## The Raiser's Edge<sup>™</sup>

Import Tutorial

#### 013112

©2006 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

The Raiser's Edge, MatchFinder, ParaGon, RE:Alum, RE:Event, RE:Member, RE:Queue, RE:Tribute, RE:Volunteer, RE:Zip, RE:Open, and Blackbaud are registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7.81-ImportTutorial-2012

# Contents

What Is In This Tutorial?	/
MPORT TUTORIAL	L
mport File Layout Rules	6 2
NDEX	Ĺ

## What Is In This Tutorial?

In the *Import Tutorial*, you receive step-by-step instructions for creating imports in **The Raiser's Edge** and Microsoft *Excel*. You can also learn about the following.

- "Import File Layout Rules" on page 2
- "Constituent Imports" on page 6
- "Gifts" on page 52
- "Working with a Raiser's Edge Import File in Excel" on page 85

#### How Do I Use These Guides?

*The Raiser's Edge* user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser's Edge* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge 7* by accessing the help file in the program. Select Help, The Raiser's Edge Help Topics from the shell menu bar or press F1 on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.



# **Import Tutorial**

mport File Layout Rules		2
mport Formatting Guidelines		
mport IDs		
Attributes		4
mport Fields		4
mporting Gifts		4
ookup Tables		5
Addressee/Salutations		5
Currency entries		5
Defaults		5
Addresses		5
Relationships		6
Constituent Imports		6
Address Update		6
Relationships and Addresses in Excel	2	26
Constituent Attributes Import File	۷	ł1
Sifts	5	52
Creating and Importing Import Files using The Raiser's Edge	5	52
Creating Gift Import Files in Excel and Importing File into The Raiser's Edge	7	72
Norking with a Raiser's Edge Import File in Excel		

#### Procedures

Creating a constituent address import file in The Raiser's Edge	6
Importing the updated constituent address data back into The Raiser's Edge	17
Creating a constituent import in Excel with relationship and address	27
Importing an Excel import file with relationship, address, and phone information into The Raiser's Edge	32
Creating a constituent import with attribute information in Excel	41
Importing an Excel import file with attribute information to update existing The Raiser's Edge constituent re 44	cords
Creating a gift import in The Raiser's Edge	52
Importing the updated data back into The Raiser's Edge	62
Creating a gift import file using Excel	73
Importing an Excel gift import file into The Raiser's Edge	76
Working with a Raiser's Edge import file in Excel	85

#### 2 CHAPTER

**The Raiser's Edge 7** includes thousands of fields and can hold countless numbers of records. Updating and maintaining these records can be a daunting task. The **Import** functionality can make this chore a little less intimidating. With **Import**, you can combine databases, import information from spreadsheets and word processing programs, update existing records, and even create an import file to use in outside applications.

However, because **The Raiser's Edge** is a large program, offering so many different fields, running an import can at times be an involved procedure. You must know all the **Raiser's Edge** fields you want to include in the process; you must also know all fields required by the program to run the procedure; and you must understand that even if you learn all the fields required to run a specific type of import, the required fields are most likely different when you run a different type of import.

For example, to import a list of new individual Constituents, use the Constituent Import Type, and the Key Indicator and Last Name are required. However, to import a list of new addresses for existing constituents, use the Constituent Address Import Type, and you must include one of the following fields: Constituent ID, Constituent Import ID, or SSN. The field is used to identify the constituent to which each address belongs.

Note: For a complete list of required fields, see the Import Tables chapter in the Import Guide.

This tutorial attempts to take some of the guess work out of the importing process. In it are a number of the most common importing procedures. You learn how to create a gift and constituent import file in *The Raiser's Edge*, open these files in a Microsoft *Excel* spreadsheet, change the information, and import the updated data back into *The Raiser's Edge*. You also learn how to create an import file in *Excel* and then import the *Excel* data into *The Raiser's Edge*.

Most of the information included in this guide is specific to the tutorial procedures. For an overview of the importing process; explanations of all import fields, checkboxes, and options; and a list of the import layout tables, see the *Import Guide*.

## **Import File Layout Rules**

**Note**: We recommend you save your imports with detailed descriptions. This makes locating and identifying imports you want to reuse easier. For example, consider entering how the import was used or a summary of the fields you selected.

Before importing data into your database, you must fully understand how the importing process works, how it moves your data, and what determines where the program stores the new information. If done correctly, importing records into *The Raiser's Edge* is an easy, time-saving task. If done incorrectly, it may require a good deal of your time to clean up your database, running queries to ensure the information is where it is supposed to be, and even running global changes. We strongly recommend you acquire a full understanding of the importing process before proceeding with the import.

This section describes the general Import file layout rules, helping you better understand the overall process.

### Import Formatting Guidelines

• If you are not using a separate header file and on the File Layout tab of the import parameter screen you select **Field names will be on the first line of the import file**, the first line in an import file is the header line or row containing the Import Name of the fields included in the file. The remaining lines contain data records, one line per record. So, in a Constituent import, each constituent is given their own line; in a Gift import each gift is given its own line; in a Constituent Phone import each phone number is given its own line.

For instance, in the Microsoft *Excel* example below, line 1 represents the import header line. This line contains the names of the import data fields. The actual data starts on line 2.

	licrosoft Ex	cel - Book1										_ 8 ×
	<u>Eile E</u> dit <u>V</u> i	iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ool	ls <u>D</u> ata <u>W</u> ir	ndow <u>H</u> elp							_ & ×
	🖻 🖬 🗧	) 🖨 🖪	🌮 🐰 🖻	1 🖪 🗠 -	- 🍓 Σ	f∗ ĝ↓ 🛍	, 🛛 🔋 🛛	rial	• 1	Э 🔹 🖪 .	<u>ı</u> <u>u</u> "	🍌 Prompt
	C19	•	=									
	A	Print (A	Acrobat Distille	er 3.0)	E	F	G	Н		J	K	
1	ImportID	FirstName	LastName	Income	MrtlStat	KeyInd						
2		Smith	Brian	\$30,000	Single	1						
3		Kennedy	David	\$55,000	Married	1						
4		Davenport	Shawn	\$35,000	Married	1						

- If you choose the delimited import format on the General tab, the format of your import file must follow some specific rules, without which importing is impossible.
  - You must define a format for your imported data. This means, if you are using a word processor, you must use text qualifiers and field separators when entering your data.
  - The first line of the import file should be the header, which gives the names of the fields in the file. You can select to use data with the header record in a separate file. Or, if you have no field names anywhere, you can map the fields directly to **The Raiser's Edge** fields into which you want them imported.
  - Each record in the import file must have a Carriage Return-Line Feed (CR-LF) at the end
- Remember, when creating your import file in an outside application, such as *Excel*, the fields you can include in
  the import file are limited, based on the type of import you run. For example, if you want to import constituent
  information such as name, preferred address, and telephone number, you can enter all of this information in
  one import file and import the information using the **Constituent** import category. However, if you also want to
  import participant information for a constituent, such as name tag information and travel arrangements, you
  must enter this information in a separate import file. The participant information can be imported using only
  the **Participant** import category.

### Import IDs

• The program uses the IDs you define in the import to search for duplicates, update information, and link records.

When creating records through **Import**, you have the option of specifying an Import ID for the new record or letting the program create the ID. If you want to specify your own Import ID for record you create through **Import**, remember the following:

- Within a particular record type, all Import IDs must be unique. For example, all Constituent Import IDs must be unique, all Constituent Address Import IDs must be unique, etc.
- An ID can contain up to 20 characters

**Note**: If you use constituent Social Security Numbers as an identifier when importing records, you must include the dashes when entering the number in your import file.

When using Import to update records in The Raiser's Edge, the program needs to know which records you
want to update.

To specify in your import file which constituents you are updating, you can use the constituent's Social Security Number, Constituent ID, or Import ID to identify the record.

• In imports where you do not have to identify the constituent being modified, you need to specify the Import ID of the record you are attempting to update.

**Note**: Campaigns, funds, appeals, and events are exceptions to this rule. When updating these record types, you identify the records you want to update using the Campaign ID, Fund ID, Appeal ID, or Event ID.

For example, in a Constituent Address import, you must include a reference to the Constituent (Constituent ID, Constit Import ID, or SSN) in order to add or update information (add a new address or update an existing one). There are, however imports where information related to constituents change, but the constituent record does not need to be identified. For example, in a Constituent Phone import, to add or modify a phone number, you only need to reference an address import ID, because the address is inherently tied to a constituent.

• If you do not include the Import IDs when you create the import file through **Impor**t, you can add them later. Using the **Create Import File** option on the General tab of the import parameter file, you can export the Import IDs for the records you are trying to update.

## Attributes

- If in the **Attributes** link of *Configuration* the **Allow only one per Record** checkbox is checked for an attribute and the attribute is already present on the constituent record, the program generates an exception
- If in the **Attributes** link of *Configuration* the **Required** checkbox is checked for an attribute, the program generates exceptions for all records that do not include the attribute

## **Import Fields**

- Import fields may be imported in any order. We recommend grouping related fields.
- CR-LF is not allowed within a field, only at the end of a record
- CR-LF in memo fields (for example, notepad) is represented by /n
- Unmapped fields and fields containing no data are ignored. To clear a field's contents in the program, enter a caret (^) character [Shift + 6] in the field.
- Import fields for multiple records of the same type must have a two-digit extension number at the end. Extension numbers start with 00 and can go up to 99. For example, if you want to import home phone number and mobile phone number from constituent records, you must identify the home phone number (PhoneNum00) and the cellular phone number (PhoneNum01).
- When importing multiple "child" records of the same type for a single "parent" record, the import fields that relate to the child records must have a two-digit extension number at the end. Extension numbers start with 00 and can go up to 99. For example, if you want to import a home address and business address (two child records) for a single constituent (one parent record) on one line of a Constituent import, you must select some address fields twice, such as City and State. For the program to know which City goes with which State, it will look at the extension numbers. It will know that AddrCity00 goes with AddrState00, and AddrCity01 goes with AddrState01.
- Most record types making up the constituent record can be imported with a constituent import file or as their own import type. For example, you can import constituent codes with a Constituent import type or a Constituent Code import type.
- When importing both individuals and organizations using the Constituent import file, each record is specific to either an individual or an organization. The program ignores fields specific to organizations for individual records and ignores fields specific to individuals for organization records.

## Importing Gifts

- When importing gift records, remember the following:
  - Matching gifts do not automatically import with gift records. You can, however, import matching gifts specifically.
  - If you import a gift with a campaign or appeal but do not specify a fund, the gift appears as an exception. The fund is a required field.

- Benefit information does not default in the program with the gift information imported. You must include the benefit information in the import file if you want it to import.
- Receipt amounts do not default in the program with the gift information imported
- The program does not soft credit relationship records when importing gifts to a constituent record. However, you can import soft credit information specifically.
- If you import a gift along with an appeal or solicitor and the appeal or solicitor do not already exist in the constituent record, neither is automatically added to the record. They are, however, imported onto the gift.
- For gift import files, all installments must be in the same file as the pledge. Amounts must equal the total of the pledge. You can have the program automatically add instalments for new pledges.
- If you import a pledge, and you want the program to create installments, you must define the installment schedule in the import file and check the **Automatically add installments for new pledges** checkbox on the General tab of the import parameter file.

## Lookup Tables

- Punctuation characters and spaces are important for data contained in lookup tables. For example, the title table contains "Mr.", but your import file mistakenly has "MR" entered for one title. If you marked the **Create new table entries** checkbox on the General tab of the import parameter file, the program adds "MR" to the table, and you now have two table entries for the same title the correct title "Mr." and the incorrect title "MR".
- In most lookup tables, you can add table entries while importing if on the General tab in *Import*, you marked the **Create new table entries** checkbox.

## Addressee/Salutations

- You cannot add new addressee/salutations to the Addressee/Salutations table in Configuration through Import
- Use the Add/Sal ID number to import Addressee/Salutations for individuals and organizations. You can get a list of these numbers in *Configuration*. Select Addresses/Salutations. From the menu bar, select File, Print, Addressee/Salutations Report.

## **Currency entries**

- You can have up to 10 digits before the decimal point and two digits after (xxxxxxxx.yy)
- The currency symbol (\$) is not required
- The decimal point and digits after it are required only for uneven dollar units. For example, you can enter two hundred dollars as 200, but you must format twenty-five dollars and fifty cents as 25.50.

### Defaults

• Defaults established in the program do not carry over to imported data

### Addresses

- If you update an address linked to more than one constituent record, the address is updated in all linked records
- In order for the program to recognize separate address lines, (city, ZIP code), you must enter a /n at the end of the line in the file

**Note**: For more information about working on the Configuration page, see the Configuration chapter of the *Configuration & Security Guide*.

• All imported addresses are formatted based on the address format established through the **International** link on the Configuration page. If no country is specified in the import file, the address is formatted based on the address format entered through the **General** link on the Configuration page.

## Relationships

• You can reciprocate relationships when importing if you mark the **Automatically reciprocate relationships** checkbox on the General tab of the import parameter file.

## **Constituent Imports**

A constituent import adds information to existing constituent records in your database or creates new constituent records. For example, you can import information from a mailing list or a list of prospects into your database. To limit the number of fields available for the import, you can select specific constituent import types, such as Constituent Address or Individual Relationships. To view a list of fields available for each import type, see the Import Tables chapter of the *Import Guide*.

## Address Update

The following two procedures show you how to work with a constituent address import. The first procedure takes you step-by-step through generating a constituent address import file in **The Raiser's Edge**. You can then use the file to update your data, sending the file to an outside firm or entering changes using a spreadsheet or word processing program. The second procedure shows you how to import the updated constituent address import file back into **The Raiser's Edge**. You can also create an import file using an outside application, such as *Excel* or Microsoft *Word*. For instructions on creating an import file, using *Excel*, see "Relationships and Addresses in Excel" on page 26.

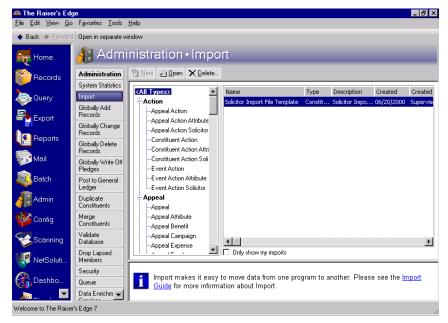
#### • Creating a constituent address import file in The Raiser's Edge

The following procedure shows you how to create an import file based on constituent records with the **Has no** valid addresses checkbox marked on the Bio 1 tab. The procedure assumes a query of all such records exists and includes the following fields in the import file: Address Import ID, Constituent Import ID, Address lines, City, State, and ZIP. Also, because there may be seasonal addresses included in the query, we will also include Seasonal Address, Seasonal From, and Seasonal To.

1. From the Raiser's Edge bar, click Admin. The Administration page appears.



2. Click Import. The Administration - Import screen appears.



All import types appear in the tree view.

3. Scroll down until you find **Constituent** on the tree view. Select **Constituent Address**.

4. On the action bar, click New. The Import - Constituent Address screen appears, displaying the General tab.

Import - Constituent Address		×
File Edit View Favorites To	ols Help	
🔲 🗙 📑 🖨 🗞 🗛	a ? -	
1: General 2: File Layout 3: Fi	ields 🔒 👍 Summary	
What do you want to do? (Import new records) (Update existing records) (Create import file)	Options Validate data only Create new table entries Import records not found as new records	
What file do you wish to in Import file:	nport?	
How do you want the syste	em to identify existing constituents?	
Use the Import ID		
C Use the Constituent ID		
O Use the Social Security No	umber	
What is the format of this i © Delimited - Characters sep © Fixed width - Fields and re	arate the fields	. of fields:
< Back Next > C	ancel <u>S</u> av	e Import No <u>w</u>

5. In the What do you want to do? frame, select Create import file.

Import - Constituent Address	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🥔 🖓 🛛	2 ·
1: General 2: File Layout 3: Fi	elds [ <u>4</u> : Summary ]
What do you want to do? Import new records Update existing records Create import file	Options Include All records C Include selected fields in the import file Include all fields in the import file
What file do you wish to c	reate?
Import file:	
What ID Field do you want	to use?
Use the Import ID	
C Use the Constituent ID	
O Use the Social Security Nu	Imber
What is the format of this i	mport file?
Delimited - Characters sep	arate the fields
C Fixed width - Fields and real	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > C	ancel Save Create Now

6. In the **Options** frame, click **Include** and select the records you want to include in your import file. Because you want only the records with **Has no valid addresses** marked on the Bio 1 tab of their constituent record, select **Selected records**. The Open Query screen appears.

🕂 Open Query	×
Find: Queries	
	🖨 🗍 Den
	Cancel
	🐌 Edit
	🎦 A <u>d</u> d New
	Options
	🙀 Eind Now
Find Queries that meet these <u>c</u> riteria:	
Query type: <all relevant="" types=""> 💌 Created On: 🔟</all>	Ne <u>w</u> Search
Query format:	Previous Search
Query name:	Q
Description:	
Show merged queries only	Expand <u>R</u> esults

**Note**: For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

7. In the **Query type** field, select "Constituent". You can enter additional criteria information to limit your query search, or you can click **Find Now** to locate all constituent queries saved in your database. All constituent queries appear in the grid.

🕅 Open Query					×
Find: Queries	V				
Query Name	Query Description	Туре	Format	<u> </u>	🔄 <u>O</u> pen
Inactive and Lost Con	Blackbaud sample con	Constituent	Dynamic	Super	Cancel
Inactive Records	This query is being us	Constituent	Dynamic	Super-	
Individual search for	Used by the Search S	Individual	Dynamic	Superv	
Invalid Address/Blank	This query is being us	Constituent	Dynamic	Superv	
Lapsed Members	Blackbaud sample con	Constituent	Dynamic	Superv	<u>الله الح</u>
Largest Gift +\$5,000	This query is based o	Constituent	Dynamic	Superv	
Major Donor Prospect	This query is used in $\ldots$	Constituent	Dynamic	Superv	裄 A <u>d</u> d New
Members (active and		Constituent	Dynamic	Superv	Options
No Constituent Code	Blackbaud sample con	Constituent	Dynamic	Superv	00000
No Valid Address		Constituent	Dynamic	Superv 🚽	
✓ Find Queries that meet the state of the state					💏 Eind Now
Query type: Cons		Created On:			Ne <u>w</u> Search
					Previous Search
Query format: Dyna	amic 💌	Created by:	▼		Elevious Search
Query name:	•				Q
Description:	•				
Show merged querie	es only 🔲 <u>E</u> xact	match only			Expand <u>R</u> esults

8. Select "No Valid Address" and click **Open**. You return to the Import - Constituent Address screen. The query name appears next to the **Include** button.

Import - Constituent Address	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🖨 🔓 🔥 i	a   ? •
<u>1</u> : General <u>2</u> : File Layout <u>3</u> : Fi	elds 4: Summary
What do you want to do? C Import new records C Update existing records	Options Include Selected records from 'No Valid Address'
Create import file	<ul> <li>Include selected fields in the import file</li> <li>Include all fields in the import file</li> </ul>
What file do you wish to c	reate?
Import file:	
What ID Field do you want	to use?
Use the Import ID	
O Use the Constituent ID	
O Use the Social Security Nu	umber
What is the format of this i	mport file?
Delimited - Characters sep	arate the fields
Fixed width - Fields and real	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack. <u>N</u> ext > C	ancel Save Create Now

9. In the **Options** frame, select **Include selected fields in the import file**. The program defaults to this option. When selected, on the Fields tab you must select and order the fields you want to include in your import file.

