

# The Raiser's Edge™

Import Guide

## **013018**

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## What Is In This Guide?

In the *Import Guide*, you learn to create import files, import new records into *The Raiser's Edge*, and update records in *The Raiser's Edge*. You can also learn about the following.

- “Preparing for Import” on page 8
- “Import File Layout Rules” on page 9
- “Exporting an import file” on page 74
- “Sending an Import File by Email” on page 77
- “Import Recurring Gifts” on page 83
- “Import Tables” on page 95

## How Do I Use These Guides?

*The Raiser's Edge Enterprise* user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the *Raiser's Edge Enterprise* documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://www.blackbaud.com). From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

**Help File.** In addition to user guides, you can learn about *The Raiser's Edge 7* by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter “Load Defaults”. The help file searches for the complete phrase in quotes instead of individual words.



# Import

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With **Import**, *The Raiser's Edge 7* makes it easy to move data from one program to another. **Import**, accessed by selecting *Admin* on the Raiser's Edge bar, is particularly useful if your organization maintains two databases or if you often need to move information in and out of your database.

**Note:** To view a list of the fields available for each import type, see "Import Tables" on page 95.

In **Import**, you can import new records into *The Raiser's Edge*, import updates to existing records in *The Raiser's Edge*, and create an import file of records in your *Raiser's Edge* database to use in another application. All three options are available on the General tab.

**Warning:** You must back up your database before importing new or updated records.

Using the **Create import file** option, you can create an import file containing selected records from your database. You can then send these records outside your organization to be updated. When the updated file is returned, you can use the same import file to import the updated information back into your database.

You can also create an import file using an outside application, such as Microsoft *Excel*. If you create the file using the header names included in the Import Tables chapter of this guide, you can import this new information into *The Raiser's Edge*, using the **Import new records** option on the General tab.

In addition, you can import new records and update existing records at the same time, as long as the import types are compatible, and you follow all importing rules covered in detail later in this chapter.

The fields necessary to import or update information depend on the import type you select. The import types provide access to all related fields found in your database. See "Import Tables" on page 95 for a list of required and optional import fields available for each import type.

To move data in and out of your database using **Import**, you must first identify your import type. For example, are you importing action data? If so, are you working with constituent actions, appeal actions, or event actions? Once you identify the data, you must locate the import type that most satisfies your need. For example, if you are working with event actions, you want to select the Event Action import type, located under the **Constituent** category in the tree view on the Import page. If you are working with constituent name, address, and telephone information, the Constituent import type would be your best choice, because it includes all of the constituent record biographical fields.

**Warning:** If you use the program on a network, we recommend all other users exit the program before you begin importing.

Next, you must define your import. You define your import using the import parameter file. This file is composed of four tabs — General, File Layout, Fields, and Summary. On these tabs, you must select the records from your database you want to include in your import, the operation you want performed, how you want records identified, and an import format. You must also define your file layout and select the fields to be imported/updated.

Once you complete the import parameter tabs and define how you want the information moved into your database, you can save the settings for future use. This saves a great deal of time should you need to run a similar import at a later date.

## Navigating in Import

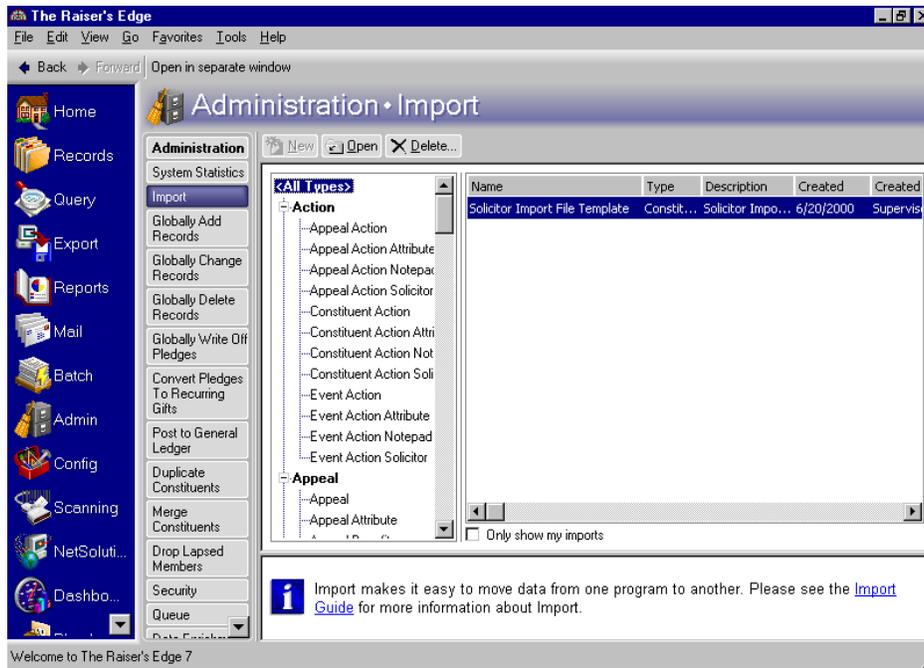
**Note:** For more information about using the menu bar and toolbar, see the *Program Basics Guide*.

**Import** is accessed from the *Administration* page. You move through **Import** using the standard Raiser's Edge menu bar and toolbar.

The Import page also includes a navigation bar to help you move through the parameter tabs, save your settings, and run the import. For more information about the navigation bar, see "Buttons" on page 7.

## Accessing Import

You access **Import** from the Administration page. From this page, you can create a new import, open an existing import, or delete an import.

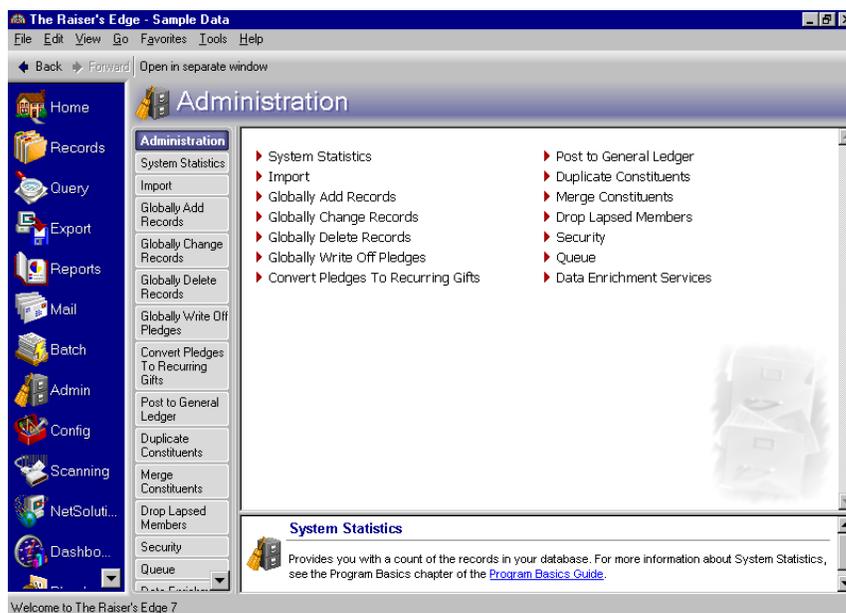


From the tree view on the left, all available import types appear. Under each import type, the categories available for each type display. If the categories are not displayed, click the plus sign next to the import type. By selecting a specific category, you narrow the number of field options offered for each import. For example, if you want to import actions such as phone calls and mailings from a scheduling software program, you can select **Constituent Actions** and search through *all* action fields available in the program, or you can select the **Constituent Action Attribute** category. This restricts the fields available to only those related to constituent action attributes.

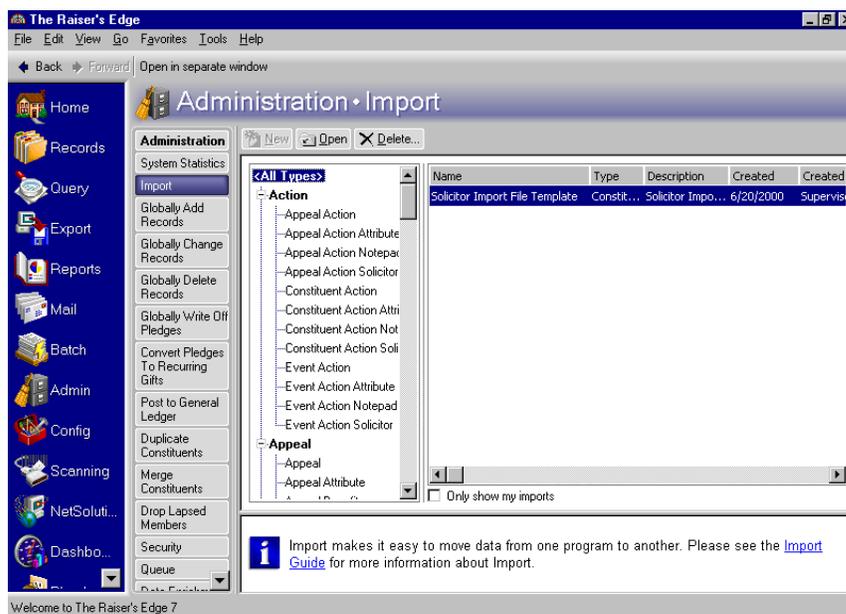
If you save an import parameter file, it appears in the box on the right side of the page. To access a saved parameter file, on the left side of the page highlight the import type under which the file is saved. The list of existing imports appear with the import **Name**, the import **Type**, a **Description** of the import, the date the import was **Created**, who it was **Created By**, and the **Last Run** date.

## ▶ Accessing Import

1. On the Raiser's Edge bar, select *Admin*. The Administration page appears.

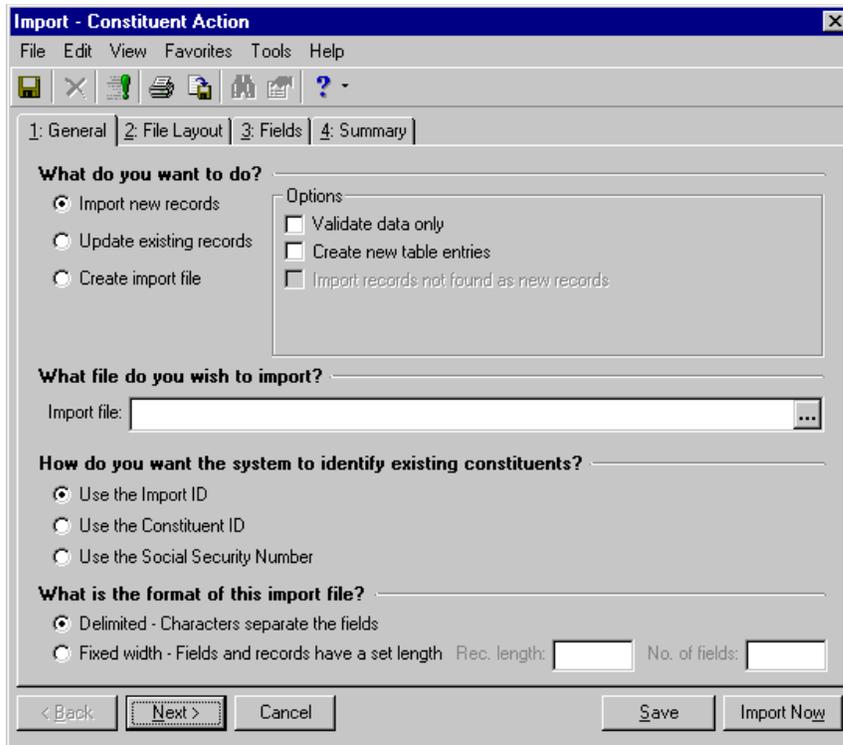


2. Click **Import**. The Import screen appears.



All import types appear in a tree view on the left side of the screen. Information appearing on the right side of the screen depends on the import type you select on the left side and if you have a corresponding import type saved.

- To create a new import, select the import type you want to create, and click **New Import** on the action bar. To open an existing import, select the import and click **Open**. The Import screen appears displaying the General tab.



- To exit and save the parameter file, select **File, Save As** from the menu bar or run the import by clicking **Import Now**.

## Import Toolbar

The toolbar appears near the top of the Import screen, between the menu bar and the tabs. A toolbar is a row of buttons representing commands or functions for a record.



**Note:** You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about setting up this user option, see the General Options section of the User Options chapter of the *Program Basics Guide*.

You can use these buttons as alternatives to menu commands and save time during data entry. On an import record, for example, the toolbar commands include **Save**, **Delete**, and **Help**. Toolbars and menu bars are discussed in detail in the Program Basics chapter of the *Program Basics Guide*.



Save the current import parameter file



Delete the selected import parameter file



Print the Import Summary Report, detailing the criteria and field mapping selected for the import parameter file



Run the selected import



Export the selected import file to another application



View properties for a selected import

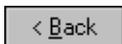


Access help topics

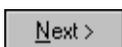
For a detailed explanation of all other toolbar options, see the Program Basics chapter in the *Program Basics Guide*.

## Buttons

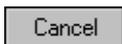
At the bottom of the Import parameter screen, several buttons appear to help you navigate through the tabs and set up your import file.



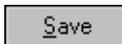
Go to the previous tab



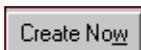
Go to the next tab



Close the screen without completing the import procedure



Save the import parameter file



Create your import file (appears when you select **Create import file** on the General tab)



Import your import file (appears when you select **Import new records** and **Update existing records** on the General tab)

# User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off the workstation, your preferences are not active for any other user.

**Import** has one user option. You can choose to **Automatically save import parameters** on close. The option defaults to off. To change the default, from the menu bar, select **Tools, User Options** from anywhere in *The Raiser's Edge*. Select the Administration tab and highlight the Import category. Mark the **Automatically save import parameter on close** checkbox to activate this user option and click **OK**.

**Warning:** We recommend you limit the access to User Options to experienced users.

Your ability to access User Options is based on your access rights. Access rights are defined from the **Security** link of Administration. For more information about user options and access rights, see the Security chapter in the *Configuration & Security Guide*.

## Preparing for Import

To ensure a successful import, you must properly prepare your data. This means familiarizing yourself with the data you want to import, understanding where you want it to go in *The Raiser's Edge*, identifying all the tables necessary for the import, and making sure you understand the importing process.

Also, we recommend you take preventative measures to ensure the integrity of your database. First, before attempting the import, you must back up your database. If for some reason you cancel the import while in progress or discover after you complete the import the data is not correct, a backup is the only way you can restore your database. We also recommend you run a test import to familiarize yourself with the program and the importing procedures.

The following pre-import checklist should help ensure your imports are a success.

- Back up your database
- If you work on a network, make sure all other users exit *The Raiser's Edge*
- Create a test mapping document, mapping the fields from their current program to *The Raiser's Edge*, using the Import Layout Tables provided at the end of this book. Indicate where you want data from the current program to go in the new program.
- Set up all tables you need for your test import. Tables are set up in *Configuration*.

**Note:** For information about setting up tables, see the Configuration chapter in the *Configuration & Security Guide*.

- Run a validation. This identifies problem areas before you start. You can run a validation by checking the **Validate data only** checkbox in the **Options** frame of the General tab.
- Familiarize yourself with *The Raiser's Edge*
- Try importing the test file
- Review the records. Make sure the information mapped correctly. If not, reevaluate the mapping document and make the necessary adjustments.
- After your test is complete, use the backup to restore your database. You are ready to start importing.

# Import File Layout Rules

**Note:** We recommend you save your imports with detailed descriptions. This makes locating and identifying imports you want to reuse easier. For example, consider entering how the import was used or a summary of the fields you selected.

Before importing data into your database, you must fully understand how the importing process works, how it moves your data, and what determines where the program stores the new information. If done correctly, importing records into *The Raiser's Edge* is an easy, time-saving task. If done incorrectly, it may require a good deal of your time to clean up your database, running queries to ensure the information is where it is supposed to be, and even running global changes. We strongly recommend you acquire a full understanding of the importing process before proceeding with the import.

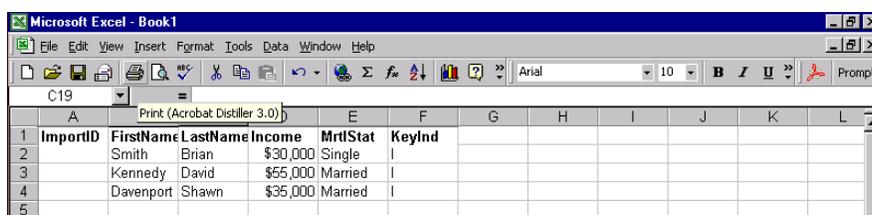
This section describes the general **Import** file layout rules, helping you better understand the overall process.

## Import Formatting Guidelines

- If you are not using a separate header file and on the File Layout tab of the import parameter screen you select **Field names will be on the first line of the import file**, the first line in an import file is the header line or row containing the Import Name of the fields included in the file. The remaining lines contain data records, one line per record. So, in a Constituent import, each constituent is given their own line; in a Gift import each gift is given its own line; in a Constituent Phone import each phone number is given its own line.

**Warning:** We strongly recommend you compose your import file on a Microsoft *Excel* spreadsheet when possible. The spreadsheet allows you to compose the file without worrying about text qualifiers or field separators. Also, remember you can create import files in *The Raiser's Edge*. For more information, see "Creating an Import File" on page 28.

For instance, in the Microsoft *Excel* example below, line 1 represents the import header line. This line contains the names of the import data fields. The actual data starts on line 2.



1	ImportID	FirstName	LastName	Income	MrtStat	KeyInd						
2		Smith	Brian	\$30,000	Single	I						
3		Kennedy	David	\$55,000	Married	I						
4		Davenport	Shawn	\$35,000	Married	I						
5												

- If you choose the delimited import format on the General tab, the format of your import file must follow some specific rules, without which importing is impossible.
  - You must define a format for your imported data. This means, if you are using a word processor, you must use text qualifiers and field separators when entering your data.
  - The first line of the import file should be the header, which gives the names of the fields in the file. You can select to use data with the header record in a separate file. Or, if you have no field names anywhere, you can map the fields directly to *The Raiser's Edge* fields into which you want them imported.
  - Each record in the import file must have a Carriage Return-Line Feed (CR-LF) at the end

**Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

- Remember, when creating your import file in an outside application, such as *Excel*, the fields you can include in the import file are limited, based on the type of import you run. For example, if you want to import constituent information such as name, preferred address, and telephone number, you can enter all of this information in one import file and import the information using the **Constituent** import category. However, if you also want to import participant information for a constituent, such as name tag information and travel arrangements, you must enter this information in a separate import file. The participant information can be imported using only the **Participant** import category.

## Import IDs

- The program uses the IDs you define in the import to search for duplicates, update information, and link records.

When creating records through **Import**, you have the option of specifying an Import ID for the new record or letting the program create the ID. If you want to specify your own Import ID for record you create through **Import**, remember the following:

- Within a particular record type, all Import IDs must be unique. For example, all Constituent Import IDs must be unique, all Constituent Address Import IDs must be unique, etc.
- An ID can contain up to 20 characters
- When using **Import** to *update* records in *The Raiser's Edge*, the program needs to know which records you want to update.

To specify in your import file which constituents you are updating, you can use the constituent's Social Security Number, Constituent ID, or Import ID to identify the record.

- In imports where you do not have to identify the constituent being modified, you need to specify the Import ID of the record you are attempting to update.

**Note:** Campaigns, funds, appeals, and events are exceptions to this rule. When updating these record types, you identify the records you want to update using the Campaign ID, Fund ID, Appeal ID, or Event ID.

For example, in a Constituent Address import, you must include a reference to the Constituent (Constituent ID, Constit Import ID, or SSN) in order to add or update information (add a new address or update an existing one). There are, however imports where information related to constituents change, but the constituent record does not need to be identified. For example, in a Constituent Phone import, to add or modify a phone number, you only need to reference an address import ID, because the address is inherently tied to a constituent.

- If you do not include the Import IDs when you create the import file through **Import**, you can add them later. Using the **Create Import File** option on the General tab of the import parameter file, you can export the Import IDs for the records you are trying to update.

## Attributes

- If in the **Attributes** link of *Configuration* the **Allow only one per Record** checkbox is checked for an attribute and the attribute is already present on the constituent record, the program generates an exception
- If in the **Attributes** link of *Configuration* the **Required** checkbox is checked for an attribute, the program generates exceptions for all records that do not include the attribute

## Import Fields

- Import fields may be imported in any order. We recommend grouping related fields.
- CR-LF is not allowed within a field, only at the end of a record
- CR-LF in memo fields (for example, notepad) is represented by /n

- Unmapped fields and fields containing no data are ignored. To clear a field's contents in the program, enter a caret (^) character [Shift + 6] in the field.
- Import fields for multiple records of the same type must have a two-digit extension number at the end. Extension numbers start with 00 and can go up to 99. For example, if you want to import home phone number and mobile phone number from constituent records, you must identify the home phone number (PhoneNum00) and the cellular phone number (PhoneNum01).
- When importing multiple "child" records of the same type for a single "parent" record, the import fields that relate to the child records must have a two-digit extension number at the end. Extension numbers start with 00 and can go up to 99. For example, if you want to import a home address and business address (two child records) for a single constituent (one parent record) on one line of a Constituent import, you must select some address fields twice, such as City and State. For the program to know which City goes with which State, it will look at the extension numbers. It will know that AddrCity00 goes with AddrState00, and AddrCity01 goes with AddrState01.
- Most record types making up the constituent record can be imported with a constituent import file or as their own import type. For example, you can import constituent codes with a Constituent import type or a Constituent Code import type.
- When importing both individuals and organizations using the Constituent import file, each record is specific to either an individual or an organization. The program ignores fields specific to organizations for individual records and ignores fields specific to individuals for organization records.

## Importing Gifts

- When importing gift records, remember the following:
  - Matching gifts do not automatically import with gift records. You can, however, import matching gifts specifically.
  - If you import a gift with a campaign or appeal but do not specify a fund, the gift appears as an exception. The fund is a required field.
  - Benefit information does not default in the program with the gift information imported. You must include the benefit information in the import file if you want it to import.
  - Receipt amounts do not default in the program with the gift information imported
- The program does not soft credit relationship records when importing gifts to a constituent record. However, you can import soft credit information specifically.
- If you import a gift along with an appeal or solicitor and the appeal or solicitor do not already exist in the constituent record, neither is automatically added to the record. They are, however, imported onto the gift.
- For gift import files, all installments must be in the same file as the pledge. Amounts must equal the total of the pledge. You can have the program automatically add installments for new pledges.
- If you import a pledge, and you want the program to create installments, you must define the installment schedule in the import file and check the **Automatically add installments for new pledges** checkbox on the General tab of the import parameter file.

## Lookup Tables

- Punctuation characters and spaces are important for data contained in lookup tables. For example, the title table contains "Mr.", but your import file mistakenly has "MR" entered for one title. If you marked the **Create new table entries** checkbox on the General tab of the import parameter file, the program adds "MR" to the table, and you now have two table entries for the same title — the correct title "Mr." and the incorrect title "MR".
- In most lookup tables, you can add table entries while importing if on the General tab in *Import*, you marked the **Create new table entries** checkbox.

## Addressee/Salutations

- You cannot add new addressee/salutations to the Addressee/Salutations table in *Configuration* through **Import**
- Use the Add/Sal ID number to import Addressee/Salutations for individuals and organizations. You can get a list of these numbers in *Configuration*. Select **Addresses/Salutations**. From the menu bar, select **File, Print, Addressee/Salutations Report**.

## Currency entries

- You can have up to 10 digits before the decimal point and two digits after (xxxxxxxxx.yy)
- The currency symbol (\$) is not required
- The decimal point and digits after it are required only for uneven dollar units. For example, you can enter two hundred dollars as 200, but you must format twenty-five dollars and fifty cents as 25.50.

## Defaults

- Defaults established in the program do not carry over to imported data

## Addresses

- If you update an address linked to more than one constituent record, the address is updated in all linked records
- In order for the program to recognize separate address lines, (city, ZIP code), you must enter a /n at the end of the line in the file

**Note:** For more information about working on the Configuration page, see the Configuration chapter of the *Configuration & Security Guide*.

- All imported addresses are formatted based on the address format established through the **International** link on the Configuration page. If no country is specified in the import file, the address is formatted based on the address format entered through the **General** link on the Configuration page.

## Relationships

- You can reciprocate relationships when importing if you mark the **Automatically reciprocate relationships** checkbox on the General tab of the import parameter file.

## Quick Reminders

Finally, before importing data, remember the following rules.

- Perform a backup on your database. If importing several sets of data, back up your database after you import each set.
- Perform the import on your fastest computer. If possible, use the file server terminal.
- The more record types you include in a constituent import file, the longer the import takes. If you import multiple record types, consider importing each record type separately.

- If you do not have security rights to certain fields, a warning message appears if you select the restricted field to include in your import. Also, you cannot open a saved import unless you have security rights to all fields included in the import.

## Importing New Records

**Warning:** If you use a mailing house, be aware address lines are imported and exported with the /n between address lines instead of in separate fields. If your mailing house cannot accept this format or the mailing house cannot return the file in this format, you must separate the addresses before you send the file.

You can import information into your database for two reasons: to add new records to your database or to update records already entered in your database. This section details the steps you must follow to import new records. Although the procedure shows you how to import new constituent records, you can apply the same procedure to all import types available in *The Raiser's Edge*.

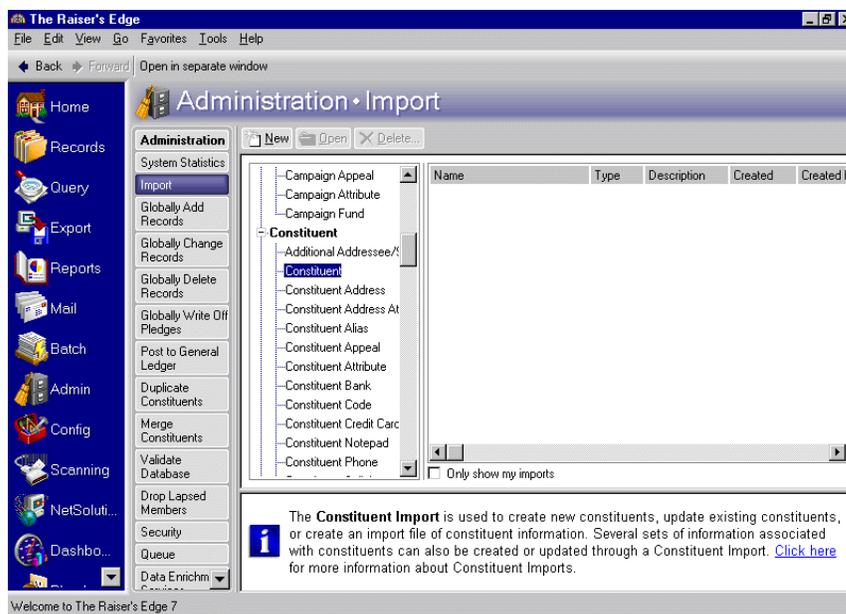
For information on updating records, see “Updating Existing Records” on page 21.

### ► Importing new constituent records

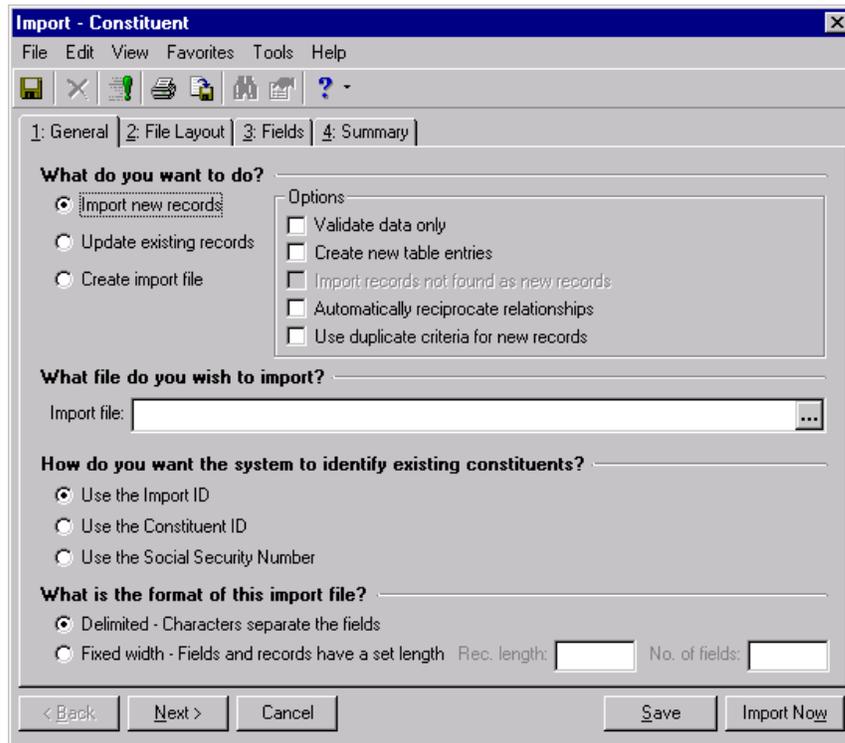
On the General tab, you identify what you want the program to do, the import file you want to use, how you want records identified, and how your import file is formatted.

**Note:** For more information about accessing the Import screen, see “Accessing Import” on page 4.

1. From the Import page, scroll down the tree view on the left to the **Constituent** category. Select Constituent.



- Click **New Import** on the action bar. The Import - Constituent screen appears, displaying the General tab.



- In the **What do you want to do?** frame, select **Import new records**. The program defaults to this option.
- You can mark any of the checkboxes displayed in the **Options** frame:

- **Validate data only** - You can validate the data contained in your import file without actually importing the data into *The Raiser's Edge*. The **Validate data only** option searches your import files for errors you may encounter during an import. You can also choose to create a report detailing all exceptions and errors the program found during the validation process. You can then clear up any potential problems before you start importing data into your database. Remember, once you start the import/update process, the only way to restore your database is by restoring it to a backup. Also, if you select this option, the **Import Now** button at the bottom right of the screen changes to **Validate Now**.

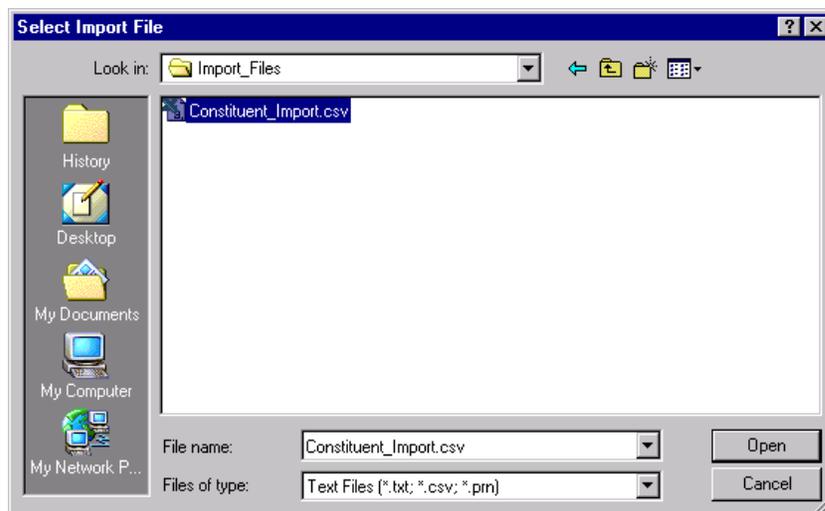
**Note:** For more information about table entries, see the Configuration chapter in the *Configuration & Security Guide*.

- **Create new table entries** - This checkbox creates new table entries for tables entries found in the import file that do not already exist in *The Raiser's Edge*. You create table entries from the **Tables** link in Configuration.
- **Automatically reciprocate relationships** - This checkbox appears for constituent, individual relationship, and organization relationship imports only. If marked, the program automatically adds the relationship and the reciprocal relationship on the relationship's record if the relationship is a constituent. However, the program fills in the **Relationship** and **Reciprocal** fields only if the **Relationship** field is populated on the constituent record.

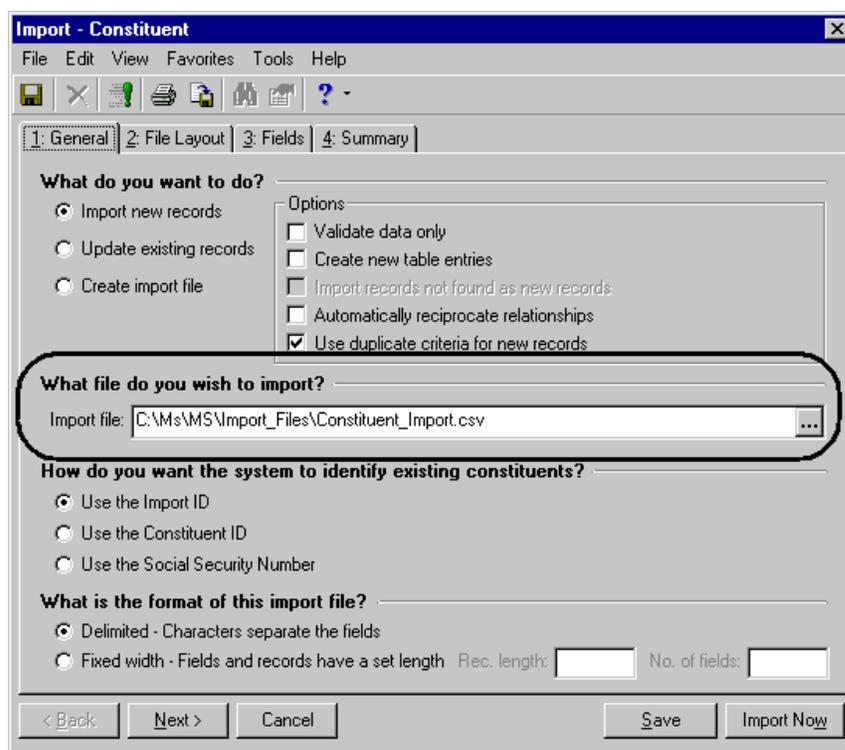
**Note:** For more information about establishing duplicate criteria, see the Business Rules chapter in the *Program Basics Guide*.

