Importacular for The Raiser’s Edge
# Table of Contents

Overview............................................................................................................................................... 4  
Installation for Self-Hosted Users (on premise) .................................................................................. 4  
Hosted by Blackbaud.................................................................................................................................. 4  
Activation.................................................................................................................................................... 5  
Entering Server Credentials (self-hosted users only) ............................................................................. 5  
Application Settings............................................................................................................................ 6  
Default Criteria Settings ...................................................................................................................... 7  
Data Source Settings ............................................................................................................................ 7  
Day to Day Usage...................................................................................................................................... 7  
Data Sources.............................................................................................................................................. 8  
File (CSV or Excel).................................................................................................................................. 10  
Mapping Guide.......................................................................................................................................... 11  
  Import to Constituent............................................................................................................................... 11  
    Field Settings ....................................................................................................................................... 12  
    Address Mapping............................................................................................................................... 20  
    Area Settings....................................................................................................................................... 21  
    Cloning Mappings............................................................................................................................. 25  
  Import to Gift.......................................................................................................................................... 25  
  Import Payments to Pledges and Recurring Gifts .................................................................................. 25  
  Import to Individual Relationships ......................................................................................................... 27  
    Cross Linking Relationships ............................................................................................................... 29  
    Area Settings....................................................................................................................................... 30  
  Criteria Sets............................................................................................................................................ 31  
  Import to Organisation Relationships .................................................................................................... 32  
  Import to Participants ............................................................................................................................ 32  
  Import to Education Relationships ......................................................................................................... 33  
    Area Settings....................................................................................................................................... 33  
  Import to Banks and Financial Relationships ....................................................................................... 34  
  Import to Actions................................................................................................................................. 37  
  Import to Volunteer ............................................................................................................................. 38
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import to Prospect/ Proposal</td>
<td>38</td>
</tr>
<tr>
<td>Import to Membership</td>
<td>38</td>
</tr>
<tr>
<td>Import to Solicitor/Canvasser Relationships</td>
<td>42</td>
</tr>
<tr>
<td>Advanced Importing</td>
<td>43</td>
</tr>
<tr>
<td>Scheduled Imports</td>
<td>43</td>
</tr>
<tr>
<td>Importing Recurring Gift or Instalment Schedules</td>
<td>43</td>
</tr>
<tr>
<td>Coming soon</td>
<td>47</td>
</tr>
<tr>
<td>Avoiding Duplicates</td>
<td>48</td>
</tr>
<tr>
<td>Type of Constituent</td>
<td>49</td>
</tr>
<tr>
<td>Biographical</td>
<td>50</td>
</tr>
<tr>
<td>Address</td>
<td>51</td>
</tr>
<tr>
<td>Other</td>
<td>53</td>
</tr>
<tr>
<td>Review Data</td>
<td>55</td>
</tr>
<tr>
<td>Action To Take</td>
<td>56</td>
</tr>
<tr>
<td>Match Quality</td>
<td>57</td>
</tr>
<tr>
<td>Match In Grid</td>
<td>58</td>
</tr>
<tr>
<td>Matched Constituents</td>
<td>58</td>
</tr>
<tr>
<td>Filtering and globally updating the grid</td>
<td>59</td>
</tr>
<tr>
<td>Viewing and Editing Values</td>
<td>60</td>
</tr>
<tr>
<td>Validating and Importing</td>
<td>62</td>
</tr>
<tr>
<td>Advanced Settings</td>
<td>65</td>
</tr>
<tr>
<td>Managing Templates</td>
<td>65</td>
</tr>
<tr>
<td>Export, Import and Delete</td>
<td>65</td>
</tr>
<tr>
<td>Backup and Restore</td>
<td>65</td>
</tr>
<tr>
<td>Clone for file</td>
<td>65</td>
</tr>
<tr>
<td>Security</td>
<td>66</td>
</tr>
<tr>
<td>Security Settings</td>
<td>66</td>
</tr>
<tr>
<td>Acceptable Date Formats</td>
<td>69</td>
</tr>
<tr>
<td>Resources</td>
<td>71</td>
</tr>
</tbody>
</table>
Overview

Importacular allows Raiser’s Edge users to seamlessly import data from a variety of sources by directly integrating with the online applications and systems you use everyday. Use spreadsheets and .csv files without having to reformat your data. Pull details directly from sites such as Eventbrite, JustGiving and many more.

Installation for Self-Hosted Users (on premise)

When you download Importacular from Zeidman Development and unzip the compressed file, there are two applications to be installed and one utility to help you determine what to install:

- The “Do I Need The Server Install” application tells you whether or not you need to run the server installation.
- Zeidman Development Universal Server Installer – installed on the server and only run once in order to set up the server. This should be run by the administrator.
- The main Importacular installer.

Start by running the “Do I Need The Server Install” application. This should be run on a regular workstation as a regular user. It will tell you whether or not you need to run the server setup or not.

If you are instructed to do so, run the server setup. This should be run by the administrator.

Then run the main Importacular installer.

In general the installation is straightforward. In each case run the setup.exe file and follow the wizard.

Please ensure that The Raiser’s Edge and any other programmes are closed before starting your installation.

WHEN UPDATING AN EXISTING INSTALLATION YOU DO NOT NEED TO RUN THE SERVER INSTALL. UNLESS YOU ARE MOVING DATABASES.

Please download instruction for the Zeidman Development Universal Server Installer from our website: http://www.zeidman.info/downloads/ZDUniversalInstaller.pdf

Hosted by Blackbaud

If you are hosted by Blackbaud you should be able to find Importacular in your plug-ins area right now. Please do get in touch if you can't see it immediately. You’ll need to create an account in our ZeidZone to activate Importacular.
Activation

You need to first click on Activate Importacular. This will prompt you to enter your ZeidZone username and password.

Activation will register your copy of Importacular with Zeidman Development. The process sends your organisation name and Raiser’s Edge serial number to our secure servers. This generates a registration code that is unique to your installation.

