

Installing and using the Automated Data Cleanse by Sagacity

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1. Installation steps overview

1. Go to the Blackbaud [marketplace](#) and select the **Manage** option and then the **Connect app** button and enter the Application ID `f12dfa5e-e9a0-4f21-bb46-740a20a6adfd`
2. Now go back to 'Home' in the Raiser's Edge NXT environment and you can view the newly added 'Automated Data Cleanse' add-in tile there.
3. To connect to the application, click on 'Authorise'. You will be sent to the authorisation page where contact information can be inserted.
4. After authorisation the Sagacity and Blackbaud will be notified after which a representative of the organisation will contact you
5. Go to Configuration in database view and add new - Status Constituent Attribute/Custom field.

2. Installing the Automated Data Cleanse

Go to the Raiser's Edge NXT environment and search for the Automated Data Cleanse by Sagacity add-in in the Blackbaud marketplace (figure 1).

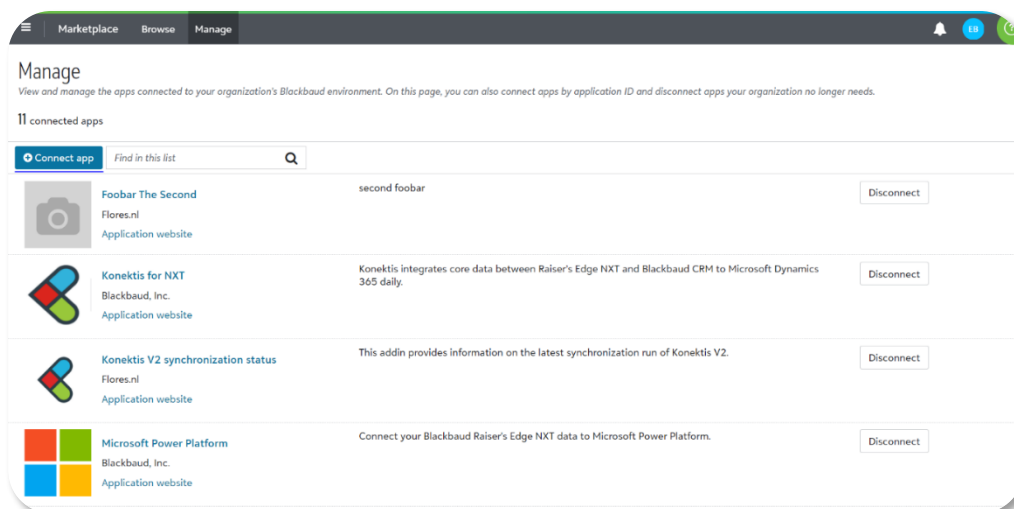


Figure 1 Blackbaud marketplace

Note:

When the application is not on the marketplace yet, you can connect to the application via the Client ID of the application. You can do this by going to the Marketplace and then clicking on the tab 'Manage' and 'Connect app'.

Fill in the Client ID of the application: `f12dfa5e-e9a0-4f21-bb46-740a20a6adfd` here and click on 'Connect' (figure 2).

