Preparing Your Organization's Data for the Data Import Team

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Agenda

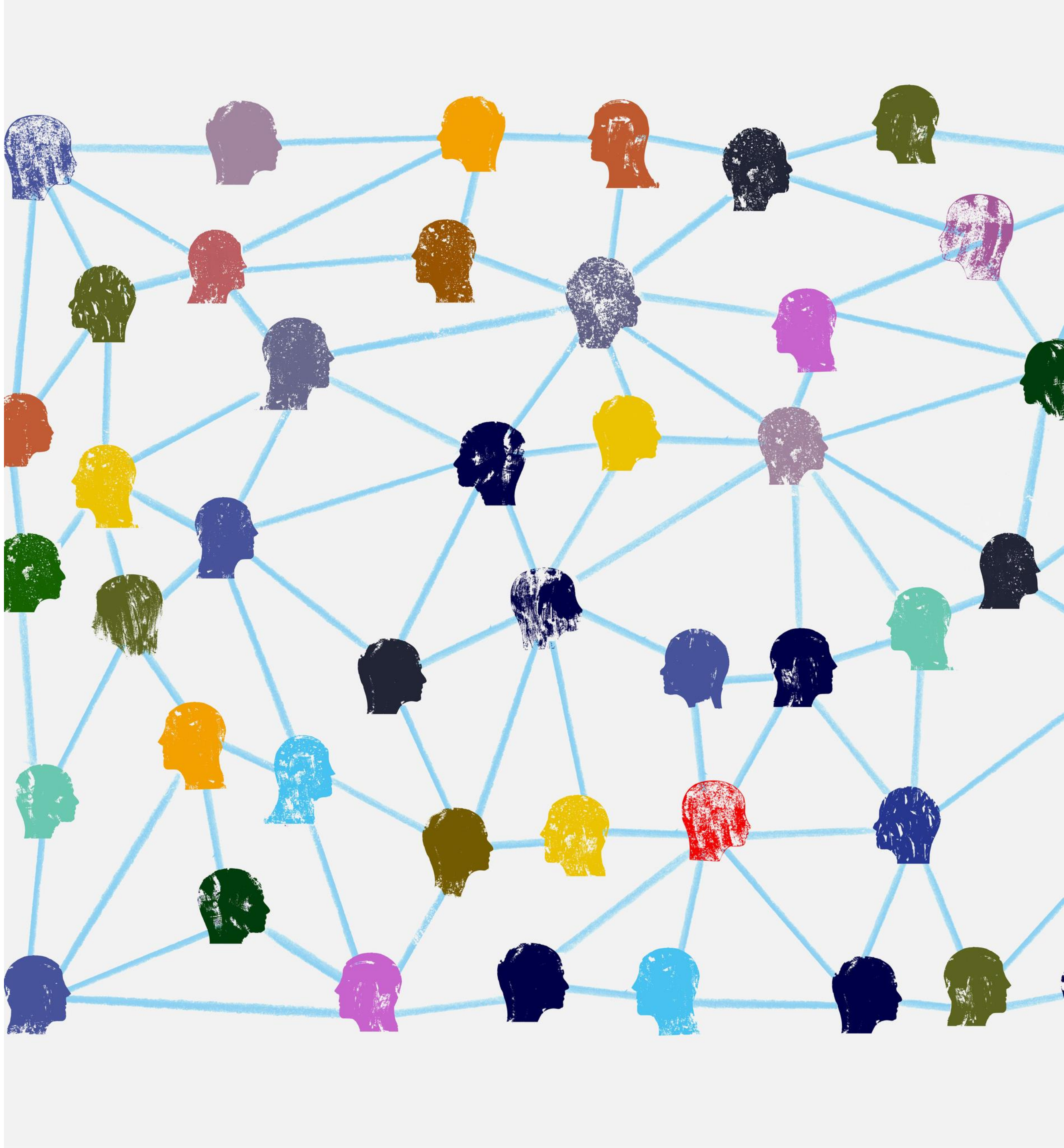
- DMS Organization
- Gathering Your Data
- Preparing Your Spreadsheet(s)
- Send Us Your Files