- **Use duplicate criteria for new records** - If you mark this checkbox, the program uses the duplicate criteria established from **Business Rules** in *Configuration* when checking for duplicate records during the import process.

5. In the **What file do you wish to import?** frame, enter the **Import file** name. This is the name of the file you want to import. To access a list of existing files, click the ellipsis. The Select Import File screen appears.



From here you can map to the import file, select the file, and click **Open** to return to the Import screen.



6. In the **How do you want the system to identify existing constituents?** frame, you must select a unique constituent ID for the program to use when identifying existing constituents. You can select one of the following.

**Note:** Because the Import ID is a non-editable field, we recommend this option to be the most reliable for identifying your existing records.

- **Use the Import ID** - The program defaults to this option. This is a number the program assigns your records. If you select this option, the program uses the import ID to identify existing records.
- **Use the Constituent ID** - If you select this option, the program uses the constituent ID number to identify existing records. The program generates this number based on your selection in **Business Rules** in *Configuration*.

**Note:** If you use constituent Social Security Numbers as an identifier when importing records, you must include the dashes when entering the number in your import file.

- **Use the Social Security Number** - If you select this option, the program uses the constituent Social Security Number to identify existing records. You enter this number on the Bio tab of the constituent record.

7. In the **What is the format of this import file?** frame, you can select one of the following format options.

**Note:** Unless you are familiar with every field in your import file, we recommend using the delimited format. If you select the fixed length option and you do not know the length of every field in your import, you run the risk of truncating import fields.

- **Delimited - Characters separate the fields.** You must select a character, such as a comma, to separate the fields included in your import file. For example, if you select comma delimited, fields are separated as follows: "Phone", "Address", "Name", etc. Carriage returns and line feed breaks separate records.
- **Fixed width - Fields and records have a set length.** This option allows you to define the length of the records you intend to import. Enter the number in the **Rec. length** field. For example, if you set the Name field length at 20, all names with 20 characters or less import into the program complete. Any name over 20 characters is truncated at the 21st character. Also, the next field to import starts immediately after the 20th character, so if you have a 20-character field, there is no space between it and the next field. In the **No. of fields** field, you can enter the number of different fields in a record. The import can then map the fields to *The Raiser's Edge*.

8. Select the File Layout tab.

**Import - Constituent**

File Edit Favorites Tools Help

1: General 2: File Layout 3: Fields 4: Summary

Field Separators and Text Qualifiers

Comma      Text qualifier: Quotation

Tab      Please indicate the text qualifiers. The information found between two text qualifiers will be imported as is. Any field separators found between two text qualifiers will not be treated as a field separator.

Semicolon

Space

Other      This allows you to distinguish between a field separator character and a character that is part of the data to be imported.

Import Field Names

Field names are on the first line of the import file

Import file does not contain field names

Field names are in a separate file

Sample Import Format

CnBio_Name	CnBio_Import_ID	CnAdrPrf_Addrline1	CnAdrPrf_Addrline2	CnAdrPrf_City
Mr. Joseph Patrick...	00001-079-0000185	248 Twin Lane	Building #3299	Birmingham
Mrs. Elizabeth Ann...	00001-079-0000186	2457 Morrison Drive		Savannah
Mr. Mark David A...	00001-079-0000187	125 Franklin Way		Chickasha

< Back    Next >    Cancel    Save    Import Now

9. Complete the **Field Separators and Text Qualifiers** frame.

- In the **Field Separators** side of the frame, you have to tell the program how you want the import fields separated. Although the program defaults to the **Comma** option, you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**. The **Other** option allows you to define the field separator, using a separator other than the ones listed.
- In the **Text qualifier** field, select the character you want to use to define the beginning and end points of your field.

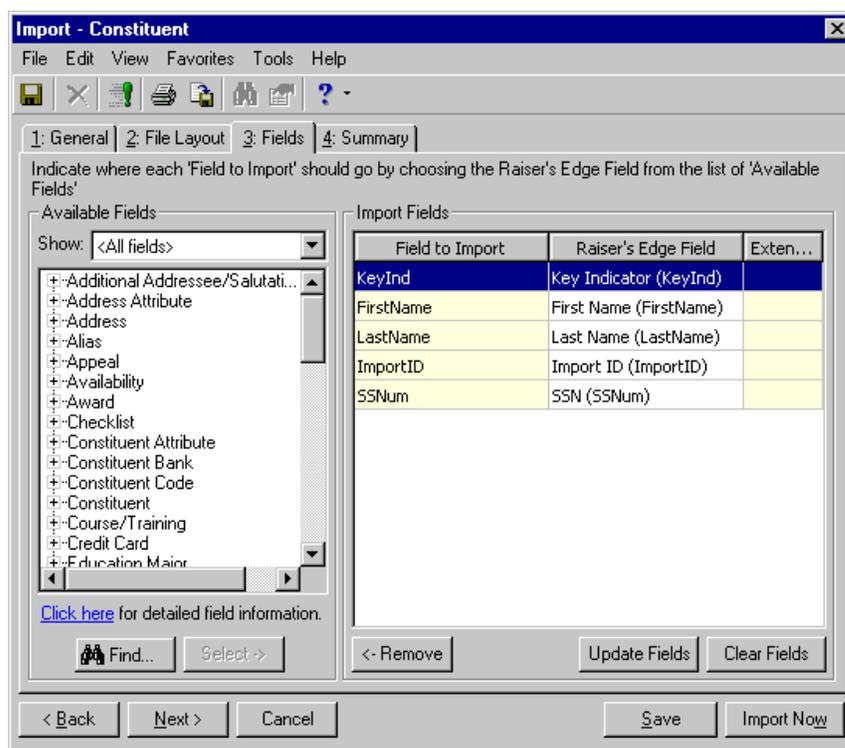
The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — “100 Main Street, Apt. 23F” — the program knows all text contained between the text qualifier is part of the same field.

10. Complete the **Import Field Names** frame. Select one of the following options:

- **Field names are on the first line of the import file** - If you select this option, the first line in the import file is the header line or row, which contains the Import Name of the fields included in the file. The remaining lines contain data records, one line per record. So, in a Constituent import, each constituent record is given its own line; in a Gift import each gift is given its own line; in a Constituent Phone import each phone number is given its own line, etc.
- **Import file does not contain field names** - This option does not require you to create a header. The program assumes the first line of the import contain data records.
- **Field names are in a separate file** - This option imports record information from fields defined in a file other than the import file. The header and import records are formatted using the field code names, separators, and text qualifiers explained in the previous sections, but the header record and the import file are contained in separate files.

The **Sample Import Format** frame displays data from your import file. You cannot edit you import file from this frame. It is display only.

11. Click **Next** to move to the Fields tab.



In the **Fields to Import** column, all fields included in the import file you selected on the General tab appear. The program attempts to map all fields in the **Field to Import** column to the corresponding **Raiser's Edge** fields in the **Raiser's Edge Field** column on the right. This is not a case-sensitive process.

If the program fails to map a field (the **Raiser's Edge Field** column row is blank), you must map the field manually.

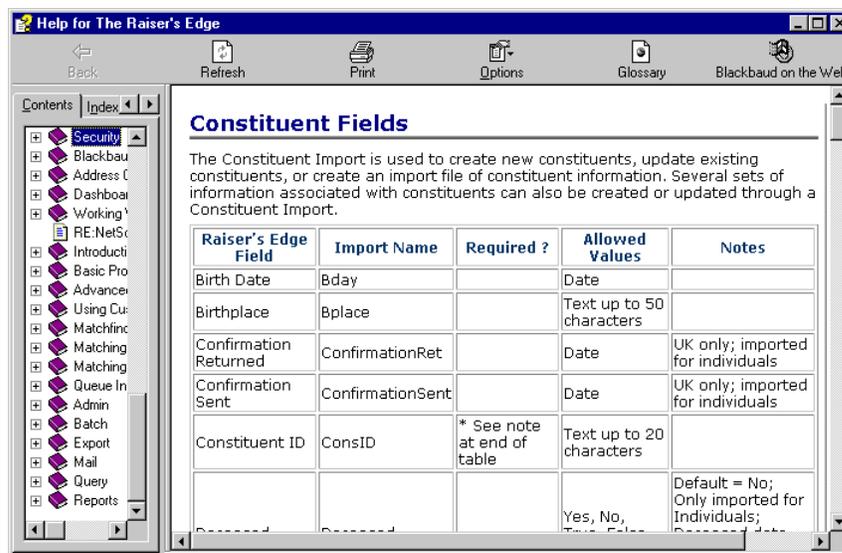
- Select the **Fields to Import** field you want to map.
- In the **Available Fields** frame on the left side of the screen, in the **Show** field, select the field type you are looking for (Address, Appeal, Award) or select "All fields" to display all available **Raiser's Edge** fields in the tree view.
- Highlight the field you want to move and click **Select**. The highlighted field moves into the **Raiser's Edge Field** column, next to the highlighted **Field to Import** field.

To remove a field from the **Raiser's Edge Field** column, highlight it and click **Remove**. You cannot delete entries from the **Field to Import** column.

To delete all fields from the **Raiser's Edge Field** column, click **Clear Fields**.

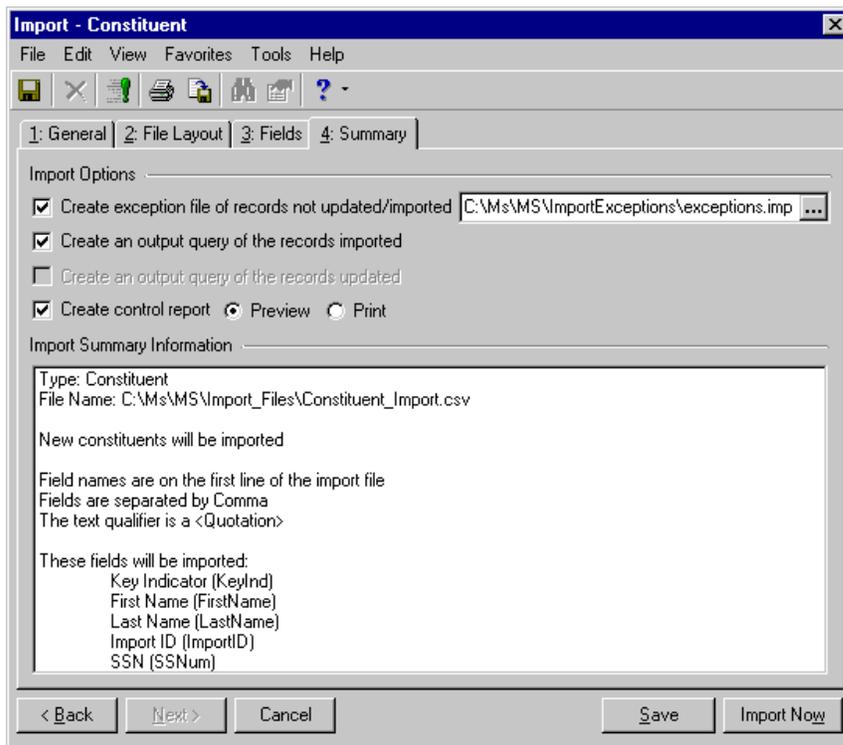
To restore any auto mapping, click **Update Fields**.

12. If you need information about what fields are required for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



To close this screen and return to the Fields tab, click the "X" in the upper, right corner.

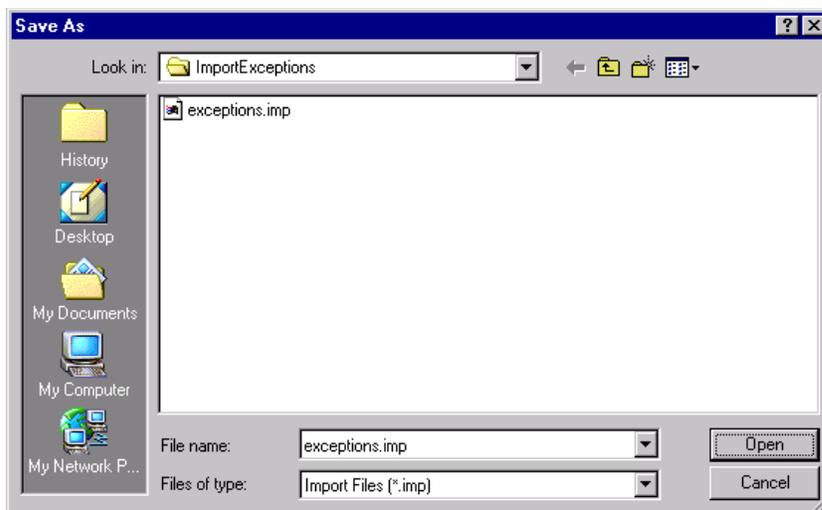
13. When you finish entering information on the Fields tab, select the Summary tab.



14. Complete the **Import Options** frame.

- **Create exception file of records not updated/imported** - Mark this checkbox to generate an exception file at the end of your import. The file contains all fields the program did not successfully update or import. Enter a name for your exception file and the path where you want it created.

Click the ellipsis to access the Save As screen.



Enter a **File name** for your exception file. This is where your exception file will be stored. In the **Files of type** field, enter a format type. Click **Open** to return to the Import screen.

- **Create an output query of the records imported** - Mark this checkbox if you want to create a query of all records imported. The query type depends on the type of import file selected. For example, if you run a constituent import, a constituent output query is created.

- **Create control report** - Mark this checkbox to print a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

15. After confirming the import information, click **Import Now**. If you marked the **Create an output query of the records imported** checkbox on the Summary tab, the Save Query screen appears.

16. Enter a **Query name** and **Description**. You can also allow others to use and modify your query.
17. Click **Save**. The program processes the import. When the process is complete, the Import Complete! screen appears, displaying the number of records processed and included in the import file and the number of exceptions.
18. Click **Close**. If you marked the **Create control report** checkbox and selected the **Preview** option on the Summary tab, the Control Report appears.

Import field name	Raiser's Edge field
KeyInd	Key Indicator
FirstName	First Name
LastName	Last Name
ImportID	Import ID
SSN	SSN

Record No.	Field	FieldValue	Reason
1	Import ID	00001070.0000185	Import ID - Constituent ID or Social Security Number is

19. You can **Print** or **Export** the control report from this screen. To close the report to return to the Import parameter screen, click the "X" in the upper, right corner.
20. On the Import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.

21. Enter a **Name** and **Description** for your import. You can also allow other users to run and modify the import parameter file.
22. Click **Save**. You return to the import parameter screen.
23. To exit the import parameter screen and return to the Import page, select **File, Close**.

## Updating Existing Records

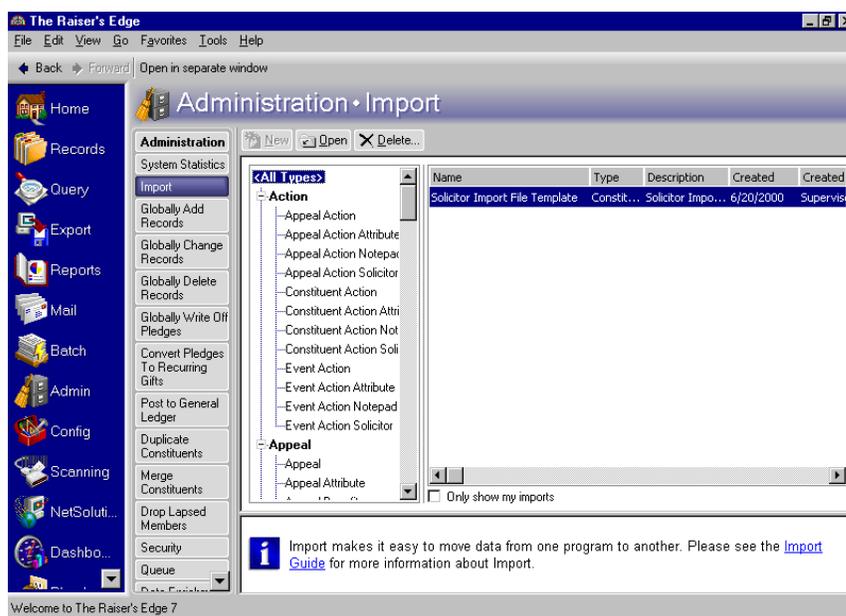
You can import information into your database for two reasons: to add new records to your database or to update records already entered in your database. This section details the steps you must follow to update existing records.

The **Update existing records** option available on the General tab of the import parameter screen is particularly useful if you send your data out for updates. You can use the **Update existing records** option to import the updated information back into *The Raiser's Edge*.

### ▶ Completing the Import parameter tabs to update records

On the import parameter tabs, you identify what you want the program to do, the import file you want to use, how you want records identified, and how your import file is formatted.

1. From the Import page, scroll down the tree view on the left until you find the import category and type that best match the information you want to import.



**Note:** For more information about how to create an import file, see “Creating an Import File” on page 28.

2. For example, if you are importing updated constituent address information, you can select Constituent Address. If you want to import Constituent Address information along with other constituent information such as birth dates or marital status, you can select Constituent. For this example, select Constituent Address.
3. All import files saved for the selected import type appear in the grid on the right side of your screen. To open an existing import file, select the import file and click **Open** on the action bar. To create a new import file, click **New Import** on the action bar.

The Import - Constituent Address screen appears, displaying the General tab.

- In the **What do you want to do?** frame, select **Update existing records**.

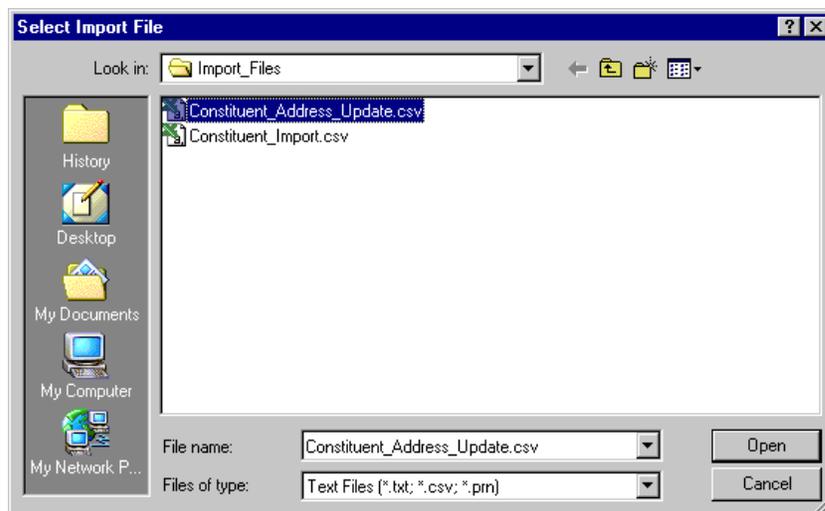
**Warning:** You must create the import file before you enter **Import**. The file must be formatted in accordance with the parameter settings you select in **Import**. Import files must be formatted as \*.txt, \*.csv, or \*.prn files.

- You can mark any of the checkboxes displayed in the **Options** frame.
  - Validate data only** - You can validate the data contained in your import file without actually importing the data into *The Raiser's Edge*. The **Validate data only** option searches your import files for errors you may encounter during an import. You can also choose to create a report detailing all exceptions and errors the program found during the validation process. You can then clear up any potential problems before you start importing data into your database. Remember, once you start the import/update process, the only way to restore your database is by restoring it to a backup. Also, if you select this option, the **Import Now** button at the bottom right of the screen changes to **Validate Now**.

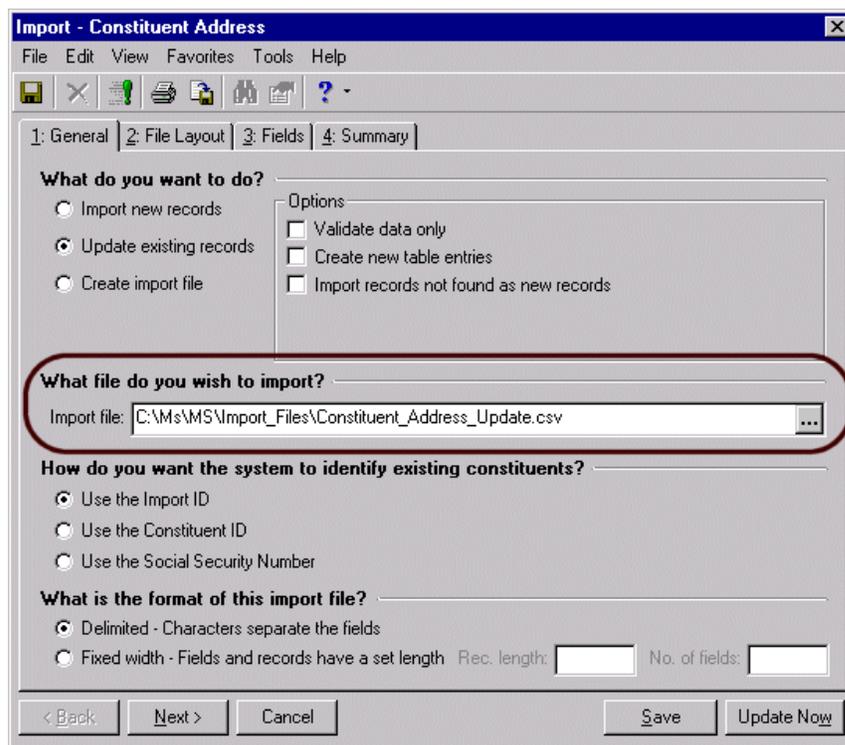
**Note:** For more information about table entries, see the Configuration chapter in the *Configuration & Security Guide*.

- Create new table entries** - This checkbox creates new table entries for tables entries found in the import file that do not already exist in *The Raiser's Edge*. You create table entries from the **Tables** link in Configuration.
- Import records not found as new records** - This checkbox identifies as "new" any update record not matched to an existing record in your database. The program then creates a new record for the data.

6. In the **What file do you wish to import?** frame, enter the **Import file** name. This is the name of the file that contains the updated information you want to import to your records. To access a list of existing import files, click the ellipsis. The Select Import File screen appears.



From here you can map to the import file with the updated records, and click **Open** to return to the Import screen.



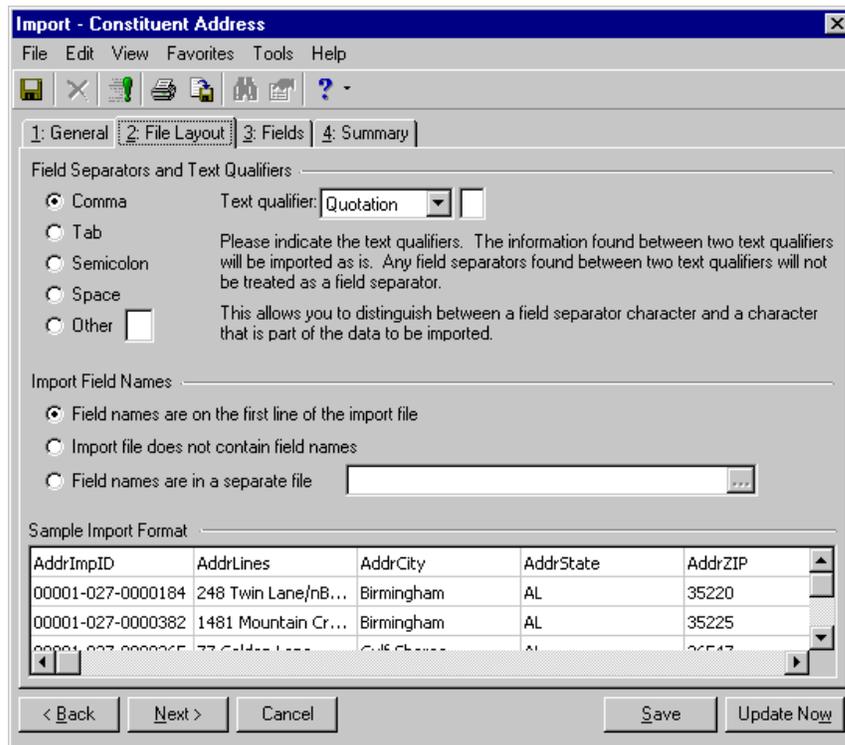
7. In the **How do you want the system to identify existing constituents?** frame, when updating records, you must select **Use the Import ID**. The program defaults to this option. This is a program-generated number assigned to your records. The program uses the import ID to identify existing records.

**Warning:** To *update* a record, you must have a unique ID to reference the record.

8. In the **What is the format of this import file?** frame, select one of the following options.

- **Delimited - Characters separate the fields.** You must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: “Phone”, “Address”, “Name”, etc. Carriage returns and line feed breaks separate records.
- **Fixed width - Fields and records have a set length.** This option allows you to define the length of the records (fields) you intend to import. Enter the number in the **Rec. length** field. For example, if you set the record length at 20, all records with 20 characters or less import into the program complete. Any record over 20 characters is truncated at the 21st character. Also, the next record to import starts immediately after the 20th character, so if you have a 20-character record, there is no space between it and the next record. In the **No. of fields** field, you can enter the number of different fields there are in a record. The import can then map the fields to *The Raiser’s Edge*.

9. Click **Next** to move to the File Layout tab.



10. Complete the **Field Separators and Text Qualifiers** frame.

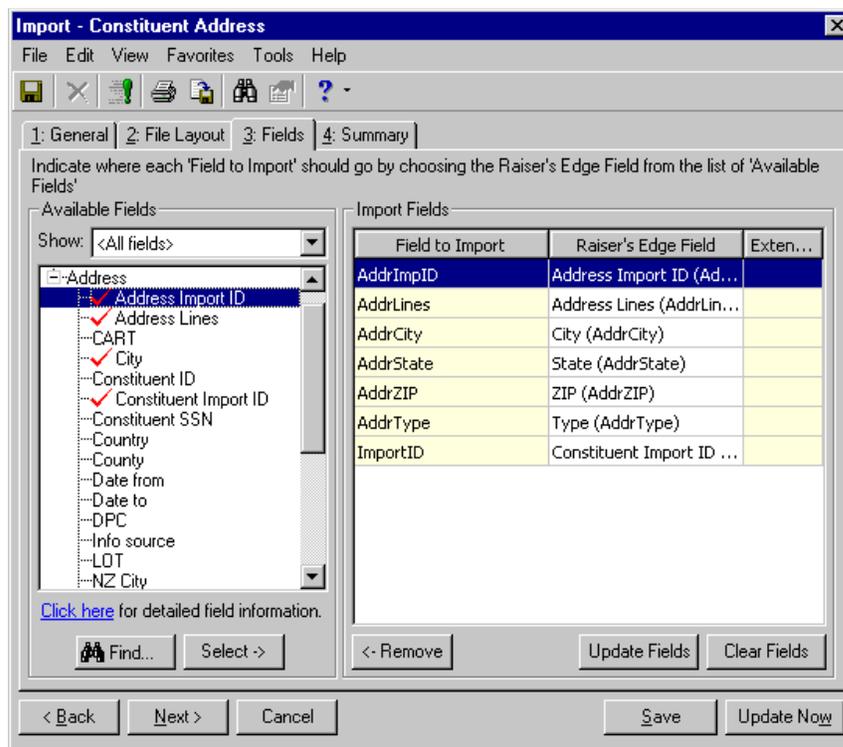
- In the **Field Separators** side of the frame, you have to tell the program how you want the import fields separated. Although the program defaults to the **Comma** option, you may select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**. The **Other** option allows you to define the field separator, using a separator other than the ones listed.
- In the **Text qualifier** field, select the character you want to use to define the beginning and end points of your field. For example, if you want to include the **Address block** field in your import file using quotation marks as your text qualifier and commas as your separator it would appear as follows: “AddrBlock”,

The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — “100 Main Street, Apt. 23F” — the program knows all text contained between the text qualifier is part of the same field.

11. Complete the **Import Field Names** frame. Select one of the following options:

- **Field names are on the first line of the import file** - If you select this option, the first line in the import file is the header line or row, which contains the Import Name of the fields included in the file. The remaining lines contain data records, one line per record. So, in a Constituent import, each constituent record is given its own line; in a Gift import each gift is given its own line; in a Constituent Phone import each phone number is given its own line.
- **Import file does not contain field names** - This option does not require you to create a header. The program assumes the first line of the import contain data records.
- **Field names are in a separate file** - This option imports record information from fields defined in a file other than the import file. The header and import records are formatted using the field code names, separators, and text qualifiers explained in steps 8 and 9, but the header record and the import file are contained in separate files.

12. Click **Next** to move to the Fields tab.



In the **Fields to Import** column, all fields included in the import file you selected on the General tab appear. The program attempts to map all fields in the **Field to Import** column to the corresponding **Raiser's Edge** fields in the **Raiser's Edge Field** column on the right. This is not a case-sensitive process.

If the program fails to map a field (the **Raiser's Edge Field** column row is blank), you must map the field manually.

- Select the **Fields to Import** field you want to map.
- In the **Available Fields** frame on the left side of the screen, in the **Show** field, select the field type you are looking for (Address, Appeal, Award) or select "All fields" to display all available **Raiser's Edge** fields in the tree view.
- Highlight the field you want to move and click **Select**. The highlighted field moves into the **Raiser's Edge Field** column, next to the highlighted **Field to Import** field.

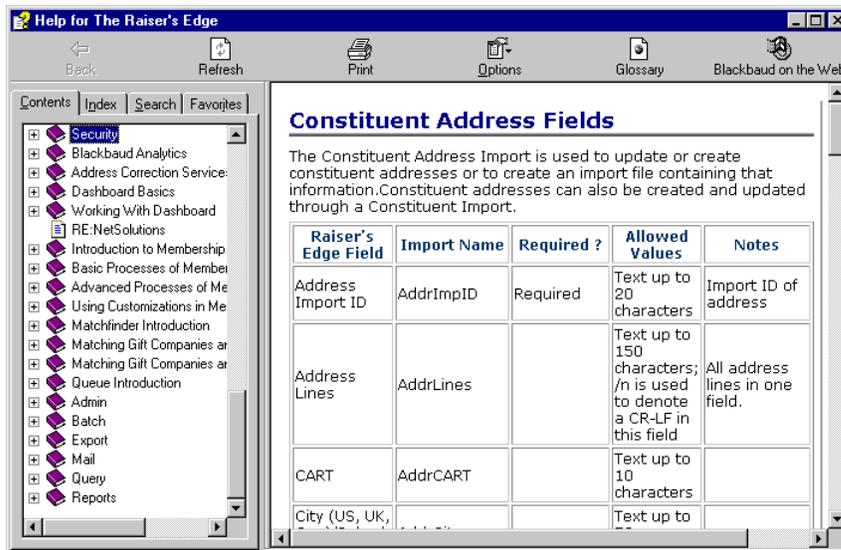
**Note:** The import values contained in your import file must be arranged in the same order you arrange the field names on the Fields tab.

To remove a field from the **Raiser's Edge Field** column, highlight it and click **Remove**. You cannot delete entries from the **Field to Import** column.

To delete all fields from the **Raiser's Edge Field** column, click **Clear Fields**.

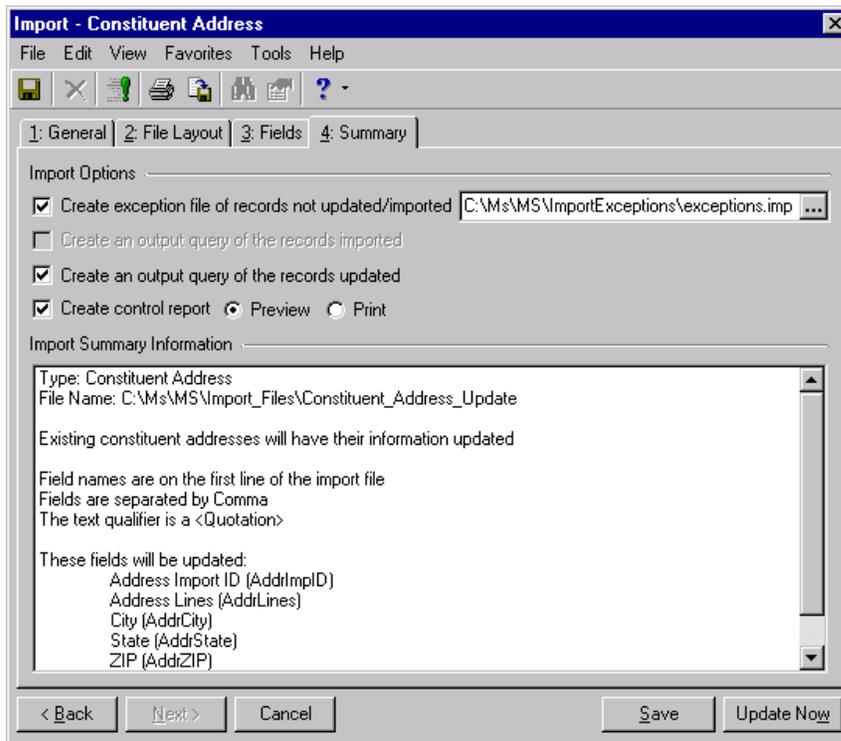
To restore any auto mapping, click **Update Fields**.

