colum	w.		
People ID	FirstName	Last Name	Update Status	Errora	
19964	mor and	STLIBY.	Person Wealth Engine Information has been updated		
4479	TERR	AND BEW	Person Wealth Engine Information has been updated		
7220	FOR .	RELLVER	Person Wealth Engine Information has been updated		
7021	MARILYN	BEREKSON	Person Wealth Engine Information has been updated		
15242	LORI	DEROTHOLOT	Person Wealth Engine Information has been updated		
8800	SANDY	RERNHARD	Person Wealth Engine Information has been updated		
6799	7/70	DERNHARD	Person Wealth Engine Information has been updated		
13787	3077	DORRY	Person Wealth Engine Information has been updated		
13993	FRED	ese.ow	Person Wealth Engine Information has been updated		
10474	DEBORAH	BIGELOW	Person Wealth Engine Information has been updated		
10473	ROBERT	DILLINGSLEY	Person Wealth Engine Information has been updated		
6245	CAROLIN	BLASCO	Person Wealth Engine Information has been updated		
6244	GARY	BUCH	Person Wealth Engine Information has been updated		
68043	TERRY	DLISH	Person Wealth Engine Information has been updated		
17713	THOMAS	BOLINS	Person Wealth Engine Information has been updated		
6647	MUEX.	BRINGOMAN	Person Wealth Engine Information has been updated		
10045	JORI	BROOKS	Person Wealth Engine Information has been updated		
12644	LEN	EROUMERS	Person Wealth Engine Information has been updated		
100000000			TOTALS	Valid People - 200 Invatid People - 0 Total People - 200	

The total number of appended records is listed at the bottom as *Valid* vs *Invalid*. *Valid People* are *People Records* to which the WealthEngine data has been successfully appended. *Invalid People* are *People Records* that had issues or errors during the import process and the data wasn't appended. You'll want to investigate why they are *Invalid* and attempt the upload again. Call Allegiance Support if you would like our help.

At the top of the *Import Results* screen there is a printer icon that prints the results to a PDF and an Excel icon that allows you to download the *Import Results* to a spreadsheet.

Note: until you close this screen, you will be unable to do anything else in Allegiance. Should you find yourself clicking on other screens and nothing is happening, double-check to make sure that this screen isn't open.

Viewing WealthEngine Data on an Account

Once you have appended WealthEngine data to an account singly or through a batch, the WealthEngine tab will now appear with blue text on the *Account* screen, as shown below.



Click on the tab to view the appended data in each of the WealthEngine fields.

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ment Contents Diving Mar	Contraction Contractor	Incharante Social Media 100000 Econe		
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G Envelope Salut	tion ⁽²⁾ Deal	+ Telephone	+ Attached + People ID +	
rinary DOUG BEBER		Phone: (702) 4	S9-7796 12214	
Ratings Summary				
Date Created 5/14/2015	Date Updated	View Irighth Photole Vie	w Research Details Remove Wealth Profile	
P2G	2	Influence Rating	Bottom 25%	
P2G Description	Above Average	Inclination Affiliation	STRONG POLITICAL SUPPORT	
Giving Capacity Range	\$100K-\$200K	Inclination Giving	MODERATE DATED GIFT(S)	
Estimated Annual Donations	\$5K-\$10K	Dequest	YES	
Net Worth	\$1004-\$5MM	Arruity		
Total Assets	\$1MM-\$5MM	Trust	0	
Cash on Hand	\$10K-\$100K	Age	79	
visalth Summary				
Income Rating	\$100K-\$250K	Political Contributions	\$5K-\$10K	
Real Estate Value	\$500K-\$750K	Concerv Ownership Value	Unable to Rate	
Property Count	4	Boat Owner	NO	
Direct Stock Holdings	Unable to Rate	Aircraft Owner	NO	
Permise	Unable to Rate	Reard Member	POSSIBLE MATCH	