Donor Management System Organization

Contacts

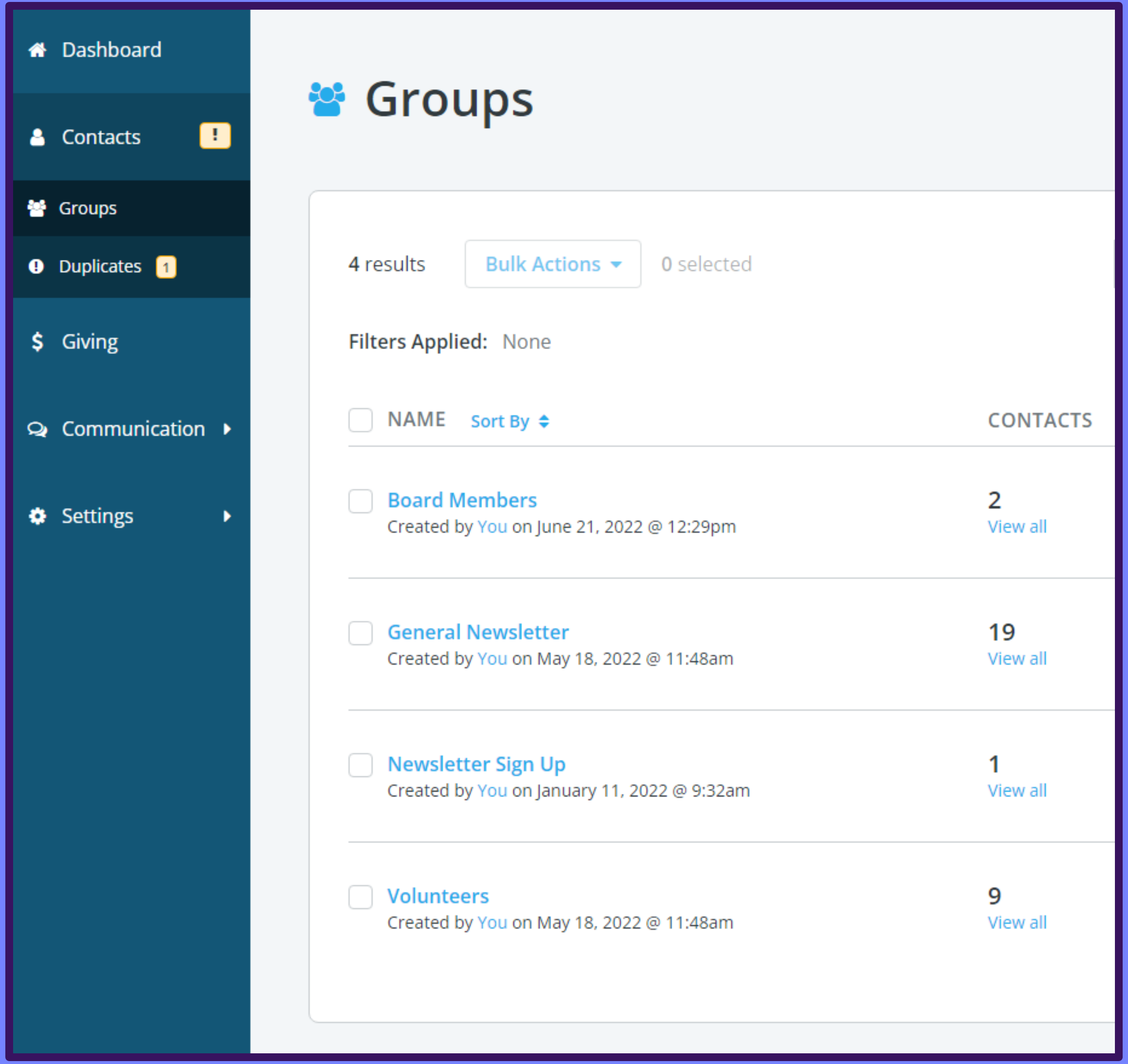
ALL contacts are managed in the **Contacts** tab, regardless of donor status.

- Contacts are segmented as **Individual** or **Organization**
- The only required field for a contact record is **First Name** or **Organization Name**
- You can import any contact information you have:
    - Primary and Secondary Emails
    - Mobile Phone and Home Phone
    - Personal Address
    - Employer Information
  - Gender and Birthdate are available too!



Groups

- Located in the **Contacts** tab
- Great way to segment contacts based on unique identifiers
- Works best for information not naturally in the software, e.g. Board Members and Volunteers
- Perfect for email lists
- You don’t need **Groups** related to donation information. **Filters** will do that for you!
- Manually updated by you when there are changes



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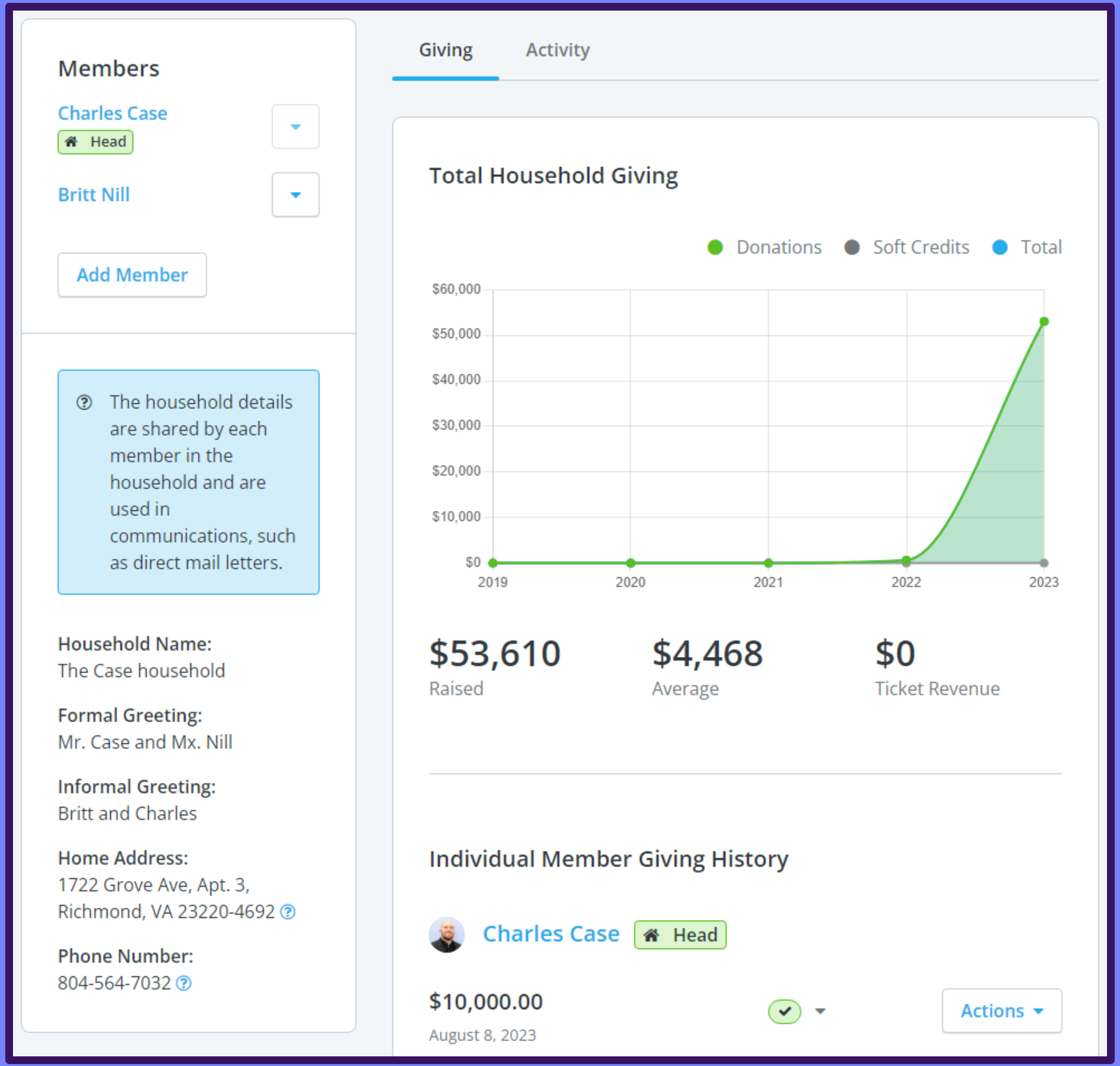
Households

