



@EASE Fundraising Software

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.

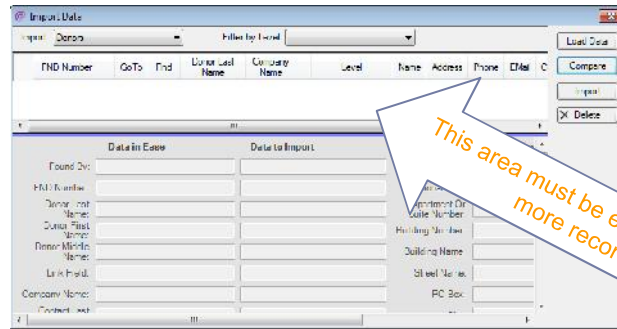
Donations

From Date: To Date: View Downloaded Data

Downloaded	Processed	Private First Name	Private Last Name	Company Name	Contact First Name	Contact Last Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	John	Williams			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Thomas	Winkberg			
<input type="checkbox"/>	<input checked="" type="checkbox"/>			Beloch Group, Inc.	Doug	Sume

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



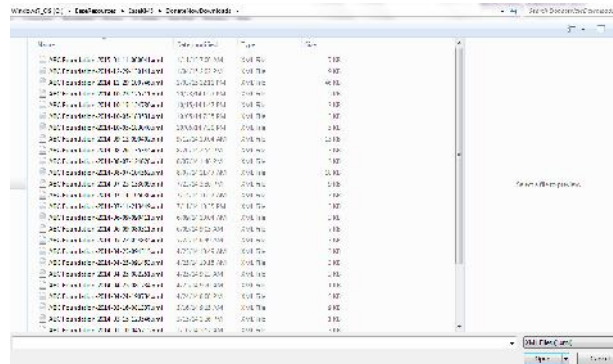
This area must be empty to import more records.

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

FNU Number	Go to	Hinc	Donor Last Name	Company Name	Level	Name	Address	Phone	E-Mail	Contact	Imported Donor
P			Williams								
P			Wambers								
C				Salsch Group							

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

FNU Number	Go to	Hinc	Donor Last Name	Company Name	Level	Name	Address	Phone	E-Mail	Contact	Imported Donor
P300010			Williams		Match Level 2						
P300015			Wambers		Match Level 2						
C300010				Salsch Group	Match Level 2						

Found By		Match to Import		Match to Import	
FNU Number	P300010	First Name	Williams	Address Type	HOME
Donor Last Name	Williams	Last Name	Williams	Optional field	
Donor First Name	Glen	Postal Code	Glen	Assignment Or System Number	
				Building Number	20

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

PHO Number	Gift	Fund	Import Level	Company Name	Level	Name	Address	Phone	Email	Cardless	Imported Donor
1100300	11	11	11	Williams	Match Level 1	Williams				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CU03482	11	11	11	Batch Group	Match Level 1	Batch Group				<input type="checkbox"/>	<input type="checkbox"/>

PHO Number:	1100300	Imported Date:	
Donor Last Name:	Williams	Apartment, City, State, Zip:	
Import Level:	Match Level 1	Matching Number:	11
Imported Name:	Williams	Billing Name:	
Unit Fund:	1100300	State Name:	WV
Company Name:		City:	WV
City:		Zip:	26001
Company Phone:		Phone:	304 333 1111
Company Fax:		Country:	USA
Company Email:			
Phone 1 Phone Type:	Home		
Phone 2 Phone Number:	3043331111		
Phone 2 Phone Type:	Home		
Phone 3 Phone Number:			
Phone 3 Phone Type:			
Primary Email Address:	williams@batch.com		

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

Import	Donor Last Name	Company Name	Level	Name	Address	Phone	Email	Cardless	Imported Donor
Donations	Williams		Match Level 1					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Receipts	Weinberg		Match Level 1					<input type="checkbox"/>	<input type="checkbox"/>
Pledges	Batch Group	Batch Group	Match Level 1					<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

FND Number	Go To	Find	Campaign Desc	Assigned Campaign	Receipt Date	Receipt Number	Amount	Registration Amount	Payment Method	Ticket Number
P000016			Test Demo		1/11/15	0	1	0.0000	Visa	0

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.

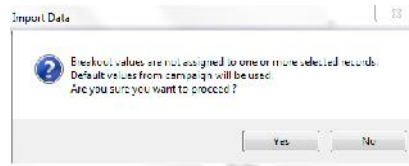
FND Number	Go To	Find	Campaign Desc	Assigned Campaign	Receipt Date	Receipt Number	Amount	Registration Amount	Payment Method	Payment Method	Ticket Number	Mailing List	Receipt Message	Breakout Desc	Assigned Breakout	Acquired By	Assigned Acquired By FND	Charitable	Imported Receipt
P000016			Test Demo	2015DM001	1/11/15	0	1	0.0000	Visa	Yes	0			As Needed		Acquired By	Assigned Acquired By FND	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

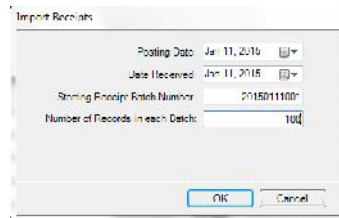


Donate Now Import



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.

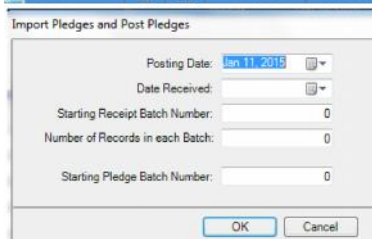


Donate Now Import

Import the Pledge

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

FND Number	Go To	Find	Campaign Desc	Assigned Campaign	Amount	Payment Method
P000055			Fixed 25	2015MOPLG	1	Visa
C002492			Fixed 25	2015MOPLG	1	Visa



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

The **Pledge Batch Number** 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.

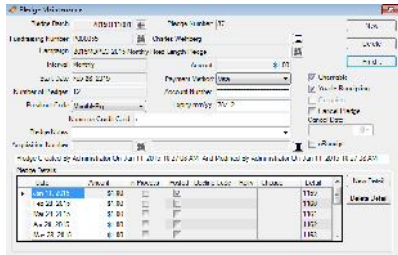
Periodically the **Save** button on the right hand menu becomes active. Changes need to be saved or lost as windows are opened and closed.



Donate Now Import

2015-1-10 10:00 AM
Pledge Batch Report
 1:00 PM 1/10/15 10:00 AM 1/10/15 10:00 AM 1/10/15 10:00 AM

Company	MEM No	First Name	Last Name	Address	City	State	Zip	Phone	Birth Date	Sex	Mar	Religion	Age	
Pledge Batch Name		2015-1-10												
2015-1-10	0001	John	Doe	123 Main St	Anytown	CA	90210	555-1234	01/01/1950	M	Mar	Anglican	65	
2015-1-10	0002	Jane	Doe	123 Main St	Anytown	CA	90210	555-1234	01/01/1950	F	Mar	Anglican	65	
Total													2	\$1200.00



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.