



# Importacular for The Raiser's Edge

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## Overview

Importacular allows Raiser's Edge users to seamlessly import data from a variety of sources by directly integrating with the online applications and systems you use everyday. Use spreadsheets and .csv files without having to reformat your data. Pull details directly from sites such as Eventbrite, JustGiving and many more.

## Installation<sup>1</sup>

When you download Importacular from Zeidman Development and unzip the compressed file, there are two applications to be installed and one utility to help you determine what to install:

- The "Do I Need The Server Install" application tells you whether or not you need to run the server installation.
- Zeidman Development Universal Server Installer – installed on the server and only run once in order to set up the server. This should be run by the administrator.
- The main Importacular installer.

Start by running the "Do I Need The Server Install" application. This should be run on a regular workstation as a regular user. It will tell you whether or not you need to run the server setup or not.

If you are instructed to do so, run the server setup. This should be run by the administrator.

Then run the main Importacular installer.

In general the installation is straightforward. In each case run the setup.exe file and follow the wizard.

Please ensure that The Raiser's Edge and any other programmes are closed before starting your installation.

**WHEN UPDATING AN EXISTING INSTALLATION YOU DO NOT NEED TO RUN THE SERVER INSTALL. UNLESS YOU ARE MOVING DATABASES.**

Please download instruction for the Zeidman Development Universal Server Installer from our website: <http://www.zeidman.info/downloads/ZDUniversalInstaller.pdf>

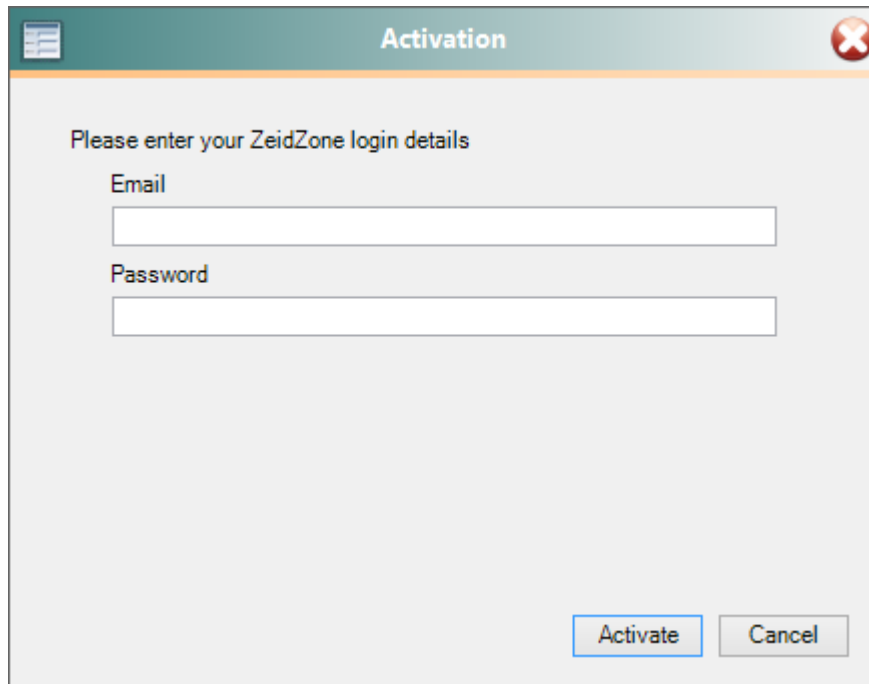
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<sup>1</sup> Please note that regretfully Importacular does not work in the Blackbaud hosted environment at the current time

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## Activation

You need to first click on Activate Importacular. This will prompt you to enter your ZeidZone username and password.



The image shows a software dialog box titled "Activation". The dialog has a light gray background and a title bar with a close button (red X) in the top right corner. The main text inside the dialog reads "Please enter your ZeidZone login details". Below this text are two input fields: one labeled "Email" and one labeled "Password". At the bottom right of the dialog, there are two buttons: "Activate" and "Cancel".

Activation will register your copy of Importacular with Zeidman Development. The process sends your organisation name and Raiser's Edge serial number to our secure servers. This generates a registration code that is unique to your installation.

## Settings

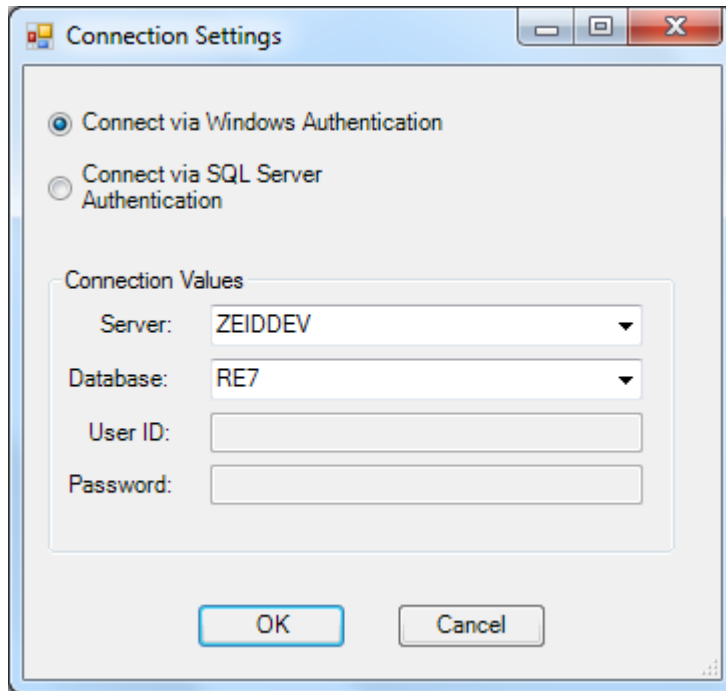
In order for Importacular to "talk" to external data sources it needs to know your API key or you may have to authenticate the data source so that it allows Importacular work with the web application.

Eventbrite, SurveyMonkey and Formstack for example all require you to enter your user name and password and agree to allow Importacular access to your data on those services.

JustGiving on the other hand requires a user name, password, charity id and application id but does not require specific approval.

The first time you use a data source you will be prompted for these details but as soon as you have authenticated once per database you ought not need to do so again.

The first time that you process an import you may be prompted for the connection details that you created in the server setup as shown below:



Enter the SQL server credentials that you set up on the server in order to continue.

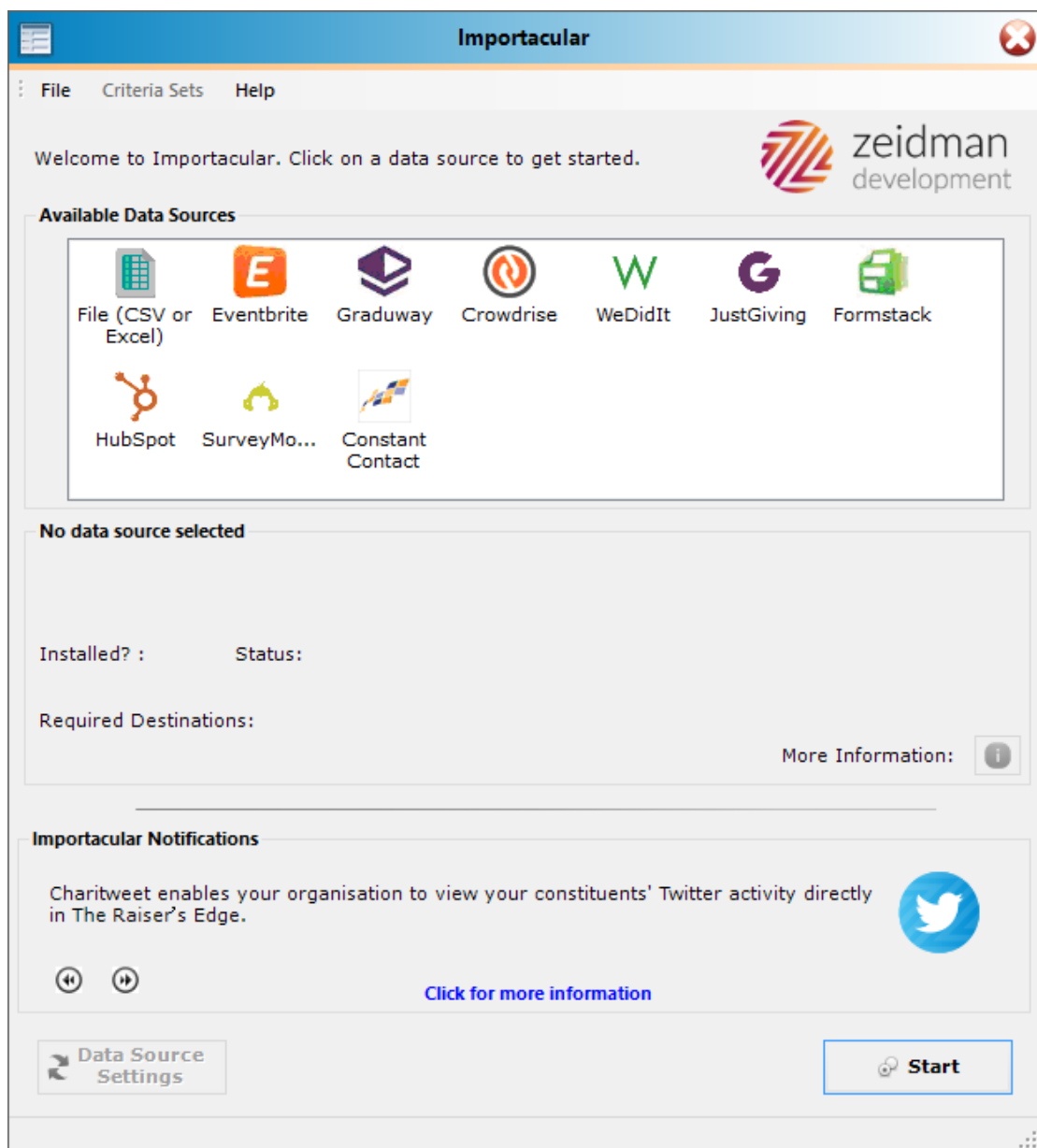
Note that you can also set these values by pressing the ZD logo on the main Importacular menu to bring up the About box. Under the advanced menu select "Setup SQL Credentials" to bring up the above screen.

You are now ready to start using Importacular.

## Day to Day Usage

The file data source and Constituent and Gift data destinations are available to Free users, all other sources and destinations can be purchased by contacting [development@zeidman.info](mailto:development@zeidman.info).

## Data Sources



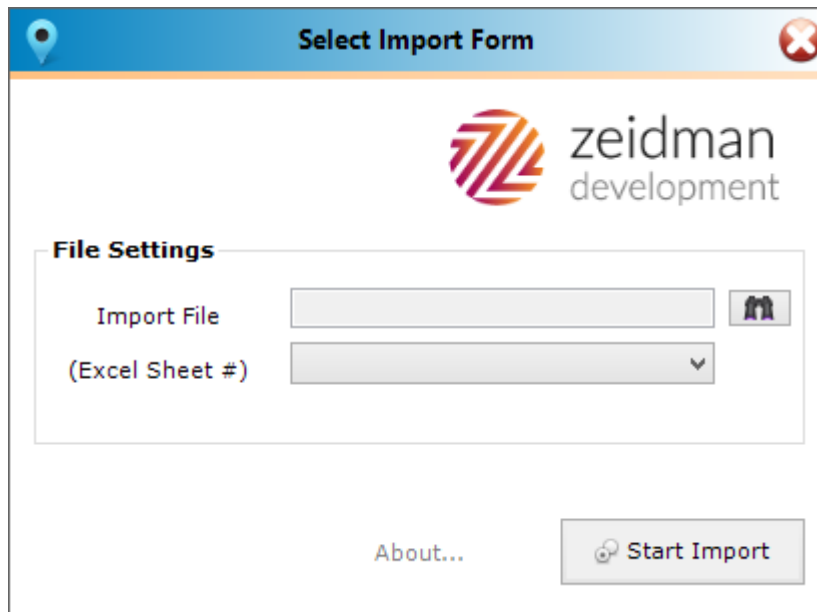
The main home screen gives you the current data sources that are available. Note that the available data sources may differ from the image above.