Your Donor Management system works best when *every* person has their own contact record.

- Contacts that share the same address are automatically linked into one **Household**
- Household shows a shared giving history for all Household members, as well as preferred communication
- You can set a **Head of Household** and add additional contacts to the Household
- Important Household fields:
  - **Household Name**, e.g. The Case household
  - **Formal Greeting**, e.g. Mr. and Mx. Case
  - **Informal Greeting**, e.g. Britt and Charles



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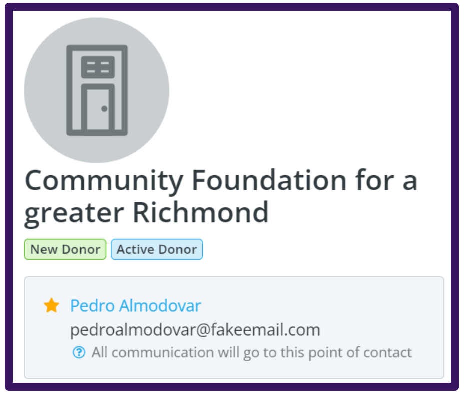
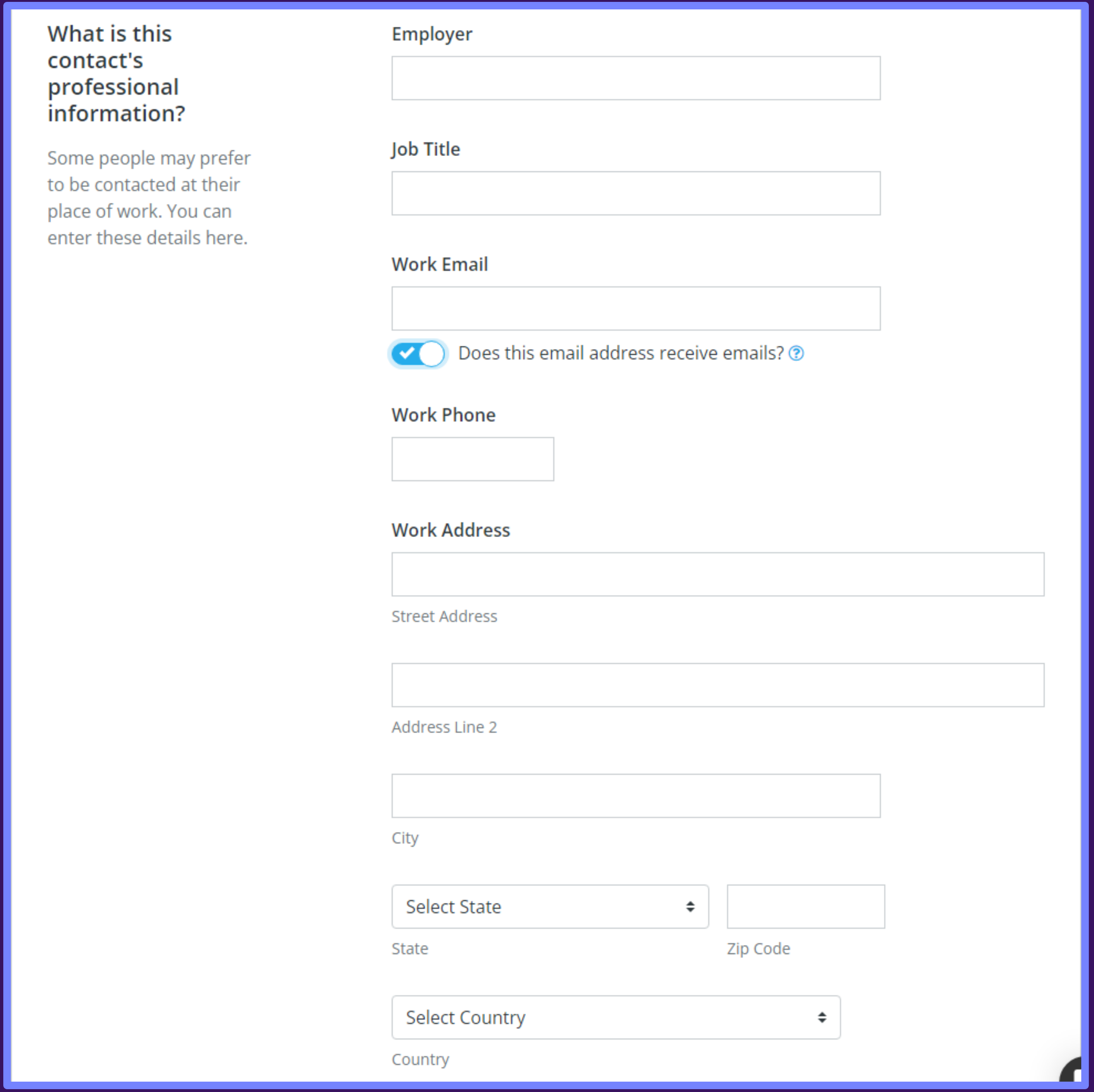
Employer vs. Point of Contact

It's important to ask yourself whether you're interacting with a **Point of Contact** at an **Organization**, or an **Individual** with an **Employer**.

