

Excel Import

Importing New Contacts

- Create your spreadsheet of columns matching closely to the fields in DonorSnap.
 - For Example, DonorSnap has separate fields for FirstName and LastName, and separate fields for City, State and Zip. Your spreadsheet needs to be formatted the same way.
- You will MAP fields during the import, so field names do not have to be exact.
 - For example, your spreadsheet has ZipCode. DonorSnap uses Zip/Postal Code
- User Defined fields (Attributes, Birthdate, etc.) must be added to the database first, meaning you must already have a Birthdate field, in order to import to that field.
- Lookups to the field (for example under Attributes you may have Board Member, Family, etc.) can be added on import.
 - Add options to the Attributes column (Prospect, Teacher) that do not exist in the database already.
 - Lookups must be consistent (and exactly the same as any existing in DonorSnap) or all typos will be imported as well. For example if you add “Brd Member”, this will become a new Lookup in the drop-down.
- If you are importing ONLY contacts, you do not need an ImportKey#. The ImportKey is only required if you will be importing Donations or other activity records to this group of contacts.

Maintenance > Excel Import

1. File the file. Upload. Choose the Sheet.
2. Choose “Contacts” from the list of options to Import.
3. Choose duplicate checks, if needed.
4. Move through the tabs along the top, as they open up.

Duplicate Checking

If you are importing a group of contacts but *some* may already exist in DonorSnap, you can run duplicate checking on Name/Address/Email. Those found as duplicates will be noted – and you can choose NOT to import. Those not imported will be exported out as an Excel Spreadsheet.

****If those already existing have changes to their information (new attributes, updated email, etc., you will need to either update those records manually in the system, or add a column for their **ContactIPK** to your spreadsheet, and perform a **Contact Update** using the Excel Import tool.**



Importing Activity (donations, interactions, notes, etc)

When adding donations (or interactions or any other activity), you have to attach the donation to the contact record. We cannot have donations or other activity out there in space; they must be attached to the Contact who performed the activity.

So the first question is: **Are the Contacts already existing in DonorSnap?**

This will determine what process of importing you are doing, and how to set up your spreadsheet.

Importing Donations to Existing Contacts (ALL contacts are already within DonorSnap)

If the contact is an existing contact, **Use the ContactIPK** (their internal primary key or record number created by DonorSnap). You must have this number to link the donation to their existing record in DonorSnap. ****Note that Email would also work in this scenario.**

1. Create Your Spreadsheet of Donations (and names, as reference).

Add a column in your spreadsheet for ContactIPK to link the spreadsheet with the existing DonorSnap records:

- Manually look up the contact in DonorSnap; manually type in to your spreadsheet
- Run a DataMinerPlatinum report of all names/ContactIPK. Compare this spreadsheet with your spreadsheet of donations.
- Or the best case scenario, your spreadsheet originated with the ContactIPK# -- for example, you already imported the IPK's in to a memo field in QuickBooks, or if you are adding Interactions from an event where your event sign-in sheet had the ContactIPK# already on it.

2. Update Donation columns to match what exists in DonorSnap.

Include all fields relevant to the Donations tab (DonationType, PaymentMethod, Appeal, Campaign, etc.). Fields do not have to match exactly (for example, your spreadsheet might have Check #, but DonorSnap uses the Reference #).

Add new Lookups to the drop-downs within your spreadsheet. For example, add an Appeal code for "2015 Spring Mailing" within your spreadsheet and it will be created on import.



Any User-Defined fields must already exist in DonorSnap before importing. For example, if you have a field for “Number of Tickets” in your spreadsheet, this field must already be added to DonorSnap before you attempt to import (Maintenance > Site-Setup > User Defined Setup). It will not create on import.

3. **Import the Spreadsheet** (Maintenance > Excel Import)

- Choose **Donations** as the type to Import.
- Find your file, choose the Sheet.
- You do not need to check for duplicates (only do that when importing Contacts).
- Move through the tabs along the top as they open up.

4. **Verify your data.**

Look up contacts/donations in the database to verify the import went correctly.

IF you imported an error, remember you can back out that import. Return to the Import tool. Click the tab to the right for “Loaded Data Listing” and Reverse the Import. **Note that if you performed multiple imports, you must reverse imports in order – most recent import first.



Importing Donations (or other activity) to New Contacts – or unsure if the contacts exist

When importing donations or other activity, you have to tie the activity to the contact, right? So.... What happens when you don't have a ContactIPK (or don't know if you have an IPK) to attach?

Contacts **MUST** be in the system first, so we can attach the donations to them.

1. Create the Spreadsheet

Because we will eventually tie the donations to these contacts, you will need to **Create an ImportKey**. This ImportKey # will be used to link the donation to the contact you've just imported.

*** The point of this process is to have **UNIQUE** information for Contacts. You could use other fields, Address, Phone Number, etc., to import, but these will not be unique. Numerous contacts could have the same address. So ideally you will create this unique ImportKey # as that link.

However, many organizations have an increased capture of **Email Addresses**. Email is a good alternative to using the ImportKey. If you are importing a group of donations coming from an online vendor, such as Paypal, likely an email address was captured, and could be used in this import process.

We recommend the Importkey per contact be a combination of today's date, and a number at the end. 123201501; 123201502; 123201503, etc. This will ensure that today's import key will be unique from an import performed tomorrow.

2. Import Contacts

Import Tool, find file, select sheet, select Contacts to import.

Check for duplicates using numerous methods.

During this import process, the Duplicates (contacts already existing in DonorSnap) will error, and will be kicked out in to a spreadsheet of "Not Imported".



DonorSnap
Donor Management Made Easy

Now... there's TWO imports left to do because now you have two different groups of donations: donations for those contacts who are already in the program (using the ContactIPK from the program to link the donations) and donations for those New contacts you using added (using the ImportKey from your last import, to link the donations).

Clean up your two spreadsheets; research the IPK#s for the existing contacts spreadsheet of donations.

3. **Import Donations from the NEW contacts**, from the spreadsheet with the ImportKey, using the ImportKey to match up
4. **Import Donations from the Existing Contacts**, using the ContactIPK to link