Import Guide

Introduction

This Import Guide provides some suggestions, instructions, and warnings to keep in mind as you plan and then import your data into FrontStream CRM. We assume that you have a solid knowledge of your current donor files and donor management system.

Getting your existing data into FrontStream CRM is one of the most important things you'll do as a new FrontStream CRM customer. Using the built-in importer, you can bring a large amount of data into FrontStream CRM from your existing files or application without manually re-entering everything. A successful import requires adequate time and effort to clean up and organize your existing data so that everything flows into FrontStream CRM as easily possible, and so that you can be up and running quickly.

Before beginning the import process, it's a good idea to read through the **FrontStream CRM Manual**, in particular the sections on Donors, Donations, Mailings, and Settings. It is also wise to spend some time working with the sample database in FrontStream CRM to familiarize yourself with how the software works. The better informed you are going in, the better your decisions will be about how to import your data. It is important to understand, among other things, donor profiles, relationships, custom fields, donor groups, mailing lists, and SmartLists.

Don't forget that an import does not have to be permanent. You can always do test imports into empty databases to make sure that things are coming across the way you want. As long as you back up your database before and after imports, you can easily revert to an earlier state if something goes awry. It is very easy in FrontStream CRM to create new databases and test importing.

When you are testing, try doing a subset of your data first – no sense spending time to import 5,000 donors or donations if you're not sure you have everything set up properly. Start with 50 (make a copy of your import file and delete all but the first 50 rows), and practice importing that information. When you've got the hang of it, import the rest.

FrontStream CRM Import Services

FrontStream can provide assistance with your import in two ways. We can provide limited technical support when you contact us via the Help center at https://giftworks.zendesk.com/hc/en-us. Or you can have FrontStream import and convert your data for you. This service typically costs between $1,000.00 and several thousand dollars, depending on the amount and complexity of your existing data. We can usually accomplish the conversion in about 10 to 15 business days. Please visit http://www.frontstream.com/crm/features/add-ons/import-services/ for more information.

Import Sources

FrontStream CRM can import information from a Microsoft Excel workbook (.xls or .xlsx) file, from a Microsoft Access database (.mdb or .accdb) file, or from delimited text (.csv or.txt) files. If your existing information is not already in one of these formats, you will need to export your data into one of them. Most applications that export information will export to one of these formats. Consult your existing application's documentation or technical support for information on exporting from your particular application.

Importing from Microsoft Excel (.xls or .xlsx)

Note: Importing from Office 2007 or higher (.xlsx or .accdb) files may require you to download and install a driver from Microsoft's web site to enable FrontStream CRM to properly read the file. In this event, FrontStream CRM will provide information on-screen during the import process, including a link to the driver download site.

The FrontStream CRM Importer looks for your information to be in rows, ideally with column headers. Below is an example of well-organized data that would be easy to import:

Prefix	FirstName	MiddleName	LastName	Suffix	AddressLine1
Mr.	Bob		Miller		123 Market St.
	John	P.	Peterson		3389 Russet Ave.
	Lester		James	Jr.	482 Maine Way

If you do not have column headers (FirstName, LastName, etc., in the image above), you can still import into FrontStream CRM, but it will not be as easy to distinguish your data. FrontStream CRM will give your columns names of F1, F2, F3, etc. If possible, it is worth taking the time to edit the workbook to add column headers.

Rules for Column Headers in Excel Workbooks

To avoid issues with your import, make sure you follow the rules below when adding or reviewing your column headers.

1. No spaces: If your column headers have leading or trailing spaces, or spaces anywhere within the column name, remove them. For example, use "FirstName" instead of " First Name ".
2. Avoid non-alphanumeric characters: Stick to letters and numbers for your column headers. Avoid slashes, ampersands (&), colons, semi-colons and other symbols and punctuation.
3. Limit the length of your column headers: Keeping your column headers to 25 characters or fewer is a good idea.
4. Use distinct column headers: Make sure the header for each column is unique.
5. Have a header for each column: Be sure that you have a header for each column that contains data.

Rules for cell contents in Excel workbooks

1. No special characters: In your Excel workbook, especially if you've exported to Excel from another application, there may be characters, such as tabs, line breaks, or page breaks that appear as squares ("□"). These characters may cause the importer to fail. These characters can be difficult to locate, but you must get rid of them to

perform your import. One way to find them is to save the workbook (from Excel) as a .csv (comma-separated values) file, and then open that file in a text editor, like Notepad. It can be easier to see them when scanning a text file than a workbook.

2. Dates should be full dates: FrontStream CRM recognizes only dates with month, day and year (for example, 02/28/1969). If you have dates that are only month and year or only year, you will need to modify them.

3. Field length: FrontStream CRM limits the length of the information it imports into each field to the length of that field in FrontStream CRM (see **Appendix A: Importable Fields** or **Appendix B: Import Quick Reference**). No matter how big the field in FrontStream CRM, the maximum length of information FrontStream CRM will import is 500 characters for a single field. So, if you're importing a Note, although the FrontStream CRM field is a Memo field that accepts any length of data, the importer only imports up to 500 characters.

General Guidelines for Importing from Excel

1. If you have multiple Excel spreadsheets to import, or multiple worksheets from within a spreadsheet, you'll need multiple passes through the importer to import the information from each worksheet. For example, you may either have multiple files that contain different sets of data (for example, addresses, donations, donor information), or different lists that you are importing (perhaps an old mailing list and a shared list from another organization).

2. You can only import one worksheet from each Excel workbook at a time. FrontStream CRM lets you specify which worksheet within your workbook you want to import. If you have multiple worksheets, you'll either need to make multiple passes through the importer, or combine the data into one sheet. Note that unless the data in each sheet contains very nearly the same fields, it can be difficult to combine sheets. It may be easier to make multiple passes through the importer.

3. Your data must be organized with donor information in rows, not columns.

4. If your worksheet is organized in columns, you can use Copy - Paste Special and then click the Transpose checkbox to paste your data into rows, rather than columns.

5. Your Excel data must either begin in the first row of your worksheet or must begin in the second row, with column headers in the first row. If either of these is not the case, you must delete any blank rows at the top of the worksheet until it meets these criteria.

6. There must not be any merged cells in the Excel file you are importing. This type of formatting will not allow the data to import properly and whole columns or rows of data will fail to be imported.

7. Your data must be in one contiguous block per worksheet. You cannot import a block of data at the top of a worksheet and another block of data below it on the same sheet. If the data in both blocks has the same fields, you can delete the blank rows between the blocks. If the blocks contain different information, you should move one of the blocks to a separate sheet.

8. You can import only 15 donations per row from the Excel spreadsheet. If your spreadsheet contains more than 15 donation columns per row, then you will need to make multiple passes through the importer to import all of the donation data.

Importing from Access

Note: Importing from Office 2007 or higher (.xlsx or .accdb) files may require you to download and install a driver from Microsoft's web site to enable FrontStream CRM to properly read the file. In this event, FrontStream CRM will provide information on-screen during the import process, including a link to the driver download site.

Importing from a Single Table

If all of your donor information is stored in a single table your import process will be almost identical to the process of importing an Excel spreadsheet. Normally, if your data is all in one table, you will have a row for each donor and multiple columns for each donation, address, etc.

Importing such a table is pretty straightforward. You use the importer and map the fields to the FrontStream CRM fields as you would for an Excel spreadsheet. Remember to keep track of the number of donations you have for each donor. If the table contains fields for more than 15 donations in each record, you will need to make more than one pass through the importer.

Importing from Multiple Tables

The second type of Access database you may want to import will have multiple tables, typically with the donor's main information in one table, donations in another table, possibly addresses in a third table, phone numbers in another table, and so on. This setup allows you to have multiple addresses, donations, etc. per donor without having to add columns to your main donor information table. Each donation or other information is usually matched back to the main donor table by an ID column or other primary key field.

In this case, you have two choices for getting the data imported into FrontStream CRM:

1. You can import each table in a separate pass through the importer, and use a custom Donor field for matching data.
   a. Your first import should contain the necessary information (donor / organization name, etc.) required to create a new donor in FrontStream CRM if an existing matching donor is not found
   b. You should create a custom field to store the primary key (for example, "Old System ID") for each donor in FrontStream CRM, so that subsequent imports can use this value for matching
   c. Second and subsequent imports (for donations, addresses, etc.) should use the custom field value to check for a matching donor in FrontStream CRM
2. You can create Access queries that join data from multiple tables, and import the results of those queries into FrontStream CRM.
   a. You need to write queries that join the tables using the primary key field. These queries will need to output the primary data (First Name, Middle Name, Last Name, and/or Organization Name or Primary Key Field) and the information from the other table (donations or addresses, etc.).
   b. Each query may have multiple rows per donor—for example in the case that a donor has multiple donations or multiple addresses.
   c. You can then import the result of these queries into FrontStream CRM in the same manner you would import from an individual table.
   d. If you import multiple queries, you should import queries containing primarily donation, address, phone/email or any other information not from the main

donor table first. Next, import the secondary information—for example donations, groups, etc.

Rules for field names in Access Tables

To avoid issues with your import, make sure you follow the rules below when adding or reviewing the field names in your Access tables.

1. No spaces: If your field names have leading or trailing spaces, or spaces anywhere within the field name, remove them. For example, use "FirstName" instead of " First Name ".
2. Avoid non-alphanumeric characters: Stick to letters and numbers for your field names Avoid slashes, ampersands (&), colons, semi-colons and other symbols and punctuation.
3. Limit the length of your field names: Keeping your column headers to 25 characters or fewer is a good idea.

Rules for field contents in Access database files

1. Dates should be full dates: FrontStream CRM only recognizes dates with month, day and year (for example, 02/28/1969). If you have dates that are only month and year or only year, you will need to modify them.
2. Field length: FrontStream CRM limits the length of the information it imports into each field to the length of that field in FrontStream CRM (see ***Appendix A: Importable Fields*** or ***Appendix B: Import Quick Reference***). No matter how big the field in FrontStream CRM, the maximum length of information FrontStream CRM will import is 500 characters for a single field. So, if you're importing a Note, although the FrontStream CRM field is a Memo field that accepts any length of data, the importer only imports up to 500 characters.

Importing from Text Files (.txt or .csv)

Data stored in text files is usually "delimited," which means that the different fields of data are separated by a certain character. Commas are commonly used for this purpose, as are semicolons, pipes ("|"), and tabs. Importing from text files is very similar to importing from Excel spreadsheets.

During the import, you will indicate whether the first row contains column headers (a.k.a. field names), and also tell FrontStream CRM what the delimiters (the characters that separate the fields) are. The guidelines for importing data are otherwise the same as those for importing from Excel.

Rules for Column Headers in Text Files

In order to avoid issues with your import, make sure you follow the rules below when adding or reviewing your column headers.

1. No spaces: If your column headers have leading or trailing spaces, remove them. For example, use "FirstName" instead of " First Name ".
2. Avoid non-alphanumeric characters: Stick to letters and numbers for your column headers. Avoid slashes, ampersands (&), colons, semicolons and other symbols and punctuation.
3. Limit the length of your column headers: Keeping your column headers to 25 characters or fewer is a good idea.

4. Use distinct column headers: Make sure the header for each column is unique.
5. Have a header for each column: Be sure that you have a header for each column that contains data.

**Rules for cell contents in Text Files**

1. No special characters: In your Text file there may be characters, such as tabs, line breaks, or page breaks, which appear as squares ("□"). These characters will cause the importer to fail. These characters can be difficult to locate, but you must get rid of them to perform your import.
2. Dates should be full dates: FrontStream CRM only recognizes dates with month, day and year (for example, 02/28/1969). If you have dates that are only month and year or only year, you will need to modify them.
3. Field length: FrontStream CRM limits the length of the information it imports into each field to the length of that field in FrontStream CRM (see **Appendix A: Importable Fields** or **Appendix B: Import Quick Reference**). No matter how big the field in FrontStream CRM, the maximum length of information FrontStream CRM will import is 500 characters for a single field. So, if you're importing a Note, although the FrontStream CRM field is a Memo field that accepts any length of data, the importer only imports up to 500 characters.
4. If the data in the cell contents includes the delimiter, you must enclose the value in double-quotes for it to import properly. For example, if you are importing from a CSV file and the delimiter that separates cell values is a comma, then a cell value that contains a comma (for example, the text of a note) must be enclosed within double-quotes or the import will interpret the comma in the cell value as the delimiter, causing the import to fail or to return unexpected results.

Preparing for Import

Creating a new Database

Note: You should not import your information into the FrontStream CRM sample database. If you are using the sample database, you should create a new database (as described below) before importing your data. Remember, too, that you can always create a new, empty database to test importing into before you do your final import.