- For Individual contacts, you can add Employer information
- For Organization contacts, you can have one Point of Contact
  - The Point of Contact also has their own contact record





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Giving

The **Giving** tab is home to **ALL** donation records, including online donations from Fundraising Pages, offline donations that you enter, and historical data that is imported.

- There are **FOUR** required fields for a donation record:
  - Donor (name)
  - Donation Date
  - Donation Amount
  - Payment Method
- Optional details include Tributes, Notes, Payment Description, and Acknowledged
- Every donation can be associated with **ONE** Campaign and Designation

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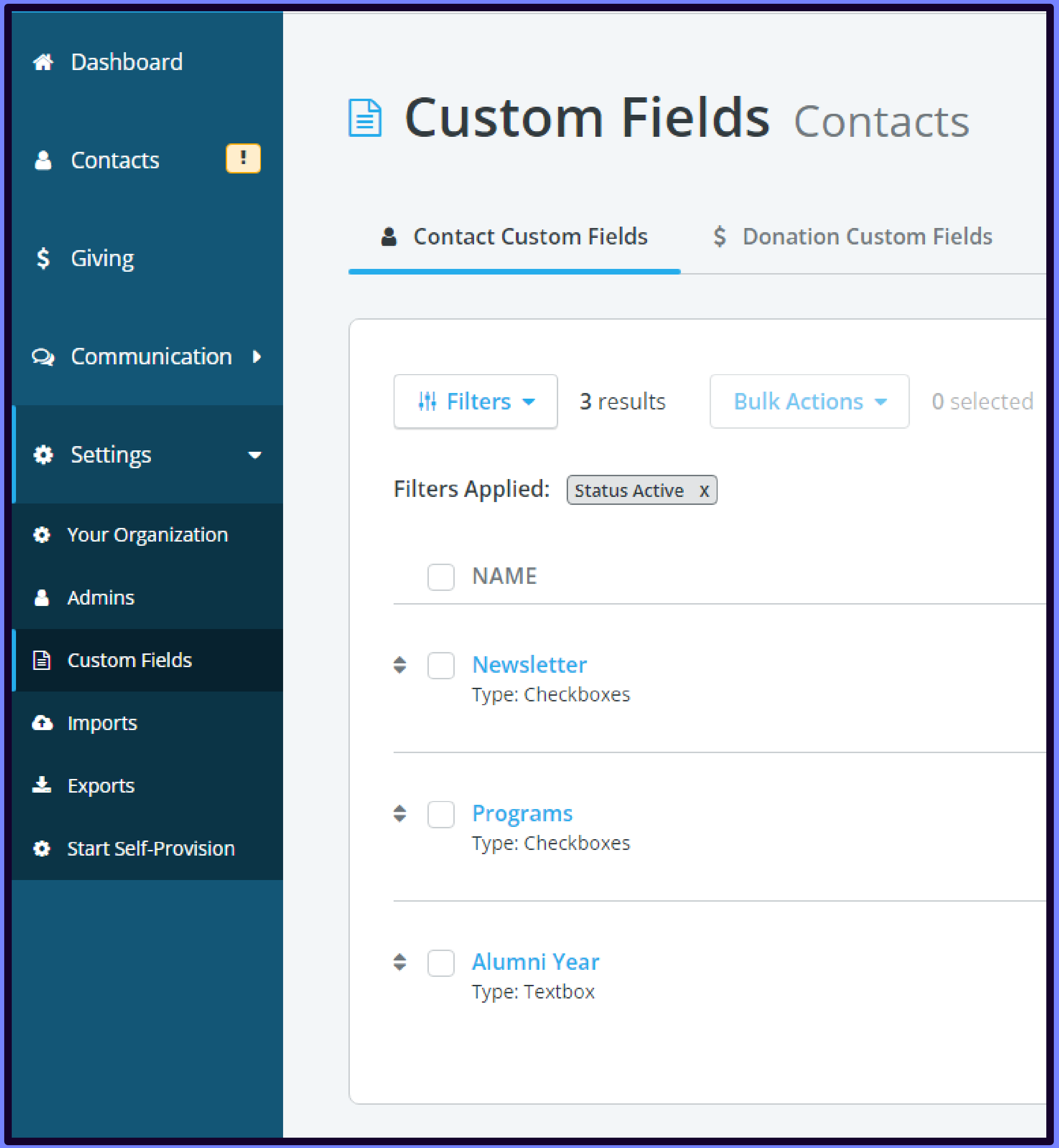
Campaigns vs. Designations

FAQ	Campaigns	Designations
What does it mean in NFG?	Where the money comes from	What the money goes toward
What are some examples?	Fundraising Pages, Events, Appeals	Restricted funds, Programs
Can they be used offline for tracking purposes?	Can include offline campaigns for tracking	Can be on Fundraising Pages for donors and/or offline for tracking
Are they optional?	At least one campaign (general donation page)	Entirely optional

Custom Fields

Do you capture additional information on your contacts that you want represented in your Donor Management System?

- **Custom Fields** can live on any contact or donation record
- You can use Custom Fields to create Filters and narrow down your contacts for a specific list or report
- Some examples of Custom Fields:
    - Alumni year
    - Shirt size
    - Volunteer status



Gathering Your Data

Important Questions to Ask

Where does my existing data live?