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Select a data source to continue.

## File (CSV or Excel)

To start working with a file based data source, press the start button and you will be prompted to select a file as shown below.

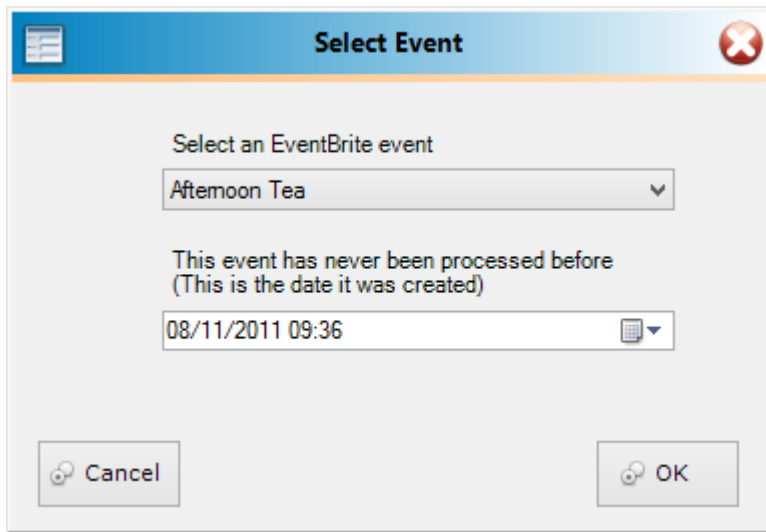


The screenshot shows a dialog box titled "Select Import Form" with a blue header bar. In the top left corner of the header is a location pin icon, and in the top right is a red close button. Below the header, the "zeidman development" logo is centered. A "File Settings" section is enclosed in a light gray border and contains two fields: "Import File" with a text input field and a binoculars icon to its right, and "(Excel Sheet #)" with a dropdown menu. At the bottom of the dialog, there is an "About..." link and a "Start Import" button with a play icon.

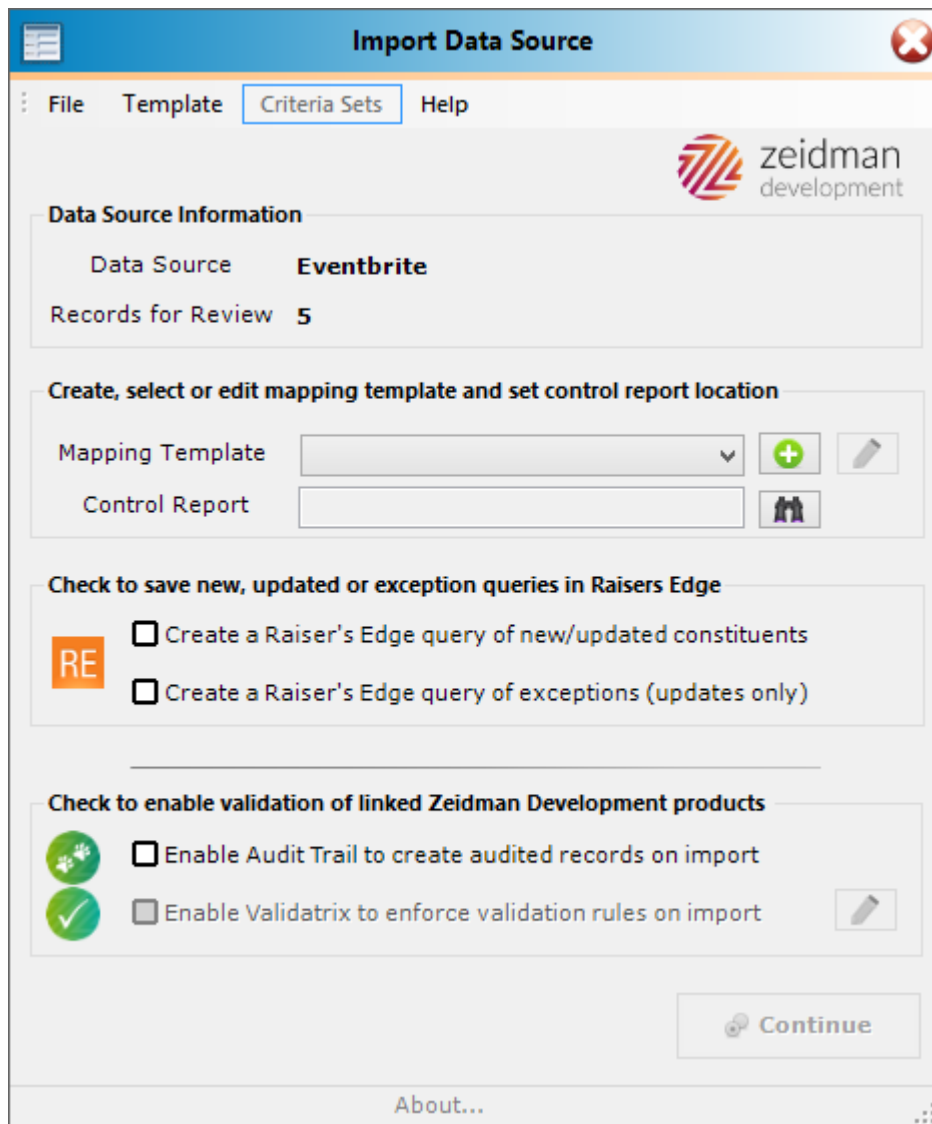
Press the binoculars to select a CSV or Excel file. For Excel you can also select the worksheet to import from

## Eventbrite

To import from Eventbrite you must first click on *Start* button in the bottom right of the above screen. Select the event you want to import data for and the date range for import. If you have not previously imported data for an event it will import all data for that event; if you have previously run this import it will automatically select the date when the import was last run (and import all data from that date to present).



Click 'OK" and you will be taken back to the home screen. Now click' start' and the below screen will appear.



With each data source you will need to create your mapping template based on the data you wish to import. You get access to import into the constituent and gift fields for free.

Click on the plus symbol, and choose a name for your mapping template. You can have many different templates. For example, you could have mapping templates setup for each type of event you organize, create mapping templates for each specific event ,or simply use a single one if the data you collect is always the same for all your events.

You can now map data to different areas of RE using the tabs provided. See [Mapping guide](#) for full details.

You also need to create a control report, this will show any errors in the import.

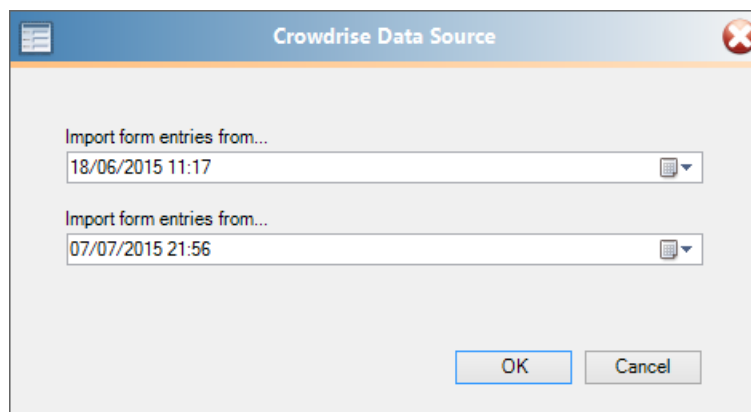
Choose to create queries of new and updated constituents and exceptions for review later.

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Finally if you have already purchased Audit Trail or Validatrix from Zeidman Development you can ensure all changes are tracked on import and subjected to existing data rules before committing changes. Find out more about Audit Trail and Validatrix [here](#).

## Crowdrise

Our Crowdrise import allows you to select a date range of donations to import into the constituent and gift areas by default or purchase further data destinations for more choice.



## Graduway

Our Graduway import comes with a template and allows import into the education, and organisation modules along with the standard Constituent and Gift options.

## FormStack

Our FormStack import allows you to select a particular form to import data from. Import into the default areas or purchase further data destinations for more choice.

## JustGiving

Our JustGiving import allows you to connect to JustGiving using your Charity Id and password. You are able to select up to a three month date range, then select which payments to import data from. Import into the default areas or purchase further data destinations for more choice.

## SurveyMonkey

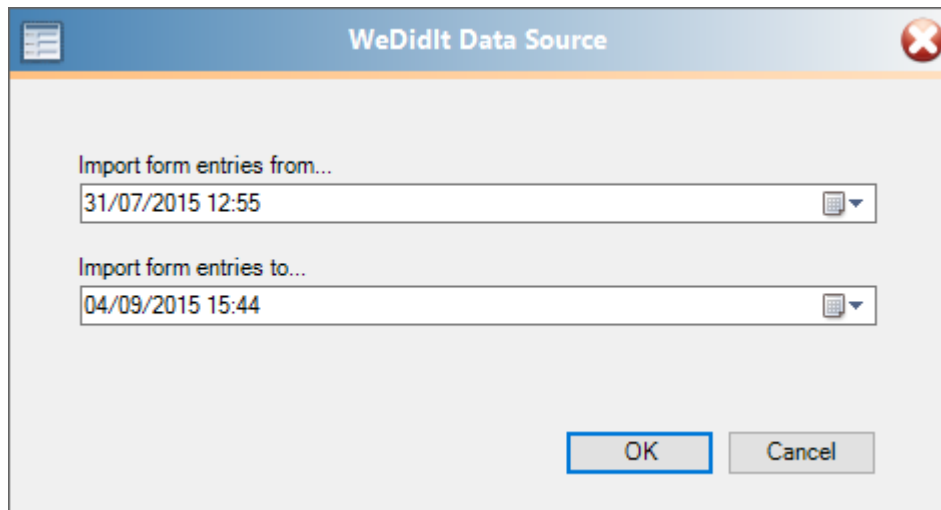
Our SurveyMonkey import allows you to select a particular survey to import data from. Import into the default areas or purchase further data destinations for more choice.

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## WeDidIt

Our WeDidIt import allows you to enter donor, donation and fundraiser information into The Raiser's Edge. Obtain your API key from your account manager in order to start.

Supply a from and to date to capture entries made during that timeframe.



The image shows a dialog box titled "WeDidIt Data Source". It contains two date selection fields. The first field is labeled "Import form entries from..." and has the date "31/07/2015 12:55" entered. The second field is labeled "Import form entries to..." and has the date "04/09/2015 15:44" entered. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

## General Data Source Setup

It is possible to update the data source settings by clicking on the data source settings button menu as shown below:



By selecting the authentication settings you are able to re-authenticate or update your authentication information.

By selecting Data Source Criteria you are able to update the specific criteria for the data source. This may be a date range, an event, a survey or a file name depending on the data source.