13. If you need information about what fields are required for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



To close this screen and return to the Fields tab, click the "X" in the upper, right corner.

14. When you finish entering informant on the Fields tab, select the Summary tab.



15. Complete the **Import Options** frame.

- **Create exception file of records not updated/imported** - Mark this checkbox to generate an exception file at the end of your import. The file contains all records the program did not successfully update or import. Enter a name for your exception file and the path where you want it created.

Click the ellipsis to access the Save As screen.

The screenshot shows a 'Save Import As' dialog box with the following details:

- Name:** Gift Import File
- Description:** Ran June 22
- Other users may run this import
- Other users may modify this import

Enter a **File name** for your exception file. This is where your exception file will be stored. In the **Files of type** field, enter a format type. Click **Open** to return to the Import screen.

- **Create an output query of the records imported** - Mark this checkbox if you want to create a query of all records imported. The query type depends on the type of import file selected. For example, if you run a constituent import, a constituent output query is created.
- **Create an output query of the records updated** - Mark this checkbox if you want to create a query of all records updated. The query type depends on the type of import file selected. For example, if you run a gift import, a gift output query is created.
- **Create control report** - Mark this checkbox to print a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

The **Import Summary Information** frame displays the import parameters and other information you selected for your import.

16. After confirming the update information, click **Update Now**. If you marked the **Create an output query of the records updated** checkbox on the Summary tab, the Save Query screen appears.

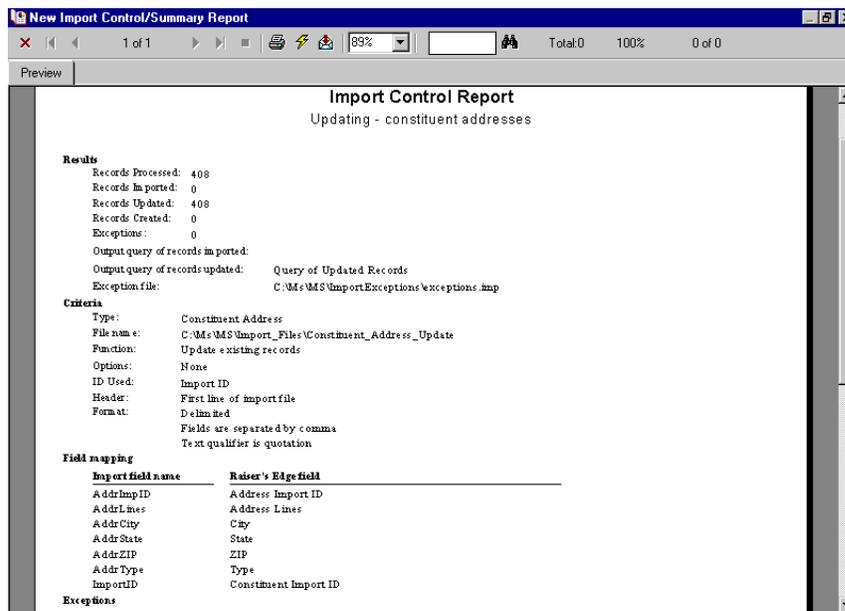
The screenshot shows a 'Save Static Query' dialog box with the following details:

- Query name:** Query of Updated Records
- Description:** Query of updated records created from Import
- Query format:** Static
- Query Type:** Constituent
- Other users may execute this query
- Other users may modify this query
- Created From:** Import

17. Enter a **Query name** and **Description**. You can also allow others to use and modify your query.

18. Click **Save**. The program processes the update. When the process is complete, the Import Complete! screen appears, displaying the number of records processed, added, and updated. It also shows the number of exceptions and how long the process took.

19. Click **Close**. If you marked the **Create Control Report** checkbox and selected the **Preview** option on the Summary tab, the control report appears.



20. You can **Print** or **Export** the control report from this screen. To close the control report and return to the import parameter screen, click the "X" in the upper, right corner.
21. To exit the import parameter screen, from the menu bar, select **File, Close**.

## Creating an Import File

**Warning:** If you use a mailing house, be aware address lines are imported and exported with the /n between address lines instead of in separate fields. If your mail house cannot accept this format or the mail house cannot return the file in this format, you must separate the addresses before you send the file.

The **Create import file** option included on the import parameter screen in **Import** creates an import file you can then use in other applications. You can also import any updated or new records back into **The Raiser's Edge** using the same file.

The option creates a file of selected database records. It works very much like **Export** in **The Raiser's Edge**. You select fields, import IDs, etc. The program then extracts all of the selected information, placing it in the import file, which you can save and reuse. You can create an import file one of four ways:

- **Create an import without field names - separated**
- **Create an import without field names - fixed width**
- **Create an import containing field names**
- **Create an import with a separate field names record**

This section explains each method in detail. Once you create and save an import file, you can use it over and over to import new records or update existing records.

**Note:** *The Raiser's Edge* sample database includes several sample import files. These files may prove useful as guides when you create import files. You can access the sample files in **Import** by clicking the ellipsis in the **What file do you wish to import?** frame. The Select Import File screen appears, and you can map to the sample import files, which are stored in RE7/Help folders. In the **Files of type** field, select "All Files".

## Creating an Import Without Field Names - Separated

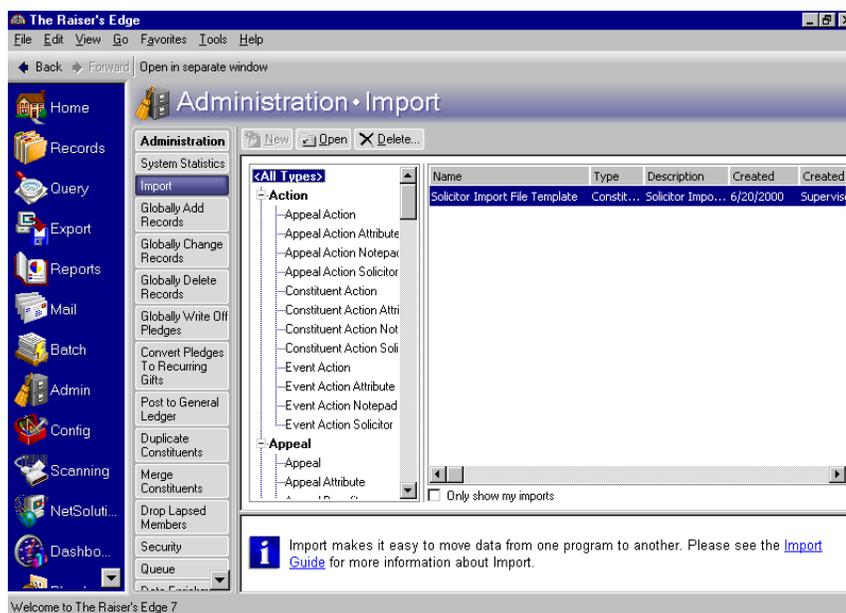
Of the four methods you can use to create an import file, the **Creating an import file without field names - separated** is the easiest. This method does not require you to create a header or define field or record lengths. You do, however, have to format the import file to match the parameters you establish in *The Raiser's Edge*.

### ▶ Completing the General tab when creating an import without field names — Separated.

On this tab, you identify what you want the program to do, the import file you want to create, how you want records identified, and how your import file is formatted.

**Warning:** Make sure every row in the last column of your import file is populated with data. The system then knows when to move on to the next record. To do this, open your file in *Excel* and move one of the required field columns to the last column in the file.

1. From the **Import** page, in the tree view on the left, select the type of import record you want to create.



**Note:** *The Raiser's Edge* sample database includes several sample import files. These files may prove useful as guides when you create import files. You can access the sample files in **Import** by clicking the ellipsis in the **What file do you wish to import?** frame. The Select Import File screen appears, and you can map to the sample import files, which are stored in RE7/Help folders. In the **Files of type** field, select "All Files".

- Click **New Import** on the action bar. The Import screen appears, displaying the General tab.

**Import - Gift**

File Edit View Favorites Tools Help

1: General | 2: File Layout | 3: Fields | 4: Summary

**What do you want to do?**

Import new records

Update existing records

Create import file

**Options**

Validate data only

Create new table entries

Import records not found as new records

Automatically add installments for new pledges

**What file do you wish to import?**

Import file:

**How do you want the system to identify existing constituents?**

Use the Import ID

Use the Constituent ID

Use the Social Security Number

**What is the format of this import file?**

Delimited - Characters separate the fields

Fixed width - Fields and records have a set length Rec. length:  No. of fields:

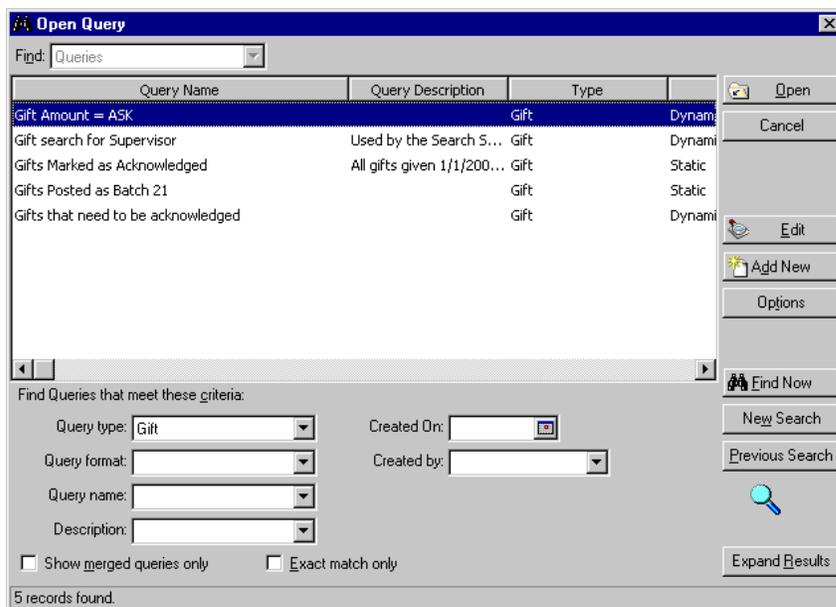
< Back Next > Cancel Save Import Now

- In the **What do you want to do?** frame, select **Create import file**.

**Note:** The **Import new records**, **Update existing records**, and **Validate data only** options also offered in the **What do you want to do?** frame are each covered in their own sections in this chapter.

- Complete the checkboxes and buttons enabled in the **Options** frame.
  - Include** - Click this button and select the records you want to include in your import file.
  - All records** includes all records in your database.

**Selected records** includes only records you saved in a query. If you choose this option, the Open Query screen appears.



You can use the Open Query screen to search for an existing query or to create a new query. To search for a query, you can enter the criteria you want to use to filter the results and click **Find Now**. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**.

To create query, click **Add Now**. The New Query screen appears.

**Note:** For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

**Records changed as of** adds a date field. Enter the date and all records changed as of the date you enter are included in the import file.

- **Include selected fields in the import file** - The program defaults to this option. If selected, on the Fields tab you must select and order the fields you want to include in your import file.

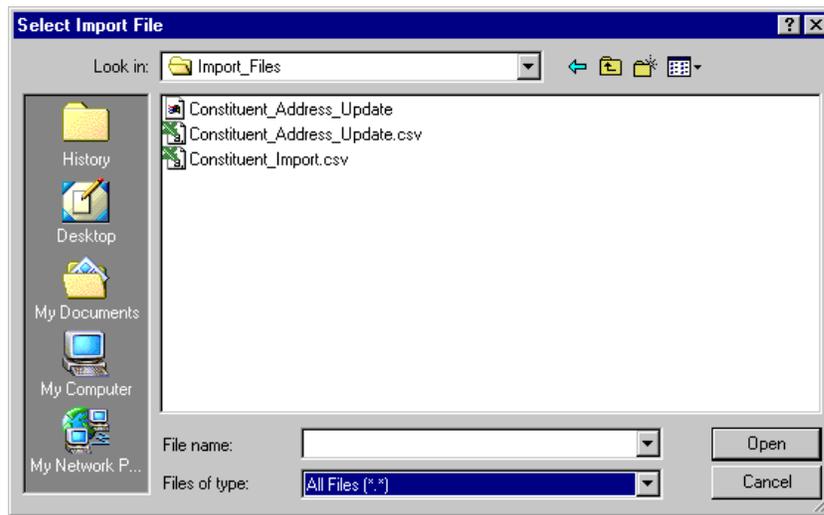
If you select this option, when you create your import file, the program does not require the usual required fields. For example, you can create an import file without a key indicator or import ID. However, you cannot import this file back into your database.

**Note:** **Rec length** and **No. fields** are always disabled when you select the **Create import file** option. The program automatically completes these fields based on the fields you select to import.

- **Include all fields in the import file** - This option includes in your import all fields related to the selected import type. If you select this option, all the fields are automatically loaded on the Fields tab by field names in the fixed-width format. The **Rec. length** and **No. of fields** fields in the **What is the format of this import file?** frame are disabled. The program automatically sets this information. Also, if you select this option, the program deletes whatever you entered on the Fields tab, replacing your entries with all fields.

5. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating.

If you want to map to a specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.



Locate the directories, enter a **File name**, and select a file type in the **Files of type** field. Click **Open** to return to the Import screen.

6. On the Import screen, complete the **What ID field do you want to use?** frame. All the IDs must be unique. You can select one of the following:

**Note:** Because the Import ID is a non-editable field, we recommend this option to be the most reliable for identifying your existing records.

- **Use the Import ID** - The program defaults to this option. This is a program-generated number the program assigns your records. If you select this option, the program uses the import ID to identify existing records.
- **Use the Constituent ID** - If you select this option, the program uses the constituent ID number to identify existing records. The program generates this number based on your selection in **Business Rules** in *Configuration*.
- **Use the Social Security Number** - If you select this option, the program uses the constituent Social Security Number to identify existing records. You enter this number on the constituent records.

**Note:** If you use constituent Social Security Numbers as an identifier when importing records, you must include the dashes when entering the number in your import file.

7. In the **What is the format of this import file?** frame, select **Delimited - Characters separate the fields**. If you select this option, carriage returns and line feed breaks do not separate the fields in your import. You must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: “Phone”, “Address”, “Name”, etc.

The screenshot shows the 'Import - Gift' dialog box with the following settings:

- What do you want to do?**
  - Import new records
  - Update existing records
  - Create import file
- Options**
  - Include... **All records**
  - Include selected fields in the import file
  - Include all fields in the import file
- What file do you wish to create?**
  - Import file: C:\Ms\MS\Import\_Files\Gift\_Import.txt
- What ID Field do you want to use?**
  - Use the Import ID
  - Use the Constituent ID
  - Use the Social Security Number
- What is the format of this import file?**
  - Delimited - Characters separate the fields
  - Fixed width - Fields and records have a set length

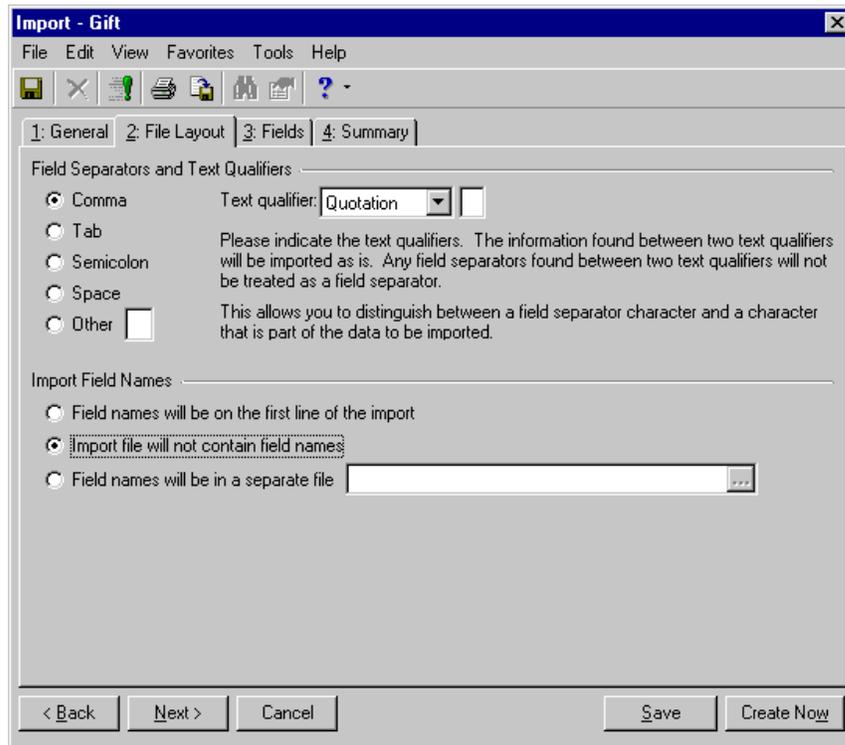
8. When you finish the General tab, you are ready to move to the File Layout tab.

► **Completing the File Layout Tab when creating an import without field names — separated**

On this tab define how you want the program to create the import file. The options offered here are based on your selection in the **What is the format of this import file?** frame on the General tab. This section explains the delimited format option.

**Note:** You must format the import file using the separator and text qualifier you select on the File Layout tab.

1. Select the File Layout tab.



2. Complete the **Field Separators and Text Qualifiers** frame. Although the program defaults to the **Comma** option, you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**. The **Other** option allows you to define the field separator, using a separator other than the ones listed. Complete the **Text qualifier** field. This defines the beginning and end points of your field.

The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — “100 Main Street, Apt. 23F” — the program knows all text contained between the text qualifier is part of the same field.

**Note:** The **Field names will be on the first line of the import file** and the **Field names are in a separate file** options are explained later in this chapter.

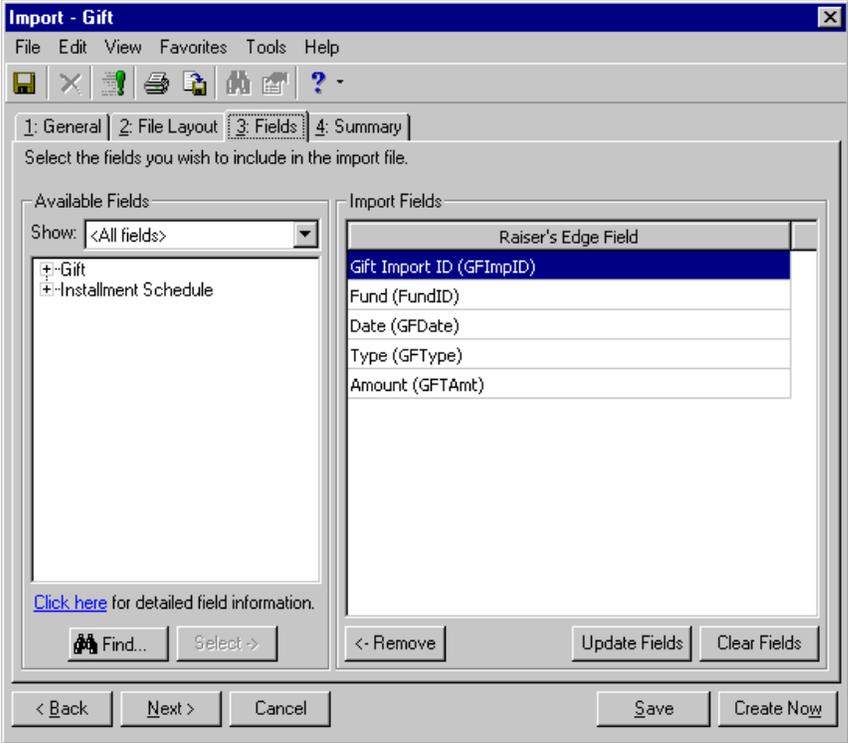
3. In the **Import Field Names** frame, select the **Import file will not contain field names** option. This option does not require you to create a header. The program assumes the first line of the import contains data records.
4. When you finish the File Layout tab, you are ready to move to the Fields tab.

► **Completing the Fields tab when creating an import without field names — Separated**

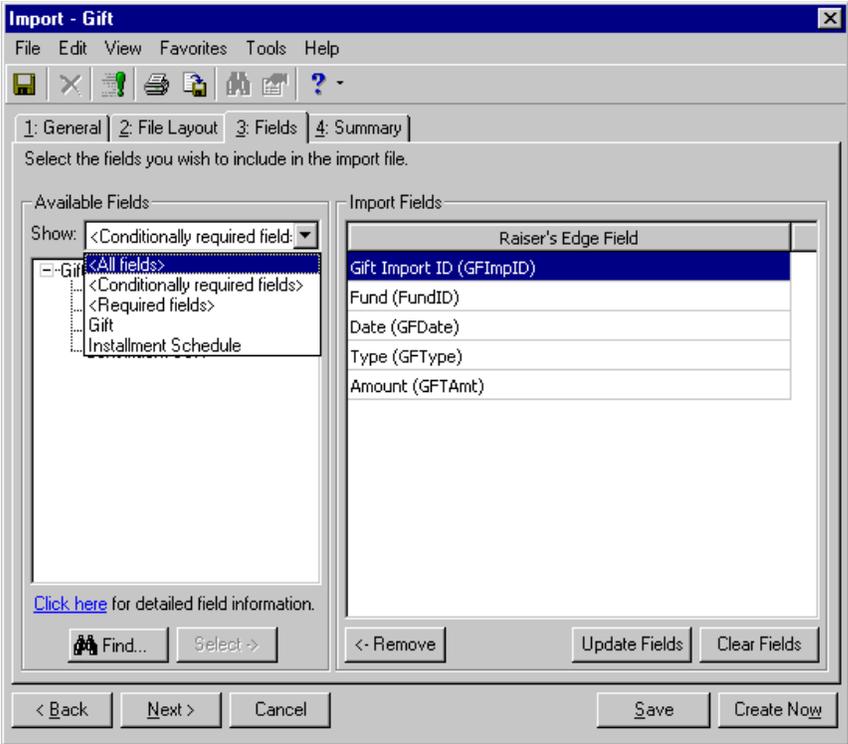
On this tab, you select the fields you want included in the import file.

**Warning:** When creating an import file, the program automatically includes fields required for the import type you are creating. These default fields allow you to create the import file and import the file back into *The Raiser's Edge*. We strongly recommend you do not remove any of the default fields.

1. Select the Fields tab. If on the General tab, you selected **Include selected fields in the import file**, the Raiser's Edge Field box appears with only the fields required for the import type you are creating. If on the General tab, you selected **Include all fields in the import file**, skip to step 5.

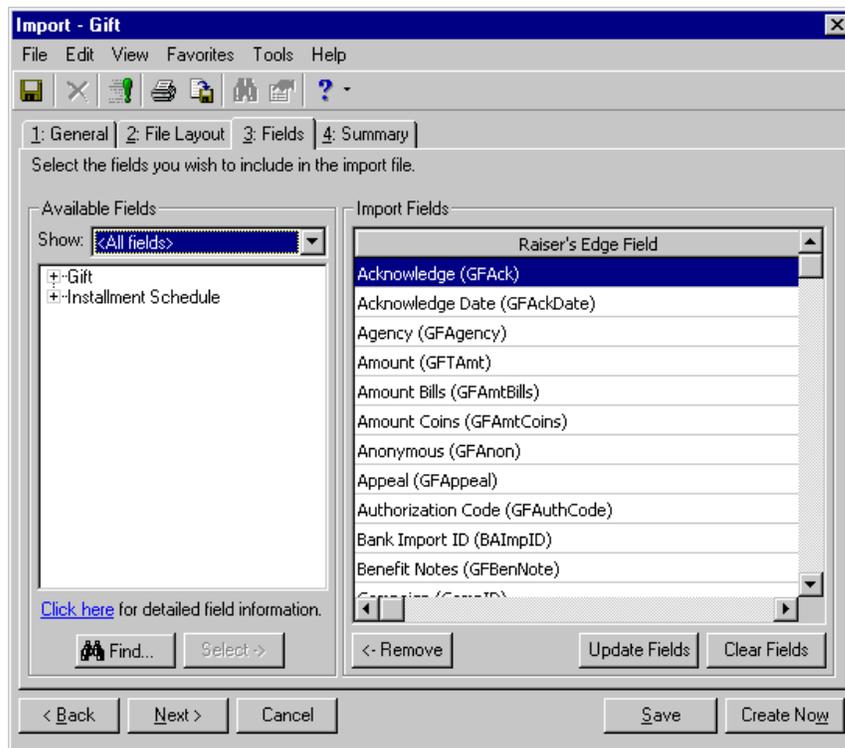


2. In the **Available Fields** frame, you must select the additional fields you want to include. Use the **Show** field to filter the options appearing in the tree view.



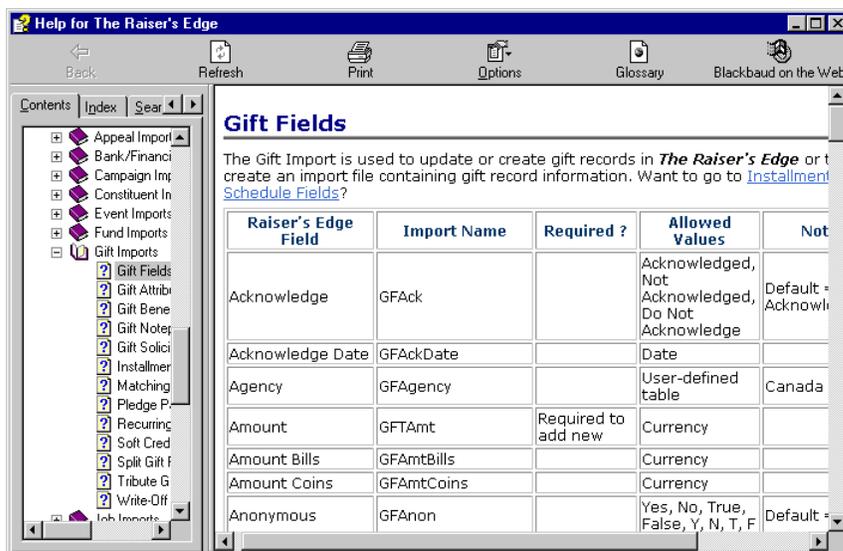
For example, if you want to see only fields for a gift import, select “Gift”; If you want to see only the required fields, you can select “Required fields” or “Conditionally required” fields. You can select “All fields” to display every field category.

3. In the tree view on the left, click the plus sign next to the category heading to view all fields available for that category.
4. Highlight the field you want to include in your import file, and click **Select** to move the field into the **Raiser’s Edge Field** box. Repeat this step until you have all the import fields you want to include in your import file in the **Raiser’s Edge Field** box.
5. If on the General tab, you selected **Include all fields in the import file**, all fields default into the **Raiser’s Edge Field** box on the right.



6. You can edit the field selections on this screen.
  - To remove a field, highlight it and click **Remove**.
  - To make sure the list of fields is up-to-date, click **Update Fields**.
  - To remove all fields from the **Raiser’s Edge Field** box, click **Clear Fields**.
  - If you want to see the required fields, in the **Show** field in the **Available Fields** frame, select “Required fields” or “Conditionally required” fields.

- If you need more information about fields available for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



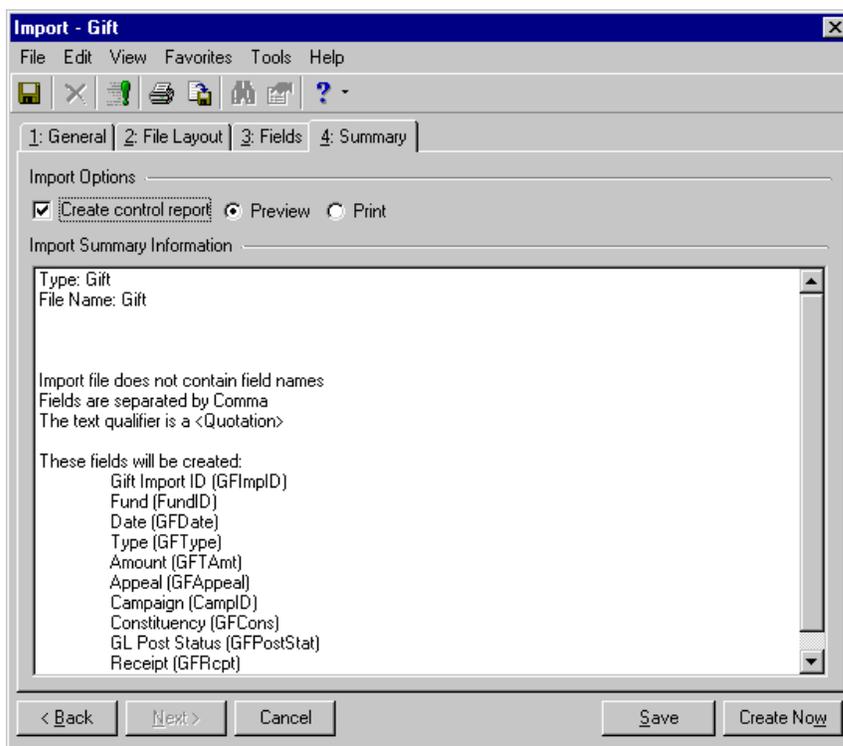
To close this screen and return to the Fields tab, click the “X” in the upper, right corner.

- When you finish the Fields tab, you are ready to move to the Summary tab.

▶ **Completing the Summary tab when creating an import without field names — separated**

This tab gives you an overview of the choice you made while creating your import file. You can review the information and make any necessary changes before you actually create the file.

- Select the Summary tab.



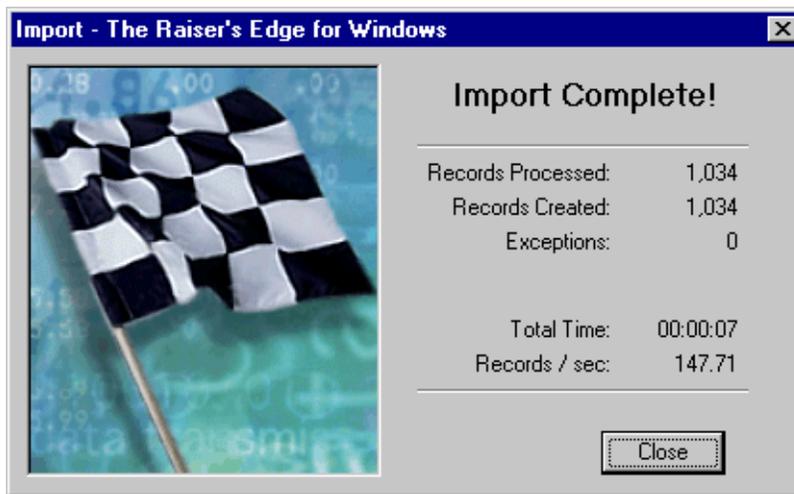
2. Complete the **Import Options** frame.

**Create control report** - Mark this checkbox to generate a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

3. The **Import Summary Information** frame displays the import parameters and other information you selected for your import.
4. When you complete the Summary tab, you are ready to run the import.

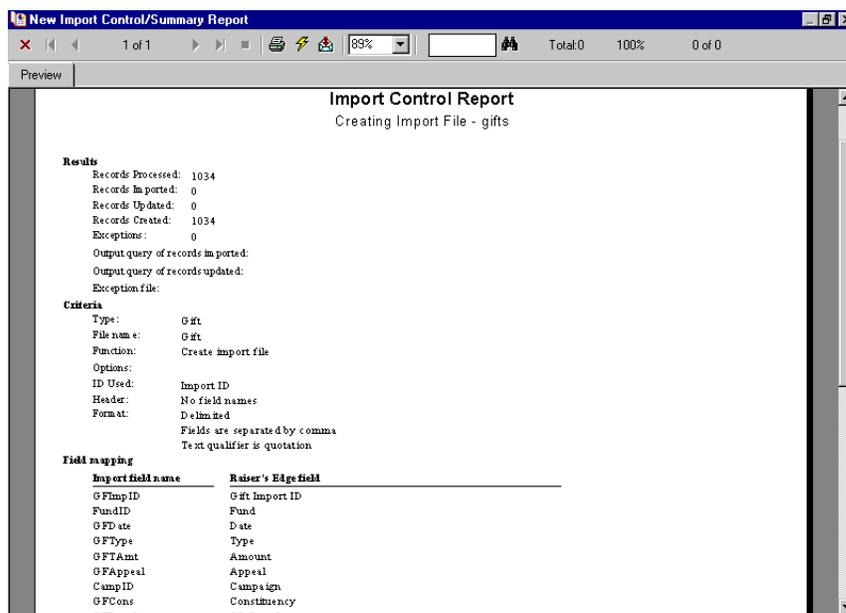
▶ **Running an import without field names — Separated**

1. After you complete the parameter tabs, defining your import file, click **Create Now**. A screen appears tracking the process. The processing time varies, based on the size of your database and the number of fields you included in your import file.
2. When the process is complete, the Import Complete! screen appears, displaying the number of records processed and included in the import file and the number of exceptions.

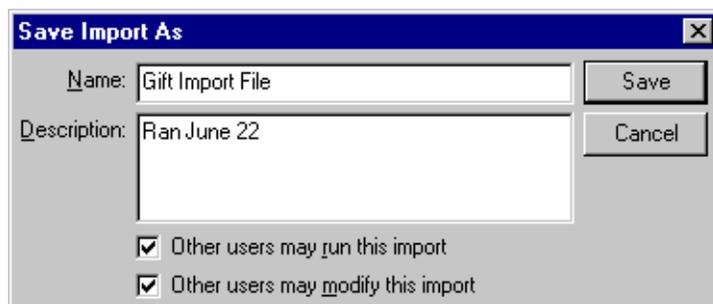


**Note:** If you did not mark the **Create control report** checkbox on the Summary tab, a **Preview Report** button appears on the Import Complete! screen. Click this button if you want to view the control report.