- Think about every tool you use to manage and engage with your donors and other contacts
- If you work with a team, be sure to discuss what unique data everyone may have

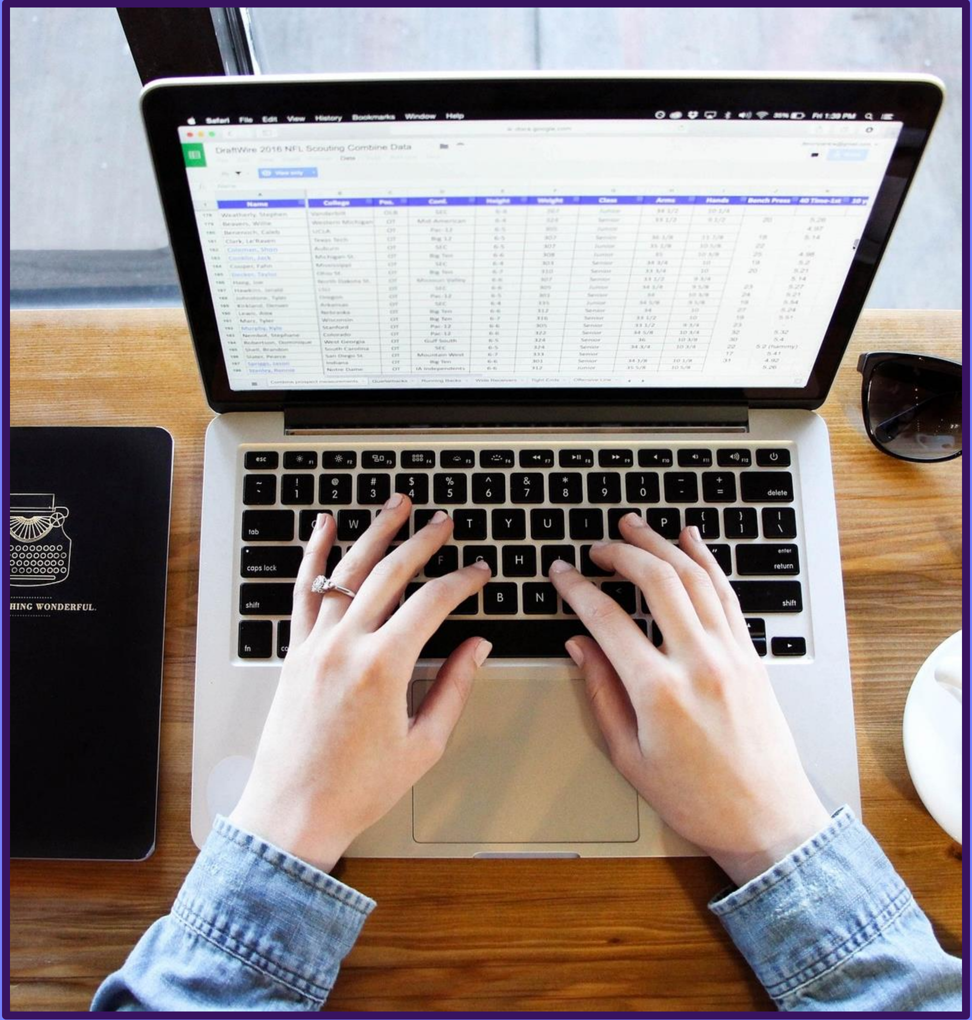
What do I need to export?

- If you use multiple software that house the same data, be careful not to duplicate your efforts
- Consider what information is useful
- Your goal is to export a comprehensive spreadsheet containing all pertinent contact and/or donation information

Exporting

Network for Good can import spreadsheets in **.csv**, **.xls** or **.xlsx** format.

- If you need help exporting your data, try using one of the many walkthroughs we've gathered for you **here**
- If your previous software isn't included in our available list, look for internal articles or reach out to their support team for assistance
- If you choose to import a specific selection of data, it is still recommended that you download a full comprehensive export before you stop using the previous software and keep it for your internal records



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Preparing Your Spreadsheet(s)

Data Import Template

Crafted by the Data Import team at Network for Good, [this template](#) will help you prepare your spreadsheets for import.

- If you are exporting from a previous software or already have formatted spreadsheets, use this template as a **guide** for the mapping of your columns
- If you are building your spreadsheet, treat it as a **template** and put your data in the applicable sheet

Field Type	Field Name	Instructions
Required	**full name - OR - first name***	Use full name when the first and last names in your data are not separated. Otherwise use separate fields for prefix, first, middle, and last names, suffix.
Required	**amount***	Must be a positive number with no punctuation other than a decimal point. (i.e. 12.34 (good), $200,292 (bad)). Must be greater than 0 unless the payment type is 'in kind'
Required	**donation date***	The date of the donation, the date format should be 'yyyy-mm-dd' (i.e. 2015-02-09) or 'yyyy-mm-dd hh:mm:ss' (i.e. 2015-02-09 11:20:00)
Required	**payment method***	Values accepted are: ach, cash, check, credit card, direct, gift card, givecard, in kind, invoice, match, other,
standard contact field	last name	
standard contact field	full address -OR- separate address fields below	Can use full address instead of address, city, state and zip when address is not separated in your data. Address, city, state and zip must be separated by comma or line feed to import properly
standard contact field	address	
standard contact field	address 2	
standard contact field	city	
standard contact field	state	If US or Canada must be valid 2-character USPS state/province code or state/province full name. If not US state,
standard contact field	zip code	US zip or non-US postal code
standard contact field	country	Can be blank for US. Must be present if state is not in the US.
standard contact field	email	Must be a valid email address and contain an "@" and an "." No spaces, commas, brackets,etc. allowed.
standard donation field	campaign	The name of a fundraising campaign that the donation will be attached to. If no campaign is found with the same name, a new campaign will be created.
standard donation field	designation	The name of a program area or similar that the funds are to be directed to. If the name is not found in the
standard donation field	acknowledged	Use any of the following to indicate that the donation has been acknowledged: 'true', 't', 1. Use any of the following to indicate that the donation is not acknowledged: 'false', 'f', 0, or blank
standard donation field	payment description	Donation check number and date (i.e #2034, 02-06-2016), credit card type or other information regarding payment
standard donation field	description	Any text note to be attached to the donation
standard donation field	fair market value	
standard donation field	tribute name	Name of person to be honored/memorialized. If this field is present then tribute type must also be present.
standard donation field	tribute notification m	Must be none, mail, email, or not specified
standard donation field	tribute type	Must be honor, memorial, on behalf or not specified. If this field is present then tribute name must also be present.