If you select the **Include all fields in the import file** option, all fields related to the selected import type are included in your import file. If you select this option, all the fields are automatically loaded on the Fields tab by field names. For this procedure, you do not want to select this option, because you know the specific fields you want to change and want only these fields in your import file.

10. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating. If you want to map to the specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.

Select Import Fil	e	? ×
Look in:	Import_Files	⇔ 🗈 📸 •
History Desktop My Documents	Appel_IDs.csv constit_attributes.txt Constit_IDs.csv ConstitAdv.csv ConstitAdv_2.csv Constituent_Address_Update.csv Constituent_Import.csv Constituents, 1Relationship, PrefAddr & 1Phone.csv DK_Import_Test.csv Gift_installment.csv Gifts.csv	∰ Gits_with_Installments.csv ∰ Gits_with_Installments_2.csv ∰ Test.csv ≝ Test.txt
My Computer		
Mu Mahurah D	File name: No Valid Address.csv	▼ Open
My Network P	Files of type: Text Files (*.txt; *.csv; *.pm)	Cancel

In this example, you want to save this import file in the Import\_Files folder.

**Note**: File names and the tools used to open import files is a matter of personal preference. The examples in this book represent one way of working with import files.

- 11. In the File name field, enter a name for this import file "No Valid Address".
- 12. In the **Files of type** field, select a format for the import file. Because you intend to work with this data in an outside application and import the updated information back into *The Raiser's Edge*, the \*.csv format is your best choice. It is the most universally accepted and easiest to work with. However, if you are sending this import file to an outside company to be updated, you may want to find out from the company what file types it can accept.
- 13. To return to the Import Constituent Address screen, click **Open**.

Import - Constituent Address		х
File Edit View Favorites To	ols Help	
🔲 🗙 📑 🖨 🗞 🛝 i	<b>御 ?</b> -	
1: General 2: File Layout 3: Fi	elds 🛛 <u>4</u> : Summary 🗋	_
What do you want to do?		
C Import new records	Options	
<ul> <li>Update existing records</li> </ul>	Include Selected records from 'No Valid Address'	
Create import file	<ul> <li>Include selected fields in the import file</li> </ul>	
	O Include all fields in the import file	
What file do you wish to c	reate?	
Import file: C:\Files\Import_File	ss\No Valid Address.csv	
What ID Field do you want	to use?	
Use the Import ID		
O Use the Constituent ID		
C Use the Social Security No	umber	
What is the format of this i	mport file?	
Delimited - Characters sep	arate the fields	
Fixed width - Fields and re-	cords have a set length Rec. length: No. of fields:	
< <u>B</u> ack <u>N</u> ext > C	ancel Save Create Now	!

The file name and path appear in the **Import file** field.

- 14. The **What ID field do you want to use?** frame, is not relevant to creating import files. This option applies when you update records. You tell the program which one of the ID options is in the import file. The IDs are used to identify the constituent record being updated.
- 15. In the **What is the format of this import file?** frame, select **Delimited Characters separate the fields**. This option is the easiest and most reliable format. When selected, on the File Layout tab you must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: "Phone", "Address", "Name". Carriage returns and line feed breaks separate records.

The **Fixed width** - **Fields and records have a set length** option requires you to define the length of the records you intend to import. Fields may be truncated if you do not know the length of all fields you include in your import file. For example, if you set the **First Name** field length at 20, all names with 20 characters or less import into the program complete. Any name over 20 characters is truncated at the 21st character. Also, the next field to import starts immediately after the 20th character, so if you have a 20-character field, there is no space between it and the next field. We do not recommend using this option unless it is required to import data provided from an outside organization, such as a research company or mail list provider.

16. To move to the File Layout tab, click Next.

Import - Constituent A	ddress	×
File Edit View Favori	ites Tools Help	
🔒 🛛 🔡 🔿 🖻	i 🛗 💣 📍	
1: General 2: File Layo	ut 3: Fields 4: Summary	
Field Separators and Tex	kt Qualifiers	-
Comma	Text qualifier: Quotation	
C Tab C Semicolon C Space	Please indicate the text qualifiers. The information found between two text qualifiers will be imported as is. Any field separators found between two text qualifiers will not be treated as a field separator.	
C Other	This allows you to distinguish between a field separator character and a character that is part of the data to be imported.	
Import Field Names		
<ul> <li>Field names will be</li> </ul>	on the first line of the import	
C Import file will not c	ontain field names	
C Field names will be	in a separate file	
< Back		
< <u>B</u> ack <u>N</u> ext>	Cancel Save Create Now	

17. In the **Field Separators and Text Qualifiers** frame, you have to tell the program how you want the import fields separated. The program defaults to the **Comma** field separator option. Although you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**, the comma is the most universally accepted.

The **Text qualifier** helps you distinguish between actual punctuation in a string of text and the field separator when you are reading the file. For example, if you select the comma as your field separator and quotation marks as the text qualifier, the program creates a text file containing the following data:

"100 Main Street, Apt. 23F", "San Diego", "CA"

You know all text contained between the text qualifier (quotation marks) is part of the same field. This helps you know that 100 Main Street, Apt. 23F is all part of the same field. If the quotation marks were not present the data appears as follows:

100 Main Street, Apt. 23F, San Diego, CA

You may not know if Apt. 23 F is part of the field that includes 100 Main Street or if it is its own field.

#### Note: For information about the other Import Field Names options, see the Import Guide.

For this procedure, accept the defaults: Comma and "Quotation".

18. In the Import Field Names frame, you have to tell the program if you want field names included in your import file, and, if so, what file you want them included in. For this procedure, because you want to know the field names when you update your import file addresses, select Field names will on the first line of the import file. This tells the program to make the first line in the import file the header, which contains the Import Name of the fields included in the file. The data starts in the second row, one record per row. So, in a Gift import, each gift is given its own line; in a Constituent Phone import each phone number is give its own line; in a Constituent record is given its own line.

19. To move to the Fields tab, click **Next**.

Import - Constituent Address	×
File Edit View Favorites Tools Help	3
🖬 🗙 📑 🖨 🗳 🕷 🖅 📍	•
1: General 2: File Layout 3: Fields 4:	Summary
Select the fields you wish to include in the	import file.
Available Fields	Import Fields
Show: <all fields=""></all>	Raiser's Edge Field
	Address Import ID (AddrImpID)
Click here for detailed field information.	
A Find Select ->	- Remove Update Fields Clear Fields
< <u>B</u> ack <u>N</u> ext≻ Cancel	<u>S</u> ave Create No <u>w</u>

Note: If on the General tab, you select Include all fields in the import file, all fields default in the Raiser's Edge Field box.

Because, on the General tab, you selected **Include selected fields in the import file**, only fields always required to update existing or add new constituent addresses automatically appear in the **Raiser's Edge Field** box. You must manually select the other fields you want to include in your import file.

20. From the **Available Fields** frame on the left, select the fields you want to include.

Import - Constituent Address	×
File Edit View Favorites Tools Help	3
🖬 🗙 📑 🖨 📬 👫 🖅 📍	•
<u>1</u> : General <u>2</u> : File Layout <u>3</u> : Fields <u>4</u> :	Summary
Select the fields you wish to include in the	import file.
-Available Fields	Import Fields
Show: <all fields=""></all>	Raiser's Edge Field
E Address 🔺	Address Import ID (AddrImpID)
Address Import ID	
CART	
City Constituent ID	
Constituent Import ID	
Constituent SSN	
County	
Date from	
Date to DPC	
Info source	
LOT NZ City	
Click here for detailed field information.	
Find Select ->	<- Remove Update Fields Clear Fields
< <u>B</u> ack <u>N</u> ext > Cancel	Save Create Now

In the tree view, highlight the fields you want to include in your import file, and click **Select** to move the field into the **Raiser's Edge Field** box. For this example, because you want to create an import file that you can also use to import updated data back into *The Raiser's Edge*, you must include either the **Constituent Import ID**, **Constituent ID**, or **SSN** when creating the file. Choose **Constituent Import ID** for this example. Next move all address information to be updated: **Address lines**, **City**, **State**, **ZIP**, **Seasonal Address**, **Seasonal from**, **Seasonal to**, and **Preferred Address**.

Import - Constituent Address	×				
<u>File Edit View Favorites Tools Help</u>					
🖬 🗙 📑 🖨 🚡 🖧 🖅 📍	•				
1: General 2: File Layout 3: Fields 4:	Summary				
Select the fields you wish to include in the	import file.				
Available Fields	Import Fields				
Show: <all fields=""></all>	Raiser's Edge Field				
Date to	Address Import ID (AddrImpID)				
DPCInfo source	Constituent Import ID (ImportID)				
-LOT	Address Lines (AddrLines)				
NZ City NZ Suburb	City (AddrCity)				
Preferred Address	State (AddrState)				
	ZIP (AddrZIP)				
Seasonal from	Seasonal Address (AddrSeasonal)				
Seasonal to	Seasonal from (AddrSeasFrom)				
State	Seasonal to (AddrSeasTo)				
-Type	Preferred Address (PrefAddr)				
Click here for detailed field information.	<- Remove Update Fields Clear Fields				
< <u>B</u> ack <u>N</u> ext > Cancel	Save Create Now				

**Note**: For a list of all available import fields and information about required fields, see the Import Tables chapter of the *Import Guide*.

21. To move to the Summary tab, click **Next**.

Import - Constituent Address	X
File Edit View Favorites Tools Help	
🖬 🗙 🚉 🖨 📬 🗰 🕐 -	
1: General 2: File Layout 3: Fields 4: Summary	
Import Options	
Create control report C Preview C Print	
Import Summary Information	
Type: Constituent Address File Name: C:\Files\Import_Files\No Valid Address.csv	
Field names are on the first line of the import file Fields are separated by Comma The text qualifier is a <quotation></quotation>	
These fields will be created: Address Import ID (AddrImpID) Constituent Import ID (ImportID) Address Lines (AddrLines) City (AddrCity) State (AddrState)	
ZIP (AddrZIP) Seasonal Address (AddrSeasonal) Seasonal from (AddrSeasFrom) Seasonal to (AddrSeasTo)	
< Back         Mext >         Cancel         Save         Create Now	Ī

Note: You can also select the tab to move through the import parameter file.

In the **Import Summary Information** frame, review the import parameters and other information selected for the import file.

22. To generate a report listing a summary of the results and the field mapping selected for the import, mark **Create control report**. The report also includes other information about the import, reasons for any exceptions, and the path where you saved the import file. Select **Preview** to view the report on your screen.

23. Click **Create Now**. The program processes the import file. The Import Complete! screen appears when the process is done.



This screen displays the number of records processed and created. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not process. To see what caused the exception, look in the Exceptions section of the control report.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

24. Click **Close**. The control report appears.

😭 N	ew Im	port Control/Sum	mary	Rep	ort										_ 8 ×
×		( 1 of 1	►			8	🕫 🍐	89%	•		两	Total:0	100%	0 of 0	
Pre	view														
							1	mpor	t Con	trol R	eport				
						Cre					ent addr	00000			
						010	Junig	mpon	1 110	conotina	oni adai	00000			
	ъ	sults													
	n	Records Processed	1: 14												
		Records In ported:													
		Records Up dated:													
		Records Created:	14												
		Exceptions :	0												
		Output query of re	cords i	in port	ted:										
		Output query of re		-											
		Exception file:	corus e	apante	eu.										
		iteria													
		Type:			at Add										
		File nam e:													
		Function:					NO Valio	1 Addres	s c sv						
					port fi										
		Options:						dAddress							
		ID Used:			lected	l fie lds	in the m	nport file	1						
		Header:	Impo												
		Format:	Delin			ortfile									
		Format.					comma								
						quotat									
	Fi	eld mapping	TEVE	daam	1161 15	quota									
		Import field name			D	's Edge	4.13								
		AddrImpID	•			ss Imp									
		ConsD				ituent l									
		AddrLines				ss Lin									
		AddrCity			City	se ruo									
		AddrState			State										
		AddrZIP			ZIP										
		Addr Seasonal		-		h A I s n	dress								<b>•</b>

The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.

- 25. To print the report, click **Print** on the toolbar at the top of the page.
- 26. To export the report to use in another application, click **Export** on the toolbar at the top of the page.
- 27. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.

28. To save the import parameter file, click Save. The Save Import As screen appears.

Save Impo	rt As	×
<u>N</u> ame:	No Valid Address	Save
Description:	10/10/2003	Cancel
	<ul> <li>✓ Other users may <u>r</u>un this import</li> <li>✓ Other users may <u>m</u>odify this import</li> </ul>	

- 29. Enter a Name and Description for your import. You can also allow other users access to the import file.
- 30. To return to the import parameter screen, click Save.
- 31. To exit the import parameter screen, from the menu bar, select File, Close.

**Note**: For information about working with an import file in *Excel*, see "Working with a Raiser's Edge Import File in Excel" on page 85.

You are now ready to have your import file updated. You can send the file to an outside agency that provides address updating services or open the file in another application, such as *Excel*, and update the information.

#### Importing the updated constituent address data back into The Raiser's Edge

After you make your changes to the import file, you can import the updated information back into **The Raiser's Edge** using the same import file.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.



2. Click Import. The Administration - Import screen appears.



All import types appear in the tree view.

- 3. Select Constituent Address under Constituent in the tree view.
- 4. From the action bar, click **New**. The Import Constituent Address screen appears, displaying the General tab.

Import - Constituent Address	×
File Edit View Favorites To	ols Help
🔜 🛛 🗶 📑 🖨 📬 🕅 1	a ? -
1: General 2: File Layout 3: Fi	elds 🛛 4: Summary 👌
What do you want to do?	
Import new records	Options
C Update existing records	Validate data only
	Create new table entries
Create import file	Import records not found as new records
What file do you wish to im	port?
Import file:	
	m to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
O Use the Social Security Nu	imber
What is the format of this i	mport file?
Delimited - Characters sep-	arate the fields
C Fixed width - Fields and rec	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack. <u>N</u> ext > C	ancel <u>S</u> ave Import No <u>w</u>

5. Because you are importing updates to existing records, in the **What do you want to do?** frame, select **Update existing records**.

Import - Constituent Address	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🖨 🗞 🕅 1	2 ·
1: General 2: File Layout 3: Fi	elds [ 4: Summary ]
What do you want to do?	· · · · · · · · · · · · · · · · · · ·
C Import new records	Options
Update existing records	Create new table entries
C Create import file	Import records not found as new records
What file do you wish to in	nport?
Import file:	
How do you want the syste	em to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
O Use the Social Security Nu	Imber
What is the format of this i	mport file?
Delimited - Characters sep	arate the fields
C Fixed width - Fields and real	cords have a set length Rec. length: No. of fields:
< Back <u>N</u> ext > C	ancel Save Update Now

- 6. In the **Options** frame, because you want to make sure your import file has all the required fields, mark the **Validate data only** checkbox. The **Update Now** button at the bottom of the screen changes to read **Validate Now**. After you set all of the import parameter tabs, you can click **Validate Now**, and the program identifies any required fields you may be missing in your import file before you import the new information into your database.
- 7. In the **Options** frame, do not mark **Create new table entries**. If marked, the program automatically creates new table entries for import fields with table entries not already entered in *The Raiser's Edge*. For this example, you do not mark the checkbox because it may result in misspelled and incorrectly formatted table entries. For example, title entries may appear in several different forms: MR., Mr, Mr.
- 8. Also in the **Options** frame, for this example, do not mark **Import records not found as new records**. If marked, the program automatically creates new records for any record in your import file that does not exist in *The Raiser's Edge*.

Because you are simply updating existing constituent address information, when you created your import file, you did not include all fields required to import new records. Therefore, you should not mark this option. However, from the Summary tab, you can select to create an exception file. Then if for some reason the program detects new constituent information in the import file during the updating process, it generates and saves an exception file. You can then review this information in the file and decide how you want it entered in *The Raiser's Edge*.

9. In the **What file do you wish to import** frame, you must enter the file name and the path of the import file you want to import into *The Raiser's Edge*.

If you want to map to the specific directory and subdirectory in which you saved the import file, click the ellipsis. The Select Import File screen appears.

Select Import Fi	e			? ×
Look in:	G Import_Files		+ 🗈 📸 🖬 -	
History Desktop My Documents	Constituent_Im	es.txt v :sv Idress_Update.csv port.csv Relationship, PrefAddr & 1Phone.csv st.csv	I Gits_with_Install         I Gits_with_Install         No Valid Addres         I Test.csv         Test.txt	ments_2.csv
My Computer	File name:	No Valid Address.csv		▶ Open
My Network P	Files of type:	Text Files (*.txt; *.csv; *.pm)		Cancel

You saved this import file in the Import\_Files folder.

10. Highlight the file name and click **Open** to return to the Import - Constituent Address screen.

Import - Constituent Address	Import - Constituent Address						
File Edit View Favorites Tools Help							
🔲 🗙 💐 🖨 🗞 🛝 i	🖬 🗙 🚉 🖨 🖍 📾 ? *						
1: General 2: File Layout 3: F	ields 4: Summary						
What do you want to do? C Import new records C Update existing records C Create import file	Options Validate data only Create new table entries Import records not found as new records						
What file do you wish to in Import file: C:\Files\Import_File							
How do you want the syste	em to identify existing constituents?						
Use the Import ID							
O Use the Constituent ID							
C Use the Social Security N	umber						
What is the format of this i © Delimited - Characters sep © Fixed width - Fields and re							
< <u>B</u> ack <u>N</u> ext > C	ancel Save Validate Now						

The selected file name and path appear in the Import file field.

- 11. In the **How do you want the system to identify existing constituents?** frame, select how you want the program to identify records in *The Raiser's Edge*. Select **Use the Import ID**. This is the field you have in the import file created in "Creating a constituent address import file in The Raiser's Edge" on page 6.
- 12. In the **What is the format of this import file?** frame, select **Delimited Characters separate the fields**. This is the format you selected when you created this import file.

13. To move to the File Layout tab, click **Next**.

Import - Constituent	Address			×			
File Edit View Fa	vorites Tools Help						
🖬 🗙 📑 🖨	🖬 🗙 💐 🖨 🔖 🗗 🖀						
<u>1</u> : General <u>2</u> : File La	1: General 2: File Layout 3: Fields 4: Summary						
Field Separators and	Field Separators and Text Qualifiers						
💿 Comma	Text qualifier: Qua	tation 💌					
⊂ Tab ⊂ Semicolon ⊂ Space		e text qualifiers. The ir is. Any field separato Id separator.					
C Other		distinguish between a lata to be imported.	field separator charac	ter and a character			
Import Field Names							
<ul> <li>Field names are</li> </ul>	on the first line of the i	mport file					
C Import file does	not contain field names	:					
C Field names are	in a separate file						
Sample Import Format							
AddrImpID	ImportID	AddrLines	AddrCity	AddrState 🔺			
00001-027-0000343	00001-079-0000187	1214 Miner's Court	Newport	RI			
00001-027-0000355	00001-079-0000187	915 Sycamore Dri	Athens	GA			
000001 007 0000071	00001.070.0000107	OTATO CHARLES DECEM	C				
< <u>B</u> ack	> Cancel		Save	e Validate No <u>w</u>			

The information on this tab should match the information selected when you created the import file in "Creating a constituent address import file in The Raiser's Edge" on page 6.

- 14. In the Field Separators and Text Qualifiers frame, select Comma. The program defaults to this option.
- 15. In the **Text qualifier** field, select "Quotation". The program defaults to this selection.
- 16. In the Import Field Names frame, select Field names are on the first line of the import file.

In the **Sample Import Format** frame, the program displays the field names and data included in your import file.

