

# Advanced Import & Resolution Queue in Salsa CRM

# Agenda

Documentation Cluster

Import in Salsa CRM

Resolution Queue

# Documentation Cluster

# Help Articles

- Before getting started with Advanced Import, we recommend opening the **Advanced Import Documentation Cluster**
- This is a collection of articles meant to teach you how to complete an Advanced Import from start to finish
- You can access those articles [here](#).

## Advanced Import

How to: Import Data into the CRM

Advanced Import Overview

Advanced Import Data File Best Practices

Advanced Import Workflow

Import Constituent Information

Import Spouses with Constituents

Import Donations with Constituents

Import Pledges and Pledge Payments

Import Donations with Spouses as Co-Donors

Import Information to Forms

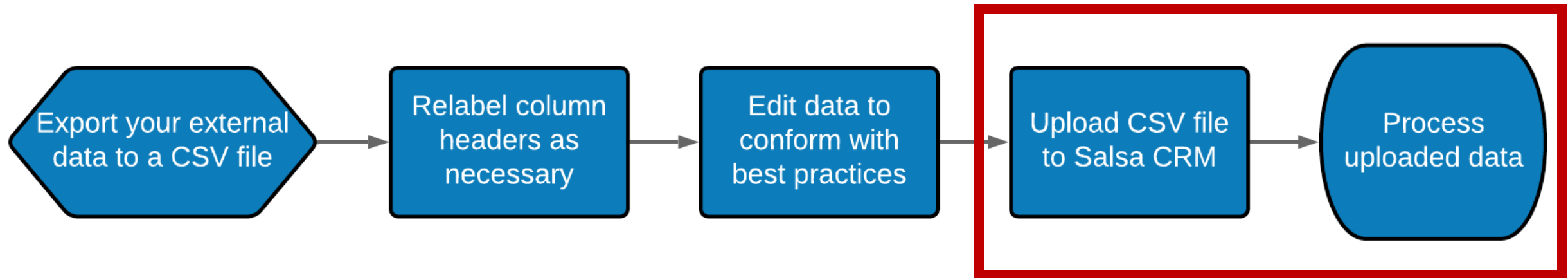
Import Constituent Notes to an Existing Constituent Record

Process Import

Import Multiple Constituents to Multiple Groups

# Advanced Import in Salsa CRM

# Advanced Import Workflow



# Checklist before importing

1. Users importing must have the appropriate **Data-Related Permissions** assigned
2. Confirm your **Column Headers** are named correctly
3. Delete any **underscores** in your column headers
4. Don't exceed **character limits** in your cell or import file name
5. Delete any **trailing spaces** in your cells
6. Save the file as a **.csv**



# Resolution Queue



# Additional Resources

# Additional Training Opportunities

## Other targeted webinars available in Bonterra Academy (live and recorded)

1. Adding Salsa CRM Users
2. Creating Constituents and Supporters
3. Adding Donations
4. Managing Recurring Donations
5. Preparing a Spreadsheet for Advanced Import

Visit the question bubble in your software to find Documentation or the Help Center to find a library of help articles.



Build confidence and knowledge  
in our software.

# Customer Support

Reach out to our Customer Support team with questions or concerns.

**Available Monday through Friday, from 8am until 8pm ET.**

- Submit a Support Request through the question bubble
- Call 866-935-8281

# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.