

# Import Tool User Guide

## Welcome to the GiftWorks Cloud Import Tool!

### This Importer is a Powerful Tool

For GiftWorks Cloud, the Importer is considered a core feature that greatly expands your options and efficiency when adding transactions and updating your data in GiftWorks Cloud. It can be used in combination with other special-purpose software, and it can provide the power to make sweeping corrections and enhancements to your database.

This guide will direct you to the many hidden gems you will want to use and strategies to take advantage of them!

### When to Use the GiftWorks Cloud Importer

In addition to transferring your database of donors and donation payments from your former CRM, spreadsheets, accounting or other donor and donation tracking system into GiftWorks Cloud, you can use the GiftWorks Cloud Importer to:

- Save time when performing batch data entry of highly repetitive payments.
- Export, groom and reimport field content to improve consistency and compliance with your data entry conventions.
- Bring in transactions from a website donation, shopping, or ticketing system such as Venmo, PayPal or Eventbrite.
- Loosely integrate GiftWorks Cloud with other software, such as gift shop point of sale systems and your website.
- Quickly bring in lists of prospects, such as a new board member's holiday card mailing list for targeted mailings.
- Update rosters of Constituents that participate in your programs and teams.
- And many more uses!

In the pages that follow, we will take a high-level tour of the Import software, then drill deeper into each of its features and settings.

## Introduction

This Import Guide explains the operation of the GiftWorks Cloud Importer as well as providing valuable insight into how to groom your data to be most useful in the GiftWorks Cloud environment. Even if you don't actually use the Importer to bring your data into the CRM, this Guide will give you a better understanding of how GiftWorks Cloud is organized under the covers so you can take advantage of the software's many features.

Getting your existing data into GiftWorks Cloud is an important second step to take as a new GiftWorks Cloud user. (The first is to set up your users and organization preferences.) Using the built-in Importer, you can bring a large amount of data into GiftWorks Cloud from your existing files or from other applications and lists without manually retyping everything. To be successful, until you have used it a few times, the Importer requires that you set aside an adequate amount of time for organizing, cleaning up, and grooming your data, and then for the actual import process so that everything flows into GiftWorks Cloud as easily possible without the system timing out waiting for a response. As long as GiftWorks Cloud is busy working on your requests, it will keep you logged in and your session alive. Once the system is idle and waiting for a response from you, if it does not hear from you within 15 minutes, your connection will time out.

**TIP** -we recommend importing no more than 2k records and 20 columns at a time, and keeping the number of worksheets in a file under 5, so that the data import is more manageable, it completes sufficiently fast and there is no risk of a log out.

Before beginning the import process, it's a good idea to read through this **Guide** for a functional understanding of Donors, Donations, Mailings, and Settings. You could also work with a TRIAL account to familiarize yourself with how the software works before working with your actual data. The better informed you are, the better your decisions will be about how to import your data. It is important to understand (among other things) constituent profiles, relationships, custom fields, donor groups and mailing lists.

To give you an idea of what is ahead before we get deep into the details, we will walk through the import process.

## Assistance is a Phone Call Away

FrontStream Import Assistance Services can provide assistance with your import in two ways. We can provide some technical support when you contact [Customer Care](#). Or, you can have FrontStream's staff import and convert your data for you if it is in the format as described below in "Prep your data." Depending on the amount and complexity of your existing data, FrontStream can usually accomplish the conversion in about 10 to 15 business days. Please contact [FrontStream Sales](#) for more information and to request an estimate.

# Brief Overview of the Import Process

The Import Process will be covered in greater detail, but at this stage, it is helpful to preview the steps you will go through.

**Before You Start, Prepare Your Source Data File** - Make sure your data is ready for GiftWorks Cloud to use. This includes exporting or saving your source data in one of the formats that GiftWorks Cloud can read, grooming your data so that it is internally consistent and complies with your NPO's data entry conventions, and adding in some identifiers that will help GiftWorks Cloud know how to update existing records.

## Import Process Steps:

1. **Launch The Importer** - Navigate to the [ **Tools** ] page and select and launch [ **Import Data** ].
2. **Upload Your File** - Let GiftWorks Cloud confirm that it can parse your data file into rows and columns of data.
3. **Set Import Preferences** - Set preferences about how you want your data to be handled, including whether you want only new records created, only existing records updated, or both.
4. **Map Your Data** - For each column of data in your source file, identify a matching GiftWorks Cloud field within which to place that data.
5. **Request Multiple Field Sets** - Let GiftWorks Cloud know if you need extra fields for importing more than one person, mailing address, phone number or e-mail address.
6. **Verify Required Fields are Mapped** - If your Preferences allow GiftWorks Cloud to create new records, make sure that the minimum required fields necessary to create a new record have been mapped to columns in the data file or appropriate default values have been set.
7. **Select Record Matching Keys** - In order to have your import file properly update existing records, GiftWorks Cloud needs to know how it can uniquely identify an existing record that should be changed.
8. **Staging and Testing The Import** - As a safeguard, before any changes are made to the database, GiftWorks Cloud will process all the records in your import file and report back as warnings and errors the issues that it finds.
9. **Commit The Import** - If any warnings and errors were expected or are not significant, commit the changes to the database.
10. **Download the Error File / Check Your Results** - As a convenience, GiftWorks Cloud prepares a downloadable file with the records that produced errors and warnings so that you can look at only the records that failed to import, fix the issues and re-import just these problem records. Spot-check the imported data in your database for any

surprises. It is far easier to undo any unexpected results before other members of your NPO staff begin posting further changes to these records.

## Prepare Your Data to Import

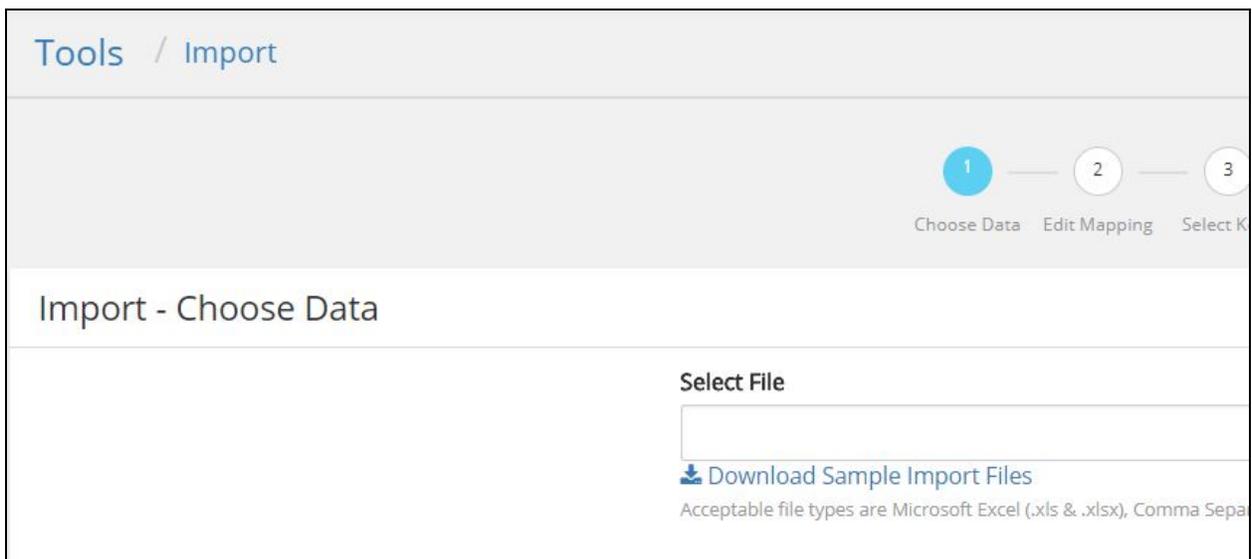
The key to importing data into GiftWorks Cloud, is having your data in the correct format. GiftWorks Cloud can import information from a Microsoft Excel worksheet (.xls or .xlsx) file or from comma or tab delimited text (.csv or.txt) file.

The GiftWorks Cloud Importer looks for your information to be organized in rows and columns, with column headings that will help with mapping the data to the appropriate fields in GiftWorks Cloud.

Below are sample templates for standard imports that you can download to organize your data.

For custom imports please contact [Onboarding@frontstream.com](mailto:Onboarding@frontstream.com).

Use the below descriptions to create your template of data. The Excel templates are attached in this article, as well as within GiftWorks .