- Click **Close**. If you marked the **Create control report** checkbox on the Summary tab, the Control Report appears.



- You can **Print** or **Export** this report. To close the report and return to the import parameter screen, click the "X" in the upper, right corner.
- On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.



- Enter a **Name** and **Description** for your import. You can also allow other users to run or modify the import parameter file.
- Click **Save** to return to the import parameter screen.
- To exit the import parameter screen, from the menu bar, select **File, Close**. You return to the Import screen.

## Creating an Import Without Field Names - Fixed Width

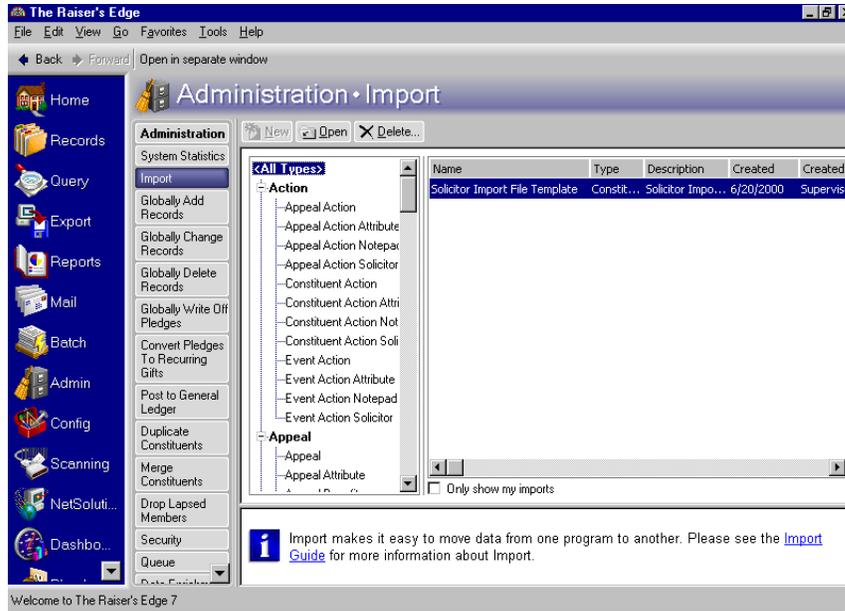
This import type reads import data based on the length of the selected fields. When *creating* an import file, the **Rec. length** and **No. of fields** fields on the General tab are disabled. The program automatically completes these two fields based on the fields you select to include in your import. The program allows for the largest field included in the import. Also, because field separators and text qualifiers are not need when the import file layout is based on the size of the records and fields, the File Layout tab is not necessary and does not appear when you select the fixed-width option.

► **Completing the General tab when creating an import without field names — fixed width**

**Warning:** Make sure every row in the last column of your import file is populated with data. The system then knows when to move to the next record. To do this, open your file in *Excel* and move one of the required field columns to the last column in the file.

On this tab you identify what you want the program to do, the import file you want to create, how you want records identified, and how your import file is formatted.

1. From the **Import** page, in the tree view on the left, select the type of import record you want to create.



**Note:** *The Raiser's Edge* sample database includes several sample import files. These files may prove useful as guides when you create import files. You can access the sample files in **Import** by clicking the ellipsis in the **What file do you wish to import?** frame. The Select Import File screen appears, and you can map to the sample import files, which are stored in RE7/Help folders. In the **Files of type** field, select "All Files".

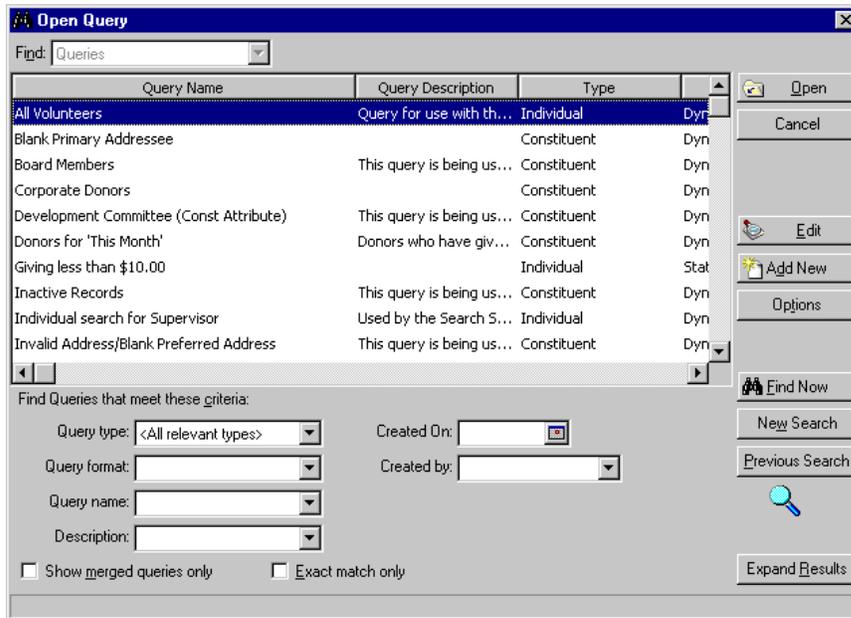
2. On the action bar, click **New Import**. The Import screen appears, displaying the General tab.

3. In the **What do you want to do?** frame, select **Create import file**.

**Note:** The **Import new records** and **Update existing records** options also offered in the **What do you want to do?** frame are each covered in their own sections in this chapter.

4. Complete the checkboxes and buttons enabled in the **Options** frame.
  - **Include** - Click this button and select the records you want to include in your import file.
  - **All records** includes all records in your database.

**Selected records** includes only records you saved in a query. If you choose this option, the Open Query screen appears.



You can use the Open Query screen to search for an existing query or to create a new query. To search for a query, you can enter the criteria you want to use to filter the results and click **Find Now**. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**.

To create query, click **Add Now**. The New Query screen appears.

**Note:** For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

**Records changed as of** adds a date field. Enter the date and all records changed as of the date you enter are included in the import file.

- **Include selected fields in the import file** - The program defaults to this option. If selected, on the Fields tab you must select and order the fields you want to include in your import file.

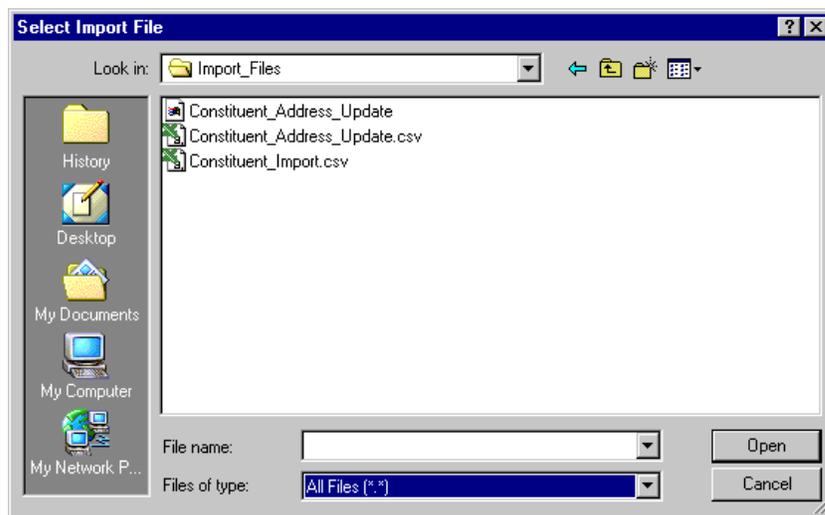
If you select this option, when you create your import file, the program does not require the usual required fields. For example, you can create an import file without a key indicator or import ID. However, you cannot import this file back into your database.

**Note:** **Rec length** and **No. fields** are always disabled when you select the **Create import file** option. The program automatically completes these fields based on the fields you select to import.

- **Include all fields in the import file** - This option includes in your import all fields related to the selected import type. If you select this option, all the fields are automatically loaded on the Fields tab by field names in the fixed-width format. The **Rec. length** and **No. of fields** fields in the **What is the format of this import file?** frame are disabled. The program automatically sets this information. Also, if you select this option, the program deletes whatever you entered on the Fields tab, replacing your entries with all fields.

5. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating.

If you want to map to a specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.



Locate the directories, enter a **File name**, and select a file type in the **Files of type** field. Click **Open** to return to the Import screen.

- On the Import screen, complete the **What ID field do you want to use?** frame. All the IDs must be unique. You can select one of the following:

**Note:** Because the Import ID is a non-editable field, we recommend this option to be the most reliable for identifying your existing records.

- **Use the Import ID** - The program defaults to this option. This is a program-generated number the program assigns your records. If you select this option, the program uses the import ID to identify existing records.
- **Use the Constituent ID** - If you select this option, the program uses the constituent ID number to identify existing records. The program generates this number based on your selection in **Business Rules** in *Configuration*.
- **Use the Social Security Number** - If you select this option, the program uses the constituent Social Security Number to identify existing records. You enter this number on the constituent records.

**Note:** If you use constituent Social Security Numbers as an identifier when importing records, you must include the dashes when entering the number in your import file.

7. In the **What is the format of this import file?** frame, select the **Fixed width - Fields and records have a set length** option. When *creating* an import file, the **Rec. length** and **No. of fields** fields are disabled. The program automatically updates these fields, based on the fields you select on the Fields tab.

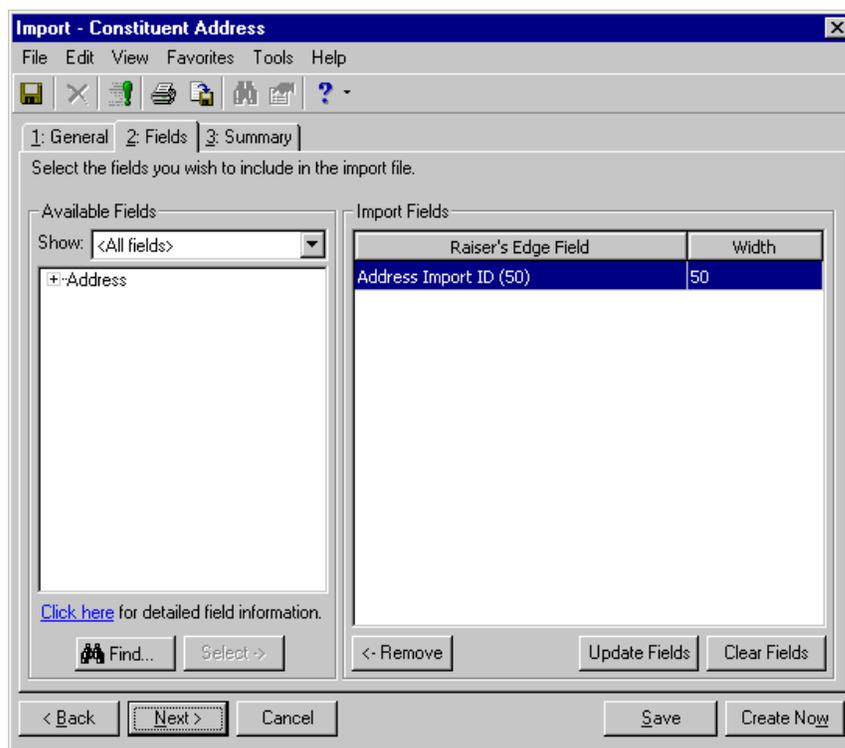
The screenshot shows a dialog box titled "Import - Constituent Address" with a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. The dialog has three tabs: "1: General", "2: Fields", and "3: Summary". The "General" tab is active. The "What do you want to do?" section has three radio buttons: "Import new records", "Update existing records", and "Create import file" (selected). An "Options" panel is open, showing "Include..." (disabled), "All records", "Include selected fields in the import file" (selected), and "Include all fields in the import file". The "What file do you wish to create?" section has a text field for "Import file:" containing "Constituent\_Address" and a browse button "...". The "What ID Field do you want to use?" section has three radio buttons: "Use the Import ID" (selected), "Use the Constituent ID", and "Use the Social Security Number". The "What is the format of this import file?" section has two radio buttons: "Delimited - Characters separate the fields" and "Fixed width - Fields and records have a set length" (selected). To the right of the selected option are disabled text boxes for "Rec. length:" and "No. of fields:". At the bottom are buttons for "< Back", "Next >" (highlighted), "Cancel", "Save", and "Create Now".

8. When you finish the General tab, you are ready to move to the Fields tab.

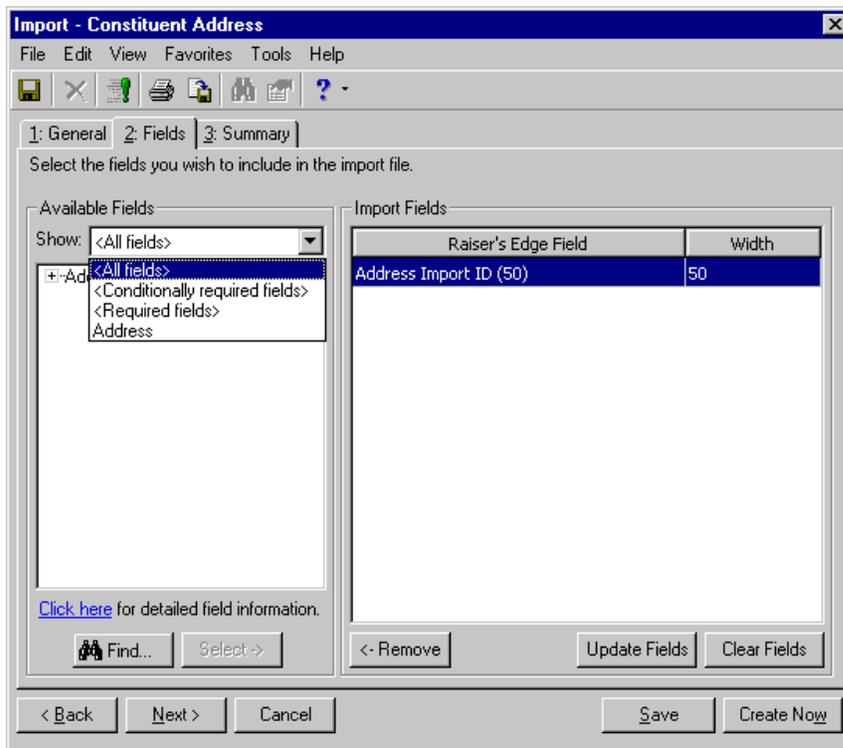
► **Completing the Fields tab when creating an import without field names — fixed width**

On this tab, you select the fields you want to include in the import file.

1. Select the Fields tab. If on the General tab, you selected **Include selected fields in the import file**, the Raiser's Edge Field box appears with only the fields required for the import type you are creating. If on the General tab, you selected **Include all fields in the import file**, skip to step 5.



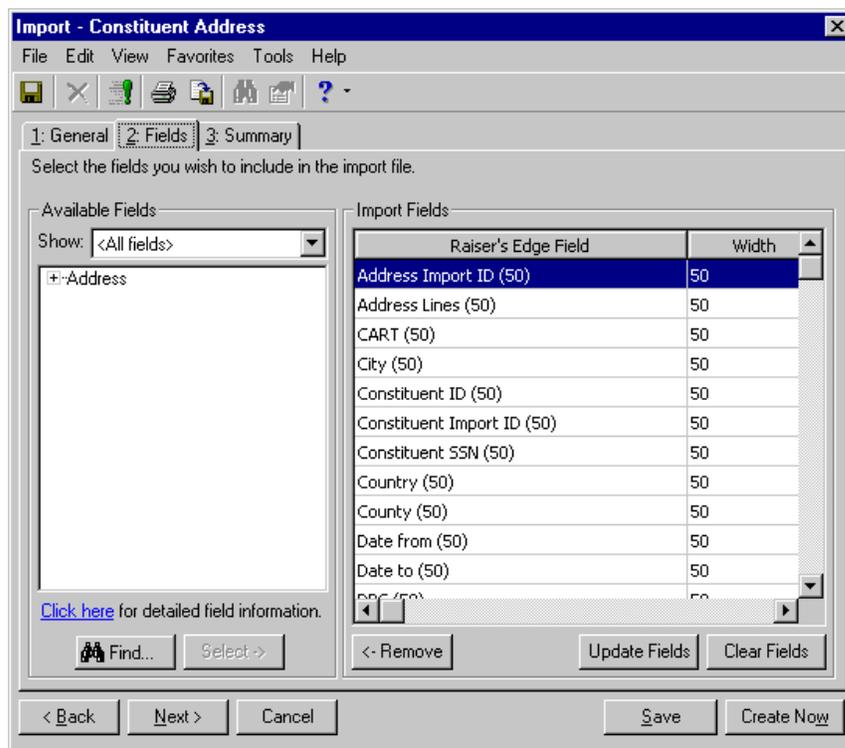
- In the **Available Fields** frame, you must select the additional fields you want to include. Use the **Show** field to filter the options appearing in the tree view.



For example, if you want to see only fields for an address import, select “Address”; If you want to see only the required fields, you can select “Required fields” or “Conditionally required” fields. You can select “All fields” to display every field category.

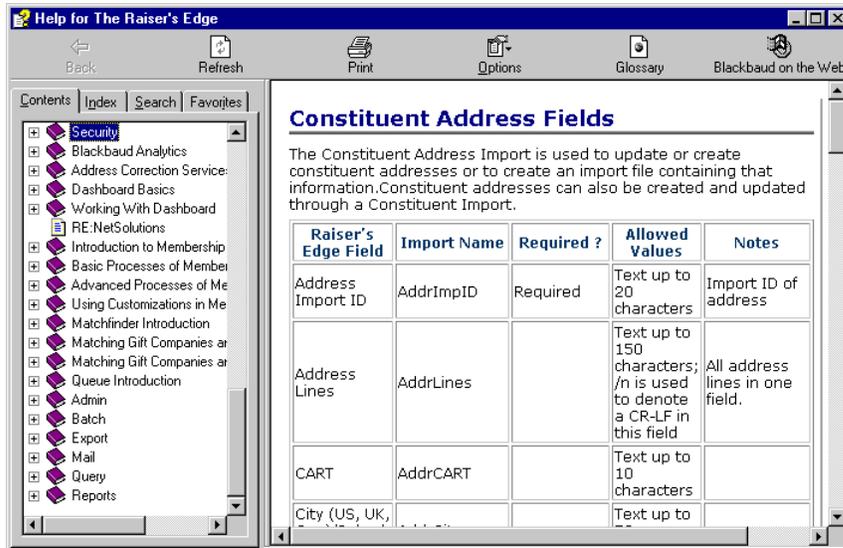
- In the tree view on the left, click the plus sign next to the category heading to view all fields available for that category.
- Highlight the field you want to include in your import file, and click **Select** to move the field into the **Raiser’s Edge Field** box. Repeat this step until you have all the import fields you want to include in your import file in the **Raiser’s Edge Field** box.

5. If on the General tab, you selected **Include all fields in the import file**, all fields default into the **Raiser's Edge Field** box on the right.



6. You can edit the field selections on this screen.
- To remove a field, highlight it and click **Remove**.
  - To make sure the list of fields is up-to-date, click **Update Fields**.
  - To remove all fields from the **Raiser's Edge Field** box, click **Clear Fields**.
  - If you want to see the required fields, in the **Show** field in the **Available Fields** frame, select "Required fields" or "Conditionally required" fields.

- If you need more information about fields available for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



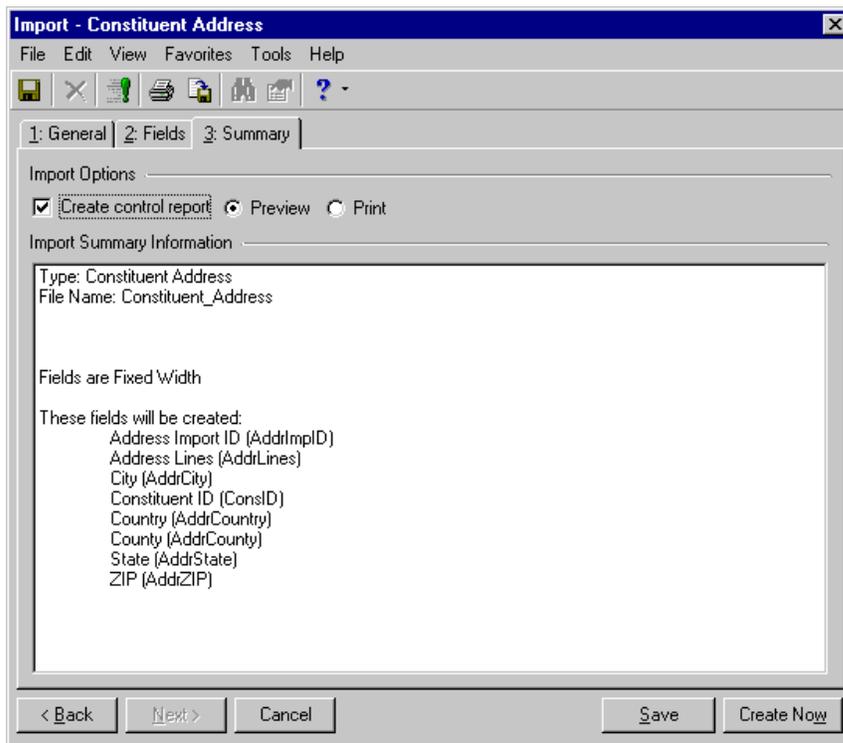
To close this screen and return to the Fields tab, click the “X” in the upper, right corner.

- When you finish the Fields tab, you are ready to move to the Summary tab.

► **Completing the Summary tab when creating an import without field names — fixed width**

This tab gives you an overview of the choices you made while creating your import file. You can review the information and make any necessary changes before you actually create the file.

- Select the Summary tab.



2. Complete the **Import Options** frame.

**Create control report** - Mark this checkbox to generate a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

3. The **Import Summary Information** frame displays the import parameters and other information you selected for your import.
4. When you complete the Summary tab, you are ready to run the import.

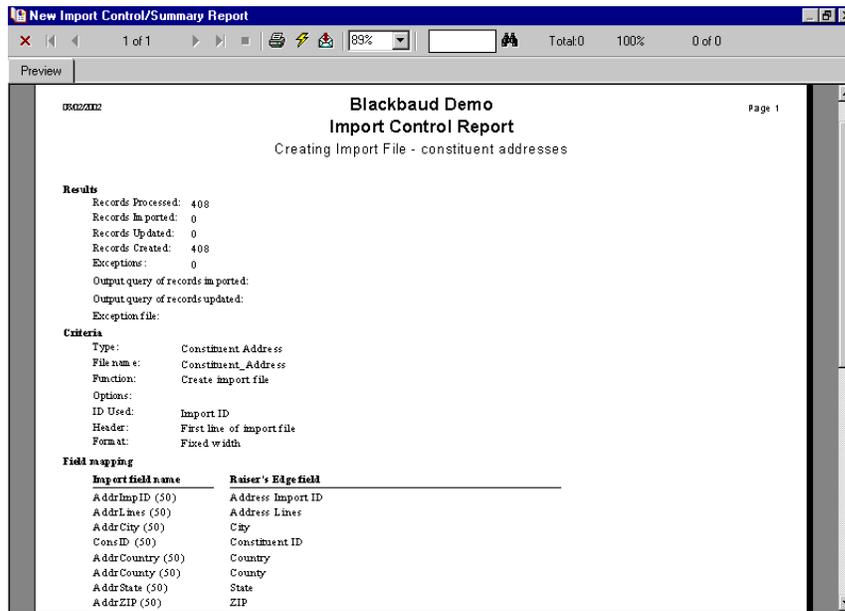
▶ **Running an import without field names — fixed width**

1. After you complete the parameter tabs, defining your import file, click **Create Now**. A screen appears tracking the process. The processing time varies, based on the size of your database and the number of fields you included in your import file.
2. When the process is complete, the Import Complete! screen appears, displaying the number of records processed and included in the import file and the number of exceptions.

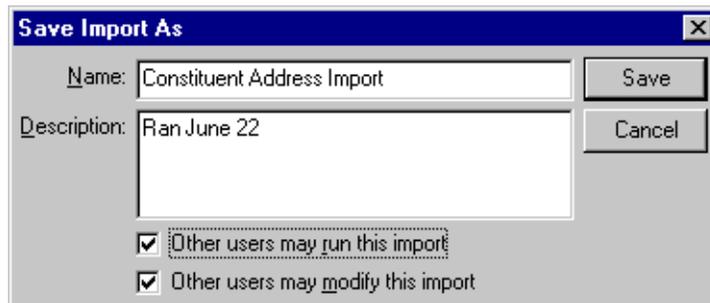


**Note:** If you did not mark the **Create control report** checkbox on the Summary tab, a **Preview Report** button appears on the Import Complete! screen. Click this button if you want to view the control report.

3. Click **Close**. If you marked the **Create control report** checkbox on the Summary tab, the Control Report appears.



4. You can **Print** or **Export** this report. To close the report and return to the import parameter screen, click the "X" in the upper, right corner.
5. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.
6. On the Import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.



7. Enter a **Name** and **Description** for your import. You can also allow other users to run or modify the import parameter file.
8. Click **Save** to return to the import parameter screen.
9. To exit the import parameter screen, from the menu bar, select **File, Close**. You return to the Import screen.

## Creating an Import With Field names

This option imports fields with header records. This means you define each field included in your import. To define the fields, you must assign code names to each field you want to import. These code names appear on the first line of your import file and function as headers.

**Note:** For more information about code names, see “Import Tables” on page 95.

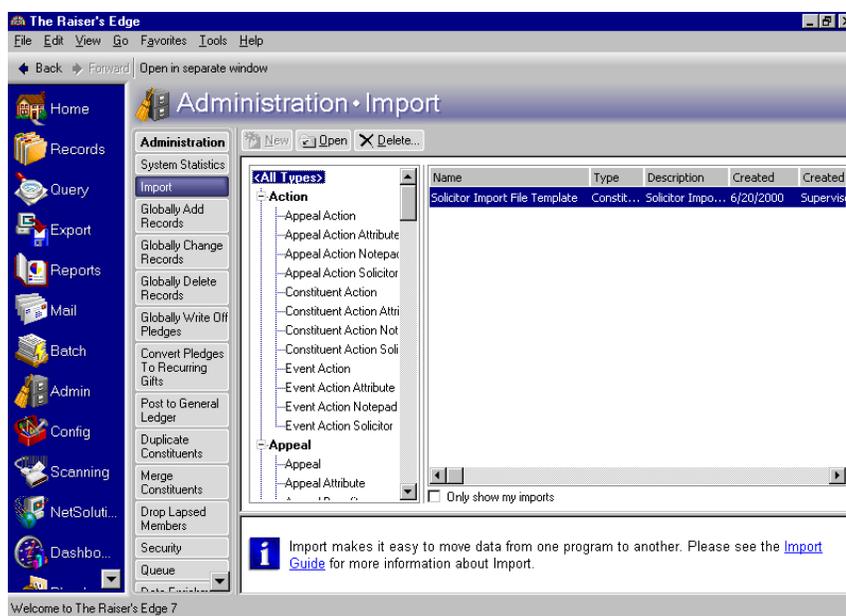
For example, you want to run a constituent import and include the following *Raiser’s Edge* fields: **First name**, **Last name**, and **Marital status**. Based on the information in the Import Tables, you must include the following entries in the first row of your header record: FirstName, LastName, and MrtlStat.

► **Completing the General tab when creating an import with field names**

**Warning:** Make sure every row in the last column of your import file is populated with data. The system then knows when to move on to the next record. To do this, open your file in *Excel* and move one of the required field columns to the last column in the file.

On this tab you identify what you want the program to do, the import file you want to create, how you want records identified, and how your import file is formatted.

1. From the **Import** page, in the tree view on the left, select the type of import record you want to create.



**Note:** *The Raiser’s Edge* sample database includes several sample import files. These files may prove useful as guides when you create import files. You can access the sample files in **Import** by clicking the ellipsis in the **What file do you wish to import?** frame. The Select Import File screen appears, and you can map to the sample import files, which are stored in RE7/Help folders. In the **Files of type** field, select “All Files”.

2. On the action bar, click **New Import**. The Import screen appears, displaying the General tab.

**Import - Constituent Address**

File Edit View Favorites Tools Help

1: General | 2: File Layout | 3: Fields | 4: Summary

**What do you want to do?**

Import new records

Update existing records

Create import file

**Options**

Validate data only

Create new table entries

Import records not found as new records

**What file do you wish to import?**

Import file:  ...

**How do you want the system to identify existing constituents?**

Use the Import ID

Use the Constituent ID

Use the Social Security Number

**What is the format of this import file?**

Delimited - Characters separate the fields

Fixed width - Fields and records have a set length Rec. length:  No. of fields:

< Back Next > Cancel Save Import Now

3. In the **What do you want to do?** frame, select **Create import file**.

**Note:** The **Import new records** and **Update existing records** options also offered in the **What do you want to do?** frame are each covered in their own section in this chapter.

4. Complete the checkboxes and buttons enabled in the **Options** frame.
  - **Include** - Click this button and select the records you want to include in your import file.
  - **All records** includes all records in your database.

**Selected records** includes only records you saved in a query. If you choose this option, the Open Query screen appears.

Query Name	Query Description	Type
All Volunteers	Query for use with th...	Individual
Blank Primary Addressee		Constituent
Board Members	This query is being us...	Constituent
Corporate Donors		Constituent
Development Committee (Const Attribute)	This query is being us...	Constituent
Donors for 'This Month'	Donors who have giv...	Constituent
Giving less than \$10.00		Individual
Inactive Records	This query is being us...	Constituent
Individual search for Supervisor	Used by the Search S...	Individual
Invalid Address/Blank Preferred Address	This query is being us...	Constituent

You can use the Open Query screen to search for an existing query or to create a new query. To search for a query, enter the criteria you want to use to filter the results. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**; to create query, click **Add Now**.

**Note:** For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

**Records changed as of** adds a date field. Enter the date and all records changed as of the date you enter are included in the import file.

- **Include selected fields in the import file** - The program defaults to this option. If selected, on the Fields tab you must select and order the fields you want to include in your import file.

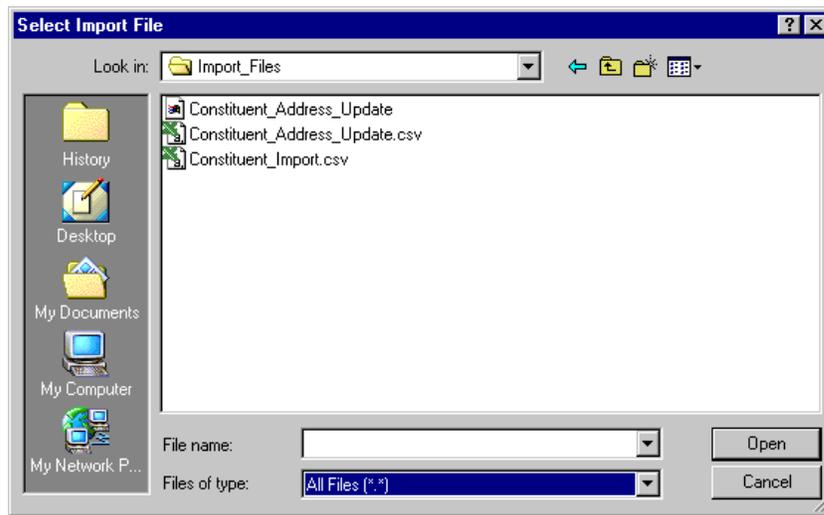
If you select this option, when you create your import file, the program does not require the usual required fields. For example, you can create an import file without a key indicator or import ID. However, you cannot import this file back into your database.

**Note:** **Rec length** and **No. fields** are always disabled when you select the **Create import file** option. The program automatically completes these fields based on the fields you select to import.

- **Include all fields in the import file** - This option includes in your import all fields related to the selected import type. If you select this option, all the fields are automatically loaded on the Fields tab by field names in the fixed-width format. The **Rec. length** and **No. of fields** fields in the **What is the format of this import file?** frame are disabled. The program automatically sets this information. Also, if you select this option, the program deletes whatever you entered on the Fields tab, replacing your entries with all fields.

5. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating.

If you want to map to a specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.



Locate the directories, enter a **File name**, and select a file type in the **Files of type** field. Click **Open** to return to the Import screen.

- On the Import screen, complete the **What ID field do you want to use?** frame. All the IDs must be unique. You can select one of the following:

**Note:** Because the Import ID is a non-editable field, we recommend this option to be the most reliable for identifying your existing records.

- **Use the Import ID** - The program defaults to this option. This is a program-generated number the program assigns your records. If you select this option, the program uses the import ID to identify existing records.
- **Use the Constituent ID** - If you select this option, the program uses the constituent ID number to identify existing records. The program generates this number based on your selection in **Business Rules** in *Configuration*.
- **Use the Social Security Number** - If you select this option, the program uses the constituent Social Security Number to identify existing records. You enter this number on the constituent records.

**Note:** The **Fixed Width** option offered in the **What is the format of this import file?** frame is covered in “Creating an Import Without Field Names - Fixed Width” on page 39.

7. In the **What is the format of this import file?** frame, select **Delimited - Characters separate the fields**. If you select this option, carriage returns and line feed breaks do not separate the fields in your import. You must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: “Phone”, “Address”, “Name”, etc.