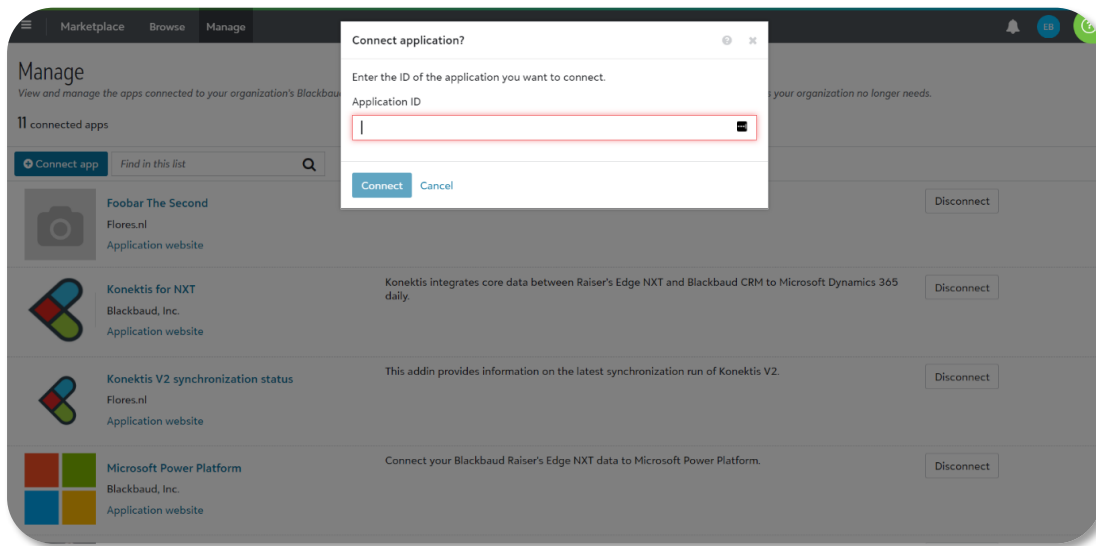


Figure 2

Connect to application via ID

Now go back to 'Home' in the Raiser's Edge NXT environment and you can view the newly added "Data Cleanse" tile there. **If you cannot see the tile scroll to the bottom of the page and it can then be dragged to the top of the of the screen (by selecting on the square in the top left-hand corner of the tile)** (figure 3).

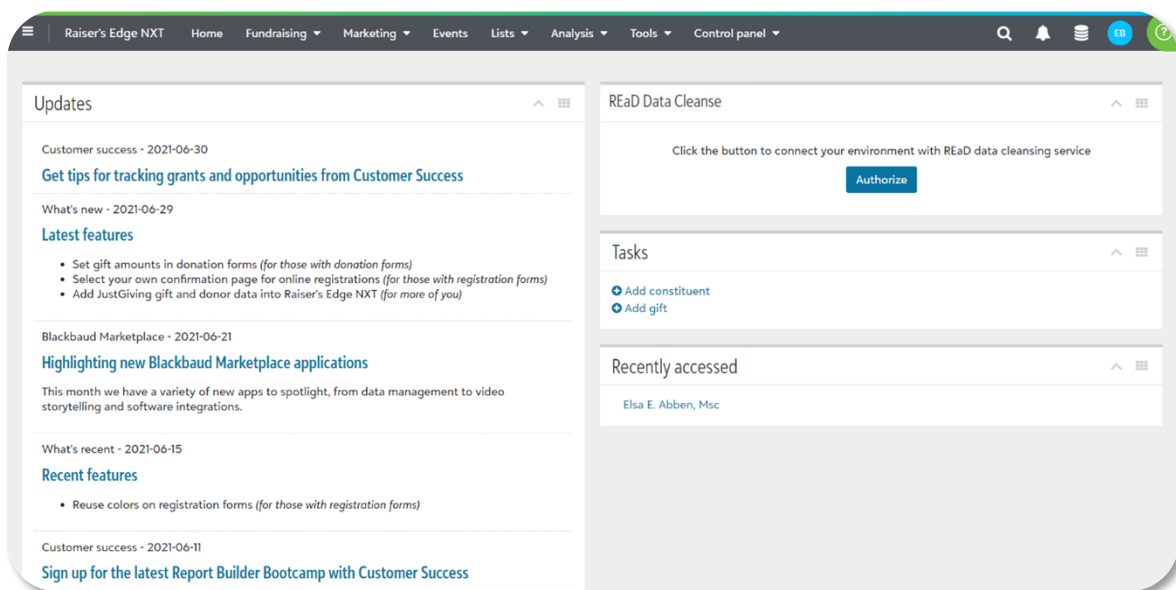


Figure 3 Data Cleanse tile

Sagacity

Note:

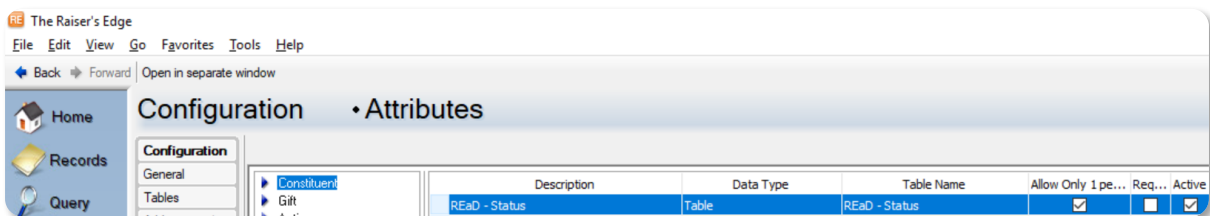
The app will try to mark constituents that are modified by it by setting a Constituent attribute: “Status”, it should be created with the type ‘Table’. If this attribute is defined within your Raiser’s Edge .NXT database, it will be set on constituent with one of the following possible values:

- Deceased
- Gone away
- Moved

Please be careful to use exactly the values as stated and not to use white spaces or dashes as this will cause issues.