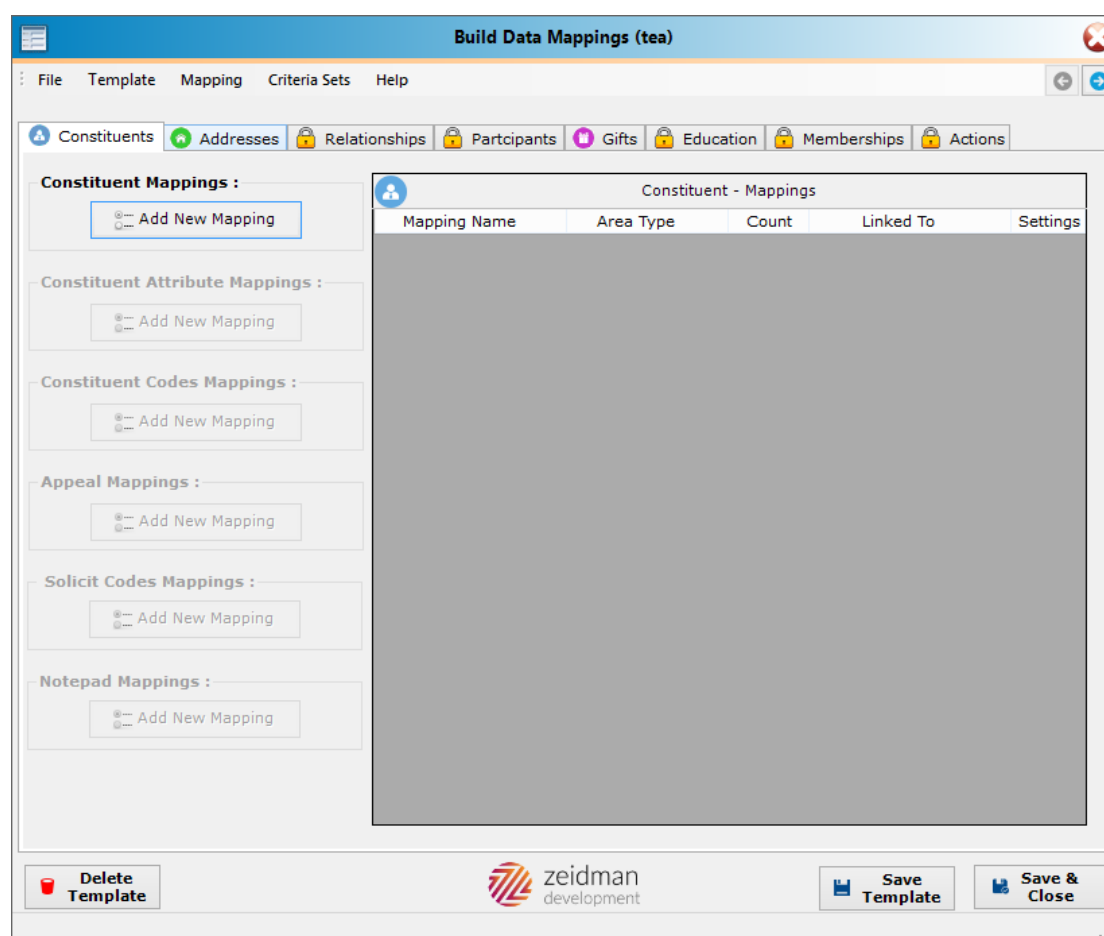
## Data Destinations - Mapping Guide

The areas you can import into in RE will vary depending on what you have access to, see your product sections for more details.

Mapping each area of The Raiser's Edge is relatively similar. Below we show you how to map constituents followed by a brief overview of the other areas where they differ.

### Import to Constituent

Either select an existing mapping or create a new one.



To create a new one select 'add new mapping' and choose between, individual, organisation or combined<sup>2</sup>. You will now be shown a grid where you can choose which RE fields should map to your source fields. Any field names that are identical will match automatically but you can edit these in the table if you wish.

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<sup>2</sup> You are able to import a mixture of individual and organization constituents in the same way as you would in a regular Raiser's Edge import. In this case you need a field that determines the key indicator (a value of "I" or "O") in the data source.

**Configure Constituent Data Mappings (Individual)**

Enter a name for the mapping and select an existing mapping that this will be linked to.

Create Mapping Name  Import/Linked with

Required	Rasiers Edge Field	Source Field Name	Default Value	Settings
<input checked="" type="checkbox"/>	Auto display annotation?		<input type="checkbox"/>	
<input type="checkbox"/>	Birthplace			
<input type="checkbox"/>	Birth date			
<input type="checkbox"/>	ID			
<input type="checkbox"/>	Deceased Date			
<input type="checkbox"/>	Ethnicity			
<input type="checkbox"/>	First Name	First Name		
<input type="checkbox"/>	Financial year starts			
<input type="checkbox"/>	Constituent is an honour/memorial?		<input type="checkbox"/>	
<input type="checkbox"/>	Income			
<input type="checkbox"/>	Industry			
<input checked="" type="checkbox"/>	Surname			
<input type="checkbox"/>	Maiden name			
<input type="checkbox"/>	Marital status			
<input type="checkbox"/>	Max Match Annual			
<input type="checkbox"/>	Max Match Per Gift			
<input type="checkbox"/>	Max Match Total			
<input type="checkbox"/>	Middle Name			
<input type="checkbox"/>	Min Match Annual			
<input type="checkbox"/>	Min Match Per Gift			
<input type="checkbox"/>	Min Match Total			
<input type="checkbox"/>	Nickname			
<input type="checkbox"/>	Primary Address Id			

You can choose to set a default value for certain fields. For example if you don't ask for address from a data source you can choose to mark all records imported as 'no valid address'.

Fields that are marked as required should either be mapped or a default value should be given for them. In the example above Surname (Last name in the US) is a required field as it is in RE. You must either map a field from the source or enter a default value in the default value column. Your organisation may have made other fields require in which case they will also be shown as required

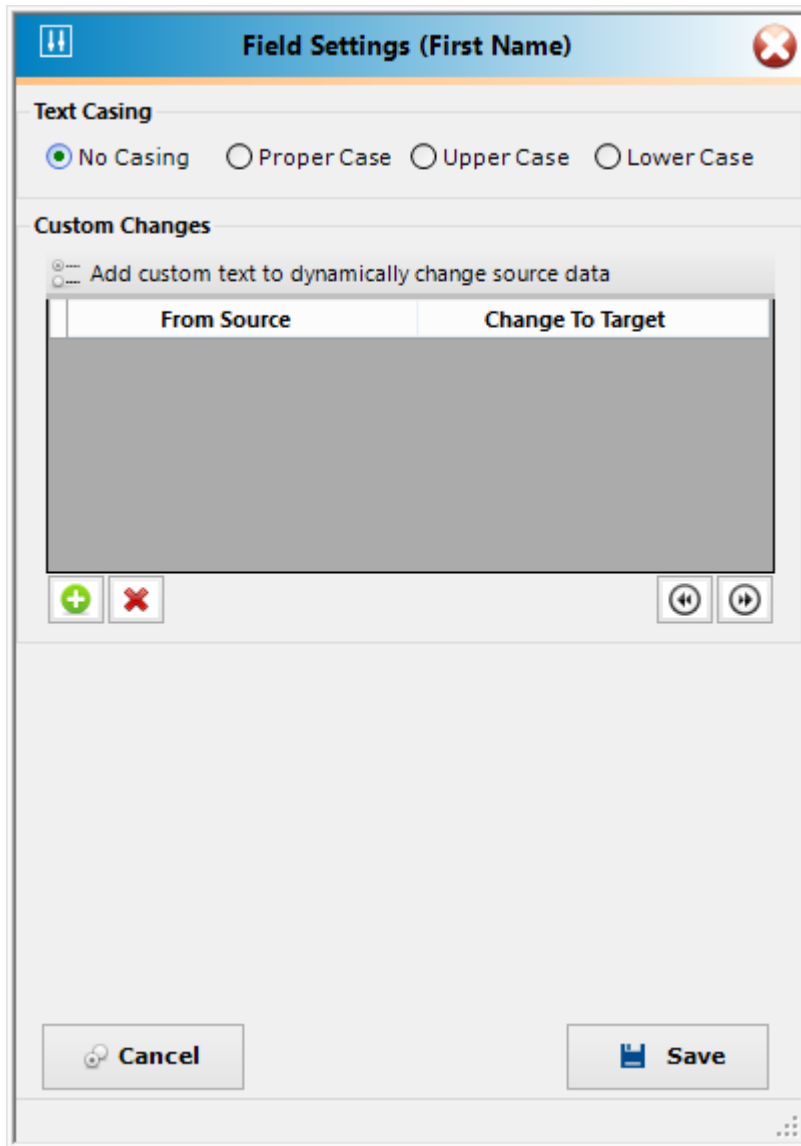
## Field Settings

You can also correct user entry errors before they reach your database using the settings for each field. The following options are available:

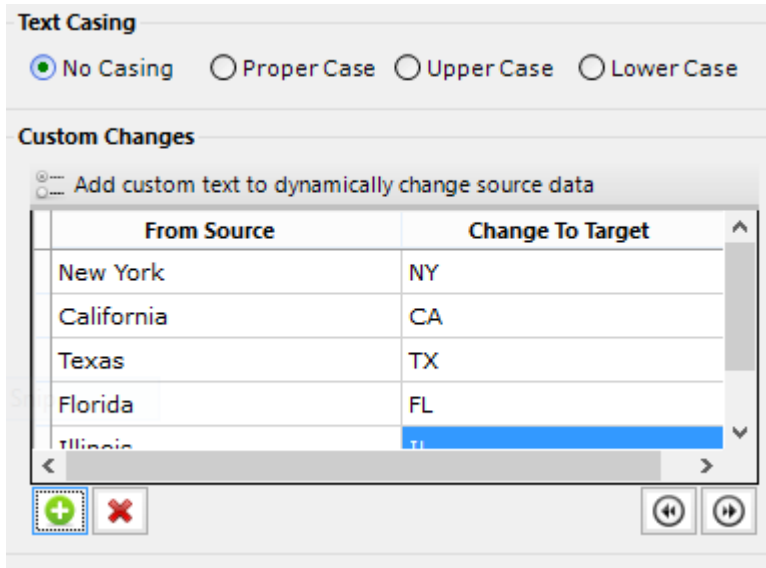
Make all incoming text in a field UPPER CASE

Make all incoming text in a field lower case

Make all incoming text in a field Proper Case



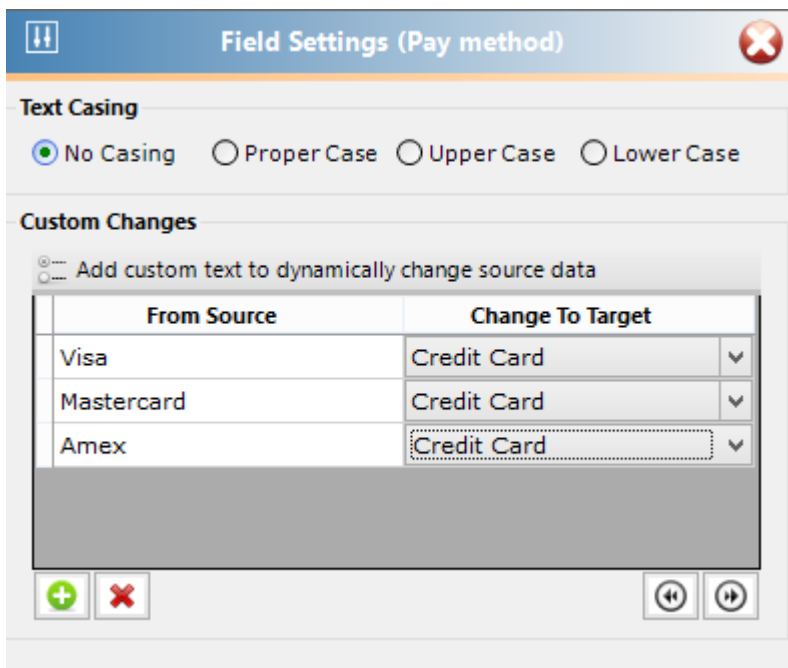
You can also dynamically change source data so for example if you use short codes for states/counties you might change all 'New York' to 'NY' as shown below.