The screenshot shows the 'Import - Constituent Address' dialog box with the 'General' tab selected. The dialog has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with icons for file operations. Below the toolbar are four tabs: 1: General, 2: File Layout, 3: Fields, and 4: Summary. The 'General' tab contains the following sections:

- What do you want to do?**
  - Import new records
  - Update existing records
  - Create import file
- Options**
  - All records**
  - Include selected fields in the import file
  - Include all fields in the import file
- What file do you wish to create?**
  - Import file: C:\Ms\MS\Import\_Files\Constituent\_Address
- What ID Field do you want to use?**
  - Use the Import ID
  - Use the Constituent ID
  - Use the Social Security Number
- What is the format of this import file?**
  - Delimited - Characters separate the fields
  - Fixed width - Fields and records have a set length

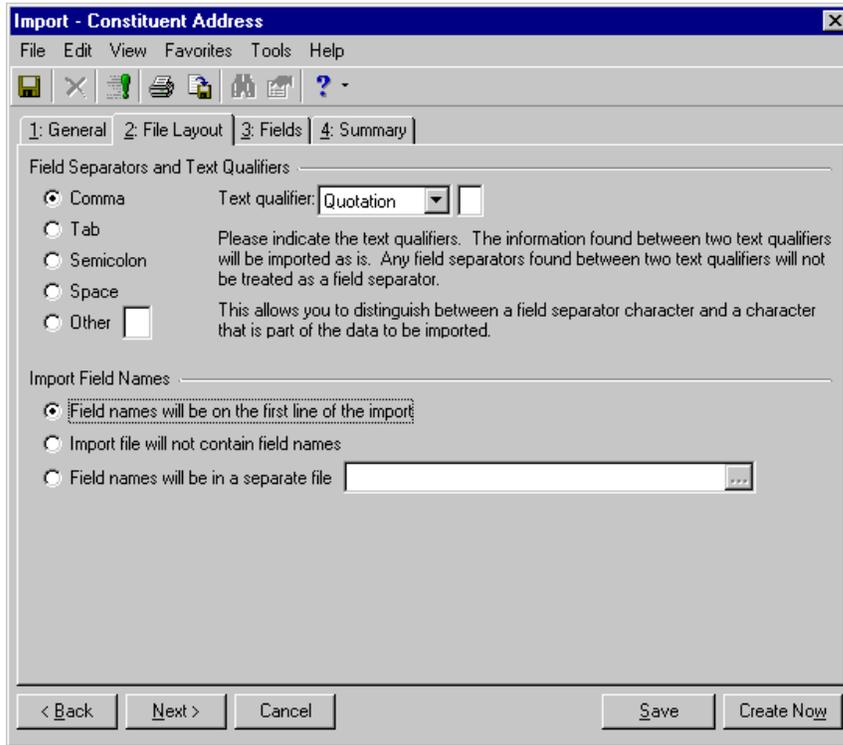
At the bottom of the dialog, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Create Now'. The 'Rec. length' and 'No. of fields' fields are empty.

8. When you finish the General tab, you are ready to move to the File Layout tab.

► **Completing the File Layout Tab when creating an import with field names**

This tab allows you to define how you want the program to read the import file. The screen changes based on your selection in the **What is the format of this import** frame on the General tab. This procedure explains the delimited format option.

1. Select the File Layout tab.



2. Complete the **Field Separators and Text Qualifiers** frame. Although the program defaults to the **Comma** option, you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**. The **Other** option allows you to define the field separator, using a separator other than the ones listed. Complete the **Text qualifier** field. This defines the beginning and end points of your field.

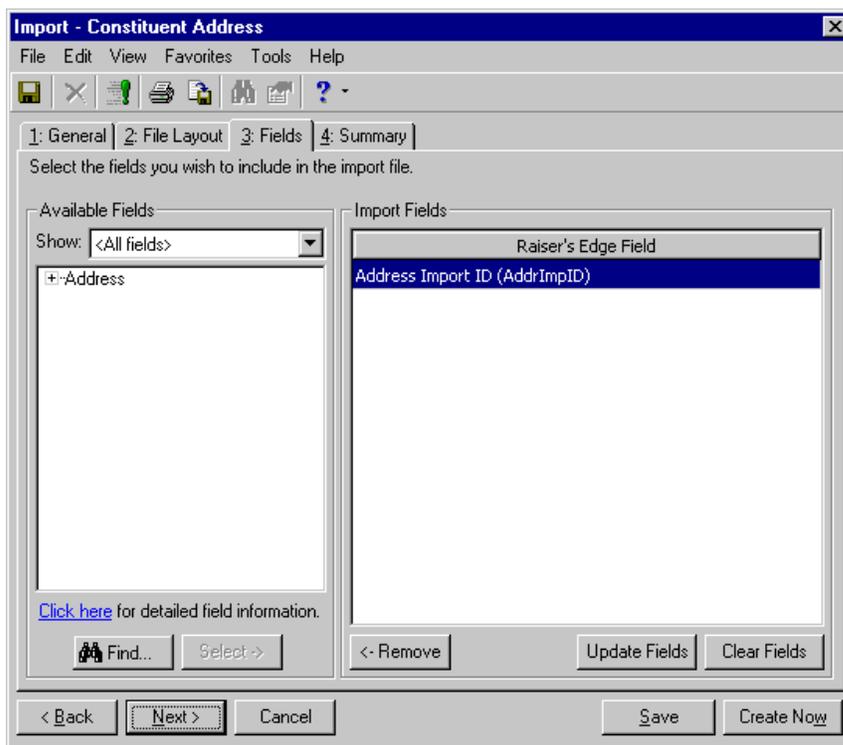
The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — “100 Main Street, Apt. 23F” — the program knows all text contained between the text qualifier is part of the same field.

3. In the **Import Field Names** frame, select **Field names will be on the first line of the import file**. This option tells the program to save the first line of your import for field names.
4. When you finish the File Layout tab, you are ready to move to the Fields tab.

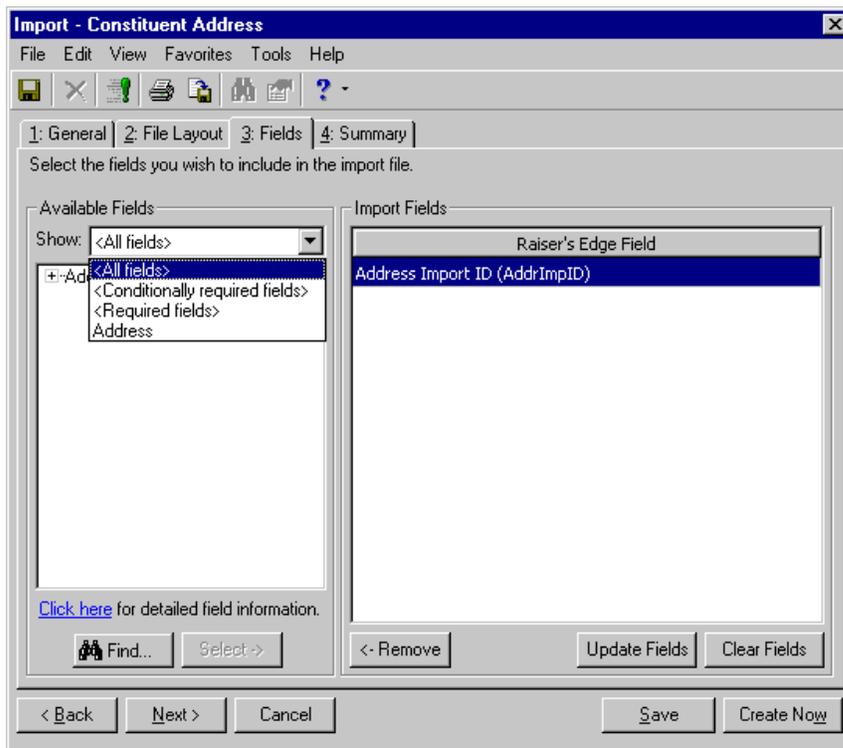
► **Completing the Fields tab when creating an import with field names**

On this tab, you select the fields you want to include in the import file in the order you want them to appear in the file. The header record you enter in your import file identifies the fields in *The Raiser's Edge*.

1. Select the Fields tab. If on the General tab, you selected **Include selected fields in the import file**, the Raiser's Edge Field box appears with only the fields required for the import type you are creating. If on the General tab, you selected **Include all fields in the import file**, skip to step 5.



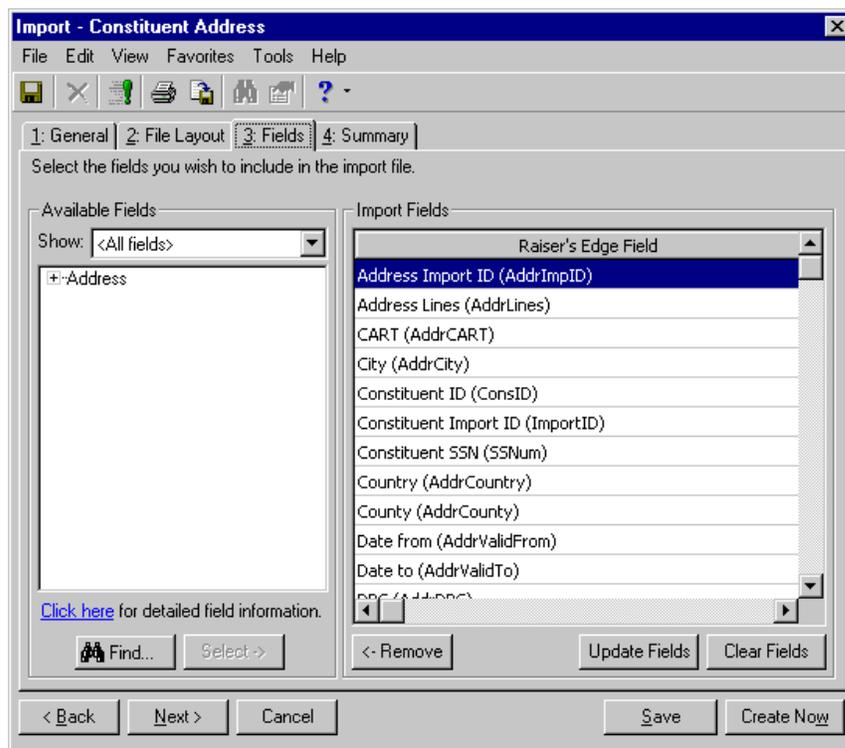
- In the **Available Fields** frame, you must select the additional fields you want to include. Use the **Show** field to filter the options appearing in the tree view.



For example, if you want to see only fields for an address import, select “Address”; If you want to see only the required fields, you can select “Required fields” or “Conditionally required” fields. You can select “All fields” to display every field category.

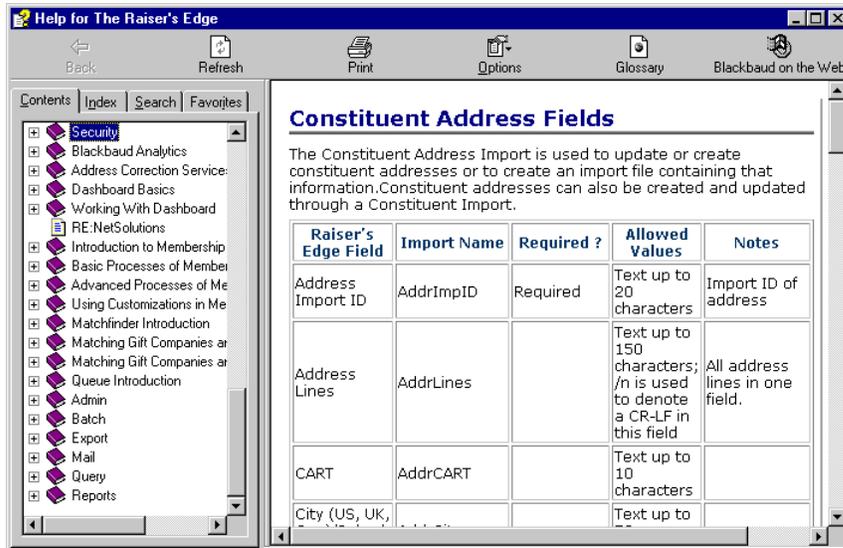
- In the tree view on the left, click the plus sign next to the category heading to view all fields available for that category.
- Highlight the field you want to include in your import file, and click **Select** to move the field into the **Raiser’s Edge Field** box. Repeat this step until you have all the import fields you want to include in your import file in the **Raiser’s Edge Field** box.

5. If on the General tab, you selected **Include all fields in the import file**, all fields default into the **Raiser's Edge Field** box on the right.



6. You can edit the field selections on this screen.
- To remove a field, highlight it and click **Remove**.
  - To make sure the list of fields is up-to-date, click **Update Fields**.
  - To remove all fields from the **Raiser's Edge Field** box, click **Clear Fields**.
  - If you want to see the required fields, in the **Show** field in the **Available Fields** frame, select "Required fields" or "Conditionally required" fields.

7. If you need more information about fields available for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



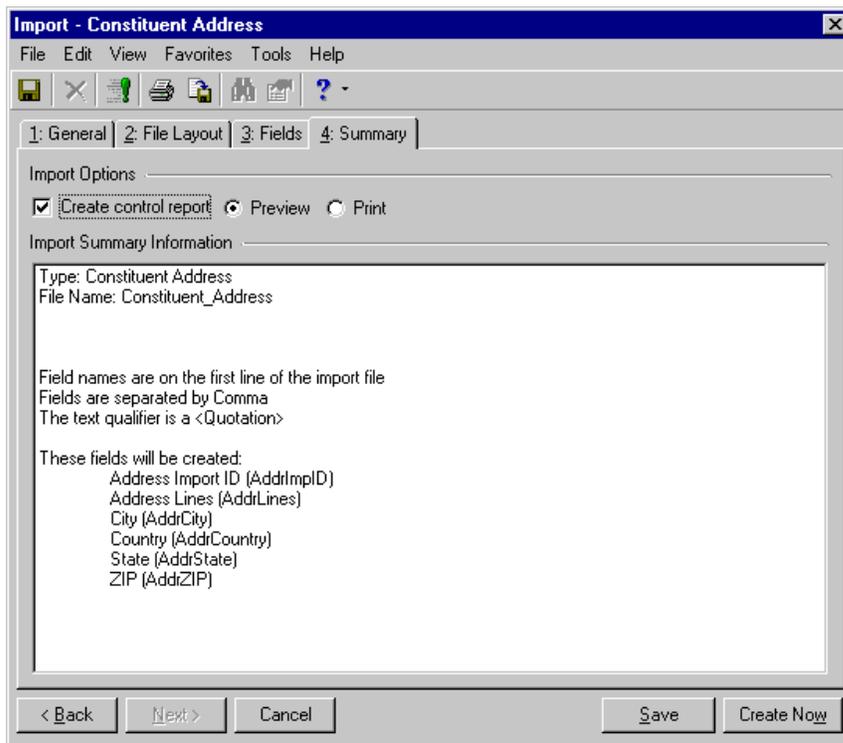
To close this screen and return to the Fields tab, click the "X" in the upper, right corner.

8. When you finish the Fields tab, you are ready to move to the Summary tab.

► **Completing the Summary tab when creating an import with field names**

The Summary tab allows you to review the import parameters and other information you selected for your import. It also offers miscellaneous import options.

1. Select the Summary tab.



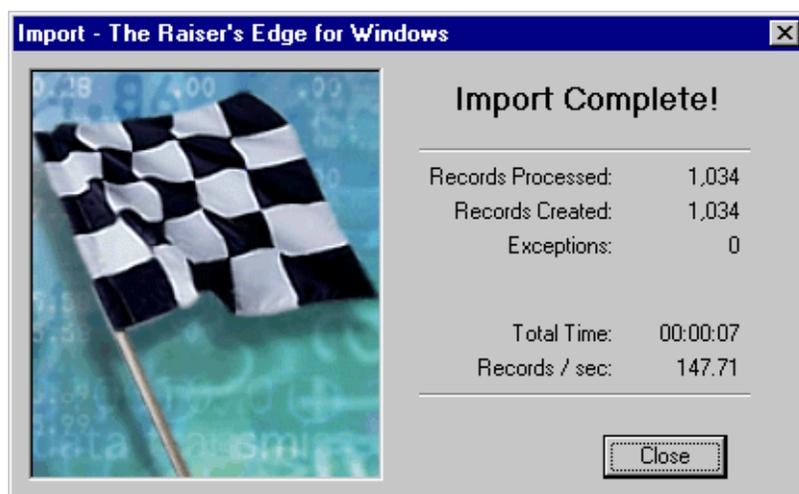
2. Complete the **Import Options** frame.

**Create control report** - Mark this checkbox to generate a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

3. The **Import Summary Information** frame displays the import parameters and other information you selected for your import.
4. When you complete the Summary tab, you are ready to run the import.

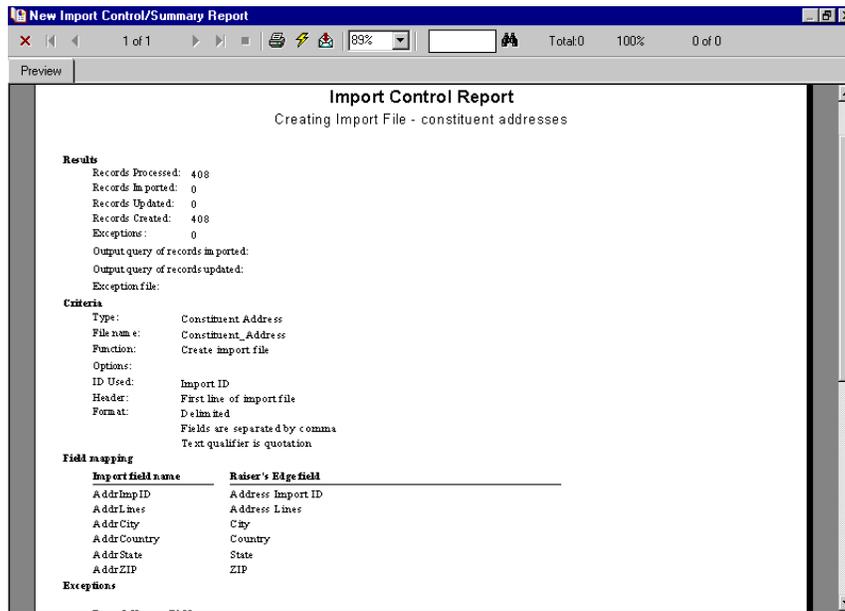
▶ **Running an import with field names**

1. After you complete the parameter tabs, defining your import file, click **Create Now**. A screen appears tracking the process. The processing time varies, based on the size of your database and the number of fields you included in your import file.
2. When the process is complete, the Import Complete! screen appears, displaying the number of records processed and included in the import file and the number of exceptions.

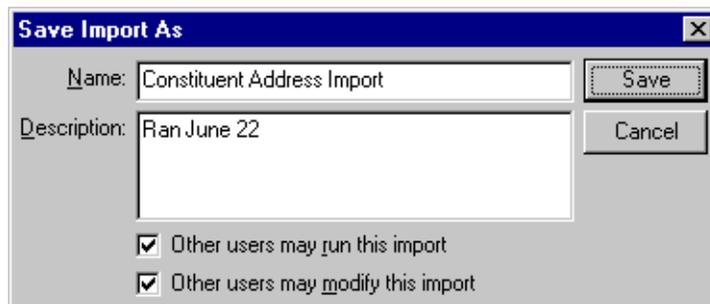


**Note:** If you did not mark the **Create control report** checkbox on the Summary tab, a **Preview Report** button appears on the Import Complete! screen. Click this button if you want to view the control report.

3. Click **Close**. If you marked the **Create control report** checkbox on the Summary tab, the Control Report appears.



4. You can **Print** or **Export** this report. To close the report and return to the import parameter screen, click the "X" in the upper, right corner.
5. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.



6. Enter a **Name** and **Description** for your import. You can also allow other users to run or modify the import parameter file.
7. Click **Save** to return to the import parameter screen.
8. To exit the import parameter screen, from the menu bar, select **File, Close**. You return to the Import screen.

## Creating an Import with a Separate Header Record

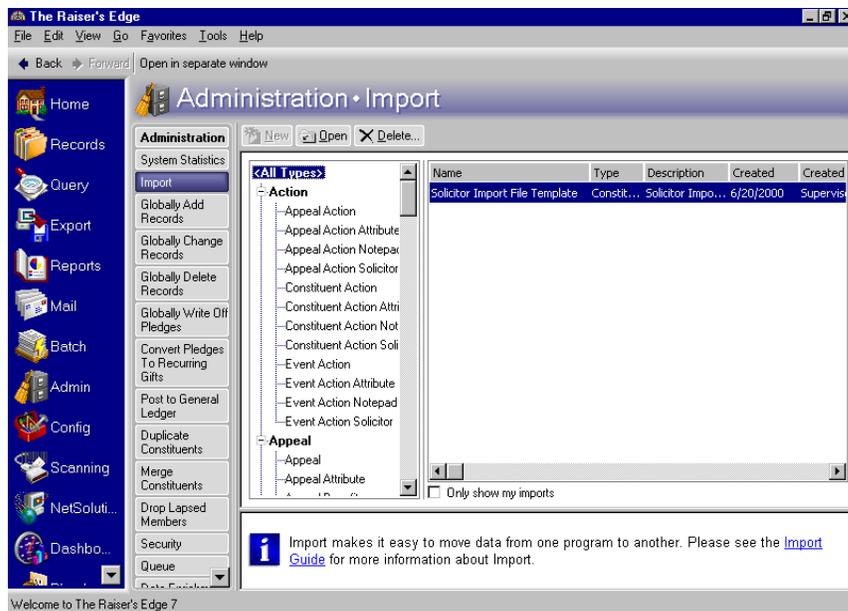
This option includes record information from fields defined in a file other than the import file. The header and import records are formatted using the field code names, separators, and text qualifiers explained in the previous sections, but the header record and the import file are contained in separate files.

► **Completing the General tab when creating an import with a separate header record**

**Warning:** Make sure every row in the last column of your import file is populated with data. The system then knows when to move on to the next record. To do this, open your file in *Excel* and move one of the required field columns to the last column in the file.

On this tab you identify what you want the program to do, the import file you want to create, how you want records identified, and how your import file is formatted.

1. From the **Import** page, in the tree view on the left, select the type of import record you want to create.



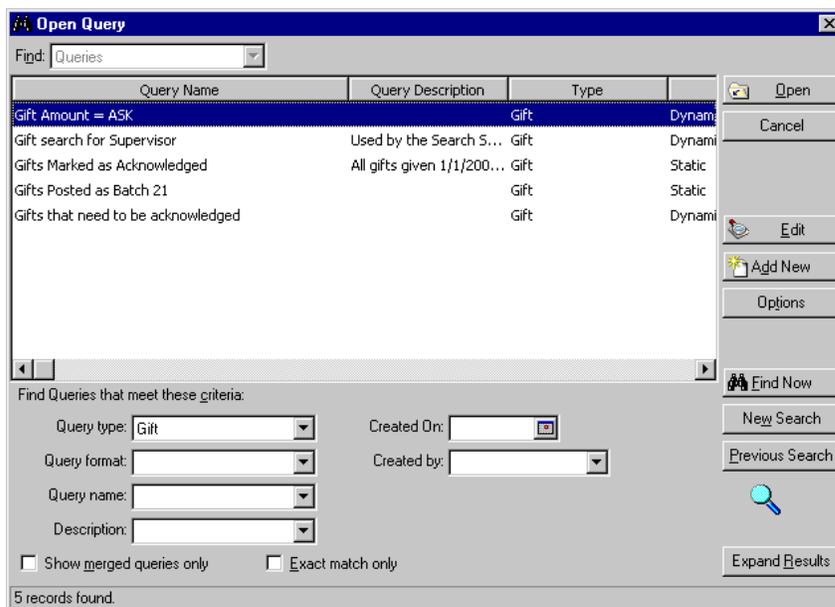
2. On the action bar, click **New Import**. The Import screen appears, displaying the General tab.

3. In the **What do you want to do?** frame, select **Create import file**.

**Note:** The **Import new records** and **Update existing records** options also offered in the **What do you want to do?** frame are each covered in their own section in this chapter.

4. Complete the checkboxes and buttons enabled in the **Options** frame.
  - **Include** - Click this button and select the records you want to include in your import file.
  - **All records** includes all records in your database.

**Selected records** includes only records you saved in a query. If you choose this option, the Open Query screen appears.



You can use the Open Query screen to search for an existing query or to create a new query. To search for a query, you can enter the criteria you want to use to filter the results. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**; to create query, click **Add Now**.

**Note:** For more information about creating and accessing queries, see the Query chapter in the *Query & Export Guide*.

**Records changed as of** adds a date field. Enter the date and all records changed as of the date you enter are included in the import file.

- **Include selected fields in the import file** - The program defaults to this option. If selected, on the Fields tab you must select and order the fields you want to include in your import file.

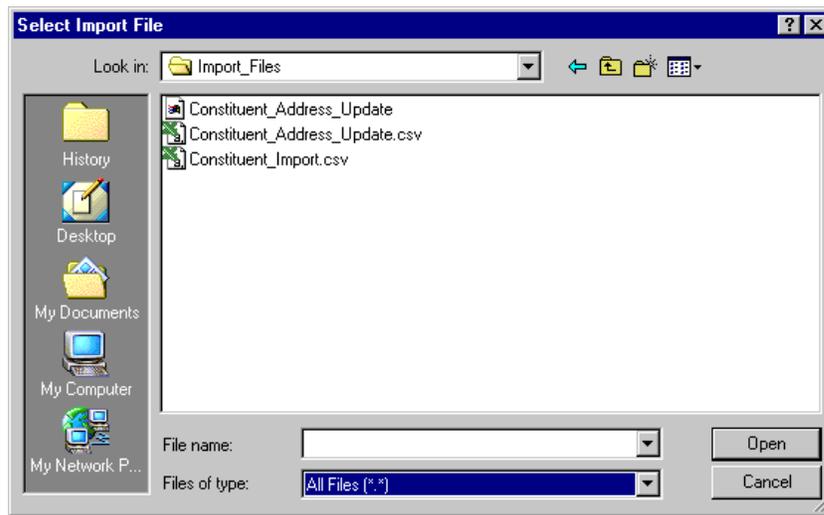
If you select this option, when you create your import file, the program does not require the usual required fields. For example, you can create an import file without a key indicator or import ID. However, you cannot import this file back into your database.

**Note:** **Rec length** and **No. fields** are always disabled when you select the **Create import file** option. The program automatically completes these fields based on the fields you select to import.

- **Include all fields in the import file** - This option includes in your import all fields related to the selected import type. If you select this option, all the fields are automatically loaded on the Fields tab by field names in the fixed-width format. The **Rec. length** and **No. of fields** fields in the **What is the format of this import file?** frame are disabled. The program automatically sets this information. Also, if you select this option, the program deletes whatever you entered on the Fields tab, replacing your entries with all fields.

5. In the **What file do you wish to create?** frame, enter the **Import file** name. This is the name of the file you are creating.

If you want to map to a specific directory and subdirectory in which you want the import file saved, click the ellipsis. The Select Import File screen appears.



Locate the directories, enter a **File name**, and select a file type in the **Files of type** field. Click **Open** to return to the Import screen.

6. On the Import screen, complete the **What ID field do you want to use?** frame. All the IDs must be unique. You can select one of the following:

**Note:** Because the Import ID is a non-editable field, we recommend this option to be the most reliable for identifying your existing records.

- **Use the Import ID** - The program defaults to this option. This is a program-generated number the program assigns your records. If you select this option, the program uses the import ID to identify existing records.
- **Use the Constituent ID** - If you select this option, the program uses the constituent ID number to identify existing records. The program generates this number based on your selection in **Business Rules** in *Configuration*.
- **Use the Social Security Number** - If you select this option, the program uses the constituent Social Security Number to identify existing records. You enter this number on the constituent records.

**Note:** The **Fixed Width** option offered in the **What is the format of this import file?** frame is covered in "Creating an Import Without Field Names - Fixed Width" on page 39.

7. In the **What is the format of this import file?** frame, select **Delimited - Characters separate the fields**. If you select this option, carriage returns and line feed breaks do not separate the fields in your import. You must select a character, such as a comma, to separate the fields. For example, if you select comma delimited, fields are separated as follows: "Phone", "Address", "Name", etc.

The screenshot shows the 'Import - Gift' dialog box with the 'General' tab selected. The dialog has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with icons for file operations. Below the toolbar are four tabs: 1: General, 2: File Layout, 3: Fields, and 4: Summary. The 'General' tab contains the following sections:

- What do you want to do?**
  - Import new records
  - Update existing records
  - Create import file
- Options**
  - Include... **All records**
  - Include selected fields in the import file
  - Include all fields in the import file
- What file do you wish to create?**
  - Import file: C:\Ms\MS\Import\_Files\Gift\_Import.txt
- What ID Field do you want to use?**
  - Use the Import ID
  - Use the Constituent ID
  - Use the Social Security Number
- What is the format of this import file?**
  - Delimited - Characters separate the fields
  - Fixed width - Fields and records have a set length

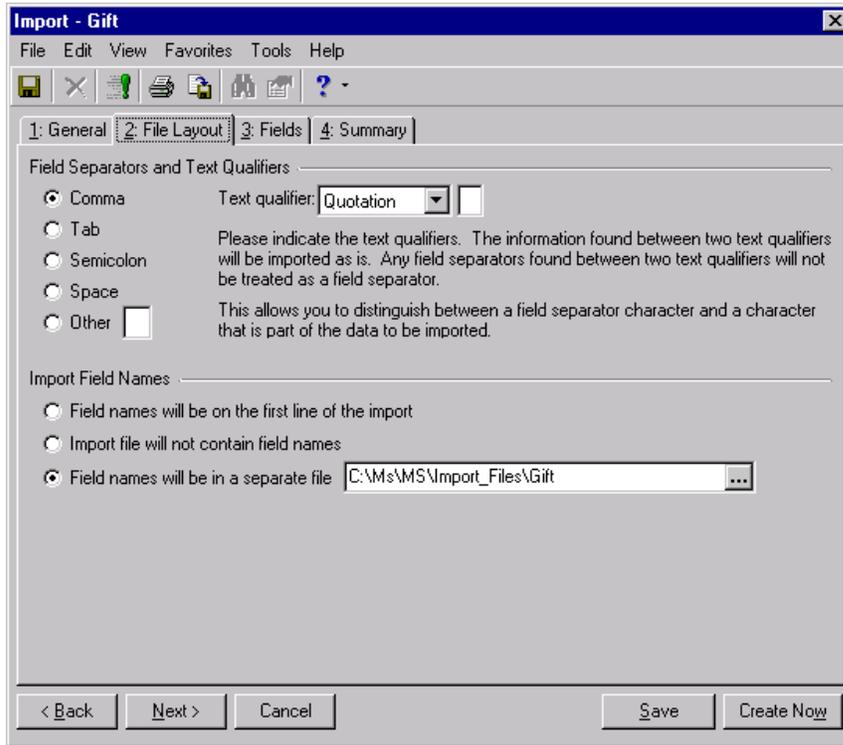
At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Create Now'. The 'Rec. length' and 'No. of fields' fields are empty.

8. When you finish the General tab, you are ready to move to the File Layout tab.

► **Completing the File Layout Tab when creating an import with a separate header record**

This tab defines how you want the program to lay out the import file. The screen changes based on your selections in the **What is the format of this import file?** frame on the General tab. This procedure explains the delimited format option.

1. Select the File Layout tab.



2. Complete the **Field Separators and Text Qualifiers** frame. Although the program defaults to the **Comma** option, you can select to separate fields using a **Tab**, **Semicolon**, **Space**, or **Other**. The **Other** option allows you to define the field separator, using a separator other than the ones listed. Complete the **Text qualifier** field. This defines the beginning and end points of your field.

The text qualifier also allows the program to distinguish between actual punctuation in a string of text and the field separator. For example, if you select the comma as your separator and then try to import the following address — 100 Main Street, Apt. 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field — “100 Main Street, Apt. 23F” — the program knows all text contained between the text qualifier is part of the same field.

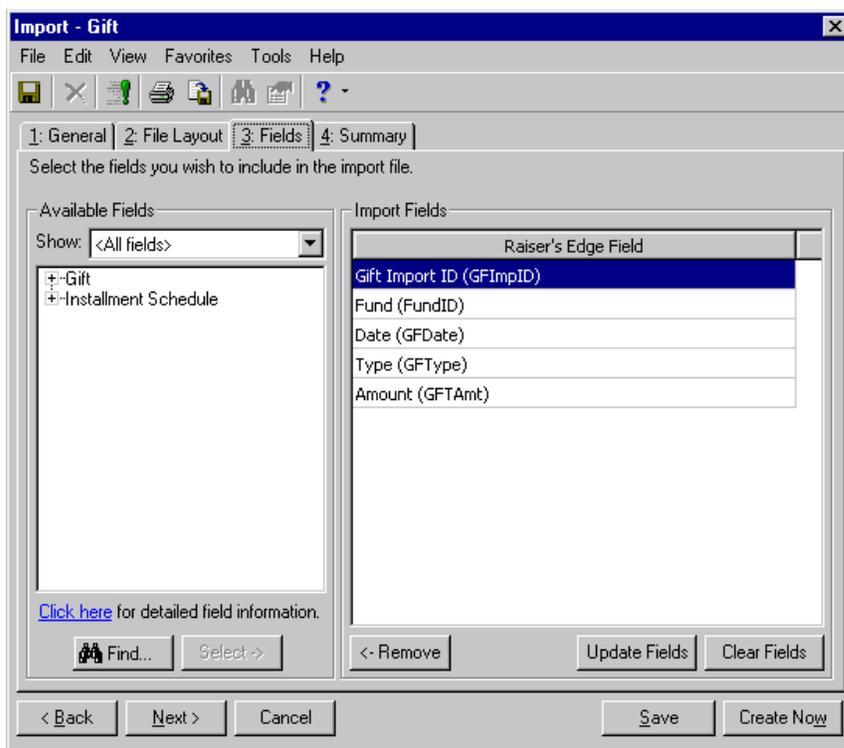
3. In the **Import Field Names** frame, select **Field names are in a separate file**. You must then enter the path to and name of the header file or click the ellipsis to map to the file.
4. When you finish the File Layout tab, you are ready to move to the Fields tab.

