

# Importacular Mapping Guide for Graduway

## Default Template

This template maps some of the basic fields for you and creates settings to allow for a simple import of data, 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 walk through of getting Importacular set up with Graduway and importing data please see our screencast [available here](#).

For a full user guide and instructional screencasts 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
- Giving score override set to a default of 'VIP', you can change this in the drop down of default options if you prefer
- Gender – we have set this as a default of 'unknown' as this is not collected by Graduway. We have also set this to update for new records only so it won't overwrite existing gender data in your database. You can see these settings by clicking on the green settings switch next to the gender field.

<input type="checkbox"/>	Fiscal Year Starts				
<input type="checkbox"/>	Gender		Unknown		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Giving Score Override		VIP		<input type="checkbox"/>

This will open up the settings box for the associated field

**Field Settings (Gender)**

**Only Update Values For...**

New Records  Existing Records

**Text Casing**

No Casing  Proper Case  Upper Case  Lower Case

**Custom Changes**

Add custom text to dynamically change source data

From Source	Change To Target	Catch All

+ x ⏪ ⏩

Cancel Save

Select either a source field name or default value for the corresponding row in Raiser's Edge

From RE 7.96 patch it will option to leave this field blank or work with your own code table. You can adjust this setting if you are hosted or have upgraded to the latest patch.

## Constituent Home Address

- Address mapped to 'Address'
- 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 Graduway 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.



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The settings for the address mapping are such that for existing RE records a new address will only be created if the Address line one and the Zip from Graduway 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.

Any addresses without a zip code will not be processed.

You can amend these settings in the address mappings area.

## Email

- Email address from Graduway 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 address 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 email type and address from Graduway does not match the email type and address on the existing RE record. If they do not match it will create a new email row with the type of 'home' in addition to the existing one. The new email address will now be marked as primary. You can amend these settings in the email address mappings area.

## Phone

- Phone from Graduway 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 email 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 number from Graduway does not match the phone type and 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.

## Company Name

Organisational relationships are created under the 'Organisations' tab and are mapped as below

- Org Name = Company



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- Position = position
  - Is Employee = ticked
  - Is primary = ticked
  - Relationship = Employer
  - Reciprocal = Employee
  - Reciprocate = ticked

Settings are to convert non-constituent to constituent relationships

## School Name

Education relationships are created under the 'Education' tab and are mapped as below

- School Name = Name of institution
- Degree = degree
- Primary alumni = ticked

The settings for the education mapping are such that for existing RE records a new educational relationship will only be created if no existing matching relationships is found. The matching criteria is set to look at 'school name' and if 'primary alumni' is ticked. If it doesn't find a match from Graduway it will create a new educational relationship in addition to any existing ones. The new educational relationship will now be marked as primary. You can amend these settings in the Education mappings area.

## Further Data

Obviously there are a large number of additional fields you may wish to bring in from Graduway. These can be mapped within the existing mappings (e.g. you may wish to map 'graduation year' to the 'year graduated' field in the Education 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.

## 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 Equivalent (James, Jim etc.), Surname and Zip – Good Match



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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](#).