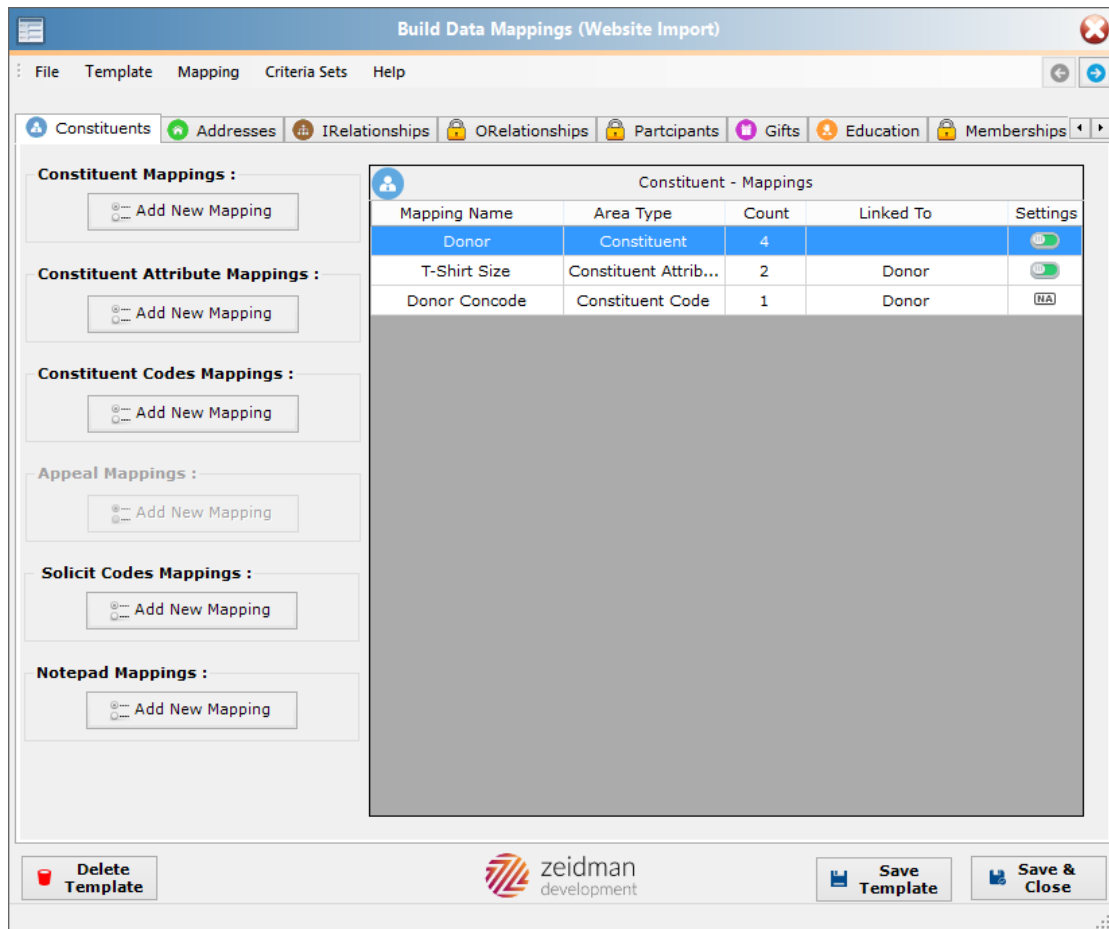
Or for pay method on a gift where the incoming value is the type of credit card, we may want to transform it to “Credit Card” like this:

<input type="checkbox"/>	Credit card number			<input type="checkbox"/>
<input type="checkbox"/>	Credit Type	Credit Card		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Date	Booking Time		<input type="checkbox"/>
<input type="checkbox"/>	Gift code			<input type="checkbox"/>
<input type="checkbox"/>	Letter code			<input type="checkbox"/>
<input checked="" type="checkbox"/>	Pay method	Credit Card	Cash	<input type="checkbox"/>

We have mapped the incoming “Credit Card” field to both Credit Type and also to Pay Method. However with Pay Method we transform the value.



Once you have mapped an area and saved it the area will be shown as below.



## Address Mapping

For each area you wish to import into, you will need to map each distinct field in The Raiser’s Edge. Address mapping follows a similar procedure to constituent mapping. As it is possible to have more than one constituent mapped per row you need to select which constituent to associate this address with. For example you may have the primary constituent, their business, their spouse, etc.

In the mapping screen, as well as giving the area a name, you also need to supply the “parent” of this area mapping. In the case of an address this will be a previously defined constituent mapping. Shown below you are able to select from Constituent, Spouse or Business which have been previously defined.

Configure Constituent Address Data Mappings
✕

Enter a name for the mapping and select an existing mapping that this will be linked to.

Import/Linked with

Afternoon Tea

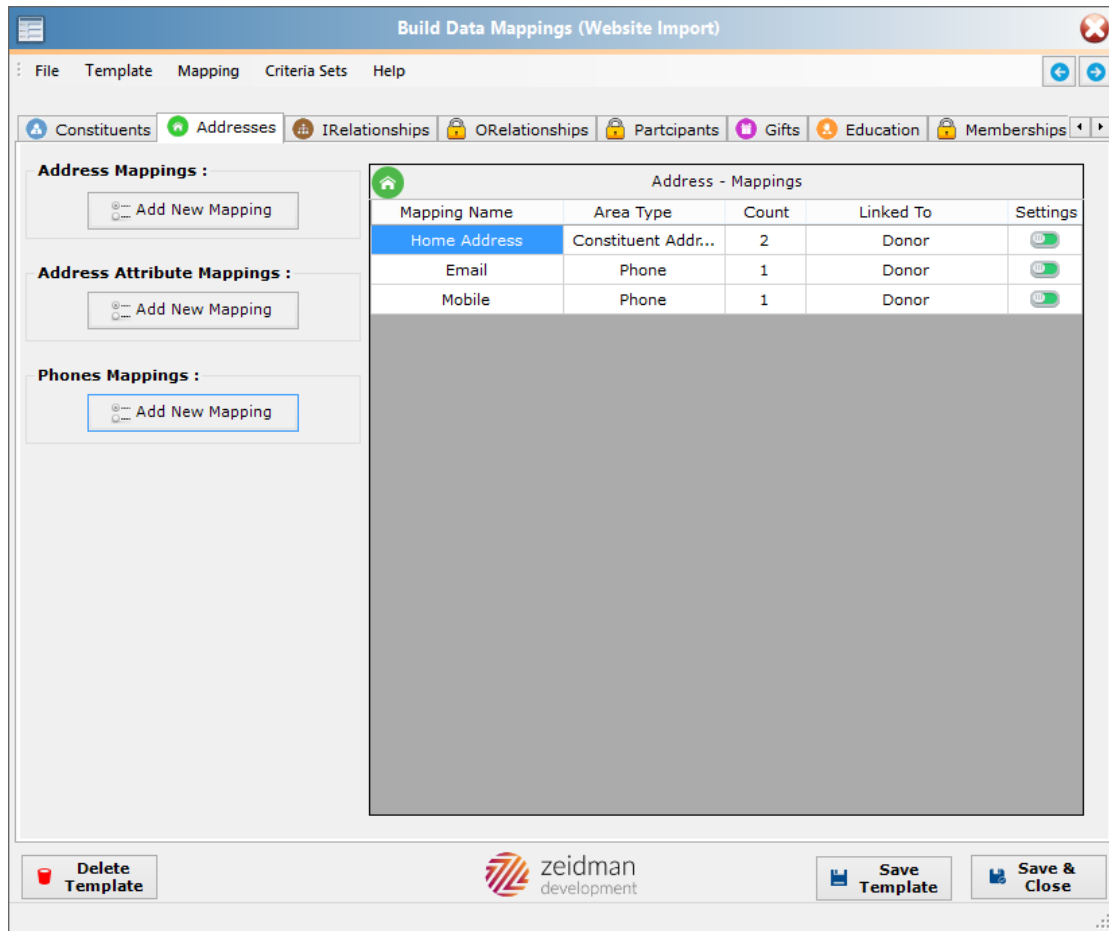
Required	Rasiers Edge Field	Source Field Name	Default Value	Settings
<input checked="" type="checkbox"/>	Date from	▼		⊞
<input type="checkbox"/>	Date to	▼		⊞
<input type="checkbox"/>	Info source	▼	▼	⊞
<input type="checkbox"/>	Send mail to this address	▼	<input type="checkbox"/>	⊞
<input type="checkbox"/>	Seasonal from	▼		⊞
<input type="checkbox"/>	Seasonal to	▼		⊞
<input checked="" type="checkbox"/>	Type	▼	▼	⊞
<input type="checkbox"/>	Preferred	▼	<input type="checkbox"/>	⊞
<input type="checkbox"/>	Seasonal address	▼	<input type="checkbox"/>	⊞
<input type="checkbox"/>	Address1	▼		⊞
<input type="checkbox"/>	Address2	▼		⊞
<input type="checkbox"/>	Address3	▼		⊞
<input type="checkbox"/>	Address4	▼		⊞
<input type="checkbox"/>	Address	▼		⊞
<input type="checkbox"/>	City	▼		⊞
<input type="checkbox"/>	Country	▼	▼	⊞
<input type="checkbox"/>	County	▼	▼	⊞
<input type="checkbox"/>	Postcode	▼		⊞
<input type="checkbox"/>	Region	▼	▼	⊞
<input type="checkbox"/>	State	▼		⊞
<input type="checkbox"/>	Linked	▼	<input type="checkbox"/>	⊞
<input type="checkbox"/>	Position	▼		⊞

Save Mapping

The same is true of other areas such as notepad, attributes and phones/emails.

## Area Settings

As well as field settings described earlier, there are also area settings that affect how you work with each of the area. For the most part these are settings that allow you determine the match criteria for the child record. For example, should you overwrite a matching address, always create a new address or always update the preferred address? Equally how should you handle attribute matching and phone matching.



You access the area settings from the settings column as shown above.

The first setting above allows you to determine whether or not this address will be used for looking up constituents. If you are positive that this address is new and will not be in RE then you can untick this and the lookup process may be quicker. Note that if you have address in the criteria sets and there is no other address set to lookup the record by then it will not be possible to untick this box.

The address settings shown above allow you to decide how you match on existing addresses, whether you simply overwrite the preferred address or whether you always add a new address (note with this last option, if you would like this new address to be preferred then ensure you map or set a default value for the preferred field in the address mapping)

There are a number of area settings that work in similar ways including attributes, phones and education.

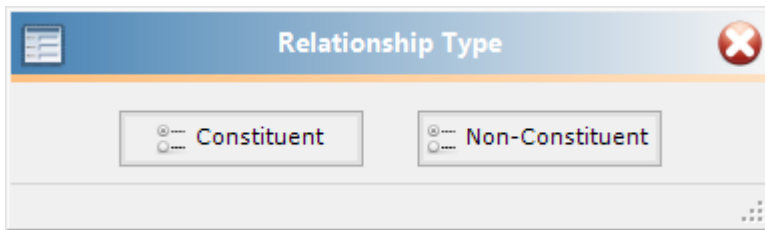
## Import to Gift

You will need to set up mappings for each different area you wish to import into and link it to a constituent mapping.

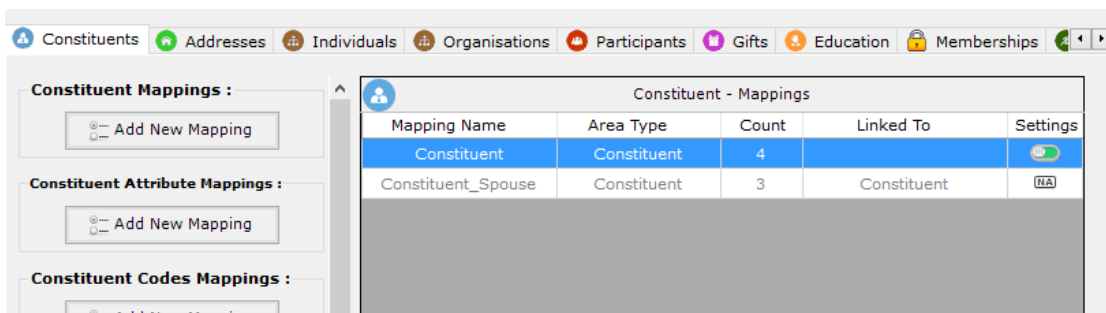
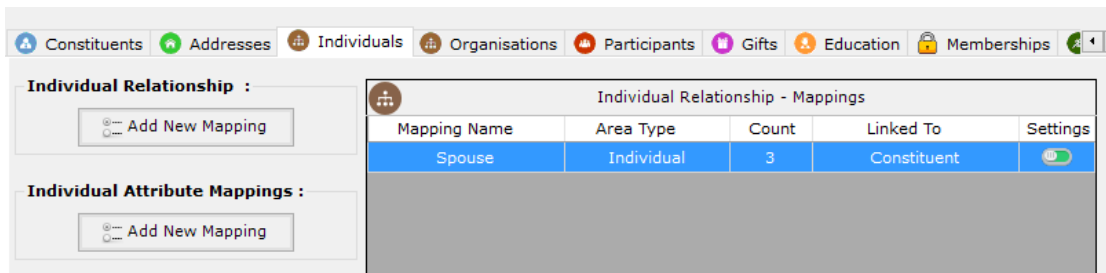
Currently gifts are imported directly on to a batch which will need to be committed following the import of data.

