

# Importacular Mapping Guide for OneCause

## Default Template

This template maps some of the basic fields for you and creates settings to allow for a basic 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.

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, all mappings are attached to a constituent. Here we have mapped only the very basic fields:

- First Name
- Last Name
- Constituent ID (we have set this as a 'no update' field, so it is simply used as a lookup field)
- Gender – we have set this as a default of 'unknown' as this is not collected by OneCause

### Constituent Home Address

- Street Address mapped to 'Address 1'
- City
- State
- Zip
- Country

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 OneCause 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 1 and the Zip from OneCause 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. You can amend these settings in the address mappings area.

## Email

- Email address from OneCause is mapped to 'phone number' in RE
- Email 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 settings for the email mapping are such that for existing RE records a new email will only be created if the email type and actual address from OneCause do not match the email type and actual 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.

## Mobile Phone

- Mobile phone from OneCause is mapped to 'phone number' in RE
- Phone type is set as 'mobile phone' in RE by default. If you have more than one mobile phone type in RE you may wish to change this mapping.

The settings for the mobile 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 OneCause do 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 'mobile phone' in addition to the existing one. The new phone will now be marked as primary. You can amend these settings in the mobile phone mappings area.

## Gift

- Acknowledged? - Default of 'Not acknowledged'
- Amount - 'Package Sold'
- Appeal - not mapped, if you want to map the Appeal to the OneCause Appeal field the values will need to match exactly your data in RE or you will need to create transformations as before.
- Campaign - not mapped, if you want to map the Campaign to the OneCause CampaignID field the values will need to match exactly your data in RE or you will need to create transformations as before.

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- Fund – mapped to Fund. The OneCause values will need to match exactly your data in RE or you will need to create transformations as before.
  - Date – mapped to ‘Transaction time’
  - Gift status – Default of ‘Active’
  - NL Post Date – Default of current date
  - NL Post Status – Default of ‘Not Posted’
  - Pay method – Default of ‘Cash’
  - Receipt – Default of ‘Not Receipted’
  - Receipt Amount – ‘Package Sold’
  - Type – Default of ‘Cash’

## Further Data

### Gift Type and Gift Subtype

If you want to map these to the gift type and subtype fields in RE then the OneCause values will need to match exactly your data in RE or you will need to create transformations as before.

### Company Name

You can create Organisational Relationships for incoming constituents using the Org Name field in OneCause. This is not part of the free version of Importacular, if you would like to find out about costs or more information please contact [development@zeidman.info](mailto:development@zeidman.info)

### Attendee Information

You can add participant information mappings with any of the attendee and ticket fields in your OneCause file. This is not part of the free version of Importacular, if you would like to find out about costs or more information please contact [development@zeidman.info](mailto:development@zeidman.info)

## Matching Existing Constituents

Existing constituents are looked up based on sets of criteria, these are completely customisable but we have four base sets:

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
4. Match on Surname and Postcode – Poor Match

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For more information on how these work and creating your own criteria sets please see the section 'Avoiding Duplicates' in the [user guide](#).