17. To move to the Fields tab, click Next.

Import - Constituent Address			×				
File Edit View Favorites Tools Help							
🖬 🗙 🚉 🖨 🗳 🖞 🖆 ? -							
1: General 2: File Layout 3: Fields 4: Summary							
Indicate where each 'Field to Import' shoul	ld go by choosing the Rais	er's Edge Field from the list o	f 'Available				
Fields'	- Import Fields						
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field	Exten				
	AddrImpID	Address Import ID (Ad					
±-Address	ImportID	Constituent Import ID					
	AddrLines	Address Lines (AddrLin					
	AddrCity	City (AddrCity)					
	AddrState	State (AddrState)					
	AddrZIP	ZIP (AddrZIP)					
	AddrSeasonal	Seasonal Address (Ad					
	AddrSeasFrom	Seasonal from (AddrS					
	AddrSeasTo	Seasonal to (AddrSeas					
Click here for detailed field information.	<- Remove	Update Fields Ck	ear Fields				
< <u>B</u> ack <u>Next&gt;</u> Cancel		<u>S</u> ave	/alidate No <u>w</u>				

**Note**: If you are not sure which fields are required for you import, in the **Show** field, click the drop-down arrow. From the drop-down menu, you can select to view all <Required fields> or <Conditionally required fields>.

18. If the *The Raiser's Edge* can read the header record syntax, the **Raiser's Edge Field** column automaps to the **Field to Import** column. If the program fails to automap, you must manually map the fields.

To manually map the fields, select the fields you want to include from the **Available Fields** frame on the left.

For example, in the **Field to Import** column on the right, highlight the first field you want to manually map: "AddrImpID". In the tree view on the left, select **Address Import ID** and click **Select** to move the field into the **Raiser's Edge Field** column in the "AddrImpID" row. Repeat this procedure for each unmapped field in the **Field to Import** column. For more information about the **Raiser's Edge** fields and how they correspond to the **Field to Import**, see the Import Tables chapter in the *Import Guide*.

19. To move to the Summary tab, click Next.

Import - Constituent Address	×						
File Edit View Favorites Tools Help							
🖬 🗙 🚉 🖨 📬 🗰 🖅 ? •							
1: General 2: File Layout 3: Fields 4: Summary							
Import Options	_						
Create exception file of records not updated/imported C:\Files\Import_Files\exceptions.imp							
Create an output query of the records imported							
Create an output query of the records updated							
Create control report  Preview Print							
Import Summary Information	-						
Type: Constituent Address File Name: C:\Files\Import_Files\No Valid Address.csv	<u> </u>						
Validate data only							
Field names are on the first line of the import file Fields are separated by Comma							
The text qualifier is a <quotation></quotation>							
These fields will be validated:							
Address Import ID (AddrImpID) Constituent ID (ConsID)							
Address Lines (AddrLines)							
City (AddrCity) State (AddrState)	•						
<u>&lt; Back</u> <u>Mext</u> Cancel <u>Save</u> Validate 1	MOM						

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

20. To create a file of all records the program fails to process, mark **Create exception file of records not** updated/imported. To browse to the folder in which you want the file saved, click the ellipsis. The Save As screen appears.

Save As		? ×
Look in:	🔁 Import_Files 💽 🔶 🖻	* 📰 -
History Desktop My Documents My Computer	in exceptions.imp In No Valid Address.imp	
	File name: exceptions.imp	Open
My Network P	Files of type: Import Files (*.imp)	Cancel

- 21. Enter a File name. For example, in this procedure, enter "exceptions".
- 22. In the **Files of type** field, select the type of file you want saved. We recommend saving it as an \*.imp or \*.csv.
- 23. Click **Open**. You return to the import parameter screen and the **File name** defaults into the field.

Note: You can use the output query to uncheck the no valid address box on the constituent record.

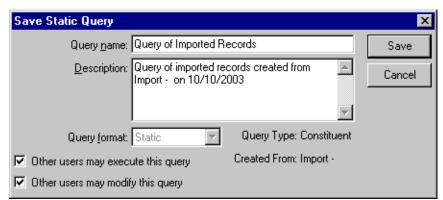
- 24. Mark the **Create an output query of the records updated** checkbox to create a query of all records updated. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.
- 25. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.
- 26. Click **Validate Now**. The program validates the import file. The Import Complete screen appears. If no Exceptions are recorded, you are ready to import the data. If any Exceptions are recorded, click **Close**. The Control Report appears, listing any exceptions.

Import - The Raiser's Edge for Windows								
0.28 0 00 00 00 00 00 00 00 00 00 00 00 00	Import Com	plete!						
	Records Processed:	19						
	Records Added:	0						
	Records Updated:	0						
	Exceptions:	0						
	Total Time:	00:00:01						
	Records / sec:	19.00						
Cata asser		Close						

27. After you validate your import file, return to the General tab. Unmark the Validate data only checkbox.

Import - Constituent Address		×							
File Edit View Favorites To	ols Help								
🖬 🔀 🏥 🖨 📬 🗛 🖆 ? *									
1: General 2: File Layout 3: Fields 4: Summary									
What do you want to do? Import new records Update existing records Create import file	Options Validate data only Create new table entries Import records not found as new records								
What file do you wish to in	port?								
Import file: C:\Files\Import_File	es\No Valid Address.csv								
How do you want the syste	em to identify existing constituents?								
Use the Import ID									
C Use the Constituent ID									
C Use the Social Security Nu	imber								
What is the format of this i	mport file?	,							
Delimited - Characters separate the fields									
C Fixed width - Fields and rea	cords have a set length Rec. length: No. (	of fields:							
< <u>B</u> ack <u>N</u> ext > C	ancel <u>S</u> ave	Update No <u>w</u>							

28. Click Update Now. The Save Static Query screen appears.



29. Enter a **Query name** and **Description**. You can also allow others to use and modify your query.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

30. Click **Save**. The program processes the update. When the process is complete, the Import Complete! screen appears.

Import - The Raiser's Edge for Windows							
0.28 8 A00 00 00 00 00 00 00 00 00 00 00 00 00	Import Com	plete!					
	Records Processed:	19					
	Records Added:	0					
	Records Updated:	19					
	Exceptions:	0					
	Total Time:	00:00:02					
	Records / sec:	9.50					
		Close					

This screen displays the number of records processed, added, and updated. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not process. To see what caused the exception, look in the Exceptions section of the control report.

31. Click Close. The Control Report appears.

Ne 🛛	w Imp	ort Control/Sum	nary Re	port										_ 8 ×
×		1 of 1			8	۶ 👌	89%	•		緧	Total:0	100%	0 of 0	
Prev	iew													
	_			_		1	mpor	t Cor	ntrol Re	port				<b>A</b>
					Cre				constitue	-	esses			
	Ren													
		Records Processed												
		Records Imported:	0											
		Records Up dated:	0											
		Records Created:	14											
		Exceptions :	0											
		Output query of re-	ords in po	rte d:										
		Output query of re-	ords upda	te d:										
		Exception file:												
	Cuit	eria												
		Type:	Constitue	ent Ad	dre ss									
		File nam e:	C:\Files\	Import	FilesW	o Vali	1 Addres	is c sv						
			Create in											
		Options:	Selected	record	s from 'l	No Vali	dAddres	s'						
			Include s	e lecter	l fields i	n the ir	nport fil	e						
		ID Used:	Import II	>										
		Header:	First line	of im	ortfile									
		Form at:	D e linn ite	d										
			Fields ar	e separ	ate d by	comma	L							
			Te xt qua	lifier is	; quotati	on								
	Fiel	l mapping												
		Import field name		Raise	's Edge:	field								
		AddrImp ID		Addr	ess Impo	rt ID								
		ConsID Constituent ID												
		AddrLines		Addr	ess Line	;								
		A ddr City		City										
		A ddr State		State										
		AddrZIP		ZIP										
		Addr Seasonal		Seaso	nal Add	ress								•
_				-										

The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.

- 32. To print the report, click **Print** on the toolbar at the top of the page.
- 33. To export the report to use in another application, click **Export** on the toolbar at the top of the page.
- 34. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.
- 35. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.

Save Impo	Save Import As 🛛 🗙								
<u>N</u> ame:	No Valid Address	Save							
Description:	Updated 10/10/2003	Cancel							
	<ul> <li>Other users may <u>r</u>un this import</li> <li>✓ Other users may <u>m</u>odify this import</li> </ul>								

- 36. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import file.
- 37. Click Save. You return to the import parameter screen.
- 38. To exit the import parameter screen, select File, Close.

#### Relationships and Addresses in Excel

**Import** easily moves large blocks of data in and out of **The Raiser's Edge**. However, complex data may result in a complex import. For example, data may include constituent relationships or several constituent addresses. If so, additional fields may be needed, and you may need to import the data using multiple imports. Also, the required import fields change, depending on whether you are importing new records or importing updated data.

Creating an import file in an outside application, such as *Excel*, may prove more difficult than creating a file using *The Raiser's Edge*. You must look up all the import fields you want to include in the process, find all required fields, and manually enter this information in a spreadsheet.

The following two procedures show you how to work with just such an import. The first procedure takes you step-by-step through creating the constituent import file in *Excel*. The second procedure shows you how to import the new import file into *The Raiser's Edge*.

#### > Creating a constituent import in Excel with relationship and address

The following examples show you how to create an import file with a header and include relationships, addresses, and telephone numbers.

	licrosoft	Excel	- Book1												_ 8	×
	<u>Eile E</u> dit	⊻iew	Insert	Format	<u>T</u> ools	<u>D</u> ata <u>W</u> in	idow <u>H</u> elp	Acrobat							_ 8	x
	🖻 🔒	a (	s 🛯	**° 🕺	6	🛍 🔊 🖥	Σ 🥵 ν	f* 🛃 🛍	. 🕐 😤 🗚	rial	- 1	0 <b>- B</b>	ΙU	+.0 .00	.00 +.0	×
<u> </u>	A1	-		=										_		1
	Α		В	C		D	E	F	G	Н	1	J	K		L	
1																
2																
3																
4														_		
5 6	-													_		
7														_		
-é	-													-		
8 9														-		
10																
11																
12																
13																
12 13 14 15 16														_		
15														_		
	-													_		
17	-													_		
19	-													_		
20														-		
17 18 19 20 21 22 23 24 25														_		
22																
23																
24																_
25																•
		iheet 1	/ Sheet	2 / Shee	t3 /					1						Г
Rei	ady															Ĩ

1. Open an Excel spreadsheet.

Depending on the type of import you want to run, certain fields are required. All required fields are listed in the Import Tables chapter of the *Import Guide*.

For this procedure, you want to create a constituent import to import new constituents into **The Raiser's Edge**. In addition to the name and address/phone information fields that you want to include in your import file, you must include any required fields listed in the Constituent Imports section of the Import Tables chapter of the *Import Guide*.

The following chart displays in the **Field Name** column all **The Raiser's Edge** fields you want to include in your import file. The **Import Name** column displays how the corresponding field name is represented in the import file, and the **Requirements** column explains why and when certain fields are required. This information is taken from the Import Tables chapter of the *Import Guide*.

#### **Constituent Fields**

Field Name	Import Name	Requirements
Key Indicator	KeyInd	Required to add new
Birth date	Bday	
Ethnicity	Ethnicity	
First Name	FirstName	

Field Name	Import Name	Requirements
Last Name	LastName	Required to add new individuals
Marital Status	MrtlStat	
Middle Name	MidName	
Primary Addressee ID Number	PrimAddID	
Primary Salutation ID Number	PrimSalID	
SSN	SSNum	A unique identification number is required to import records into <b>The</b> <b>Raiser's Edge</b> . You can use the Import ID, Constituent ID, or Social Security Number. For this example, because we are creating an import file of new constituents using <i>Excel</i> and we are choosing not to assign an Import ID or Constituent ID, select to use SSN.
Title 1	Titl1	

**Note**: Organization Name is not included in the table because this example is adding new individual constituent records only.

This section of the *Excel* spreadsheet should look similar to the following screen.

M	Microsoft Excel - Test.csv										
	B _ Ele _Edit Yiew Insert Format Iools Data Window Help Acrobat										
	□ 🛩 🖬 🗇 🕼 😲 🐰 🖻 🖻 🗠 🔹 ૨ 🐅 🛃 🏨 🕄 🖓 Aial 🔹 10 💌 Β Ζ Ψ ≡ Ξ Ξ 😤										
	7										
	C24	•	=								
	A	В	С	D	E	F	G	Н	1	J	K 🗖
1	KeyInd	Bday	Ethnicity	FirstName	LastName	MrtlStat	MidName	PrimAddID	PrimSallD	SSNum	Titl1
2	1	*****	Caucasian	Denise	Kadilak	Married	Marie			654-90-789	Ms.
3	1	########	Caucasian	Elizabeth	Ashton	Married	Ann		3	234 65 099	Mrs.
4	1	########	Indian	Mohammed	Rahman	Married	Married		2	876-09-123	Mr.
5	1	########	African-Am	Keith	Radcliffe	Single	Dwayne			265-34-233	General
6						-					

#### **Preferred Address Fields**

Field Name	Import Name	Requirements
Address Import ID	AddrImpID	Always required to update existing; required to import new when phone numbers are included in the import file. If you are importing only new address information with your new constituent import, you do not have to assign an Address Import ID to each address. The program automatically assigns the Address Import ID if one is not specified in the import file. However, if you are importing new telephone information for the new constituent address, you have to specify a unique Address Import ID for each new address because you use this Address Import ID to <i>link</i> the phone number to a specific address. You reference this ID when adding a phone number for this address.
Address Lines	AddrLines	
City	AddrCity	
Preferred address	PrefAddr	
State	AddrState	
ZIP	AddrZIP	
Туре	AddrType	

This section of the *Excel* spreadsheet should look similar to the following screen.

N I	licrosoft Excel - Te	st.csv							_ 8	×
	<u>File E</u> dit ⊻iew Inse	rt F <u>o</u> rmat <u>T</u> ools	Data <u>W</u> indow <u>H</u> e	elp Acro <u>b</u> at					_ 8	×
	🖻 🖬 🔒 🎒	à 🚏 🐰 🗈 I	🗈 🗠 🔹	Σ <i>f</i> ∗ <mark>2</mark> ↓ 🛍	🕐 🙄 Arial		• 10 • B	ΙĽ	ī≣≣≣	» •
	1 🔁									
	L24 💌	=								_
	L	M	N	0	P	Q		R		
1	AddrimpID	AddrLines	AddrCity	PrefAddr	AddrState	AddrZIP	AddrType			
2	999-999	25 Water St.	Poland	Y	Ohio	44514	Home			
3	888-888	310 Broad St.	Charleston	Y	SC	29401	Home			
4	777-777	2233 Jonathan I	Cleveland	Y	Ohio	44149	Home			
		40 T 11 01	AL 1 1	V	SC	20/01	Home			
5	666-666	12 Tradd St.	Charleston	Y	au	23401	Home			

#### **Phone Fields**

Field Name	Import Name	Requirements				
Address Import ID	PhoneAddrImpI D	Required to add new <b>and</b> update existing; this should match an existing Address Import ID or an Address Import ID in the same line of the import file.				
Phone ID	PhoneImpID	Required to add new <b>and</b> update existing; if you do not assign a unique ID for a phone number, the program automatically creates on during import.				
Phone number	PhoneNum					
Phone type	PhoneType	Required to add new				

This section of the *Excel* spreadsheet should look similar to the following screen.

	dicrosoft Excel - Test.csv							_ 🗗 ×
	<u>File E</u> dit <u>V</u> iew <u>I</u> nsert F <u>o</u> rmat	<u>T</u> ools <u>D</u> ata <u>W</u> indow	Help Acrobat					_ 8 ×
	🖻 🖬 🔒 🎒 🖏 🚏 👗	🛍 💼 🗠 + 🎙	🛔 Σ 🕫 🛃 🚺	💄 🝳 义 Arial	•	10 <b>- B</b>	ΙÜ	≣≣ ₹
1	1 🔁							
	AB24 - =							
	AB	AC	AD	AE	AF	AG	AH	AI 🔒
1	PhoneAddrimpID	PhoneImpID	PhoneNum	PhoneType				_
2	999-999		843-853-7913	Home				
3	888-888		843-987-0987	Home				
4	777-777		330-123-5487	Home				
5	666-666		412-765-3948	Home				
6								

#### **Relationship Fields**

Field Name	Import Name	Requirements
First Name	IRFirstName	
Is Spouse	IRIsSpouse	
Last Name	IRLastName	Required to add new individuals if the relationship is a non-constituent
Maiden name	IRMaidName	
Middle Name	IRMidName	
Reciprocal	IRRecip	
Relationship	IRRelat	

Field Name	Import Name	Requirements
Relationship Import ID	IRImpID	Required to update existing
Title 1	IRTitl1	

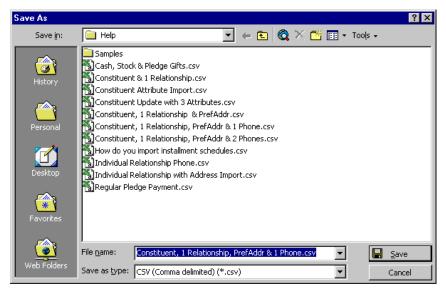
**Warning**: When working in *Excel*, the last column must contain data for each record. Therefore, we recommend placing a required field in the last column.

This section of the *Excel* spreadsheet should look similar to the following screen.

R I	💥 Microsoft Excel - Test.csv 📃 🗗 🔀										
	Bile Edit View Insert Format Iools Data Window Help Acrobat										
	□ 🖆 🖬 🖨 🕼 🖏 🐇 🖻 💼 🗠 ▾ 🍓 Σ ≉ 斜 🏙 🕄 ❣ Aial 🔹 ▾ 10 ▾ B Ι U 📰 등 등 등 ?										
_	S24 ▼ =										
	S	Т	U	V	W	X	Y	Z	AA 🔒		
1	IRFirstName	IRIsSpouse	IRLastName	IRMaidName	IRMidName	IRRecip	IRRelat	IRImpID	IRTitl1		
2	Steve	Yes	Kadilak		John	Wife	Husband		Mr.		
3	Robert	Yes	Jones		Bradly	Wife	Husband		Mr.		
4	Susan	Yes	Rahman	Sikes		Husband	Wife		Mrs.		
5											
6											

**Warning**: In the **AddrImpID** column, you must assign a unique value and enter the same value in the **PhoneAddrImpID** column.

- 2. When entering your import file data, at the end of each row of data, make sure to include a hard break (ENTER key).
- 3. To save the import file, select **File**, **Save as** from the menu bar. The Save As screen appears.



4. In the **File name** field, enter the name of your file.

Warning: When you attempt to close the Excel file, the program may require you to repeat steps 3-6.

- 5. In the **Save as type** field, select a format for the file. *The Raiser's Edge* can import files saved with a \*.csv, .\*imp, \*.txt, and \*.prn extensions. However, we recommend the \*.csv (comma separated value), as the most user-friendly with *The Raiser's Edge*.
- 6. Click Save.

- 7. You are now ready to import the *Excel* import file into *The Raiser's Edge*.
- Importing an Excel import file with relationship, address, and phone information into The Raiser's Edge After you create your import file, using *Excel* (or some other spreadsheet software), you can import the information into *The Raiser's Edge*.
  - 1. On the Raiser's Edge bar, click Admin. The Administration page appears.



2. Click Import. The Administration - Import screen appears.



All import types appear in a tree view on the left side of the screen. Scroll down until you find **Constituent**.