Entering Server Credentials (self-hosted users only)

If you were prompted to set up the server credentials, the first time that you process an import you will be prompted for the connection details that you created in the server setup as shown below: If you were told that no server setup was required then you will not see this screen.
Enter the SQL server credentials that you set up on the server in order to continue.

Note that you can also set these values by pressing the ZD logo on the main Importacular menu to bring up the About box. Under the advanced menu select “Setup SQL Credentials” to bring up the above screen.

**Application Settings**

When validating an import, no records are created. This is not a problem when validating a constituent record but when validating a child record that must be associated with a constituent the constituent must exist.

The application settings screen is used for setting up a dummy constituent for use when validating relationships and other records that require a constituent to have already been saved.
Default Criteria Settings

Criteria Settings are used to look up existing records in Raiser’s Edge before importing. Each mapping template has criteria sets associated with it. You are also able to change the default criteria sets that affect new templates when they are created. They can then be edited per template. For more info on this please see area ‘Avoiding Duplicates’ in this document.

Data Source Settings

In order for Importacular to “talk” to external data sources it needs to know your API key or you may have to authenticate the data source so that it allows Importacular work with the web application. See each data source FAQ here for further details.

Day to Day Usage

The file data source and Constituent and Gift data destinations are available to free users, all other sources and destinations can be purchased by contacting development@zeidman.info.
Data Sources

The main home screen gives you the current data sources that are available. Note that the available data sources may differ from the image above.

Select a data source to continue, see each data source FAQ here for specific information on bringing in data, for all sources once the data has been loaded you should follow the below procedure.

Once data is selected click ‘start’ and the below screen will appear.
With each data source you will need to create your mapping template based on the data you wish to import. You get access to import into the constituent, address and gift fields for free.

Click on the plus symbol, and choose a name for your mapping template. You can have many different templates for different events, forms, email lists etc.

You can now map data to different areas of RE using the tabs provided. See the mapping guide on page 20 for full details.

You also need to create a control report, this will show any errors in the import.

Choose to create queries of new and updated constituents and exceptions for review later.
Finally if you have already purchased Audit Trail or Validatrix from Zeidman Development you can ensure all changes are tracked on import and subjected to existing data rules before committing changes. Find out more about Audit Trail and Validatrix [here](#).

**File (CSV or Excel)**

To start working with a file based data source, press the start button and you will be prompted to select a file as shown below.

![Select Import Form](image)

Press the binoculars to select a CSV or Excel file. For Excel you can also select the worksheet to import from.

For more details on connecting to any of the listed data sources and importing your data see [the data source FAQ here](#).
Mapping Guide

Import to Constituent

Either select an existing mapping or create a new one.

To create a new one select ‘add new mapping’ and choose between, individual, organisation or combined. You will now be shown a grid where you can choose which RE fields should map to your source fields. Any field names that are identical will match automatically but you can edit these in the table if you wish.

1 You are able to import a mixture of individual and organization constituents in the same way as you would in a regular Raiser’s Edge import. In this case you need a field that determines the key indicator (a value of “I” or “O”) in the data source.
You can choose to set a default value for certain fields. For example if you don’t ask for address from a data source you can choose to mark all records imported as ‘no valid address’.

Fields that are marked as required should either be mapped or a default value should be given for them. In the example above Surname (Last name in the US) is a required field as it is in RE. You must either map a field from the source or enter a default value in the default value column. Your organisation may have made other fields require in which case they will also be shown as required.

**Field Settings**

Field settings apply to the specific field mapping. The options available will vary depending on the type of field you select.

**Updating or creating specific fields**

For this field you may want to only update existing constituent records or only add the value to new constituent records. For child record such as phones, addresses, notepads etc, you can also select whether or not you want to update the field on new or existing children. In the example below the phone number will be added to both new and existing constituents.
and it will be added to new phone records or update existing (matched) phone records. Select the checkboxes accordingly.

**Correct Case**
You can also correct user entry errors before they reach your database using the settings for each field. The following options are available:

- Make all incoming text in a field **UPPER CASE**
- Make all incoming text in a field **lower case**
- Make all incoming text in a field **Proper Case**
**Data Transformations**

You can also dynamically change source data so for example if you use short codes for states/counties you might change all ‘New York’ to ‘NY’ as shown below.

![Text Casing](image1)

Or for pay method on a gift where the incoming value is the type of credit card, we may want to transform it to “Credit Card” like this:

![Custom Changes](image2)

We have mapped the incoming “Credit Card” field to both Credit Type and also to Pay Method. However with Pay Method we transform the value.
Catch All

In some cases you want to transform a set of values and any other values that do not match you want to set to a “catch all” value. This is useful, for example, when you have a default value e.g. for country you may have UK -> United Kingdom, USA -> United States, etc. and any other should go to United States.

Another use is where the field is being used by many types of value. For example there may be an event field for email actions consisting of values such as unsubscribe_click, read, open, forward etc. When mapping to a communication preference attribute you only want the unsubscribe_click to map to the attribute description of Unsubscribed. All other values should be blank. (For attributes this means they will not be added). This is shown below:
Only one row in the grid can be a catch all. The “From Source” cell is disabled for that row.

**Date Transformations and Dynamic Dates**

When a date field is selected on a mapping the option will be added to the field settings, allowing you to transform the incoming date format and also to specify dynamic dates instead of a fixed date.

In the screenshot below, the incoming date is formatted as “Year-Month-Day” e.g. 2017-12-02, but Raiser’s Edge wants the date to be in a local format. Typically in the US this would be 12/02/2017 or in the UK 02/12/2017. This transformation will change the incoming date into the format that RE expects it to be in.

The dropdown shows you a number of different alternatives but if the incoming format is not present then you are able to select “Enter you own format”. See *Acceptable Date Formats* for more information.
You can also choose the current date and plus/minus any number of days, months or years.

Please note that you still need to enter a date in the default area or map the field to an existing one otherwise it will not show up in the review screen.

When it comes to reviewing the data in the review screen later on this will populate it with the correct value based on the current date.

