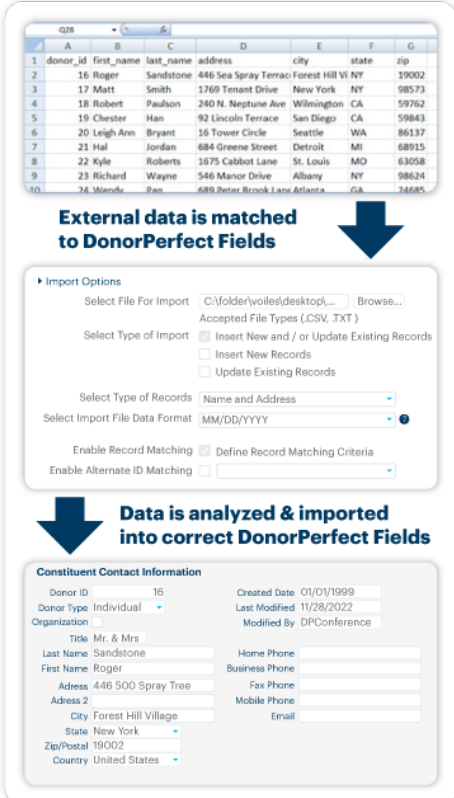# DonorPerfect Online Import Module

The Import Module makes it easy to import new records or update existing records.

With this module, you can import and update:

- Names & mailing addresses
- Phone numbers & email addresses
- Gifts & codes
- Pledges, including pledge payments
- Transactional data & date-driven data such as donations or hours volunteered

Features

- Advanced logic helps match data automatically between the import file & DonorPerfect
- Multiple ways to find & match records; reducing duplicate records
- Links pledges & gifts automatically
- Import multiple gifts for the same donor
- Preview data during import
- Automatic field analysis checks for misspelled fields or lengths as well as missing required data
- Fix-on-the-fly allows you correct data without leaving import
- Import summary shows number of records
- Safeguards ensure records are added correctly before import
- Ability to import using an "Alternative ID"
- Intuitive error messaging (e.g. when a field is required, when a field is incorrect, etc.)
- Ability to export only erred records for import later

Benefits

- Eliminates manual data entry time
- Makes it easy to enhance the quality of your data using external sources
- Facilitates integration of DonorPerfect with other applications

Commonly Asked Questions
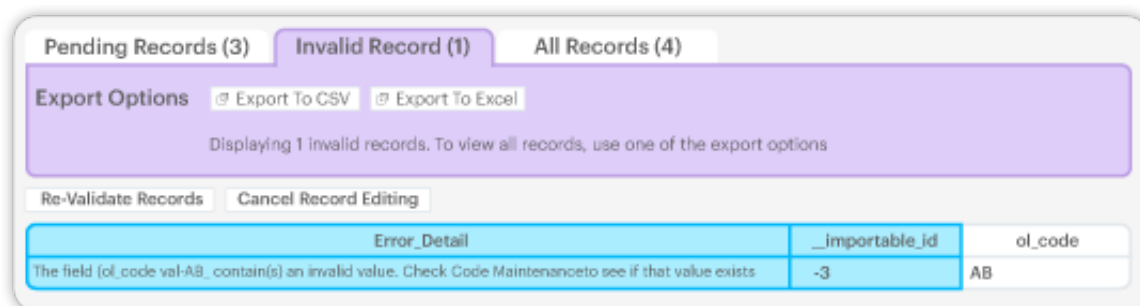
What types of file formats can I import?

Any comma, tab separated, .CSV and .TXT file can be imported. Also, other file formats such as Microsoft Excel or Access can be saved in ACSII format.

Can I use this module to import data into my customized (user-defined) fields?

Yes, the module can be used to import data into any field that exists in your DonorPerfect system in the main, address, phone, gift, and code maintenance databases.

Will this module help correct any problems with data in my import file?

Yes! Using advanced logic, the system analyzes the import file to make sure that all the information will be imported and processed correctly. It points out the errors while still in the import process, so you can make corrections on the fly without having to discontinue the import.

Pending Records (3)	Invalid Record (1)	All Records (4)

Export Options ⧉ Export To CSV   ⧉ Export To Excel

Displaying 1 invalid records. To view all records, use one of the export options

Re-Validate Records	Cancel Record Editing

Error_Detail	_importable_id	ol_code
The field (ol_code val-AB_ contain(s) an invalid value. Check Code Maintenanceto see if that value exists	-3	AB

How can this be used to update my existing DonorPerfect records?

As long as the file to be imported contains data that can be matched to the DonorPerfect database, existing records can be updated with this module.

Does the Import Module replace DonorPerfect Data Conversion services?

No. While the Import Module facilitates the import of a wide variety of data, it cannot check for inconsistencies within the data itself, or protect against every type of user error. Ensuring that data brought into DonorPerfect can be used effectively requires a thorough understanding of DonorPerfect table structures and features. Our professional data conversion staff assists and identifies problems in your data that the import program would not be able to detect.

For these reasons, the Import Module is generally most useful when there is an ongoing need to import data into DonorPerfect, whereas our data conversion services make the most sense for one-time data import.