Donate Now

On-line Donations, Ticket Sales and Registrations

Donate Now Import

New gifts were entered to the Donate Now pages on our website.

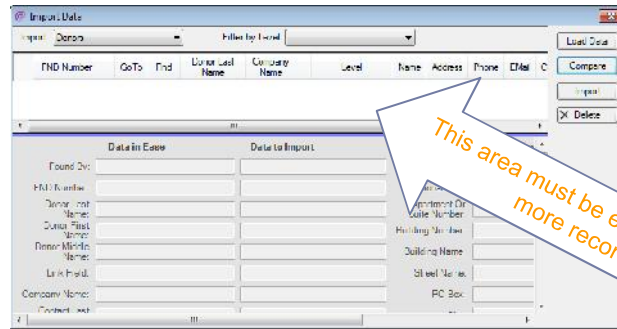We want to import this information into @EASE.

The donations are exported as shown in the last session. We are ready to import these new gifts and transactions into @EASE.
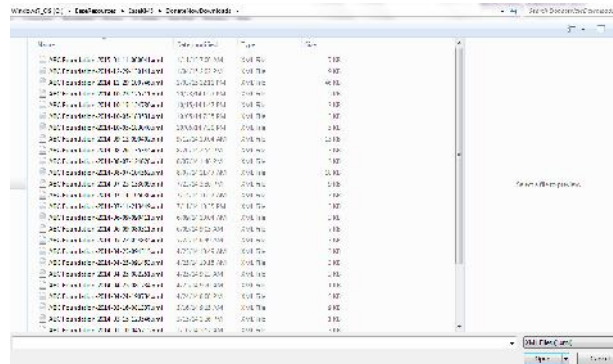
Donate Now Import

To import new transactions, or files of any type, the area shown above must be blank. Existing import records need to have been cleared before a new set can be added.

Click on the Load Data button, top right of the window and move to your download folder.

Donate Now Import

The default file search for this folder is .CSV. You need to change that to .XML to view your downloaded files.

Select the latest download and click Open.

Donate Now Import

The first step with any import is to run the Compare to see if @EASE can find the donors. Are they existing donors or are they new?

You can click and drag to select the records for Compare. We do recommend that where there are many records to import, you click on either the Donor Last Name column title or Company Name to sort the import list. Working with segments of the data to import in a controlled manner is preferred should you need to re-load the records. This enables records already completed to be removed.

Donate Now Import

Compare shows how it determined the Match Level. In this case the first and last name and postal code matched data in @EASE.
@EASE uses several different criteria to search for existing donors. Email and phone number as well as postal code without the name offers Match Levels.
Match Levels include **Match Level 1** – a sure match, **Match Level 2** – looks good but you need to check, **Multiple** – usually when postal codes are the same, these need a lookup or **New Record**.

Donate Now Import

The Williams record needed an Email update. Note that we checked the Email box on their row. Where a field update is missed the Imported Donor box can be unchecked, the change made and Import re-run. You may need to Save first … this is displayed on the menu to the right.

Once all records are imported we can move to the Receipt and Pledge windows.

Donate Now Import

The **Import** pulldown menu enables you to move between the different Import windows. We will be using Receipts for the one time gift and Pledges for the monthly gifts.

Donate Now Import

This is the one time gift we downloaded. Because we used test data the campaign description and amount fields reflect test values.

You can sort the columns by clicking on the column header. Click on Campaign Desc.

To assign a campaign, highlight the rows with the same campaign desc, then right click to get the Assign option and select campaign. You can now select which campaign the donor has given to. Other fields like who acquired the donation, charitable and breakout codes can be assigned **before** import.

Donate Now Import

Once the records are ready, they can be recorded in Receipt Maintenance. Highlight the records you wish to import and click the Import button.
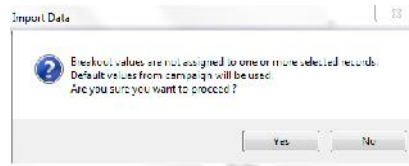

Above we have the full row of fields provided when importing.

Note the **Imported Receipt** box on the far right. Once this record has been imported it will show a check mark. Gift records can only be imported once from this window. The Donor who gave the gift must have their donor information imported.
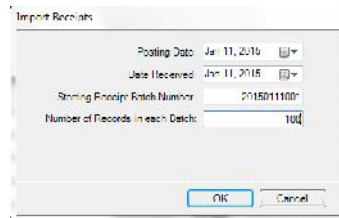
Donate Now Import

Highlight and Import

Default values defined at the Campaign level in @EASE impact on these records. Receipt Required, the Letter field come from the Campaign as does the Breakout Code where it is not given on the Import page.

Click Yes and this window appears. If no receipt date is part of the import, the Posting Date is used. The Date Received is defined at this point.

A message appears if not all donors have been Imported from the Donor window. Donors must be imported to add gifts through the Receipt window.

Batch Numbers can be used to move imported transactions into separate areas for reconciliation.

Click OK and the import will take place. Once imported these records can be removed from the import area by clicking the Delete button.
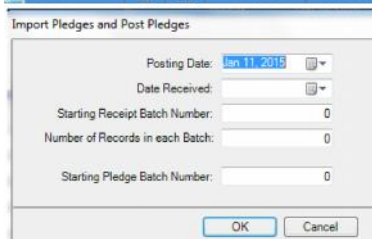

Donate Now Import

Import the Pledge
The Campaign assign has been completed. We will use the default Breakout Codes defined at the Campaign level in @EASE.

The information needed for this import is the same as what we needed for **Receipt** transactions.

The **Pledge Batch Num**ber is assigned to the new pledge master records so you can run the Pledge Batch Report for an audit trail. The Pledge Batch Number has the same format as the Receipt Batch Number.
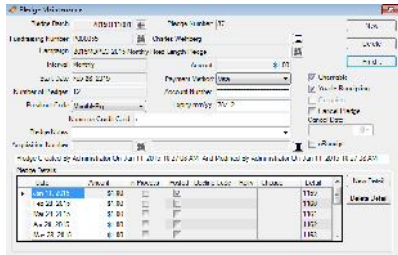
Periodically the **Save** button on the right hand menu becomes active. Changes need to be saved or lost as windows are opened and closed.

Donate Now Import

The Pledge Batch Report shows the entries.
Here is one of the pledge records built by the Pledge import.

Fast, accurate and done with EASE!

This concludes the tutorial.