However, please be aware that these options will only be available for actual date fields such as gift date or attribute date, other fields that contain fuzzy dates will not have these options. This includes birth and deceased dates.
Add code table entries / Make inactive entries active
When you map your data and a drop down field is selected, a new field setting option is added. Similarly to the date field outlined above. If selected, the user is able to automatically add the table entry to the system or make an existing inactive table entry active.

Please note that you will need to have the rights to do this. This only works on code tables that are editable. Therefore, it will not work on dropdowns such as pay method or gift type as these have a fixed list of entries.

You are also able to ignore values that are not in the codetable. Instead of creating an exception these will simply not be added to the record.
Proportional Amount Options

When the field you select is a number e.g. the gift amount, you are given the option to use a proportion of the amount, rather than the full amount. This is very useful for gift splits, but also for event fees and donations.

Once you have mapped an area and saved it the area will be shown as below.
Address Mapping

For each area you wish to import into, you will need to map each distinct field in The Raiser’s Edge. Address mapping follows a similar procedure to constituent mapping. As it is possible to have more than one constituent mapped per row you need to select which constituent to associate this address with. For example you may have the primary constituent, their business, their spouse, etc.

In the mapping screen, as well as giving the area a name, you also need to supply the “parent” of this area mapping. In the case of an address this will be a previously defined constituent mapping. Shown below you are able to select from Constituent, Spouse or Business which have been previously defined.
The same is true of other areas such as notepad, attributes and phones/emails.

**Area Settings**

As well as field settings described earlier, there are also area settings that affect how you work with each of the area. For the most part these are settings that allow you determine the match criteria for the child record. For example, should you overwrite a matching address, always create a new address or always update the preferred address? Equally how should you handle attribute matching and phone matching.
You access the area settings from the settings column as shown above.
The first setting above allows you to determine whether or not this address will be used for looking up constituents. If you are positive that this address is new and will not be in RE then you can untick this and the lookup process may be quicker. Note that if you have address in the criteria sets and there is no other address set to lookup the record by then it will not be possible to untick this box.

The address settings shown above allow you to decide how you match on existing addresses:

- Always add the address even if there is a matching address on the record
- Add a new address only when no existing match if found but update the matched address. (This will update other areas that are not used for the matching such as unchecked match fields as well as other fields such as from date, etc)
- Just overwrite the preferred address with the incoming address. (This is useful where you only want one address and are assured that the incoming address is most reliable)
- Only add new addresses and do not update matched addresses. This is useful where you do not want to update other non-matching fields such as those that are unchecked or other fields like date from.

The second tab lets you decide the criteria for a blank address, so when looking for matches it won’t match on blank addresses. This is useful because for some organisations the country is almost always the same and may be a default value. You would not want to add just the
country if all the other fields are blank. This may be the same for address type which is often defaulted but possibly other fields too.

There are a number of area settings that work in similar ways including attributes, phones and education.

**Cloning Mappings**

Once you have created a mapping you can clone it by simply right clicking on the mapping and selecting 'duplicate’. This may be useful if you have a number of additional relationships records with the same attributes, phone and address settings etc.

This will add an additional mapping line with all the same settings so you can edit only the areas needed rather than crating it from scratch.

**Import to Gift**

You will need to set up mappings for each different area you wish to import into and link it to a constituent mapping.

If you want to import a gift with bank details e.g. for EFT or direct debit transactions then you will need the bank and financial relationships data destination. See Import to Banks and Financial Relationships for more details.

It is now also possible to filter the fields that are shown for mapping. There are very many gift fields. When choose the common fields with scheduling fields the schedule wizard can be started. See Importing Gifts with a Schedule for more information.

Currently gifts are imported directly on to a batch, which will need to be committed following the import of data.

**Import Payments to Pledges and Recurring Gifts**

This optional module is accessed via the gift area settings. An incoming gift can be set up to apply itself to a pledge or recurring gift. When using The Raiser’s Edge regular gift import you need to specify the import id of the pledge or recurring gift that you wish to link the payment to. This is not always possible so Importacular gives you other options.
You are able to decide whether to pay a pledge or recurring gift. You should then decide which mechanism you want to match. The choices are:

- **First found** – Importacular recognises that at many organizations there is only one pledge or recurring gift on a constituent record so the payment should be applied to the first one found. That being said if more than one is found it will be applied to the first that has an active status.
- **Gift Attribute Description** – When selecting this Importacular will attempt to match an incoming attribute description with the corresponding value on a constituent record. When selecting this option you also need to select an attribute category from the second dropdown (as is seen in the example above).
- **Reference** – Importacular will attempt to match a value mapped to the reference field with a value on the pledge or recurring gift reference field.
- **Reference Number** – As with Reference Importacular will attempt to match against the reference number field. Note that this field only appears for specific pay methods. The pay method of the incoming payment need not be the same.

Note that in each case other than the first the incoming value to match on must be mapped to the same field as the lookup field. It is not necessary to actually add the value to the record. This can be achieved by going into the field settings and unchecking the relevant box as shown below.

---

**Import to Individual Relationships**

As with the other areas, you will need to set up mappings for each different area you wish to import into and link it to a constituent mapping. For relationships (both individual and organisation) you are able to specify which type of relationship should be created; either a constituent or non-constituent. On adding a new individual mapping you will be prompted for the type...
When you select a constituent relationship, as well as Importacular adding an individual relationship area mapping to the individuals tab, it also adds a “virtual” mapping to the main constituent tab. This is shown below.

With the virtual mapping (shown above with the name “Constituent_Spouse”) you are able to add other constituent mappings to it.

This is can be used when you would like to add a gift to the spouse record as well as (or instead of) the main constituent record or, for that matter, would like to link any constituent data to the new constituent relationship record.

In any event mappings that appear on both constituent and relationships records can be added as you would with the constituent record e.g. if you want to add a phone to a relationship record you would simply select the relationship mapping to import with instead of the primary constituent. This is shown below:
Cross Linking Relationships

Some imports may have many individuals related to the primary constituent, but also with each other, for example in a family. You may want to create relationships between each of the family members in addition to their relationships with the primary constituent.

You can do this by creating a mapping for each relationship but to speed this up you can use the cross linking relationships.