To create a new database file: open FrontStream CRM and from the sign-in screen click the **Options** link to the right of the database name. Then choose **Create a new database** from the menu that appears.
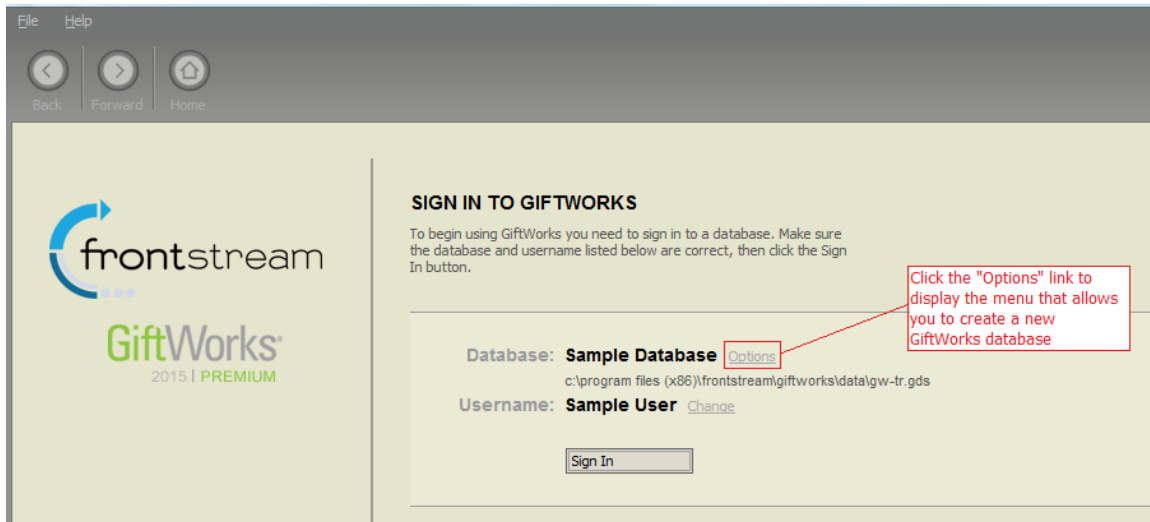
Enter your user name and a name for the new database and choose the location where you will save the database file.
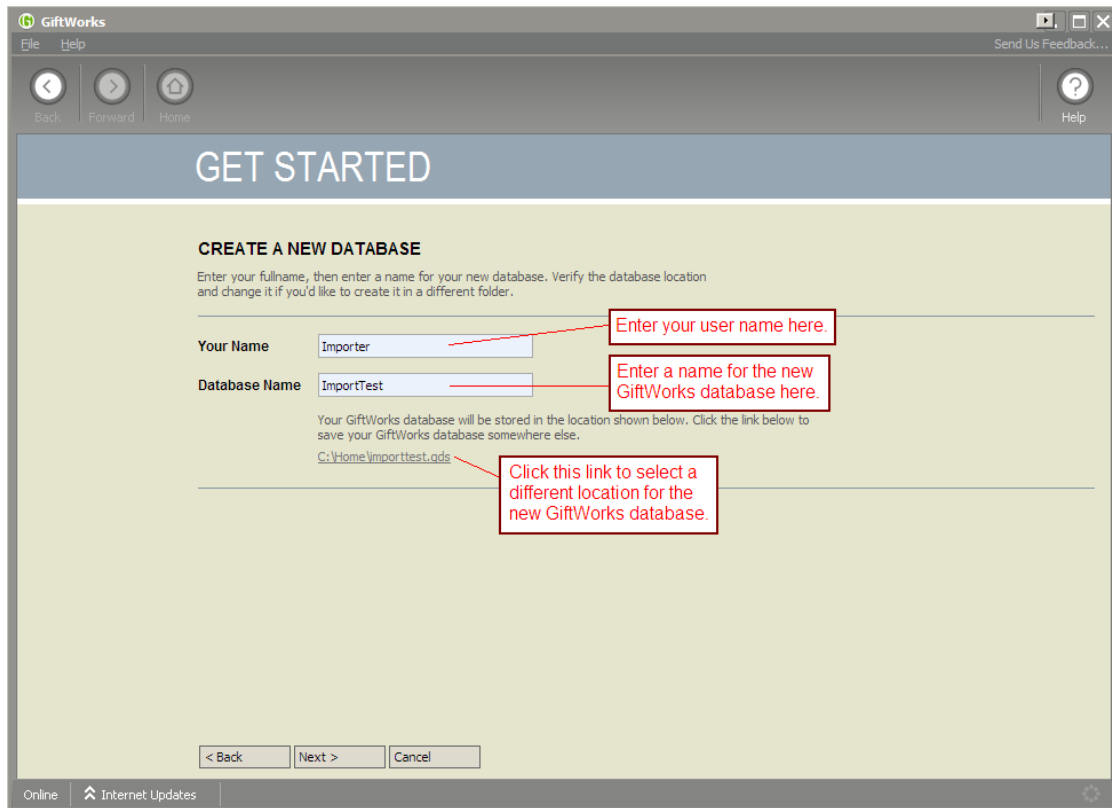
Click **Next** and then Click **Finish** to get started using FrontStream CRM. Sign in to your new database.

Importing into an existing database

If you have already begun entering or importing data into a FrontStream CRM database it is imperative that you **back up your data prior to each import**.

To backup your Database, click on **Settings** from the FrontStream CRM toolbar, select the **Importing, Exporting, and Data Management** menu option (or **Database, File and Maintenance for FrontStream CRM 2013)**, select the **Manage Your FrontStream CRM Database** menu option, and then click the **Back up Database** link.

Importing and Matching to Existing Donors

A key consideration when importing data into FrontStream CRM is matching up the information you are importing with donors already in your database, or matching the data that is in multiple files to be imported. In some cases, you will want to add new donors to FrontStream CRM, and in other cases you will want to update information for existing donors. FrontStream CRM provides options for you to specify how information from your source import file will be used to match existing donors or create new donors, as shown here:

If you are matching up information to existing donors, you have two options: You can let FrontStream CRM decide how to determine whether the donor exists (based on the name fields you map) or you can choose the fields to use to match, typically some sort of unique identifier.

When you let FrontStream CRM decide, the following conditions apply:

There is a minimum of information that must be mapped to import information into FrontStream CRM. You must map at least either:

1. One of: First name or Last name or Organization name, **or**
2. Display name

If you don't map at least one of these fields, no information will be imported. One of those mapped fields must contain data, or the data in that row of the import file will not be imported.

To match up donor data that is being imported with a donor already in FrontStream CRM, the importer looks at the following rules, in the order below:

-   If you map first name, last name, spouse first name, spouse last name and/or organization name, the importer looks for an exact match of all name fields that are mapped. If the data in all of the fields matches between the import file and FrontStream CRM (including blank fields), the importer will update that donor. If there is more than one donor in FrontStream CRM that matches in the same manner, the importer will update (or add data to) the first such donor it finds.

    -   Note that the match must be exact. "Bob Smith" and "Robert Smith" are considered two different donors, no matter what other information (addresses, phone numbers, etc.) they may have in common.

- Note that "spouse" information is taken into account in the name matching. Therefore one import source record containing "Rob Smith" will not match a Household donor in FrontStream CRM containing "Rob and Diane Smith".
- Note that "Organization Name" is taken into account in the name matching. Therefore one import source record containing "Rob Smith" will not match a donor in FrontStream CRM containing "Rob Smith" with Organization name of ABC Company.
- If you map display name (and not first name, last name, or organization name), the importer looks for an exact display name match. If the data in the display name field matches between the import file and FrontStream CRM, the importer will update that donor. If there is more than one donor in FrontStream CRM that matches in the same manner, the importer will update (or add data to) the first such donor it finds.
  - Again, note that the match must be exact. A FrontStream CRM donor with a display name of "Acme, Incorporated" is not the same as a donor with a display name of "Acme, Inc."

When you choose your own fields to use to match, the following conditions apply:

- You must choose the import field with the matching information. This is typically some sort of unique identifier or key from your data source. Or it could be the unique donor id from FrontStream CRM. **NOTE** – The value you select must be unique for each donor; do not choose a field like address name or street address which could apply to more than one donor. The best choice for this field is a donor ID if one is available.
- You must choose the FrontStream CRM field that has the matching information. This is typically some sort of custom field in FrontStream CRM or the FrontStream CRM Donor ID.

You are telling the importer to use the value from the import field to try to find a matching donor in FrontStream CRM by comparing the value to the specified FrontStream CRM field. The import field chosen for matching must contain data or that row of the import file will not be imported (unless matching to the FrontStream CRM Donor Id).

You must also indicate what the importer should do if a matching donor is not found in FrontStream CRM.

1. Add a new donor to FrontStream CRM. This is typically the choice if you are importing from a source that includes some donors that already exist in FrontStream CRM and others that don't. If you choose this option, there are several mapping requirements.
   - You must map the matching fields to each other, unless you are matching to the FrontStream CRM donor ID. When new donors are added, the matching value is stored in the mapped field in FrontStream CRM. For example, if you are using a field named "PeopleID" from your source file to match existing donors using a custom field in FrontStream CRM called "OldPersonID", then you must also map the "PeopleID" field to the "OldPersonID" field so it is correctly populated when a match is not found and a new donor is created.
     i. **IMPORTANT** – You can populate a custom field in this manner, but not the FrontStream CRM donor ID. The FrontStream CRM donor ID is a unique sequential number that is automatically assigned when a donor is created, and you cannot override its value. Therefore, if you have an existing donor ID from your previous system, you should create a custom field called "Old Donor ID" (or similar) for

matching, as you cannot force the FrontStream CRM donor ID to match the ID from your old system. Only use the FrontStream CRM donor ID for matching when the source of the import is data previously exported from the FrontStream CRM database.

- You must map at least either:

1 One of: First name or Last name or Organization name, or

2 Display name

FrontStream CRM cannot create a new donor without a name. Therefore, one of those mapped name fields must contain data, or the data in that row of the import file will not be imported.

If a matching donor is not found, the mapped name fields are used to add a new donor to FrontStream CRM.

2. Ignore the row of import data. This is typically used to import additional information, such as donations, for donors that are already in FrontStream CRM.

If a matching donor is not found, a donor is not added and any information in that row of the import file will not be imported. If the field used for matching does not contain data, that row of the import file will not be imported.

Handling Receipting of Imported Donations

If you are importing donations, you can choose the receipting option that best suits your needs. You can choose that 'None of the donations should be receipted in FrontStream CRM' or to 'Allow donations to be receipted in FrontStream CRM based on donor defaults or mapped values'. If your import file does not contain any donations, this area will be ignored.

Special Situations

Importing data from multiple files

If your data is split between multiple files, tables, queries, or worksheets, you will want to import things in a certain order to achieve the best results. If you have more than 15 donations in any row of data in your import file, skip to "More than 15 donations per donor row," below. To the extent that you have files that match the descriptions below, you should follow this order:

1. Import all pieces of the name for each person (prefix, first name, middle name, last name, and suffix, as well as the same for spouse / second name), and/or the organization name, if applicable. The name fields are required when creating new donors in FrontStream CRM. Bear in mind that subsequent imports, if matching on name fields, must contain exactly the same name data in order to properly match the correct FrontStream CRM donor.

2. For donors with no profile, affiliate donors, and donors with household profiles, the organization name field is used only to store the name of the donor's employer – it does not create an organization profile or link the donor to an organization. FrontStream CRM will create the appropriate donor type – donor with no profile, affiliate donor, donor with household profile, or donor with organization profile based on choices you make during the import process.

   The exception is for a household profile where your data includes two people within one first name field. An example would be "James and Mary" as the first name and "White" as the last name. In this case you can include data that specifies a donor with a household profile, or you can import them as a donor with no profile, if you do not need to track individual information about the household members.

   As you import donors, FrontStream CRM calculates the salutation and addressee fields. If you are not satisfied with the FrontStream CRM defaults for these fields, you can manually edit them once they are in FrontStream CRM, or you can include customized data in the final import pass. FrontStream CRM also calculates the display name based on your customized default, if you do not import a display name value.

3. Import address and other contact information in one or more passes. Note that as each address is imported, if mapped as "Address 1", it becomes the "primary mailing address" for that donor. Therefore, if you are importing multiple addresses for donors you should sort your import data so that the primary mailing address is the last one imported, or separate your mailing information to import all "informational" addresses first and primary mailing addresses in a separate final pass.

4. Import additional donor information in one or more passes, including groups, custom fields and donor fields such as status and category. (If you do not have a lot of address and other donor information, it may be possible to combine steps 3 and 4.)

More than 15 Donations per Donor Row

If you have more than 15 donations per donor row, you will need to make more than one pass through the importer. On your first pass through the importer, import the following information:

- Field(s) required to match the donation information to the correct donor (which may include First name, Middle name, Last name, Spouse name, Organization name, etc. or
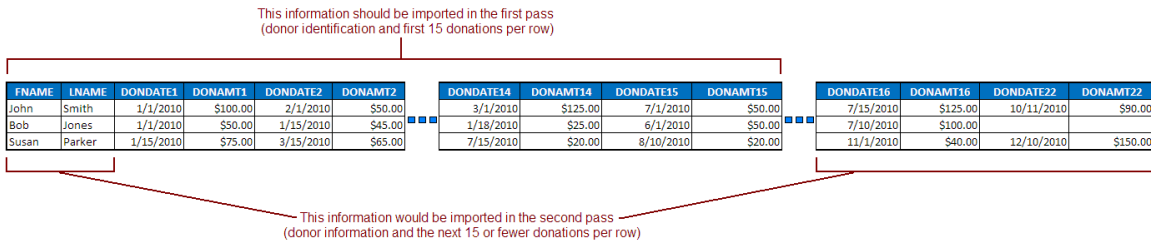
the unique key to match against a custom FrontStream CRM field or the FrontStream CRM donor ID.)

- Donation information for the first 15 donations (amount, date, campaign, fund, notes, etc.)

In this first pass, FrontStream CRM will attempt to find a matching donor and can create a donor if name fields are included and import settings are selected to allow donor creation. Once the donor is created or an existing donor match is found, FrontStream CRM will import the donation(s) and link them to the donor.

Continue making passes through the importer, importing a maximum of 15 donations per row in each pass, until all donations are imported. During each pass import the same information, except import the donation information for the next 15 donations on the row. During these passes, FrontStream CRM links the new donations to the donors created in the first pass.

Here's an illustration of how this works:

This information should be imported in the first pass
(donor identification and first 15 donations per row)

FNAME	LNAME	DONDATE1	DONAMT1	DONDATE2	DONAMT2	DONDATE14	DONAMT14	DONDATE15	DONAMT15	DONDATE16	DONAMT16	DONDATE22	DONAMT22
John	Smith	1/1/2010	$100.00	2/1/2010	$50.00	3/1/2010	$125.00	7/1/2010	$50.00	7/15/2010	$125.00	10/11/2010	$90.00
Bob	Jones	1/1/2010	$50.00	1/15/2010	$45.00	1/18/2010	$25.00	6/1/2010	$50.00	7/10/2010	$100.00		
Susan	Parker	1/15/2010	$75.00	3/15/2010	$65.00	7/15/2010	$20.00	8/10/2010	$20.00	11/1/2010	$40.00	12/10/2010	$150.00

This information would be imported in the second pass
(donor information and the next 15 or fewer donations per row)

Bear in mind that multiple passes are needed only if the donation information for each donor is on the same **row** of data. If you import a file with each donation on individual rows (or less than 15 donations per row), as in the illustration below, then you can import any number of donations per donor without making multiple passes through the importer:

FNAME	LNAME	DONDATE1	DONAMT1
John	Smith	1/1/1996	$50.00
John	Smith	2/15/1997	$25.00
John	Smith	2/20/1997	$80.00
John	Smith	10/11/2011	$150.00
John	Smith	11/1/2011	$210.00
Bob	Jones	1/1/1998	$25.00
Bob	Jones	1/13/1998	$10.00
Bob	Jones	8/1/2010	$100.00
Bob	Jones	11/15/2010	$100.00

Any number of donations can be imported in a single pass if there are fewer than 15 donations per row.

NOTE – If you are importing only one donation per row, as in the example above, the donation fields (date, amount, etc.) should be mapped as Donation 1 fields.

Import Process

If you are already signed in to the database into which you want to import data, click **Settings** in the toolbar at the top of your screen. Then select the **Import Data** link beneath the **Importing, Exporting and Data Management** menu option. (Or select the **Import and export data** link beneath the **Database, Files, and Maintenance for FrontStream CRM 2013)**.