The screenshot shows the 'Tools / Import' section of the GiftWorks Cloud interface. It features a progress indicator with three steps: '1 Choose Data' (highlighted in blue), '2 Edit Mapping', and '3 Select K'. Below the progress indicator, the main heading is 'Import - Choose Data'. Underneath, there is a 'Select File' label, a text input field, and a blue link with a download icon that says 'Download Sample Import Files'. At the bottom, a note states: 'Acceptable file types are Microsoft Excel (.xls & .xlsx), Comma Sepa'.

### “Donation simple”

Use this template for your donation records; Columns include Donation date, payment method, amount; you can also include the check #; date; and fund to which the donation is

allocated. If you do not add a fund on your spreadsheet the donation will automatically be attributed to a default fund.

Display Name	Donation Date	Payment Method	Total Amount	Check #	Check Date	Fund
John H Smith	1/1/2018	Credit Card	\$20			Annual Fund
Acme	12/1/2017	Check	\$1,000	101	12/1/2017	Annual Fund
The Lee Househo	12/31/2017	Cash	\$100			Annual Fund

### “Constituent simple”

This template is for basic constituent records that have simply one name, address, email, in each row to be imported.

Prefix	First Name	Last Name	Display Name	Profile Type	Email Address	Phone Number	Address Line 1	Address City	Address State
Mr.	John	Smith	John H Smith	Individual	<a href="mailto:john.smith@xyz.com">john.smith@xyz.com</a>	5555555555	123 Road St.	Seattle	WA
			Acme	Company	<a href="mailto:acme@xyz.com">acme@xyz.com</a>	2222222222	456 Street Rd.	Reston	VA
			The Lee Househo	Household	<a href="mailto:thelees@xyz.com">thelees@xyz.com</a>	4564334453	674 country Rd.	Lancaster	PA

### “Constituent with 1 phone, address, email address”

Use this template if ALL your records to be imported have a single name, address and telephone number. If any of your contacts have multiple names, addresses, emails or telephone numbers, use the “Constituent with multiple contact info” template, for example if you have seasonal addresses.

Email Address	Phone Number	Address Line 1	Address City	Address State
<a href="mailto:john.smith@xyz.com">john.smith@xyz.com</a>	5555555555	123 Road St.	Seattle	WA
<a href="mailto:acme@xyz.com">acme@xyz.com</a>	2222222222	456 Street Rd.	Reston	VA
<a href="mailto:thelees@xyz.com">thelees@xyz.com</a>	4564334453	674 country Rd.	Lancaster	PA

### “Constituent with multiple contact info”

Use this template for constituents with multiple phone, email and addresses; this will take contacts with single lines of information as well. GiftWorks Cloud accepts 3 entries for each line of data (e.g. 3 email). More than 3 lines could be accommodated by using Custom Fields.

Email 1 Address	Email 2 Address	Email 3 Address	Phone Number	Address 1 Line 1	Address 1 City	Address 1 State
<a href="mailto:john.smith@xyz.com">john.smith@xyz.com</a>	<a href="mailto:john.smith@abc.com">john.smith@abc.com</a>	<a href="mailto:john.smith@123.com">john.smith@123.com</a>	5555555555	123 Road St.	Seattle	WA
<a href="mailto:acme@xyz.com">acme@xyz.com</a>	<a href="mailto:acme@abc.com">acme@abc.com</a>		2222222222	456 Street Rd.	Reston	VA
<a href="mailto:thelees@xyz.com">thelees@xyz.com</a>			4564334453	674 country Rd.	Lancaster	PA

## “2 constituents with relationships”

Use this template to import constituents that have relationships with other constituents. You will include both of their contact information as well as their relationship type and role in the same line.

Relationship Role 1	Relationship Type	Relationship Role 2	First Name 2	Last Name 2	Display Name 2	Profile Type 2
Spouse	Individual	Spouse	Anna	Smith	Anna Smith	Individual
Employer	Company	Employee	Harper	Leeman		Individual
Household	HouseHold	Household Member		Joanna	Lee	Individual

## Importable Data Files

### File Format

The Importer in FrontStream's GiftWorks Cloud is quite flexible concerning source file formats and layouts. It can import information from a Microsoft Excel worksheet (.xls or .xlsx) file or from comma or tab delimited text (.csv or .txt) file. Most applications that are set up to export contacts and transaction information will export to one of these formats. If your existing information is not already in one of these formats, you can use Excel, Open Office or Google Sheets to convert from a dozen other file formats to Excel or CSV. Most other file formats, including Microsoft Access database files, can be opened using Microsoft Excel and then saved as an Excel spreadsheet or CSV file. (Consult your existing application's documentation or technical support for information on exporting from your particular application.)

The GiftWorks Cloud Importer looks for your information to be organized in rows and columns, ideally with column headings that will help with mapping. The columns may be in any order and your file may include a row of column names or not, though having column names makes mapping much easier. If you do not have column heading names (FirstName, LastName, etc., as in the image above), you can still import into GiftWorks Cloud, but it will not be as easy to distinguish your data and reliably map columns to fields in the database. (GiftWorks Cloud will give your columns default names of F1, F2, F3, and so on if the preference is set to: My data file

has "No-Headings") Unless your file is quite simple, it is worth taking the time to edit the file to add a row of column headings.

The most efficient format for importing is what is called a "wide flat file" where all the information for a donor other than donations and notes is in one row. GiftWorks Cloud can also import repeating rows (Three addresses for the same donor are in three separate rows, all with the same unique donor key information.) If this is your situation, refer to the topic "Importing From Multiple Tables" below, and the article named "Key Matching."

## Getting Started - Baby Steps

**1. Start Simple:** So, break up your import. Start easy with importing the unmarried Individuals, then Companies/Organizations, then finish with Households, as they are the most complex. We also have the challenge that there is no backup and restore or undo currently available, so start with a subset of your records. This means that if they do not go into the database exactly as you expected, you don't have many records to fix or delete before trying again with corrected data.

**2. Start Small:** Just because you can import a wide flat file that includes every field plus the kitchen sink doesn't mean you should start with a completely mapped import, as you are learning the quirks of the importer. The process is complex, and with each mapped field comes the risk of errors in either the data or the mapping that can disrupt the remainder of the import.

**3. Constituents Before Donations/Contributions/Payment Transactions:** Finally, import your contributions and payment transactions separately, after you are confident that your constituents are properly imported.

Keep in mind that there are a few fields in a household relationship that cannot be filled through any means other than the initial import of a wide file that has data for both constituents that make up the household, or by hand-editing after the import. Jump to the page on Household records to better understand how Household Constituents in GiftWorks Cloud are related to each other and how to import to each of them.

***Tip - If your source data does not include a unique ID or key field exported from your source system, take a moment to add a column to the front of your file that is filled with row numbers that can be mapped to the Legacy ID field or a Custom Field setup to be indexed as a Foreign Key.***

## Rules for Column Headings

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

1. **Avoid non-alphanumeric characters:** Stick to letters and numbers for your column headings. Spaces and colons are permitted, but avoid slashes, ampersands (&) and other symbols and punctuation.
2. **Limit the length of your column headings:** Keeping your column headings as short as possible and having distinctive information within the first 25 characters will make the mapping easier. When mapping, you are not able to see the entire column name if it is too wide for the display.
3. **Use distinct column headers:** Make sure the heading for each column is unique. If you are importing two peoples' information, adopt a naming method that keeps them separate such as "P1 FirstName", "P1 LastName" for the first person and "P2 FirstName", "P2 LastName" for the second person.
  1. **Have a heading for every column:** Be sure that you have a heading for each column that contains data. While GiftWorks Cloud won't decide there are no more columns to import once it hits an empty column heading, having GiftWorks Cloud assign a meaningless default name to each unnamed column makes the mapping more difficult.

## **Rules for Field Data (cell contents in spreadsheets)**

1. **No Special Characters:** If you export or copy/paste from another application, there may be characters, such as tabs, line breaks, or page breaks that appear as squares ("□") signifying non-printable characters. Except for a select few fields designed to retain and display these layout characters, they may cause the importer to fail or for reports and mailings that display these characters to break. They can get into your data by copying formatted text from Word into Excel, copying web page content, and other ways. These characters can be difficult to locate, but you must watch for and remove any that do not have an obvious reason to be in the data. One way to find them is to save an Excel workbook as a .csv (comma-separated values) file and then open that file in a text editor, like Notepad. It is easier to see unusual characters when scanning a text file than a worksheet. Simple tip - If you see a character you would not normally type, it doesn't belong in your data. In addition to the above for Text fields make sure they are not > 255 characters within the cell as this will not be handled by the import tool.
2. **Dates Should Be Complete:** GiftWorks Cloud only recognizes dates with month, day and year (for example, 02/28/1969). Just a month and year or month and day will not import into a date field. If you have dates that are only month and year or only year, you will need to complete them to be able to load into a date field, or to separate them into columns to load as custom fields. (For example, to recognize birthdays, the date segments can be imported to Custom Fields that hold text, such as Birthday Month, Birthday Day.) An easy way to see if dates are properly loaded as dates is to open the file in Excel and change the cell formatting from Date to Number, then see if they are a 5-digit number (with a decimal if there is also a time of day.) There is an organizational preference you can set to choose between European and American dates DD/MM/YYYY and MM/DD/YYYY. If that preference is set, for a column of dates

- as long as they are consistent with each other - GiftWorks Cloud will figure out which format to use. For columns of dates in Excel, select to display them as "Short Date Format" for GiftWorks Cloud to recognize them as dates instead of numbers. Non-date data in a date column will cause an error.