In the Individual or Organisation mapping tab select ‘Mapping’ and choose ‘Cross Link Relationships’ from the drop down.

The below box will appear listing all the individuals. Select those you wish to link.
Click ok and all the linked relationship mappings will be created. You may wish to go in and select relationships and reciprocals for each one within the created template.

<table>
<thead>
<tr>
<th>Mapping Name</th>
<th>Area Type</th>
<th>Count</th>
<th>Linked To</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indi Constituent</td>
<td>Individual</td>
<td>4</td>
<td>Constituent</td>
<td></td>
</tr>
<tr>
<td>Partner Of Ind 1</td>
<td>Individual</td>
<td>6</td>
<td>Constituent</td>
<td></td>
</tr>
<tr>
<td>Child 1</td>
<td>Individual</td>
<td>6</td>
<td>Constituent</td>
<td></td>
</tr>
<tr>
<td>Child 2</td>
<td>Individual</td>
<td>6</td>
<td>Constituent</td>
<td></td>
</tr>
<tr>
<td>Child 3</td>
<td>Individual</td>
<td>6</td>
<td>Constituent</td>
<td></td>
</tr>
<tr>
<td>Indi Constituent - Child 1</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Indi Constituent</td>
<td></td>
</tr>
<tr>
<td>Indi Constituent - Child 2</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Indi Constituent</td>
<td></td>
</tr>
<tr>
<td>Indi Constituent - Child 3</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Indi Constituent</td>
<td></td>
</tr>
<tr>
<td>Child 1 - Child 2</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Child 1</td>
<td></td>
</tr>
<tr>
<td>Child 1 - Child 3</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Child 1</td>
<td></td>
</tr>
<tr>
<td>Child 2 - Child 3</td>
<td>Individual (Linked)</td>
<td>2</td>
<td>Child 2</td>
<td></td>
</tr>
</tbody>
</table>

**Area Settings**

As with other areas, you are also able to determine how an individual relationship record is processed if a match is found.
Criteria Sets

As with constituents individual relationship records can also be looked up using criteria sets. These will vary depending on whether or not you have selected a constituent or non-constituent relationship record.

Currently gifts are imported directly on to a batch which will need to be committed following the import of data.

See the Avoiding Duplicates section later in this document.
Import to Organisation Relationships

Organisation relationship records work almost identically to individual relationships.

Import to Participants

Importing to participants works in a similar way to the other areas. Importacular only allows you to create constituent participant records at the current time. You must therefore link to an existing constituent mapping.

Importacular assumes that there can only be unique constituents in an event (This is a Raiser’s Edge configuration which by default prevents the same constituent being added multiple times to an event)

Note that when adding a participant link to a gift or adding participant donations the mapping screen is slightly different. Firstly you are only able to do this if you add a gift mapping.

In the mapping screen you specify which gift to apply this link to as shown below:
Also note that this link will only appear once the gift batch in Raiser’s Edge has been committed.

It is now possible to add guests to participants for an event. Guests rely on the fact that there is already a participant mapped to act as host.

Currently guests are looked up in one of two ways. If a constituent id is mapped then the guest will be created from that constituent and added to the event. Otherwise the application will look to see if there is a non-constituent participant with the same first and last name in the event. If it cannot find this participant then it will create a new non-constituent participant and make it the guest of the mapped participant.

**Import to Education Relationships**

Education relationships behave in a very similar way to the other relationship records.

**Area Settings**

Area settings are used to determine what happens when a match is made with an education record and how that match is made.
Import to Banks and Financial Relationships

In order to import a financial relationship for a constituent there must also be an associated bank. This bank can also be imported or it can already exist. In any event the bank must be found by Importacular.

---

2 There is a lot of inconsistency in RE around banks and financial relationships. Because Importacular takes the labels that appear in RE, unfortunately some of the inconsistencies will also be transferred to Importacular. For the sake of this documentation, we refer to the bricks and mortar company as the “Bank” and the account that a constituent has at that bank as the financial relationship.
On the Bank tab you are able to create a bank mapping irrespective of whether or not there are any constituent mappings. A financial relationship can only be created when there is both a bank and a constituent mapped.

Press on the bank's area settings in order to determine which fields should be used to look up the bank in RE.
Note that this screen will differ depending on which country version of RE you are using. This is the UK version with the sort code. The US version will have the transit/routing number and the Canadian and Australian version will have their respective terms for a code that represents the bank.

In these settings you decide how to match an existing bank in RE.

Once you have mapped a bank you can map a financial relationship. In the financial institute column (i.e. the bank) you would select your newly mapped bank.

This record also has settings to determine whether or not the financial relationship already exists for the constituent with the bank.
Normally it would be sufficient to look up the financial relationship by the bank only. However it may be that a constituent has two relationships with the bank using different account numbers. If this is the case then you can also search for the bank using a combination of the bank and the account number.

**Import to Actions**

Actions behave in a very similar way to the relationship records.
Import to Volunteer

Volunteer mappings are simply an extension of the main constituent mappings. There are area settings for most of them to determine whether or not a volunteer entry should be added or updated.

Import to Prospect/ Proposal

Similarly to Volunteer mappings, the Prospect/ Proposal mapping follows the same pattern as the main constituent mappings outlined above.

Import to Membership

Membership records can be created or updated for both new and existing constituents.

The first thing you will need to do before you start importing memberships is to determine the membership settings order. This way Importacular will compare the incoming value against the existing value in RE and know if a change in membership is an ‘upgrade’, ‘downgrade’.

Go to ‘File’ then ‘application settings’ in the top left menu bar, select the membership tab and order your membership levels numerically. The lowest membership level should have number 1, increasing to the highest.
You can also select how to assume a payment for the same level of membership is a renewal based on the number of days prior of the renewal date the payment is made.

Importing to membership works in a similar way to the other areas. In order to create a membership you must link it to an existing constituent, this can be the main constituent but you can also add membership cards to individual or organisational relationship records too.