Then choose **Import a File.**
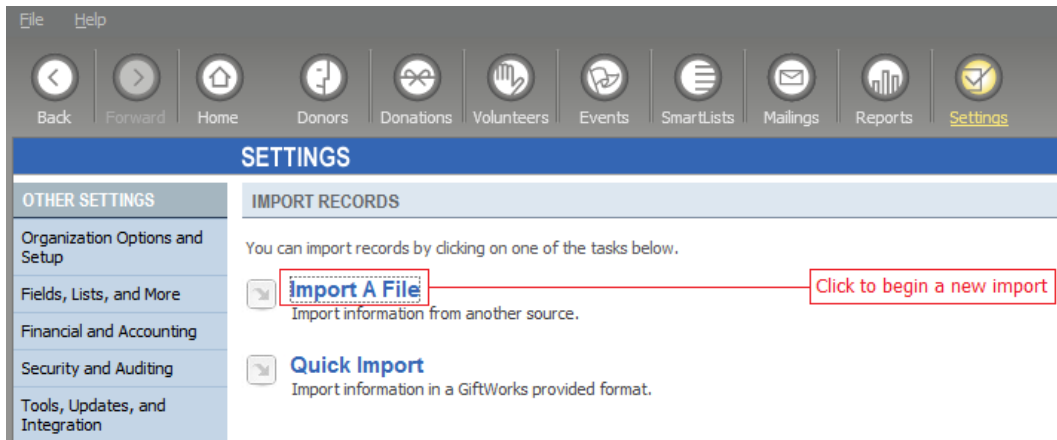
Choose the file type that matches your import file (.xls, .xlsx, .mdb, .accdb, .csv, or .txt) from the dropdown list, then click on **Find import file...** and browse to the location where your import file is saved.
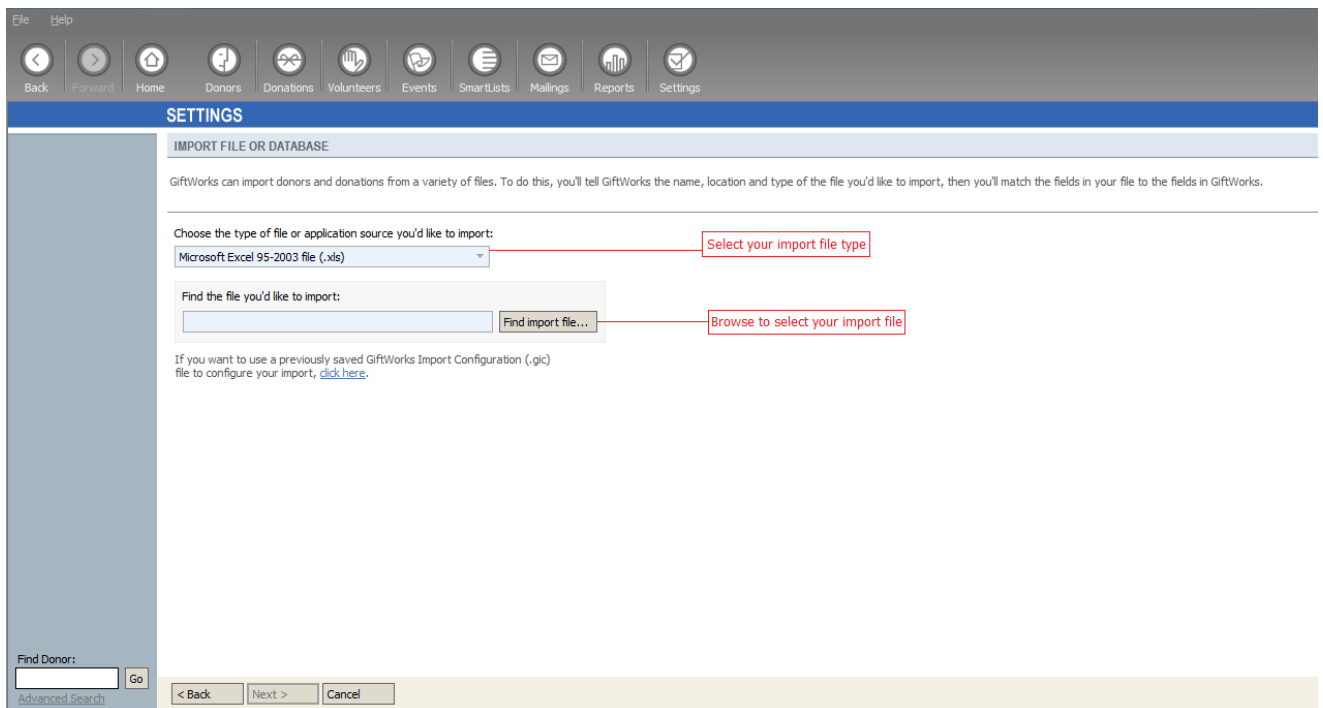
Once you have selected the file type and located the file you will import from, click **Next** to continue.

Note: Importing from Office 2007 or higher (.xlsx or .accdb) files may require you to download and install a driver from Microsoft's web site to enable FrontStream CRM to properly read the file. In this event, FrontStream CRM will provide information on-screen during the import process, including a link to the driver download site.

If you have previously mapped an Import and saved the import configuration (See **Save Import**, under **Mapping**, below) in a FrontStream CRM Import Configuration (.gic) file, you can retrieve the saved configuration by clicking the **click here** link, then click **Load** to find and open your .gic file. Click **Open** to load the saved configuration, then click **Next** to continue.
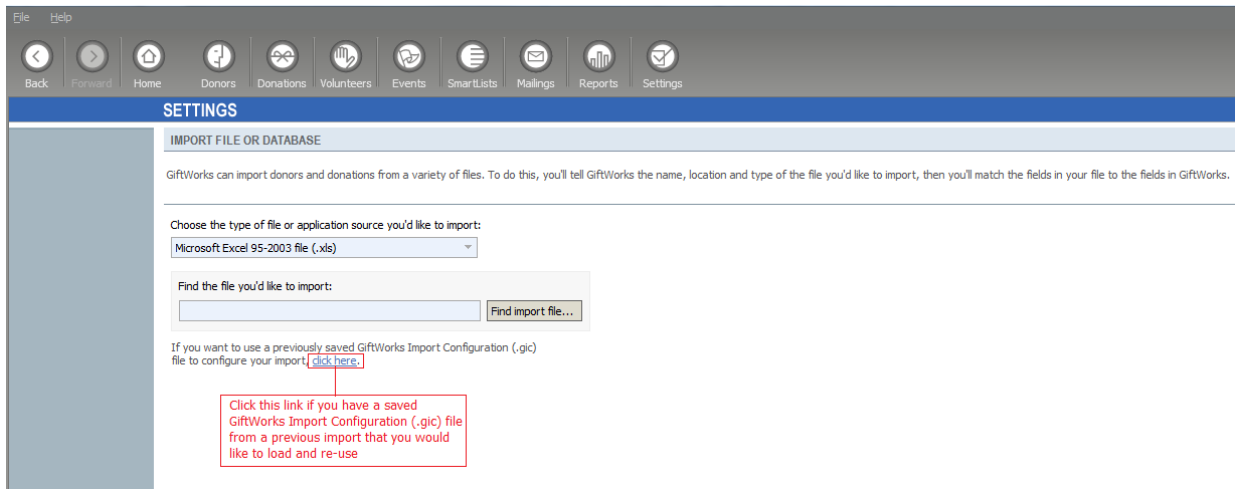
FrontStream CRM will display a preview of the data it found in the import file you selected **(up to the first 25 rows).** Follow the options below for the type of file you are importing.
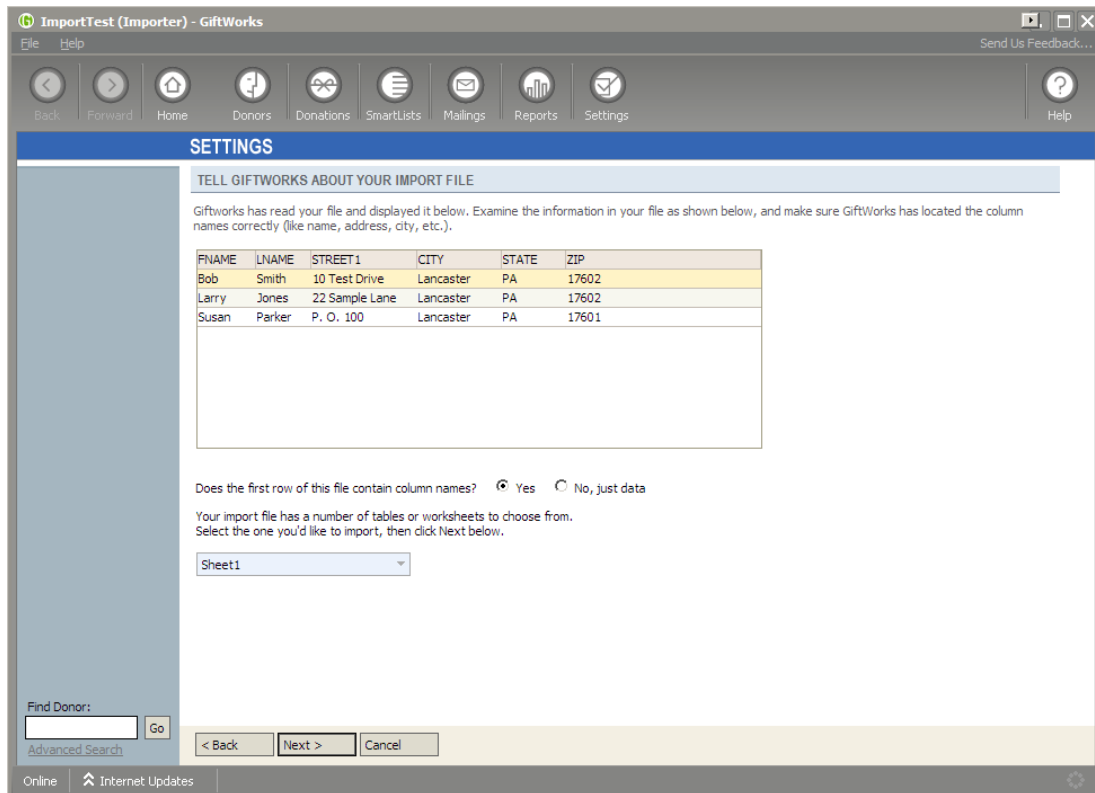
If you are importing from:

Microsoft Excel

- Indicate whether the first row of your worksheet contains field names. If not, it may be worth your time to go back and add them before performing your import. In the absence of field names, the fields will be called F1, F2, etc., which can make them difficult to tell apart.
- If your workbook contains more than one worksheet, select the one you want to import. If you want to import more than one worksheet, you'll need to perform multiple imports.
- Click **Next** to continue.

Delimited Text/CSV

- Indicate whether the first row of your file contains field names. If not, it may be worth your time to go back and add them before performing your import. In the absence of field names, the fields will be called F1, F2, etc., which can make them difficult to tell apart.
- If your columns do not seem to be correctly aligned, try changing the separator. Common separator choices (comma, tab, etc.) are provided, or you can enter the separator value in the box next to the selection marked **Other**.
- Click **Next** to continue.

Microsoft Access

- If your database contains multiple tables and queries, you must select the one you want to import. If you want to import more than one table or query, you'll need to perform multiple imports. Remember that a query can be used to join the data from multiple tables for importing in one pass, depending on how the data is configured.
- Click **Next** to continue.

Import Options

The next step allows you to select options that affect how your data gets imported into FrontStream CRM. The options are described below.

Creating Donors

The selected option here determines how FrontStream CRM will import rows from your source file that contain both individual names (i.e., "John Smith") and organization names (i.e., "Acme Corp.")

- **Create as a donor without a profile**. This option causes the donor to be created without a profile. This means that the display name, salutations and addressees will (if not mapped) be assigned using the individual's contact information. For example, the display name may be assigned as "Smith, John" and the salutation as "John Smith". The organization name is preserved but not used as part of the display name, addressee or salutations calculated by FrontStream CRM.
- **Create as a donor with an organizational profile**. This option causes the donor to be created with an organizational profile. This means that the display name, salutations and addressees will (if not mapped) be assigned using the organization's contact information. For example, the display name may be assigned as "Acme Corp." and the salutation as "Acme Corp. / Attn: John Smith".

Note that these options apply only if you do not include Profile as one of the mapped fields from your import file. Also, the selected rule applies to the entire imported file; if you want to have some rows treated differently than other rows, you should separate them into different import files and import them separately.

Creating Household Donors

You can import files that contain two names on the same row. This can be for married couples or for any pair of individuals that share the same address and should be treated as a single entity in FrontStream CRM. The first name is referred to as the "Donor" and the second name is referred to as "Spouse" during the import but the individuals do not have to be related or share the same last name. (**NOTE** – You <u>must</u> include Spouse Last Name in your import file in order to correctly create households, even if the spouse's last name is the same as the donor's.) Your options for handling rows with multiple names during the import are as follows:

- **Create a single household donor**. This option causes FrontStream CRM to create a donor with a household profile, which contains both names from the import file (for example, "Smith, John and Mary".) You can further refine the import with one of the following additional options:
    - **Create a household donor only**. This option is the default and creates only the household donor containing both names.
    - **Create a donor as an affiliate donor and relate to the household**. This option creates the household record with both names (i.e., "Smith, John and Mary") and also an affiliate donor with just the donor's name (i.e., "Smith, John".) This is useful if you wish to track donations and mailings to the household as a single entity but also wish to track group memberships and other information for just the individual donor (for example, if the donor is a board member.) FrontStream CRM creates relationships between these donors automatically during the import.
    - **Create a spouse as an affiliate donor and relate to the household**. This option creates the household record with both names (i.e., "Smith, John and Mary") and also an affiliate donor with just the spouse's name (i.e., "Smith, Mary".) This is useful if you wish to track donations and mailings to the household as a single entity but also wish to track group memberships and other information for just the individual spouse (for example, if the spouse is a board member.) FrontStream CRM creates relationships between these donors automatically during the import.
    - **Create both a donor and a spouse as an affiliate donor and relate to the household**. This option creates a total of three donors when two names are found during the import: the household containing both names, an affiliate containing only the donor's name, and an affiliate containing only the spouse's name. FrontStream CRM creates relationships between these donors automatically during the import.
- **Create a donor and an affiliate spouse and create a relationship between them.** This option does not create a household donor. Instead it creates two individual donors, with the spouse being an affiliate. A relationship is automatically created between the donors. This is useful if you wish to track information about the donor and spouse separately and will not need to track donations, mailings, etc., for the household as a single entity.

When the importer creates an affiliate, the following information is duplicated in both the affiliate and related household or donor: Member since and Renewal dates, Status, Source, Assigned To, Custom fields, Notes and Groups. Contact information such as addresses, phone numbers and emails are not replicated between the household and affiliate donors.