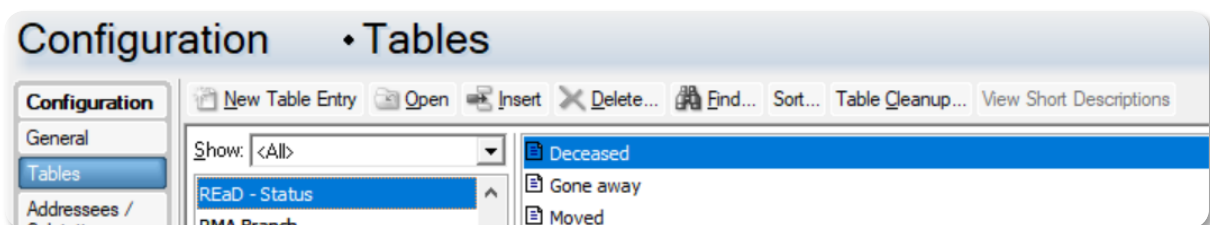
This allows you to easily query for changed records.

Ask your dba to add them to your Raiser’s Edge NXT environment. If you have the attributes defined, records will be marked and you can query on them. If you don’t have them defined, the system will continue running but does not mark your records.



The data type should be Table and a new user defined table added called Status. Check the Allow only 1 per Record and the Active checkboxes.

Add the three values to the new - Status table.



3. Authorise the Automated Data Cleanse

To connect to the application, you must then click on 'Authorise'. This will then send you to an authorisation page where contact information must be added to the form. (figure 4).

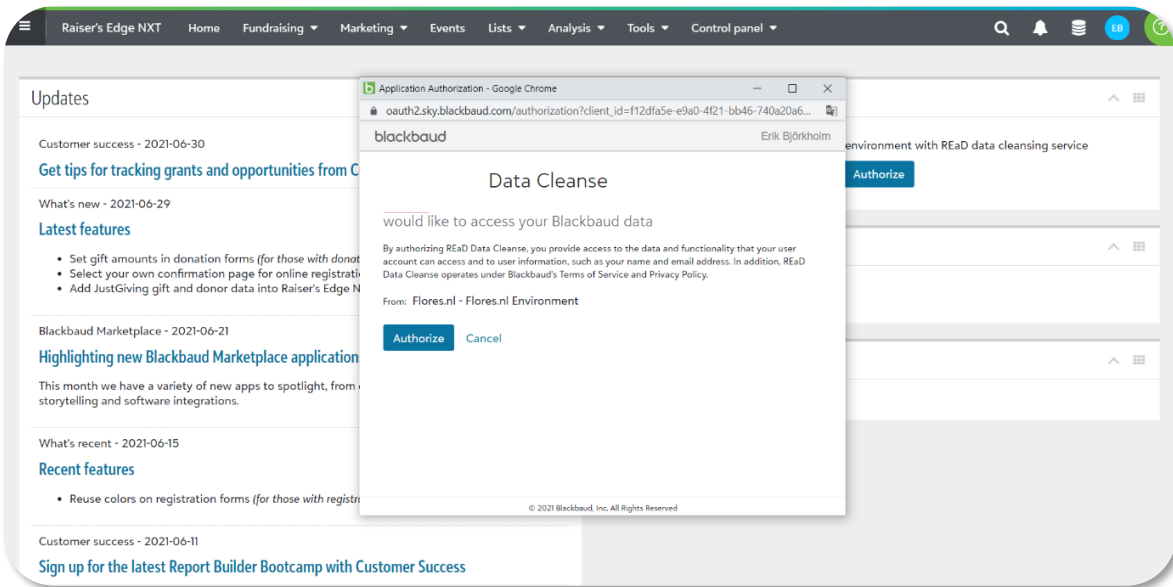
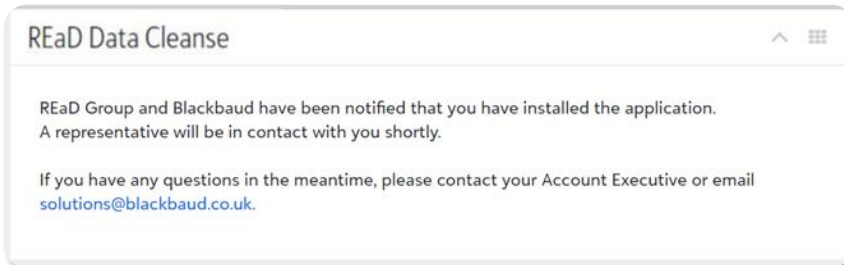