When you set up a membership, under membership type and renewal type there are a number of options. You are able to explicitly select whether or not the import is a renewal, a
join, a drop or a rejoin (if the membership is currently dropped). If it is a renewal you can select whether it is at the same level, an upgrade or a downgrade. However more often than not you will want to select “automatic”. This will enable Importacular to determine what the types are based on the incoming data and the existing values on the membership. This will change the membership where a match is found based on the hierarchy you created in the membership settings above. So it will determine if a membership renewal or payment is a same renewal, upgrade, downgrade and whether the type is join, renewal or rejoin based on your list. The automatic processing will *never* drop a member.

When you have set up the membership mapping click on the settings slider to the right of the mapping as shown here

![Membership Mapping](image)

This will open the below window
You can now select how to deal with multiple memberships and choose how a match should be made.

In the case of membership, the RE business rules can prevent you from having multiple memberships. In the case above this is the reason that the “Always add a new membership” radio button is disabled.

Where multiple memberships are allowed, you can set the match criteria. It is possible that there will nevertheless be multiple matches made. In this case the priority order is used to determine which membership should be updated.

You can also create mappings for membership benefits, cards and attributes; in addition you can link the membership to a gift in the import and a solicitor (these mappings will need to be set up first to allow the link).
Import to Solicitor/Canvasser Relationships

Assigned Solicitor relationship records are connected to two constituents one of which is marked as being a solicitor (although it is entirely possible that they are both marked in that way)

In Importacular we need to first map to a constituent that is a solicitor and then once that has been done we map the assigned solicitor record to the primary constituent that we are importing and also to the newly mapping solicitor. This is shown below:

The first mapping is the constituent solicitor. This mapping is treated in exactly the same way as a regular constituent mapping. You are able to select whether it is an individual, organization or a combined import. You use the same criteria sets to look up the constituent. The only difference is that the Is Solicitor check box is automatically checked without the possibility to uncheck it.

For the purpose of this document when referring to solicitor we also mean canvasser in the UK
The second mapping is the relationship. You select the linked with as the newly mapped constituent solicitor and fill out any other fields as shown below:

Advanced Importing

Scheduled Imports

This is a paid for module that enables you to import data from the data destinations that support scheduling without any user interaction. We have an entire document dedicated to this area of Importacular so please take a look on our website here.

Importing Recurring Gift or Instalment Schedules

When mapping gifts it is possible to restrict the fields shown. By default Importacular only shows the most common fields. However if you are importing gifts that require a schedule
e.g. pledges with instalments or recurring gifts then when selecting the “Show Common and Scheduling Fields” filter option the Schedule Wizard button appears as shown below.

We realise how difficult it is to import a schedule into RE using the built in import tool. It is not very intuitive when deciding which values should go into which columns. The schedule wizard assumes that all values are being defaulted. If, however the data source determines the schedule you will need to adjust the columns accordingly.

The schedule wizard changes depending on the frequency. In this overview we will look at the two most commonly used schedules; monthly and annually.

The wizard follows the same format as when you press the schedule button on the gift. The above schedule is for monthly. Below is for an annual schedule.
When pressing OK the mapping screen is populated with the default values. This is for the annual schedule:

- **Credit Type**
- **Date**
- **Date 1st Pay**
- **Installment frequency**
- **Instruction type to send**
- **Schedule day of month**
- **Schedule day of month 2**
- **Schedule ending date**
- **Schedule month**
- **Schedule monthly day of week**
- **Schedule monthly ordinal**
- **Schedule monthly type**

And for the monthly schedule:

- **Credit Type**
- **Date**
- **Date 1st Pay**
- **Installment frequency**
- **Instruction type to send**
The wizard assumes that all the values will be defaulted. However if the data source provides values then you may need to transform them. For example if the data source supplies the number of months for the instalment frequency e.g. 1 for monthly or 12 for annually then you will need a transformation on the Instalment Frequency field as shown below:

<table>
<thead>
<tr>
<th>Schedule current</th>
<th>Schedule day of month</th>
<th>20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule day of month 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule ending date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule month</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule monthly day of week</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule monthly ordinal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule monthly type</td>
<td>Specific Day</td>
<td></td>
</tr>
<tr>
<td>Schedule semi-monthly day type 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule semi-monthly day type 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule spacing</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Schedule weekly day of week</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Coming soon

Soon you will be able to import into the Tribute area of RE too.
Avoiding Duplicates

In order to determine constituent matches you are able to set up lookup criteria sets. We supply default values but if you want to fine-tune the lookup process you can do so at this point. This is especially relevant if you do not expect there to be any physical address details supplied but only email address.

Access these settings from the criteria sets menu.

Click here to skip this section.

For each criteria set you create you can specify how good a match it is. This is useful when you review the data, as you are able to tell whether or not a match was exact, good or poor. For example in line 2 above, we have specified that an email match is an exact match. However if you know that you have duplicate emails in RE you may want to make this a good match instead.

To create your own press the plus symbol. To edit an existing criteria set double click the row or press the pen symbol.
The screen above appears and gives you very many different options to choose from.

**Type of Constituent**

- It is possible to limit your search to either individual or organisation records only, or to include both, by selecting the appropriate radio button, shown below:
### Biographical

<table>
<thead>
<tr>
<th>Match On</th>
<th>Number of characters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>All</td>
</tr>
<tr>
<td>Title</td>
<td>All</td>
</tr>
<tr>
<td>First Initial</td>
<td></td>
</tr>
<tr>
<td>Surname</td>
<td>All</td>
</tr>
<tr>
<td>Maiden Name</td>
<td>All</td>
</tr>
<tr>
<td>Organisation</td>
<td>All</td>
</tr>
<tr>
<td>Surname/Org Name Aliases</td>
<td></td>
</tr>
<tr>
<td>Spouse</td>
<td></td>
</tr>
<tr>
<td>Ignore spouse match when main match found</td>
<td></td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Import Id</td>
<td></td>
</tr>
<tr>
<td>Constituent Id</td>
<td></td>
</tr>
<tr>
<td>NIN</td>
<td></td>
</tr>
<tr>
<td>Class Of</td>
<td></td>
</tr>
</tbody>
</table>
• Select the fields to match on. Note that the more fields that are matched on, the less likely it is to find a match. However in such a case if a match is found, it is more likely to be a positive match.