## Import to Individual Relationships

As with the other areas, you will need to set up mappings for each different area you wish to import into and link it to a constituent mapping. For relationships (both individual and organisation) you are able to specify which type of relationship should be created; either a constituent or non-constituent. On adding a new individual mapping you will be prompted for the type



When you select a constituent relationship, as well as Importacular adding an individual relationship area mapping to the individuals tab, it also adds a “virtual” mapping to the main constituent tab. This is shown below.



With the virtual mapping (shown above with the name “Constituent\_Spouse”) you are able to add other constituent mappings to it.

This can be used when you would like to add a gift to the spouse record as well as (or instead of) the main constituent record or, for that matter, would like to link any constituent data to the new constituent relationship record.

In any event mappings that appear on both constituent and relationships records can be added as you would with the constituent record e.g. if you want to add a phone to a relationship record you would simply select the relationship mapping to import with instead of the primary constituent. This is shown below:

Configure Phone Data Mappings

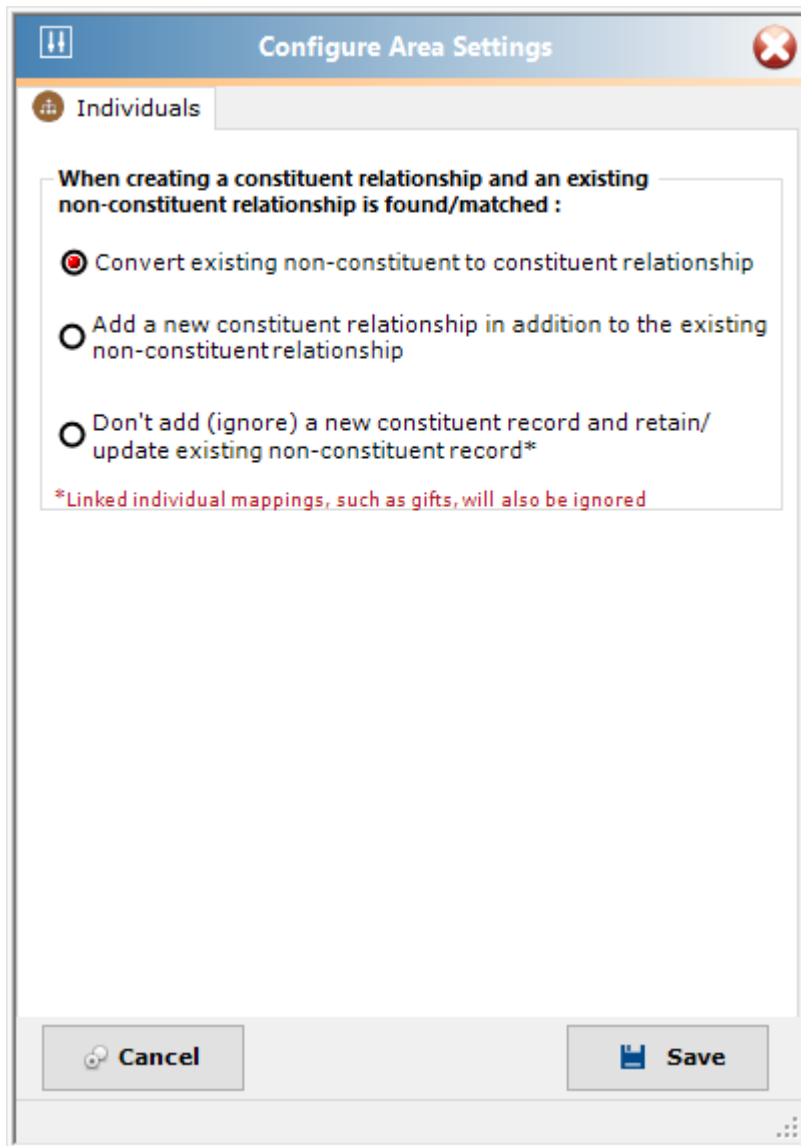
Enter a name for the mapping and select an existing mapping that this will be linked to.

Create Mapping Name:  Import/Linked with: Spouse Constituent Spouse

Required	Rasiers Edge Field	Source Field Name		
<input checked="" type="checkbox"/>	Phone type			Email <input type="checkbox"/> <span>⏻</span>
<input type="checkbox"/>	Phone number	Email		<input type="checkbox"/> <span>⏻</span>
<input type="checkbox"/>	Do Not Contact			<input type="checkbox"/> <span>⏻</span>
<input type="checkbox"/>	Is Primary?			<input type="checkbox"/> <span>⏻</span>
<input type="checkbox"/>	Inactive			<input type="checkbox"/> <span>⏻</span>

## Area Settings

As with other areas, you are also able to determine how an individual relationship record is processed if a match is found.



## Criteria Sets

As with constituents individual relationship records can also be looked up using criteria sets. These will vary depending on whether or not you have selected a constituent or non-constituent relationship record.

Currently gifts are imported directly on to a batch which will need to be committed following the import of data.

See the criteria sets section later in this document.

## Import to Organisation Relationships

Organisation relationship records work almost identically to individual relationships.

## Import to Participants

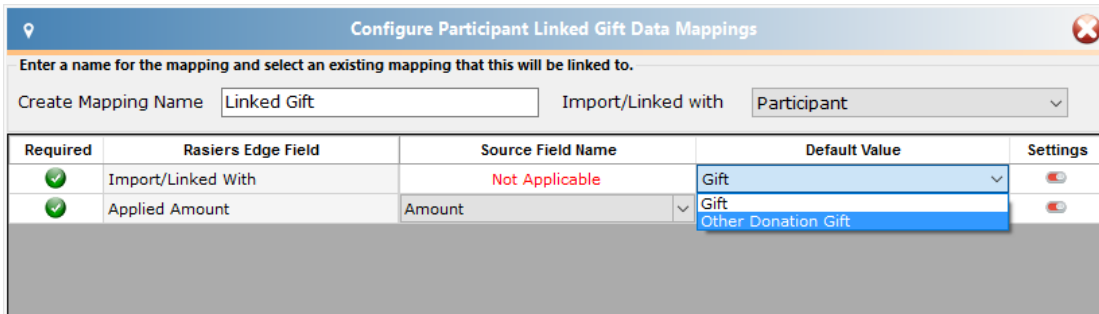
Importing to participants works in a similar way to the other areas. Importacular only allows you to create constituent participant records at the current time. You must therefore link to an existing constituent mapping.

Importacular assumes that there can only be unique constituents in an event (This is a Raiser's Edge configuration which by default prevents the same constituent being added multiple times to an event)

Mapping Name	Area Type	Count	Linked To	Settings
Participant	Participant	16	Constituent	(NA)
Linked Gift	Participant Linke...	2	Participant	(NA)
Dinner	Participant Dinne...	3	Participant	(NA)
Fees	Participant Regist...	4	Participant	(NA)
Linked Donation	Participant Donat...	2	Participant	(NA)

Note that when adding a participant link to a gift or adding participant donations the mapping screen is slightly different. Firstly you are only able to do this if you add a gift mapping.

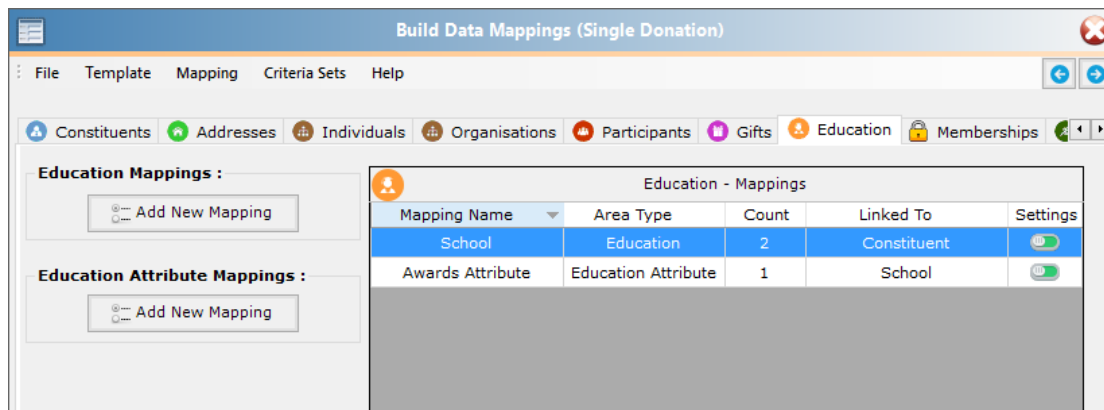
In the mapping screen you specify which gift to apply this link to as shown below:



Also note that this link will only appear once the gift batch in Raiser’s Edge has been committed.

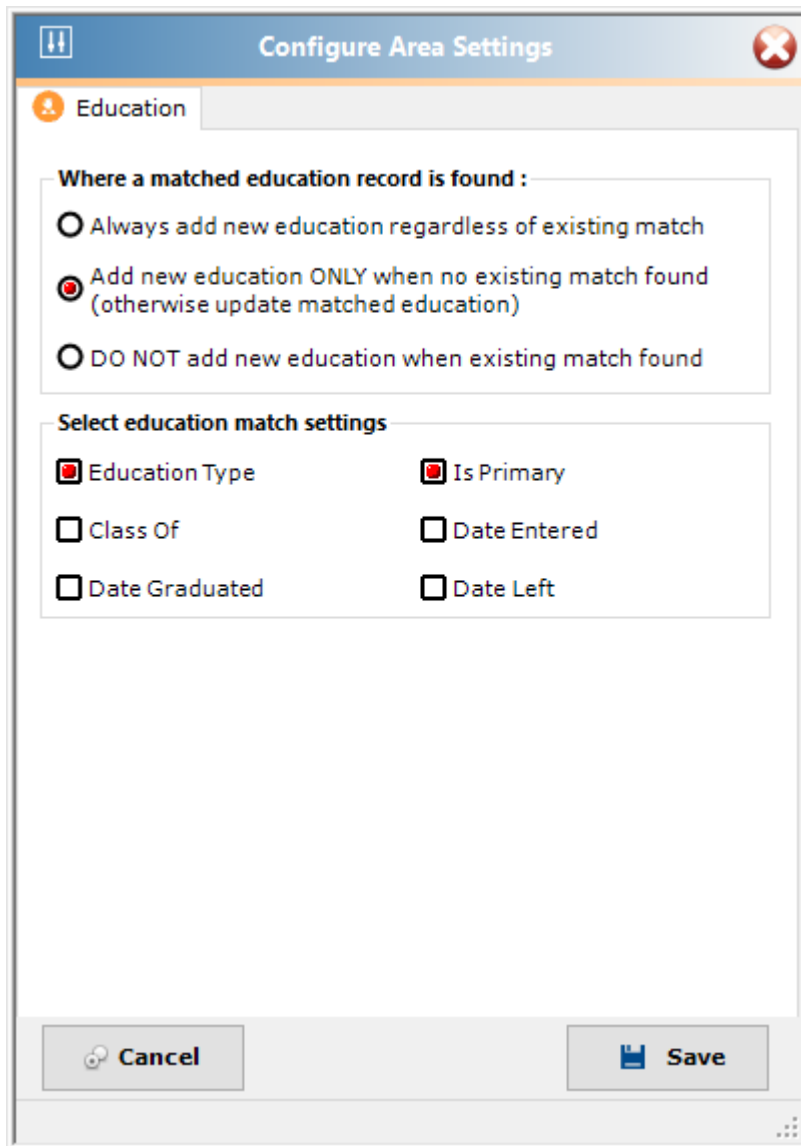
## Import to Education Relationships

Education relationships behave in a very similar way to the other relationship records.