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Formatting Contacts

Remember: The only required field for a Contact is their first name or organization name. It's perfectly fine to leave other fields blank for the contact information you don't have!

- In your spreadsheet, an **Individual** contact's name can be represented as **Full Name** *or* **First Name** and **Last Name**.
  - If you only have a contact's email address and no name, copy the email and paste it in the respective name field (seen in Row 5)

- If you're not sure what type of phone number you have, it's best to put it under **Mobile Phone**. If it is a mobile number, this makes it available for you to send text messages.

- In your spreadsheet, a contact's address can be represented as **Full Address** *or* broken down into **Address**, **Address 2**, **City**, **State**, **Zip Code**.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	**Full Name**	**or**	First Name	Last Name	Email	Mobile Phone	Full Address	**or**	Address	Address 2	City	State	Zip Code
2	Charles Case				charlescase@fakeemail.com	2021234567	123 Elm St Richmond, VA 23220						
3	Cory Sterin				corysterin@fakeemail.com	2022345678	456 Main St Philadelphia, PA 65102						
4	Becky Fleming								652 South Ave	Apt. 3	Washington	DC	20001
5	gallowerikway				gallowerikway@fakeemail.com								
6			Terrin	Tropea		2024567890			891 13th St		Washington	DC	20001

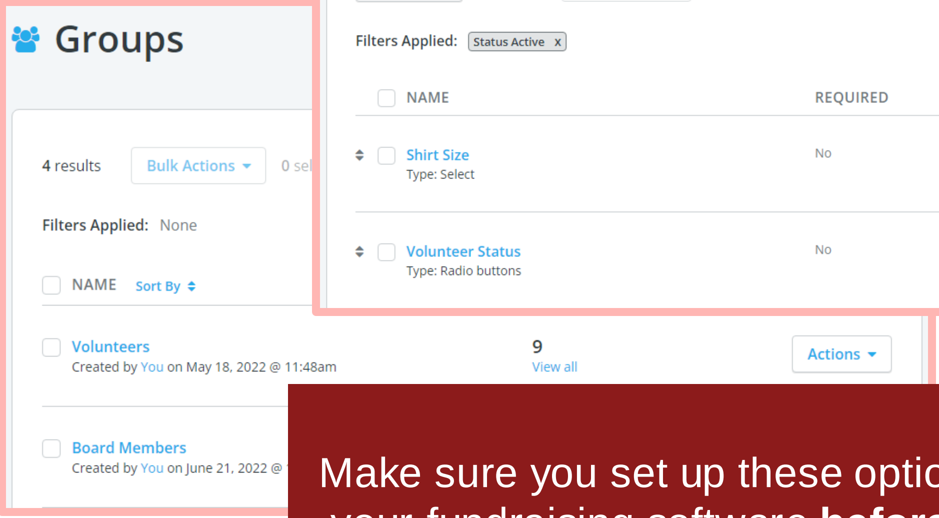
Optional Fields for Contacts

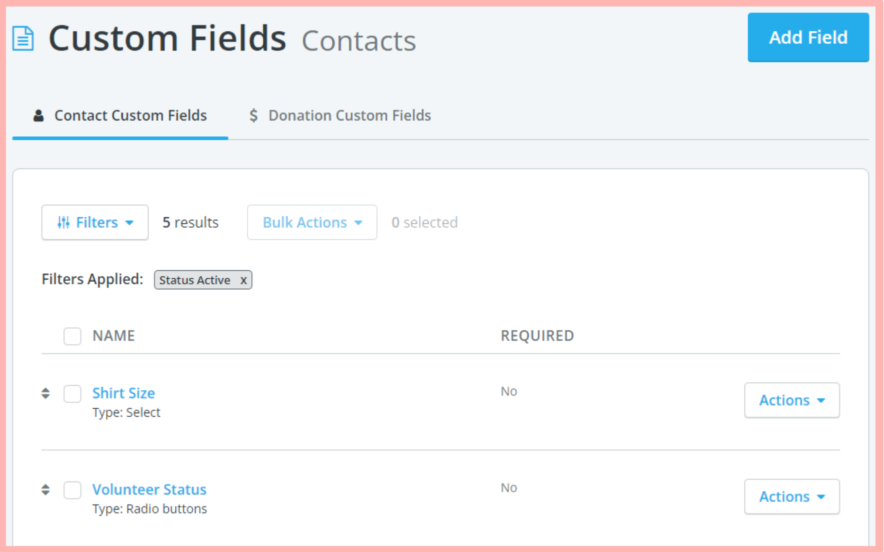
Groups

- In your spreadsheet, name the column **Group** + **Name of Group** (e.g. Group Board Members)
- Place an “**x**” in each corresponding row

Custom Fields

- In your spreadsheet, name the column **Custom Field** + **Name of Custom Field** (e.g. Custom Field Alumni Year)
- Enter the data into each corresponding row





Make sure you set up these optional fields in your fundraising software **before** importing!