3. Select **Constituent** under **Constituent** from the tree view.

4. On the action bar, click **New**. The Import - Constituent screen appears, displaying the General tab.

Import - Constituent	×
File Edit View Favorites To	ools Help
🖬 🗙 💐 🖨 📬 🔥	🕋 🗧 -
1: General 2: File Layout 3: F	ields 4: Summary
What do you want to do? Import new records Update existing records	Options
C Create import file	Create new table entries  Import records not found as new records  Automatically reciprocate relationships Use duplicate criteria for new records
What file do you wish to in Import file:	
How do you want the syst	em to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
O Use the Social Security N	umber
What is the format of this © Delimited - Characters sep © Fixed width - Fields and re	
< <u>B</u> ack <u>N</u> ext > C	Cancel Save Import Now

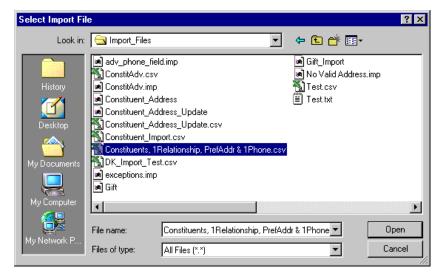
- 5. Because you are importing new records, in the **What do you want to do?** frame, select **Import new records**.
- 6. In the **Options** frame, because you want to make sure your import file has all of the required fields, mark the **Validate data only** checkbox. The **Import Now** button at the bottom of the screen changes to read **Validate Now**. After you set all of the import parameter tabs, you can click **Validate Now**, and the program identifies any required fields you may be missing in your import file before you import the new information into your database.
- 7. In the **Options** frame, do not mark **Create new table entries**. If marked, the program automatically creates new table entries for import fields with table entries not already entered in *The Raiser's Edge*. For this example, you do not mark the checkbox because it may result in misspelled and incorrectly formatted table entries. For example, title entries may appear in several different forms: MR., Mr, Mr.
- 8. Also in the **Options** frame, mark **Automatically reciprocate relationships**. This checkbox appears for constituent, individual relationship, and organization relationship imports only. If marked, the program automatically adds the relationship and the reciprocal relationship on the relationship's record if the relationship is a constituent. However, the program fills in the **Relationship** and **Reciprocal** fields only if values for the **Relationship** and **Reciprocal** fields are included in the import file.

**Note:** For more information about establishing duplicate criteria, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.

9. Finally in the **Options** frame, mark **Use duplicate criteria for new records**. Before importing new records, the program searches for duplicate records, using the duplicate criteria established in **Business Rules**.

Import - Constituent	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🖨 📬 🗰 i	a ?-
1: General 2: File Layout 3: Fi	ields 🛛 <u>4</u> : Summary 🕽
What do you want to do?	
Import new records	Options
C Update existing records	Validate data only
C Create import file	Create new table entries Import records Import records
Create import me	Automatically reciprocate relationships
	Use duplicate criteria for new records
Sal 1 1 1 1 1 1 1 1 1 1 1	
What file do you wish to in	nport ?
Import file:	
How do you want the syste	em to identify existing constituents?
Use the Import ID	, ,
C Use the Constituent ID	
C Use the Social Security N	umber
What is the format of this i	mport file?
<ul> <li>Delimited - Characters sep</li> </ul>	•
	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > C	ancel Save Validate Now

10. In the **What file do you wish to import?** frame, enter the name and path of the import file you want to import. Click the ellipsis to access the Select Import File screen.



11. Map to and select the import file.

12. Click **Open**. You return to the import parameter screen.

Import - Constituent	×
File Edit View Favorites To	ools Help
🔒 🗙 📑 🖨 🗳 🔥	🕋 ? ·
1: General 2: File Layout 3: F	ields 4: Summary
What do you want to do? Import new records	Options
O Update existing records	Create new table entries
C Create import file	F Import records not found as new records
	Automatically reciprocate relationships
	Use duplicate criteria for new records
What file do you wish to in	nport?
Import file: C:\Ms\MS\Import	Files\Constituents, 1Relationship, PrefAddr & 1Phone.csv
How do you want the syst	em to identify existing constituents?
O Use the Import ID	
C Use the Constituent ID	
Use the Social Security N	umber
What is the format of this	import file?
Delimited - Characters sep	parate the fields
C Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > C	ancel Save Validate Now

The import file name and path appear in the **Import file** field.

- 13. In the How do you want the system to identify existing constituents? frame, select Use the Social Security Number. This is the identifier you included in your import file.
- 14. In the What is the format of this import file frame, because you know the import file is saved as a \*.csv, select Delimited Characters separate the fields.

The **Fixed width - Fields and records have a set length** option requires you to define the length of the records you intend to import. Fields may be truncated if you do not know the length of all fields you include in your import file. For example, if you set the **First Name** field length at 20, all names with 20 characters or less import into the program complete. Any name over 20 characters is truncated at the 21st character. Also, the next field to import starts immediately after the 20th character, so if you have a 20-character field, there is no space between it and the next field. We do not recommend using this option unless it is required to import data provided from an outside organization, such as a research company or mail list provider.

15. To move to the File Layout tab, click **Next**.

Import - Constitue	ent			×					
File Edit View I	Favorites Tools He	elp							
🖬 🛛 🗙 📑 🖉	) 🔓 🕅 🖅 🥇	• •							
1: General 2: File Layout 3: Fields 4: Summary									
Field Separators ar	Field Separators and Text Qualifiers								
Comma	Text qualifier:	Juotation 🔽							
⊂ Tab ⊂ Semicolon ⊂ Space	Please indicate will be imported	the text qualifiers. T		etween two text qualifiers two text qualifiers will not					
C Other		i to distinguish between ne data to be imported		aracter and a character					
Import Field Names	s								
<ul> <li>Field names a</li> </ul>	are on the first line of th	ne import file							
C Import file doe	es not contain field na	mes							
O Field names a	are in a separate file								
Sample Import Format									
KeyInd	SSNum	Bday	Ethnicity	FirstName 🔺					
I	394-78-5512	04/23/1965	Caucasian	Joseph 📃					
I	233-26-5948	04/27/1956	Caucasian	Elizabeth					
	200 53 1153	00/00/4054	C	Mail.					
< <u>B</u> ack	ext > Cancel		2	Save Validate No <u>w</u>					

The information on this tab should match the the import file formatting.

- 16. Because you selected the \*.csv (commas separate values) format when you saved your import file in *Excel*, in the **Field Separators and Text Qualifiers** frame, select **Comma**.
- 17. Because you created your import file in *Excel*, and *Excel* puts only quotes around field values, in the **Text qualifier** field select "Quotation".
- 18. In the **Import Field Names** frame, select **Field names are on the first line of the import file**. The program then knows the first row of your import file contains a header. The actual data starts on the second row of the import file.

In the **Sample Import Format** frame, the program displays the field names and data included in your import file.

19. To move to the Fields tab, click **Next**.

Import - Constituent File Edit View Favorites Tools Help	)		X					
	•							
<u>1</u> : General <u>2</u> : File Layout <u>3</u> : Fields <u>4</u> :								
Indicate where each 'Field to Import' should go by choosing the Raiser's Edge Field from the list of 'Available Fields'								
- Available Fields	Import Fields							
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field	Exten.					
🖅 Additional Addressee/Salutati 🛋	IRLastName	Last Name (IRLastName)						
	IRMaidName	Maiden Name (IRMaid						
EnAlias	IRMidName	Middle Name (IRMidNa						
itirAppeal	IRRecip	Reciprocal (IRRecip)						
⊕-Availability È-Award	IRRelat	Relationship (IRRelat)						
	IRImpID	Relationship Import ID						
€-Constituent Attribute €-Constituent Bank	IRTitl1	Title 1 (IRTitl1)						
ter-Constituent Code	PhoneAddrImpID	Address Import ID (Ph						
	PhoneImpID	Phone Import ID (Pho						
Eredit Card	PhoneNum	Phone Number (Phone						
	PhoneType	Phone Type (PhoneTy						
<u>Click here</u> for detailed field information.								
Find Select ->	<-Remove	Update Fields Clea	ar Fields					
< <u>B</u> ack <u>N</u> ext > Cancel		<u>S</u> ave Va	alidate No <u>w</u>					

**Note**: If you are not sure which fields are required for you import, in the **Show** field, click the drop-down arrow. From the drop-down menu, you can select to view all <Required fields> or <Conditionally required fields>.

- 20. The **Raiser's Edge Field** column automaps to all **Field to Import** fields it can identify. Because you included only preferred address information in your import file, you do not need to complete the **Extension** column. This column is used to identify field information when you include more than one of the same field types (address, telephone numbers, attributes) in your import file.
- 21. If the program fails to automap, you must manually map the import fields. To manually map the fields, select the fields you want to include from the **Available Fields** frame on the left.

For example, to map ConsID in **Field to Import** column to a **Raiser's Edge** field, highlight ConsID in **Field to Import** column. In the tree view on the left, highlight "Constituent ID" and click **Select** to move the field into the **Raiser's Edge Field** column in the ConsID row. Repeat this procedure for each field you must manually map. For more information about the **Raiser's Edge** fields and how they correspond to the **Field to Import**, see the Import Tables chapter in the *Import Guide*.

22. To move to the Summary tab, click Next.

Import - Constituent 🗙
File Edit View Favorites Tools Help
🖬 🗙 🚉 🖨 🖍 🖆 ? ·
1: General 2: File Layout 3: Fields 4: Summary
Import Options
Create exception file of records not updated/imported C:\Ms\MS\ImportExceptions\exceptions.imp
Create an output query of the records imported
Create an output query of the records updated
Create control report
Import Summary Information
Type: Constituent File Name: C:\Ms\MS\Import_Files\Constituents, 1Relationship, PrefAddr & 1Phone.csv
Relationships will automatically be reciprocated Validate data only
Field names are on the first line of the import file Fields are separated by Comma The text qualifier is a <quotation></quotation>
These fields will be validated: Key Indicator (KeyInd) SSN (SSNum) Bith Date (Bday) Ethnicity (Ethnicity)
< Back         Mext>         Cancel         Save         Validate Now

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

23. To create a file of all records the program fails to process, mark **Create exception file of records not** updated/imported. To browse to the folder in which you want the file saved, click the ellipsis. The Save As screen appears.

Save As		? ×
Look in:	🔄 Import_Files 💽 🔶 🖆 🖽	•
History Desktop My Documents My Computer	in exceptions.imp In No Valid Address.imp	
	File name: exceptions.imp	Open
My Network P	Files of type: Import Files (*.imp)	Cancel

- 24. Enter a File name.
- 25. In the **Files of type** field, select the type of file you want saved.
- 26. Click Open. You return to the import parameter screen. The File name appears in the field.
- 27. Mark the **Create an output query of the records imported** checkbox to create a query of all records imported. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.

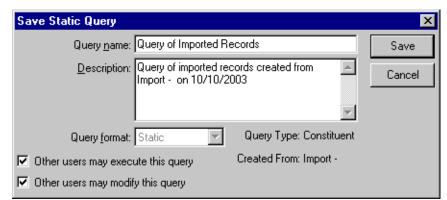
- 28. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.
- 29. Click **Validate Now**. The program validates the import file. The Import Complete screen appears. If no Exceptions are recorded, you are ready to import the data. If any Exceptions are recorded, click **Close**. The Control Report appears, listing any exceptions.



30. After you validate your import file, return to the General tab. Unmark the Validate data only checkbox.

Import - Constituent	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🖨 🗞 🗛	ar ? -
1: General 2: File Layout 3: Fi	ields   <u>4</u> : Summary
What do you want to do? Import new records Update existing records C Create import file	Options Validate data only Create new table entries Import records not found as new records Automatically reciprocate relationships Use duplicate criteria for new records
What file do you wish to in	nport?
Import file: C:\Ms\MS\Import_	Files\Constituents, 1Relationship, PrefAddr & 1Phone.csv
How do you want the syste	em to identify existing constituents?
C Use the Import ID	
C Use the Constituent ID	
Output Security No.	umber
What is the format of this i	import file?
Delimited - Characters sep	
C Fixed width - Fields and re	cords have a set length Rec. length. No. of fields:
< <u>B</u> ack <u>N</u> ext > C	ancel Save Import Now

31. Click Import Now. The Save Static Query screen appears.



32. Enter a Query name and Description. You can also allow others to use and modify your query.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

33. Click **Save**. The program processes the update. When the process is complete, the Import Complete! screen appears.

Import - The Raiser's Edge for Windows				
0.28 <b>0 00</b> 00 00 00	Import Com	plete!		
	Records Processed:	231		
	Records Added:	231		
	Records Updated:	0		
	Exceptions:	0		
	Total Time:	00:00:38		
	Records / sec:	6.08		
		Close		

This screen displays the number of records processed, added, and updated. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not update. To see what caused the exception, look in the Exceptions section of the control report.

Click **Close**. The Control Report appears. The report displays the results of the import, the criteria entered on the import parameter file, and the field mapping. Scroll down to locate details about any exceptions.

- 34. To print the report, click **Print** on the toolbar at the top of the page.
- 35. To export the report to another application, click **Export** on the toolbar at the top of the page.
- 36. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.

37. When you are finished with the import file, on the import parameter screen, click **Save** to save the file. The Save Import As screen appears.

Save Impo	Save Import As				
<u>N</u> ame:	Constituent Relationship with Address Info	Save			
Description:	10/10/2003	Cancel			
	<ul> <li>Other users may <u>r</u>un this import</li> <li>Other users may <u>m</u>odify this import</li> </ul>				

- 38. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import file.
- 39. Click Save. You return to the import parameter screen.
- 40. To exit the import parameter screen, from the menu bar select File, Close.

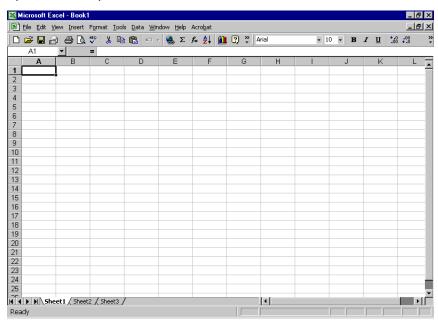
### **Constituent Attributes Import File**

The following two procedures show you how to work with constituent import with attribute fields. The first procedure takes you step-by-step through creating a constituent import file in *Excel*. The second procedure shows you how to import the new import file into *The Raiser's Edge*.

• Creating a constituent import with attribute information in Excel

The following examples show you how to create an import file with a header.

1. Open an *Excel* spreadsheet.



Depending on the type of import you want to run, certain fields are required. All required fields are listed in the Import Tables chapter of the *Import Guide*.

For this procedure, you want to create a constituent import to import new attributes for existing constituents in *The Raiser's Edge*. In addition to the attribute information fields you want to include in your import file, you must include any required fields listed in the Constituent Attributes Fields section of the Import Tables chapter of the *Import Guide*.

The following chart displays in the **Field Name** column all **The Raiser's Edge** fields you want to include in your import file. The **Import Name** column displays how the corresponding field name is represented in the import file, and the **Requirements** column explains why and when certain fields are required. This information is taken from the Import Tables chapter of the *Import Guide*.

Field Name	Import Name	Requirements
Constituent ID	ConsID	Either the constituent's Social Security Number, Import ID, or Constituent ID is required to add new attributes or update existing attributes. You can generate a list of all Constituent IDs assigned to records in <i>The Raiser's Edge</i> by creating a constituent import file of Constituent IDs. You can then use this information in your spreadsheet import file.
Category	CAttrCat	Required to add new
Comments	CAttrCom	
Date	CAttrDate	
Description	CAttrDesc	

**Warning**: When working in *Excel*, the last column must contain data for each record. Therefore, we recommend placing a required field, such as Key Indicator, in the last column.

2. Enter header information on the first row of the spreadsheet. The following screen shot shows how your import file header should look in an *Excel* spreadsheet, based on the information included in the table.

M	Microsoft Excel - Constit_Attri.csv									_ 🖪 ×
	Bile Edit View Insert Format Iools Data Window Help Acrobat									_ 8 ×
	D 😅 🖬 🔒 🚭 🔃 ♥ 🐰 🗈 🏝 🖘 ▾ 🍓 Σ 🏍 斜 🛍 🕄 ♥ Arial 🔹 🔹 10 ▾ B Ζ U 📰 😤									* 🔤
	1									
	A24	▼ =								
	Α	В	C	D	E	F	G	Н		
1	ConsID	CAttrCat	CAttrDesc	CAttrCom	CAttrDate					
2	556	Interests	Cooking	Indian food	05/05/2004					
3	556	Anniversary	04-Apr	Wedding date	05/05/2004					
4	556	Special Mailin	One Solicitation F	Don't call at ho	05/05/2004					
5										
6										
7										

3. Starting in the second row of the spreadsheet, you can enter the data you want to import.

**Warning**: Attribute categories entered in the import file must exist in *The Raiser's Edge*. You enter attribute categories from the Configuration page. For more information, see the Configuration chapter of the *Configuration & Security Guide*.

For instance, in the preceding example, for the first "CAttrCat" import name, "Interests" is the attribute category and for the first "CAttrDes" import name, "Cooking" is the description.

- 4. At the end of each row of data, make sure to include a hard break (ENTER key).
- 5. After you enter all the data you want to import into *The Raiser's Edge*, to save the import file, select **File**, **Save as** from the menu bar. The Save As screen appears.

Save As		? ×
Save in:	🔁 Samples 💌 🖛 🔁 🚳 🗙 📸 🕶 Tools -	
History	Constit.csv Constit_Attri.csv Constit_relationships.csv Gifts.csv	
My Documents	Import_IDs.csv Installment.csv Pledge_Pay.csv	
Desktop		
Favorites		
My Network	I File name: Constit_Attri.csv	ve
Places	Save as type: CSV (Comma delimited) (*.csv)	ncel

- 6. Enter the name of your file in the **File name** field.
- In the Save as type field, select a format for the file. The Raiser's Edge can import files saved with a \*.csv, \*.txt, and \*.prn extensions. However, we recommend the \*.csv (comma separated value) as the most user-friendly with The Raiser's Edge.

Warning: When you attempt to close the Excel file, the program may require you to repeat steps 5-7.

8. Click Save. You are now ready to import the *Excel* import file into *The Raiser's Edge*.

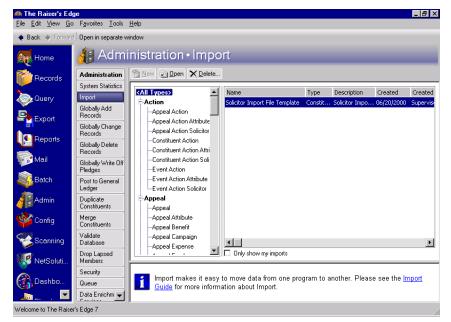
Importing an Excel import file with attribute information to update existing The Raiser's Edge constituent records

After you create your import file, using *Excel* (or some other spreadsheet software), you can import the information into *The Raiser's Edge*.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.



2. Click Import. The Administration - Import screen appears.



All import types appear in a tree view on the left side of the screen.

3. Select Constituent Attribute under Constituent from the tree view.

4. On the action bar, click **New**. The Import - Constituent screen appears, displaying the General tab.

Import - Constituent	×		
File Edit View Favorites To	ools Help		
🖬 🗙 📑 🖨 🖬 🗛	a .		
1: General 2: File Layout 3: F	ields   <u>4</u> : Summary		
What do you want to do?			
Import new records	Options		
O Update existing records	Create new table entries		
C Create import file	Import records not found as new records		
	Automatically reciprocate relationships		
	Use duplicate criteria for new records		
What file do you wish to ir	novit?		
Import file:			
How do you want the system	em to identify existing constituents?		
Use the Import ID			
O Use the Constituent ID			
O Use the Social Security Number			
What is the format of this	import file?		
O Delimited - Characters separate the fields			
C Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:		
< <u>B</u> ack <u>N</u> ext > C	ancel Save Import Now		

- 5. Because you are importing new constituent attributes and this is an Constituent Attribute import, in the **What do you want to do?** frame, select **Import new records**.
- 6. In the **Options** frame, because you want to make sure your import file has all of the required fields, mark the **Validate data only** checkbox. The **Import Now** button at the bottom of the screen changes to read **Validate Now**. After you set all of the import parameter tabs, you can click **Validate Now**, and the program identifies any required fields you may be missing in your import file before you import the new information into your database.
- 7. In the **Options** frame, for this example, do not mark **Create new table entries**. If marked, the program automatically creates new table entries for import fields with table entries not already entered in *The Raiser's Edge*. Be careful when selecting this option. This may result in misspellings and incorrect formatting. For example, title entries may appear in several different forms: MR., Mr.