**Note:** For more information about the **Field names will be on the first line of the import file** option, see “Creating an Import With Field names” on page 50. For more information about the **Field names are in a separate file** option, see “Creating an Import with a Separate Header Record” on page 62.

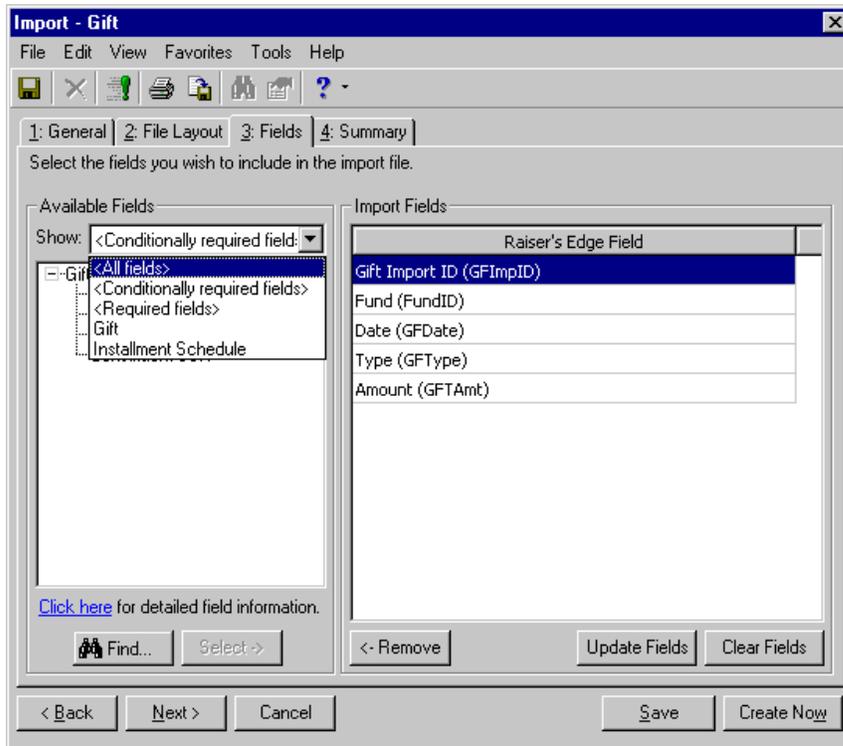
► **Completing the Fields tab when creating an import with a separate header record**

On this tab, you map the fields in the import file to the appropriate location in *The Raiser's Edge*. The header record you enter in your import file identifies the fields in *The Raiser's Edge* to which you want to import the information.

1. Select the Fields tab. If on the General tab, you selected **Include selected fields in the import file**, the Raiser's Edge Field box appears with only the fields required for the import type you are creating. If on the General tab, you selected **Include all fields in the import file**, skip to step 5.



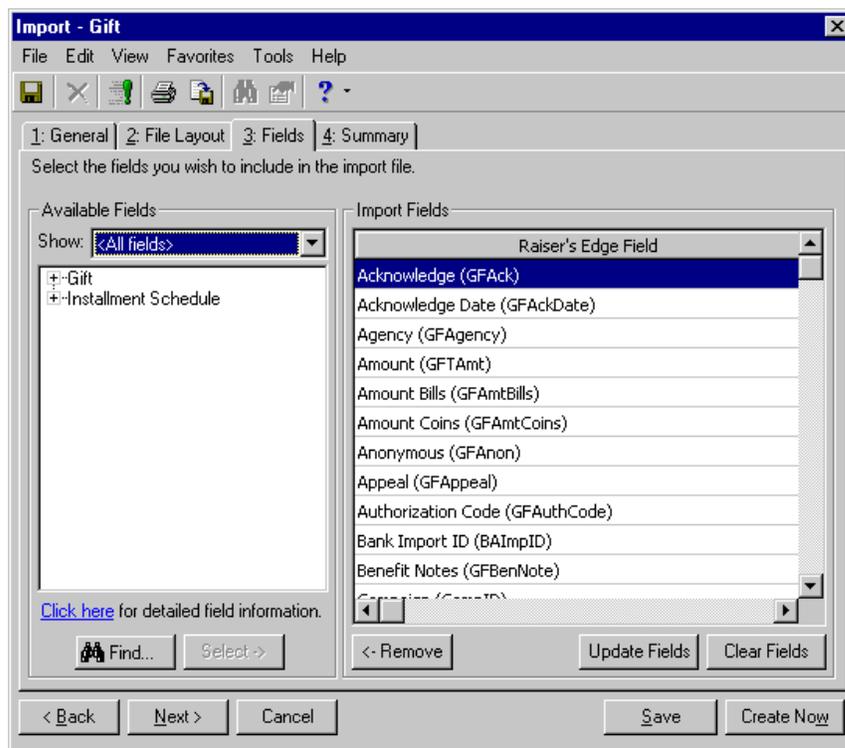
- In the **Available Fields** frame, you must select the additional fields you want to include. Use the **Show** field to filter the options appearing in the tree view.



For example, if you want to see only fields for a gift import, select “Gift”; if you want to see only the required fields, you can select “Required fields” or “Conditionally required” fields. You can select “All fields” to display every field category.

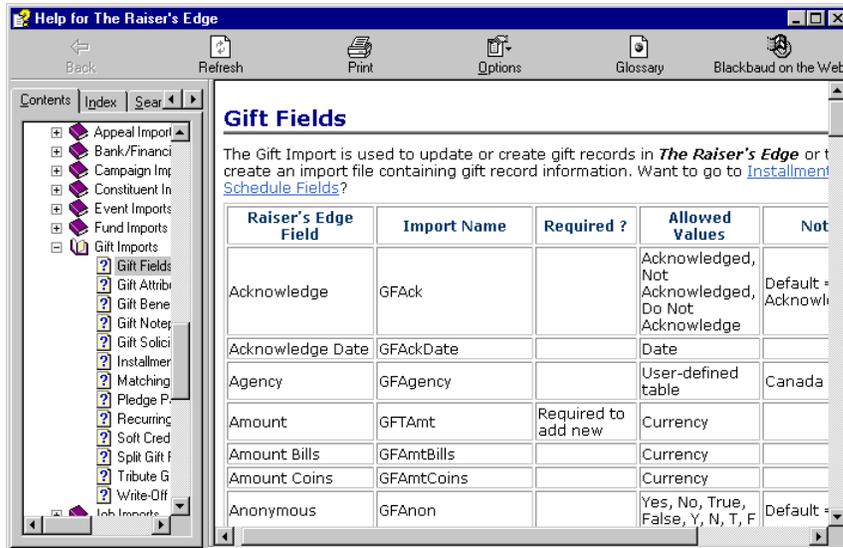
- In the tree view on the left, click the plus sign next to the category heading to view all fields available for that category.
- Highlight the field you want to include in your import file, and click **Select** to move the field into the **Raiser’s Edge Field** box. Repeat this step until you have all the import fields you want to include in your import file in the **Raiser’s Edge Field** box.

5. If on the General tab, you selected **Include all fields in the import file**, all fields default into the **Raiser's Edge Field** box on the right.



6. You can edit the field selections on this screen.
- To remove a field, highlight it and click **Remove**.
  - To make sure the list of fields is up-to-date, click **Update Fields**.
  - To remove all fields from the **Raiser's Edge Field** box, click **Clear Fields**.
  - If you want to see the required fields, in the **Show** field in the **Available Fields** frame, select "Required fields" or "Conditionally required" fields.

- If you need more information about fields available for this import type, click the **Click here for detailed field information** link in the **Available Fields** frame. The import fields list for the selected import type appears.



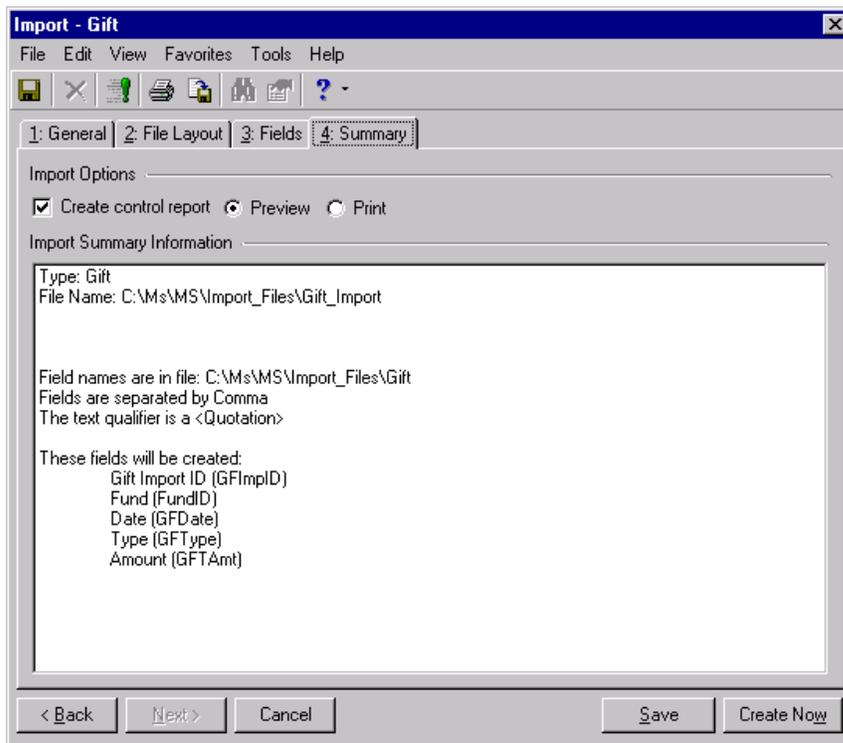
To close this screen and return to the Fields tab, click the “X” in the upper, right corner.

- When you finish the Fields tab, you are ready to move to the Summary tab.

► **Completing the Summary tab when creating an import with a separate header record**

The Summary tab reviews the import parameters and other information you selected for your import. It also offers miscellaneous import options.

- Select the Summary tab.



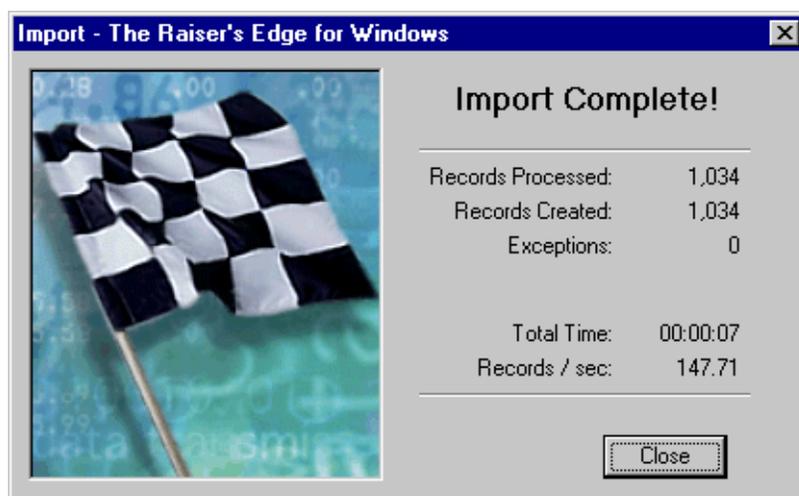
2. Complete the **Import Options** frame.

**Create control report** - Mark this checkbox to generate a report listing the criteria fields and criteria operators selected for the import. The report also shows the import name and the directory path where you saved the import. Select **Preview** to view the report on your screen before printing or **Print** to print the report.

3. The **Import Summary Information** frame displays the import parameters and other information you selected for your import.
4. When you complete the Summary tab, you are ready to run the import.

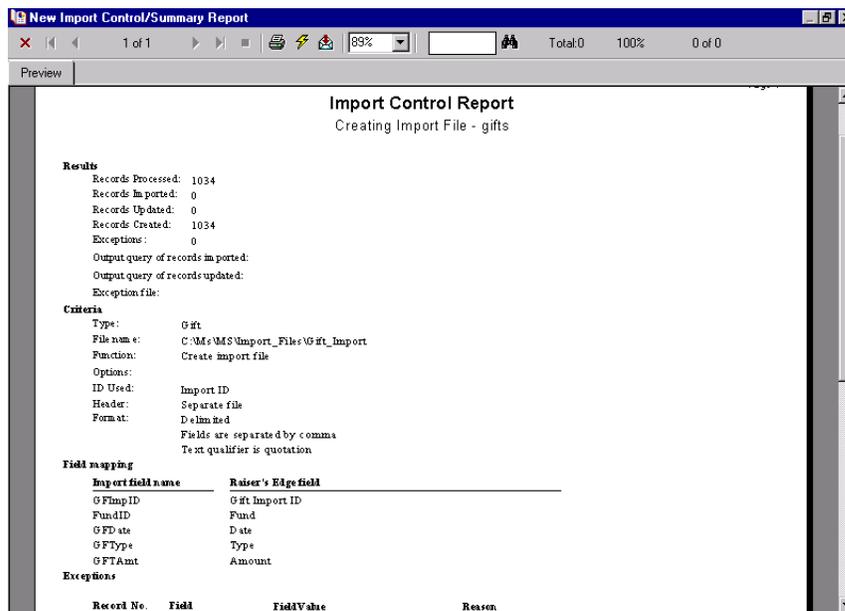
▶ **Running an import with a separate header record**

1. After you complete the parameter tabs, defining your import file, click **Create Now**. A screen appears tracking the process. The processing time varies, based on the size of your database and the number of fields you included in your import file.
2. When the process is complete, the Import Complete! screen appears, displaying the number of records processed and included in the import file and the number of exceptions.

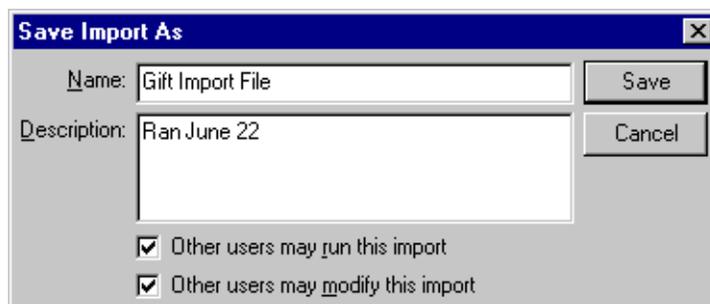


**Note:** If you did not mark the **Create control report** checkbox on the Summary tab, a **Preview Report** button appears on the Import Complete! screen. Click this button if you want to view the control report.

3. Click **Close**. If you marked the **Create control report** checkbox on the Summary tab, the Control Report appears.



4. You can **Print** or **Export** this report. To close the report and return to the import parameter screen, click the "X" in the upper, right corner.
5. On the import parameter screen, click **Save** to save the import parameter file. The Save Import As screen appears.



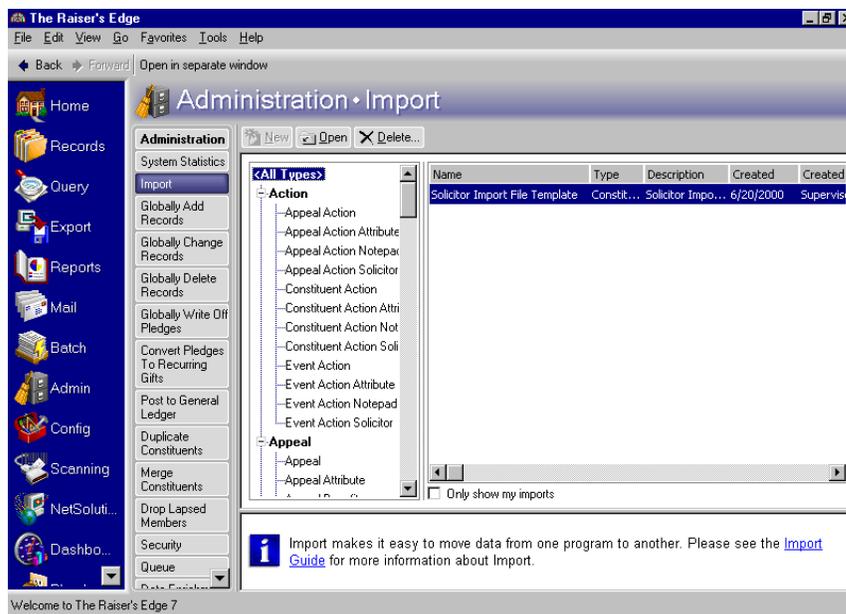
6. Enter a **Name** and **Description** for your import. You can also allow other users to run or modify the import parameter file.
7. Click **Save** to return to the import parameter screen.
8. To exit the import parameter screen, from the menu bar, select **File, Close**. You return to the Import screen.

## Exporting an import file

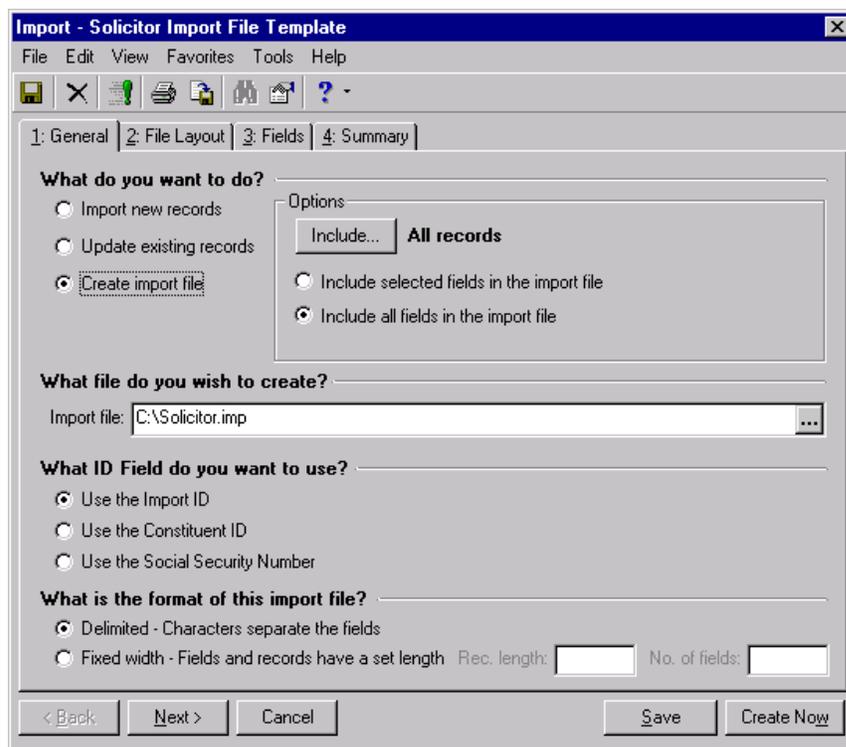
From **Import**, you can export any saved import file to another application. For example, if your organization has several branch offices or others with whom you want to share import parameter settings, you can export the settings to a disk and send the disk to the other offices.

## ► Exporting an import file

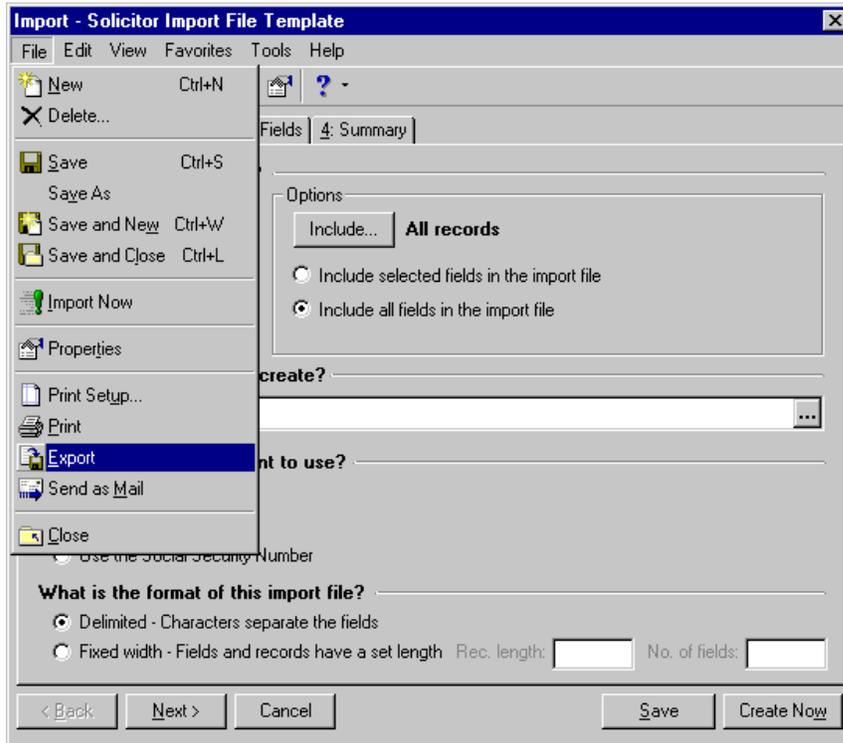
1. From the **Import** page, in the tree view on the left side of the screen, select the type of import record you want to export. All import files saved for the selected import type appear in the grid on the right side of your screen.



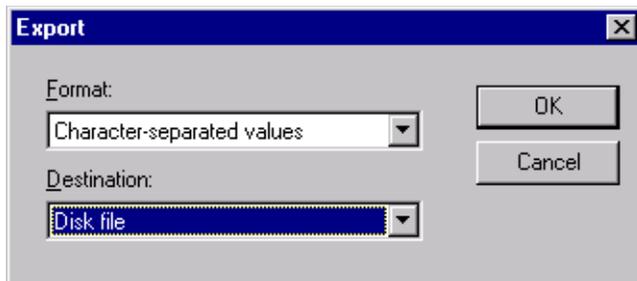
2. In the grid, select the import parameter file you want to export and click **Open**. The import parameter screen appears.



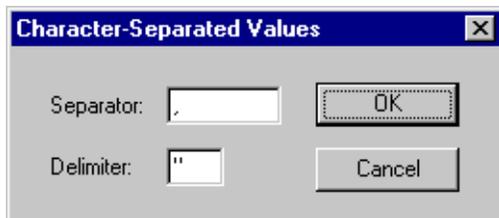
- From the menu bar, select **File, Export**.



The Export screen appears.

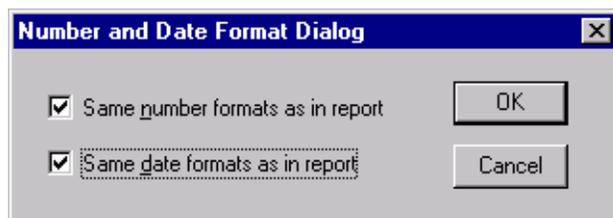


- In the **Format** field, select how you want the export file formatted. For more information on all of the **Format** options, please see the Export chapter in the *Query & Export Guide*.
- In the **Destination** field, select where you want the exported data sent.
- Click **OK**. If you selected “Character-separated values” as your **Format**, the Character-Separated Values screen appears.

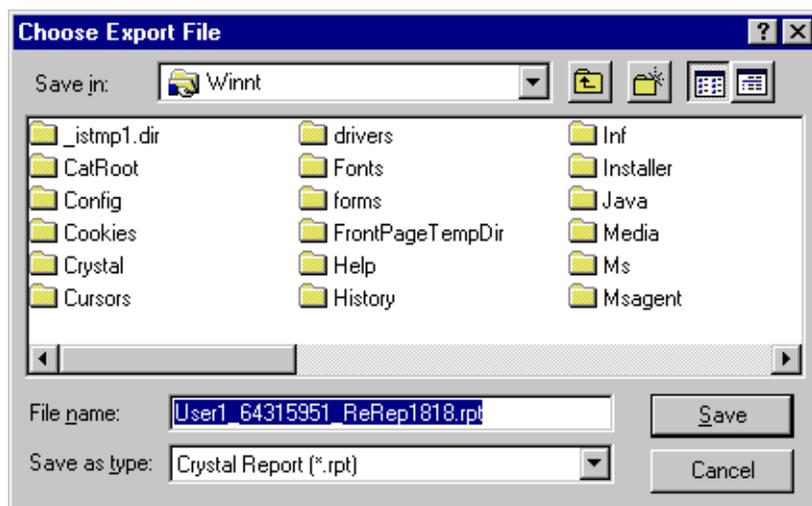


- In the **Separator** field, enter the character you want to use to separate fields in your export.
- In the **Delimiter** field, select the character you want to use to mark the beginning and end of an export field.

- Click **OK**. The Number and Date Format Dialog screen appears.



- Mark how you want numbers and dates formatted.
- Click **OK**. The Choose Export File screen appears.



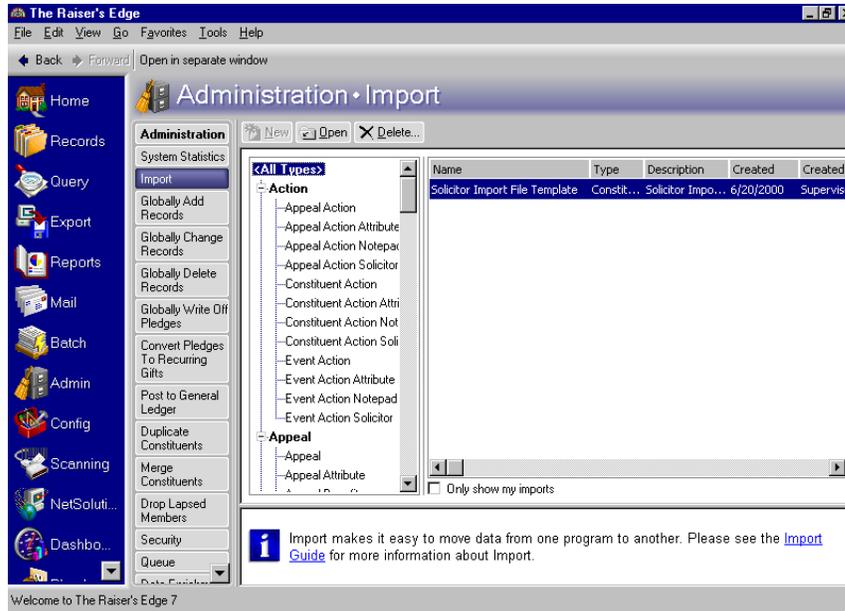
- In the **File name** field, enter a name for this file.
- In the **Save as type** field, select a format for this file.
- Click **Save**. A processing screen displays until the export is complete.
- To exit the Import parameter screen, from the menu bar, select **File, Close**.

## Sending an Import File by Email

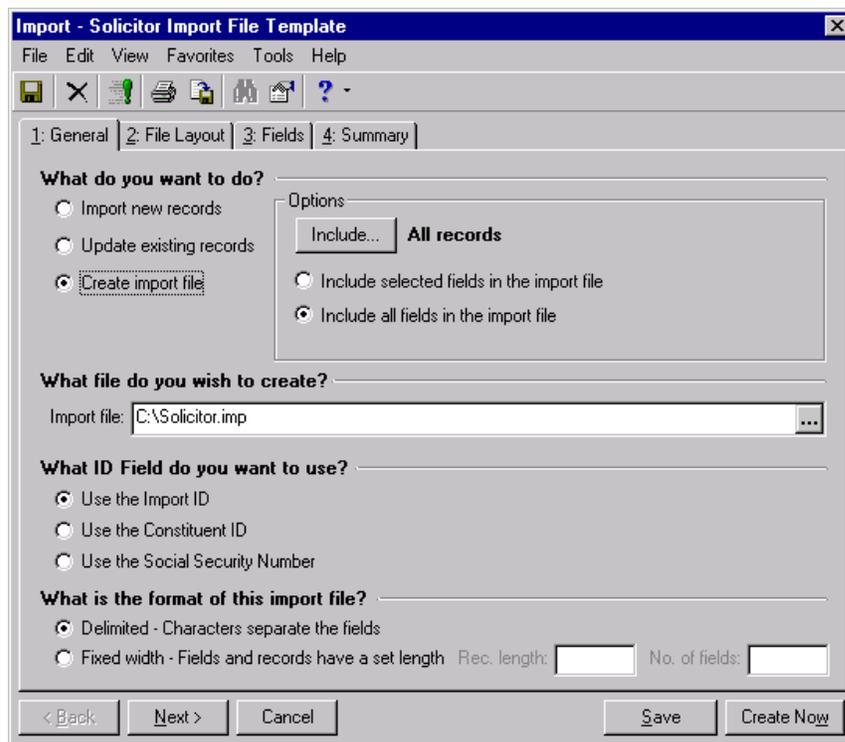
In **Import**, you can send via email any saved import parameter file. For example, if your organization uses electronic mail, and you want to share import parameter settings with other users, you can email the users your settings.

### ► Sending an import file by email

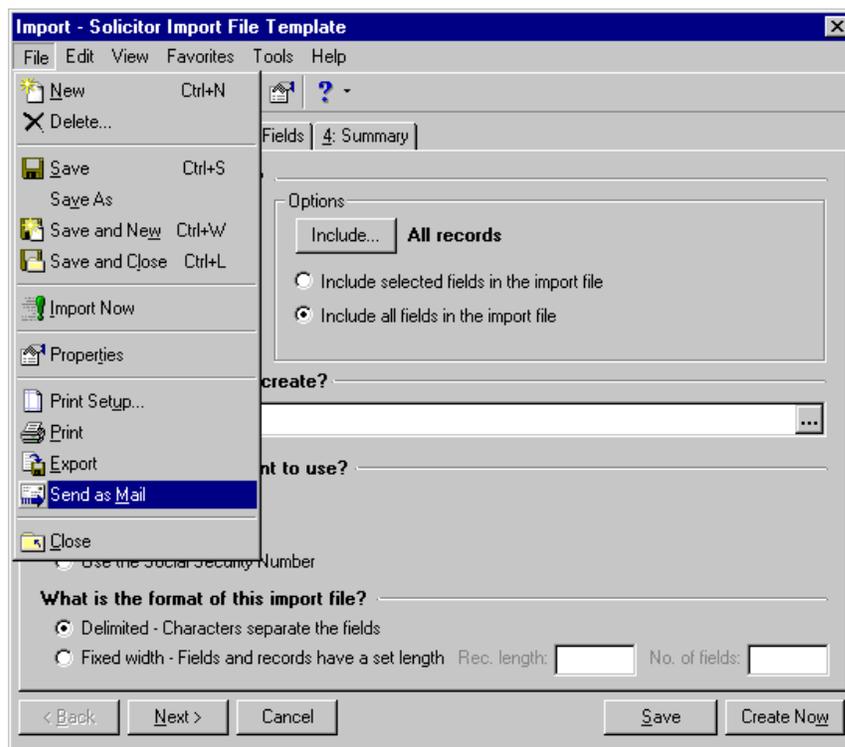
1. From the **Import** page, in the tree view on the left side of the screen, select the type of import record you want to send by email. All import files saved for the selected import type appear in the grid on the right side of your screen.



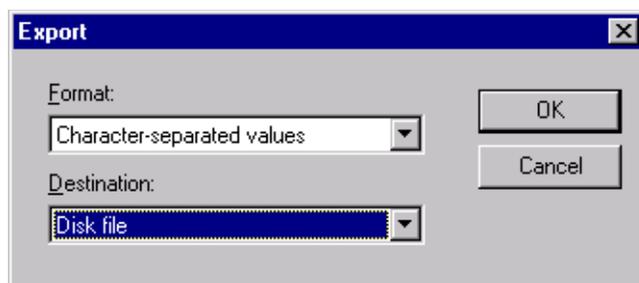
2. In the grid, select the import file you want to email and click **Open**. The import parameter screen appears.



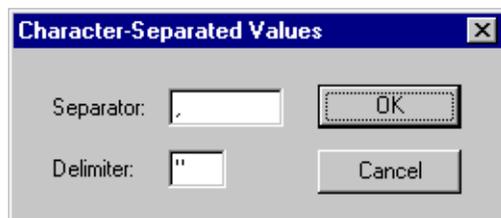
- From the menu bar, select **File, Send as Mail**.



The Export screen appears.

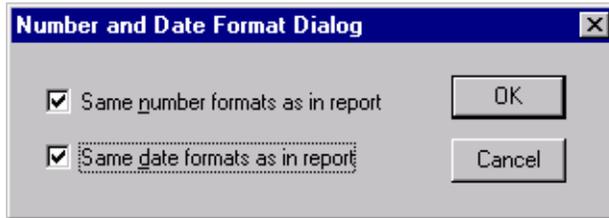


- In the **Format** field select how you want the email formatted. For more information on all of the **Format** options, please see the Export Format section in the Export chapter in the *Query & Export Guide*.
- In the **Destination** field, select the email application to which you want the import sent.
- Click **OK**. If you selected "Character-separated values" as your **Format**, the Character-Separated Values screen appears.