• Where appropriate it is possible to select the number of characters to match on.

• For surname/last name, organisation and maiden name it is possible to match on a soundex value. Soundex functions calculate a number for each combination of letters so that the name “Zeidman” would have the same value as “Zidman”.

• For first name it is also possible to search the first name equivalents. For example a first name equivalent may have been set up for a constituent “Robert” so that if the names “Rob”, “Bob” or “Bobby” for example, are in the file the constituent “Robert” will be found.

• The ‘Surname/Org Name Aliases’ tick box will check any aliases that may have been entered for an individual or organisation.

• The ‘Spouse’ tick boxes allow you to use spousal information as an identifier in the search. If you check this box then you are also offered the option to ignore spousal matches if the main record you are searching for is found. E.g. A household may consist of Jenny and Jim Smith (main constituent and spouse respectively). If you are searching on initial and address then both matches will be found. However if the ignore spouse tick box is ticked Jim’s match will be ignored.

• The Date of Birth tick box will match fuzzy dates both in the file and on the record. For example there will be a match if on the file the date is “03/01/1967” and on the record there is a date “1967”. There will also be a match if the reverse is true and in the file the date is “1967” but on the record the date is “03/01/1967”. Note the date format used is the same as the Windows settings. The fuzzy date rules are the same as in The Raiser’s Edge.

• If you have unlocked the education data destination in Importacular then you are also able to lookup by Class Of to search for constituent in a specific year group.

Address

4 You are able to add and edit first name equivalents from the home screen, click on the Zeidman Development logo to bring up the about box. Under the advanced menu select “First Name Equivalent Values” and then “Setup”. This will bring up a screen that will allow you to add new equivalent values and edit existing ones
• If you have mapped the ‘Address Line 1’ field, then the ‘Use address equivalents’ tick box is enabled. This allows you to match on address abbreviations that may exist within your database. For more information on viewing and customising the address equivalents see Advanced Options later in this document.

• The screenshot is from the UK and international edition. In the US and Canada edition county is replaced with state and with province respectively.

• It is possible to expand or limit your search to either half or the whole of your postcode, by checking the ‘All’ or ‘First half only’ option buttons. You can also compare the postcode by removing any spaces (UK, Australian and Canadian versions only).

• The ‘Email’ tick box will check all telephone types in Raiser’s Edge that have been designated emails. This is found in Config when you edit the phone type code table entry.

• The ‘Telephone’ tick box will compare any telephone type that has been designated a telephone, a fax or other. The phone number in the file will be stripped of any character other than a number. The comparison, however, will be against all fields stripped of the following characters: ( ) . — and any spaces.⁶

---

⁵ You are able to add and edit address line equivalents from the home screen, click on the Zeidman Development logo to bring up the about box. Under the advanced menu select “Address Equivalent Values” and then “Setup”. This will bring up a screen that will allow you to add new equivalent values and edit existing ones.

⁶ The reason that there is a difference between what punctuation is removed is due to the techniques used. The field in the file can be stripped of all but numbers much more efficiently than can every field in the database.
Other

- The collation is the way in which the database treats text. The entries consist of alphabet types and methods of comparison and sorting. In the majority of cases the default collation will suffice (it will search the same way as The Raiser’s Edge searches). However by selecting one of the alternatives it is possible to make the search case sensitive or accent insensitive. For more information speak to your organisation’s network or database administrator.

- The ‘Maximum matches’ figure allows you to limit the number of matches per record in your search file. Therefore, if there are many duplicates in your database or multiple matches are found for your given criteria, you can limit the number of results returned in the Output file.

- If the ‘Do not compare blank values in the file’ tick box is ticked then the lookup will not attempt to compare a blank value in the file with a value on the record. If it is ticked then any blank value in the file will only be a match if there is also a blank
value on the record. For example, when the tick box is ticked, if no first line of the address is given in the file then for there to be a match the address block should also be blank. However if it is not ticked then the record will match no matter what the value is in the address block, blank or otherwise.

- The final function in this section is 'Filter'. This allows you to filter the search within your database to a query of constituents, specific Constituent codes and/or Constituent attributes. If you click on the 'Filter' button the following screen will appear:

You can select a query of constituents that will filter the results. Only the results appearing in the query will be matched against the criteria.

- Here, you have access to your full table of Constituent Code entries and Constituent Attribute entries. Using the arrows you can select as many or as few as you wish to filter on.

- When you have selected the appropriate filters, click on 'OK'
When the criteria set has been created press ‘OK’ to add it to the list of criteria sets to be used for this lookup.

Please note that users are able to update their Organization’s defaults.

**Review Data**

Once your mapping has been set up, you are ready to process the downloaded data. The data review screen allows you to do this.

*Please note that the Review Screen can be enlarged to view all data at once.*
The review screen gives you an overview of the incoming data, the matches made to the records, the ability change those matches and the option to update the incoming data.

The data source tab gives you an overview of the data with the matches that have been made. The subsequent tabs correspond to the mapping areas that have previously been setup and displays the complete range of incoming data fields that you have mapped as well as any default values.

**Action To Take**

Each entry of incoming data has an action to take value.
The four options are as following:

- **Decide** – You need to decide how to proceed (by selecting one of the other options). This appears when there is a poor match in the match criteria.
- **Update** – Update an existing record in RE with these values. The existing record is selected from the Matched Raiser’s Edge contacts grid.
- **Create** – Creates a new record in the system
- **Ignore** – Ignores the incoming data. This will also write the data to the exception report so that you can import it at a later date.