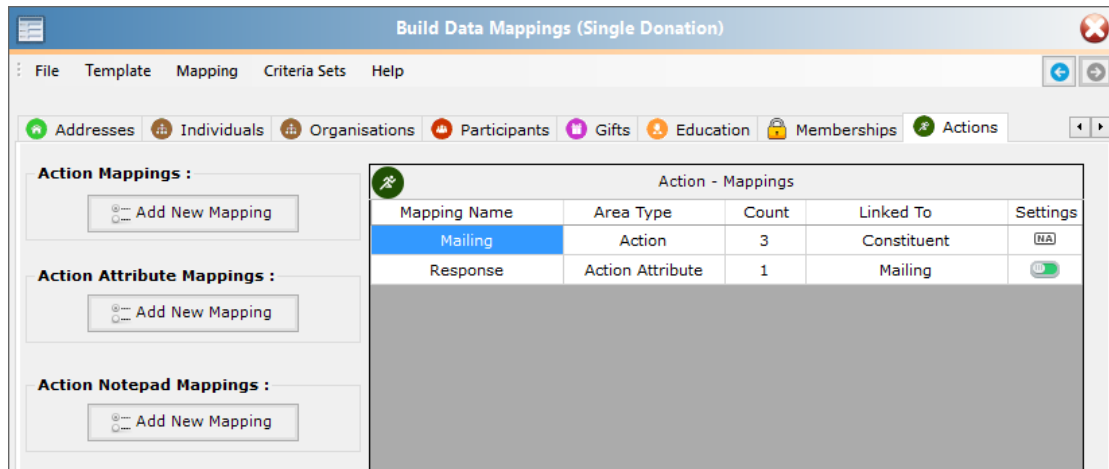
## Area Settings

Area settings are used to determine what happens when a match is made with an education record and how that match is made.



## Import to Actions

Actions behave in a very similar way to the relationship records.



## Coming soon

Soon you will be able to import on to the following areas too.

- Prospect Proposal
- Membership
- Tribute
- Volunteer/jobs

## Avoiding Duplicates

How do you want Importaclar to identify existing constituents?

Order	Description	Match Quality
1	Con Id, Compare blank values, Max matches:10	Exact
2	Email, Compare blank values, Max matches:10	Exact
3	First name, Surname, Address 1, Whole postcode, Compare b...	Good
4	Surname, Whole postcode, Compare blank values, Max matc...	Poor

How should the criteria sets be processed?

Use criteria set where fewest matches found

Use each criteria set to narrow down matches

Save Sets

In order to determine constituent matches you are able to set up lookup criteria sets. We supply default values but if you want to fine tune the look up process you can do so at this point. This is especially relevant if you do not expect there to be any physical address details supplied but only email address.

Access these settings from the criteria sets menu.

[Click here to skip this section.](#)

For each criteria set you create you can specify how good a match it is. This is useful when you review the data as you are able to tell whether or not a match was exact, good or poor. For example in line 2 above, we have specified that an email match is an exact match. However if you know that you have duplicate emails in RE you may want to make this a good match instead.

To create your own press the *plus* symbol. To edit an existing criteria set double click the row or press the *pen* symbol

**Lookup Criteria**

**Constituent Type**

All  
 Individuals  
 Organisations

**Biographical**

Match On	Number of characters
<input type="checkbox"/> Gender	
<input type="checkbox"/> Title	All
<input type="checkbox"/> First Name	All
<input type="checkbox"/> Check first name equivalents	
<input type="checkbox"/> First Initial	
<input type="checkbox"/> Surname	All
<input type="checkbox"/> Maiden Name	All
<input type="checkbox"/> Organisation	All
<input type="checkbox"/> Surname/Org Name Aliases	
<input type="checkbox"/> Spouse	
<input type="checkbox"/> Ignore spouse match where main match found	
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Import Id
<input type="checkbox"/> Constituent Id	<input type="checkbox"/> NIN
<input type="checkbox"/> Class Of	

**Address**

Match On	Number of characters
<input type="checkbox"/> Address Lines	All
<input type="checkbox"/> Check address equivalents	
<input type="checkbox"/> City	All
<input type="checkbox"/> County	All
<input type="checkbox"/> Postcode	
<input checked="" type="radio"/> All	
<input type="radio"/> First half only	
<input type="radio"/> All stripped of spaces	
<input type="checkbox"/> Email	
<input type="checkbox"/> Telephone	

**Other**

Use default collation  
 Use a different collation

Maximum matches: 10

Do not compare blank values in the file  
 All file fields must have a value for a match

Filter

OK Cancel

The screen above appears and gives you very many different options to choose from.

## Constituent Type

- It is possible to limit your search to either individual or organisation records only, or to include both, by selecting the appropriate radio button, shown below:

Look

Constituent Type

All

Individuals

Organisations

## Biographical

Look

Constituent Type

All

Individuals

Organisations

Biographical

Match On	Number of characters
<input type="checkbox"/> Gender	
<input type="checkbox"/> Title	All <input type="text" value="All"/> <input type="button" value="v"/>
<input type="checkbox"/> First Name	All <input type="text" value="All"/> <input type="button" value="v"/>
<input type="checkbox"/> Check first name equivalents	
<input type="checkbox"/> First Initial	
<input type="checkbox"/> Surname	All <input type="text" value="All"/> <input type="button" value="v"/>
<input type="checkbox"/> Maiden Name	All <input type="text" value="All"/> <input type="button" value="v"/>
<input type="checkbox"/> Organisation	All <input type="text" value="All"/> <input type="button" value="v"/>
<input type="checkbox"/> Surname/Org Name Aliases	
<input type="checkbox"/> Spouse	
<input type="checkbox"/> Ignore spouse match where main match found	
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Import Id
<input type="checkbox"/> Constituent Id	<input type="checkbox"/> NIN
<input type="checkbox"/> Class Of	

- Select the fields to match on. Note that the more fields that are matched on, the less likely it is to find a match. However in such a case if a match *is* found, it is more likely to be a positive match.
- Where appropriate it is possible to select the number of characters to match on.
- For surname/last name, organisation and maiden name it is possible to match on a soundex value. Soundex functions calculate a number for each combinations of letters so that the name “Zeidman” would have the same value as “Zidman”.

The image shows a search configuration panel. At the top, there is a checked checkbox labeled 'First Name' next to a dropdown menu currently displaying 'All'. Below this are two unchecked checkboxes: 'Check first name equivalents' and 'First Initial'.

- For first name it is also possible to search the first name equivalents<sup>3</sup>. For example a first name equivalent may have been set up for a constituent “Robert” so that if the names “Rob”, “Bob” or “Bobby” for example, are in the file the constituent “Robert” will be found.
- The **‘Surname/Org Name Aliases** tick box will check any aliases that may have been entered for an individual or organisation.
- The **‘Spouse’** tick boxes allow you to use spousal information as an identifier in the search. If you check this box then you are also offered the option to ignore spousal matches if the main record you are searching for is found. E.g. A household may consist of Jenny and Jim Smith (main constituent and spouse respectively). If you are searching on initial and address then both matches will be found. However if the Ignore spouse tick box is ticked Jim’s match will be ignored.
- The Date of Birth tick box will match fuzzy dates both in the file and on the record. For example there will be a match if on the file the date is “03/01/1967” and on the record there is a date “1967”. There will also be a match if the reverse is true and in the file the date is “1967” but on the record the date is “03/01/1967”. Note the date format used is the same as the Windows settings. The fuzzy date rules are the same as in The Raiser’s Edge.
- If you have unlocked the education data destination in Importacular then you are also able to lookup by Class Of to search for constituent in a specific year group.

## Address

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<sup>3</sup> You are able to add and edit first name equivalents from the home screen, click on the Zeidman Development logo to bring up the about box. Under the advanced menu select “First Name Equivalent Values” and then “Setup”. This will bring up a screen that will allow you to add new equivalent values and edit existing ones

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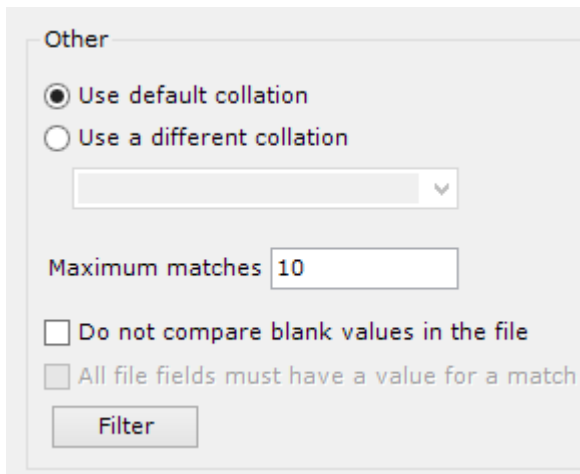
- If you have mapped the '**Address Line 1**' field, then the '**Use address equivalents**'<sup>4</sup> tick box is enabled. This allows you to match on address abbreviations that may exist within your database. For more information on viewing and customising the address equivalents see Advanced Options later in this document.
- The screenshot is from the UK and international edition. In the US and Canada edition county is replaced with state and with province respectively.
- It is possible to expand or limit your search to either half or the whole of your postcode, by checking the '**All** or '**First half only**' option buttons. You can also compare the postcode by removing any spaces (UK, Australian and Canadian versions only).
- The '**Email**' tick box will check all telephone types in Raiser's Edge that have been designated emails. This is found in Config when you edit the phone type code table entry.
- The '**Telephone**' tick box will compare any telephone type that has been designated a telephone, a fax or other. The phone number in the file will be stripped of any character other than a number. The comparison, however, will be against all fields stripped of the following characters: ( ) . - and any spaces.<sup>5</sup>

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<sup>4</sup> You are able to add and edit address line equivalents from the home screen, click on the Zeidman Development logo to bring up the about box. Under the advanced menu select "Address Equivalent Values" and then "Setup". This will bring up a screen that will allow you to add new equivalent values and edit existing ones

<sup>5</sup> The reason that there is a difference between what punctuation is removed is due to the techniques used. The field in the file can be stripped of all but numbers much more efficiently than can every field in the database.

## Other



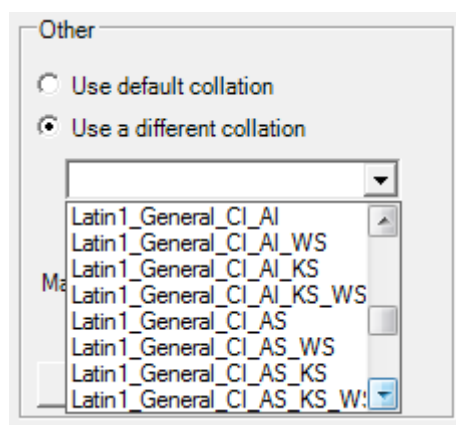
Other

Use default collation  
 Use a different collation

Maximum matches

Do not compare blank values in the file  
 All file fields must have a value for a match

- The collation is the way in which the database treats text. The entries consist of alphabet types and methods of comparison and sorting. In the majority of cases the default collation will suffice (it will search the same way as The Raiser's Edge searches). However by selecting one of the alternatives it is possible to make the search case sensitive or accent insensitive. For more information speak to your organisation's network or database administrator.