Note: For more information about establishing duplicate criteria, see the Configuration & Security Guide.

8. In the **What file do you wish to import** frame, enter the name and path of the import file you want to import into *The Raiser's Edge*.

If you want to map to the specific directory and subdirectory in which you saved the import file, click the ellipsis. The Select Import File screen appears.

Select Import Fi	e				? ×
Look in:	🔁 Samples		•	🗢 🗈 💣 🎟•	
History Desktop My Documents My Computer	Constit.csv Constit_Attri.csv Constit_relations Gifts.csv Import_IDs.csv Installment.csv	ships.csv			
	File name:	constit.csv		•	Open
My Network P	Files of type:	All Files (*.*)		•	Cancel

9. Highlight the file name and click **Open** to return to the Import screen.

Import - Constituent Attribute		х
File Edit View Favorites To	ools Help	
🔲 🗙 📑 🖨 🗞 🕅	🕋 ? -	
1: General 2: File Layout 3: Fi	ields 4: Summary	
What do you want to do?		-
Import new records	Options	
C Update existing records	Validate data only Create new table entries	
C Create import file	Import records not found as new records	
)u(hat file de yeu wich te in	ne st2	
What file do you wish to in	·	
Import file: C:\Files\Import_File	es\Constit_Attri.csv	J
How do you want the syste	em to identify existing constituents?	-
C Use the Import ID		
Use the Constituent ID		
C Use the Social Security Number		
What is the format of this i	import file?	-
Delimited - Characters separate the fields		
C Fixed width - Fields and real	cords have a set length Rec. length: No. of fields:	
< <u>B</u> ack <u>N</u> ext > C	Cancel Save Validate N	o <u>w</u>

The selected file name and path appear in the **Import file** field.

- 10. In the **How do you want the system to identify existing constituents?** frame, select how you want the program to identify records in *The Raiser's Edge*. Select **Use the Constituent ID** because this is the ID you have in your import file.
- 11. In the **What is the format of this import file?** frame, select **Delimited Characters separate the fields**. This is the format you selected when you saved your import file.

The **Fixed width** - **Fields and records have a set length** option requires you to define the length of the records you intend to import. Fields may be truncated if you do not know the length of all fields you include in your import file. For example, if you set the **First Name** field length at 20, all names with 20 characters or less import into the program complete. Any name over 20 characters is truncated at the 21st character. Also, the next field to import starts immediately after the 20th character, so if you have a 20-character field, there is no space between it and the next field. We do not recommend using this option unless it is required to import data provided from an outside organization, such as a research company or mail list provider.

Note: You can also select the tab to move through the import parameter file.

12. To move to the File Layout tab, click Next.

Import - Constituent	t Attribute			×
File Edit View Fa	vorites Tools Helj	D		
🖬 🛛 🗶 📑 🖨	🚡 🕺 🗃 🤶	•		
1: General 2: File L	ayout 3: Fields 4:	Summary		
Field Separators and	Text Qualifiers			
Comma	Text qualifier: Q	uotation 🔻		
⊂ Tab ⊂ Semicolon ⊂ Space		the text qualifiers. The as is. Any field separat ield separator.		
C Other		o distinguish between data to be imported.	a field separator charac	cter and a character
Import Field Names				
Field names are	on the first line of the	e import file		
C Import file does	not contain field nam	es		
C Field names are	in a separate file			
Sample Import Format		·		
ConsID	CAttrCat	CAttrDesc	CAttrCom	CAttrDate
556	Interests	Cooking	Indian Food	05/05/2004
556	Anniversary	04/04/2000	Wedding Date	05/05/2004
<b>I</b>	Constant Mariliana	0 C-8-8-9	···-₩₩ -×	
< <u>B</u> ack	t> Cancel		<u>S</u> av	e Validate No <u>w</u>

The information on this tab should match the the import file formatting.

- 13. Because you selected the \*.csv (commas separate values) format when you saved your import file in *Excel*, in the **Field Separators and Text Qualifiers** frame select **Comma**.
- 14. Because you created your import file in *Excel* and *Excel* puts only quotes around field values, in the **Text qualifier** field select, "Quotation".
- 15. In the **Import Field Names** frame, select **Field names are on the first line of the import file**. The program then knows the first row of your import file contains a header. The actual data starts on the second row of the import file.

In the **Sample Import Format** frame, the program displays the field names and data included in your import file.

16. To move to the Fields tab, click Next.

Import - Constituent Attribute		
File Edit View Favorites Tools Help		
🔒 🗙 📑 🖨 🗳 🗰 💣 📍	-	
1: General 2: File Layout 3: Fields 4:	Summary	
Indicate where each 'Field to Import' should Fields'	d go by choosing the Raiser's I	Edge Field from the list of 'Available
- Available Fields	- Import Fields	
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field
E-Constituent Attribute	ConsID	Constituent ID (ConsID)
	CAttrCat	Category (CAttrCat)
	CAttrDesc	Description (CAttrDesc)
	CAttrCom	Comments (CAttrCom)
	CAttrDate	Date (CAttrDate)
Click here for detailed field information.	<- Remove	Update Fields Clear Fields
< <u>B</u> ack <u>N</u> ext> Cancel		Save Validate No <u>w</u>

17. The Raiser's Edge Field column automaps to all Field to Import fields it can identify.

Also, in the **Extension** column, the program assigns extension numbers to each attribute category. Because this example has only one category, just the "00" extension is necessary. If you add a second attribute category, the program would assign it a "01" extension.

18. To move to the Summary tab, click Next.

Import - Constituent Attribute
File Edit View Favorites Tools Help
🖬 🗙 🛃 🖨 🖍 💣 📍
1: General 2: File Layout 3: Fields 4: Summary
Import Options
Create exception file of records not updated/imported C:\Files\Import_Files\exceptions.imp
Create an output query of the records imported
Create an output query of the records updated
Create control report  Preview  Print
Import Summary Information
Type: Constituent Attribute File Name: C:\Files\Import_Files\Constit_Attri.csv
Validate data only
Field names are on the first line of the import file Fields are separated by Comma The text qualifier is a <quotation></quotation>
These fields will be validated: Constituent ID (ConsID) Category (CAttrCat) Description (CAttrDesc) Comments (CAttrCom) Date (CAttrDate)
Kext>         Cancel         Save         Validate Now

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

19. To create a file of all records the program fails to process, mark the **Create exception file of records not** updated/imported checkbox. To browse to the folder in which you want the file saved, click the ellipsis. The Save As screen appears.

Save As		? ×
Look in:	🔁 Import_Files 💽 🖛 🖻 💣	<b>*</b>
History Desktop My Documents My Computer	i exceptions.imp I No Valid Address.imp	
	File name: exceptions.imp	Open
My Network P	Files of type: Import Files (*.imp)	Cancel

- 20. Enter a File name. For this procedure, enter "exception.imp".
- 21. In the Files of type field, select the type of file you want saved. We recommend selecting \*.imp or \*.csv.
- 22. Click **Open**. You return to the import parameter screen.
- 23. Mark the **Create an output query of the records imported** checkbox to create a query of all new records created during the update. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.

- 24. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.
- 25. Click **Validate Now**. The program validates the import file. The Import Complete screen appears. If no Exceptions are recorded, you are ready to import the data. If any Exceptions are recorded, click **Close**. The Control Report appears, listing any exceptions.



26. After you validate your import file and correct any exceptions, return to the General tab. Unmark the **Validate data only** checkbox.

Import - Constituent Attribute	×	
File Edit View Favorites To	ols Help	
🔲 🗙 📑 🖨 🗳 🔥	雪 ?·	
1: General 2: File Layout 3: F	ields [ <u>4</u> : Summary ]	
What do you want to do? Import new records Update existing records C Create import file	Options Validate data only Create new table entries Import records not found as new records	
What file do you wish to in Import file: C:\Files\Import_Fil	· · · · · · · · · · · · · · · · · · ·	
How do you want the syste	em to identify existing constituents?	
C Use the Import ID		
Use the Constituent ID		
O Use the Social Security N	umber	
What is the format of this import file?         Image: Delimited - Characters separate the fields         Image: De		
< Back Next > C	ancel Save Import Now	

27. Click **Import Now**. Because you marked the **Create an output query of the records imported** checkbox on the Summary tab, the Save Static Query screen appears.

Save Static Query	×
Query name: Constituent Attributes	Save
Description: 10/10/2003	Cancel
<b>V</b>	
Query format: Static Query Type: Constituent	
✓ Other users may execute this query Created From: Import -	
✓ Other users may modify this query	

- 28. Enter a Query name and Description. You can also allow others to use and modify your query.
- 29. Click **Save**. Because you marked the **Create an output query of the records updated** checkbox on the Summary tab, a second Save Static Query screen appears. Complete the fields on the screen.
- 30. Click **Save**. The program processes the import. When the process is complete, the Import Complete! screen appears.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

This screen displays the number of records processed, added, and updated. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not process. To see what caused the exception, look in the Exceptions section of the control report.

- 31. Click **Close**. The Control Report appears. The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.
- 32. To print the report, click **Print** on the toolbar at the top of the page.
- 33. To export the report to another application, click **Export** on the toolbar at the top of the page.
- 34. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.
- 35. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.

Save Impo	rt As	×
<u>N</u> ame:	Constituent Attributes	Save
Description:	10/10/2003	Cancel
	<ul> <li>Other users may <u>r</u>un this import</li> <li>Other users may <u>m</u>odify this import</li> </ul>	

- 36. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import file.
- 37. Click **Save**. You return to the import parameter screen.
- 38. To exit the import parameter screen, from the menu bar select File, Close.

# Gifts

A gift import adds information to existing gift records in your database or creates new gift records. For example, you can import all gift pledges raised at a phonathon. The gifts then appear on the Gifts tab of the constituent records. You can select Gift, Gift Attribute, Gift Benefit, Installment, Matching Gift Pledge, Pledge Payment, Soft Credit, Split Gift, Tribute Gift, Gift Solicitor, Write-Off, Gift Notepad, or Recurring Gift Payment to limit the fields available for your import.

## Creating and Importing Import Files using The Raiser's Edge

The following two procedures take you step-by-step through generating a gift import file in **The Raiser's Edge**. You can then use the file to update your data, send the file to an outside firm, or enter changes using a spreadsheet or word processing program. The second procedure shows you how to import the updated gift import file back into **The Raiser's Edge**. You can also create an import file using an outside application, such as *Excel* or *Word*.

### • Creating a gift import in The Raiser's Edge

The following procedure shows you how to create an import file based on gift records committed to your database using *Batch*. Because you want to change only the records in the batch, you need a query of the batch records. The procedure assumes a query of all records included in the batch exists and includes the following import fields: Gift Import ID, Fund ID, Gift Date, Gift Type, Gift Amount, Import ID, Receipt, Receipt Amount, and Receipt Date.



1. From the Raiser's Edge bar, select Admin. The Administration page appears.



2. Click Import. The Administration - Import screen appears.

All import types appear in a tree view on the left side of the screen. Scroll down until you find Gift.

- 3. Select Gift under Gift from the tree view.
- 4. On the action bar, click **New**. The Import Gift screen appears, displaying the General tab.

Import - Gift	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🖨 📬 🗰 (	a ?-
1: General 2: File Layout 3: F	ields 🛛 <u>4</u> : Summary
What do you want to do? © Import new records O Update existing records O Create import file	Options Validate data only Create new table entries Import records not found as new records Automatically add installments for new pledges
What file do you wish to in	nport?
Import file:	
How do you want the syste	em to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
C Use the Social Security N	umber
What is the format of this i	import file?
Delimited - Characters sep	arate the fields
O Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > C	ancel Save Import Now

5. In the What do you want to do? frame, select Create import file.

Import - Gift	×
File Edit View Favorites To	ols Help
🔲 🗙 📑 🥔 🖓 🕯	a ?•
1: General 2: File Layout 3: Fi	elds 🔄 🛓: Summary 📔
What do you want to do? C Import new records C Update existing records C Create import file	Options Include All records
Create import file	<ul> <li>Include selected fields in the import file</li> <li>Include all fields in the import file</li> </ul>
What file do you wish to c	reate?
Import file:	
What ID Field do you want	to use?
Use the Import ID	
C Use the Constituent ID	
C Use the Social Security Nu	umber
What is the format of this i	mport file?
Delimited - Characters sep-	arate the fields
C Fixed width - Fields and rec	cords have a set length Rec. length: No. of fields:
< Back Next > C	ancel Save Create Now

6. Options in the **Options** frame change, based on the type of import file you are creating. Click **Include** and select the records you want to include when processing your import file.

**Note**: File names and the tools used to open import files is a matter of personal preference. The examples in this book represent one way of working with import files.

For this procedure, you want to change information entered in Batch 21. When the batch file was committed, a query of the records included in the batch was created. Click **Include**, then choose **Selected records**. The Open Query screen appears.

👫 Open Query	×
Find: Queries	
	🗎 🗋 Den
	Cancel
	b Edit
	🎦 Add New
	Op <u>t</u> ions
	Find Now
Find Queries that meet these <u>c</u> riteria:	
Query type: Gift 💽 Created On: 🔝	Ne <u>w</u> Search
Query format:	<u>P</u> revious Search
Query name:	Q
Description:	
Show merged queries only	Expand <u>R</u> esults

**Note**: For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

7. Because you are running a Gift import, "Gift" defaults in the **Query type** field. You can enter additional criteria information to limit your query search, or you can click **Find Now** to locate all gift queries saved in your database. All gift queries appear in the grid.

H Open Query Find: Queries				
Query Name	Query Desc	Туре	Format 🔺	20 <u>O</u> pen
Appeal = $\langle ask \rangle$ and Date Range =	Blackbaud s	Gift	Dynamic -	Cancel
Batch 21		Gift	Dynamic	
Batch Number = <ask></ask>	Blackbaud s	Gift	Dynamic :	
$Campaign = \langle ask \rangle$ and $Date Range$	Blackbaud s	Gift	Dynamic S	
Fund = <ask> and Date Range = <a< td=""><td>Blackbaud s</td><td>Gift</td><td>Dynamic :</td><td>tib J 🔊</td></a<></ask>	Blackbaud s	Gift	Dynamic :	tib J 🔊
Gift Amount = ASK		Gift	Dynamic S	<u>ک</u> <u>E</u> dit
Gift search for Supervisor	Used by the	Gift	Dynamic S	祫 A <u>d</u> d New
Gifts Acknowledged on = $\langle ask \rangle$	Blackbaud s	Gift	Dynamic S	Options
Gifts for 'This Month'	Blackbaud s	Gift	Dynamic S	opjons
Gifts for 'This Week'	Blackbaud s	Gift	Dynamic S	
•			•	AA Could be
Find Queries that meet these <u>c</u> riteria:				🚧 Eind Now
Query type: Gift	<b>•</b>	Created On:		Ne <u>w</u> Search
Query format:	•	Created by:	<b>•</b>	Previous Sea
Query name:	•			Q
Description:	-			
Show merged queries only	Exact match	i only		Expand <u>R</u> esu
14 records found.				

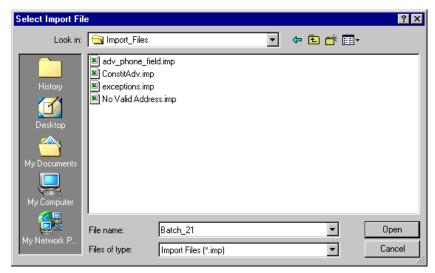
8. Select "Batch 21" and click **Open**. You return to the import parameter screen. The query name appears next to the **Include** button.

Import - Gift	×
File Edit View Favorites To	ols Help
🖬 🗙 📑 🖨 📬 🗛 i	a ?•
1: General 2: File Layout 3: Fi	elds ( <u>4</u> : Summary )
What do you want to do? C Import new records C Update existing records	Options Include] Selected records from 'Batch 21'
Create import file	<ul> <li>Include selected fields in the import file</li> </ul>
	O Include all fields in the import file
What file do you wish to cr	reate?
Import file:	
What ID Field do you want	to use?
Use the Import ID	
C Use the Constituent ID	
C Use the Social Security Nu	umber
What is the format of this i	mport file?
Delimited - Characters sep	arate the fields
C Fixed width - Fields and rec	cords have a set length Rec. length: No. of fields:
< <u>Back</u> <u>N</u> ext > C	ancel Save Create Now

9. In the **Options** frame, select **Include selected fields in the import file**. The program defaults to this option. If selected, on the Fields tab you must select and order the fields you want to include in your import file.

The **Include all fields in the import file** option includes in your import all fields related to the selected import type. If you select this option, all the fields are automatically loaded on the Fields tab by field names. You do not want this option, because you know the fields in the batch file that need to be changed and want only these fields in your import file.

10. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating. If you want to map to the specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.



11. In the **File name** field, enter a name for this import file — "Batch 21". In the **Files of type** field select a format for the import file. Because you intend to import the updated information back into **The Raiser's Edge**, the \*.imp format is your best choice.

12. To return to the Import - Gift screen, click **Open**.

Import - Gift	×
File Edit View Favorites To	iols Help
🔲 🗙 📑 🥔 🗞 🕼 (	<b>a</b> ? •
1: General 2: File Layout 3: F	ields 4: Summary
What do you want to do? Import new records Update existing records Create import file	Options Include Selected records from 'Batch 21' Include selected fields in the import file Include all fields in the import file
What file do you wish to c	reate?
Import file: C:\Ms\MS\Import_	Files\Batch_21.imp
What ID Field do you want	t to use?
<ul> <li>Use the Import ID</li> </ul>	
O Use the Constituent ID	
C Use the Social Security N	umber
What is the format of this i Delimited - Characters sep	
II ~ ·	cords have a set length Rec. length: No. of fields:
< Back Next > C	ancel Save Create Now

The file name and path appear in the **Import file** field.

- 13. The **What ID field do you want to use?** frame, is not relevant to creating import files. This option applies when you update records. You tell the program which one of the ID options is in the import file. The IDs are used to identify the constituent record being updated.
- 14. In the **What is the format of this import file?** frame, select **Delimited Characters separate the fields**. This option is the easiest and most reliable format. If selected, on the File Layout tab you must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: "Phone", "Address", "Name". Carriage returns and line feed breaks separate records.

The **Fixed width - Fields and records have a set length** option requires you to define the length of the records you intend to import. Fields may be truncated if you do not know the length of all fields you include in your import file. For example, if you set the **First Name** field length at 20, all names with 20 characters or less import into the program complete. Any name over 20 characters is truncated at the 21st character. Also, the next field to import starts immediately after the 20th character, so if you have a 20-character field, there is no space between it and the next field. We do not recommend using this option unless it is required to import data provided from an outside organization, such as a research company or mail list provider.