In some cases, where your date field also includes a time stamp ( 12/26/2005 12:00:00 AM), the GiftWorks import tool will also accept this.

1. **Field length:** GiftWorks Cloud limits the length of the information it imports into each field to the length of that field in the GiftWorks Cloud database (see Appendix A: Importable Fields) In addition, no matter how large the field is in in GiftWorks Cloud, the maximum length of information that can be imported from a single cell in Excel can not be >255 characters. So, if you're importing a Note, although the GiftWorks Cloud field is defined as a Memo field that accepts any length of data, Excel will not pass to the importer more than 255 characters.

## **General Guidelines for Importing from Excel**

1. **One Worksheet at a Time:** If you have multiple Excel spreadsheets to import, or multiple worksheets from within a workbook, you'll need multiple passes through the Importer, as GiftWorks Cloud only maps and reads one worksheet per Import. When you upload the file, GiftWorks Cloud lets you specify which worksheet within your workbook you want to import.
2. **Records as Rows:** Your data must be organized with donor information presented in rows, not columns. GiftWorks Cloud processes one row at a time and creates the records necessary to store the data in that row. (Don't let the mapping screen confuse you - it presents a row of source file data as a column to make mapping easier.) We will consistently refer to importing "a row of data" as you would see it in the source file, and that we map each source file column to the table record and field the data should be placed within. (If your worksheet is accidentally organized in columns, you can use Copy - Paste Special and then check the Transpose checkbox to paste your data reorganized as rows, rather than columns.)
3. **No Blank Rows:** Your Excel data may begin in the first row of your worksheet or must begin in the second row, with column headings in the first row. If blank rows proceed your data, you must delete the blank rows at the top of the worksheet until it meets these criteria.
4. **No Merged Cells:** 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.
5. **Contiguous Data:** 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 several rows below it on the same sheet. The importer stops at the first blank row it encounters and any subsequent rows of data are ignored. If the data in both blocks has the same fields, just delete

the blank rows between blocks. If the blocks contain different information, you should move one of the blocks to a separate sheet.

1. **One Transaction Per Row:** You can import only one donation or payment per row of source data. If your file contains multiple donation payment column sets per row, then you will need to either a) split it into multiple sheets, b) copy and paste to append columns together to make a single set of long columns of payment data, or c) make multiple passes through the Importer to import one column set of payment data per pass.

## **Importing from Database Files such as Access Tables**

Access and similar database tables (ending with .accdb, .mdb, .db and others) must be opened with Excel and re-saved as either Excel spreadsheets (.xlsx) or CSV files. In the case of single-table databases, the process is simple and the result looks just like a spreadsheet. For multi-table databases, you have the option of saving the data out using a query that creates a flat file, or exporting each individual table and running multiple import passes to get the data into GiftWorks Cloud.

## **Importing Multiple Related Tables**

The database you want to import may have multiple tables that can be exported individually, typically with the donor's main information in one table, transaction/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 that uniquely identifies the contact person each row of transaction, address or phone data is associated with.

In this case, you have two choices for importing related table data into GiftWorks Cloud:

1. You can import each table in a separate pass through the importer, and use a custom Donor field for matching up related data based on the source software's ID field that related records have in common, then designate that this field is to be used as the primary key for matching and updating related records.
  - A. - Your first import pass should map all the necessary information (donor / organization name, etc.) that are required fields to create a new donor in GiftWorks Cloud, including the source software's contact or donor ID (primary key) field.
  - B. - Prior to starting the Import, you should create a Custom Field in GiftWorks Cloud to store this primary key (for example, "Old System ID") for each donor record imported into GiftWorks Cloud, so that subsequent imports can use this value for matching and updating related records.

C. - Subsequent imports (for donations, addresses, etc.) should use this Custom Field value as the Record Matching Key to check for an existing matching constituent record in GiftWorks Cloud.

2. You can create queries that join data from multiple tables into a single wide flat file, and import the result of those queries into GiftWorks Cloud.

A. - You need to write queries that join the tables using the primary key field. These queries will need to output the data needed to uniquely match up related records, preferably the ID or Primary Key field, or the combination of fields that will uniquely match up to an existing record (First Name, Middle Name, Last Name, Organization Name, primary e-mail address or GiftWorks Cloud's existing Display Name field) along with the new information from the joined table (donations, addresses, phones and similar).

B. - Each query may produce multiple rows per donor. For example, a donor that has multiple donations or multiple addresses will have one row per address or donation.

C. - You can then import the result of these queries into GiftWorks Cloud in the same manner you would import from an individual table.

### **Importing from and Troubleshooting the Structure of Text Files (.csv or .txt)**

Data stored in text files is usually "delimited" which means that the different fields of data are separated by a special character that marks the end of one field's data and the start of the next field's data. Commas are most commonly used for this purpose, as are tabs, spaces, semicolons, tildes and pipe ("|") characters. Importing from text files is very similar to importing from Excel spreadsheets, and in fact, a comma or tab delimited file can first be opened and checked with Excel to check its structure. If properly constructed, it will look like a well-organized spreadsheet with consistent rows and columns of data. The current max field length for Giftworks Cloud for text and text area fields is 255 characters.

For example, a poorly constructed comma separated values (CSV) file may have:

ID, FirstName, LastName, FamousQuotation

23, Albert, Einstein, I have not failed, I've just found 10,000 ways that don't work.

This row of data cannot be "parsed" correctly because there are three commas total in the Heading row signifying a four column structure, and the row of data has more than the required three commas to "parse" or separate into four and only four fields of data. (The space that follows each delimiting comma is optional and permitted for improving readability for humans. They are ignored and removed by the Importer.)

Since we don't want to be precluded from having a comma included as part of our data, there are two options. The first option is to change to another delimiter character that we know we would not want to use in our data, such as a pipe character. Using an alternative delimiter is hard to predict and not supported by all software. The other option is to wrap the field of data

that might contain a comma in yet another pair of wrapper characters such as quotation marks. This is the pattern that GiftWorks Cloud supports In this case, our example might look like:

```
ID, FirstName, LastName, FamousQuotation
```

```
27, Albert, Einstein, "Education is not the learning of facts, but the training of the mind to think."
```

Wrapping all fields, not just those with a delimiter character (comma) included in the data, is also correct, as shown here:

```
"ID","FirstName","LastName","FamousQuotation"
```

```
"41","Orville","Wright","No flying machine will ever fly from New York to Paris"
```

In this example, the use of quotation marks as a boundary that wraps content that should be treated as a single field results in exactly three commas acting as delimiters, again resulting in four cells of data that align with the four column headings.

Since we don't want to be precluded from having quotation marks as part of our field data or content, the concept of "Escaped characters" is used. Two quote marks in a row is a way of signaling to the software that this particular quote mark should be ignored as a wrapper character, and instead it should be replaced with a single quote mark that is to be included in the data.

```
ID, FirstName, LastName, FamousQuotation
```

```
35, Isaac, Asimov, "The most exciting phrase to hear in science, the one that heralds new discoveries, is not ""Eureka!"" but ""That's funny..."""
```

There are other escape characters that you may come across, such as /n to signify a new line character inside a multi-line salutation field, or /t to signify a tab character.

Knowing how data in a CSV "should look", you can open a CSV with a text editor like Notepad and easily spot unsupported hidden characters that you do not want in your data or extra characters that might be throwing off the parser. Parsing is easily tested by opening in Excel and seeing if every row ends in the same column.

## **To Groom or Not To Groom**

While it is completely optional and will not prevent your data from being imported, prior to Import is THE BEST opportunity to groom your data for internal consistency and usability. Your Board reports will look more professional and the software is easier to use if your data is consistent. See the Grooming topic below.