Figure 4 Authorisation page

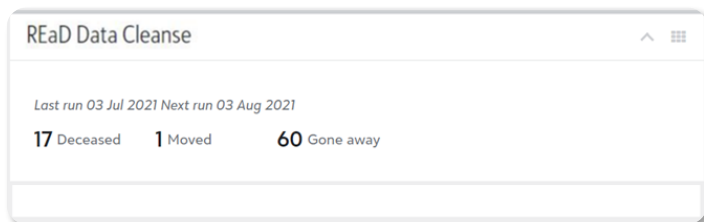
Once authorised, the add-will show the following message:



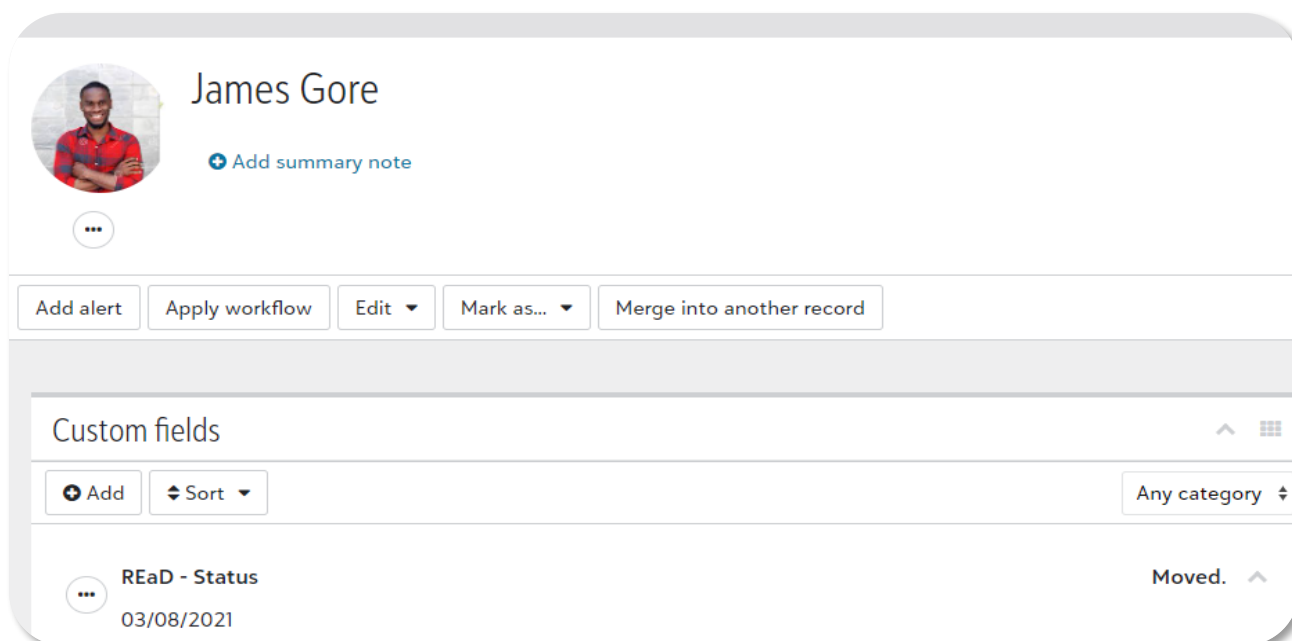
Please note: A representative will reach out to you with details of the associated subscription cost, once agreed you can move on to Step 4.

4. Using the Automated Data Cleanse

When your account has been activated by Sagacity, the Data Cleanse tile will show the following information: date of last run, date of next run and the statistics from the last run for Deceased, Goneaway and Moved records.



The relevant constituents are automatically updated after a run with the Attribute/Custom Fields and the Date of the run. (See image below)



5. Which address does Automated Data Cleanse match against?

The service holds **UK home addresses** and will compare these with the addresses marked as **Primary/Preferred** in your Raiser's Edge NXT database.