15. To move to the File Layout tab, click Next.

Import - Gift	×
File Edit View Favor	ites Tools Help
🖬 🔀 📑 🖨 🖻	黄 曾 ? *
<u>1</u> : General <u>2</u> : File Layo	ut 3: Fields 4: Summary
Field Separators and Te	xt Qualifiers
💿 Comma	Text qualifier: Quotation
C Tab C Semicolon C Space	Please indicate the text qualifiers. The information found between two text qualifiers will be imported as is. Any field separators found between two text qualifiers will not be treated as a field separator.
C Other	This allows you to distinguish between a field separator character and a character that is part of the data to be imported.
Import Field Names	
<ul> <li>Field names will be</li> </ul>	on the first line of the import
C Import file will not a	ontain field names
C Field names will be	in a separate file
< <u>B</u> ack	Cancel Create Now

16. In the **Field Separators and Text Qualifiers** frame, you have to tell the program how you want the import fields separated. The program defaults to the **Comma** field separator option. Although you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**, the comma is the most universally accepted.

The **Text qualifier** helps you distinguish between actual punctuation in a string of text and the field separator when you are reading the file. For example, if you select the comma as your field separator and quotation marks as the text qualifier, the program creates a text file containing the following data:

"100 Main Street, Apt. 23F", "San Diego", "CA"

You know all text contained between the text qualifier (quotation marks) is part of the same field. This helps you know that 100 Main Street, Apt. 23F is all part of the same field. If the quotation marks were not present the data appears as follows:

100 Main Street, Apt. 23F, San Diego, CA

You may not know if Apt. 23 F is part of the field that includes 100 Main Street or if it is its own field.

For this procedure, accept the defaults: Comma and "Quotation".

Note: For information about the other Import Field Names options, see the Import Guide.

17. In the **Import Field Names** frame, you have to tell the program if you have field names included with your import and, if so, what file they are in. Because you want to know the field names when you change your batch entries, select **Field names will be on the first line of the import file**. This tells the program the first line in the import file is the header, which contains the Import Name of the fields included in the file. The data starts in the second row, one record per row. So, in a Gift import each gift is given its own line; in a Constituent Phone import each phone number is give its own line; in a Constituent record is given its own line.

**Note:** If, on the General tab, you select **Include all fields in the import file**, all fields default in the **Raiser's Edge Field** box.

18. To move to the Fields tab, click Next.

mport - Gift	E.
File Edit View Favorites Tools Hel	P
🖬 🗙 📑 🖨 🗳 前 🖆 📍	•
1: General 2: File Layout 3: Fields 4:	
Select the fields you wish to include in the	
- Available Fields	Import Fields
Show: <all fields=""></all>	Raiser's Edge Field
[₽-Gift	Gift Import ID (GFImpID)
⊡-Installment Schedule	Fund (FundID)
	Date (GFDate)
	Type (GFType)
	Amount (GFTAmt)
Click here for detailed field information.	
Kind Select ->	<- Remove Update Fields Clear Fields
< <u>B</u> ack <u>N</u> ext> Cancel	Save Create Now

**Note**: If you are not sure which fields are required for you import, in the **Show** field, click the drop-down arrow. From the drop-down menu, you can select to view all <Required fields> or <Conditionally required fields>.

19. Because on the General tab, you selected **Include selected fields in the import file**, only fields always required to update existing or add new constituent addresses automatically appear in the **Raiser's Edge Field** box. You must manually select the other fields you want to include in your import file.

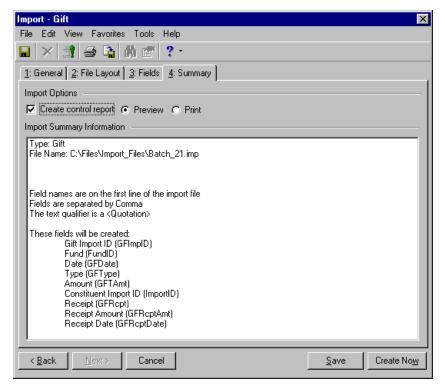
To manually map a field, from the **Available Fields** frame on the left, you must select the fields you want to include from the tree view on the left. Click **Select** to move the field into the **Raiser's Edge Field** box.

For example, in the **Available Fields** frame, select Constituent Import ID and click **Select**. The field moves into the **Raiser's Edge Field** box. Repeat the procedure to bring over Receipt, Receipt Amount, and Receipt Date.

port - Gift	
ile Edit View Favorites Tools	Help
IX 🛃 🖨 🔓 🔥 🖆	? -
: General ] <u>2</u> : File Layout <u>3</u> : Field:	A Summan
Select the fields you wish to include i	
Delect the helds you wish to include i	in the import life.
Available Fields	Import Fields
Show: <all fields=""></all>	Raiser's Edge Field
Amount Coins	Gift Import ID (GFImpID)
Anonymous	Fund (FundID)
Appeal Authorization Code	Date (GFDate)
-Bank Import ID	Type (GFType)
Benefit Notes	Amount (GFTAmt)
Campaign Cardholder Name	Constituent Import ID (ImportID)
Check Date	
Check Number	Receipt (GFRcpt)
Constituent Code Constituent ID	Receipt Amount (GFRcptAmt)
Constituent Import ID	Receipt Date (GFRcptDate)
Constituent SSN	
!Credit Card Evnires	
Click here for detailed field informati	
CICK THEE TO DECANED THE INFORMACI	
Find Select ->	Kernove Update Fields Clear Fields
< <u>B</u> ack <u>N</u> ext> Canc	el Save Create Nog

Note: You can also select the tab to move through the import parameter file.

20. To move to the Summary tab, click Next.



In the **Import Summary Information** frame, review the import parameters and other information selected for the import file.

21. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

22. Click **Create Now**. The program processes the import file. The Import Complete! screen appears when the process is done.



- 23. This screen displays the number of records processed and created. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not process. To see what caused the exception, look in the Exceptions section of the control report.
- 24. Click Close. The control report appears.

🖺 New Import Contra	pl/Summary Report	_ & ×
× 1€ € 10	of 1 🕨 🗏 🖷 🔗 🔗 👌 🚺 🔽 🚺 🦓 Totak0 100%	0 of 0
Preview		
	Import Control Report	
	Creating Import File - gifts	
	Creating import File - girts	
Results	1	
Records Proce		
Records Impo		
Records Upda	•	
Records Creat	0/5	
Exceptions:	0	
Output query of	of records imported:	
Output query (	of records updated:	
Exception file	2	
Criteria		
Type:	Gift	
File name:	C:\Ms\MS\Import Files\Batch 21.imp	
Function:	Create import file	
Options:	Selected records from 'Batch 21'	
	Include selected fields in the import file	
ID Used:	Import ID	
Header:	First line of import file	
Format:	Delimited	
	Fields are separated by comma	
	Text qualifier is quotation	
Field mapping	Text quanter is quotation	
Import field 1	name Raiser's Edge field	
GFImpID	Gift Import ID	
FundID	Fund	
arp .		
•		

The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.

- 25. To print the report, click **Print** on the toolbar at the top of the page.
- 26. To export the report to use in another application, click **Export** on the toolbar at the top of the page.
- 27. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.
- 28. To save the import parameter file, click Save. The Save screen appears.

Save Impo	rt As	×
<u>N</u> ame:	Batch 21	Save
Description:	10/10/2003	Cancel
	<ul> <li>Other users may <u>r</u>un this import</li> <li>Other users may <u>m</u>odify this import</li> </ul>	

- 29. Enter a Name and Description for your import. You can also allow other users access to the import.
- 30. To return to the import parameter screen, click Save.
- 31. To exit the import parameter screen, from the menu bar, select File, Close.
- 32. You are now ready to make changes to your import file. For information about working with an import file in *Excel*, see "Working with a Raiser's Edge Import File in Excel" on page 85.

#### Importing the updated data back into The Raiser's Edge

After you make your changes to the import file, you can import the updated information back into **The Raiser's Edge** using the same import file.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.





2. Click Import. The Administration - Import screen appears.

All import types appear in a tree view on the left side of the screen. Scroll down until you find Gift.

3. Select **Gift** under **Gift** from the tree view and click **New** on the action bar. The Import - Gift screen appears, displaying the General tab.

Import - Gift		х
File Edit View Favorites To	pols Help	
🔒 🗙 📑 🥌 🟠 🔥	· ? ·	
1: General 2: File Layout 3: F	ields 🛛 <u>4</u> : Summary 🔪	
What do you want to do? © Import new records © Update existing records © Create import file	Options Validate data only Create new table entries Import records not found as new records Automatically add installments for new pledges	
What file do you wish to in	mport?	ļ.
Import file:		
How do you want the syst	em to identify existing constituents?	
Use the Import ID		
C Use the Constituent ID		
O Use the Social Security N	umber	
What is the format of this © Delimited - Characters sep © Fixed width - Fields and re	•	
< Back Next > C	Cancel Import Nov	¥

4. Because you are importing updates to existing records, in the **What do you want to do?** frame, select **Update existing records**.

Import - Gift	×
File Edit View Favorites To	ools Help
🔒 🔀 💐 🖨 🗳 🔥	🗐 ? -
1: General 2: File Layout 3: F	ields 4: Summary
What do you want to do?	C Options
<ul> <li>Import new records</li> <li>Update existing records</li> </ul>	□ Validate data only
·····	Create new table entries
C Create import file	Import records not found as new records
	Automatically add installments for new pledges
What file do you wish to in	nport?
Import file:	
How do you want the syst	em to identify existing constituents?
Use the Import ID	
O Use the Constituent ID	
O Use the Social Security N	umber
What is the format of this	import file?
Delimited - Characters sep	parate the fields
C Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > C	Cancel Save Update Now

- 5. In the Options frame, because you want to make sure your import file has all of the required fields, mark the Validate data only checkbox. The Import Now button at the bottom of the screen changes to read Validate Now. After you set all of the import parameter tabs, you can click Validate Now, and the program identifies any required fields you may be missing in your import file before you import the new information into your database.
- 6. In the **Options** frame, for this example, do not mark **Create new table entries**. If marked, the program automatically creates new table entries for import fields with table entries not already entered in *The Raiser's Edge*. When using this option, you must take care to make sure this does not result in misspellings and incorrect formatting. For example, title entries may appear in several different forms: MR., Mr, Mr.
- 7. Also in the **Options** frame, because your import file includes all fields required to import records as "new" as well as those required for the update, mark **Import records not found as new records**. If marked, the program attempts to create new records for any record in your import file that does not exist in *The Raiser's Edge*. For information about fields required for new imports, see the Import Table chapter of the *Import Guide*.

8. In the **What file do you wish to import?** frame, enter the name and path of the import file you want to import. Click the ellipsis to access the Select Import File screen.

Select Import Fil	e			? ×
Look in:	G Import_Files	•	🗢 🗈 📩 🎟	
History Desktop	adv_phone_fie Batch_21.imp ConstitAdv.imp exceptions.imp No Valid Addre			
My Documents				
My Computer				
	File name:	Batch_21.imp	•	Open
My Network P	Files of type:	Import Files (*.imp)	•	Cancel

- 9. Map to and select the import file.
- 10. Click **Open**. You return to the import parameter screen.

Import - Gift	×
File Edit View Favorites To	ols Help
🔲 🗙 💐 🖨 🔓 🛝 i	a ?·
1: General 2: File Layout 3: F	ields 🛛 🛓 Summary 🔪
What do you want to do? C Import new records C Update existing records C Create import file	Options Validate data only Create new table entries Minimum Information for the provided as
What file do you wish to in	
Import file: C:\Files\Import_File	es\Batch_21.imp
How do you want the syste	em to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
O Use the Social Security N	umber
What is the format of this i	import file?
Delimited - Characters sep	arate the fields
C Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:
< Back Next > C	ancel Save Validate Now

The import file name and path appear in the **Import file** field.

- 11. In the **How do you want the system to identify existing constituents?** frame, select **Use the Import ID**. You included this field when you created your import file.
- 12. In the **What is the format of this import file?** frame, select **Delimited Characters separate the fields**. This is the format you selected when you created the import file.

13. To move to the File Layout tab, click Next.

mport - Gift				×
File Edit View Fav	vorites Tools Helj	)		
🖬 🗙 💐 🔿 🔖 💣 ?				
1: General 2: File Layout 3: Fields 4: Summary				
Field Separators and	Fext Qualifiers			
💿 Comma	Text qualifier: Q	uotation 💌		
C Tab C Semicolon C Space	Please indicate the text qualifiers. The information found between two text qualifiers will be imported as is. Any field separators found between two text qualifiers will not be treated as a field separator.			
C Other	This allows you to distinguish between a field separator character and a character			
Import Field Names				
Field names are on the first line of the import file				
C Import file does r	C) Import file does not contain field names			
C Field names are in a separate file				
Sample Import Format				
GFImpID	FundID	GFDate	GFType	GFTAmt 🔺
00001-057-0000218	Acquisition Fund	02/28/2000	Cash	50
00001-057-00000	Building Fund	11/11/2004	Cash	1000
	na dale e mare a	00/14/2002	~L	
< <u>B</u> ack <u>N</u> ext	> Cancel			Save Validate No <u>w</u>

The information on this tab should match the information you selected when you created the import file in "Creating a gift import in The Raiser's Edge" on page 52.

- 14. In the Field Separators and Text Qualifiers frame, select Comma.
- 15. In the Text qualifier field select "Quotation".
- 16. In the Import Field Names frame, select Field names are on the first line of the import file.

17. To move to the Fields tab, click **Next**.

🖬 🗙 🗊 🖨 🔓 🕷 🗗 📍	•		
1: General 2: File Layout 3: Fields 4:	Summary		
Indicate where each 'Field to Import' shoul Fields'	d go by choosing the Rai	ser's Edge Field from the list o	of 'Available
Available Fields			
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field	Exten
	GFImpID	Gift Import ID (GFImpID)	
i∄-Gift i∄-Installment Schedule	FundID	Fund (FundID)	
ternstallment Schedule ⊡Notepad	GFDate	Date (GFDate)	
i ⊕ Soft Credits	GFType	Type (GFType)	
ErSolicitor ErSolit Gifts	GFTAmt	Amount (GFTAmt)	
±Tribute	GFRcpt	Receipt (GFRcpt)	
	GFRcptAmt	Receipt Amount (GFRc	
	GFRcptDate	Receipt Date (GFRcpt	
Click here for detailed field information.	<- Remove	Update Fields C	lear Fields

**Note**: If you are not sure which fields are required for you import, in the **Show** field, click the drop-down arrow. From the drop-down menu, you can select to view all <Required fields> or <Conditionally required fields>.

18. The **Raiser's Edge Field** column automaps to the **Field to Import**. If the program fails to automap the fields, you must manually map the fields.

To manually map the fields, from the **Available Fields** frame on the left, select the fields you want to include in the **Raiser's Edge Field** column.

For example, in the **Field to Import** column on the right, highlight the first field you want to manually map: "GFImpID". From the tree view on the left, select **Gift Import ID** and click **Select** to move the field into the **Raiser's Edge Field** column in the "GFImpID" row. Repeat this procedure for each unmapped field in the **Field to Import** column. For more information about the **Raiser's Edge** fields and how they correspond to the **Field to Import**, see the Import Tables chapter in the *Import Guide*.

19. To move to the Summary tab, click Next.

Import - Gift 🛛 🗙
File Edit View Favorites Tools Help
1: General     2: File Layout     3: Fields     4: Summary
Import Options
Create exception file of records not updated/imported C:\Ms\MS\Import_Files\exceptions.imp
Create an output query of the records imported
Create an output query of the records updated
Create control report  Preview  Print
Import Summary Information
Type: Gift File Name: C:\Ms\MS\Import_Files\Batch_21.imp
Validate data only
Field names are on the first line of the import file Fields are separated by Comma The text qualifier is a <quotation></quotation>
These fields will be validated: Gift Import ID (GFImpID) Fund (FundID) Date (GFDate) Type (GFType) Amount (GFTAmt)
Kext>         Cancel         Save         Validate Now

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

20. To create a file of all records the program fails to update, mark **Create exception file of records not updated/imported**. To browse to the folder in which you want the file saved, click the ellipsis. The Save As screen appears.

Save As		? ×
Look in:	🔁 Import_Files 💽 🔶 🖆 🏢	•
History	i exceptions.imp I No Valid Address.imp	
Desktop My Documents		
My Computer		
	File name: exceptions.imp	Open
My Network P	Files of type: Import Files (*.imp)	Cancel

- 21. Enter a File name. For this procedure, enter "exception.imp".
- 22. In the Files of type field, select the type of file you want saved. We recommend selecting \*.imp or \*.csv.
- 23. Click **Open**. You return to the import parameter screen.

- 24. Mark the **Create an output query of the records imported** checkbox to create a query of all new records created during the update. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created. This checkbox is activated only if you marked **Import records not found as new records** on the General tab.
- 25. Mark the **Create an output query of the records updated** checkbox to create a query of all records updated. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.
- 26. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.
- Click Validate Now. The program validates the import file. The Import Complete screen appears. If no
  Exceptions are recorded, you are ready to import the data. If any Exceptions are recorded, click Close. The
  Control Report appears, listing any exceptions.



28. In this example, 17 exceptions were found. Click **Close** to open the control report. Scroll down to the Exceptions section to learn why these 17 records will not update.

view			
GFIype	1 ype		
GFTAmt	Amou	nt	
tions			
Record No.	Field	Field Value	Reason
84	GiftSplitAppeal	Annual Exhibit	Validation error: This appeal is not among the appeals designated for the specified campaign.
170	GiftSplitAppeal	Annual Exhibit	V alidation error: This appeal is not among the appeals designated for the specified campaign.
172	GiftSplitAppeal	Annual Exhibit	V alidation error: This appeal is not among the appeals designated for the specified campaign.
173	GiftSplitAppeal	Annual Exhibit	V alidation error: This appeal is not among the appeals designated for the specified campaign.
184	GiftSplitAppeal	Year End Appeal	Validation error: This appeal is not among the appeals designated for the specified campaign.
467	GFReptAmt	1 <i>5</i> 00000	Validation error: A business rule prohibits 'receipt amount' from exceeding 'gift amount'.
			Please change the amount of one of these fields.
539	GiftSplitAppeal	Annual Newsletter	V alidation error: This appeal is not among the appeals designated for the specified campaign.
627	Fund	1999 Annual Fund; Smith-Brown	Invalid field value: Gift is split - use the GiftSplits
		Scholarship Fund	collection to modify this field (Fund).
635	Fund	1999 Annual Fund; Smith-Brown	Invalid field value: Gift is split - use the GiftSplits
		Scholarship Fund	collection to modify this field (Fund).
673	GiftSplitFund	Playground S ite	V alidation error: This fund is not among the funds designated for the specified campaign.
758	GiftSplitAppeal	Annual Newsletter	V alidation error: This appeal is not among the appeals designated for the specified campaign.

- 29. You can then go into the import file and fix each exception or run the import with the exceptions and use the exceptions file you choose to create when you completed the Summary tab to fix the records at a later date. You can then use the exceptions file to import the 17 corrected records.
- 30. After you validate your import file and are ready to update your records, return to the General tab. Unmark the **Validate data only** checkbox.

Import - Gift	X						
File Edit View Favorites To	ols Help						
🖬 🗙 🚉 🖨 📬 🗰 🖀 ? ·							
1: General 2: File Layout 3: F	ields [ <u>4</u> : Summary ]						
What do you want to do?							
C Import new records	Options						
Opdate existing records	Create new table entries						
C Create import file	Import records not found as new records						
	Automatically add installments for new pledges						
What file do you wish to in	nport?						
Import file: C:\Files\Import_Fil	es\Batch_21.imp						
How do you want the syste	em to identify existing constituents?						
Use the Import ID							
C Use the Constituent ID							
O Use the Social Security N	umber						
What is the format of this	import file?						
Delimited - Characters sep	arate the fields						
C Fixed width - Fields and re	cords have a set length Rec. length: No. of fields:						
< Back Next > C	ancel Save Update Now						

31. Click **Update Now**. Because you marked the **Create an output query of the records imported** checkbox on the Summary tab, the Save Static Query screen appears.