## **Matching Keys - Updating Constituent Records**

A key (pun intended) consideration when importing data into GiftWorks Cloud is matching up the donor, volunteer, prospect or contact whose information you are importing with Constituent records that are already in your database, so that you are updating an existing

record instead of creating a new duplicate record. (This also applies to matching up related data that is spread across multiple import files or being imported in multiple passes. See the topic ***Matching Keys - Updating Related Child Records***) In some cases, you will want to add new constituents to GiftWorks Cloud, and in other cases you will want to update information for existing constituents. GiftWorks Cloud provides options for you to specify how information [CH1] from your source import file so it will be predictable about when it will update existing constituents, create new constituents, or both.

If you are matching up information to existing donors, your options are determined by the fields you have available for mapping in your source file. Select key fields will be used as the active key for matching and updating existing records according to the following order of preference, which reflects the reliability of the key:

Now you are required to choose your key combination during the 'Add + update' or 'Update Only' mode. Possible values are - Name fields, email, phone and custom fields.

**A Custom Field that serves as foreign key** - When setting up a Custom Field, it can be configured to be a Key field, meaning that it is expected to contain unique values. A field used for this purpose typically is filled with the ID number assigned by another software package; for example, a QuickBooks Customer ID.

**None of The Above - Select a Key:** If none of these key fields are mapped, then you will be prompted to select a combination of other mapped fields to create a unique "compound key" for matching existing records. These fields include the Display Name, the person's name segments (e.g. *Last Name* and *First Name*), *Company* name, *Profile* (Individual, Household or Organization), e-mail address, phone number, and mailing address street number. Be aware that using a lot of related table information (emails, mailing addresses) in a compound key will significantly slow down the import process, so be patient as GiftWorks Cloud looks up every one of your constituent records and compares it to your selection of compound keys of existing constituent records. Your goal is to select enough fields so that each Constituent will have a unique key, but not so many that you risk breaking a valid match due to information that has changed over time.

Note - If GiftWorks Cloud finds more than one Constituent record matching a row's compound key, the import of that row's data will fail.

### **Active Key considerations**

Once your import file has key fields mapped or selected, then the highest priority key field or fields will serve as the Active key, and all other mapped columns, even though they could be used as keys, will be used to update data in matching records. For example, if a file has columns for *Display Name*, *First Name*, and *Last Name*. Since *Display Name* may be the Active Key, then

any non-blank data in the *Display Name*, *First Name*, and *Last Name* fields will be used to update the matched record instead of being used for record matching. Later on in this guide we will discuss a setting that determines how blank fields (nulls) are handled.

The takeaway at this point is that if your goal is to both update existing records and create new records with one import and you have the *Display Name* available for existing records, and you do not intend to be updating the *Display Name*, *First Name*, and *Last Name* fields for every record (your import file may not have the latest and best data for these fields) then there are three approaches you can take:

**1. Run the Importer twice using the same file.** Import the first time with only the *Display Name* field mapped, leaving the fields *First Name*, and *Last Name* set to "Do Not Import" (see the **Mapping** topic) so that these fields are not overwritten for these existing records and have the import preference set to "Only Add New Records". Repeat the import with all of these fields mapped and the import preference set to "Only Add New Records" so that whatever new records that can be created, will be created.

**2. Split the list.** Sort the source file by *Display Name*, and place records that have a *Display Name* in one file or spreadsheet, and those without one in another file or spreadsheet. For the sheet that has *Display Names*, either delete the columns for, *First Name*, and *Last Name* so they are not mapped and therefore will not overwrite anything, or keep the columns but delete the data in the fields so there is nothing to overwrite except for the few fields where new data is intentionally being placed in the field to be imported as a new value.

**3. Prepare the file so it can be used in an Import that is set to both Add New Records and Update Existing Records.** At the time of import, when you select to add new constituents and also update existing records you can do so using the import tool. In this example when for instance you have previously added some of the constituents and their associated details in a prior import, you need to select the fields for import keys. This option is given to you after the mapping process has taken place and Giftworks asked you to enter the import keys. Examples of Keys may be "Display Name" and "email address". Should you select those keys, Giftworks will then look for matching (existing) constituents in the database. When it finds a match it will update their details but not create a new record. In the case where Giftworks has not found a match on either "Display Name" and "email address" it will go ahead and create a new record for the Constituent to be imported, best practice here is to try and use the same import keys for each import. This will reduce duplication of records being imported to your database.

## More About Display Name

GiftWorks Cloud places special emphasis on the *Display Name* field. The software enforces that the *Display Name* field will always be unique across your database. This allows records to be matched for updating solely by providing the *Display Name*. However, *Display Name* is an

editable field, and so the ability to match an existing record may be lost if Display Names are edited between the time you export a list of Display Names and the time you wish to import any new data to those records. It may be that the intention of your Import is to update the *Display Name* based on formulas you create in Excel, so GiftWorks Cloud makes no assumptions about whether you wish to match records based on the *Display Name* field, or match based on other fields so you can import an updated value for *Display Name*.

The *Display Name* field powers the Constituent Quick Search feature. Compared to the other full-text search tools in GiftWorks Cloud, the Constituent Quick Search is designed to be nearly instantaneous at providing a list of likely suspects based on the first few characters you type. It does that so quickly by looking only at data saved in the *Display Name* field. As a result, a popular use of *Display Name* is to add alternative names to a record to make searching for a particular Constituent easier by being able to search for a nickname, maiden name, a personal business name (d/b/a), or a business's primary contact person. Finally, *Display Name* may be edited to distinguish between two donors that have the same name by adding a distinguishing bit of information, such as the city they live in or the company they work for. (Note - Distinguishing information placed in curly braces is displayed on screen and is searchable but will not be printed on most reports.) The point is that it is not uncommon for this field to be edited from time to time.

Note - It is optional that Display Name has data for new records. If mapped but the field is blank, GiftWorks Cloud can nevertheless import the new Constituent (if the other required fields have sufficient data) and will calculate a unique Display Name field value from data in other fields. (See the topic ***More About Uniqueness for Display Names.***)

Continuing with the example above, if you are grooming your data, then among the mapped fields *Display Name*, *First Name*, and *Last Name* you could choose to use *Display Name* as the active Key for matching records and map name fields that have updated values you wish to overwrite the existing values; or, you could choose to use *First Name*, *Last Name*, *Company* and *e-Mail* as the combination of fields that with uniquely match an existing record, and update the *Display Name*. Just plan ahead about whether the data in a column will be used at a matching key or that columns data that might be updated. You can't do both or you will break the ability to match existing records.

If working in Excel, a tip is to set a background color on the columns you intend to use as matching Keys so that you do not inadvertently make corrections to the data in those columns. e.g. If *Display Name* will be the active Key, fix the misspelled last name in the *Last Name* column, but not in the *Display Name* column or the update will not match the existing record. If *Display Name* is available to be the active Key, then both *Last Name* and *Display Name* can be updated in the same import.

**Pro Tip -**

Note that the matches for the active Key must be exact. If *Display Name* is the active key, “Bob Smith” and “Robert Smith” are considered two different constituents, no matter what other information (addresses, phone numbers, etc.) they may have in common. A GiftWorks Cloud constituent with a *Display Name* of “Acme Anvils, Incorporated” is not the same as a constituent with a *Display Name* of “Acme Anvils, Inc.” Watch for leading, trailing, and multiple spaces between words along with differences in punctuation.

Note also that the *Company* field (Organization Name) can be selected for matching. If *Company* is selected to be included in a compound key mapping, one import source record containing “Rob Smith” with *Company* blank will not match an existing Company Profile record containing the name segments for “Rob Smith” and *Company* name of "Downtown Rotary Club" and the software will try to create a new Individual record for Rob.

### **More About GiftWorks Cloud Constituent ID**

You are not able to specify the GiftWorks Cloud *Constituent ID* for a new record. This ID is a unique sequential number that is automatically assigned when a constituent record is created, and you cannot override its value. Therefore, if you have an existing record ID from your previous system, you should create a Custom Field called “Old Donor ID” (or similar).

## **Process The Import**

As a checklist, here is a recap of the considerations in preparing your file:

- The data to be imported is in a supported file type, in a contiguous block, preferably with headings.
- Grooming has been completed so that all of your records display data in a consistent style.
- The data file has been scanned for unexpected/unrecognized characters.
- >255 Characters per cell of data not accepted by import for Text and Text-area fields
- The keys needed to match existing Constituent records in order to update them have been included.
- If the default profile derived from field mappings is inappropriate, add a Profile field and fill it with values.
- Name segment fields containing multiple names have been parsed into separate fields for each spouse.
- Field values for dropdown picklists have been conformed to the values GiftWorks Cloud will recognize, such as Profile names and Status codes.
- Values are included for required fields for new constituent records plus any included new child records.

