To import supporters, the import file must be in .xls or .xlsx or .csv format and have column headers that support mapping into the database.

Refer to this table to learn about the available fields and column formatting specifics:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Field Name** | **Type** | **Maximum Character Limit** | **Always Required** | **Required if Field Is Mapped** | **Notes** |
| Supporter ID | Numeric |   |   |   | This field cannot be user defined |
| Supporter Name | Alpha Numeric |   |   | Yes |   |
| Alpha Sort | Alpha Numeric |   |   | Yes |   |
| Informal Salutation | Alpha Numeric |   |   |   |   |
| Formal Salutation | Alpha Numeric |   |   |   |   |
| Supporter Notes | Alpha Numeric |   |   |   |   |
| Date Entered | Date |   |   |   | Recommended Formats:  MM/dd (1/2) MM/dd/yyyy (1/2/2008) dddd, dd MMMM yyyy (Tuesday, 19 March 2008) dd MMMM yyyy (19 March 2008) yyyy'-'MM'-'dd'T'HH':'mm':'ss (2008-01-12) dd-MM-yyyy (01-Jan-2005)  |
| Title 1 | Alpha Numeric | 64 |   |   |   |
| First 1 | Alpha Numeric | 64 |   |   |   |
| Middle 1 | Alpha Numeric | 64 |   |   |   |
| Last 1 | Alpha Numeric | 64 |   |   |   |
| Suffix 1 | Alpha Numeric | 64 |   |   |   |
| Alpha Sort 1 | Alpha Numeric | 10 |   |   | Values are auto generated if not specified |
| Informal Salutation 1 | Alpha Numeric | 256 |   |   | Values are auto generated if not specified |
| Formal Salutation 1 | Alpha Numeric | 256 |   |   | Values are auto generated if not specified |
| Full Name 1 | Alpha Numeric | 127 |   |   | Values are auto generated if not specified |
| Email 1 | Alpha Numeric | 127 |   |   |   |
| Home Phone 1 | Alpha Numeric | 24 |   |   |   |
| Work Phone 1 |  | 24 |  |  |  |
| Mobile 1 | Alpha Numeric | 24 |   |   |   |
| Fax 1 | Alpha Numeric | 24 |   |   |   |
| Primary Phone Flag | Alpha Numeric |  |  |  | Must be either "Home," "Work," or "Mobile" or left blank |
| Title 2 | Alpha Numeric | 64 |   |   |   |
| First 2 | Alpha Numeric | 64 |   |   |   |
| Middle 2 | Alpha Numeric | 64 |   |   |   |
| Last 2 | Alpha Numeric | 64 |   |   |   |
| Suffix 2 | Alpha Numeric | 64 |   |   |   |
| Alpha Sort 2 | Alpha Numeric | 10 |   |   | Values are auto generated if not specified |
| Informal Salutation 2 | Alpha Numeric | 256 |   |   | Values are auto generated if not specified |
| Formal Salutation 2 | Alpha Numeric | 256 |   |   | Values are auto generated if not specified |
| Full Name 2 | Alpha Numeric | 127 |   |   | Values are auto generated if not specified |
| Email 2 | Alpha Numeric | 127 |   |   |   |
| Home Phone 2 | Alpha Numeric | 24 |   |   |   |
| Work Phone 2 | Alpha Numeric | 24 |  |  |  |
| Mobile 2 | Alpha Numeric | 24 |   |   |   |
| Fax 2 | Alpha Numeric | 24 |   |   |   |
| Primary Phone Flag 2 | Alpha Numeric |  |  |  | Must be either "Home," "Work," or "Mobile" or left blank |
| Address 1 | Alpha Numeric | 127 |   |   |   |
| Address 2 | Alpha Numeric | 127 |   |   |   |
| City | Alpha Numeric | 50 |   |   |   |
| State or Province | Alpha Numeric | 50 |   |   |   |
| Postal Code | Alpha Numeric | 50 |   |   |   |
| Country | Alpha Numeric | 50 |   |   |   |
| Alternate ID | Alpha Numeric | 255 |   |   |   |
| Is Business | Yes/No | N/A |   |   | If this field is not mapped, all supporters will be imported as individuals or couples |
| Staff Team | Alpha Numeric | 127 |   |   |   |
| Bidder Number | Numeric | No Limit |   |   |   |
| Bidder Affiliate Type | Alpha Numeric | 127 |   |   |   |
| Bidder Express Checkout | Yes/No | N/A |   | Yes |   |
| Bidder Meal Type 1 | Alpha Numeric | 127 |   |   |   |
| Bidder Meal Type 2 | Alpha Numeric | 127 |   |   |   |
| Bidder Payment Type | Alpha Numeric | 127 |   |   |   |
| Bidder Table Group | Alpha Numeric | 127 |   |   |   |
| Bidder Info | Alpha Numeric | No Limit |   |   |   |
| Bidder Company Name | Alpha Numeric | 127 |   |   |   |
| Donor Affiliate Type | Alpha Numeric | 127 |   |   |   |
| Donor Print Contact | Yes/No | N/A |   | Yes |   |
| Donor Anonymous | Yes/No | N/A |   | Yes |   |
| Donor Type | Alpha Numeric | 127 |   |   |   |
| Donor Do Not Solicit | Yes/No | N/A |   | Yes |   |