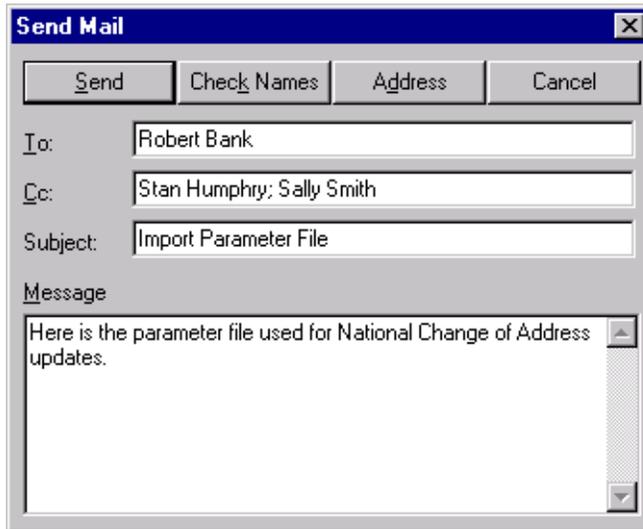


- In the **Separator** field, enter the character you want to use to separate fields in your export.
- In the **Delimiter** field, select the character you want to use to mark the beginning and end of an export field.

9. Click **OK**. The Number and Date Format Dialog screen appears.



10. Mark how you want numbers and dates formatted.  
11. Click **OK**. The Send Mail screen appears.



12. Enter to whom you want to send the import file and your message.  
13. To confirm the email addresses, click **Check Names**; to access your address book, click **Address**.

**Note:** An error message appears if the program could not deliver the email.

14. To send the email, click **Send**. You return to the Import parameter screen.  
15. To exit the Import parameter screen, select **File, Close**.

## Troubleshooting

**Warning:** Always back up your database before beginning a new import or update process. The only way to restore your database is from a backup.

This table lists issues that may occur during import along with possible solutions:

Problem	Possible Solution
Exception: Import ID is missing.	Import IDs are required whenever you update records or if you import new items that are linked to other records. Check the Fields tab to identify which import ID needs to be added to the import file.

Problem	Possible Solution
Exception: Import ID is missing. But you included an import ID in the import file.	Make certain you are using the correct import ID for that field.
Exception: The <unique ID> field is required to update existing records.	Make sure the ID selected in the <b>What ID field do you want to use</b> frame on the General tab is the same ID used in the import file.
Exception: Field value must be unique.	Mark <b>Update existing records</b> instead of <b>Import new records</b> on the General tab.
Exception: Record already exists.	If you are importing new records and the import file contains information about a record that already exists, an exception occurs. Either remove the information from the import file or mark <b>Update existing records</b> rather than <b>Import new records</b> on the General tab.
Exception: Record does not exist.	If you are updating records and the import file contains information about a record that does not already exist, an exception occurs. Either remove the information from the import file or mark <b>Import records not found as new records</b> on the General tab.
Exception: Invalid field value: field is Read-Only.	Read-Only fields cannot be updated; therefore, remove the field from the import file. You can remove a Read-Only field on the Fields tab by selecting it and clicking <b>Remove</b> . You do not have to remove the field from the import file itself.
Exception: Record does not exist.	Make sure you are using the correct import ID for that record
Exception: Invalid code table entry.	If the import file contains an item not found in the field's table and you did not to mark <b>Create new table entries</b> on the General tab, an exception occurs. If you are certain that you want to add a new entry, add the table entry in <i>Configuration</i> and then try the import again.
Error message: Bad file name or number.	Check to see if import file is open in another application. If so, close it and try to run the import again.
Data appears in the wrong fields after import.	Check extensions on the Fields tab.
Import is complete but no records are added or updated, and you receive no exceptions.	Unmark <b>Validate Process</b> on the General tab.
Import is complete but no records are updated, and you receive no exceptions.	Make sure the file listed in the <b>Import file</b> field on the General tab is the updated file, not the export file.
You have multiple fields in the import file but you want to update only one field.	On the Fields tab, map only the field you want to update. Only mapped fields are updated.

Problem	Possible Solution
The import creates duplicate records.	On the General tab, mark <b>Use duplicate criteria for new records</b> . The import process checks for duplicates. Make sure you have defined duplicate criteria in <i>Configuration</i> . You can use the <b>Duplicate Constituents</b> utility in <i>Administration</i> to identify any duplicates you created while importing.
You do not see the import type you need in the tree view on the Import Records page.	Make sure you have security rights for that record type or component. The import types appearing on the Import Records page are those for which you have security rights to view, add, edit, or delete.
You do not know a record's import ID.	Right-click on the record and select <b>Properties</b> . A window appears displaying the import ID and other information about the record.
Date or currency formatting in *.csv or *.txt files is lost after editing.	Make changes to the import file in <i>Excel</i> and save in *.xls file format. Then save the file again as *.csv or *.txt and import it back into <i>The Financial Edge</i> . This preserves the data formatting.
You want to import a field that has default values.	If you select to use a default set, you do not have to include fields with default values in the import file. Import adds default values automatically to each record in the import file. If you include a field in the import file, but also select to use a default set that includes a value for that field, the value in the import file overrides the default set and is assigned to the imported record. If the field in the import file is blank, then the default set value is used.

# Import Recurring Gifts



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The **Import Recurring Gifts** plug-in imports data for new recurring gifts from a single file; you do not have to create several different import files. This import creates a new recurring gift record and includes the associated payment schedule.

When you create your import file, if a constituent or financial institution included in the file does not already exist in *The Raiser's Edge* database and the file contains sufficient data to create the new record, the plug-in creates the constituent or financial institution record as well.

Also, the import file layout includes a field in which the donor's country may be specified, allowing the plug-in to process gifts from foreign countries. Any country-specific processing for a gift is based on the country specified in this field, rather than on the country in which the nonprofit organization is located.

Because **Import Recurring Gifts** works with a single import file, the amount of detail you can import for each gift, constituent, and financial institution is somewhat limited. You can import more detailed information using **Import**, but several import files may be needed. Use **Import Recurring Gifts** to import only basic information for new gifts, constituents, and financial institutions.

## Requirements

- The import file must fit a specific layout designed for *The Raiser's Edge*. For information about the file layout, see "Recurring Gifts Import File Layout" on page 89.

**Note:** You can add new gifts to existing constituent records, and you can use existing banks for routing payments, but you cannot update existing constituent and bank/financial institution records in **Import Recurring Gifts**.

- **Import Recurring Gifts** imports only Individual constituents, not organizations.
- You cannot update existing records using **Import Recurring Gifts**. You can only add new constituent, gift, and bank records.
- For constituent records, only the Preferred Address can be included in the import file.
- **Import Recurring Gifts** supports only the following payment schedule frequencies: Annually, Semi-Annually, Quarterly, Bimonthly, and Monthly.
- When a new recurring gift import is processed, *The Raiser's Edge* first checks for invalid data or data not satisfying the format required for this import. It then performs a duplicate check to identify records already on the *Raiser's Edge* database. The duplicate search is based on the criteria selected on the Business Rules page in *Configuration*. If a duplicate constituent is found where there is only a single matching record in the database, a new recurring gift is created for the existing constituent. Any invalid data or duplicate constituents with multiple matches in the database are treated as exceptions and are not imported.
- For any new gift records in the import file that do not have a duplicate constituent record already on the database, the program creates a new constituent record as well as the new recurring gift record. If there is not enough data to establish a new constituent record, an exception is generated.
- *The Raiser's Edge* performs a duplicate search to identify financial institutions in the import file that do NOT already exist in the *Raiser's Edge* database. The criteria for duplicates is based on the Bank + Branch + Sort Code (Transit/Routing Number, BSB Number, Bank Number, or Institution Number) for each institution. If any financial institution in the import file does not have a matching record in *The Raiser's Edge*, a new financial institution record is created in *Raiser's Edge* based on the data in the import file. If the financial institution already exists, the program applies the gift against the existing institution, using the account number or credit card number included in the import file.

# Importing Recurring Gifts

The **Import Recurring Gifts** plug-in makes it easy to import basic recurring gifts and payment schedules. You can import any file satisfying the import file layout rules (see “Recurring Gifts Import File Layout” on page 89), including files supplied by third-party fundraising organizations.

## ▶ Importing recurring gifts

1. Select **Plug-Ins** on the Raiser’s Edge bar. The Plug-Ins screen appears.



2. Click **Import Recurring Gifts**. The Import Recurring Gifts screen appears.

3. In the **What do you want to do?** frame, you can choose one of two options:
  - **Import recurring gifts** is the default option. If selected, *The Raiser's Edge* imports data from the designated file when you click the **Import Now** button at the bottom of the screen.
  - **Validate recurring gift import file** checks the designated file for any invalid data or formats.
4. Under **What file do you want to import?**, in the **Import file** field, you must enter the path and file name of the import file to be processed. This field is required. You can enter the information directly or click the ellipses to open the Import Recurring Gifts File screen.

Browse to the import file, and click **Open**. You return to the Import Recurring Gifts screen. The import file name appears in the **Import file** field.

5. Under **Assign this constituent code to new constituents**, select the **Constituent code** you want assigned any new constituents included in the import file. This information is stored in the **Constituent Codes** grid on the Bio 2 tab of the constituent record. Depending the data entry protocol you established in *Configuration*, a constituent code may be required for new records. If it is a required field and it is not included in your import file, an exception occurs and the information is not imported.
6. In the **Date From** field, you can enter a starting date for the constituent code. For example, if you select "Member" as your **Constituent Code**, and you want to complete the **Date From** column in the **Constituent Code** grid on the Bio 2 tab of the constituent record, enter the date information here. If you enter **Date From** information, the **Constituent Code** field is required.
7. Under **Assign this addressee and salutation to new constituents**, select the **Primary addressee** you want assigned any new constituent included in the import file. You can also select the Primary salutation for any new constituent records. Depending the data entry protocol you established in *Configuration*, an addressee/salutation may be required for new records. If it is a required field and it is not included in your import file, an exception occurs and the information is not imported.
8. The **Import options** frame includes a number of options you can choose to include in the importing process. The **Create <Constituent/Gift> query of records imported** and **Create exception file of records not imported** checkboxes do not activate if you select **Validate recurring gift import file** in the **What do you want to do?** frame.
  - Mark **Create <Constituent/Gift> query of records imported**, and you can specify the type of query you want created when the import is processed. If the checkbox is checked, either a Constituent Query or a Gift Query of the records successfully imported from the import file is generated. If the checkbox is not marked, no query is created.
  - Mark **Create exception file of records not imported** to generate an exception file when the import is processed. This is a comma-delimited file, listing all records not successfully imported. If you mark this checkbox, in the field you must enter a path and file name for the exception file. If the checkbox is not marked, no exception file is created
  - Mark **Create exception report** to create an exception report. You then must select a form: **Preview**, to view the report on the screen before printing, or **Print**, to automatically print the exception report when the import process is complete.

- Mark **Create control report** to create a control report. You then must select a form: **Preview**, to view the report on the screen before printing, or **Print**, to automatically print the report when the import process is complete.

**Import Recurring Gifts**

**What do you want to do?**

Import recurring gifts  
 Validate recurring gift import file

**What file do you want to import?**

Import file: C:\Files\Import\_Files\recurring\_gifts\imprecgift.csv

**Assign this constituent code to new constituents**

Constituent code: Member  
Date from: 03/09/2004

**Assign these addressee/salutations to new constituents**

Primary addressee: Mrs and Mr Margaret A Adams MD  
Primary salutation: Mr and Mrs Smith

**Import options**

Create Constituent query of records imported  
 Create exception file of records not imported C:\Files\Import\_Files\recurring\_gift ...  
 Create exception report  Preview  Print  
 Create control report  Preview  Print

Import Now Cancel

9. If in the **What do you want to do?** frame you selected **Import recurring gifts**, click **Import Now** to start the importing process. The program checks for invalid data and duplicate records, and creates new records where applicable.

If in the **What do you want to do?** frame you selected **Validate recurring gift import file**, click **Validate Now**. The program validates the data in your import file.

10. If you mark **Create <Constituent/Gift> query of records imported**, in the **Import options** frame, the Save Static Query screen appears.

**Save Static Query**

Query name: Recurring Gifts  
Description: Constituents imported or updated though import recurring gifts on 08/05/2004

Query format: Static Query Type: Constituent

Other users may execute this query  
 Other users may modify this query

Created From: Import recurring gifts

Save Cancel

Enter a **Query name**. This is a required field. The name is then included in the list of available queries on the Query page. You can also enter a **Description** and allow other users to execute and/or modify the query.

11. Click **Save**. The import or validation is processed. When the process is complete, a confirmation screen appears.



**Note:** The **Preview Exception Report** button is disabled if you marked **Create exception report** on the Import Recurring Gifts screen. If you did not mark this checkbox, the button is activated, allowing you to view the exception report for the import file.

Click **Close**. The control report preview and/or exception report preview displays or the applicable reports are sent to the printer, depending on which checkboxes you marked on the Import Recurring Gifts screen.

12. From the report screen, you can print the report or click the “X” in the upper right corner to close the report and return to the Plug-Ins screen.

## Recurring Gifts Import File Layout

All import files for Recurring Gift imports must use the following layout.

<b>Last Name</b>	Surname for UK, AU, & NZ
<b>First Name</b>	
<b>Middle Name</b>	
<b>Title 1</b>	If the entry does not already exist, it is added automatically as a new table entry
<b>Suffix 1</b>	If the entry does not already exist, it is added automatically as a new table entry
<b>Constituent ID</b>	Must be unique; is not used in Duplicate Search routine unless it is part of the defined duplicate criteria
<b>Country</b>	Country-specific processing is based on this field's value

<b>Address Line 1</b>	Is concatenated with other address lines
<b>Address Line 2</b>	Is concatenated with other address lines
<b>Address Line 3</b>	Is concatenated with other address lines
<b>City</b>	Suburb for AU
<b>State</b>	County for UK / Suburb for NZ / Province for CA – Use 2-Character postal abbreviation for US and CA; all others are table lookups
<b>Zip</b>	Postcode for UK & AU / Postal Code for CA / Post Code for NZ
<b>Birth date</b>	
<b>Phone Number</b>	
<b>Phone Type</b>	
<b>Phone Number 2</b>	
<b>Phone Type 2</b>	
<b>Phone Number3</b>	
<b>Phone Type3</b>	
<b>Tax Declaration Made</b>	Date field - UK only
<b>Tax Declaration Starts</b>	Date field - UK only
<b>Tax Declaration Ends</b>	Date field - UK only
<b>Tax Declaration Indicator</b>	UK only
<b>Confirmation Sent</b>	Date field - UK only
<b>Confirmation Returned</b>	Date field - UK only
<b>Pays Tax</b>	UK only
<b>Tax Status</b>	UK only
<b>Tax Declaration</b>	UK only
<b>Constituent Attribute Category</b>	
<b>Constituent Attribute Comment</b>	
<b>Constituent Attribute Date</b>	

<b>Constituent Attribute Description</b>	
<b>Constituent Attribute Category 2</b>	
<b>Constituent Attribute Comment 2</b>	
<b>Constituent Attribute Date 2</b>	
<b>Constituent Attribute Description 2</b>	
<b>Constituent Attribute Category 3</b>	
<b>Constituent Attribute Comment 3</b>	
<b>Constituent Attribute Date 3</b>	
<b>Constituent Attribute Description 3</b>	
<b>Sort Code</b>	Sort Code for UK / Transit/Routing No. for US / BSB No. for AU / Institution No. for CA / Bank No. for NZ
<b>Bank Name</b>	When a bank is added, it will be marked as 'primary' if a primary bank for that constituent does not already exist.
<b>Branch Name</b>	
<b>Address Line 1</b>	
<b>Address Line 2</b>	
<b>Address Line 3</b>	
<b>City</b>	Suburb for AU
<b>State</b>	County for UK / Suburb for NZ / Province for CA – Use 2-Character postal abbreviation for US and CA. All others are table lookups.
<b>ZIP</b>	Postcode for UK & AU / Postal Code for CA / Post Code for NZ
<b>Account Number</b>	
<b>Account Name</b>	Only used for UK and AU.
<b>Direct debit reference</b>	

<b>Direct debit reference date</b>	
<b>Credit Card Type</b>	If the entry does not already exist, it is added automatically as a new table entry
<b>Credit Card Number</b>	
<b>Credit Card Expires On</b>	
<b>Credit Card Name</b>	
<b>Gift ID</b>	
<b>Gift Amount</b>	
<b>Gift Date</b>	
<b>Gift Fund</b>	If the Fund does not already exist, it is added automatically as a new Fund
<b>Gift Campaign</b>	If the Campaign does not already exist, it is added automatically as a new Campaign
<b>Gift Appeal</b>	If the Appeal does not already exist, it is added automatically as a new Appeal
<b>Gift Package</b>	If the Package does not already exist, it is added automatically as a new Package
<b>Gift Letter Code</b>	
<b>Gift Reference</b>	
<b>Gift Frequency</b>	Annually, Semi-Annually, Quarterly, Bimonthly, Monthly are supported
<b>Gift Schedule Start On</b>	Date First Pay
<b>Gift Schedule End On</b>	If Recurring gift is not open-ended
<b>DDI Source</b>	UK only
<b>DDI Source Date</b>	UK only
<b>Instruction Type to Send</b>	UK only
<b>Send Instruction</b>	UK only
<b>Gift Attribute Category</b>	
<b>Gift Attribute Comment</b>	
<b>Gift Attribute Date</b>	

<b>Gift Attribute Description</b>	
<b>Gift Attribute Category 2</b>	
<b>Gift Attribute Comment 2</b>	
<b>Gift Attribute Date 2</b>	
<b>Gift Attribute Description 2</b>	
<b>Gift Attribute Category 3</b>	
<b>Gift Attribute Comment 3</b>	
<b>Gift Attribute Date 3</b>	
<b>Gift Attribute Description 3</b>	
<b>Standing Order Indicator</b>	“Yes” means Pay Method = Standing Order
<b>Standing Order Sent Indicator</b>	“Yes” means Standing Order Sent
<b>Standing Order Sent On</b>	Date field; UK and NZ only

## Recurring Gifts Import File Layout Notes

- All table entries are added on the fly if a match cannot be found. A match is made by checking the long description and then the short description, if the table has a short description.
- If Bank information is specified, then no credit card information is needed. The gift is created as a direct debit payment type.
- If no bank information is specified, then credit card information should be specified.
- All gifts have the EFT checkbox checked.



# Import Tables



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# Import Layout Tables

Import tables provide you with the information necessary to import records with headers. All **Available Fields** in *The Raiser's Edge* are listed in this section, arranged based on import types. Next to these fields, the **Import ID** you must provide with the header is listed. The tables also offer information on **Allowed Values** and **Notes**.

Remember, all **Import IDs** must be unique within their own type, and no CR-LFs are allowed inside import fields. In memo and text fields, a CR-LF is represented by /n. Memo fields contain text with a maximum length of 64,000 characters; text fields may contain up to 255 characters.

For table lookup fields, punctuation is important but leading and trailing spaces are not (e.g., "Mr." <> "Mr", "MR." = "MR."). Please note that although capitalization does not matter when adding to code tables, the fields are put into *The Raiser's Edge* exactly as they appear in the first occurrence in the import file. The order of fields within an import file does not matter. However, you may find it easier to manage your import file if related fields are grouped together.

Multiples of the same record type must have a two digit extension at the end (e.g., 01, 02, 03, ... 99). There is an option to add **Table Lookup** fields not currently in the table. However, some tables do not allow additions, such as the **Salutation** table and **Attribute** table. The **Notes** column in the field list specifies if values can be added. Any fields left blank are ignored. Any field set as "required" in *Configuration* must be present in the import file when importing new records. Records that do not have a value for the required field generate an exception.

Some fields are used to link another constituent in your database with the current record. These link fields contain the **Import ID** of the constituent record to which you are linking. For instance, if Joe Doe's wife, Jane Doe, is also a constituent in your database, put Jane Doe's **Import ID** into the SPLink import field for Joe Doe's record. When linking to a campaign, fund, appeal, or event record, use the campaign, fund, appeal, or event ID, **not** the import ID in the link field. Fill in link fields only if you are linking to another record.

## Import Checklist

When importing constituent records, remember the following.

**Warning:** Confirm you have a good backup of your database before running any imports/updates.

- If a constituent is flagged to normally give gifts anonymously, any gift being imported will NOT automatically be flagged as anonymous unless specified in the import file.
- Maiden name**, **Known name**, and **Spouse name** are automatically written to the list of aliases for the constituent based on the setting in **Business Rules**.
- Import** automatically generates the Constituent ID based on the parameters specified in **Business Rules**.
- If the constituent has no address, the first address imported for that constituent is flagged as the Preferred address. If the constituent has addresses but you are importing a new one flagged as the Preferred address, the Preferred flag is removed from the previously existing address. If several addresses for the same constituent are imported with the Preferred flag on, the last one in the import file is set to the Preferred Address.
- If a subsidiary of a parent corporation is being imported, the **Number of subsidiaries** field on the Bio 1 tab of the parent corporation's constituent record will not be automatically updated.
- If importing an address with a country that did not exist before, the formatting for that country defaults to the country that is stamped in the database.
- If an attribute is marked in *Configuration* to allow only one per record, an exception is generated if more than one attribute of that category is in the import file for a constituent, or if an attribute of that category already exists on a constituent's record.
- Individuals and organizations can be imported in the constituent import file. Fields pertaining only to individuals (**Birth date**, **Birthplace**) are ignored for organizations and vice versa.
- Constituent information is updated through links. For instance, if you run a Constituent Import and include name, maiden name, and title information for a relationship who is also a constituent, the new relationship information overwrites the existing constituent information. However, when both parties in a relationship are also constituents, you cannot update the biographical information (everything located in the **Biographical** section of the Bio 1 tab of an individual constituent record), for one or both of those constituents using an Individual Relationship Import. You must use a Constituent Import.
- When importing gift records, remember the following:
  - When a pledge is imported into **The Raiser's Edge**, if no installment information is entered, the program creates one installment using "Single Payment" as the frequency, the system date as the starting date, one as the number of payments, and the pledge amount as the installment amount. If partial installment schedule information is entered, the record is not imported and an exception is generated stating "Insufficient installment information".
  - All matching gift pledges have one installment created by default.
- There is one import file type for importing/updating installments - Installments. You can choose to **Import new records** or **Update existing records** using this import type. The total of all installments for a pledge must equal the amount of the pledge. If not, the program generates an exception.
- Imported installments must have "No" payments applied to the pledge, because importing the new installments deletes all existing installments for the pledge.
- Updating installments does not update any installment with a payment applied. However, any existing installments with no payments applied are updated.
- All pledge payments imported should be linked to the pledge being paid not the installment being paid. Installments are paid in chronological order.



# Action Imports

Using **Import**, you can import new actions into constituent or event records in *The Raiser's Edge*, update existing actions, or create an import file of action information.

The list below shows the available import types for importing actions. Each of these is a separate import type. The tables below the list display the fields available for each import type.

- Appeal Action Fields
- Appeal Action Attribute Fields
- Appeal Action Notepad Fields
- Appeal Action Solicitor Fields
- Constituent Action
- Constituent Action Attribute (also available as part of a Constituent Action import)
- Constituent Action Notepad Fields
- Constituent Action Solicitor
- Event Action
- Event Action Attribute (also available as part of an Event Action import)
- Event Action Notepad Fields
- Event Action Solicitor

## Appeal Action Fields

The Appeal Action Import is used to update or create action information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Date	ACDate	Required to add new and create	Date	
Action Import ID	ACImpID	Required to update existing action and create	Text up to 20 characters	
Campaign	ACCampaign		Campaign ID or Description of existing Campaign	
Category	ACCat		Phone Call, Meeting, Mailing, Email, Task/Other	Defaults to Phone Call
Completed	ACCompleted		Yes, No, True, False, Y, N, T, F	Requires completed on date
Completed Date	ACCompletedDate		Date	Visible on record if Completed = Yes, True, Y, T
Email	ACEmail		Text up to 100 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
End Time	ACEndTime		Time	End time must be later than start time if start time is entered
Appeal ID	AppealID	* See note at end of table		
Fund	ACFund		FundID or Description of existing fund	
Letter	ACLetter		User-defined code table values	New letter can be added to table during import if checkbox is on
Location	ACLocation		User-defined code table values	New location can be added to table during import if checkbox is on
Notes	ACNotes		Memo	
Phone	ACPhone		Text up to 100 characters	
Priority	ACPriority		Low, Normal, High	Default = Normal
Start Time	ACStartTime		Time	Start time must be earlier than end time if end time is entered
Status	ACStatus		User-defined code table values	New status can be added to table during import if checkbox is on
Action Type	ACType		User-defined code table values	New type can be added to table during import if checkbox is on

\*This field is required to add new actions. When updating an existing action, an exception is generated if the appeal linked does not match the existing action's appeal.

## Appeal Action Attribute Fields

The Appeal Action Attribute Import is used to update or create action attribute information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	ACImpID	Required to add new, update existing, and create	Import ID of existing Action	Link to Action

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	ACAttrImpID	Required to update existing and create	Text up to 20 characters	Import ID of action attribute
Category	ACAttrCat	Required to add new and create	User-defined table values	
Comments	ACAttrCom		Text up to 50 characters	
Action Attribute Date	ACAttrDate		Date	
Description	ACAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

## Appeal Action Notepad Fields

The Appeal Action Notepad Import is used to update or add notes to appeal action records or create an import file containing appeal action note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	AALink	Required to add new, update existing, and create	Import ID of existing Action	Link to Action
Author	AANoteAuth			
Note Date	AANoteDate	Required to create import file		
Description	AANoteDesc			
Notepad Import ID	AANoteImpID	Required to create import file		
Notes	AANoteNotes			
Title	AANoteTitle			
Note Type	AANoteType	Required to create import file		

## Appeal Action Solicitor Fields

The Appeal Action Solicitor Import is used to create solicitor action information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	ACImpID	Required to add new and create	Import ID of existing Action	Link to Action

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Solicitor Import ID	ACSollImpID	Required to add new and create	Import ID of Constituent who is a solicitor	This does not have to be a solicitor already assigned to the constituent, but it must be an existing solicitor in the database. This field can be indexed to allow importing of multiple solicitors assigned to this action.

## Constituent Action Fields

The Constituent Action Import is used to update or create action information on a constituent record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Date	ACDate	Required to import new	Date	
Action Import ID	ACImpID	Required to update existing action	Text up to 20 characters	
Alert Title	ACAlertTitle		Text	
Appeal	ACAppeal		Appeal ID or Description of existing Appeal	
Campaign	ACCampaign		Campaign ID or Description of existing Campaign	
Category	ACCat		Phone Call, Meeting, Mailing, Email, Task/Other	Defaults to Phone Call if left blank
Completed	ACComplete		Yes, No, True, False, Y, N, T, F	Require "Completed date" if value = Yes, True, Y, T
Completed Date	ACCompleteDate	Required when adding new if "Completed" = Yes, True, Y, T	Date	Visible only on action record if "Completed" = Yes, True, Y, T
Constituent ID	ConsID	* See note at end of table	Text up to 20 characters	
Constituent Import ID	ImportID	* See note at end of table	Text up to 20 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table	Text up to 20 characters	<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Contact	ACContact		Import ID of Relationship (for contact)	Only for Organizations; Link to Contact (Relationship must be marked as contact)
Delivery Method	ACDeliveryMethod		Text	
Email	ACEmail		Text up to 100 characters	
End Time	ACEndTime		Time	End time must be later than start time if start time is entered
Fund	ACFund		Fund ID or Description of existing fund	
Issue	ACIssue		Text	
Letter	ACLetter		User-defined code table values	New letter can be added to table during import if checkbox is on
Location	ACLocation		User-defined code table values	New location can be added to table during import if checkbox is on
Message ID	ACMessageID			
Notes	ACNotes		Memo	
Phone	ACPhone		Text up to 100 characters	
Priority	ACPriority		Low, Normal, High	Default = Normal
Proposal	ProposalImpID	** See note at end of table	Import ID of existing Proposal for this constituent	Creates exception if proposal does not belong to same constituent as action
Recipient Nam	ACRecipient		Text	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Start Time	ACStartTime		Time	Start time must be earlier than end time if end time is entered
Status	ACStatus		User-defined code table values	New status can be added to table during import if checkbox is on
Action Type	ACType		User-defined code table values	New type can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

\*\* This field is available only if you have *Prospect Research Management*.

## Constituent Action Attribute Fields

The Constituent Action Attribute Import is used to update or create action attribute information on a constituent record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	ACImpID	* See note at end of table	Import ID of existing Action	Link to Action; Creates exception if action does not match action of attribute being updated
Attribute Import ID	ACAttrImpID	Required to update existing action attribute	Text up to 20 characters	Import ID of action attribute
Category	ACAttrCat	Required to add new	User-defined table values	
Comments	ACAttrCom		Text up to 50 characters	
Attribute Date	ACAttrDate		Date	
Description	ACAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

\*This field is available for constituent action attribute imports and event action attribute imports. If available, this field is required to add new records.

## Constituent Action Notepad Fields

The Constituent Action Notepad Import is used to update or add notes to constituent action records or create an import file containing constituent action note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	CALink	Required to add new, update existing, and create	Import ID of existing Action	Link to Action
Author	CANoteAuth			
Constituent Action Notepad Date	CANoteDate	Required to create import file		
Description	CANoteDesc			
Notepad Import ID	CANoteImpID	Required to create import file		
Notes	CANoteNotes			
Title	CANoteTitle			
Constituent Action Notepad Type	CANoteType	Required to create import file		

## Constituent Action Solicitor Fields

The Constituent Action Solicitor Import is used to update or create solicitor action information on a constituent record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Solicitor Import ID	ACSollImpID	Required	Import ID of Constituent who is a solicitor	This does not have to be a solicitor already assigned to the constituent, but it must be an existing solicitor in the database. This field can be indexed to allow importing of multiple solicitors assigned to this action.
Action Import ID	ACImpID	Required	Import ID of existing Action	Link to Action

**Note:** This import type can be used to import solicitors for an action. Solicitors already on the action record remain and cannot be changed or deleted through **Import**.

## Event Action Fields

The Event Action Import is used to update or create action information on an event record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Date	ACDate	Required to add new	Date	
Action Import ID	ACImpID	Required to update existing action	Text up to 20 characters	
Campaign	ACCampaign		Campaign ID or Description of existing Campaign	
Category	ACCat		Phone Call, Meeting, Mailing, Email, Task/Other	Defaults to Phone Call
Completed	ACComplete		Yes, No, True, False, Y, N, T, F	Requires completed on date
Completed Date	ACCompleteDate		Date	Visible on record if Completed = Yes, True, Y, T
Email	ACEmail		Text up to 100 characters	
End Time	ACEndTime		Time	End time must be later than start time if start time is entered
Event ID	EventID	* See note at end of table		
Fund	ACFund		FundID or Description of existing fund	
Letter	ACLetter		User-defined code table values	New letter can be added to table during import if checkbox is on
Location	ACLocation		User-defined code table values	New location can be added to table during import if checkbox is on
Notes	ACNotes		Memo	
Phone	ACPhone		Text up to 100 characters	
Priority	ACPriority		Low, Normal, High	Default = Normal

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Start Time	ACStartTime		Time	Start time must be earlier than end time if end time is entered
Status	ACStatus		User-defined code table values	New status can be added to table during import if checkbox is on
Action Type	ACType		User-defined code table values	New type can be added to table during import if checkbox is on

\*This field is required to add new actions. When updating an existing action, an exception is generated if the event linked does not match the existing action's event.

## Event Action AttributeFields

The Event Action Attribute Import is used to update or create action attribute information on an event record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	ACImpID	Required	Import ID of existing Action	Link to Action
Attribute Import ID	ACAttrImpID	Required to update existing action attribute	Text up to 20 characters	Import ID of action attribute
Category	ACAttrCat	Required to add new	User-defined table values	
Comments	ACAttrCom		Text up to 50 characters	
Attribute Date	ACAttrDate		Date	
Description	ACAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

## Event Action Notepad Fields

The Event Action Notepad Import is used to update or add notes in event action records or create an import file containing event action note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	EALink	Required to add new, update existing, and create	Import ID of existing Action	Link to Action
Author	EANoteAuth			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Note Date	EANoteDate	Required to create import file		
Description	EANoteDesc			
Notepad Import ID	EANoteImpID	Required to create import file		
Notes	EANoteNotes			
Title	EANoteTitle			
Note Type	EANoteType	Required to create import file		

## Event Action Solicitor Fields

The Event Action Solicitor Import is used to update or create solicitor action information on an event record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Action Import ID	ACImpID	Yes	Import ID of existing Action	Link to Action
Solicitor Import ID	ACSollImpID	Yes	Import ID of Constituent who is a solicitor	This does not have to be a solicitor already assigned to the constituent, but it must be an existing solicitor in the database. This field can be indexed to allow importing of multiple solicitors assigned to this action.

## Appeal Imports

Using **Import**, you can import new appeals into *The Raiser's Edge*, update existing appeal records, or create an import file of appeal information.

The list below shows the available import types for importing appeals and packages. Each of these is a separate import type. The tables below the list show the fields that display for each import type.

**Note:** The appeal import type does not import appeals to the Appeals tab in a constituent record. If you want the appeal information imported to the Appeals tab of a constituent record, you must run a constituent import.