- If more than one person is mapped, the relationship type and any desired roles for their relationship have been filled in.
- Multiple related files have a common key value and a Custom Field has been setup as a foreign Key field to store that value.
- Any Custom Fields necessary to store the data have been created.
- Columns with values for group memberships have been parsed and filled.
- A Name field has been included and has values for each child table and record so a problematic import can be run repeatedly.
- Any "magic values" necessary to override the default settings and processing are included.

Once you have your Source Data Files prepared, it's time to do the deed. Proceed to Step 1.

## 1) Launch The Importer

Once your file is groomed and prepared for importing and appropriate default values have been set for new records, start the Import process by logging in to GiftWorks Cloud with a user account that has permission to perform imports, then navigate to [ **Tools** ] => [ **Import Data** ]. If you don't see these navigation options, you need to contact your NPO's Administrator to add permission to perform Imports to your account via [ **Setup** ] => [ **Manage Users** ] and [ **Manage Roles** ]

## 2) Upload Your Data File

As the Importer opens, you will see the option to Upload a File.

Click on [ **Browse** ] and navigate in your local file system to select your data file and click [ **Open** ] to upload the file to the GiftWorks Cloud server. The Importer will immediately alert you with the error "Incorrect File Format" if the file is not one of the supported file types. The importer accepts:

- **CSV - Comma Separated Values** - A text file with the extension .csv that contains data values that are delimited by commas and wrapped with quotes (single or double).
- **TXT - Tab Separated Values** - A text file with the extension .txt that contains data values that are delimited by tabs and wrapped with quotes (single or double).
- **XLS - Excel Format** - An Excel spreadsheet file with the extension .xls or .xlsx that contains data values that are expressed in Excel's XML format

If the file you upload is an Excel file, you will be prompted to **Select Worksheet** and choose the one you would like to import. As a convenience, GiftWorks Cloud lists the worksheets found in the workbook along with the number of columns of data found in the worksheet. Only one worksheet can be imported at a time. If your file has multiple sheets of import data, you will need to repeat the entire Import Process, selecting and mapping each sheet.

**Pro Tip** - If you have several worksheets of import data that all have the same structure - for example, you use the same worksheet column layout for all of your team rosters, but have only one team listed per worksheet - then you will save yourself a lot of time if you paste all the rosters, one after the other, into one long spreadsheet. If not already included, add a column and fill it with the Team's name or similar identifier of the worksheet they were copied from and map this column to either the **Source** field, a **Group**, or a Custom Field named **Team**.

### 3) Set Import Preferences

Now that your data file has been uploaded, you will have the option to set your import preferences.

#### **My Data File has Headings**

The first option is to indicate whether the data file being imported has a row of headings above the first row of data. If this box is checked, the first row is treated as headings and displayed as such in the Mapping screen. If not checked, the first row is treated as data to be imported.

#### **Select to Only Add or Only Update Constituent Records, or Both Add and Update**

Depending on whether a row of data's Key value matches the corresponding Key value of an existing constituent record, then the import preference setting will determine how GiftWorks Cloud will handle that row of data. Specifically, you can set the import preference to:

- **Only Update Existing Records** - Only records that exactly match a single existing record will be processed, causing the data in that constituent record to be updated. If a row of data does not match one and only one existing record, then the row will fail to import.
- **Only Add New Records** - Only records that do not match any existing record will be processed, causing the data to be used to try to create a new constituent record. If a row of data matches one or more existing records, then the row will fail to import.
- **Both Add and Update Records** - Records that exactly match a single existing record will be processed, causing the data in that constituent record to be updated. Records that do not match any existing record will be processed, causing the data to be used to try to create a new constituent record. If a row of constituent data matches more than one existing record (because the combination of key fields is not sufficient to uniquely identify a single record), then the row will fail to import.

The default setting is to both add and update records, and in the majority of circumstances, this is the preferred choice. But, the other two choices have strategic uses:

- **Choosing Update Only** - If you are doing a multi-table import and have already imported all the constituents for which you have complete information and are now importing their donations, you may wish to set "Update Only" so that transactions are loaded only for existing Constituents in the system. Constituent records will not be created for transactions where you have only minimal data. Instead, the transactions associated with incomplete Constituent records that you don't want to load in your system will end

up in the Download file of records that did not Import. You can then change the Constituent to match a generic record for a Constituent named "Unidentified Donor" and import this file again. At the end of the process, your transaction totals should match your source data without polluting your database with incomplete Constituent records.

**Note** - This Update Only option will also **make mapping easier** in that you will not be required to map the required fields necessary to add a new constituent.

- **Choosing Add Only** - You may be presented with a board member's holiday card mailing list. To the extent that some of these people are already in your database, you may trust your typing to be more accurate and consistent with your data entry conventions, or to have a more current mailing address than what you find in this list from your board member. As you import the list in order to do an email solicitation and use email as the Key for matching existing records, then choosing Add-Only will not accidentally overwrite the good data you have for people already in your database. Only constituent records whose email is not already in your system will be added.

Note that if the selections above result in GiftWorks Cloud trying to create a new record, the creation of a new constituent record may nevertheless fail if the data needed for all required fields necessary to create a new record has not been either mapped or provided by default. (Set default values for fields under [ **Setup** ] - [ **GiftWorks Cloud fields** ]) GiftWorks Cloud will test your mapping and point out if a required field necessary to create a new record has not been mapped. If all required fields are mapped, then the import can proceed to the next step.

GiftWorks Cloud cannot create a new Constituent record without either a name or a company name; therefore, one of these mapped fields must contain non-blank data, or the data in that row of the import file will not be imported. Note that even though a required field is mapped to a column, for some rows the data in the field in that column might be blank. For any rows that would otherwise create a new constituent record but do not have data in a required field, the mapping may be tested as valid, but those rows will nevertheless fail to import. Conveniently, any rows of your source file that fail to import will be written out into a downloadable file that will include an error message that identifies the issue. More on this later in **Step 11 - Download the Records with Errors File**.

After making your selections, click [ **Next** ] to proceed to the **Mapping screen**.

## 4) Mapping Your Data

### Mapping Screen Layout

You have arrived at the Mapping screen. Let's take a moment to get oriented and put a name to the different parts of the screen.

The top is the Header area that has a few settings in it which we will come back to.

In the center is the Mapping Grid.

Below the Mapping grid is the Footer area that has several buttons for continuing with processing after you are done with Mapping.

## **My Data File has Column Headings**

This setting was set on the previous screen, but you have the opportunity in the Header of this page to change the setting if the Mapping Grid is not displaying correctly.

The mapping grid is not displaying correctly if:

- You see data values in the left-most column of the Mapping Grid. If your file does not have a row of column headings, then uncheck the "My Data File has Column Headings" checkbox.
- You see names of columns in the second column of the Mapping Grid where you should see data. Your file actually does have a row of column headings, so check the "My Data File has Column Headings" checkbox.

## **The Transposed View of the Mapping Grid**

This may be slightly disorienting, but what you see in the Mapping Grid area is a transposed view of your source file. (Transposed means the table has been flipped so that rows have become columns and columns have become rows.) In other words, the column name headings that were at the top of each column of your data file are now listed down the left edge of the Mapping Grid. The second row in your source file, which has the first row of data, is now displayed vertically in column 2 of this grid. The third row of your source file (second row of data if you have column headings) is now displayed in column 3 of this grid. Even though they display as a column on this grid, to minimize confusion we will continue to talk about the "rows of data" as they appear in your source file. A reference to a column heading or column name refers to names at the top of the columns in the source file and which appear along the left edge of this Mapping Grid.

## **Navigating the Preview of Source Records**

At the top of the data preview columns are a pair of left-right navigation arrows that have the effect of scrolling through your source file's rows of data, row by row. If your data does not match the format of a mapped field, this preview will highlight the issues so you can correct the mapping or the data, as appropriate. Before you complete the mapping, it is sometimes helpful to page through several rows of data using the right arrow to see if you can spot any issues before proceeding further.

You do not need to page through your entire source file. Just view enough records to spot any obvious mapping issues.

## The Mapping Picklists

To recap, the left columns of this grid display the column names found in your source file plus a preview of rows of data found in your file. The next pair of columns are for mapping the data displayed on the left side of the Mapping Grid to the Tables and Fields available in the GiftWorks Cloud database. Within these two columns are pairs of dropdown selection tools that GiftWorks Cloud prefers to call "picklists." When you click on one, it opens so you can "pick" a value from the displayed "list." The first picklist is labeled "**Entity**" and the second is labeled "**Field**."