**How to import supporters:**

|  |  |
| --- | --- |
| 1. | In the **View** menu, click **Supporters**. |
| 2. | On the **Supporters** page, click the **Import** button. |

|  |  |
| --- | --- |
| 3. | Click the **Browse** button, locate the file to import, and then click the **Open** button. |

**Field mapping**

If you select **Start with default mapping**, Event Software Online will attempt to match the column headers in your file with its field names.

If you select **Start with no mapping**, you must create a proper mapping from scratch.

If you have previously mapped the fields of an import file and saved them to a profile, select **Load mappings from a saved profile**.

**Role options**

You can choose to classify the imported supporters as bidders, donors, staff, or sponsors. You can select more than one role for the supporters.

Click the **Next** button.

Now map the column headers in your import file to the fields in Event Software Online. As you map the field to the existing column headers, notice that green check marks appear.

When you have finished mapping fields, click the **Next** button.

The next step offers you the option of saving your field mapping for future use. When finished, click the **Next** button.

The next step displays how data will be imported. Review this information before committing to your import.

Once you have confirmed that your file is ready to import, click the **Next** button.

The final page summarizes how many records were imported. When you are done, click the **Finish** button.

**How duplicates are recognized upon import**

Event Software Online uses the following logic to merge data when importing or synchronizing databases:

**Rule #1:** Event Software Online will only match supporters of the same type (i.e. Individuals to individuals, couples to couples, businesses to businesses).

**Rule #2:** Users may use alternate IDs to automatically match their records in the system. This is best used when performing a batch update of records. If an alternate ID in the import file matches an alternate ID already in the database, the system will automatically assume the records match. (To batch update records, follow the guidelines in Appendix B to export your data along with alt IDs, update your spreadsheet and then re-import the records).

**Rule #3:** If alternate IDs are not used, the system will search for matching first name and last name and a match on either email address or postal address information. If a record is found with matching first name/last name/email address *or*first name/last name/address, the records will be merged. If using the email address to determine a match, the email address fields cannot be empty. If using the postal address to determine a match, Address 1, City, and State must not be empty, and must match. Address 2, Postal Code, and Country must not conflict (one or both can be empty, but they cannot be different).

**Rule #4:**Event Software Online will merge data from both an existing record and a duplicate record that has been found. If the existing record contains data that is different from the import file, the system assumes that the import file is correct. (e.g. If there is a record in Event Software Online with the State field defined as “OR” and there is a record in the import file that matches the record already in the system except State is “CA”, “CA” will overwrite “OR”.)