Save Static Query	×
Query name: Batch 21 Update Records	Save
Description: 10/10/2003	Cancel
Query format: Static Query Type: Gift	
<ul> <li>✓ Other users may execute this query</li> <li>✓ Other users may modify this query</li> </ul>	

32. Enter a Query name and Description. You can also allow others to use and modify your query.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

33. Click **Save**. Because you marked the **Create an output query of the records updated** checkbox on the Summary tab, a second Save Static Query screen appears. Complete the fields on the screen.

34. Click **Save**. The program processes the import. When the process is complete, the Import Complete! screen appears.



This screen displays the number of records processed, added, and updated. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not update. Because you did not correct the exceptions found during the validation process, the same 17 exceptions appear on this screen. All 17 records are saved to the "exceptions" file you choose to create when you completed the Summary tab. To see what caused the exception, look in the Exceptions section of the control report.

35. Click **Close**. The Control Report appears.

😫 New I	mport Control/S	ummary	Repo	ort										_ 8 ×
× N	1 of 1+	•			8 1	۶ 👌	100%	•		緧	Total:17	100%	17 of 17	
Preview	1													
							Imno	rt Ci	ontrol	Renor	1			<b>^</b>
											•			
								Upda	ting - gi	τs				
Resu														
	Records Processe	. 075												
	Records Imported													
	Records Updated													
	Records Created:	0												
	Exceptions:	17												
	Output query of r	ecords in	nporte	d:	Batcl	h 21 U	Jpdate R	ecords						
	Output query of r	ecords up	pdated		Quer	yofU	pdated :	Record	s					
	Exception file:				C:W	[s\MS	Import	Filesle	ceptions.	mp				
Crite	ria													
	Type:	Gift												
	File name:	C:Ws	\MS\I	m po:	rt File:	s\Batc	h 21.im	a						
	Function:	Updat	e exis	ing :	records	5								
	Options:	Impor	t reco:	rds n	ot four	nd as r	new reco	rds						
	ID Used:	Impor												
	Header:	First li		im po	ort file									
	Format:	Delim		1										
		Fields	are se	para	ted by	comn	na							
		Textq	ualifi	eris	quotati	ion								
Field	mapping													
	Import field nan	1e	Ra	iser'	s Edge	field								
	GFImpID		Gi	ft Im	port II	)								
	FundID		Fu	nd										
	GFDate		Da	te										-
•	0.00		-											

The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.

- 36. To print the report, click **Print** on the toolbar at the top of the page.
- 37. To export the report to another application, click **Export** on the toolbar at the top of the page.
- 38. To close the report, click the "X" in the upper right corner. You return to the import parameter screen.

39. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.

Save Import As						
<u>N</u> ame:	Batch 21	Save				
Description:	10/10/2003	Cancel				
	<ul> <li>Other users may <u>r</u>un this import</li> <li>Other users may <u>m</u>odify this import</li> </ul>					

- 40. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import file.
- 41. Click Save. You return to the import parameter screen.
- 42. To exit the import parameter screen, from the menu bar select File, Close.

## Creating Gift Import Files in Excel and Importing the File into The Raiser's Edge

The following procedures take you step-by-step through the process of creating a gift import file in *Excel* and importing the file into *The Raiser's Edge*. Such a file may result from an outside event, during which volunteers do not have access to *The Raiser's Edge*. Creating import files in outside applications such as *Excel* may prove more difficult than creating a file using *The Raiser's Edge*. With any outside application, you must look up all the import fields you want to include in the process, find all required fields, and manually enter this information in a spreadsheet or word document. Once you complete the import file, you can import the gift information into *The Raiser's Edge*.

The following example shows you how to create an import file using *Excel*; lists all required import fields; and shows you how to import the new information from the spreadsheet into *The Raiser's Edge*.

#### • Creating a gift import file using Excel

The following procedure shows you how to create an import file with a header and include all fields required to import gifts that include installments.

1. Open an Excel spreadsheet.

		cel - Book										_ 🗗 ×
										_ 8 ×		
	😂 🖬 🔒	) 🖨 🖪	😍 🎖 🕲	n 🛍 🗠	🔔 Σ	f* 🛃 🛍	. 🕐 🙄 A	vrial	- 1	0 🔹 🖪	I <u>U</u> 🕻	°.00 ∾
	A1	•	=									
	Α	B	C	D	E	F	G	Н	1	J	K	L 🗖
1												
2		T										
3												
4												
5												
6												
8												
9												
10												
11												
12												
12 13												
14 15 16												
15												
16												
17												
18												
19												
20 21 22 23												
21												
22												
23												
24												
20	Inclusion		2 / Sheet3 /	,							-	-
		et1 / Sheet	2 / Sheet3 /	/				•				
Rea	dy											

In the first row, you must create your field header, identifying the fields you want to include in your import file. Depending on the type of import you want to run, certain fields are required. All required fields are listed in the Import Tables chapter of the *Import Guide*.

For this procedure, you want to create a gift import with installment information, so you want all fields required in the Gift Fields and Installment Schedule Fields sections of the Import Tables chapter of the Import Guide.

In the table below, the **Field Name** column displays all the **Raiser's Edge** fields you must include in your import file. The **Import Name** column displays how the corresponding field name is represented in the import file, and the **Requirements** column explains why and when certain fields are required. This information is taken from the Import Tables chapter of the *Import Guide*.

Field Name	Import Name	Requirements
Amount	GFTAmt	Required to add new records
Constituent Import ID	ImportID	You must include <b>Constituent ID</b> , <b>Constituent Import ID</b> , or <b>Constituent SSN</b> , depending on how you select to identify existing records on the General tab of the import parameter file.
Date	GFDate	Required to add new records
Fund	FundID	Required to add new records
Туре	GFType	Required to add new records

Field Name	Import Name	Requirements
Day of Week	GFInsDayName	Required if <b>Frequency</b> = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Ordinal day is not blank
Frequency	GFInsFreq	Required to add new
Frequency Option	GFInsFreqOpt	Required if <b>Frequency</b> = Semi-Annually, Quarterly, Bimonthly, or Monthly
Month Name	GFInsMonthNam e	Required to add new records
Frequency Number	GFInsFreqNum	Required if <b>Frequency</b> = Monthly, Semi-Monthly, or Weekly
Number of Installments	GFInsNumPay	Required to add new if <b>Frequency</b> is not Single Installment
Numeric Day	GFInsNumDay	Required if <b>Frequency</b> = Annually; Required if <b>Frequency</b> = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Ordinal day and Day of week are blank; Required if <b>Frequency</b> is Semi-Monthly <b>and</b> Ordinal day is Specific Day
Numeric Day 2	GFInsNumDay2	Required if <b>Frequency</b> = Semi-Monthly and Ordinal day 2 is Specific Day
Ordinal Day	GFInsOrdDay	Required if <b>Frequency</b> = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Day of week is not blank; Required if <b>Frequency</b> = Semi-Monthly (day 1)
Ordinal Day 2	GFInsOrdDay2	Required if <b>Frequency</b> = Semi-Monthly
Start Date	GFInsStartDate	Required to add new

**Warning**: When working in *Excel*, the last column must contain data for each record. Therefore, we recommend placing a required field, such as Import ID, in the last column.

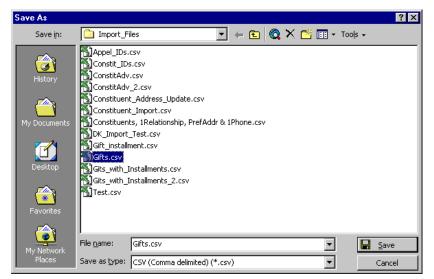
Based on the information included in the previous table, the header row in *Excel* should look similar to the following two screens.

<b>N</b>	Microsoft Excel - Book1									
•	월 File Edit Yiew Insert Format Iools Data Window Help Acrobat _ 문자									
D	) 🚅 🖬 🚑 🔯 🐧 🚏 🐰 🖻 🏨 🗠 τ 🍓 Σ ≉ 🛃 🛍 🕄 🐥 Arial 🛛 τ ΙΟ τ ΒΗ Ζ Ψ 號 4% 🤾									
	A26 🔽 =									
	A	В	С	D	E	F	G	Н		<u> </u>
1	GFTAmt	GFDate	FundID	GFType	GFInsDayNam	e GFInsFreq	GFFrequOption	GFInsMonthNan	ne GFInsF	reqNum 🛑
2										
3										
4										
5										
3	licrosoft Ex	cel - Book	1							_ 8 ×
	<u>Eile E</u> dit <u>V</u> i	ew <u>I</u> nsert	Format To	ols <u>D</u> ata <u>V</u>	<u>V</u> indow <u>H</u> elp Acro	o <u>b</u> at				_ 8 ×
D	🖻 🖬 🔒	) 🖨 🖪	🌮 🐰 🗉	b 🛍 🗤	- 🍓 Σ f <sub>st</sub>	<u></u> ≱↓ ( <u>()</u> , (2) ×	Arial	• 10 • <b>B</b>	IU.	.0 .00 » 0 •.0 •
_	A26	-	=			1	1			
	J		K		L	M	N	0	Р	Q 🔒
1	GFInsNum	nPay G	FinsNumD	ay GFI	nsNumDay2	GFInsOrdDay	GFInsOrdDay2	GFInsStartDate	ImportID	
2										
3										
4										
5										
-										

2. You can start adding data in row two.

M I	Microsoft Excel - Gift_Import_Installments.csv										
	월 Eile Edit View Insert Format Iools Data Window Help Acrobat/라고										
	🗅 😂 🖬 🚑 🤮 🔃 🚏 🐰 🗈 💼 👘 🗸 🍓 Σ ≉ 🛃 🏙 🕄 Ϋ Arial 🔹 10 🔹 🖪 Ζ 🖳 % 🖓										
	A27	-	=								
	Α	В	С	D	E	F	G	Н		J	К
1	GFTAmt	GFDate	FundID	GFType	GFInsDa	GFInsFreq	GFInsMor	GFInsFree	GFInsNun	GFInsNu	r GFInsNur
2	500	#######################################	Botanical Garc	Pledge		Single Installment					
3	750	#######################################	Botanical Garc	Pledge		Single Installment					
4	500	#######################################	Botanical Garc	Pledge		Single Installment					
5	350	#######################################	Smith-Brown S	Pledge		Single Installment					
6	250	#######################################	Botanical Gard	Cash							
7	100	#######################################	Acquisition Fu	Cash							
8	25	#######################################	Building Fund	Cash							
9	250	##########	Botanical Gard	Cash							
10	750	#######################################	Playground Sit	Cash							

- 3. You must include a hard break (ENTER key) at the end of each row of data.
- 4. After you add all the information you want to include in your import file, select **File**, **Save As** from the menu bar. The Save As screen appears.



5. Enter the name of your file in the File name field.

**Note**: When you save a \*.csv file in *Excel*, you may receive a message warning the file "may contain features that are not compatible with CSV (comma delimited). Do you want to keep the workbook in this format." Click **Yes**.

- In the Save as type field, select a format for the file. The Raiser's Edge can import files saved with a \*.csv, \*.txt, and \*.prn extensions. However, we recommend the \*.csv (comma separated value), as the most user friendly with The Raiser's Edge.
- 7. Click Save. You are now ready to import the *Excel* import file into *The Raiser's Edge*.

#### Importing an Excel gift import file into The Raiser's Edge

After you create and save your import file in *Excel* (or some other spreadsheet or word processing program), you can import the information into *The Raiser's Edge*.

1. On the Raiser's Edge bar, click Admin. The Administration page appears.





2. Click Import. The Administration - Import screen appears.

All import types appear in a tree view on the left side of the screen. Scroll down until you find Gift.

- 3. Select Gift under the Gift category on the tree view.
- 4. On the action bar, click **New**. The Import Gift screen appears, displaying the General tab.

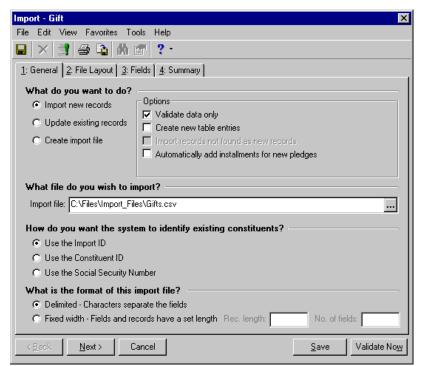
Import - Gift		×
File Edit View Favorites To	ools Help	
🔒 🔀 📑 🖨 🗳 🔥	🕋 🕐 -	
1: General 2: File Layout 3: F	fields 🛛 <u>4</u> : Summary 🗋	
What do you want to do?		_
Import new records	Options	
C Update existing records	Validate data only	
	Create new table entries	
C Create import file	Import records not found as new records	
	Automatically add installments for new pledges	
What file do you wish to in	mport?	
Import file:		.]
How do you want the syst	em to identify existing constituents?	_
Use the Import ID		
C Use the Constituent ID		
O Use the Social Security N	lumber	
What is the format of this		_
Delimited - Characters sep	parate the fields	
C Fixed width - Fields and re	ecords have a set length Rec. length: No. of fields:	
< <u>B</u> ack <u>N</u> ext > C	Cancel Save Import No	<u>w</u>

5. Because you are importing new records, in the What do you want to do? frame, select Import new records.

- 6. In the **Options** frame, because you want to make sure your import file has all of the required fields, mark the **Validate data only** checkbox. The **Import Now** button at the bottom of the screen changes to read **Validate Now**. After you set all of the import parameter tabs, you can click **Validate Now**, and the program identifies any required fields you may be missing in your import file before you import the new information into your database.
- 7. In the **Options** frame, for this example, do not mark **Create new table entries**. If marked, the program automatically creates new table entries for import fields with table entries not already entered in *The Raiser's Edge*. Be careful when using this option. It may result in misspellings and incorrect formatting. For example, title entries may appear in several different forms: MR., Mr, Mr.
- 8. In the **What file do you wish to import?** frame, enter the name and path of the import file you want to import. Click the ellipsis to access the Select Import File screen.

Select Import Fi	le	? ×
Look in:	🔄 Import_Files	- 🔄 🖆 🎫
History Desktop My Documents My Computer	adv_phone_field.imp     Appe[_IDs.csv     Batch_21.imp     ConstID_file     constit_attributes.txt     Constit_IDs.csv     ConstitAdv.csv     ConstitAdv.csv	Constituent_Address_Update.csv Constituent_Import.csv Constituents, 1Relationship, Prefx DK_Import_Test.csv exceptions.imp Gift Gift_installment.csv Gift_installment.csv Gifts_csv Gits_with_Installments.csv Gits_with_Installments.imp
My Network P	File name: Files of type: All Files (*.*)	▼ Open Cancel

- 9. Map to and select the import file.
- 10. Click Open. You return to the import parameter screen.



The import file name and path appear in the **Import file** field.

- 11. In the **How do you want the system to identify existing constituents?** frame, select **Use the Import ID**. This is the field you included in your import file that allows the program to identify the constituent records to which the gifts are to be added.
- 12. In the What is the format of this import file?, because you know the import file is saved as a \*.csv, select Delimited Characters separate the fields.

Note: You can also select the tab to move through the import parameter file.

13. To move to the File Layout tab, click Next.

Import - Gift				×
File Edit View Fav	vorites Tools Help	I.		
🖬   🗙   📑   😂	🍋 🗰 💣 📍	•		
1: General 2: File La	yout <u>3</u> : Fields <u>4</u> : 9	Summary		
Field Separators and	Fext Qualifiers			
Comma	Text qualifier: Qu	iotation 🔻	_	
⊂ Tab ⊂ Semicolon ⊂ Space		is is. Any field sep		between two text qualifiers two text qualifiers will not
C Other	This allows you to that is part of the			naracter and a character
Import Field Names -				,
<ul> <li>Field names are</li> </ul>	on the first line of the	import file		
C Import file does r	not contain field name	es		
C Field names are	in a separate file			
Sample Import Format		,		
FundID	GFDate	GFType	GFTAmt	ImportID 📩
2002 Membership	08/02/2002	Cash	750	00001-079-0000
Acquisition Fund	06/13/2003	Cash	300	00001-079-0000
	10/02/2002	∕~ L	1000	
< <u>B</u> ack	> Cancel			Save Validate No <u>w</u>

The information on this tab must match the the import file formatting.

- 14. Because you selected the \*.csv (commas separate values) format when you saved your import file in *Excel*, in the **Field Separators and Text Qualifiers** frame, select **Comma**.
- 15. In the Text qualifier field select "Quotation".
- 16. In the **Import Field Names** frame, select **Field names are on the first line of the import file**. The program then knows the first row of the import file contains field header information, and the actual data starts on the second row of the import file.

In the **Sample Import Format** frame, the program displays the field names and data included in your import file.

**Note**: You can also select the tab to move through the import parameter file.

17. To move to the Fields tab, click **Next**.

Import - Gift File Edit View Favorites Tools Help 🔲 🗙 📑 🖨 🏠 🌆 🖅 ?			
1: General 2: File Layout 3: Fields 4: Indicate where each 'Field to Import' should Fields' Available Fields		er's Edge Field from the list o	f 'Available
Show: <all fields=""></all>	Field to Import	Raiser's Edge Field	Exten.
	FundID	Fund (FundID)	
i≣-Gift Frinstallment Schedule	GFDate	Date (GFDate)	
terinstallment schedule ∎-Notepad	GFType	Type (GFType)	
t∎-Soft Credits	GFTAmt	Amount (GFTAmt)	
	ImportID	Constituent Import ID	
±Tribute	GFInsDayName	Day of Week (GFInsD	
	GFInsFreq	Frequency (GFInsFreq)	
	GFInsFreqOpt	Frequency Option (GF	
	GFInsMonthName	Month Name (GFInsMo	
	GFInsFreqNum	Frequency Number (G	
	GFInsNumPay	Number of Installment	
<u>Click here</u> for detailed field information.	<b>T</b>	Numerie Deux (CET-shire	
M Find Select ->	<-Remove	Update Fields Cl	ear Fields
< <u>B</u> ack		<u>S</u> ave	√alidate No <u>v</u>

**Note**: If you are not sure which fields are required for you import, in the **Show** field, click the drop-down arrow. From the drop-down menu, you can select to view all <Required fields> or <Conditionally required fields>.

- 18. The **Raiser's Edge Field** column automaps to the **Field to Import** column. If the program fails to automap, you must manually map to the fields.
- 19. To manually map the fields, select the fields you want to include from the **Available Fields** frame on the left.

For example, to map "GFTAmt" in the **Field to Import** column to a **Raiser's Edge** field, highlight "GFTAmt" in **Field to Import** column. From the tree view on the left, highlight "Amount" and click **Select** to move the field into the **Raiser's Edge Field** column in the "GFTAmt" row. Repeat this procedure for each field you must manually map. For more information about the **Raiser's Edge** fields and how they correspond to the **Field to Import**, see the Import Tables chapter in the *Import Guide*.

Note: You can also select the tab to move through the import parameter file.