The **Entity** picklist is used to select a table record that will be created or updated in a GiftWorks Cloud table. In this dropdown, you can choose a Constituent table record, a related record in the Address Table, a related Phone record, a related e-Mail record, and also a related Donation, Group, Mailing List, Note or Relationship record. Once you have picked the table and record into which you want to post the data, the **Field** picklist updates to show the list of available fields into which you want to post the data found in this column of the source file. The process of connecting columns in your source data file to fields in tables in the GiftWorks Cloud database is called "Mapping" your data file.

## The best way to use the Mapping Screen...

We skipped over the settings in the heading area because you can start mapping your data file without setting them. If you happen to know your source file included columns with 2 email addresses and 3 phone numbers, you can go ahead and set those settings. The next page of this guide explains a bit more about how these settings work and what effect they have.

We suggest the best way to get started on this screen is to just start mapping your data beginning at the top of the grid. Go row by row down the grid, picking the appropriate **Entity** (Table record) and **Field** to put the data in. On a simpler import or one that is importing transactions instead of new constituents, you don't need to be concerned about the settings in the heading. If, as you go along, you have already mapped one email address and its related fields and have now come across another column of source data with an additional email address in it, then you know you need to be updating more than one child record in the eMail table, so continue to the next page to learn more about Requesting Multiple Field Sets and other special mapping considerations.

## 5) Multiple Field Sets and Special Mappings

## Requesting Multiple Field Sets

The settings in the header arranged in the sentence "" are used to add records and additional sets of fields for mapping. Up in the header, increase the count of emails from 1 to 2. As soon as you do that, you will see that the email fields you have already mapped have been renamed to be updating "email 1" signifying eMail table record 1. If you view the Entity dropdown, you will see that there are now two instances of new eMail records so you can proceed with mapping this next column and its related columns all as "eMail 2". As you continue on, you can increase the count of each type of child record as you find you need them.

In the header at the top are a set of four dropdowns for creating multiple sets of repeating fields. Specifically, you can set whether each row in your source file has columns that contain data for one or two Constituents. If left set with a value of "1," then by default any new records created would have a profile of "Individual" unless a column of Profile data is mapped to specifically set the desired profile. The other three dropdowns can be used to record up to three addresses, phone numbers and email addresses that are to be associated with each new Constituent.

If you increase the number of Constituents to 2, then you will find two full sets of Constituent fields that you can use to map source file columns to "Constituent 1" or "Constituent 2." As you increase the phone numbers and email addresses, the increase applies to each constituent. The treatment of these constituent records is determined by the Profile. If the count of constituents is 2 and no profile is mapped, then by default a Household profile will be created. Otherwise the mapped profile will apply. The Importer takes different actions based on the profile.

If the profile is Household, then the Importer will create three records and, if set, three relationships. A Household record will be created that will have associated with it all of the mailing addresses found in the import row setup as "shared" addresses. If a phone has a Type "Home", it too will be associated to the household record as a (landline) phone that is "shared" with all the household members. The advantage of shared addresses and phone numbers is that there is only one record that needs to be updated when a household moves and the records from all household members are automatically updated. A member of the household can be "unshared" from the household address so that person can have a separate mailing address; for example, a child that has moved away for college.

The Importer will also create two records having an Individual profile according to the fields mapped for Constituent 1 and Constituent 2. The remaining phones and eMail records are associated to each individual per the mapping. For the Household, the Importer will create a relationship between the Household and the two Individuals using the roles Household - Member. When the header is set for "2" constituents, the Entity picklist also includes that ability to map a relationship by setting the Role 1 for the role of Constituent 1 relative to Constituent 2 and Role 2 for the role of Constituent 2 relative to Constituent 1. These roles are pairs such as Husband - Wife, Brother - Sister, Father - Son.

## **Settings For Multiple Field Sets**

The Importer is designed to handle wide flat files, which means files that may have more than one mailing address, email or phone number per person and more than one person in a relationship. In the header of the Mapping screen are options to cause multiple sets of fields instances to be displayed for mapping. The sequence of these settings in the sentence seems a bit awkward, but accurately matches the flexibility in the software when it comes to setting up household records. Note that once these settings are increased from the default value of one, they cannot be decreased again. No harm comes from this other than there are more options visible in the field mapping picklists than you actually need to use. Scrolling through a longer list of mapping selections just takes a moment longer to map each column.

To become familiar with how these options work, we will first look at importing a file made up of individual people where there is only one person per row. Using the default values, the picklists are set up to import one person with no more than one e-mail address, one phone number and one mailing address. If your source file has more columns of information than this; for example, there are two column sets with telephone numbers, then just increase the count of phone numbers to two and a second set of fields for mapping phone numbers will appear in the dropdowns.

Simultaneously when importing constituents, you can specify permissions for each contact info

## **Import Columns titled Allowed to contact by Email, Address & Phone**

When importing, you can now import Columns titled Allowed to contact by Email, Address & Phone and set the rows within your document to be imported to 'Yes' and 'No' or 'Not Set', which GiftWorks Cloud will then recognize as 3 possible values during the mapping process. It will then go on to associate the set contact permission to the Constituent's profile, as shown here:

Diag. for mapping contact permissions:

Tools / Import

1 Choose Data 2 **Edit Mapping** 3 Select Keys 4 Review 5 Validation 6 Complete

### Import - Edit Mapping

COLUMN HEADING	ROW 1	ROW 2	MAPPING FIELD	IGNORE BLANK
Display name	John Smith		Constituent - Display Name	<input checked="" type="checkbox"/>
Email	test@gmail.com		Constituent - Email 1 - Email Address	<input checked="" type="checkbox"/>
Phone	4164164164		Constituent - Phone 1 - Phone Number	<input checked="" type="checkbox"/>
Post	2 Wood Street		Constituent - Address 1 - Address Line1	<input checked="" type="checkbox"/>
Allowed to contact by Email	Yes		Constituent - Contact By Email	<input checked="" type="checkbox"/>
Allowed to contact by Phone	No		Constituent - Contact By Phone	<input checked="" type="checkbox"/>
Allowed to contact by Post	Yes		Constituent - Contact By Post	<input checked="" type="checkbox"/>

7 out of 7 columns mapped. Mark unmapped fields as "Do Not Import."

Cancel Previous **Next**

## Mapping full and abbreviated State Names

When you have moved on to mapping process in the importer tool, GiftWorks Cloud accepts full and abbreviated state names as shown below:

As shown below, 'Address State' shows up as a mapped field. Mapping should happen on abbreviated and full State names.

If a match is found, GiftWorks Cloud will store the state irrespective of country.

## 6) Complete and Test Your Mapping

After you have worked your way down the list of columns and assigned as many as you wish to a table record and a field, there are a few requirements that must be met for a mapping to be considered complete.

### Ignore Blanks

First, there is one more column in the Mapping Grid to consider. It can be ignored if you are doing your first load of Constituents into GiftWorks Cloud. Its purpose is to assist you when grooming data and selectively posting updated information into fields. The box is called "Ignore Blanks" and by default it is checked for every field. This setting allows a record that is updating an existing record to have blank fields in the import file, and GiftWorks Cloud will assume that when a blank is found in the import file, the existing value in the field should be left unchanged.

In the few cases where blanks are included in a column by design, uncheck the Ignore Blanks box to have blanks in the imported data file remove data from the field.

## **The Magic of NULL**

GiftWorks Cloud also provides a "magic value" that can be placed in your import file for a column that will normally have blanks in it that should not delete existing data, and so the Ignore Blanks box remains checked. On a cell-by-cell basis, if you want existing data in the mapped field to be blanked out, use the magic value "NULL". Any place in the source file that you want a field to have the data deleted, import the value NULL and GiftWorks Cloud will delete the existing data, leaving behind an empty field. To work, include only the four-letter word, upper case, with no leading or trailing spaces so that it is an exact match. Conveniently, if your Excel formulas happen to produce NULL value messages, you do not need to edit the source file. All of the formula-produced NULL messages will post as empty/blank fields.

## **Setting Columns to "Do Not Import"**

To help you avoid accidentally skipping over a field, GiftWorks Cloud requires every column in your source file to either be mapped or marked "Do Not Import." Conveniently, a button is provided in the footer for quickly marking all remaining unmapped columns as "Do Not Import" in one click.