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Group Board Members	Group Volunteers	Custom Field Shirt Size	Custom Field Volunteer Status
2	Charles	Case	charles@fakeemail.com	x		XXL	Active
3	Liz	Ragland	liz@fakeemail.com	x			
4	Erik	Galloway	erik@fakeemail.com	x			
5	Becky	Fleming	becky@fakeemail.com	x			
6	AJ	Alexander	aj@fakeemail.com		x	Medium	Active
7	Terrin	Tropea	terrin@fakeemail.com		x	Medium	Active
8	Cory	Sterin	cory@fakeemail.com		x	Medium	Active

Formatting Donations

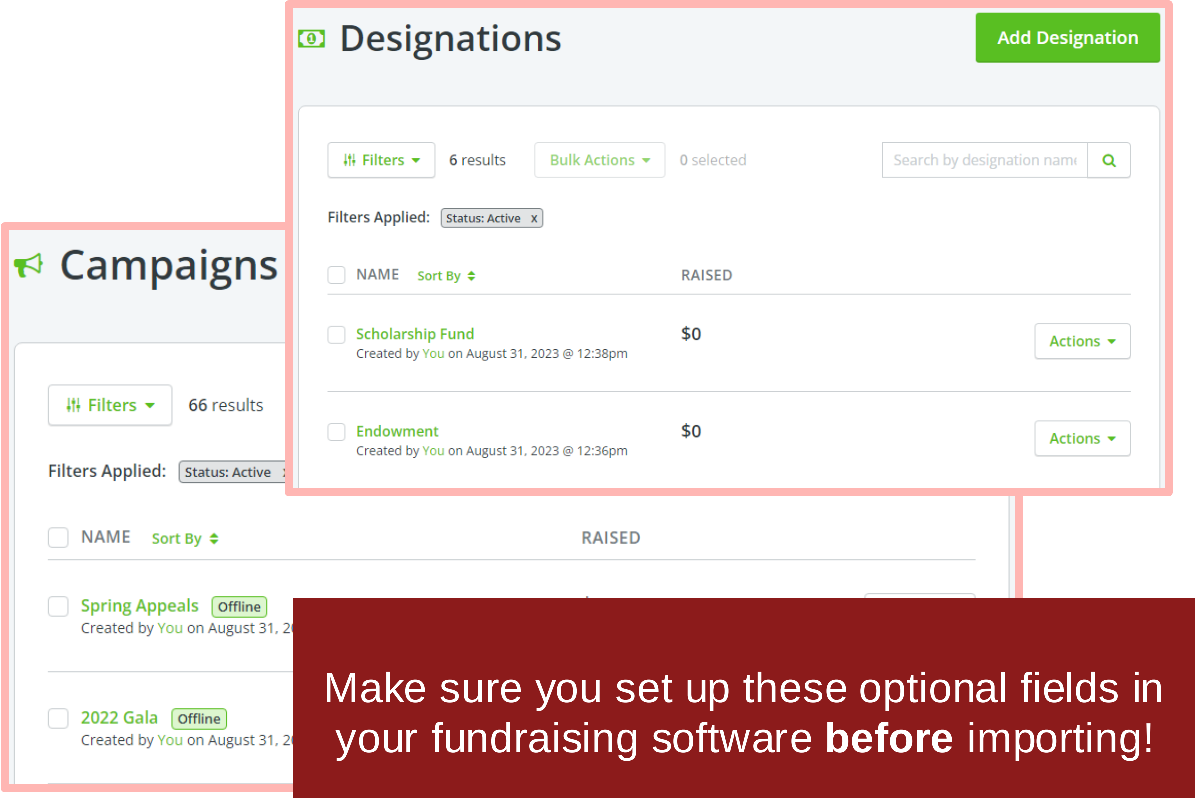
Remember: The required fields for a donation record are Donor (name), Amount, Donation Date, and Payment Method.

- In your spreadsheet, *every* donation has its own row. Do not import the "total donation amount"
- To avoid duplicates, contacts with multiple donations should have another unique identifier, such as Email or External ID. This ensures only one Contact is created during import
- If you do not know the **Payment Method**, you can use **Other**

	A	B	C	D	E	F
1	First Name	Last Name	Email	Donation Date	Amount	Payment Method
2	Charles	Case	charlescase@fakeemail.com	2023-06-21	20	Credit Card
3	Charles	Case	charlescase@fakeemail.com	2023-08-10	50	Check
4	AJ	Alexander	ajalexander@fakeemail.com	2022-01-01	1000	Credit Card
5	Liz	Ragland	lizragland@fakeemail.com	2022-07-04	100	Cash

Optional Fields for Donations

- Campaigns
  - In your spreadsheet, add a **Campaign** column
  - Enter the Campaign name in each corresponding row
- Designations
  - In your spreadsheet, add a **Designation** column
  - Enter the Designation name in each corresponding row



Make sure you set up these optional fields in your fundraising software **before** importing!