Other

Use default collation  
 Use a different collation

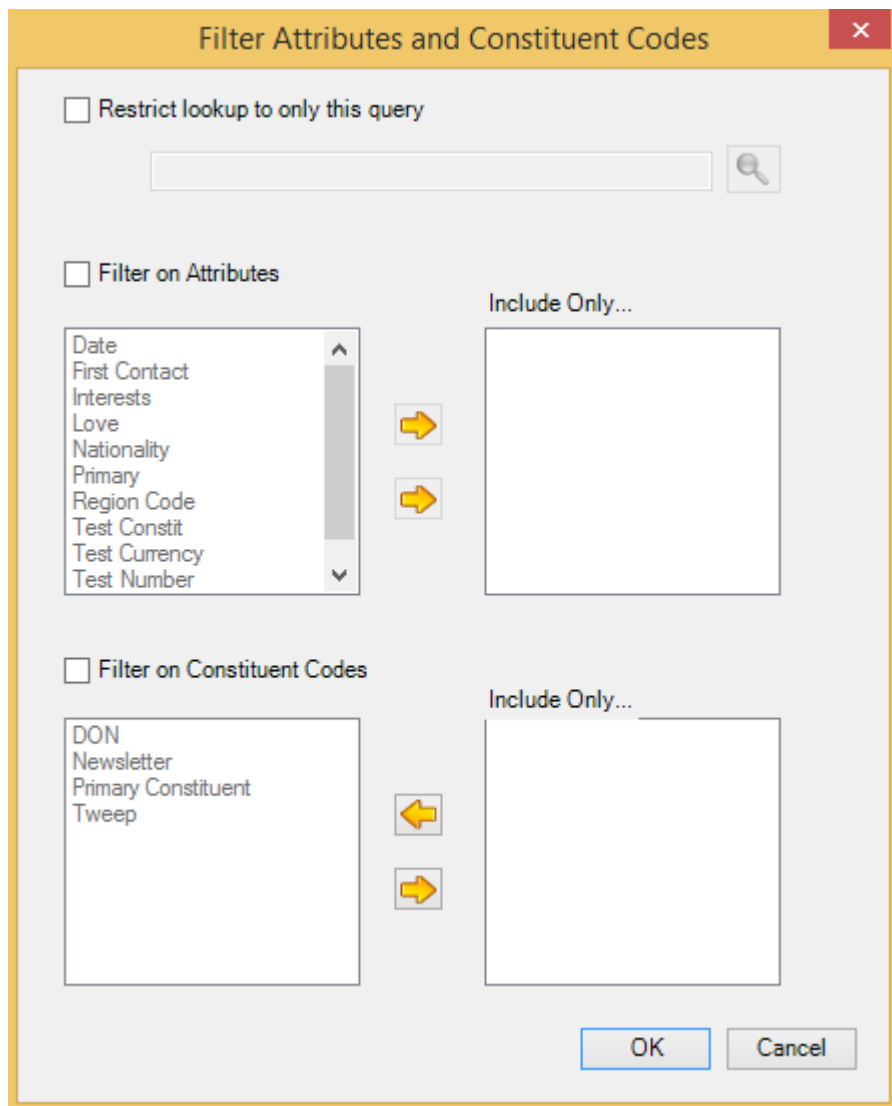
Ma

Latin1\_General\_CI\_AI  
Latin1\_General\_CI\_AI\_WS  
Latin1\_General\_CI\_AI\_KS  
Latin1\_General\_CI\_AI\_KS\_WS  
Latin1\_General\_CI\_AS  
Latin1\_General\_CI\_AS\_WS  
Latin1\_General\_CI\_AS\_KS  
Latin1\_General\_CI\_AS\_KS\_WS

- The '**Maximum matches**' figure allows you to limit the number of matches per record in your search file. Therefore, if there are many duplicates in your database or multiple matches are found for your given criteria, you can limit the number of results returned in the Output file.
- If the '**Do not compare blank values in the file**' tick box is ticked then the lookup will not attempt to compare a blank value in the file with a value on the record. If it is ticked then any blank value in the file will only be a match if there is also a blank

value on the record. For example, when the tick box is ticked, if no first line of the address is given in the file then for there to be a match the address block should also be blank. However if it is not ticked then the record will match no matter what the value is in the address block, blank or otherwise.

- The final function in this section is **'Filter'**. This allows you to filter the search within your database to a query of constituents, specific Constituent codes and/or Constituent attributes. If you click on the **'Filter'** button the following screen will appear:



- You can select a query of constituents that will filter the results. Only the results appearing in the query will be matched against the criteria.
- Here, you have access to your full table of Constituent Code entries and Constituent Attribute entries. Using the arrows you can select as many or as few as you wish to filter on.
- When you have selected the appropriate filters, click on **'OK'**

When the criteria set has been created press **'OK'** to add it to the list of criteria sets to be used for this lookup.

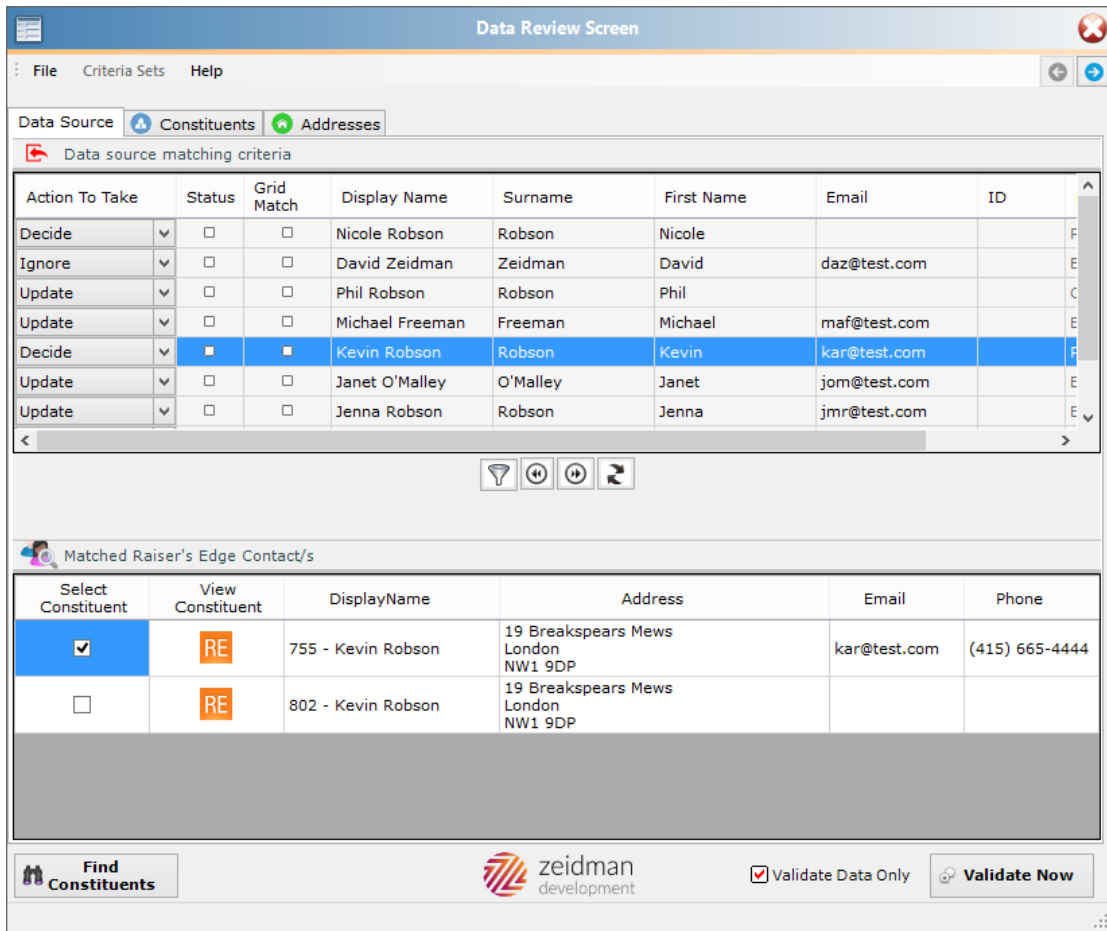
## Review Data

Once your mapping has been set up, you are ready to process the downloaded data. The data review screen allows you to do this.

The screenshot shows the 'Data Review Screen' application. The main table displays the following data:

Action To Take	Status	Grid Match	Display Name	ID	Surname	First Name	Email	Match
Create	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Samuel Zeidman	230749...	Zeidman	Samuel	development@zei...	No
Create	<input type="checkbox"/>	<input type="checkbox"/>	David Ziedman	230749...	Ziedman	David	dzeidman@gmail...	No
Update	<input type="checkbox"/>	<input type="checkbox"/>	John Outlook	230749...	Outlook	John	zeidman@outlook...	Exa
Decide	<input type="checkbox"/>	<input type="checkbox"/>	Kevin Robson	230749...	Robson	Kevin	kevin@zeidman.i...	Poo
Decide	<input type="checkbox"/>	<input type="checkbox"/>	Nicole Robson	230749...	Robson	Nicole	nicole@zeidman.i...	Poo

*Review Screen left-hand side*



The review screen gives you an overview of the incoming data, the matches made to the records, the ability change those matches and the option to update the incoming data.

The data source tab gives you an overview of the data with the matches that have been made. The subsequent tabs correspond to the mapping areas that have previously been setup and displays the complete range of incoming data fields that you have mapped as well as any default values.

## Action To Take

Each entry of incoming data has an action to take value.

Action To Take	Status	Grid Match	Display Name
Decide	<input type="checkbox"/>	<input type="checkbox"/>	Nicole Robson
Ignore	<input type="checkbox"/>	<input type="checkbox"/>	David Zeidman
Update	<input type="checkbox"/>	<input type="checkbox"/>	Phil Robson
Update	<input type="checkbox"/>	<input type="checkbox"/>	Michael Freeman
Decide	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kevin Robson
Update	<input type="checkbox"/>	<input type="checkbox"/>	Janet O'Malley
Update	<input type="checkbox"/>	<input type="checkbox"/>	Jenna Robson

The four options are as following:

- Decide – You need to decide how to proceed (by selecting one of the other options). This appears when there is a poor match in the match criteria.
- Update – Update an existing record in RE with these values. The existing record is selected from the Matched Raiser’s Edge contacts grid.
- Create – Creates a new record in the system
- Ignore – Ignores the incoming data. This will also write the data to the exception report so that you can import it at a later date.

## Match Quality

ID	Match Quality
	Poor Match
	Exact Match
	Good Match
	Exact Match
	Poor Match
	Exact Match
	Exact Match

The match quality on the right-hand side of the grid shows how the match was made according to the criteria sets that you created in the mapping phase. If you did not create any criteria sets but relied upon the default lookup criteria then these values will show accordingly.

The match quality will be a "Poor Match" if the record matches a poor criteria set or if there are multiple matches made to one of the other quality matches.



Whenever a poor match has been made the action to take is set to "Decide".

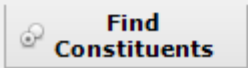
### Match In Grid

Update	<input type="checkbox"/>	<input type="checkbox"/>	Nimberly Halwood	Halwood	Nimberly	21 Stone Newingt...
Create	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lucy Davison	Davison	Lucy	45 Wood Green
Update	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Lucy Davison	Davison	Lucy	45 Wood Green

Depending on the data source, it is possible that you will get two matching entries. From the example above, Lucy gave one day and then a day later decide to give again. Lucy is a new constituent in RE so she is set as create. Before setting the record to create, it does a check in the grid to ensure that the record has not already appeared. That is why the second entry for Lucy is update and not create. It has matched on the previous line and will not create a new entry. The Match In Grid column has the link icon showing that the entry is linked to a previous entry in the grid.

### Matched Constituents

Select Constituent	View Constituent	DisplayName
<input checked="" type="checkbox"/>		756 - Nicole Robson
<input type="checkbox"/>		798 - Nicole Robson



The matched Raiser's Edge Contacts area shows the constituent that have been found in the system. In the case of Nicole there are two matches and we can decide which of them to use. If we need some more guidance we can open the record directly by pressing the RE button in the grid.

If we are not happy with any of the matches we can use the find constituent button to attempt to look them up in RE.

### Filtering and globally updating the grid



Press the left-most button to bring up the filter pane.