## **Required Fields**

Each record being created must meet the Required Field requirements for the table in which the record is being posted. A review of Appendix A will show the fields that are required for each of the major tables in GiftWorks Cloud. If a single field of a particular table has been mapped, then all required fields for that table must be filled in to create a record. To assist you, GiftWorks Cloud will warn you if a table has a required field that has not been mapped and a system-specified default value is not available. If a default value can be determined, then the field is no longer considered required from the perspective of the Importer. As a result, you can complete mapping without having several of the Required Fields specified in Appendix A mapped to columns in your import. For example, the child table that records phone numbers requires four fields to be filled in order to save the record, the Display Name (or First & last), the Phone Name, the Phone Type, and the Phone Number.

If your source file has a column of phone numbers in it, you may choose to map that column to the field Phone Number. By adding that mapping, GiftWorks Cloud will test whether all four required fields are mapped or filled with default values so the record can be posted. For related records, the Display Name (or First & last) that joins the Constituent record to the phone child record is filled automatically. It happens that if the field Phone Name is not specified, by default

it will be given the name "Phone 1." This is an example of a required field that does not need to be mapped because a default value will be provided by GiftWorks Cloud. If you have more than one phone number being imported, the names "Phone 2" and "Phone 3" will be assigned to the additional Phone table records.

In contrast, the Phone Type field does not have a useful default value that can be set in advance. For each imported phone number, we want to know whether it is a landline or a cellular phone and this categorization is considered a required field in order to make the new phone record more useful. Therefore, when you try to move on from the Mapping Grid, the system will alert you concerning Phone Type being a required field that has not been mapped.

### **All Done Mapping? Click [ Next ]**

When you click Next, GiftWorks Cloud will test your Mapping to make sure that:

- All Source Data File columns have been mapped or marked "Do Not Import."
- Required Fields are mapped; at this point it will not read through the file to see if columns mapped to a required field have blank values. (Record-by-record checking of required field data will be tested at a later step.)

## **7) Saving your Mappings**

### **'Save As' a Saved Mapping.**

When importing data from an external source, you can now select 'Save As' a Saved Mapping. GiftWorks Cloud will then take the saved mapping and offer it to you in the drop-down prior to importing the next time around. One point of note here is that you must specify a unique name for each saved mapping to proceed.

### **Overwrite a Saved Mapping**

Should you then choose to Overwrite a Saved Mapping, you may also do so within the Import Tool. First, you need to select an existing mapping from the available drop-down menu. You then have the option to make any necessary changes to the existing mapped fields, and you can then overwrite so that next time the mapping will include the new changes that were made to it. See below screenshot:

### **Load a Saved Mapping**

In addition to this, you can also select to Load a Saved Mapping after selecting your document to import from its location. So now prior to the mapping section, you can select a pre-existing Mapping that has been created and saved in the system. Should your new import document

have more or less columns than the original Saved mappings doc, GiftWorks Cloud will let you know and ask you how you wish to proceed. In this case you can choose to ignore the blank fields or manually map them yourself.

### **Save Mappings for re-use**

The Save Mappings for re-use feature allows you to either save a new mapping you have entered on your document, or alter a saved mapping you used and have it updated in the system.

When importing a file to be imported, you can now save mappings for re-use so that you need not map the same columns to the same fields all over again. You also now have the below attributes:

- You can specify a name and description at the start of mapping, so you can then save the mapping.
- Mapping is saved once you complete mapping the fields and go to the next action.
- Name is required to save the mapping but description is optional.

Should you choose to save the mapping without specifying a name, then you are not allowed to proceed and will be shown an appropriate message: "Please specify a name for the mapping you wish to save"

The following is saved for each Saved Mapping in the GiftWorks Cloud database

- o Name of the mapping
- o Description if available
- o Last used (current date-timestamp)
- o Last used by (current user "First Name + Last Name")
- o Created (current date-timestamp)
- o Created by (current user "First Name + Last Name")
- o Last Updated (current date-timestamp)
- o Last Updated by (current user "First Name + Last Name")
- o Number of constituents per record
- o Number of emails per constituent
- o Number of addresses per constituent
- o Number of phones per constituent

- o The mapping of each column to the constituent # and field of the constituent
- o In case of emails, the mapping of each column to the constituent #, the email # and the email field
- o In case of addresses, the mapping of each column to the constituent #, the address # and the address field
- o In case of phone, the mapping of each column to the constituent #, the phone # and the phone field
- o If blanks will be ignored for that column

When importing a file, should you want to load a saved mapping so that you need not map the same columns to the same fields all over again<sup>[CH2]</sup>

You can now see a list of mappings presented to you containing the below information:

- o Name of the mapping
- o Description if available
- o Last used (date-timestamp)
- o Last used by (user "First Name + Last Name")
- o Created (date-timestamp)
- o Created by (user "First Name + Last Name")
- o Last Updated (date-timestamp)
- o Last Updated by (user "First Name + Last Name")

As mentioned above, when you choose to load a mapping, if the number of columns in import file do not match that of the mapping, you will see:<sup>[CH3]</sup>

- o "Your file has less columns than this mapping. The excess columns at the end of this saved mapping will be ignored. Do you want to proceed?"
- o "Your file has more columns than this mapping. How do you want to proceed?"

§ Mark the extra columns as "Do not import"

§ I will manually map the extra columns

§ Cancel

Once you then load a mapping, if the data type in your file does not match the mapped field, the existing validation process should catch this and give you the above options to either proceed or cancel.

- The following information is loaded from the GiftWorks Cloud database when you select a saved mapping:
  - o Number of constituents per record
  - o Number of emails per constituent
  - o Number of addresses per constituent
  - o Number of phones per constituent
  - o The mapping of each column to the constituent # and field of the constituent
  - o In case of email fields, the mapping of each column to the constituent #, the email # and the email field
  - o In case of address fields, the mapping of each column to the constituent #, the address # and the address field
  - o In case of phone fields, the mapping of each column to the constituent #, the phone # and the phone field
  - o If blanks will be ignored for that column

### **Select to save a saved mapping that you previously loaded under a different name**

You can also select to save a saved mapping that you previously loaded under a different name so that you can re-use an existing mapping to create a slightly different mapping for use later on, should you wish to do so.

- In this case, when you load an existing mapping, you have the option to save it
- You can specify a name and description for the mapping at the start of mapping so you can save the mapping
- Mapping is saved once you complete mapping the fields and go to the next action
- Name is required to save the mapping but description is optional
- If you choose to save the mapping without specifying a name, then you are not allowed to proceed and are shown an appropriate message "Please specify a name for the mapping you wish to save"
- The following is saved:
  - o Name of the mapping
  - o Description if available
  - o Last used (current date-timestamp)

- o Last used by (current user "First Name + Last Name")
- o Created (current date-timestamp)
- o Created by (current user "First Name + Last Name")
- o Last Updated (current date-timestamp)
- o Last Updated by (current user "First Name + Last Name")
- o Number of constituents per record
- o Number of emails per constituent
- o Number of addresses per constituent
- o Number of phones per constituent
- o The mapping of each column to the constituent # and field of the constituent
- o In case of emails, the mapping of each column to the constituent #, the email # and the email field
- o In case of addresses, the mapping of each column to the constituent #, the address # and the address field
- o In case of phone, the mapping of each column to the constituent #, the phone # and the phone field
- o If blanks will be ignored for that column

### **Overwrite a saved mapping**

When importing a file, you can now overwrite a saved mapping that you loaded previously. This will allow you to edit and then save according to your new specifications, the details of which are listed below:

- Once you load an existing mapping, you have the option to overwrite it
- Mapping is saved once you complete mapping the fields and go to the next action
- The following details will be saved in the GiftWorks Cloud database:
  - o Last used (current date-timestamp)
  - o Last used by (current user "First Name + Last Name")
  - o Last Updated (current date-timestamp)
  - o Last Updated by (current user "First Name + Last Name")
  - o Number of constituents per record

- o Number of emails per constituent
- o Number of addresses per constituent
- o Number of phones per constituent
- o The mapping of each column to the constituent # and field of the constituent
- o In case of emails, the mapping of each column to the constituent #, the email # and the email field
- o In case of addresses, the mapping of each column to the constituent #, the address # and the address field
- o In case of phone, the mapping of each column to the constituent #, the phone # and the phone field
- o If blanks will be ignored for that column

### **View a list of saved mappings**

When you view a list of saved mappings to either review or manage it, you can see the following details:

- o Name of the mapping
- o Description if available
- o Last used (date-timestamp)
- o Last used by (user "First Name + Last Name")
- o Created (date-timestamp)
- o Created by (user "First Name + Last Name")
- o Last Updated (date-timestamp)
- o Last Updated by (user "First Name + Last Name")

- You can edit the following information

- o Name of the mapping
- o Description if available

- The following is updated when you edit information from the mapping.