Matching Existing Donors

As each row of data from your source file is imported, FrontStream CRM must determine whether the data should be used to update an existing donor or to create a new donor. The following options allow you to control how FrontStream CRM searches for an existing donor:

- **Let FrontStream CRM decide**. This is the default option and should be used when your import source file does not contain a unique identifier (a.k.a. "key") for each donor. Selecting this option tells FrontStream CRM to use the following rules to search for matches using the mapped name fields:
  - o If your import file contains a field that is mapped to the FrontStream CRM **display name**, then FrontStream CRM will use this value to determine whether a donor already exists. The values must match exactly; a value of "John Smith" in the import source file will not match a donor with a display name of "Smith, John" in the FrontStream CRM database.
  - o If you do not map a field to the FrontStream CRM display name, then the match will be attempted using the combination of mapped name fields: **donor first name**, **donor last name**, **spouse first name**, **spouse last name**, and **organization name**. Again, the fields must match exactly; for example, "Rob" and "Robert" are not the same. Also note that if you are performing an import to update existing donors, you should map the same name fields and include the same values as in the original import. For example, if you import a file which contains both donor and spouse names and a household donor called "Smith, John and Mary" is created, then attempt a subsequent import where only the donor first and last names are mapped, the information for "Smith, John" in the second file will be considered a new donor and not update the "Smith, John and Mary" household donor from the first import.
- **Choose the fields to use for matching donors**. If your import source file contains a unique identifier or "key" for each donor, then matching is both easier and more accurate. The screen-shot on the next page illustrates these options:
  - o **Choose your import field**. The drop-down list here presents all of the fields from your import source file. You should select the field that contains the unique identifier.
  - o **Choose the FrontStream CRM field**. This drop-down list contains several built-in FrontStream CRM fields (including the FrontStream CRM donor ID) as well as the text or numeric donor custom fields that you have defined in your database.
    - If your import source file contains a unique identifier that was not assigned by FrontStream CRM, you can store that value in a FrontStream CRM donor custom field to be used for matching on subsequent imports. Refer to the FrontStream CRM help documentation for information on how to create donor custom fields.
    - If you import source file contains information that was previously exported from your FrontStream CRM database, including the FrontStream CRM donor ID, then you can use the FrontStream CRM donor ID for matching during the import.
      - **IMPORTANT** – You should not try to use an ID field assigned outside of FrontStream CRM to match to the FrontStream CRM

donor ID. The FrontStream CRM donor ID is assigned automatically when a donor is created and cannot be forced to a specific value. You should use a donor custom field for any ID not assigned by FrontStream CRM.

- o **If a matching donor is not found, FrontStream CRM should.** You can ignore rows from your import source file when a match is not found, or have FrontStream CRM automatically create a new donor. Keep in mind that if you wish to have FrontStream CRM create a new donor when a match is not found, you must map at least **display name** or **donor first / last name** or **organization name** or a new donor cannot be created. If you select the option to have FrontStream CRM create a new donor if a match is not found, and you do not map one or more of these name fields, you will receive a warning during the mapping phase and you will not be able to complete the import without either mapping the appropriate name fields or changing this option to ignore rows when a match is not found.
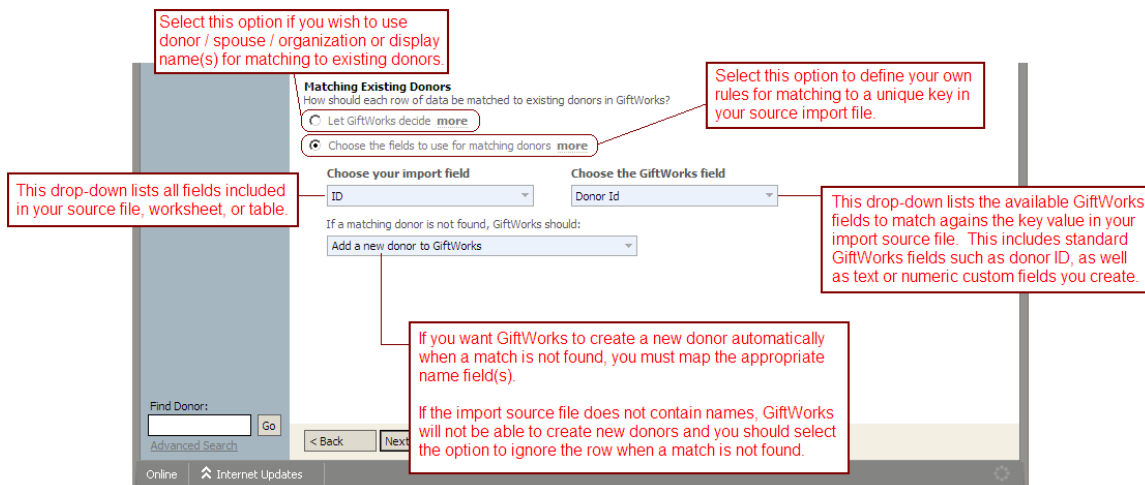
Donation Receipts

The FrontStream CRM importer works equally well for historical information and more recent data. Depending on the purpose of your import, you may want to produce receipts in FrontStream CRM based on the imported data. These options allow you to decide how FrontStream CRM handles receipting.

- **None of the donations should be receipted in FrontStream CRM**. This is the default option and is useful when you are importing historical information for which receipts have already been produced. You can import the receipt numbers and receipt dates with the donation information, but the donations will not be flagged for inclusion on future receipt mailings.
- **Allow donations to be receipted in FrontStream CRM based on donor defaults or mapped values**. This option allows you to import donations that will be receipted through FrontStream CRM after the import. The following rules apply when selecting this option:
  - o You can control individual imported donations by mapping fields from your import file to control whether the donation is to be receipted in FrontStream CRM or not, and which receipt group the donation should be assigned to for receipting.

- o If you do not specify a receipting option or receipt group for the donation during import, the default receipt settings for the donor will be used. For example, if the donor is defined in FrontStream CRM with a default receipt group of "Monthly Donations" that receipt group will be applied to the donor's imported donations unless overridden by mapped fields from the import source file.
- o If the donor does not already exist in FrontStream CRM (and therefore does not have receipting options set up) then the receipting options for the donor may be mapped to fields from the source import file (see mapping section later in this document.) If not mapped, the donor will be created with the receipting options set to issue receipts with the "Receipts" receipt group.

Donation Receipts
How do you want to handle receipting for any imported donations?

◉ None of the donations should be receipted in GiftWorks

○ Allow donations to be receipted in GiftWorks based on donor defaults or mapped values

Existing Memberships

If you are importing an **active** or **pending** membership and the donor has a membership with a **matching status**, how should FrontStream CRM import this membership?
- • **Do not import the membership**. This is the default option. Choose this option if you are not importing any membership information.
- • **Deactivate the existing matching membership and import the new membership**.
- • **Update the existing matching membership with the information from the importing membership**.

Associate Donations with a Membership.

If you are importing donations, you can associate them with an **active** or **pending** membership. How should FrontStream CRM choose the correct membership?
- • **Always associate the donations where needed, or with the membership that has an outstanding amount.**
  - o If both or neither have an outstanding amount, choose the active membership first, then pending
  - o If both or neither have an outstanding amount, choose the pending membership first, then active
    - ▪ **Always associate the donations with the active membership**
    - ▪ **Always associate the donations with the pending membership**

Existing Memberships
If you are importing an **active** or **pending** membership and the donor has a membership with a **matching status**, how should GiftWorks import this membership? Learn more
◉ Do not import the membership

○ Deactivate the existing matching membership and import the new membership

○ Update the existing matching membership with the information from the importing membership

Associate Donations with a Membership
If you are importing donations, you can associate them with an **active** or **pending** membership. How should GiftWorks choose the correct membership? Learn more
◉ Always associate the donations where needed, or with the membership that has an outstanding amount.
   [If both or neither have an outstanding amount, choose the active membership first, then ▾]

○ Always associate the donations with the active membership

○ Always associate the donations with the pending membership

Find Donor:
[   ] [Go]
Advanced Search

[< Back] [Next >] [Cancel]

FrontStream CRM 2015 is the **ONLY** version that allows you to import **memberships** into FrontStream CRM.

NOTE: Before importing this information into FrontStream CRM, you will need to go and setup the Membership Programs, Levels and Statuses.

Click here for detailed information on setting up your Membership Programs and Levels **BEFORE** importing.

Mapping

Importing data is similar to moving to a new house. You have to examine the layout of the old home and the new one, and determine what to do with your furniture. In the case of an import, your source file is the old home, FrontStream CRM is the new home, and your data is furniture. Some things will be easy to determine; the nightstands from the bedroom in the old house go into the bedroom in the new house, and the donor last name from the source file will be the same as the donor's last name in FrontStream CRM. However, sometimes the new home has more or fewer rooms than the old, or the rooms are different sizes and the furniture must be maneuvered or modified or even replaced. Likewise, you may find that some data from your source file will go into a FrontStream CRM field with a different name, or you may need to create one or more custom fields to store some data, or you may even decide that some data is no longer needed and should not be transferred at all.

On the mapping screen, you will need to indicate the FrontStream CRM field into which each of the fields in your import file should be imported. **Appendix A** of this guide contains a list of the FrontStream CRM fields into which you can import information, along with details about each field. **Appendix B** is a quick-reference guide you should print and keep handy when mapping.

As shown in the above example, if you have a "Company" field in your import file (under Your Import Fields), you would select Donor Name → Organization Name under FrontStream CRM Fields. You need to select a target (FrontStream CRM Field) for each of the fields you wish to import from your source file. If you do not need to import all of the fields in your file, map the ones you wish to import and then click **Ignore Remaining Fields**.

Based on the options you select, some fields may be required. For example, in order to create new donors, you must map either the display name or donor first / last name or organization name. If you are importing donations, you must map both a donation date and donation amount for each imported donation.

Copy

Each import field can only be mapped to one FrontStream CRM field, so if you need to import the same data into two FrontStream CRM fields, click **Copy** to create another copy of the import field. This essentially provides the same function of making a copy of a column in your import source file. For example, if your source file contains only a receipt date for donations and you want to map this as both the donation date and receipt date in FrontStream CRM, you can click the Copy icon next to the source field to create a second copy, then map the original as donation date and the copy as receipt date. You can create multiple copies of the same field, if needed.

You can also copy a field by clicking the **Modify Import Fields** button and selecting the Copy option from the dialog that appears.

When you create a copy, the icon next to the copy of the field is a red 'X'. If you created a copy in error or wish to remove the copied field, click the 'X' icon.

Your Import Fields

This is a list of fields that FrontStream CRM found in your import file. There is one row for each field (note the scroll bar on the far right of the screen if there are too many fields to fit on the screen at one time.) Copied fields (see above) or fields created with the **Modify Import Fields** button (see below) are also listed in this column.

Your Import Data

This column shows the data contained in a single row of your import source file. The first row is shown by default, and you can move forward and backward through the source file using the arrows toward the bottom of the screen, as noted in the screen-shot on the previous page. Copies of fields made with the Copy function (see above) will show the same data value as the fields they are copied from. Fields created using the **Modify Import Fields** button will show the specified default value or copied value for the created field (see below for more information on using the **Modify Import Fields** function.)

FrontStream CRM Fields

In this column, you choose the FrontStream CRM field into which the data from each of your source fields will be imported. Click the link in any row to bring up the list of target fields. The target fields are organized into categories:

- **Clear Selection** clears the currently selected FrontStream CRM field, allowing you to map a different FrontStream CRM field for the source field. Note that you do not have to clear the mapping before changing it; you can simply click the link and select a different FrontStream CRM field. Only one FrontStream CRM field can be mapped per source field.
- **Do Not Import** tells FrontStream CRM to ignore the import field. Data from that field in your source file will not be imported into FrontStream CRM.
- **Donor Name** provides a menu from which you can select FrontStream CRM name fields including donor first / last name, spouse first / last name, organization name, salutation and addressee, etc.
- **Donor Details** provides a menu from which you can select additional FrontStream CRM donor fields, including profile, donor source, donor category, and others.
- **Donor Address 1** is the Mailing Address and **Donor Address 2** is an Informational Address. Each of these provide a sub-menu from which you can select FrontStream CRM fields including address name, two lines for street address, city, state, etc.
    Premium
    Donor Address 1 is the Primary Address and Donor Address 2 is an Informational Address. If the address already exists and is a Seasonal Address, the address type will not be changed. Seasonal Addresses cannot be added through the importer.
- **Donor Phone/Email** provides a menu from which you can select the phone (home, work, mobile, etc.), email, and contact preference information.
- **Donor Notes** contains fields where you can import notes about your donors. You can import just the text of a note or also include a note title and date.
- **Donations** *n* **(1-15)** is where you will map the donation information for each of the donations in each row of your import file. These sub-menus include fields for donation date and amount, fund, campaign, appeal, and more.
- **Donation Custom Fields** allows you to select existing donation-level custom fields to import data into. You can also create new donation custom fields on the fly using this link.
- **Membership** allows you to import membership program/level, start date, expire date, inactive date, status, type, total dues, other dues paid and benefit data.
- **Groups** allows you to create, and import data into, new donor groups. If you map import data that matches existing groups in FrontStream CRM, the imported donors will be added to that existing group.
- **Custom Fields** allows you to select existing donor-level custom fields to import data into. You can also create new donor custom fields on the fly using this link.
- **Special Options** contains the Name Tool, which can split donor names that are contained in one field into their constituent parts (for example, "Mr. and Mrs. John B. Smith").

Modify Import Fields

Modify Import Fields gives you another option to copy an import field (see **Copy** above), and also allows you to create a new field. This is useful if there is data you want to import with the import file, but that is not contained in your file. When you add the field you must also specify the default value for that field. This value is applied to all rows in the source file.

Example: If you want to import all donors in this file into a donor group called "Jack's Friends," you could click **Create a new field…**, give the field a name (say, "Group") and a value of "Jack's Friends." When you click **OK**, the new field will appear at the bottom of the list of import fields. You can then map that field to Groups under FrontStream CRM fields.

Reset All Fields

Clicking **Reset All Fields** removes all of your mappings. Be careful! You can inadvertently undo a large amount of work by clicking this. You should use this function only if you want to start the mapping process over again. Remember that if you make a mistake mapping one field, you can simply click the link showing the FrontStream CRM field you selected and then select a different field instead, or click the link and choose **Clear Selection** to clear the mapping for only that field.

Ignore Remaining Fields

Each import field must be mapped or ignored. If you have fields in your source file that you do not wish to have imported into FrontStream CRM, you should map all the fields that you want imported and then click **Ignore Remaining Fields** to make the rest to be ignored. You can mark an individual field to be ignored by clicking the link in the FrontStream CRM Fields column and selecting the **Do Not Import** option.

Next

The **Next** button will not be enabled until you have accounted for all of the import fields, either by mapping them or indicating that they should be ignored. If you have done all of your mapping, but the **Next** button is still disabled, click **Ignore Remaining Fields**. You should then be able to continue.

Clicking the **Next** button is the way to continue with your import (see **Save Import** below).

Save Import

Clicking **Save Import** lets you save the configuration of your import (file and option selections as well as field mappings) to a FrontStream CRM import configuration (.gic) file. You should always save your configuration. Doing so allows you to easily return to this point of the process if you need to redo your import. Also, should you require support to investigate an import issue, we will often ask for both the source import file you were working with, and the .gic file containing your import configuration.

You can load a configuration file from the first step of the import process.

Note that saving your configuration does not import the data into FrontStream CRM (see Next above). It only stores your settings for reference or later use.

Also note that certain types of mapping information cannot be saved in a configuration file. If you use these options, you can still save your configuration, but you will need to redo mapping of these types of fields:

- Donor custom fields
- Donation custom fields
- Donor groups

- Payment types
- Name tool

Special Options on the Mapping Screen

When you are mapping the fields from your import file to the fields in FrontStream CRM, most of the fields are simple matches: you indicate that data from the First Name field in your import file should be placed in the First Name field in FrontStream CRM, and so on.