Data Source 👤 Constituents 🏠 Addresses

Filter by Action ▾ Update Filtered Actions ▾

🔍 Data source matching criteria

	Status	Grid Match	Display Name	ID	Surname	First
▾	<input type="checkbox"/>	<input type="checkbox"/>	Samuel Zeidman	230749...	Zeidman	Samu
▾	<input type="checkbox"/>	<input type="checkbox"/>	David Ziedman	230749...	Ziedman	Davie
▾	<input type="checkbox"/>	<input type="checkbox"/>	John Outlook	230749...	Outlook	John
▾	<input type="checkbox"/>	<input type="checkbox"/>	Kevin Robson	230749...	Robson	Kevin
▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Nicole Robson	230749...	Robson	Nicole

<

You can filter the items in the grid using the Filter by Action dropdown:

Data Source Constituents Addresses

Filter by Action Decide Update Filtered Actions

Data source matching criteria

Action To Take	Status	Grid Match	Display Name	ID	Surname	First M
Decide	<input type="checkbox"/>	<input type="checkbox"/>	Kevin Robson	230749...	Robson	Kevin

This makes it easier to only see actions of a particular type.

You are also able to update all of the selected items to a new action.

### Viewing and Editing Values

It is possible to drill down and view all of the incoming data and edit it.

Data Review Screen

File Criteria Sets Help

Data Source Constituents Addresses

Data source address area - breakdown

Display Name	City	Type
Samuel Zeidman	London	1540 Fifth Avenue
David Ziedman	London	1-6 Station Road
John Outlook	London	121 Hale Drive
Kevin Robson	London	98 Breakspears Mews
Nicole Robson	Maidstone	86 Beaver Road

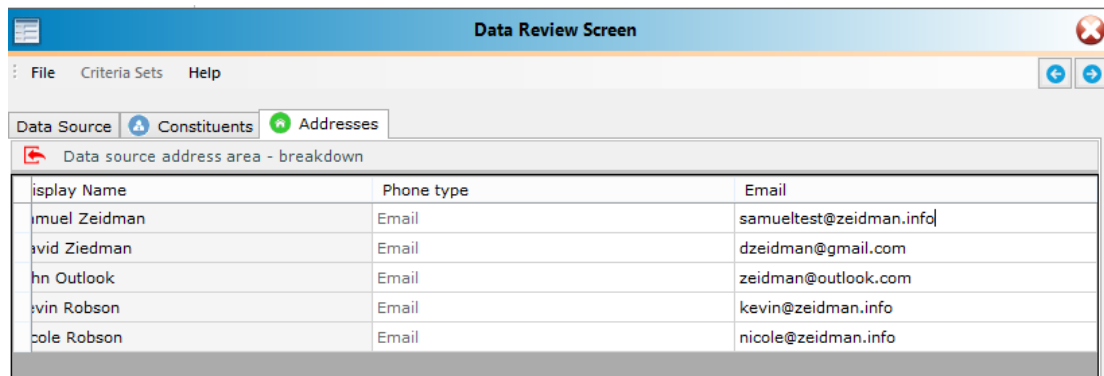
Address mappings overview - Select row to view data to be imported or double click row to open and view mappings

Mapping Name	Area Type	Linked To	Count
Address	Constituent Address	Afternoon Tea	2
Email	Phone	Address	2

Find Constituents  Validate Data Only

If we look at the addresses tab we can see all of the information that has been mapped. In the example above we have selected the email mapping group and can see the name of the individual, the phone type, email address and other fields (not shown).

At this point we can edit the data that we see above. However we are only able to edit incoming values and not values that have been defaulted in the mapping. In the above example the phone type column has been disabled but the email column is editable.



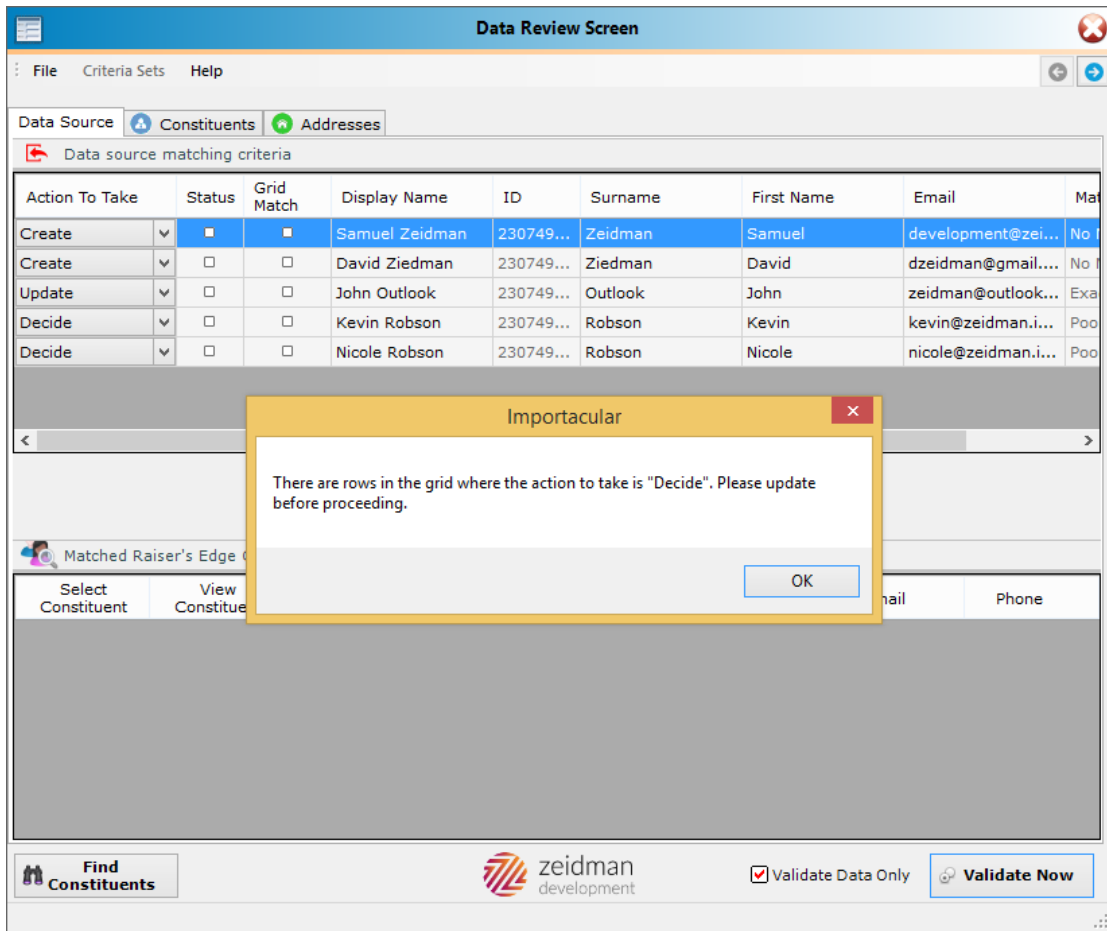
Display Name	Phone type	Email
Samuel Zeidman	Email	samuelttest@zeidman.info
David Ziedman	Email	dzeidman@gmail.com
John Outlook	Email	zeidman@outlook.com
Kevin Robson	Email	kevin@zeidman.info
Nicole Robson	Email	nicole@zeidman.info

We are able to update a value in the grid and it will be imported with all the other data.

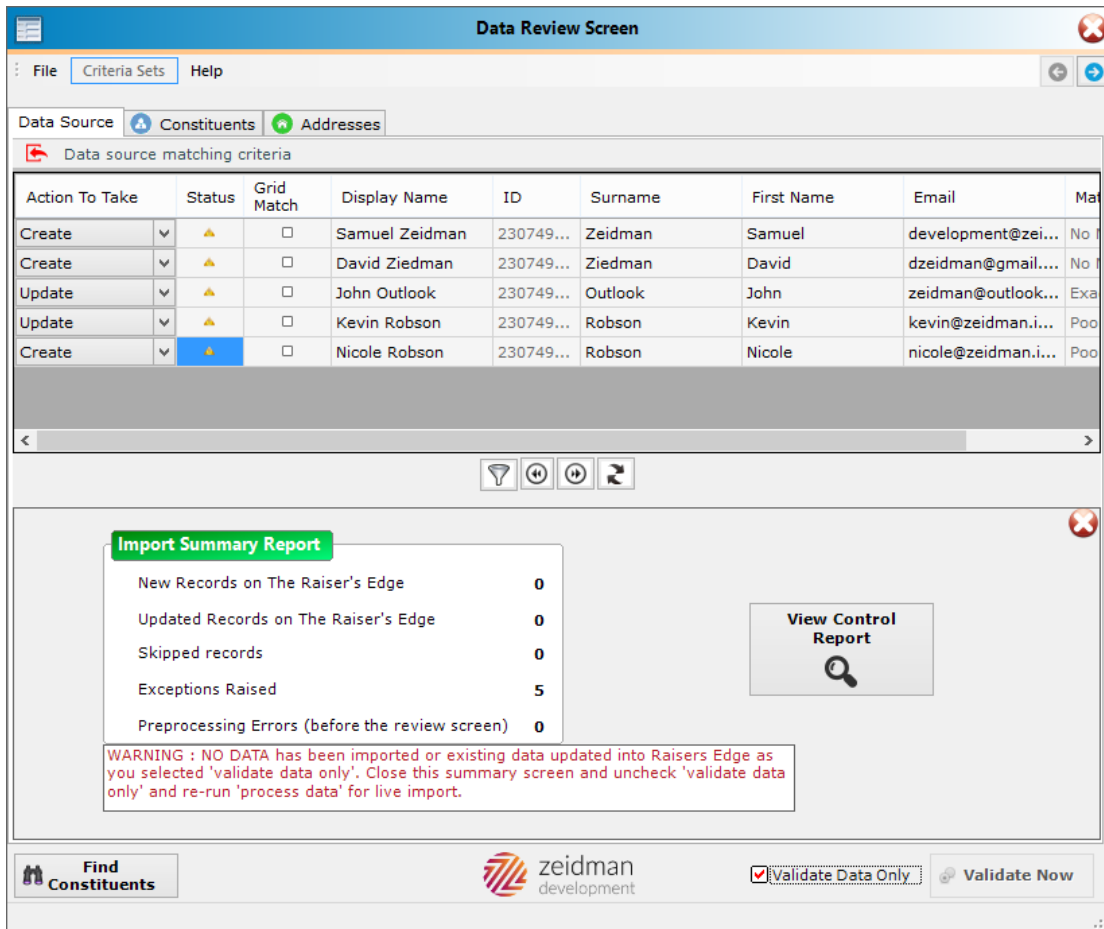
## Validating and Importing

We are able to validate the data before importing. This will perform all the same validation checks without actually saving it to RE. That way if there are errors we can fix them before importing the data.

On pressing the Validate button we get the error shown below. This is because we have not updated the decide values in the grid



Once we have changed those values we are able to proceed.



As the application is processing the record the status column updates to show you what has happened to the records

The summary screen also gives you an overview. If you have entered a control report on the start screen then the View Control Report button will be enabled and you are able to open it and look at the results.

T	U	V	W	X	Y	Z	AA	AB	A
Don_Date	Amount	Row Number	Error Message						
11/03/2015	750	5	Row sent control report						
30/03/2015	25	10	The value "Somerset" in the county field cannot be found in The Raiser's Edge						

The first row is the "Ignore" row that was sent to the control report. The second row is telling us that county value of Somerset does not exist in RE. We can fix that issue in RE and validate again. Once we are happy with the results we can untick the Validate Data Only tick box and we are ready to import the data

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## Resources

For more information about working with any of our connected data sources, see their website:

- [Eventbrite UK](#)
- [Eventbrite US](#)
- [Graduway](#)
- [Survey Monkey](#)
- [Constant Contact](#)
- [FormStack](#)
- [JustGiving](#)
- [WeDidIt](#)
- [VineUp](#)