- o Last Updated (current date-timestamp)
- o Last Updated by (current user "First Name + Last Name")

- You can also delete a mapping

Now that we understand the use of saved mappings, we are going to look at selecting Record matching keys in the import tool.

## 8) Select Record Matching Keys

With your mapping complete, GiftWorks Cloud tests whether enough information is provided to identify whether it can uniquely match an existing record to update it.

A Custom Field set as a foreign Key.

If this field is mapped, it will be used as a Key without further action on your part.

**Pro Tip** - If you have not made changes to data in the *Display Name* field as exported from GiftWorks Cloud, selecting it as the import Key will reliably match and update only one record.

Later in this import process, the import will be tested, and the system will report rows that fail to be importable because the Key or Keys set in this step are so vague that more than one record is matched and therefore GiftWorks Cloud does not know which record to update. The row of data will then be reported as "Failed to Import." If you find an excessive number of rows failing to import due to record matching, return to the settings made on this screen and select fields that will better isolate unique records.

## 9) Staging and Testing The Import

After completing the Mapping step and selecting Keys, if needed, GiftWorks Cloud proceeds to test your import. It does this by creating what are known as staging tables that gather the records in your database that will be created or updated by the import process. In the case of updates, if more than one record matches an import row, the row will be identified as Unable to be imported. For new records that will be created by the import, the test verifies that these records meet the validation requirements for adding new records to the Constituent table and each related child table in the GiftWorks Cloud database.

While the import is being processed to create staging records, no change is being made to your NPO's database. At the end of this staging and testing process, new records are ready to add to or overwrite the records in your database. More importantly, statistics are reported for the number of new Constituents that will be added to your database, the number of Constituent

records that will be updated, and the number of donation payment transactions that will be posted to the database.

The end of this test is your opportunity to go back and update settings in your mapping to improve the test results or to abort the import entirely.

If the test results are to your liking, click [ Next ] to proceed to commit the changes to your database.

**Competing Updates** - Note that during an import, once the staging starts until the import is finally committed, you should ask other users in your organization to not post changes to the database because their changes might be overwritten by the import.

## 10) Commit The Import

When you choose to Commit the Import, the staging table records are added to your NPO's database. This is an irreversible process; at this point your changes are permanent. Once again, GiftWorks Cloud will provide statistics concerning the changes that are being posted during this process and any errors that were encountered when overwriting existing records in your database with these staging records. Any rows in your source file that could not be imported are written to an Import Errors file that will be covered in the next page.

## 11) Download the Error File / Check Results

Conveniently, when GiftWorks Cloud processes each row of a source data file, either the software is able to apply the mapping settings and write the appropriate records to the staging tables that meet all of the requirements for posting records into the GiftWorks Cloud database, or it encounters errors. If an error is encountered that affects writing records to the Constituent table or any related child table, then the entire row of data is rejected and nothing is written to the staging table. This allows you to fix an issue in a column of your import data and re-run the import without risk of creating duplicate records.

If an error is encountered, the source data file's row of data that failed to import is written to a downloadable Import Errors file with a column added to your data that captures the error that was encountered. Conveniently, this file has only your problem records so you can focus your attention on solving the issues and re-importing just these problem records. (Unfortunately, at this time GiftWorks Cloud does not allow you to save your mapping so that you can reuse it again with this file and files from the same source, but that feature is high on the list of future enhancements.)

## 12) Split Long Complex Imports

Complex imports that are trying to create records in many tables at once can present special challenges, making sure you have the Keys and required Fields necessary to create all of the records you intend to create. First, try doing these imports in a DEMO account database to make sure your source file has all the columns it needs. Second, run a short 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 100 (duplicate your import file and delete all but the first 100 rows in one file and delete the first 50 rows from the second file so they are not imported twice.) Work on the mapping for importing just those 50 rows. Take a screen-print of your Mapping Grid to use as a reference. When you’ve got the mapping working, import the second file with the rest of the records.

## **13) Importing Households**

GiftWorks Cloud has a powerful feature that allows you to organize people living at the same mailing address into a Household such that the donation payments made by each person or entity within a household has their donations aggregated to report total donations for the household. Likewise, an Organization can aggregate the donations made by its members or employees. The aggregation, the adding together and reporting total donations made by related people, happens automatically whenever a Household or Organization is properly set up for aggregation.

The other benefit of using Households is to minimize the cost and improve the effectiveness of physical mailings by having the ability to choose to send one mailing that is addressed to an entire household, or to mail to each individual in a household but not both. To properly set up a Household, two things are required: First, that a record be designated as being a Household or Organization in the Profile field of the record; second, that one or more other records are identified as having a Relationship to this record that allows aggregation. You can both set profiles and create relationships using the Importer, and this can be done all in one import process or by using multiple imports.

In general, it easier to set up a Household with related Individual records by importing as a single row in your import data file with columns in the data that define the role of each person in the relationships.

## **14) Importing Households - The Easy Way**

We suggest creating a household and one household member in one import process with a file that has columns with the household details and a household’s members information in each row. When you import the file after the file selection process you will then select “2” constituent’s selection as shown below before moving to the mapping screen.

How many records are in each row?

This is usually one.

constituents, each with up to  address,  email address, and  
 phone number.

When you do this, you will then be presented with the Relationship options during the mapping process where you can select the below mappings for the data

- ∅ Relationship Role 1 Household
- ∅ Relationship Type Household
- ∅ Relationship Role 2 Household Member

When you do this the Household data in the row will be classified as a new Household to be created, the Household member will be attached to the new household and the type of relationship between the two will be classed as a Household relationship.

Where the relationship is not defined as shown above and the Importer is presented with two people in the same row of import data, it will assume that you want each of them to be created as individual records with an Individual profile.

If a row of import data has two people and also has address information, the importer will assume the address is the address of the household and that the address is "shared" with each person living in the household so that if the family moves, changing the household address will change the mailing address for everyone living in the household that shares the address.

Point of note: (You can "unshare" an address for when the kids move away for college and have an independent mailing address separate from the household address.)

Similarly, if a row of import data has two people and also has a phone number with *phone type* of "Home" it will be presumed to be a landline inside the house that is "shared" by all who live there until you choose to unshare it. Any other *phone type* is presumed to be personal to the person to whom you associate it. All email addresses are presumed to be personal to the person to whom you associate it unless it is assigned an *email type* of "Shared".

## 15) Moving from GiftWorks Desktop to GiftWorks Cloud

To better clarify what "two people in the same row of import data" means, users of GiftWorks Desktop need to know that one of the ways households were managed in the Desktop edition is no longer being used. For GiftWorks Cloud, we no longer place two first names in the First

Name field, such as "Jim and Mary," in order to identify a married couple in a household record. A migration service is available to migrate your data from Desktop to GiftWorks Cloud that will scan the First Name and Last Name fields to look for the "and's" and ampersands (&) in order to break out two separate first and last names and create the corresponding Individual records plus Household record. If you choose to bring in data from another source that similarly has the "and's" and ampersands (&) you need to prepare your data for import by separating the names out into separate First Name columns. Likewise for Last Names. Take a look at the chapter on Grooming Your Data for helpful Excel formulas that separate out names based on finding "and's" and ampersands (&) and other useful tips.

For the purpose of the Importer, "two people in the same row of import data" means that during mapping, columns will be matched up to the First Name and Last Name fields of two separate Individual records; in other words there are two first name columns and two last name columns and they will be mapped to create two related Constituent records. *(Note that during mapping, there is a selector at the top of the screen to tell the importer that there are two individuals in a row of data, so that you see the options to assign fields to a second person.)*

## **16) Setting the Household Profile**

By default, any single Constituent record created in GiftWorks Cloud is assumed to be an individual person, and so the record is created with a Profile of Individual. The profile may be changed in the record at any time, but it can also be set on Import by including a column in the import data table that has Profile data. In other words, a column in your spreadsheet with the heading "Profile" and with values of "Household", "Company", or "Individual". To make the typing simpler, the data can be abbreviated to "House", "Com" and "Ind" or even "H", "C", and "I". There are no settings that affect these abbreviations. To keep it simple, the software looks only at the first letter of the data in the field. If it finds "H" or "h" it treats it as a Household. If it finds "O" or "o" or "C" or "c" (short for Company) it treats it as an Organization. Any other letter remains the default value of Individual.

End of document.