Gathering & Preparing Data For Your Import

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Agenda

Gathering Data from External Sources

Considerations Prior to Uploading

The EveryAction Import Template

Best Practices for Prepping Your Data

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Let's get ready to roll!

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Gathering Data from External Sources

Ideally, data from your current CRM or sources should be readily downloaded or prepared as a spreadsheet.

If you do not have access to Microsoft Excel, you may use Google Sheets (free) to prepare your import file as well.

This file should contain all data regarding your:
- Contacts (supporters)
- Contributions (gifts or donations)

And while not required, can contain details like:
- Email Lists
- Groups
- Gift or contact coding information

-or-

.csv
.xls
.xlsx

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Considerations Prior to Uploading

- EveryAction's Bulk Upload Tool will error out if there are parentheses within the original file name. Ensure these are not present.

- Your file should be under 20MB in size.

- This does *not* have to be a complete list of your contacts and contributions. Bulk uploads can be done repeatedly, if needed.

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Let's move on to data preparation.

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The EveryAction Data Upload Template

The Upload template provided during this session is key for properly uploading your data into EveryAction.

It contains a full breakdown of what data is applicable to what fields, based on its use in EveryAction.

Please be sure to keep this as a guideline as this will be an invaluable tool in ensuring that your first Bulk Upload test is seamless.

	A	B	C	D	E	F	
				Conditionally			
1	Functional Area	Column Header	Required?	Required?	Format	Default Value	N
2	Contact						
3							re... If ro If sa
4		Contact Type	Yes		Alpha-Numeric	Individual	
		External ID	Yes		Alpha-Numeric		If at
5		Organization Common Name		Yes	Alpha-Numeric		If re If
6		Organization Official Name			Alpha-Numeric		O bl E

Field Key_Requirements   Directions   1. Example (Combined)   2a. Example (Supporters)   2b. Example (Donations)

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Let's explore the template a little deeper!

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Best Practices in Preparing to Bulk Upload

- Fields that are user created, like Source Codes, Activist Codes, Custom Fields, or Tags should be created prior to uploading data. This way, your first batch of data can include values for these fields for contacts.

- While not required, it is highly recommended that Organizations and Individuals be uploaded separately.

- Your file cannot contain more than 50 columns of data.

- Confirm that Contact fields adhere to EveryAction's expected formats:
  - Email – ensure that the domain is correct (gmail.con vs. .com)
  - Phone Number - can only be 10 digits (Area Code + Number)

- **Only upload with a sample of your data for the first time.**
  - **This can be 10-15 records, in any order, from your main list.**
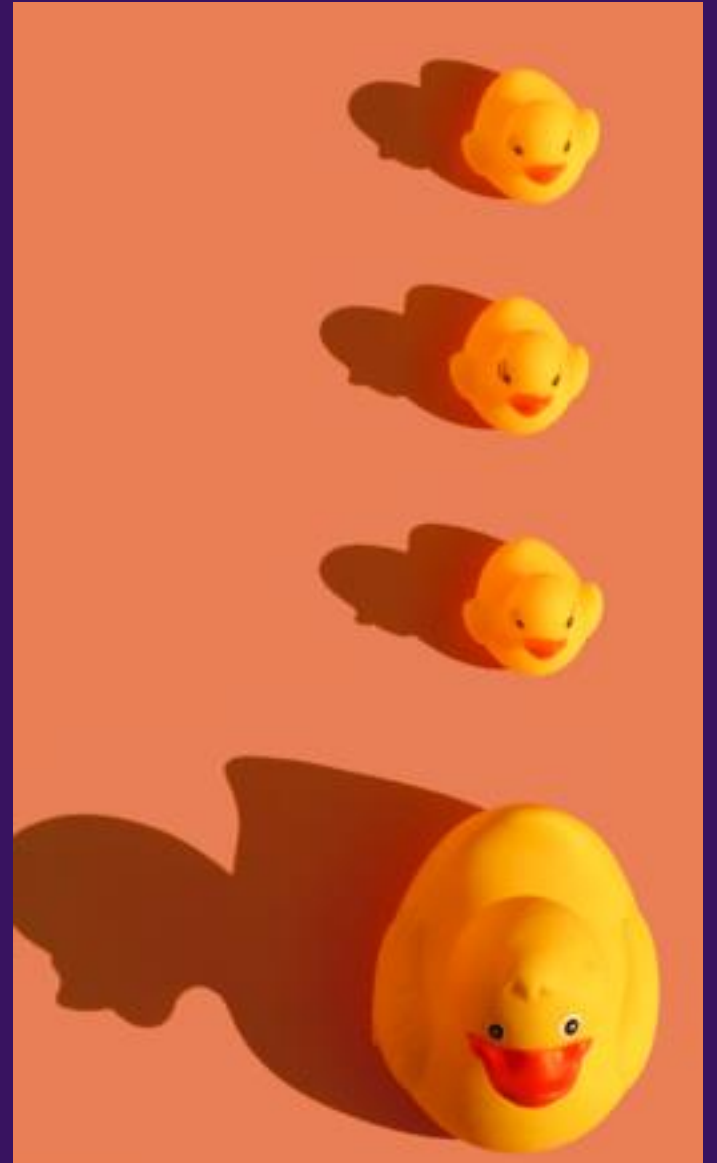
Helpful Hints: Contacts