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Email	Donation Date	Amount	Payment Method	Campaign	Designation
2	Charles	Case	charles@fakeemail.com	8/31/2023	60	Credit Card		Endowment
3	Charles	Case	charles@fakeemail.com	8/31/2022	60	Credit Card		Endowment
4	Erik	Galloway	erik@fakeemail.com	5/10/2023	25	Credit Card	Spring Appeals	
5	Becky	Fleming	becky@fakeemail.com	9/12/2022	100	Credit Card	2022 Gala	
6	AJ	Alexander	aj@fakeemail.com	12/30/2021	50	Credit Card		
7	Terrin	Tropea	terrin@fakeemail.com	3/6/2022	1000	Check	Spring Appeals	Scholarship Fund
8	Terrin	Tropea	terrin@fakeemail.com	4/2/2023	2500	Check	Spring Appeals	Scholarship Fund

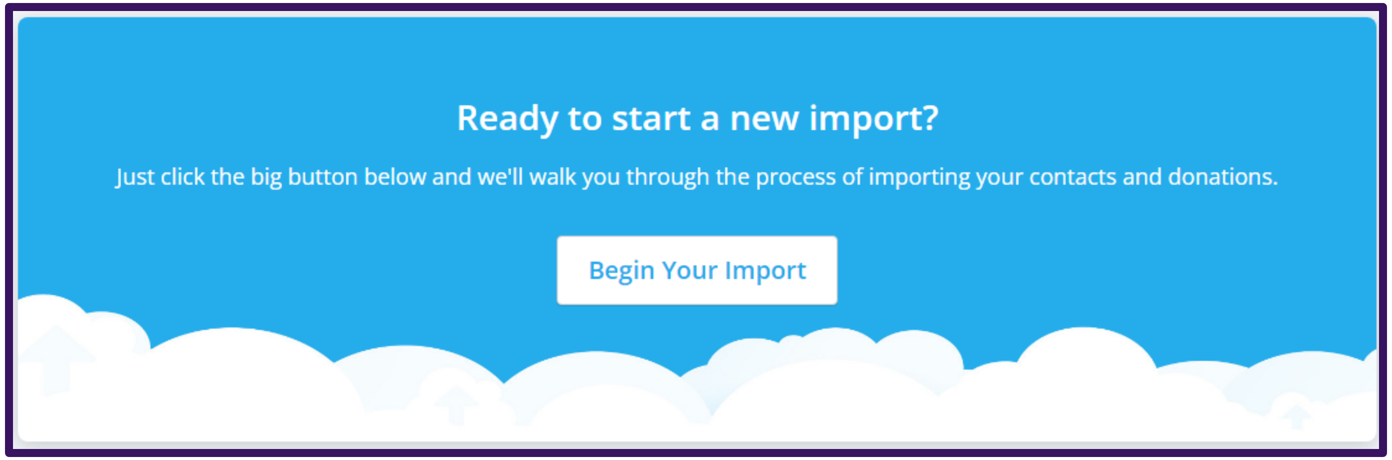
Send Us Your Files

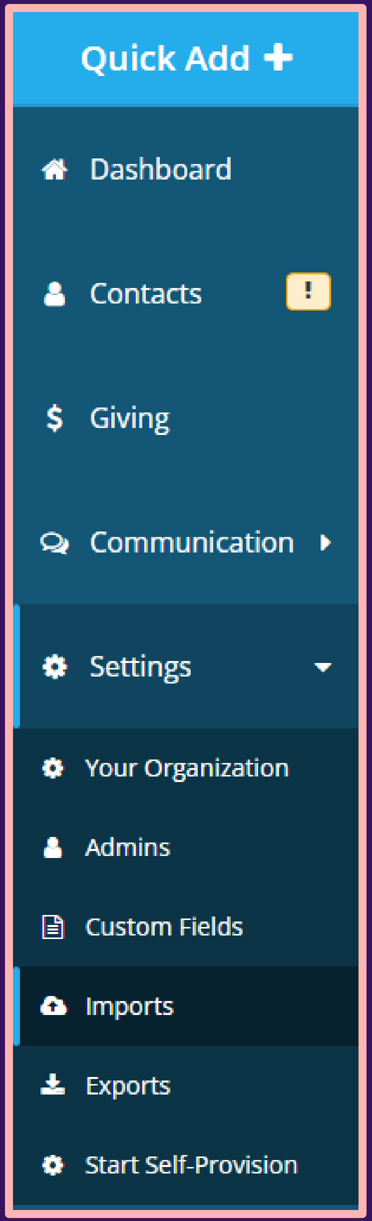
Self-Importing vs. Sending in to the Data Import Team

Self-Import	Data Import Team
Used anytime	Paid service
Import as many times as needed	Send all spreadsheets at **one** time
Imported as soon as you're ready	2 – 4 week timeline in most cases, with a 5-week deadline once the process starts
Can import both individual and organization records	Can import both individual and organization records
Set up Groups, Custom Fields, Campaigns, and Designations in spreadsheet and software	Set up Groups, Custom Fields, Campaigns, and Designations in spreadsheet and software
Download an error file to correct any information that was unable to import	Review data after import and express any concerns to team

Where to Import

1. In your Donor Management system, go to **Settings** and then select **Imports**
2. Select **Begin Your Import**
3. Follow the prompts to **Send us your files**





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Additional Resources

Additional Learning Opportunities

Other webinars available in Bonterra Academy (live and recorded)

1. **Foundational Webinars**

   Tailored to help you accomplish major tasks in Network for Good.

2. **Advanced Webinars**

   Unlock the more advanced functionalities for skilled users.

3. **Coaching Webinars**

   Provide best-practice advice to maximize fundraising and engagement efforts for nonprofits.

4. **New Product Release Webinars**

   Deep dive into newly released features!

5. **Ask the Experts Q&A Webinars**

   Connect directly with Bonterra experts and get answers to your questions!

Build confidence and knowledge in our software.

https://bonterratech.com/training#network-for-good

Contacting the Customer Support Team | 8am – 7pm ET

Chat

- In-app messenger support for quick, technical questions
- Blue dot in bottom right corner of system
- Expect a reply in 2-3 hours

Email

- success@networkforgood.com
- Dedicated team to resolve product problems and questions
- Expect a reply in 2-3 business days

But first!

You can access **View Guides and Help Articles** in the Help tab in your software to find a comprehensive library of articles, guides, walkthroughs, and videos.

Q & A

- Ask questions about functionality covered in this training
- 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.

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