**Match Quality**

<table>
<thead>
<tr>
<th>ID</th>
<th>Match Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Poor Match</td>
</tr>
<tr>
<td></td>
<td>Exact Match</td>
</tr>
<tr>
<td></td>
<td>Good Match</td>
</tr>
<tr>
<td></td>
<td>Exact Match</td>
</tr>
<tr>
<td></td>
<td>Poor Match</td>
</tr>
<tr>
<td></td>
<td>Exact Match</td>
</tr>
<tr>
<td></td>
<td>Exact Match</td>
</tr>
</tbody>
</table>
The match quality on the right-hand side of the grid shows how the match was made according to the criteria sets that you created in the mapping phase. If you did not create any criteria sets but relied upon the default lookup criteria then these values will show accordingly.

The match quality will be a “Poor Match” if the record matches a poor criteria set or if there are multiple matches made to one of the other quality matches.

Whenever a poor match has been made the action to take is set to “Decide”.

**Match In Grid**

![Match Grid Image]

Depending on the data source, it is possible that you will get two matching entries. From the example above, Lucy gave one day and then a day later decide to give again. Lucy is a new constituent in RE so she is set as create. Before setting the record to create, it does a check in the grid to ensure that the record has not already appeared. That is why the second entry for Lucy is update and not create. It has matched on the previous line and will not create a new entry. The Match In Grid column has the link icon showing that the entry is linked to a previous entry in the grid.

**Matched Constituents**

![Matched Constituents Image]
The matched Raiser’s Edge Contacts area shows the constituents that have been found in the system. In the case of Nicole there are two matches and we can decide which of them to use. If we need some more guidance we can open the record directly by pressing the RE button in the grid.

If we are not happy with any of the matches we can use the find constituent button to attempt to look them up in RE.

**Filtering and globally updating the grid**

Press the left-most button to bring up the filter pane.

You can filter the items in the grid using the Filter by Action dropdown:
This makes it easier to only see actions of a particular type.

You are also able to update all of the selected items to a new action.

**Viewing and Editing Values**

It is possible to drill down and view all of the incoming data and edit it.
If we look at the addresses tab we can see all of the information that has been mapped. In the example above we have selected the email mapping group and can see the name of the individual, the phone type, email address and other fields (not shown).

At this point we can edit the data that we see above. However we are only able to edit incoming values and not values that have been defaulted in the mapping. In the above example the phone type column has been disabled but the email column is editable.

We are able to update a value in the grid and it will be imported with all the other data.

**Saving your changes**

You may find you have many changes to make before validation, particularly if you are importing large volumes of data. If for any reason you need to exit the review screen you can save these changes by clicking on ‘review’ in the top left menu bar and selecting ‘save review screen’.

This will save all record matching and changes to ‘action to take’ dropdowns but not field value edits.

The next time you return to that template with the same set of records you will be prompted to load the session or look the records up again.
Validating and Importing

We are able to validate the data before importing. This will perform all the same validation checks without actually saving it to RE. That way if there are errors we can fix them before importing the data.

On pressing the Validate button we get the error shown below. This is because we have not updated the decide values in the grid.
Once we have changed those values we are able to proceed.

As the application is processing the record the status column updates to show you what has happened to the records.

The summary screen also gives you an overview. If you have entered a control report on the start screen then the View Control Report button will be enabled and you are able to open it and look at the results.
The first row is an “Ignore” row that was sent to the control report. The second row is telling us that county value of Somerset does not exist in RE. We can fix that issue in RE and validate again. Once we are happy with the results we can untick the Validate Data Only tick box and we are ready to import the data.
Advanced Settings

Managing Templates

Your import templates are specific to each data source and can be exported, backed up and imported here.

Export, Import and Delete

For individual templates

Backup and Restore

For all templates – we recommend you backup all your templates on a regular basis

Clone for file

You can duplicate a template created for a specific data source for use with a file format, for example your exceptions report from an import.
Security

Prior to version 3.0 of Importacular there were two levels of security. If a user was not allowed to import then they would not be allowed access to the application. If they had supervisor rights then they would be able to manage the more advanced settings.

In version 3.0 security was added to the application. The security module, assuming that you have rights to it, can be found under the File menu as shown below.

![Security Settings]

Security Settings

The security settings are automatically set up the first time a user starts working with Importacular but you are able to go in and update them.

A user that has supervisor rights will always have access to all areas of the application.

The rights that a user can have are split into 7 different areas. Note that a user should be given all the rights that they need. Even if a user has the rights to delete a template, if they

---

7 The first time a user starts the application with the new security settings (either after they have upgraded from a previous version or have simply started using Importacular for the first time) they are automatically given all rights to security. This means that if you have previously used Importacular then you will not be stopped from using it just because a user from another security group has not given you the rights. You should check to see that this is appropriate.
do not have the rights to use the application then they will never even get to the template mapping area. The exception to this is if a user can add or edit a template then they should not be given the “Only View Templates” rights.

The different rights that can be assigned to one or more RE security groups is shown below in the dropdown:

Select a right and then select which security groups apply to it.

Below we can see an example:
In this example the right to add and edit templates is given to the Data Entry security group as well as the Admin security group. However the Volunteers and limited security groups are not able to add or edit templates.

**Points to Note**

- All users that should use Importacular should be given the right *General use of the application (without this nothing is possible)*. If a security group has been given a right but not this general usage right you will be prompted to add that group.
- In general the security groups do not overlap. The exceptions are the rights *Only view templates (in read only mode)* and *Add and Edit templates (including deleting mappings)*. The rights to an area are positive. If the security group has the rights to add and edit templates then they will be able to do so irrespective of whether they have the view only right too.
Acceptable Date Formats

Importacular will attempt to import dates into Raiser’s Edge in the format that Raiser’s Edge expects. If dates are imported that do not have the expected format it may be necessary to transform them.

When transforming date formats from the incoming value into a format that Raiser’s Edge understands it is possible to create a custom format. (See Date Transformations and Dynamic Dates for an overview).

You create a custom format using the following combinations of letters. This is based on the .NET formatting. Please note that these formats are case sensitive.

