

Importacular Mapping Guide for Almabase

Default Template

This template maps some of the very basic fields for you and creates settings to allow for a simple import of data or just as a template to get you started, you can see details of this below. However there are a large number of additional fields you may wish to import, these will depend on your own RE set-up and processes so you can find advice and notes on these in the 'further data' section of our user guide.

For a full user guide and instructional videos please visit our [Importacular homepage](#)

Default Template Fields and Settings

Constituent

This is the first thing you need to create on any new templates, all mappings are attached to a constituent. Here we have mapped only the very basic fields:

- First Name
- Last Name
- Gender
- Giving score override set to a default of 'VIP', you can change this in the drop down of default options if you prefer

Constituent Home Address

- Address line 1
- Address line 2
- Address line 3
- Address line 4
- City
- State
- Zip
- Country
- Type is set to a default of 'Home'

Note, if you have lookup tables for State and/or Country you may need to set up some data transformations in the settings area of each of these fields to make sure

the data is added to RE. For example if the states in Alabase are two letters (e.g. NY for New York) but you use the full state name you will need to set up a transformation to ensure that RE can accept this data. See pages 25-32 of the [user guide](#) for details.

The settings for the address mapping are such that for existing RE records a new address will only be created if the Address and the Zip from Alabase do not match the Address Line 1 and Zip on the existing RE record. If they do not match it will create a new address with the type of 'home' and back up the existing address with the type of 'home' too. The new address will now be marked as primary. Addresses which do not have an Address Line 1 and a Zip will not be processed.

You can amend these settings in the address mappings area.

Phone

- Phone from Alabase is mapped to 'phone number' in RE
- Phone type is set as 'home' in RE by default. If you have more than one mobile phone type in RE you may wish to change this mapping.
- The phone number is set up to add as the primary phone by default, you can change this by unticking the check box

The settings for the phone mapping are such that for existing RE records a new mobile phone will only be created if the phone type and phone number from Alabase does not match the phone type and phone number on the existing RE record. If they do not match it will create a new phone row with the type of 'home phone' in addition to the existing one. The new phone will now be marked as primary.

You can amend these settings in the phone mappings area.

Email

- Email address from Alabase is mapped to 'phone number' in RE
- Phone type is set as 'email' in RE by default. If you have more than one email type in RE you may wish to change this mapping.
- The email is set up to add as the primary email by default, you can change this by unticking the check box

The settings for the email mapping are such that for existing RE records a new email will only be created if the phone type and email number from Alabase does not match the phone type and email number on the existing RE record. If they do not match it will create a new row with the type of 'email' in addition to the existing one. The new email will now be marked as primary.

You can amend these settings in the phone mappings area.



Further Data

Obviously there are a large number of additional fields you may wish to bring in from Almbase. These can be mapped within the existing mappings (e.g. middle name, nickname and date of birth in the primary constituent mapping). Or you can create new mappings for the data (e.g. you may have an attribute for those who have offered to be a mentor, or maybe you want to create mappings for social media handles). You can customise this default template to suit your own needs entirely.

Organisational Relationships

You can create Organisational Relationships for incoming constituents using the employment fields in your Almbase data. This is not part of the free version of Importacular and costs \$450pa*. If you would like a two-week trial or more information please contact development@zeidman.info

Educational Relationships

You can create Educational Relationships for incoming constituents using the employment fields in your Almbase data. This is not part of the free version of Importacular and costs \$450pa*. If you would like a two-week trial or more information please contact development@zeidman.info

Preventing Duplicates

Existing records are looked up based on sets of criteria, these are completely customisable but we have some to get you started.

There are four base sets for individual matching:

1. Match on Cons ID – Exact Match
2. Match on email – Exact Match
3. Match on First Name and Equivalents (James, Jim etc.), Surname and Zip – Good Match
4. Match on Surname and Postcode – Poor Match

Three for Organisation matching:

1. Match on Cons ID – Exact Match
2. Match on email – Exact Match
3. Match on org name and aliases – Good Match

For more information on how these work and creating your own criteria sets please see the section 'Avoiding Duplicates' on pages 60-65 of the [user guide](#) and our [instructional video here](#).



* All prices correct as of September 2017