For some types of fields, there are special options. These are Custom Fields, Groups and the Name Tool.

Creating Custom Fields

If you have existing donor or donation Custom Fields in your database, you can map to them just like you map to any other field. You can also create new FrontStream CRM custom fields on the fly during the import process, in the event that you find a field in your source file that should be stored in a custom field that does not already exist in FrontStream CRM.

There are several types of custom fields available in FrontStream CRM and the number of fields of each type you can create depends on whether you are using the Standard or Premium version of FrontStream CRM:

Custom Field Type	FrontStream CRM Standard (28 donor / 28 donation custom fields available)	FrontStream CRM Premium (75 donor / 75 donation custom fields available)
List Drop-Down	8 donor / 8 donation	20 donor / 20 donation
Dates	4 donor / 4 donation	10 donor / 10 donation
Numbers	5 donor / 5 donation	10 donor / 10 donation
Currency	5 donor / 5 donation	10 donor / 10 donation
Other (Text, Text Drop-Down, Checkbox)	6 donor / 6 donation	25 donor / 25 donation

Note - It is important to be sure you map well and use custom fields only as necessary. Adding people to groups or custom fields may ultimately make it harder for you to manage your data well. Before creating custom fields, spend some time to verify that no existing FrontStream CRM field fits the purpose of the data you are importing.

Mapping and Creating a Custom Field in One Step

1. On the mapping screen, click the link in the **FrontStream CRM Fields** column next to the **Import Field** you are going to map to a custom field.
2. Next, move your mouse pointer over **Custom Fields** (for donor custom fields) or **Donation Custom Fields**, and click **Add New Custom Field**.
3. Choose the type of the custom field you want to create.
4. Provide a name and description for the field. The name is what appears next to the custom field when you are viewing or editing a donor. The description is for your reference. When you complete the import, the data from your import field will be placed in the newly created custom field.

Creating Groups

In FrontStream CRM, you can create any number of donor groups, and each donor can belong to any number of groups. Groups are an easy way to segment donors based on their relationship to your organization (i.e., board members, members) or other factors. **During an import, you can create new groups in FrontStream CRM, and add donors to existing groups.** You cannot use the importer to remove donors from a group.

> **NOTE** – Groups are very flexible and useful in FrontStream CRM; you can use them in the creation of SmartLists or to launch Mailings, etc. Bear in mind, however, that the more groups you create the more time you will spend in maintaining them. You should not create groups for which there are other, more suitable FrontStream CRM fields or functions. For example, there is no need to create a group to track people who have elected not to receive mailings; instead, use the Mail Preference field. As another example, you can use FrontStream CRM reports and / or SmartLists to determine who your top donors are at any time, based on their giving history, so there is no need to maintain a group called "Top Donors". Before creating groups, spend some time verifying that there is not already a FrontStream CRM field or function more suited to the purpose of the group you are thinking of importing.

Mapping to Donor Groups

1. On the mapping screen, click **Click here to assign a field** next to the import field you want to import as a donor group.
2. Move your mouse pointer over **Groups** and then click on **Create New Group** – **Even if you are importing into an EXISTING Group, you will choose to Create New Group**

When creating a group, there are two options:

- **Create group using the column name**. This option uses the column (field) name from your source import file as the name of the group you are creating in FrontStream CRM. The data in the field for each row defines whether the donor is to be added to the group or not. If the data in the field is "Yes" or "True" or "1" or "-1" or "X" then the donor will be added to the group. If the data in the field is "No" or "False" or "0" or blank, then the donor will not be added to the group. Remember that donors cannot be remove from groups using the importer, so if a donor is already a member of a group in FrontStream CRM then they will remain in the group after the import even if the value in the import file is "0" or blank, etc. See *Example 1* in the diagram below for more information.
- **Create group using information in the column**. This option uses the data in the source field as the name of the group. **Note that each field must contain only one group name,** so if you want to add donors to multiple groups then you must have multiple columns in your source file, each mapped to create a group in FrontStream CRM. For example, if your source file contains a field called 'Group' and the data in the field is "Board; Volunteer", FrontStream CRM will create one group named "Board; Volunteer" – it will not split the field into two groups named "Board" and "Volunteer". See *Example 2* in the diagram below for more information.

Donors are either in a group or not. They cannot be in a group multiple times. If a donor is already in a group and the import contains data that would add the donor to the same group (or if the import file contains multiple rows for the same donor and group) then FrontStream CRM

just verifies that the donor is in the group and does not add them again. The importer also does not remove donors from groups.

EXAMPLE 1:

Using the option to create groups using the field name as the group name, groups will be created in GiftWorks called "Board", "Volunteer", and "Member"

FNAME	LNAME	BOARD	VOLUNTEER	MEMBER
John	Smith	Yes	X	-1
Larry	Jones	No	X	0
Susan	Parker	Yes		0

John Smith will be added to all 3 groups.

Larry Jones will be added to the "Volunteer" group.

Susan Parker will be added to the "Board" group.

EXAMPLE 2:

Using the option to create groups in GiftWorks using the data within the fields, the individual values from the 'Group1' or 'Group2' columns (both mapped in the same way) will be used to determine which group to create and add donors into in GiftWorks.

FNAME	LNAME	GROUP1	GROUP2
John	Smith	Board	Volunteer
Larry	Jones	Volunteer	
Susan	Parker		Board

John Smith will be added to the "Board" and "Volunteer" groups.

Larry Jones will be added to the "Volunteer" group.

Susan Parker will be added to the "Board" group.

Using the Name Tool

For situations where you have one field in your source file that contains the entire name of each donor (i.e., "Mr. John C. Smith, Esq."), or couple / household (i.e., "Mr. and Mrs. John and Mary Smith"), the FrontStream CRM importer includes a **Name Tool** that can split those complete names into separate fields for importing into FrontStream CRM.

1. On the mapping screen, click the link in the **FrontStream CRM Fields** column next to the import field you want to import using the tool.
2. Move your mouse pointer over **Special Options** and click on **Name Tool**.
3. The Name Tool asks you to select the approximate format of the names in the field you're importing, and gives you a preview of how it will separate that field. You can use the right and left arrows on the right side of the window to navigate through rows in your import file.
4. When you are satisfied that the Name Tool is separating your names properly, click **Next**.
5. You must now choose which of the separated name fields you want FrontStream CRM to import. You can choose to include all name components, or exclude components such as prefix, etc. You must include the minimum fields FrontStream CRM needs to create a new donor.

NOTE – The settings for the name tool are applied to all rows from your source import file. Therefore, your source file must have all names formatted the same way. For example, the name tool will not accurately separate names if some of your rows are formatted like "Smith, John and Mary" and other rows are formatted like "John and Mary Smith".

The links in the FrontStream CRM Fields column are blue for unmapped fields, green for mapped fields, and gray for ignored fields. When you have finished mapping your fields, the screen will look something like the following.
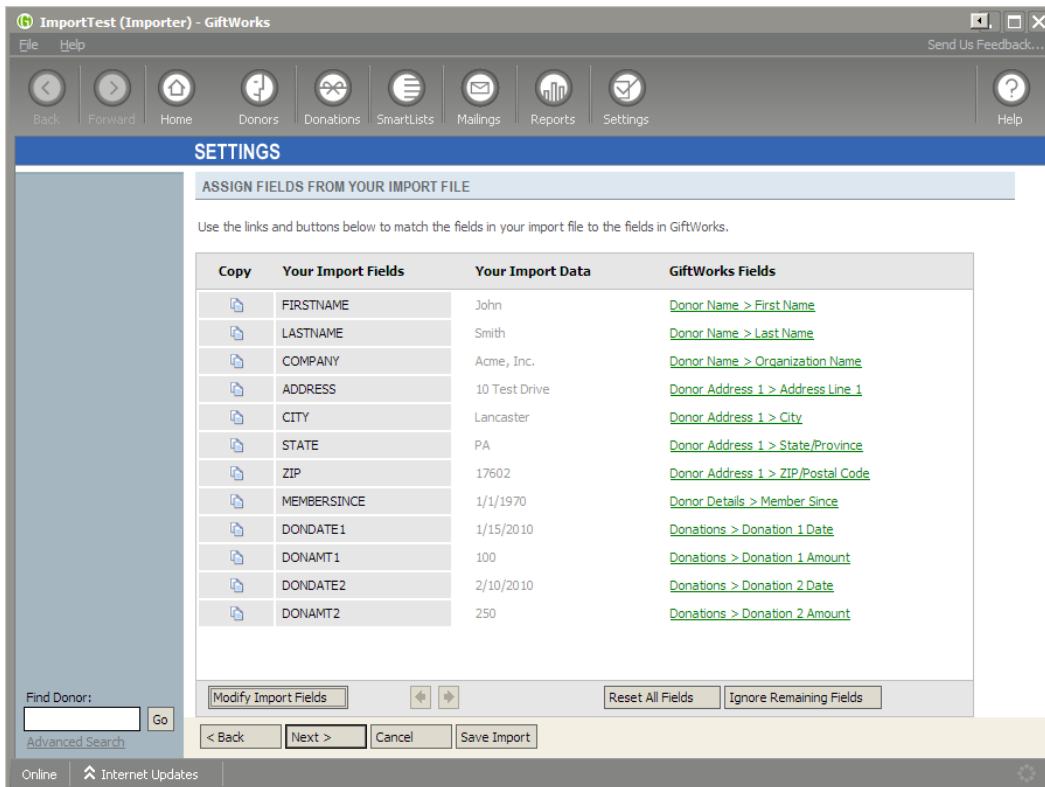
When you are satisfied with your mappings, click **Next**.

FrontStream CRM will examine your mapping selections. If FrontStream CRM detects problems that will prevent your file from being imported, they will be displayed under Errors. If FrontStream CRM detects problems that will not prevent your file from being imported, but may cause problems with your imported data, they will be displayed under Warnings. For example:

To correct any Errors or Warnings, click **Back** and return to the mapping screen. If there are no errors or warnings then your mapping is complete, as in this example:

Errors
There were no mapping errors found.

Warnings
There were no mapping warnings found.

Click Next to continue.
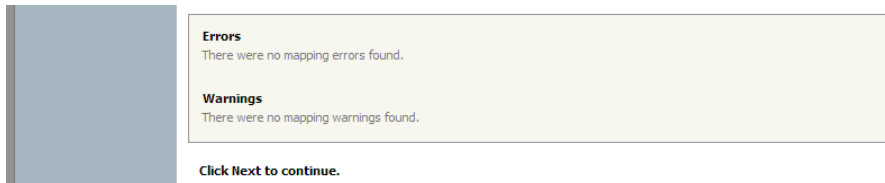
Once you have resolved all errors and warnings, click **Next** to continue to the test import phase.

When you click **Test Import** on this screen, FrontStream CRM reads and examines each row of your import file as if it were importing the data. Information from your import source file is displayed, along with any errors or warnings.

> **NOTE** – No changes are made to the FrontStream CRM database during the test phase.
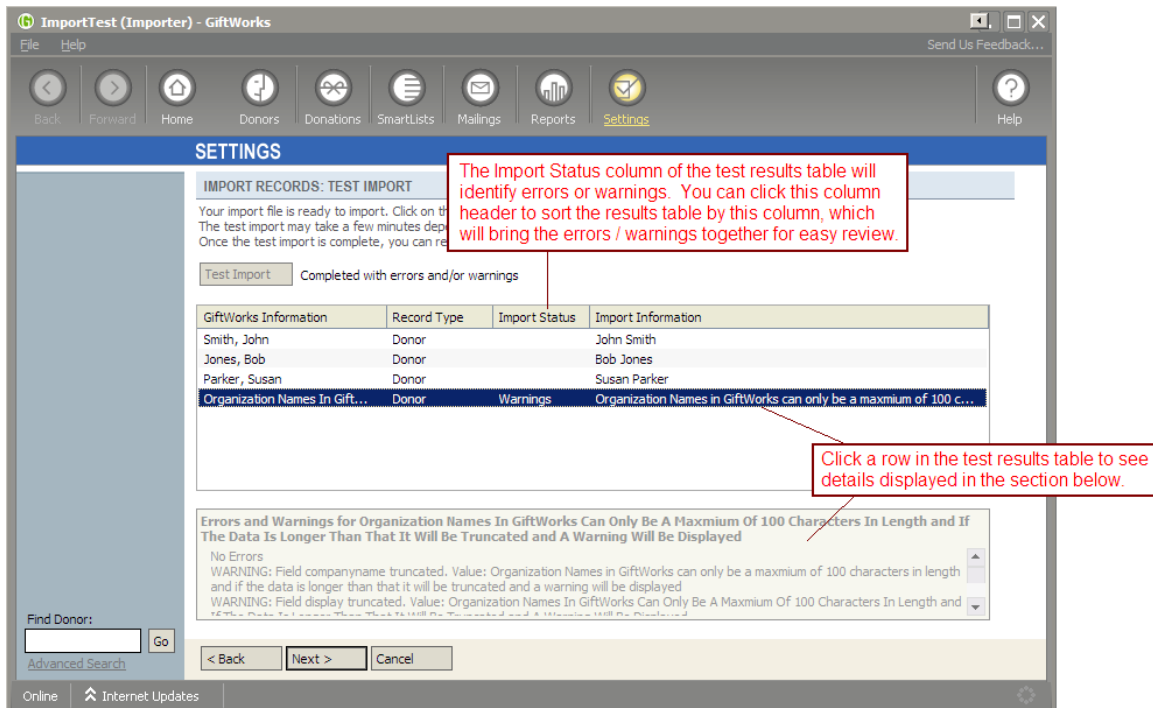
If the Import Status column indicates errors or warnings, click on that row to see details of the problem at the bottom. If you have errors or warnings, you may want to go back and make modifications to your mapping or your import file before proceeding.

If the test completes without any errors or warnings, click **Next** to continue to the import phase.

When you are ready to perform your import, click the **Complete Import** button. FrontStream CRM will read and import each row from your source file into FrontStream CRM. If any errors or warnings are detected, they will be displayed on the results table as discussed above for the test phase. In addition, an Import Summary is displayed showing the total number of donors and donations that have been added and/or updated.