<table>
<thead>
<tr>
<th>Letter</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>d</td>
<td>Represents the day of the month as a number from 1 through 31. A single-digit day is formatted without a leading zero</td>
</tr>
<tr>
<td>dd</td>
<td>Represents the day of the month as a number from 01 through 31. A single-digit day is formatted with a leading zero</td>
</tr>
<tr>
<td>ddd</td>
<td>Represents the abbreviated name of the day of the week (Mon, Tues, Wed etc.)</td>
</tr>
<tr>
<td>dddd</td>
<td>Represents the full name of the day of the week (Monday, Tuesday etc.)</td>
</tr>
<tr>
<td>h</td>
<td>12-hour clock hour (e.g. 7)</td>
</tr>
<tr>
<td>hh</td>
<td>12-hour clock, with a leading 0 (e.g. 07)</td>
</tr>
<tr>
<td>H</td>
<td>24-hour clock hour (e.g. 19)</td>
</tr>
<tr>
<td>HH</td>
<td>24-hour clock hour, with a leading 0 (e.g. 19)</td>
</tr>
<tr>
<td>m</td>
<td>Minutes</td>
</tr>
<tr>
<td>mm</td>
<td>Minutes with a leading zero</td>
</tr>
<tr>
<td>M</td>
<td>Month number</td>
</tr>
<tr>
<td>MM</td>
<td>Month number with leading zero</td>
</tr>
<tr>
<td>MMM</td>
<td>Abbreviated Month Name (e.g. Dec)</td>
</tr>
<tr>
<td>MMMM</td>
<td>Full month name (e.g. December)</td>
</tr>
<tr>
<td>s</td>
<td>Seconds</td>
</tr>
<tr>
<td>----</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>ss</td>
<td>Seconds with leading zero</td>
</tr>
<tr>
<td>t</td>
<td>Abbreviated AM / PM (e.g. A or P)</td>
</tr>
<tr>
<td>tt</td>
<td>AM / PM (e.g. AM or PM)</td>
</tr>
<tr>
<td>y</td>
<td>Year, no leading zero (e.g. 2001 would be 1)</td>
</tr>
<tr>
<td>yy</td>
<td>Year, leading zero (e.g. 2001 would be 01)</td>
</tr>
<tr>
<td>yyyy</td>
<td>Year, (e.g. 2001 would be 2001)</td>
</tr>
<tr>
<td>yyyy</td>
<td>Year, (e.g. 2001 would be 2001)</td>
</tr>
<tr>
<td>K</td>
<td>Represents the time zone information of a date and time value (e.g. +05:00)</td>
</tr>
<tr>
<td>z</td>
<td>Represents the signed offset of the local operating system's time zone from Coordinated Universal Time (UTC), measured in hours. (e.g. +6)</td>
</tr>
<tr>
<td>zz</td>
<td>As z but with leading zero (e.g. +06)</td>
</tr>
<tr>
<td>zzz</td>
<td>Represents the signed offset of the local operating system's time zone from UTC, measured in hours and minutes. (e.g. +06:00)</td>
</tr>
<tr>
<td>f</td>
<td>Represents the most significant digit of the seconds fraction; that is, it represents the tenths of a second in a date and time value.</td>
</tr>
<tr>
<td>ff</td>
<td>Represents the two most significant digits of the seconds fraction; that is, it represents the hundredths of a second in a date and time value.</td>
</tr>
<tr>
<td>fff</td>
<td>Represents the three most significant digits of the seconds fraction; that is, it represents the milliseconds in a date and time value.</td>
</tr>
<tr>
<td>ffff</td>
<td>Represents the four most significant digits of the seconds fraction; that is, it represents the ten thousandths of a second in a date and time value. While it is possible to display the ten thousandths of a second component of a time value, that value may not be meaningful. The precision of date and time values depends on the resolution of the system clock. On Windows NT 3.5 and later, and Windows Vista operating systems, the clock's resolution is approximately 10-15 milliseconds.</td>
</tr>
<tr>
<td>fffff</td>
<td>Represents the five most significant digits of the seconds fraction; that is, it represents the hundred thousandths of a second in a date and time value. While it is possible to display the hundred thousandths of a second component of a time value, that value may not be meaningful. The precision of date and time values depends on the resolution of the system clock. On Windows NT 3.5 and later, and Windows Vista operating systems, the clock's resolution is approximately 10-15 milliseconds.</td>
</tr>
</tbody>
</table>
values depends on the resolution of the system clock. On Windows NT 3.5 and later, and Windows Vista operating systems, the clock’s resolution is approximately 10-15 milliseconds.

<table>
<thead>
<tr>
<th>Represents the six most significant digits of the seconds fraction; that is, it represents the millionths of a second in a date and time value. While it is possible to display the millionths of a second component of a time value, that value may not be meaningful. The precision of date and time values depends on the resolution of the system clock. On Windows NT 3.5 and later, and Windows Vista operating systems, the clock’s resolution is approximately 10-15 milliseconds.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents the seven most significant digits of the seconds fraction; that is, it represents the ten millionths of a second in a date and time value. While it is possible to display the ten millionths of a second component of a time value, that value may not be meaningful. The precision of date and time values depends on the resolution of the system clock. On Windows NT 3.5 and later, and Windows Vista operating systems, the clock’s resolution is approximately 10-15 milliseconds.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents the most significant digit of the seconds fraction; that is, it represents the tenths of a second in a date and time value. Nothing is displayed if the digit is zero.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents the time separator defined in the current DateTimeFormatInfo..::.TimeSeparator property. This separator is used to differentiate hours, minutes, and seconds.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents the date separator defined in the current DateTimeFormatInfo..::.DateSeparator property. This separator is used to differentiate years, months, and days.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents a quoted string (quotation mark). Displays the literal value of any string between two quotation marks (&quot;&quot;'). Your application should precede each quotation mark with an escape character ().</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Represents a quoted string (apostrophe). Displays the literal value of any string between two apostrophe ('') characters.</th>
</tr>
</thead>
</table>

Resources

For more information about working with any of our connected data sources, see their website:
• Eventbrite UK
• Eventbrite US
• Adestra
• Almabase
• Bidpal
• Classy
• Constant Contact
• Crowdrise
• Dotmailer
• Formstack
• Graduway
• iSAMS
• JustGiving
• Kimbia
• MobileCause
• WeDidIt
• VineUp