As data will vary from organization to organization, you may have additional or fewer fields when doing your Upload. The example below is centered around Individual Type Contacts that also include Activist Code and Custom Field data.

- For our Activist Code (AC_) columns, a "Y" is to mark inclusion in those codes.
- The Custom Field (CF_) column includes an applicable value. In this example, the field is of a numerical entry type.
  - Additionally, the field itself is using the Custom Field's *short name*, as the column header within your upload has a maximum of 20 characters.

A	B	C	D	E	F	G	H	I	J	K
First Name	Last Name	Personal Email	Address Line 1	City	State or Province	Zip or Postal Code	AC_Shelter Members	AC_Animal Protectors	AC_Dog Lovers	CF_DPIY
Jeremy	Elbertson	jerma985@gmail.com					Y		Y	15
Vincent	Price	theghoul@comcast.ne	13 Haunted Drive	Salem	MA	01970		Y	Y	

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Helpful Hints: Contributions

Contributions will have a few required fields, but are fairly straightforward in uploading. Those required fields are:
- Payment Method
- Date Received
- Status
- Amount

While it is possible to intermix Contact and Contribution information, it is recommended to only do so if you are not *also* uploading details like Activist Codes or Custom Fields for the sake of ease.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	External ID	Prefix	First Name	Last Name	Payment Method	Amount	Fair Market Value	Date Received	Check Date	Check Number	Online Reference Number	Status	General Ledger Fund	Source Code
	243	Dr.	Leonard	Hofstetter	Check	$150.00		02/07/2019	02/05/2019	3333		Deposited	Scholarship Fund	Fall 2022
	243	Dr.	Leonard	Hofstetter	Credit Card	$375.00		03/10/2021			786776	Deposited	General Fund	Annual Campaign
	245	Mr.	Stuart	Bloom	Credit Card	$1,000.00		12/30/2019			987535	Deposited	General Fund	EOY Campaign
	246	Dr.	Amy	Fowler	Credit Card	$25.00		04/07/2020			875234	Declined	General Fund	Annual Campaign

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Additional Resources

Additional Learning Opportunities

Currently, EveryAction has an expansive (and growing!) library of webinars available to review tasks like:

- **Creating Online Actions**

- **Sending Targeted Emails**

- **Adding New Users**

- **Creating Contributions**
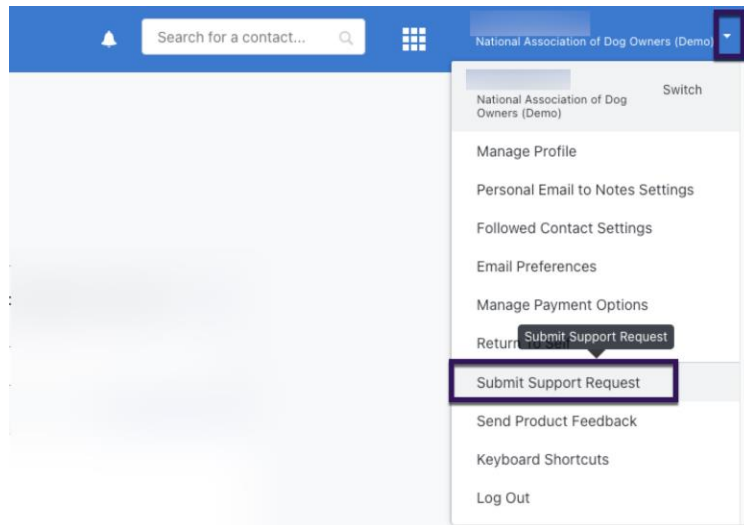
- **Configuring Your Codes**

- **And much more!**

Build confidence and knowledge
in our software.

https://www.bonterratech.com/training#everyaction

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

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!

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Thank you for attending!

We hope to see you
in future trainings.

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