Once the import completes, click **Done** to continue using FrontStream CRM and begin verifying and working with your imported data.
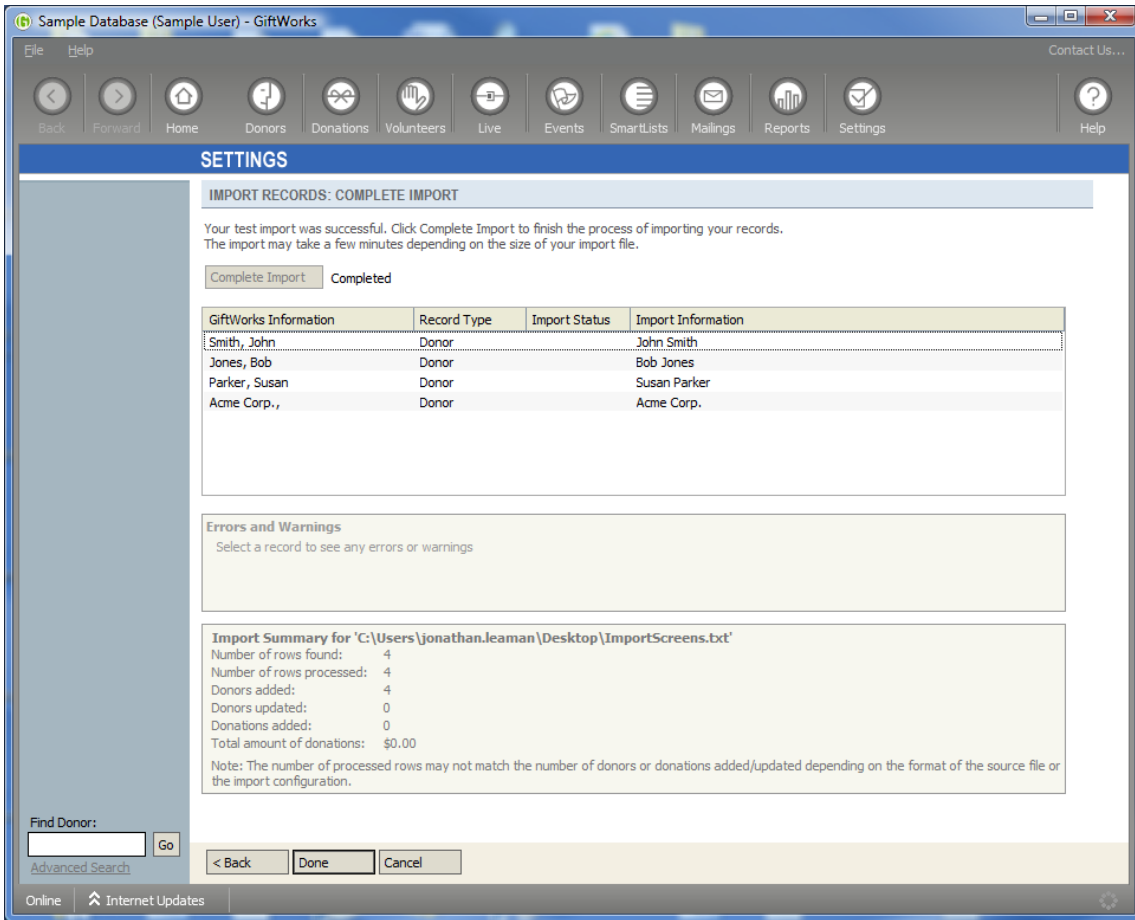
Note: We recommend doing a backup of your newly imported database immediately.

Importing Donation Data

There are two ways to format your donation data for import. The simplest includes only one donation per row, with all donation fields on the row used to describe and populate a single donation in FrontStream CRM. Each row must include, at a minimum, the donation date and amount, as well as whatever fields are required to determine the donor to whom the donation belongs (such as the donor name or key field for matching as described earlier in this document.) For example:

These columns are used to define which donor the donation belongs to.

These columns are mapped to:
Donation **1** Date, Donation **1** Amount, Donation **1** Campaign, Donation **1** Appeal

FNAME	LNAME	DONDATE	AMOUNT	CAMPAIGN	APPEAL
John	Smith	1/1/2010	$100.00	Winter 2010	Winter Mailing
John	Smith	1/15/2010	$50.00	Winter 2010	Winter Mailing
John	Smith	12/15/2010	$100.00	Winter 2010	Secret Santa Event
Bob	Jones	1/15/2010	$75.00	Winter 2010	Winter Mailing
Bob	Jones	5/10/2010	$75.00	Spring 2011	Spring Fling Event

Each row in this file contains one donation.

The second way to format your donation information will be to have multiple donations on each row in your source file. All donations on the same row will belong to the same donor, and each row must include whatever fields are required to identify the donor (such as the donor name or key field for matching as described earlier in this document.) For each donation on the row, you must include, at minimum, the donation date and amount. For example:

These columns are used to define which donor the donation belongs to.

These columns are mapped to:
Donation **1** Date, Donation **1** Amount, Donation **1** Campaign, Donation **1** Appeal

FNAME	LNAME	DONDATE1	AMOUNT1	CAMPAIGN1	APPEAL1	DONDATE2	AMOUNT2	CAMPAIGN2	APPEAL2
John	Smith	1/1/2010	$100.00	Winter 2010	Winter Mailing	1/15/2010	$50.00	Winter 2010	Winter Mailing
Bob	Jones	1/15/2010	$75.00	Winter 2010	Winter Mailing	5/10/2010	$75.00	Spring 2011	Spring Fling Event
Susan	Parker	12/15/2010	$125.00	Winter 2010	Secret Santa Event				

Each row in this file contains multiple donations for the same donor.

These columns are mapped to:
Donation **2** Date, Donation **2** Amount, Donation **2** Campaign, Donation **2** Appeal

You can import a maximum of 15 donations per row from your source file. If your file includes more than 15 donations per row, you will need to make multiple passes through the importer, as described previously in this document.

Include as much information as possible for each gift during the import to minimize manual edits afterward and to provide your development office with the detail necessary to analyze giving and to plan for future fundraising. It might be possible to add campaign, fund and appeal to your data, or edit those values for consistency prior to import.
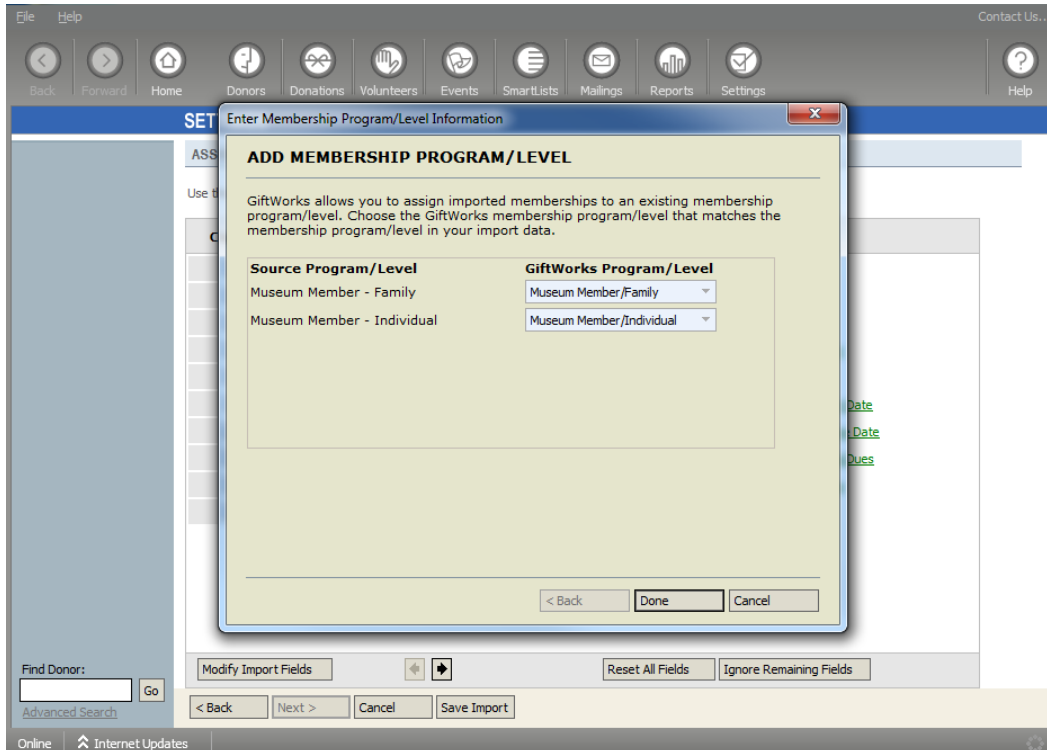
NOTE: If you are importing the same excel file multiple times to import donations, and the excel file contains contact information fields (Address, Phone, Email) you will **NOT** want to import those fields with each import pass. (Unless you have the Address Name, Phone Name, Email Name fields on the excel file). If you do not have the name fields on the excel file, you will end up with multiple listings for each address etc. You will want to **ignore those columns** for each import after the initial import pass. **Refer to the Donor Address 1: Mailing Address area in the Appendix A section below for more details on Address Name.**

Importing Membership Data

There are two fields which must be mapped - **Membership Program and Level** and
Membership Status. When mapping these fields, you will be prompted to match the values
that are being imported from your spreadsheet with the values that are configured in
FrontStream CRM.

Click here for more information on Importing Memberships.

Mapping the Program and Level

Mapping the Membership Status

Quick Import

The FrontStream CRM Quick Import feature allows you to import donations for new or existing donors. FrontStream CRM can apply a donation to an existing pledge payment if the amount matches an outstanding pledge payment for the assigned donor. FrontStream CRM will use its best judgment to determine if it is a new donation or a payment on an outstanding pledge. During the import process you will have the option to override the defaults for each donation. The Quick Import must use a Microsoft Excel (.xls or .xlsx) spreadsheet with a pre-defined set of columns. **Download the QuickImport templates [here](#).**

In order to import donations using Quick Import, **the following columns are required to have values:**

- **Id**
- **FirstName**
- **LastName**
- **PaymentMethod**
- **DonationDate**
- **DonationAmount**

If you are not using one or more of the pre-defined template columns, please do not remove them. The columns are still required although some of them may not have any values. The following columns are available for Quick Import:

- **Id -** this is a unique identifier per donation/payment and is imported as the Transaction Id
- **FirstName -** first name of the donor
- **LastName -** last name of the donor
- **Salutation -** prefix of the donor
- **Company -** company name of the donor
- **Street -** street of the donor address
- **City -** city of the donor address
- **State -** state of the donor address
- **Zip -** zip/postal code of the donor address
- **Country -** country of the donor address
- **Email -** this is the donor's email address
- **Phone -** this is the donor's phone number
- **AddToMailingList-** indicates if the donor should be added to the mailing list selected on the Quick Import options screen, recognized values are y,yes,n,no,1,-1,0,t,true,f,false and are not case-sensitive
- **BillStreet -** street of the payment billing address
- **BillCity -** city of the payment billing address
- **BillState -** state of the payment billing address
- **BillZip -** zip/postal code of the payment billing address
- **DonationDate -** this is the date of the donation
- **DonationAmount -** this is the amount of the donation. Zero-dollar donations will only be imported if you have allowed zero-dollar donations in your Organization Info
- **Restriction -** this is to what the donation should be directed
- **Anonymous -** indicates if the donation should be marked as anonymous, recognized values are y,yes,n,no,1,-1,0,t,true,f,false and are not case-sensitive
- **PaymentMethod -** this is the payment method of the donation. Examples are Cash, Check, Credit Card, Equipment, etc.

- **PaymentType** - credit card type if the PaymentMethod is "credit card"
- **AccountNumber** – credit card number. Only the last 4 digits will be saved
- **PaymentName** - name on the credit card
- **Notes** – these are donation notes and will be saved as the donation description
- **CheckNumber** - check number of the donation
- **CheckDate** - check date of the donation

To start this process, go to **Settings**. Click on the **Import data** link under the **Importing, Exporting, and Data Management** area. (**Database, Files and Maintenance** in **GiftWorks 2013)**.

Choose the **Quick Import** option
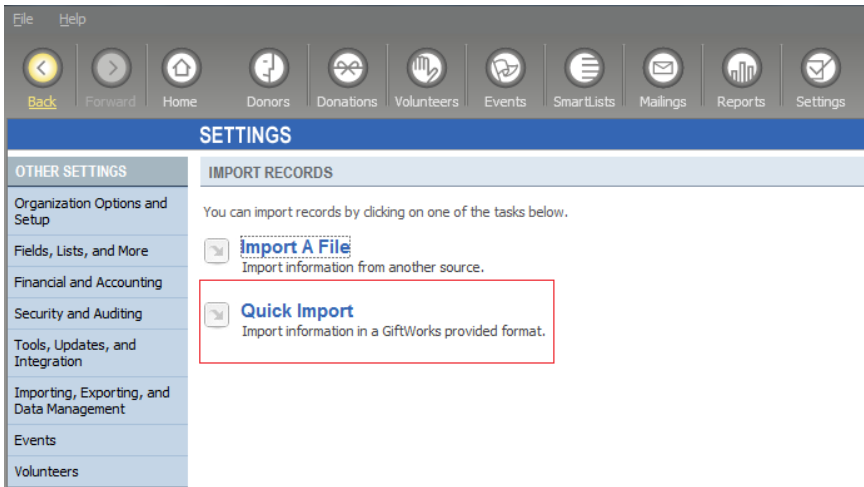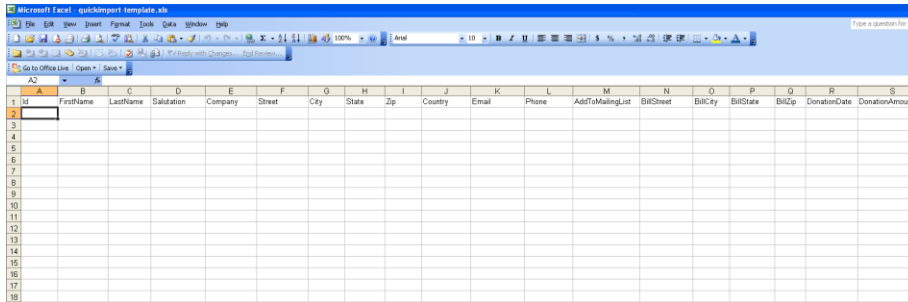
This next screen will provide you with a link to download the Quick Import template. You can choose to download it as .xls or .xlsx.
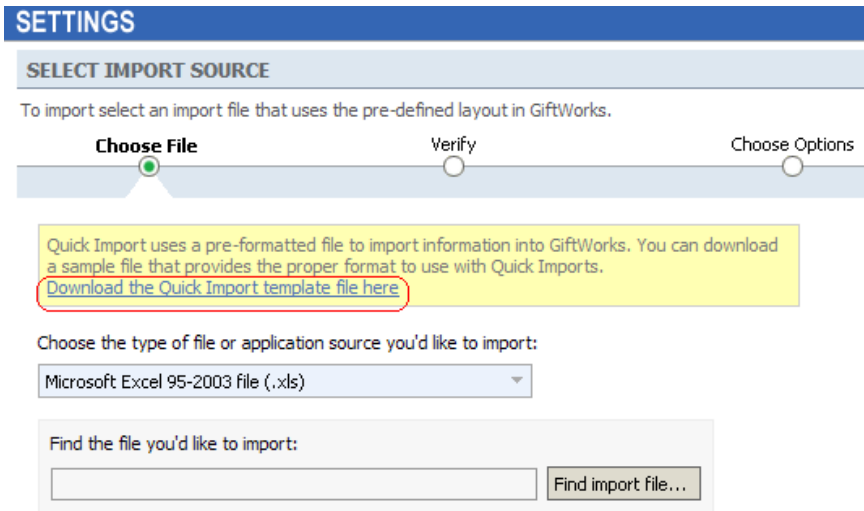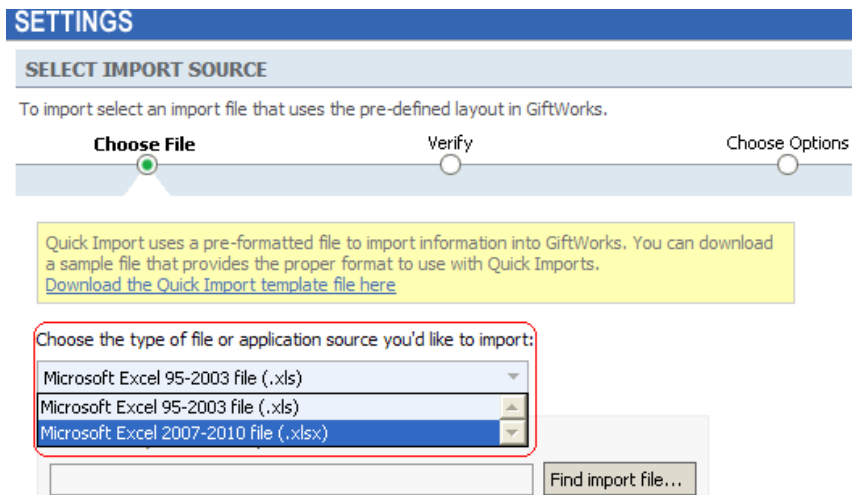
Save this template to your computer and then enter in your data. Save your changes when finished. ***NOTE: do not alter the names of the columns or remove any columns from**

the template. Also keep in mind that the Id, **FirstName, LastName, PaymentMethod, DonationDate** and **DonationAmount** are **required**.

