

# **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

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1	donor_id	first_name	last_name	address	city	state	zip	
2	16	Roger	Sandstone	446 Sea Spray Terrac	Forest Hill Vi	NY	19002	
1	17	Matt	Smith	1769 Tenant Drive	New York	NY	98573	
6	18	Robert	Paulson	240 N. Neptune Ave	Wilmington	CA	59762	
5		Chester	Han	92 Lincoln Terrace	San Diego	CA	59843	
5	20	Leigh Ann	Bryant	16 Tower Circle	Seattle	WA	86137	
7	21	Hal	Jordan	684 Greene Street	Detroit	MI	68915	
8		Kyle	Roberts	1675 Cabbot Lane	St. Louis	MO	63058	
9		Richard	Wayne	546 Manor Drive	Albany	NY	98624	
0.	24	Wendy	Pan	6R9 Peter Brook Lane	Atlanta	GA	24685	
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	-			Insert New Rec		Connering	3 100010	
				<ul> <li>Update Existing</li> </ul>	Records			
	Se	elect Type o	of Records	Name and Address				
	Select Im	port File Da	ata Format	MM/DD/YYYY • 0				
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				Define Record I	Matching Ci	riteria		
	Enable /	Uternate ID	Matching				•	
			the local	analyzed 8	impo	rted		
•	Constituer		o cor	rect Dono		ct F		
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## **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.

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Re-Validate Records	Cancel Record	Editing									
		_importable_id	ol_code								
The field (ol_code val-A8	_contain(s) an invalid v	alue. Check Code M	aintenanceto 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.