20. To move to the Summary tab, click Next.

Import - Gift 🛛 🗙
File Edit View Favorites Tools Help
1: General 2: File Layout 3: Fields 4: Summary
Import Options
Create exception file of records not updated/imported C:\Files\Import_Files\exceptions.imp
Create an output query of the records imported
Create an output query of the records updated
Create control report  Preview  Print
Import Summary Information
Type: Gift File Name: C:\Files\Import_Files\Gifts.csv
Validate data only
Field names are on the first line of the import file Fields are separated by Comma The text qualifier is a <quotation></quotation>
These fields will be validated: Fund (FundID) Date (GFDate) Type (GFType) Amount (GFTAmt) Constituent ImportID (ImportID)
<back next=""> Cancel Save Validate Now</back>

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

21. To create a file of all records the program fails to import, mark **Create exception file of records not** updated/imported. To browse to the folder in which you want the file saved, click the ellipsis. The Save As screen appears.

Save As		? ×
Look in:	🔁 Import_Files 💽 🗲 🖻	« 🏢 🗸
History Desktop My Documents My Computer	i exceptions.imp ■ No Valid Address.imp	
	File name: exceptions.imp	Open
My Network P	Files of type: Import Files (*.imp)	Cancel

- 22. Enter a File name. For example, in this procedure enter "exception".
- 23. In the **Files of type** field, select the type of file you want saved. We recommend saving the file as a \*.imp or \*.csv. These formats are the most user-friendly with *The Raiser's Edge*.
- 24. Click **Open**. You return to the import parameter screen.

- 25. Mark the **Create an output query of the records imported** checkbox to create a query of all records updated. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.
- 26. Mark the **Create control report** checkbox to print a report listing a summary of the results and the field mappings. The report also shows other import-specific information, reasons for any exceptions, and the path where you saved the import. Select **Preview** to view the report on your screen before printing.
- 27. Click **Validate Now**. The program validates the import file. The Import Complete screen appears. If no Exceptions are recorded, you are ready to import the data.

Import - The Raiser's Edge for Wind	dows	×
0/28 C / 00	Import Com	plete!
	Records Processed:	731
	Records Added:	0
	Records Updated:	0
	Exceptions:	0
	Total Time:	00:01:46
	Records / sec:	6.90
		Close

- 28. If any Exceptions are recorded, click **Close**. The Control Report appears, listing any exceptions. You can then go into the import file and fix each exception or run the import with the exceptions and use the exceptions file you choose to create when you completed the Summary tab to fix the records at a later date. You can then use the exceptions file to import the corrected records.
- 29. After you validate your import file and are ready to import your records, return to the General tab. Unmark the **Validate data only** checkbox.

Import - Gift	×
File Edit View Favorites Too	ols Help
🖬 🗙 📑 🖨 📬 🗛 🛛	an 🥐 -
1: General 2: File Layout 3: Fi	elds 🛛 4: Summary
What do you want to do?	
Import new records	Options
O Update existing records	Validate data only
C Create import file	Create new table entries
C Create import nie	Import records not found as new records     Automatically add installments for new pledges
	Automatically add installments for new piedges
What file do you wish to im	aport?
Import file: C:\Files\Import_File	es\Gifts.csv
How do you want the syste	m to identify existing constituents?
Use the Import ID	
C Use the Constituent ID	
C Use the Social Security Nu	umber
What is the format of this i	mport file?
Delimited - Characters separate	arate the fields
C Fixed width - Fields and red	cords have a set length Rec. length: No. of fields:
< <u>B</u> ack <u>N</u> ext > Ca	ancel Save Import Now

30. Click **Import Now**. Because you marked the **Create an output query of the records imported** checkbox on the Summary tab, the Save Static Query screen appears.

Save Static Query		×
Query <u>n</u> ame: New Gift		Save
Description: 10/10/2004	<u> </u>	Cancel
	<b>v</b>	
Query <u>f</u> ormat: Static	Query Type: Gift	
Other users may execute this query	Created From: Import -	
Other users may modify this query		

31. Enter a **Query name** and **Description**. You can also allow others to use and modify your query.

**Note**: If you do not mark the **Create control report** checkbox on the import parameter file, a **Preview Report** button appears on the Import Complete! screen, allowing you to access the report.

32. Click **Save**. The program processes the import. When the process is complete, the Import Complete! screen appears.

Import - The Raiser's Edge for Wine	dows	×	×
0.28 8 4 00 100 100 10	Import Com	plete!	
	Records Processed:	731	
	Records Added:	731	
	Records Updated:	0	
	Exceptions:	0	
	Total Time:	00:02:39	
	Records / sec:	4.60	
data assmire		Close	

This screen displays the number of records processed, added, and updated. It also shows the number of exceptions, if any, and how long the process took. Exceptions are records the program could not update. To see what caused the exception, look in the Exceptions section of the control report.

33. Click Close. The Control Report appears.

🕒 Ne	w Import Control/	Summary Rep	ort							_ 🗗 ×
×	(		=   🖨 🗲	🗲 🛃 🚺 💌		<i>#</i> 4	Total:0	100%	0 of 0	
Previe	ew									
				Imm art C	natural Des					
				Import C		0011				
				Impo	ting - gifts					
Resu	<b>lits</b> Records Processe	1: 731								
	Records Imported									
	Records Updated:	-								
	Records Created:	0								
	Exceptions:	0								
	Output query of n	-	New Gi	ft						
	Output query of n	cords updated:								
	Exception file:		C:\Files	Mmport_Files)exce	ptions imp					
Crite										
	Type:	Gift								
	File name:	C:\Files\Impo		S.CSV						
	Function:	Import new re	cords							
	Options:	None								
	ID Used:	Import ID								
	Header: Format:	First line of ir Delimited	n port file							
	romat.	Fields are sep	anatad har an							
		Text qualifier								
Field	mapping	rext quinner	15 quotanon							
	Import field nam	e Rais	er's Edge fiel	la						
	FundID	Fun	4							
	GFDate	Date								
	GFType	Тур	e							-1
•	OTTA	A								
ت										

The report displays the results of the import, the criteria entered on the import parameter file, the field mapping, and the details about any exceptions.

- 34. To close the control report click the "X" in the upper right corner. You return to the import parameter screen.
- 35. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.

Save Impo	rt As	×
<u>N</u> ame:	Gift Import	Save
Description:	10/10/2004	Cancel
	Other users may run this import	
	Other users may modify this import	

- 36. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import file.
- 37. Click Save. You return to the import parameter screen.
- 38. To exit the import parameter screen, select File, Close.

# Working with a Raiser's Edge Import File in Excel

In **The Raiser's Edge**, you can create an import file that you can then use in other applications, such as *Excel*. For example, if you have a large number of records in which you want to change information, you can create an import file of these records and the specific data fields you want to change. You can then access this information in a spreadsheet software program, such as *Excel*, make any necessary changes, and use the same file to import the updated information back into **The Raiser's Edge**.

#### • Working with a Raiser's Edge import file in Excel

This procedure shows you how to use *Excel* to work with a **Raiser's Edge** import file. The following examples are based on the "Batch21.imp" import file created in the procedure "Creating a gift import in The Raiser's Edge" on page 52.



1. In *Excel*, select **File**, **Open** from the menu bar. The Open screen appears.

 In the Files of type field, select "All Files (\*.\*)". Then map to the location of the import file you created in The Raiser's Edge. This is the path you entered in the What file do you wish to create? frame on the General tab. 3. Once you locate the import file, click **Open**. Because you saved your import file as an \*.imp file, the Text Import Wizard - Step 1 of 3 screen appears.

Text Import Wizard - Step 1 of 3	? ×
The Text Wizard has determined that your data is Fixed Width. If this is correct, choose Next, or choose the data type that best describes your data. Original data type	
Choose the file type that best describes your data:	
Delimited - Characters such as commas or tabs separate each field.     Fixed width - Fields are aligned in columns with spaces between each field.	
Start import at <u>r</u> ow: 1 🛨 File <u>o</u> rigin: Windows (ANSI)	
Preview of file D:\ImportFiles\Batch21.imp.	
1 GFDate, FundID	▲
2 "04/11/1997", "Botanical Garden Fund"	
3 "09/05/1998", "Botanical Garden Fund"	
4 "06/05/1999", "Botanical Garden Fund" 5 "12/26/1999", "Smith-Brown Scholarship Fund"	
3 12/20/1999, Smith-Brown Schotarship Fund	
Cancel < Back Next > Einish	

- 4. You must enter the formatting information you selected when you created your import file. For this scenario, in the **Original data type** frame, select **Delimited**.
- 5. In the **Start import at row** field, select "1" because your import file starts on the first row of the spreadsheet.
- 6. In the **File origin** field, select "Windows (ANSI)", because you created the import file in **The Raiser's Edge**, a Windows-based program.
- 7. Click Next. The Text Import Wizard Step 2 of 3 screen appears.

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below. Delimiters Delimiters Treat consecutive delimiters as one Space Other: Text gualifier: Data preview Data preview FundID
Image: Tab       Semicolon       Image: Tab       Treat consecutive delimiters as one         Image: Tab       Space       Other:       Image: Tab       Text gualifier:         Data preview       Image: Tab       Image: Tab       Image: Tab       Image: Tab
·
GFDate FundID
04/11/1997 Botanical Garden Fund
09/05/1998 Botanical Garden Fund
06/05/1999 Botanical Garden Fund
12/26/1999 Smith-Brown Scholarship Fund
T

The information entered on this screen depends on the information selected on the File Layout tab in *The Raiser's Edge*.

8. In the **Delimiters** frame, mark **Comma**.

- 9. In the **Text qualifier** field, select quotation marks ("").
- 10. Do not mark **Treat consecutive delimiter as one**.
- 11. Click **Next**. The Text Import Wizard Step 3 of 3 screen appears.

Text Import Wizard - Step 3 of 3		? ×
This screen lets you select each column and set the Data Format. 'General' converts numeric values to numbers, date values to dates, and all remaining values to text.	Column data format © General © Iext © Date: MDY	
<u>A</u> dvanced	O Do not import column (skip)	
Data preview		
General General Groate FundID		
04/11/1997 Botanical Garden Fund		
09/05/1998 Botanical Garden Fund		
06/05/1999 Botanical Garden Fund		
12/26/1999 Smith-Brown Scholarship Fu	nd	
Cancel	< Back Next > E	<u>i</u> nish

- 12. In the **Column data format** frame, select **General** and the program converts numeric values found in the import file to numbers in *Excel*, date values found in the import file to dates in *Excel*, and all other information found in the import file to text in *Excel*.
- 13. Click Advanced. The Advanced Text Import Settings screen appears.

Advanced Text Import Settings							
Settings used to recognize n	umeric data						
Decimal separator:	. · ·						
Thousands separator:	, 💌						
Note: Numbers will be displayed using the numeric settings specified in the Regional Settings control panel.							
Reset	OK Car	ncel					

- 14. You can select the **Decimal separator** and **Thousands separator** used in numeric data in your import file. For this scenario, do not change the default settings.
- 15. Click **OK**. You return to the Text Import Wizard Step 3 of 3 screen.

16. Click **Finish**. The import file information appears in an *Excel* spreadsheet.

×.	licrosoft Ex	cel - Batch	21.imp																_ 6	۲ ×
🔊 File Edit View Insert Format Iools Data Window Help Acrobat									_ 6	л×										
D	🚔  🔒	) 🖨 🖪	🌮 🐰 🖻	1 🛍	<b>K</b> D +	۲	Σ	f≈ 🁌	l 🛍	, 🝳	Arial		•	10 👻	в	I	U	<b>*.</b> 0	.00 • .0	2
	A26	<b>T</b>	=																	
	A	В	C	0	)	E			-	G		Н			J		Κ		L	
1	GFImpID		FundID											_		_				-1
2			Botanical																	
3			Botanical											_						
4			Botanical											_		_				
			Smith-Bro			nb F	und							_		_				
6			e Botanical													-				
	00001-057		Acquisitio	n Fund	1											-				
8	00001-057	-	∮ Building F ∮ Botanical	una Originale																
9			F Botanical Internation			al NL		Dise	- <b>t</b>	aliat Erm						-		_		
11	00001-057	20000000000	Finiternation Playgroun	ai Rei	iei run	0, IN3	atura	Disa	ster H	celler Fur				-		-				
12	00001-057		- Flaygroun	u one												-				
13																-				
14								-						-		-		-		
15														-		-		-		
16																		-		
17																-		-		
18																-		-		
19																-		-		
20																				
21																				
22																-				
23																				
24																				_
25																-				
лî,	 	1	1								4									цŤ
	i 🕨 🕅 (Bat adv	ui 21 /									- 14				_				, ,	11

17. From here, make your necessary changes and save the file.

X Microsoft Excel - Batch 21.imp  B File Edit View Insert Format Icols Data Window Help Acrobat												
	🗃 🖬 🔒					f∝ ĝ↓ 🛍	. 🕐 🐥 🗛	rial	- 1	0 <b>- B</b>	ΙU	*.8 .08 ÷
A26 V =												
	Α	B	C	D	E	F	G	Н	1	J	K	L L .
1	GFImpID	GFDate	FundID									
2	00001-057											
3	00001-057-											
4	00001-057											
5	00001-057											
6	00001-057											
7	00001-057-											
8	00001-057											
9	00001-057	07/31/200	Building F	und								
	00001-057											
11	00001-057	07/31/200	Building F	und								
12												
13												
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24												
25												
	▶ N Bat	ch 21 /						4				<b>           </b>   [ [
Rea												

18. For this procedure, change all Gift Dates to "7/31/2001" and Fund IDs to "Building Fund".

19. To save the changes, from the menu bar, select File, Save As. The Save As screen appears.

Save As		? ×
Save in:	📄 ImportFiles 💌 🔶 🛍 🗮 🛪 Tools 🗸	
() History	Cash, Stock & Pledge Gifts.csv Constituent Update with 3 Attributes.csv gifts.csv Import1.csv	
Personal	Samport2.csv SampleImportFile.csv	
Desktop		
Favorites		
	File name: "Batch 21.imp"	e
Web Folders	Save as type: CSV (Comma delimited) (*.csv)	el

- 20. "Batch21.imp" defaults in the **File Name** field. To override the existing "Batch21.imp" file, accept the default or to create a new file enter a new name.
- 21. In the Save as type field, select "\*.csv". This is the most user-friendly format for *The Raiser's Edge*.
- 22. Click Save. A warning message similar to the following may appear.

Microsoft	Excel
٩	<ul> <li>Batch 21.imp may contain features that are not compatible with CSV (Comma delimited)</li> <li>Do you want to keep the workbook in this format?</li> <li>To keep this format, which leaves out any incompatible features, click Yes.</li> <li>To preserve the features, click No. Then save a copy in the latest Excel format.</li> <li>To see what might be lost, click Help.</li> </ul>
	<u>Yes</u> <u>N</u> o <u>H</u> elp

- 23. Click Yes to continue.
- 24. To close the Excel spreadsheet, click File, Exit from the menu bar.
- 25. You are now ready to import the new information back into *The Raiser's Edge*. For information about importing the file back into The Raiser's Edge, see "Importing the updated data back into The Raiser's Edge" on page 62.

# Index

# Α

address update import 6 addresses 26

# С

constituent attribute import 41 import 6, 26 creating an import file *Excel* 27, 41, 73 *The Raiser's Edge* 6, 52 currency, import 5

## D

defaults, import 5 delimited defined 3

# E

*Excel* creating import files in 27, 41, 73 importing from 32, 44, 76 opening a *Raiser's Edge* import file in 85

#### F

fields, import 4

## G

gifts 52

## Η

header file 2

# 1

import address updates 6 addressee/salutations 5 constituent 6, 26 constituent attributes 41 defaults 5 delimited format 3 field, rules 4 gift 4, 52 header file 2 IDs 3 import file, layout rules 2 pledge 5 relationships 6 updating information in The Raiser's Edge 17 importing from a spreadsheet 32, 44, 76

## L

lookup tables 5

## 0

open a Raiser's Edge import file in Excel 85

## Ρ

pledges, rules 5

# R

**Raiser's Edge, The** creating a gift import 52 creating constituent address import 6 relationship, rules 6 relationships 26 rules, importing 2

## S

spreadsheet creating import files in 27, 41, 73 importing from 32, 44, 76

# Т

telephone numbers 26

# U

updating data 6, 62

#### corporate headquarters

#### Blackbaud, Inc.

2000 Daniel Island Drive Charleston, SC 29492 USA

- Web www.blackbaud.com
- Phone 843.216.6200
- Fax 843.216.6100

#### support

Review the Customer Support Guide for information about our online resources and support procedures. Download the Customer Support Guide from our Web site's Support Overview. http://support.blackbaud.com

http://support.blackbaud.com

#### documentation

We welcome your comments and suggestions about our user guides and help files. In the subject line of your email, please include the product name and version number.

documentationcomments@blackbaud.com

#### sales

Contact us for more information about our products and services.

- Email solutions@blackbaud.com
- Phone 800.443.9441
- Fax 843.216.6111

#### forms

Contact Blackbaud Forms to learn about preprinted material designed specifically for Blackbaud software. Learn more about our checks, Business and Development Office forms, membership cards, Patron Edge tickets, and more.

- Web http://forms.blackbaud.com
- Phone 866.422.3676

#### international contacts

#### Blackbaud Europe Ltd

11 York Road London SE1 7NX

- Phone +44 (0) 20 7921 9600
- Fax +44 (0) 20 7921 9601

38 Queen Street Glasgow G1 3DX Scotland

- Phone +44 (0) 141 575 0000
- Fax +44 (0) 141 575 0999
- Web www.blackbaud.co.uk
- Email solutions@blackbaud.co.uk admin@blackbaud.co.uk support@blackbaud.co.uk
- Support (UK Local Rate) 0845 658 8500
- Support (From Outside UK) +44 (0) 141 575 0801
- The Patron Edge Support (UK Local Rate) 0845 658 8580
- The Patron Edge Support (From Outside UK) +44 (0) 20 7921 9600

#### Blackbaud Gift Aid

Phone 01580 892235 (UK Local Rate) +44 (0) 1580 892235 (From Outside UK)

#### Blackbaud Pacific Pty Ltd.

ABN 73 095 925 170 Suite 4, 561-577 Harris Street Ultimo NSW 2007 Australia

Mailing Address PO Box K736

Haymarket NSW 1240 Australia

- Web www.blackbaud.com.au
  - Email sales@blackbaud.com.au support@blackbaud.com.au administration@blackbaud.com.au

Freecall 1800 688 910 Australia

0800 444 712	New Zealand
800 6162 205	Singapore
 <i></i>	

- Phone +61 2 9211 7366
   Fax +61 2 0211 7607
- Fax +61 2 9211 7607

## about Blackbaud

Blackbaud is the leading global provider of software and related services designed specifically for nonprofit organizations. Approximately 16,000 organizations use one or more of Blackbaud products and consulting services for fundraising, financial management, Web site management, school administration, and ticketing. Blackbaud's solutions include The Raiser's Edge®, Team Approach®, The Financial Edge<sup>™</sup>, The Education Edge<sup>™</sup>, The Patron Edge<sup>®</sup>, Blackbaud<sup>®</sup>NetCommunity<sup>™</sup>, The Information Edge<sup>™</sup>, WealthPoint<sup>™</sup>, ProspectPoint<sup>™</sup>, and donorCentrics<sup>™</sup>, as well as a wide range of consulting, analytical, and educational services. Founded in 1981. Blackbaud is headquartered in Charleston, South Carolina and has operations in Cambridge, Massachusetts; Toronto, Ontario; Glasgow, Scotland; London, England; and Sydney, Australia.

REV - 031507

© 2007, Blackbaud Inc.

This manual is for informational purposes only. Blackbaud makes no warranties, expressed or implied, in this summary. The information contained in this document represents the current view of Blackbaud, Inc., on the items discussed as of the date of this publication.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. The names of actual companies and products appearing herein may be the trademarks of their respective owners.

#### 2 CHAPTER