Now you are ready to start the Quick Import process.
Choose the type of file you would like to import.

You can then click on the Find import file button and search for the template you wish to import.

Click on the file and then click Open.
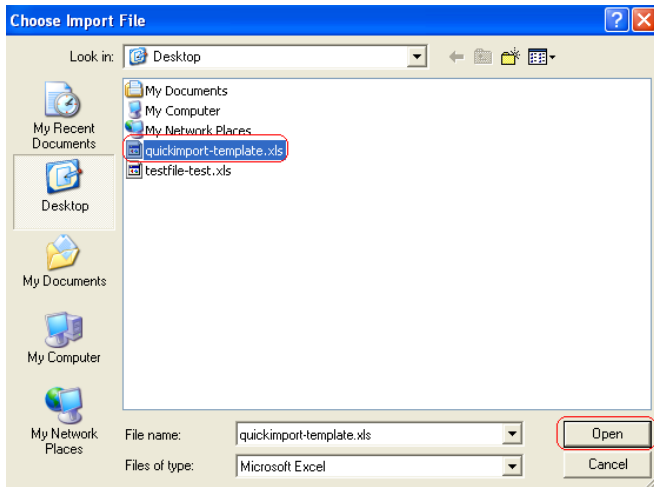
If you have created multiple worksheets you can choose the worksheet you would like to import.

Click Next to continue to the **Verify** screen. Here you can choose the **Matching** and **Match Payment** options.

Click the Automatic link in the Matching column to choose the options for matching donors. You can choose to Let FrontStream CRM Decide, Select an Existing Donor or Always Add a New Donor.

The Match Payment column will show different options based on whether or not the donor has an existing pledge in your database or not. If there are no existing pledges, you will see New Donation in this column. The only option you will have to choose here would be to Always Add Donation.

If there is an existing pledge for a donor, you will see the date of the next payment listed in this column.

If you click on that link, you will then see additional options. You can choose to Always Add Donation or the Pledge to which you want to apply the payment. (Note: if that donor has more than one pledge you will see each pledge listed here).

Click Next to continue to the **Choose Options** screen.

Here you will choose the Fund (this is required), Campaign and Appeal. You can also choose the Receipts and Acknowledgement options as well as Mailing List options.

Click Next to continue to the **Import** screen.

Verify that the data is correct. You can click Back at the bottom of the screen to go back to change any options on the previous screens.

When you are ready to import, click on the Import button.

When the process is complete you will see the following screen.

Click Next to continue to the Finish screen. Here you will see an Import Summary. Click the Finish button when done reviewing this screen.

APPENDIX A - Importable Fields

This appendix lists all of the FrontStream CRM fields that you can map to fields from your source import file, and describes the use and limitations of each. **Appendix B** of this document distills this information into a one-page quick-reference to print and use as a reminder when mapping.

Donor Name

The following FrontStream CRM fields are included in the **Donor Name** sub-menu on the mapping screen:

- **Display Name** – Text, up to 110 characters. FrontStream CRM will calculate the value for this field when creating new donors if it is not mapped. For donors with an organizational profile, this value is the company name. For other donors, this value combines the first and last name components in the format specified in FrontStream CRM settings (for example, "Smith, John and Mary" or "John and Mary Smith".)
- **Organization Name** – Text, up to 100 characters.
- **Name Prefix** (Mr., Mrs., etc.) – Text, up to 50 characters.
- **First Name** – Text, up to 50 characters.
- **Middle Name** – Text, up to 50 characters.
- **Last Name** – Text, up to 50 characters.
- **Name Suffix** (Jr., Sr., etc.) – Text, up to 50 characters.
- **Salutation – Formal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating donors if it is not mapped. For example, "Mr. and Mrs. Smith".
- **Salutation – Informal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating donors if it is not mapped. For example, "John and Mary".
- **Addressee – Formal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating donors if it is not mapped. For example, "Mr. and Mrs. John Smith".
- **Addressee – Informal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating donors if it is not mapped. For example, "John and Mary Smith".
- **Nickname** – Text, up to 50 characters.
- **Gender** – Text, up to 50 characters.

- **Spouse Name Prefix** (Mr., Mrs., etc.) – Text, up to 50 characters.
- **Spouse First Name** – Text, up to 50 characters.
- **Spouse Middle Name** – Text, up to 50 characters.
- **Spouse Last Name** – Text, up to 50 characters.
- **Spouse Name Suffix** (Jr., Sr., etc.) – Text, up to 50 characters.
- **Spouse Salutation – Formal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating affiliate donors if it is not mapped.

- **Spouse Salutation – Informal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating affiliate donors if it is not mapped.
- **Spouse Addressee – Formal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating affiliate donors if it is not mapped.
- **Spouse Addressee – Informal** – Text, up to 255 characters. FrontStream CRM will calculate the value for this field when creating affiliate donors if it is not mapped.

Donor Details

The following FrontStream CRM fields are included in the **Donor Details** sub-menu on the mapping screen:

- **Profile** – Fixed values. If this field is imported, the value must be "Donor" or "Household" or "Organization". If not mapped or left blank, the import options described earlier in this document are used to determine which profile to create. Invalid values in this import field will cause the row to be ignored during import.
- **Affiliate** – Fixed values. If this field is imported, the value must be "Donor" or "Affiliate". If not mapped or left blank, the import options described earlier in this document are used to determine whether to create the donor as an affiliate. Invalid values in this import field will cause the row to be ignored during import.
- **Create Date** – Date. If not mapped or left blank, the current system date is used for donors created by the import.
- **Website** – Text, up to 255 characters.
- **Contact Type** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Assigned To** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Donor Source** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Donor Category** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Status** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Member Since** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)
- **Renewal Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)
- **Issue Receipts?** – True or False (or "Yes", "Y", "No", "N"). Specifies whether the created donor wishes to receive receipts. If not mapped or left blank, the donor is created with receipting option set to issue receipts.
- **Receipt Group** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import. If not mapped or left blank, donors created by the import are assigned to the "Receipts" receipt group.

- **Description** – Text, up to 50 characters.
- **Job Title** – Text, up to 100 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. **NOTE** – *For this field, values that are not already in the list in Settings are imported for the donor but are not added to the list in Settings.*
- **Profession** – Text, up to 100 characters.
- **Department** – Text, up to 100 characters.
- **Assistant** – Text, up to 100 characters.
- **Manager Name** – Text, up to 100 characters.

Donor Address 1: Mailing Address

FrontStream CRM can import up to 2 addresses per row from the source file. The one mapped as **Donor Address 1** will become the donor's primary mailing address during the import. Therefore, if you are importing multiple addresses per donor on different rows in the import source file, you should sort the source file so that the address you want to be the donor's primary mailing address is the last row imported for that donor.

- **Address Name** – Text, up to 50 characters. This field can be used to provide a description for the address (for example, "Home Address", "Business Address", etc.) If not mapped or blank, FrontStream CRM assigns a default value of "Address 1".

    NOTE – You can use this field to cause an address to be replaced in FrontStream CRM. For example, if you import an address with a mapped address name of "Home Address" and there is already an address with that name for the donor, it will be replaced with the new address information from the import file. **If the address name is blank or not mapped, the address information will always be added as a new address for the donor, even if the donor already has an address with the same street, city, state, zip, etc.**

    Click here to learn more about UPDATING Addresses through importing.

- **Address Line 1** – Text, up to 100 characters. This is the first line of the address, for example "10 Test Drive."
- **Address Line 2** – Text, up to 100 characters. This is the second line of the address, for example "P. O. Box 100" or "Suite 100."
- **City** – Text, up to 50 characters.
- **State/Province** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **ZIP/Postal Code** – Text, up to 50 characters.
- **Delivery Point** – FrontStream CRM **Premium** only – Text, up to 50 characters. The USPS assigns every address a two digit code that is used for USPS discounted mailings. The Delivery Point for each address is returned by the CASS-certified ZIP+4 or delivery point code address matching process.
- **Country** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.

- **Latitude** – Numbers only. May include decimal points. Negative values are allowed. Non-numeric values are ignored by the importer. This is the latitude coordinate of the address which is used for mapping functionality within FrontStream CRM.
- **Longitude** – Numbers only. May include decimal points. Negative values are allowed. Non-numeric values are ignored by the importer. This is the longitude coordinate of the address which is used for mapping functionality within FrontStream CRM.

Donor Address 2: Informational Address

If a second address is included on the same row of the import source file, it can be imported as an informational address. All of the same fields as described above are available for mapping. Addresses mapped as **Donor Address 2** do not become the donor's primary mailing address.

If you have three or more addresses per row, you must import those using additional passes through the importer, mapping different sets of fields to either address 1 or 2 on each pass.

Donor Phone/Email

Donors in FrontStream CRM can have any number of phone numbers or email addresses, though only one of each is the primary contact information at any given time. The importable fields listed under **Donor Phone/Email** are as follows:

- **Home Phone Name** – Text, up to 50 characters. This field can be used to provide a description to go with the phone number mapped in the **Home Phone** field (below). You can provide a different description; for example, if your source file contains the value "Spouse Cell Phone" in this field then this will override the default "Home Phone" value and the phone number in the **Home Phone** field will appear in FrontStream CRM as "Spouse Cell Phone" instead of "Home Phone".

  > **NOTE** – You can use this field to cause a phone number to be replaced in FrontStream CRM. For example, if you import a phone number with a mapped phone name of "Home Phone" and there is already a phone number with that name for the donor, it will be replaced with the new phone number information from the import file. **If the phone name is blank or not mapped, the phone number information will always be added as a new phone number for the donor, even if the donor already has the same phone number.**

  > **Click [here](#) to learn more about UPDATING Phone Numbers through importing.**

- **Home Phone** – Text, up to 50 characters. If the **Home Phone Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Home Phone Name** is blank or not mapped then this phone number will be imported as "Home Phone".
- **Mobile Phone Name** – Text, up to 50 characters. Refer to the description of the Home Phone Name field (above) for more information.
- **Mobile Phone** – Text, up to 50 characters. If the **Mobile Phone Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Mobile Phone Name** is blank or not mapped then this phone number will be imported as "Mobile Phone".

- **Business Phone Name** – Text, up to 50 characters. Refer to the description of the Home Phone Name field (above) for more information.

- **Business Phone** – Text, up to 50 characters. If the **Business Phone Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Business Phone Name** is blank or not mapped then this phone number will be imported as "Business Phone".

- **Other Phone Name** – Text, up to 50 characters. Refer to the description of the Home Phone Name field (above) for more information.

- **Other Phone** – Text, up to 50 characters. If the **Other Phone Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Other Phone Name** is blank or not mapped then this phone number will be imported as "Other Phone".

- **Fax Number 1 Name** – Text, up to 50 characters. Refer to the description of the Home Phone Name field (above) for more information.

- **Fax Number 1** – Text, up to 50 characters. If the **Fax Number 1 Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Fax Number 1 Name** is blank or not mapped then this phone number will be imported as "Fax Number 1".

- **Fax Number 2 Name** – Text, up to 50 characters. Refer to the description of the Home Phone Name field (above) for more information.

- **Fax Number 2** – Text, up to 50 characters. If the **Fax Number 2 Name** field (above) is mapped then this phone number will use the label from that field in the source file. If the **Fax Number 2 Name** is blank or not mapped then this phone number will be imported as "Fax Number 2".

- **Email Address 1 Name** – Text, up to 50 characters. This field can be used to provide a description to go with the email address mapped in the **Email Address 1** field (below). You can provide a different description; for example, if your source file contains the value "Spouse Work Email" in this field then this will override the default "Email 1" value and the email address in the **Email Address 1** field will appear in FrontStream CRM as "Spouse Work Email" instead of "Email 1".

  > **NOTE** – You can use this field to cause an email to be replaced in FrontStream CRM. For example, if you import an email with a mapped email name of "Home Email" and there is already an email with that name for the donor, it will be replaced with the new email information from the import file. **If the email name is blank or not mapped, the email information will always be added as a new email for the donor, even if the donor already has the same email.**

  > **Click here to learn more about UPDATING Emails through importing.**

- **Email Address 1** – Text, up to 50 characters. If the **Email Address 1 Name** field (above) is mapped then this email address will use the label from that field in the source file. If the **Email Address Name 1** is blank or not mapped then this email address will be imported as "Email 1". **NOTE** – The email address in this field will become the donor's primary email address.

- **Email Address 2 Name** – Text, up to 50 characters. Refer to the description of the Email Address 1 Name field (above) for more information.

- **Email Address 2** – Text, up to 50 characters. If the **Email Address 2 Name** field (above) is mapped then this email address will use the label from that field in the source file. If the **Email Address Name 2** is blank or not mapped then this email address will be imported as "Email 2". **NOTE** – The email address in this field will always be imported as an informational address, not the donor's primary email address.

- **Mail Preference** – Fixed values. If this field is imported, the value must be '0' or '1' or '2'. A value of zero (0) means *No Preference*. A value of 1 means *Mail OK*. A value of 2 means *Do Not Mail*. If not mapped or left blank, the donor's mail preference is set to 0 (*No Preference*.)

- **Email Preference** – Fixed values. If this field is imported, the value must be '0' or '1' or '2'. A value of zero (0) means *No Preference*. A value of 1 means *Email OK*. A value of 2 means *Do Not Email*. If not mapped or left blank, the donor's email preference is set to 0 (*No Preference*.)

- **Phone Preference** – Fixed values. If this field is imported, the value must be '0' or '1' or '2'. A value of zero (0) means *No Preference*. A value of 1 means *Phone OK*. A value of 2 means *Do Not Phone*. If not mapped or left blank, the donor's phone preference is set to 0 (*No Preference*.)

- **Solicitation Preference** – Fixed values. If this field is imported, the value must be '0' or '1' or '2'. A value of zero (0) means *No Preference*. A value of 1 means *Solicitations OK*. A value of 2 means *Do Not Solicit*. If not mapped or left blank, the donor's solicitation preference is set to 0 (*No Preference*.)

Donor Notes

FrontStream CRM can import **Donor Notes**, which consist of three pieces of information (two of which are optional when importing):

- **Note Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.) If blank or not mapped, the system date will be used for notes created by the import.

- **Note Title** – Text, up to 200 characters. If blank or not mapped, the title will be set to the default value of "Imported Note" for notes created by the import.

- **Note Text** – Text, up to 500 characters. You can enter a note in FrontStream CRM with any number of characters, but the notes created by the import process are truncated at 500 characters. If blank or not mapped, no note is created, even if the note date and / or title are provided.

Donations

As described in the mapping section earlier in this document, you can import up to 15 donations per row from your source file into FrontStream CRM. For each imported donation, the date and amount are required, and any or all of the following fields can be mapped:

- **Donation Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.) If the date is not valid, the donation will not be imported.

- **Donation Amount** – Numbers only. May include decimal points. A value of zero (0) for a donation is allowed only if the "Allow zero-dollar donations" setting is turned on in FrontStream CRM Settings. The donation will not be imported if this field contains invalid values, such as non-numeric values or negative numbers.

- **Donation Campaign** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.

- **Donation Fund** – Text, up to 255 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.

- **Donation Receipt Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)

- **Donation Receipt Number** – Numbers only. No decimal points or negative values. Non-numeric values are ignored by the importer.

- **Donation Receipted Amount** – Numbers only. May include decimal points.

- **Solicitor** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. **NOTE** – *For this field, values that are not already in the list in Settings are imported for the donation but are <u>not</u> added to the list in Settings*.

- **Directed To** – Text, up to 1000 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. **NOTE** – *For this field, values that are not already in the list in Settings are imported for the donation but are <u>not</u> added to the list in Settings*.

- **Appeal** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.

- **Notes** – Text, up to 500 characters. You can enter a **donation** note in FrontStream CRM with any number of characters, but the import process truncates values at 500 characters.

- **How Acknowledged** – Text, up to 255 characters.

- **Acknowledged Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)

- **Issue Receipts?** – True or False (or "Yes", "Y", "No", "N"). Specifies whether this donation should be receipted from FrontStream CRM. If not mapped or left blank, the receipting option of the donor to whom this donation belongs is used (see Donor Details earlier in this section for more information.) **NOTE** – This field is only available when the option to "*Allow donations to be receipted in FrontStream CRM based on donor defaults or mapped values*" is enabled from the import options screen, as described earlier in this document.

- **Receipt Group** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import. If not mapped or left blank, the receipt group from the donor to whom this donation belongs will be used (see Donor Details earlier in this section for more information.) **NOTE** – This field is only available when the option to "*Allow donations to be receipted in FrontStream CRM based on donor defaults or mapped values*" is enabled from the import options screen, as described earlier in this document.

- **Payment Type** – Fixed values. When you map a column to Payment Type, the unique values in for that field from your source file are presented and you must select the defined FrontStream CRM payment type to map for each. You can create additional payment types if needed in the FrontStream CRM Settings area.

- **Check Number** – Text, up to 50 characters.

- **Check Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)
- **Credit/Acct #** (Last 4 digits) – Text, up to 50 characters.
- **Online Transaction ID** – Text, up to 100 characters.
- **Payment Description** – Text, up to 500 characters. You can enter a description in FrontStream CRM with any number of characters, but the import process truncates values at 500 characters.
- **Security** – Text, up to 50 characters. For donations of securities or shares, this is the name or stock ticker symbol for the donated shares.
- **Number of Shares** – Numbers only. No decimal points or negative values. Non-numeric values are ignored by the importer.
- **Honorarium / Memorial Name** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Recurring Profile** – Text, up to 255 characters. The name of a donor's recurring profile that this imported donation should be associated. **NOTE** - Imported donations can be assigned to an **existing recurring profile** for an existing donor by matching on the recurring profile name.
- **Add to Outstanding Membership** - Text, up to 10 characters. Indicates whether the donation being imported should be associated with a membership with outstanding dues. Can be a "y", "n", "yes", "no", "true", or "false".

Membership

FrontStream CRM can import membership information for donors that are being imported or that already exist in FrontStream CRM. This can be used to import active memberships or inactive memberships (historical membership information).

- **Membership Program/Level** – Text, up to 255 characters. You will need to map your membership program/level information to a program and level combination already created in FrontStream CRM.
- **Membership Start Date** – Date. The start date of the membership.
- **Membership Expire Date** – Date. The date the membership expires.
- **Membership Inactive Date** – Date. The date the membership went inactive.
- **Membership Status** – Text, up to 50 characters. You will need to map a status to an existing status in FrontStream CRM.
- **Membership Type** – Text. Must be one of "new", "upgrade", "downgrade", "renewal"
- **Membership Total Dues** – Currency. The total cost of the membership (dues).
- **Membership Other Dues Paid** – Currency. The amount of money paid toward a membership apart from donations that were received and attributed toward membership dues. (See donation import field "Add to outstanding membership?")
- **Membership Benefits Sent** – Text, up to 10 characters. Indicates whether membership benefits were sent to the member. Can be a "y", "n", "yes", "no", "true", or "false"

Groups

As described in the mapping section, earlier in this document, there are two options for creating groups and assigning donors to group during the import. In either case, the group name is limited to 50 characters. Refer to the **mapping section** above for full details on importing groups into FrontStream CRM.

Custom Fields / Donation Custom Fields

As described in the mapping section, earlier in this document, custom fields can be created on the fly, at both the donor and donation level, to store information for which FrontStream CRM does not have a built-in field or function. The number and type of custom fields depends on the version of FrontStream CRM. The import rules for each type of custom field are as follows:

- **List Drop-Down** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. Values that are not already in the list in Settings are added automatically during the import.
- **Date** – Date. Value must be the full date, not just month/day or year (for example, "01/01/2011" is valid but "01/01" and "2011" are not valid.)
- **Textbox** – Text, up to 50 characters.
- **Text Drop-Down** – Text, up to 50 characters. FrontStream CRM stores a list of valid values, which you can add to or edit in Settings. **NOTE** – *For this type of custom field, values that are not already in the list in Settings are imported for the donor but are <u>not</u> added to the list in Settings.*
- **Number**– Numbers only. May include decimal points. Negative values are allowed. Non-numeric values are ignored by the importer.
- **Currency** – Numbers only, use for storing monetary values. May include decimal points. Negative values are allowed. Non-numeric values are ignored by the importer.
- **Checkbox** – True or False. Also allowed are "Yes", "Y", "No" and "N". Blank values are interpreted as False (the checkbox is not checked.)

Refer to the **mapping section** above for full details on importing donor and donation custom fields into FrontStream CRM.

Special Options

On the Special Options menu you will find the **Name Tool**. As described in the mapping section earlier in this document, this is used for situations where you have one field in your source file that contains the entire name of each donor (i.e., "Mr. John C. Smith, Esq."), or couple / household (i.e., "Mr. and Mrs. John and Mary Smith"). The name tool can be used to split those complete names into separate fields for importing into FrontStream CRM.

Refer to the **mapping section** above for full details on using the name tool for importing into FrontStream CRM.

APPENDIX B - Import Quick-Reference

[DONOR NAME]	
Display Name	(110 characters max)
Organization Name	(100 characters max)
Name Prefix	("Mr.", "Ms.", etc.; 50 characters max)
First Name	(50 characters max)
Middle Name / Initial	(50 characters max)
Last Name	(50 characters max)
Name Suffix	("Jr.", "III", etc.; 50 characters max)
Salutation (Formal)	(255 characters max)
Salutation (Informal)	(255 characters max)
Addressee (Formal)	(255 characters max)
Addressee (Informal)	(255 characters max)
Nickname	(50 characters max)
Gender	(50 characters max)
Spouse Name Prefix	("Mr.", "Ms.", etc.; 50 characters max)
Spouse First Name	(50 characters max)
Spouse Middle Name / Initial	(50 characters max)
Spouse Last Name	(50 characters max)
Spouse Name Suffix	("Jr.", "III", etc.; 50 characters max)
Spouse Salutation (Formal)	(255 characters max)
Spouse Salutation (Informal)	(255 characters max)
Spouse Addressee (Formal)	(255 characters max)
Spouse Addressee (Informal)	(255 characters max)

[DONOR NOTES]	
Note Date	(date, duplicated to Affiliate spouses)
Note Title	(200 chars, duplicated to Affiliate spouses)
Note Text	(500 chars, duplicated to Affiliate spouses)

[DONOR CUSTOM FIELDS]	
customer-specific ...	(50 chars, duplicated to Affiliate spouses)

[DONATION CUSTOM FIELDS]	
customer-specific ...	(50 chars, duplicated to Affiliate spouses)

[DONOR GROUPS]	
customer-specific ...	(50 chars, duplicated to Affiliate spouses)
Method 1 - Name in header and Yes/No (or 0/1 or True/False) in data cells	
Method 2 - Generic header (eg, "Group1") and group name in data cells	

[SPECIAL OPTIONS]	
Name Tool - splits full names into prefix, first, middle, last, suffix	

[DONOR ADDRESS 1 - Primary]	
Address Name	(50 characters max)
Address Line 1	(100 characters max)
Address Line 2	(100 characters max)
City	(50 characters max)
State / Province	(50 chars, will add to list)
Zip / Postal Code	(50 characters max)
Delivery Point Code	(2 digits; Premium only)
Country	(50 chars, will add to list)
Latitude	(number, allows decimal, neg)
Longitude	(number, allows decimal, neg)

[DONOR ADDRESS 2 - Informational]	
Address Name	(50 characters max)
Address Line 1	(100 characters max)
Address Line 2	(100 characters max)
City	(50 characters max)
State / Province	(50 chars, will add to list)
Zip / Postal Code	(50 characters max)
Delivery Point Code	(2 digits; Premium only)
Country	(50 chars, will add to list)
Latitude	(number, allows decimal, neg)
Longitude	(number, allows decimal, neg)

[DONOR PHONE / EMAIL]	
Home Phone Name	(50 characters max)
Home Phone	(50 characters max)
Mobile Phone Name	(50 characters max)
Mobile Phone	(50 characters max)
Busines Phone Name	(50 characters max)
Busines Phone	(50 characters max)
Other Phone Name	(50 characters max)
Other Phone	(50 characters max)
Fax Number 1 Name	(50 characters max)
Fax Number 1	(50 characters max)
Fax Number 2 Name	(50 characters max)
Fax Number 2	(50 characters max)
Email Address 1 Name	(50 characters max)
Email Address 1	(50 characters max)
Email Address 2 Name	(50 characters max)
Email Address 2	(50 characters max)
Mail Preference	(0-No Pref, 1-OK, 2-Do Not)
Email Preference	(0-No Pref, 1-OK, 2-Do Not)
Phone Preference	(0-No Pref, 1-OK, 2-Do Not)
Solicitation Preference	(0-No Pref, 1-OK, 2-Do Not)

[DONOR DETAILS]	
Profile	("Donor" or "Organization" or "Household")
Affiliate	("Affiliate" or "Donor" are only allowed)
Create Date	(date)
Website	(255 characters max)
Contact Type	(50 characters max)
Assigned To	(50 char max, duplicated to Affiliate spouse)
Donor Source	(50 char max, duplicated to Affiliate spouse)
Donor Category	(50 characters max)
Status	(50 char max, duplicated to Affiliate spouse)
Member Since	(date, duplicated to Affiliate spouses)
Renewal Date	(date, duplicated to Affiliate spouses)
Issue Receipts?	True / False or Yes / No or Y / N
Receipt Group	(50 chars, will add to list)
Description	(255 characters max)
Job Title	(100 char max, values NOT added to list)
Profession	(100 characters max)
Department	(100 characters max)
Assistant	(100 characters max)
Manager Name	(100 characters max)

[DONATION *X* - Max 15]	
Donation Date	(date)
Donation Amount	(number, may be integer or include decimal)
Campaign	(50 chars, will add to list)
Fund	(50 chars, will add to list)
Appeal	(50 chars, will add to list)
Receipt Date	(date)
Receipt Number	(number, integer only)
Receipted Amount	(number, may be integer or include decimal)
Solicitor	(50 char max, values NOT added to list)
Directed To	
Notes	(500 characters max)
How Acknowledged	(255 characters max)
Acknowledged Date	(date)
Issue Receipts?	True / False or Yes / No or Y / N
Receipt Group	(50 chars, will add to list)
Payment Type	(mapped to GW types during import)
Check Number	(20 characters max)
Check Date	(date)
Credit/Acct. Number	(last 4 digits only)
Online Transaction ID	(a.k.a. CC approval code; 100 chars max)
Payment Description	(500 characters max)
Security Name	(50 characters max)
Number of Shares	(number, integer only)
Honorarium/Memorial	(50 chars, will add to list)
Recurring Profile	(255 characters max)
Add to Outstanding Membership	(10 char max) True / False or Yes / No or Y / N

[Membership]	
Membership Program / Level	(255 characters max)
Membership Start Date	(date)
Membership Expire Date	(date)
Membership Inactive Date	(date)
Membership Status	(50 characters max)
Membership Type	Must be New, Upgrade, Downgrade or Renewal
Membership Total Dues	Currency
Membership Other Dues Paid	Currency
Membership Benefits Sent	(10 char max) True / False or Yes / No or Y / N

[NOTES ON IMPORT USAGE / TIPS AND TRICKS]
1. Allowed import sources are Excel (XLS or XLSX), Access (MDB or ACCDB), and delimited text (CSV and TXT)
2. Excel source files should not include any merged cells.
3. Column headings must be unique and cannot include spaces, punctuation or special characters.
4. Importing more than 15 Donations per Donor requires multiple passes (15 Donations max per pass.)
5. Source fields can be ignored. Some values can be filled with "default" or "fixed" values.
6. One Source field can be "copied" to import into more than one GiftWorks destination field.
7. Avoid special characters in data (especially Tab and Carriage Returns!)
8. Memo fields are unlimited in the DB but the importer will only accept 500 characters max.
9. Donations are matched to Donors based on all mapped Name fields (including spouse) plus Organization name, or by Display Name, or by a unique key in custom field or by GW donor ID.
10. No Donor info will import without either Display Name or one of: First, Last or Organization.
11. The GIC file will not save info on custom fields, groups, payment types, or special options.
12. Standard = 28 custom fields: 8 List DD, 4 Text DD, 5 Numeric, 5 Currency, 6 others (Text, Check)
13. Premium = 75 custom fields: 20 List DD, 10 Text DD, 10 Numeric, 10 Currency, 25 others (Text, Check)