- Appeal
- Appeal Attribute (also available as part of an Appeal import)
- Appeal Benefit
- Appeal Campaign

- Appeal Expense
- Appeal Fund
- Appeal Package
- Package Attribute (also available as part of a Package import)
- Package Benefit

## Appeal Fields

The Appeal Import is used to update or create appeal records in *The Raiser's Edge* or to create an import file containing appeal information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	AppealID	Required to add new <b>and</b> update existing	Unique name up to 20 characters	If the ID already exists, this updates that Appeal
Appeal Notes	APNotes		Text	Memo field
Benefit Notes	APBenNotes		Text	Memo field
Category	APCat		User-defined table values	New category can be added to table during import if checkbox is on
Default Campaign	APDefCamp		Campaign ID	ID of an existing Campaign
Default Fund	APDefFund		Fund ID	ID of an existing Fund
Default Gift Amount	APGiftAmt		Currency up to \$1,000,000,000.00	
Description	APDesc	Required to add new	Unique text up to 100 characters	
End Date	APEndDate		Date must be greater than start date if start date is present	
Include Benefit Notes on Receipt	APIncludeNotes		Yes, No, True, False, Y, N, T, F	Default = No
Is inactive	APInactive		Yes, No, True, False, Y, N, T, F	Default = No
Limit Campaigns	APLimitCamp		Yes, No, True, False, Y, N, T, F	Limit gift entry to associated campaigns only; Default = No
Limit Funds	APLimitFund		Yes, No, True, False, Y, N, T, F	Limit gift entry to associated funds only; Default = No

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Number Solicited	APNumSolicited		Numeric up to 1,000,000,000 (>=0)	Default = 0
Overall Goal	APGoal		Currency up to \$1,000,000,000.00	
Start Date	APStartDate		Date must be before end date if end date is present	

## Appeal Attribute Fields

The Appeal Attribute Import is used to update or create appeal attribute information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal Import ID	AppealID	* See note at end of table	ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of attribute being updated
Attribute Import ID	APAttrImpID	Required to update existing	Text up to 20 characters	Import ID of attribute
Category	APAttrCat	Required to add new	User-defined table values	
Comments	APAttrCom		Text up to 50 characters	
Gift Date	APAttrDate		Date	
Description	APAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

\*This field is available for appeal attribute imports. If available, this field is required to add new **and** update existing records.

## Appeal Benefit Fields

The Appeal Benefit Import is used to update or create appeal benefit information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	AppealID	Required to add new	ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of benefit being updated
Benefit	APBenBen	Required to add new benefit	User-defined table values	New benefit can be added to table during import if checkbox is on
Benefit Import ID	APBenImpID	Required to update existing benefit	Import ID of existing Appeal Benefit	
Comments	APBenCom		Text up to 255 characters	
Count	APBenCount		Numeric up to 999 (>=0)	Default = 0
Sent	APBenSent		Date	
Total Benefit Value	APBenTotVal		Currency up to \$1,000,000,000.00	
Unit Cost	APBenUnitCost		Currency up to \$1,000,000,000.00	Defaults to \$0

## Appeal Campaign Fields

The Appeal Campaign Import is used to create campaign information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal	AppealID	Required	ID of existing Appeal	Link to Appeal
Campaign	APCampID	Required	ID of existing campaign that is to be associated with the Appeal	

**Note:** This import type can only be used to import existing campaigns newly associated with an appeal. Campaigns already associated with this appeal remain and cannot be changed or deleted through **Import**.

## Appeal Expense Fields

The Appeal Expense Import is used to update or create appeal expense information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	APExpAmt	Required to add new	Currency up to \$1,000,000,000.00	
Appeal	AppealID	Required to add new	ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of expense being updated
Budgeted	APExpBud		Currency up to \$1,000,000,000.00	
Comments	APExpCom		Text up to 30 characters	
Gift Date	APExpDate		Date	
Expense	APExpExp	Required to add new	User-defined table values	New expense can be added to table during import if checkbox is on
Expense Import ID	APExpImpID	Required to update existing		
Package ID	PackageID		ID of existing package	Link to package; Must be existing package for this appeal.

## Appeal Fund Fields

The Appeal Fund Import is used to create fund information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal	AppealID	Required	ID of existing Appeal	Link to Appeal
Fund ID	APFundID	Required	ID of existing fund that is to be associated with the Appeal	

**Note:** This import type is used to import existing funds newly associated with an appeal. Funds already associated with this appeal remain and cannot be changed or deleted through **Import**.

## Appeal Package Fields

The Appeal Package Import is used to update or create appeal package information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal	AppealID	Required to add new	ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of package being updated
Benefit Notes	PKBenNotes		memo	
Category	PKCat		User-defined table values	New category can be added during import if checkbox is on
Default Gift Amount	PKGiftAmt		Currency up to \$1,000,000,000.00	Default = 0
Description	PKDesc	Required to add new	Text up to 100 characters	
End Date	PKEndDate		Date	
Include Benefit Notes on Receipt	PKIncludeNotes		Yes, No, True, False, Y, N, T, F	Default = No
Is Inactive	PKInactive		Yes, No, True, False, Y, N, T, F	Default = No
Notes	PKNotes		Currency	
Number Solicited	PKNumSolicited		Numeric up to 1,000,000,000	Default = 0
Overall Goal	PKGoal			
Package ID	PackageID	Required to add new	Text up to 20 characters	
Start Date	PKStartDate		Date	

## Package Attribute Fields

The Package Attribute Import is used to update or create package attribute information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	AppealID	* See note at end of table	ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of package attribute being updated

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	PKAttrImpID	Required to update existing attribute	Text up to 20 characters	Import ID of attribute
Category	PKAttrCat	Required to add new	User-defined table values	
Comments	PKAttrCom		Text up to 50 characters	
Gift Date	PKAttrDate		Date	
Description	PKAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Package ID	PackageID	* See note at end of table	ID of existing Package	Link to a Package; Must be existing package for this appeal

\*This field is available only for package attribute imports. If available, this field is required to add new records.

## Package Benefit Fields

The Package Benefit Import is used to update or create package benefit information on an appeal record or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	AppealID	Required to add new <b>and</b> update existing	Import ID of existing Appeal	Link to an Appeal; Creates exception if appeal does not match appeal of package benefit being updated
Benefit	PKBenBen	Required to add new benefit	User-defined table values	New benefit can be added to table during import if checkbox is on
Benefit Import ID	PKBenImpID	Required to update existing benefit	Import ID of existing Package Benefit	
Comments	PKBenCom		Text up to 255 characters	
Count	PKBenCount		Numeric up to 999	Defaults to 0
Package ID	PackageID	Required to add new	Import ID of existing Package	Link to a Package; Must be existing package for this appeal
Sent	PKBenSent		Date	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Total Benefit Value	PKBenTotVal		Currency	Although this field does calculate when unit cost and count data are entered in <i>The Raiser's Edge</i> , it is NOT calculated when imported.
Unit Cost	PKBenUnitCost		Currency up to \$1,000,000,000.00	Defaults to \$0

## Bank/Financial Institution Imports

Using **Import**, you can import new bank information into *The Raiser's Edge*, update existing bank information, or create an import file of bank information.

The table below shows the available import types for importing banks/financial institutions. Each of these is a separate import type. The tables below the list show the fields that display for each import type.

- Bank Phone Numbers
- Bank/Financial Information

## Bank/Financial Institution Phone Fields

The Bank/Financial Institution Phone Import is used to update or create bank telephone information on a configuration level or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Bank Import ID	BAImpID	Required to add new	Text up to 20 characters	Link to Bank/Financial Institution; Creates exception if bank does not match bank of phone being updated
Phone Import ID	BAPhoneImpID	Required to update existing	Text up to 20 characters	
Phone Number	BAPhoneNum	Required to add new	Text up to 100 characters	
Phone Type	BAPhoneType	Required to add new	User-defined table values	New Type can be added to table during import if checkbox is on

## Bank/Financial Institution Fields

The Bank/Financial Institution Import is used to update or create bank information on a configuration level or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Abbreviation	BAAbbr			Aus only
Account Name	BAAcctName		Text up to 50 characters	This field imports only if Sponsoring Bank option is On
Account Number	BAAcctNum		Text	Max length = 16; This field imports only if Sponsoring Bank option is On; <b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Address Lines	BAAddrLines		Text up to 150 characters	
Bank Import ID	BAImpID	Required to update existing	Text up to 20 characters	Bank/Financial institution import ID
Bank Name	BAFinInstit	Required to add new	Text up to 100 characters	Combination of Bank/Financial Institution name and Branch/Agency name must be unique
Bank Number	BANumber			NZ only
Branch	BABranch		Text up to 100 characters	Combination of Bank name and Branch/Agency name must be unique
City	BACity		Text up to 50 characters	
Country	BACountry		User-defined table values	New Country can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
County	BACounty			For all users except US and NZ
Destination	BADestID			Canada only
Immediate Origin - Other	BAOther	Required if Immediate Origin Type is set to "Other"	Up to 10 digits – alpha characters are invalid	
Immediate Origin Type	BAOrigType		"Transit/Routing no." and "Other"	US only; Defaults to "Transit/Routing no."; If Immediate Origin Type = Transit/Routing No., "Other" field will be ignored; if Origin Type = Other, "Transit /Routing no" field will be ignored.
Notes	BANotes		Text up to 1000 characters	
NZ City	BANZCity		User-defined table values	New city can be added to table during import if checkbox is on.
NZ Suburb	BASuburb		User-defined table values	New suburb can be added to table during import if checkbox is on.
Region	BARegion		User-defined table values	New Region can be added to table during import if checkbox is on
Sponsoring Bank	BASponBank		Yes, No, True, False, Y, N, T, F	Default = No
State/Province (for Canada)	BASState		User-defined table values	
Transit/Routing Number (US)/BSB Number (Aus)/Sort Code (UK)/Bank Number (NZ)/Institution Number (Can).	BATransRoutNum (US)/ BASortCode (UK)/BAInstID (Can)/BABSBNum (Aus).		Up to 8 digits –alpha characters are invalid; no formatting (#####)	Formatted with leading zeros if < 8 digits are entered

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
User Number	BAUserNum		Text	Max length = 24; This field imports only if Sponsoring Bank option is On
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	BAZip			

## Campaign Imports

Using **Import**, you can import new campaigns into *The Raiser's Edge*, update existing campaign records, or create an import file of campaign information.

The list below shows the available import types for importing campaigns. Each of these is a separate import type. The tables below the list show the fields that display for each import type.

- Campaign
- Campaign Appeal
- Campaign Attribute (also available as part of a Campaign import)
- Campaign Fund

## Campaign Fields

The Campaign Import is used to update or create campaign records in *The Raiser's Edge* or to create an import file containing campaign information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Campaign ID	CampID	Required to add new	Unique name up to 20 characters	
Category	CampCat		User-defined table values	New category can be added to table during import if checkbox is on
Default Appeal	CampDefAppeal		Appeal ID	ID of an existing Appeal
Default Fund	CampDefFund		Fund ID	ID of an existing Fund
Description	CampDesc	Required to add new	Unique text up to 100 characters	
End Date	CampEndDate		Date must be greater than start date if start date is present	
Is Inactive	CampInactive		Yes, No, True, False, Y, N, T, F	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Limit Appeals	CampLimitAppeal		Yes, No, True, False, Y, N, T, F	
Limit Funds	CampLimitFund		Yes, No, True, False, Y, N, T, F	
Notes	CampNotes		Memo	
Overall Goal	CampGoal		Currency up to \$1,000,000,000.00	
Start Date	CampStartDate		Date; must be before end date if end date is present	

## Campaign Appeal Fields

The Campaign Appeal Import is used to create appeals in campaign records in *The Raiser's Edge* or to create an import file containing campaign appeal information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	CampAppealID	Required to add new	ID of existing Appeal that is to be associated with the Campaign	
Campaign ID	CampID	Required to add new		

**Note:** This import type is used to import existing appeals newly associated with a campaign. Appeals already associated with this campaign remain and cannot be changed or deleted through **Import**.

## Campaign Attribute Fields

The Campaign Attribute Import is used to update and create attributes in campaign records in *The Raiser's Edge* or to create an import file containing campaign attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	CampAttrImpID	Required to update existing	Text up to 20 characters	Import ID of attribute
Campaign ID	CampID	* See note at end of table	ID of existing Campaign	Link to a Campaign; Creates exception if campaign does not match campaign of attribute being updated
Category	CampAttrCat	Required to add new	User-defined table values	
Comments	CampAttrCom		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Date	CampAttrDate		Date	
Description	CampAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

\*This field is available for campaign attribute imports. If available, this field is required to add new records

## Campaign Fund Fields

The Campaign Fund Import is used to create funds in campaign records in *The Raiser's Edge* or to create an import file containing campaign fund information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Fund ID	CampFundID	Required to add new	ID of existing Appeal that is to be associated with the Campaign	
Campaign ID	CampID	Required to add new		

**Note:** This import type is used to import existing appeals newly associated with a campaign. Appeals already associated with this campaign remain and cannot be changed or deleted through **Import**.

## Constituent Imports

Using **Import**, you can import a new constituent into *The Raiser's Edge*, update an existing constituent, or create an import file with the constituent information.

The list below shows the available import types for importing constituents. Each of these is a separate import type. The tables below the list show the fields that display for each import type.

- Additional Addressee/Salutation
- Constituent
- Constituent Address
- Constituent Address Attribute (also available as part of a constituent address import)
- Constituent Alias
- Constituent Appeal
- Constituent Attribute
- Constituent Bank
- Constituent Code
- Constituent Credit Card
- Constituent Notepad
- Constituent Phone
- Constituent Solicitor
- Education Attribute (also available as part of an Education/School Relationship Import)
- Education Major

- 
- Education Minor
  - Education/School
  - Individual Relationship
  - Individual Relationship Address Attribute (not available as part of a constituent import)
  - Individual Relationship Attribute (also available as part of an Individual Relationship Import)
  - Individual Relationship Phone
  - Organization Relationship
  - Organization Relationship Address Attribute (not available as part of a constituent import)
  - Organization Relationship Attribute (also available as part of an Organization Relationship Import)
  - Organization Relationship Phone
  - Proposal
  - Proposal Attribute (also available as part of a Proposal Import)
  - Proposal Notepad
  - Proposal Solicitor
  - Prospect Financial Information
  - Prospect Other Gift
  - Prospect Philanthropic Interest
  - Prospect Rating
  - Prospect Will Not Give To
  - Solicit Code
  - Solicitor Goal
  - Spouse
  - Spouse Business
  - Spouse Education/School
  - Spouse Phone
  - Tribute
  - Volunteer
  - Volunteer Assignment Interest
  - Volunteer Availability
  - Volunteer Award
  - Volunteer Checklist
  - Volunteer Courses/Training
  - Volunteer Job Assignment
  - Volunteer Medical Information
  - Volunteer Skills/Experience
  - Volunteer Special Need
  - Volunteer Time Sheet
  - Volunteer Type

**Note:** Proposal and prospect import types are available with *Prospect Research Management* only.

## Additional Addressee/Salutation Fields

The Additional Addressee/Salutation Import is used to update or create additional addressees/salutations for constituents or to create an import file of additional addresses/salutations for constituents. Additional constituent addresses/salutations can also be created and updated using a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Addressee/Salutation ID Number	AddSalID	Yes		
Addressee/Salutation Import ID	AddSalImpID	Yes		Required if you are creating an import file and intend to update the information and import it back into <b>The Raiser's Edge</b>
Addressee/Salutation Text	AddSalText	Yes, conditionally		Required if adding editable addressee/salutation
Constituent Import ID	ImportID	Yes, conditionally; *see note at end of table		Required if the addressee/salutation being imported/updated is for a constituent, and you are identifying the constituent by the Constituent Import ID
Constituent ID	ConsID	Yes, conditionally; *see note at end of table		Required if the addressee/salutation being imported/updated is for a constituent, and you are identifying the constituent by the Constituent Import ID

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN	SSNum	Yes, conditionally; *see note at end of table		Required if the addressee/salutation being imported/updated is for a constituent, and you are identifying the constituent by the Constituent SSN; <b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Editable	AddSalEditable	Yes, Required if adding an editable addressee/salutation		Required if adding an editable addressee/salutation.
Individual Relationship Import ID	AddSalRImpID	Yes, conditionally; *see note at end of table		Required if the addressee/salutation being imported/updated is for an individual relationship who is a constituent
Type	AddSalType	Yes		Required if you create an import file and then append new addressee/salutations to the file

\*These fields are available for only additional addressee/salutation imports. If available, one of the three constituent identifier fields (ConsID, ImportID, and SSNum), or the Individual relationship import ID are required to add new, depending on whether or not the add/sal is for a constituent or a relationship who is not a constituent. If the add/sal is for a relationship who is not a constituent, the individual relationship import ID is required. The three constituent identifier fields are ignored. It must contain the import ID of an existing individual relationship. If the add/sal is for a constituent, the Relationship import ID field is ignored and one of the three constituent identifier fields is required, depending on the option selected on Tab 1 to identify existing constituents.

## Constituent Fields

The Constituent Import is used to create new constituents, update existing constituents, or create an import file of constituent information. Several sets of information associated with constituents can also be created or updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Birth Date	Bday		Date	
Birthplace	Bplace		Text up to 50 characters	
Confirmation Returned	ConfirmationRet		Date	UK only; imported for individuals
Confirmation Sent	ConfirmationSent		Date	UK only; imported for individuals
Constituent ID	ConsID	* See note at end of table	Text up to 20 characters	
Deceased	Deceased		Yes, No, True, False, Y, N, T, F	Default = No; Only imported for Individuals; Deceased date is available if this is Yes
Deceased Date	DecDate		Date	Only imported for Individuals; Deceased date is available if this is Yes
Declaration Ends	DeclarationEndDate			UK only; If the Declaration End date is populated, but the Declaration Start date is not, the gift is an exception
Declaration Made	DeclarationMade		Date	UK only
Declaration Indicator	DeclarationIndicator			UK only
Declaration Start	DeclarationStartDate	Required if there is a Declaration Ends date in entered.		UK only; If the Declaration End date is populated and if it falls on or before the Declaration Start date, the gift is an exception

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Ethnicity	Ethnicity		User-defined code table values	New Ethnicities can be added to table during import if checkbox is on; Only imported for Individuals
First Name	FirstName			
Fiscal Year Starts	FiscalYrSt		MM/DD	Only imported for Organizations; Not available if Organization Matches Gifts = No
Gender	Gender		Male, Female, Unknown	Default = Unknown; Only imported for Individuals
Gives Anonymous	GivesAnon		Yes, No, True, False, Y, N, T, F	Default = No
Has No Valid Addresses	NoValidAddr		Yes, No, True, False, Y, N, T, F	Default = No
Import ID	ImportID	* See note at end of table	Text up to 20 characters	
Income	Income		User-defined code table values	New Income can be added to table during import if checkbox is on
Industry	Industry		User-defined code table values	New Industries can be added to table during import if checkbox is on; Only imported for Organizations
Is Honor/Memorial	IsHonMem		Yes, No, True, False, Y, N, T, F	Default = No
Is Inactive	IsInactive		Yes, No, True, False, Y, N, T, F	Default = No
Is Solicitor	IsSolicitor		Yes, No, True, False, Y, N, T, F	Default = No
Key Indicator	KeyInd	Required to add new	I, O	Organization fields are not imported with Individuals; Individual fields are not imported with Organizations

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Last Name	LastName	Required to add new individual	Text up to 50 characters	Only imported for Individuals.
Maiden Name	MaidName		Text up to 50 characters	Only imported for Individuals
Marital Status	MrtlStat		User-defined code table values	New Marital Status can be added to table during import if checkbox is on; Only imported for Individuals
Match Notes	MtcNotes		Text	Memo field; Only available if Org matches gifts = Yes
Matching Gift Factor	MtcFactor		Numeric	Formatted with 2 decimal places; Only available if Org matches gifts = Yes
Max Match Annual	MaxMtcAnn		Currency	Only available if Org matches gifts = Yes
Max Match Per Gift	MaxMtcPer		Currency	Only available if Org matches gifts = Yes
Max Match Total	MaxMtcTot		Currency	Only available if Org matches gifts = Yes
Middle Name	MidName		Text up to 50 characters	Only imported for Individuals
Min. Match Annual	MinMtcAnn		Currency	Only available if Org matches gifts = Yes
Min. Match Per Gift	MinMtcPer		Currency	Only available if Org matches gifts = Yes
Min. Match Total	MinMtcTot		Currency	Only available if Org matches gifts = Yes
Nickname	NickName		Text up to 50 characters	Only imported for Individuals
Number of Employees	NumEmp		Numeric up to 99,999	
Number of Subsidiaries	NumSubsid		Numeric up to 9,999	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Organization Matches Gifts	OrgMatch		Yes, No, True, False, Y, N, T, F	Default = No
Organization Name	OrgName	Required to add new organization	Text up to 60 characters	Only imported for Organizations
Parent Corporation Link	ParentCorpLink		Import ID of existing Organization	Link to an Organization; Creates exception if link is to Individual
Parent Corporation Name	ParentCorpName		Text up to 60 characters	If linked with Parent corp link field, any value in this field overwrites the name of the parent corporation that is linked
Pays Tax	PaysTax		Yes, No, and Unknown.	UK only; Imported for individuals; default = no.
Primary Addressee Editable	PrimAddEdit	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required if adding an editable addressee for the constituent
Primary Addressee ID Number	PrimAddID	Required, conditionally	Numeric – ID number of Add/Sal formula as set up in configuration.	Required to add a new Primary Addressee for the constituent
Primary Addressee Text	PrimAddText	Required, conditionally	Text up to 255 characters	Required if adding an editable addressee for the constituent (PrimAddEdit=Yes)
Primary Salutation Editable	PrimSalEdit	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required if adding an editable salutation for the constituent

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Primary Salutation ID Number	PrimSalID	Required, conditionally *NOTE – even if adding an editable add/sal (text) this field must contain a valid Add/Sal ID number; any ID number will do as long as it's a valid one from configuration	Numeric – ID number of Add/Sal formula as set up in configuration	Required to add a new Primary Salutation for the constituent
Primary Salutation Text	PrimSalText	Required, conditionally	Text up to 255 characters	Required if adding an editable salutation for the constituent (PrimSalEdit=Yes)
Prospect Classification	ProspectClass		User-defined code table values	New Classifications can be added to table during import if checkbox is on
Prospect Status	ProspectStat		User-defined code table values	New Prospect Status can be added to table during import if checkbox is on;
Receipt Type	RcptType		One receipt per gift, Consolidated receipts	Default = One receipt per gift
Religion	Religion		User-defined code table values	New Religions can be added to table during import if checkbox is on
Requests No Email	NoEmail			
Solicitor is Inactive	SollInactive		Yes, No, True, False, Y, N, T, F	Default = No

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table	Numeric up to 9 digits	Must be unique; Only imported for Individuals; If 9 digits, it is auto-formatted as ###-##-####; <b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Suffix 1	Suff1		User-defined code table values	New Suffixes can be added to table during import if checkbox is on; Only imported for Individuals
Suffix 2	Suff2		User-defined code table values	New Suffixes can be added to table during import if checkbox is on; Only imported for Individuals
Target	Trgt		User-defined code table values	New Target can be added to table during import if checkbox is on
Tax Declaration Comments	TaxNotes		Text	UK only; Imports for individuals
Title 1	Titl1		User-defined code table values	New Titles can be added to table during import if checkbox is on; Only imported for Individuals;
Title 2	Titl2		User-defined code table values	New Titles can be added to table during import if checkbox is on; Only imported for Individuals;

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

**Exception:** If importing relationships as part of a constituent import, this field is required in the import file whether the constituent is being added or updated.

## Constituent Address Fields

The Constituent Address Import is used to update or create constituent addresses or to create an import file containing that information. Constituent addresses can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Import ID	AddrImpID	Required	Text up to 20 characters	Import ID of address
Address Lines	AddrLines		Text up to 150 characters; /n is used to denote a CR-LF in this field	All address lines in one field.
CART	AddrCART		Text up to 10 characters	
City (US, UK, Can)/Suburb (Aus)	AddrCity		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Country	AddrCountry		User-defined table values	New Country can be added to Configuration table during import if checkbox is on
County	AddrCounty		User-defined table values	New Counties can be added to table during import if checkbox is on
Date From	AddrValidFrom		Date	
Date To	AddrValidTo		Date	
DPC	AddrDPC		Numeric – 2 digits	US only
DPS	REGAddrDPS		Alpha-numeric - 2 characters.	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Information source	AddrInfoSrc		User-defined table values	New Address Info Sources can be added to table during import if checkbox is on
LOT	AddrLOT		Text up to 5 characters with 1 <sup>st</sup> character = A or D and last 4 characters numeric	
NZ City	AddrNZCity		User-defined table values	New city information can be added to table during import if checkbox is on
NZ Suburb	AddrNZSuburb		User-defined table values	New suburb information can be added to table during import if check box is on
Preferred Address	PrefAddr		Yes, No, True, False, Y, N, T, F	If no preferred address exists for a constituent, this field defaults to Yes, otherwise default = No; <b>NOTE:</b> If the constituent has another address marked as preferred, the existing preferred address is unmarked as preferred, and the newly imported address marked as the new preferred address
Region	AddrRegion		User-defined table values	New Regions can be added to table during import if checkbox is on
Seasonal Address	AddrSeasonal	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required to be set=Yes if adding a new seasonal address

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Seasonal From	AddrSeasFrom	Required, conditionally	Month/Day	Required if adding a new seasonal address
Seasonal To	AddrSeasTo	Required, conditionally	Month/Day	Required if adding a new seasonal address
Send Mail	AddrSendMail		Yes, No, True, False, Y, N, T, F	Default = Yes
State/Province (for Canada)	AddrState		User-defined table values	New States can be added to table during import if checkbox is on; * See note at end of table
Address Type	AddrType	Because the default is set to "Home" in Import, data for this field is not required in the Import file.	User-defined table values	New Address Types can be added to table during import if checkbox is on; In the absence of Address Type information in the Import file, the Import process defaults the Address Type to "Home" (Indicator = "Alternate").
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	AddrZIP		Text up to 12 characters	Formats nine-digit zip codes to zip +4 if no hyphen is present in the import file; * See note at end of table

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Address Attribute Fields

The Constituent Address Attribute Import is used to update or create constituent address attributes or to create an import file containing that information. Constituent address attributes can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Import ID	CADAttrAddrImpID	Required	Text	
Attribute Import ID	CADAttrImpID	Required	Text	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Category	CADAttrCat	Required	User-defined table values	
Comments	CADAttrCom		Text	
Gift Date	CADAttrDate		Date	
Description	CADAttrDesc	Required	Text	

## Constituent Alias Fields

The Constituent Alias Import is used to create aliases for constituents or to create an import file of constituent aliases. Constituent aliases can also be created through a Constituent Import. Aliases can be added through **Import**; they cannot be updated.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Alias Name	AliasName	Required	Text up to 60 characters	
Alias Type	AliasType		User-defined table values	New Alias Types can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Appeal Fields

The Constituent Appeal Import is used to update or create appeal information on a constituent record or to create an import file containing that information. Constituent appeal information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	CAPApealID	Required to add new	ID of existing Appeal	Link to existing Appeal

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal Import ID	CAPImpID	Required to update existing	Text up to 20 characters	Import ID of constituent appeal
Comments	CAPComment		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Appeal Date	CAPDate		Date	Default = system date
Marketing Segment	CAPSegment		Numeric up to 50 characters	Used with <b>Blackbaud Direct Marketing</b>
Marketing Source Code	CAPSourceCode		Numeric up to 50 characters	Used with <b>Blackbaud Direct Marketing</b>
Mailing ID	CAPMailingID		Numeric up to 50 characters	Used with <b>Blackbaud Direct Marketing</b>
Package ID	CAPPackageID		Import ID of a Package that belongs to this Appeal	Package must exist as part of the specified Appeal
Response	CAPResponse		User-defined table values	New Appeal Response can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Attribute Fields

The Constituent Attribute Import is used to update or create constituent attributes on a constituent record or create an import file containing that information. Constituent attributes can also be created and updated for Constituent records through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	CAttrImpID	Required to update existing attribute	Text up to 20 characters	Import ID of constituent attribute
Category	CAttrCat	Required to add new	User-defined table values	
Comments	CAttrCom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date	CAttrDate		Date	
Description	CAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Bank Fields

The Constituent Bank Import is used to update or create bank relationships for constituents or to create an import file containing that information. Bank relationships for constituents can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Account is Inactive	FIRAcctInactive		Yes, No, True, False, Y, N, T, F	Default = No
Account Notes	FIRAcctNotes		Text	Memo field
Account Number	FIRAcctNum	Text up to 20 characters		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Account Type	FIRAcctType		Checking, Savings, Other	Default = Checking
Address Lines	FIRAddrLines			
Bank Import ID	BAImpID	Required to add new	Import ID of existing Financial Institution	Link to existing Financial Institution
Bank Name	FIRFinInstit	Required to add new	Test up to 100 characters	Combination of Bank/Financial Institution name and Branch/Agency name must be unque.
Bank Relationship Import ID	FIRRelImpID	Required to update existing	Text up to 20 characters	Import ID of Financial Institution Relationship
Branch	FIRBranch		Text up to 100 characters	Combination of Bank name and Branch/Agency name must be unique
City	FIRCity			
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		
Country	FIRCountry			
County	FIRCounty			
Holder	FIRHolder			UK only
NZ City	FIRNZCity			
NZ Suburb	FIRSuburb			
Primary Bank Information	FIRPrimBank		Yes, No, True, False, Y, N, T, F	Default = No; If Yes, creates exception if other financial institution relationship has Primary bank info set to Yes
State/Province (for Canada)	FIRState			
State Number	FIRStateNum			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Transit/Routing Number (US)/BSB Number (Aus)/Sort Code (UK)/Bank Number (NZ)/Institution Number (Can).	FIRTransRoutNum (US)/ FIRSortCode (UK)/FIRInstID(Can)/FIRBSBNum(Aus)/FIRNum(NZ).		Up to 8 digits –alpha characters are invalid; no formatting (#####)	Formatted with leading zeros if < 8 digits are entered
ZIP	FIRZip			

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Code Fields

The Constituent Code Import is used to update or create constituent codes for a constituent or to create an import file containing that information. Constituent codes can also be created and updated for constituents through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituency	ConsCode	Required to add new	User-defined table values	New Constituent Codes can be added to table during import if checkbox is on
Constituent Code Import ID	ConsCodeImpID	Required to update existing	Text up to 20 characters	Import ID of constituent code
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date From	ConsCodeDateFrom		Date	Date from must be on or before Date to
Date To	ConsCodeDateTo		Date	Date to must be on or after Date from

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Credit Card Fields

The Constituent Credit Card Import is used to update or create credit card information on a constituent record or to create an import file containing that information. Constituent credit card information can also be created and updated through a Constituent Import.

**Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, **The Raiser's Edge** stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Constituent Notepad Fields

The Constituent Notepad Import is used to update or create constituent notepads or to create an import file containing that information. Constituent notepad information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Author	NoteAuth		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Notepad Date	NoteDate	Required to add new	Date	
Description	NoteDesc		Text up to 255 characters	
Notepad Import ID	NoteImpID	Required to update existing	Text up to 20 characters	Import ID of notepad
Notes	NoteNotes		Text	Memo field
Title	NoteTitle		Text up to 50 characters	
Notepad Type	NoteType	Required to add new	User-defined table values	New Notepad Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Constituent Phone Fields

The Constituent Phone Import is used to update or create constituent phone information or to create an import file containing that information. Constituent phone information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Import ID	PhoneAddrImpID	Required to add new and update	Import ID of existing Address	Link to Address; Creates exception if address does not match address of phone being updated
Phone Import ID	PhoneImpID	Required to update existing	Text up to 20 characters	
Phone Number	PhoneNum		Text up to 100 characters	No formatting performed during import

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Phone Type	PhoneType	Required to add new	User-defined table values	New Phone Types can be added to table during import if checkbox is on

## Constituent Solicitor Fields

The Constituent Solicitor Import is used to update or create solicitor information on a constituent record or to create an import file of constituent solicitors. Constituent solicitor information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	ASRAmt		Currency	
Campaign	ASRCampID		ID of existing Campaign	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date From	ASRDateFrom		Date	Date from must be on or before Date to
Date To	ASRDateTo		Date	Date to must be on or after Date from
Fund	ASRFundID		ID of existing Fund	
Notes	ASRNotes		Text	Memo field
Solicitor Link	ASRLink	Required to update existing and add new	Import ID of existing Constituent	Link to existing Constituent; Must be a solicitor
Solicitor Relationship Import ID	ASRImpID	Required to update existing	Text up to 20 characters	Import ID of assigned solicitor relationship

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Solicitor Type	ASRType		User-defined table values	New Solicitor Type can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Education Attribute Fields

The Education Attribute Import is used to update or create attributes on educational/school records or to create an import file containing that information. Education attributes on constituent and individual relationship records can also be created and updated through a Constituent Import or an Education/School Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	ESRAttrImpID	Required to update existing	Text up to 20 characters	Import ID of education/school relationship attribute
Category	ESRAttrCat	Required to add new	User-defined table values	
Comments	ESRAttrCom		Text up to 50 characters	
Gift Date	ESRAttrDate		Date	
Description	ESRAttrDesc	Required to add new	Depends on type of attribute as set in <i>Configuration</i>	
Education Relationship Import ID	ESRAttrESRImpID	Required to add new and update existing	Import ID of education/school relationship	Link to existing education/school relationship

## Education Major Fields

The Education Major Import is used to update or create majors for education/school records or to create an import file containing that information. Majors for education/school records can also be created and updated through a Constituent Import or an Education/School Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	ESRMajCom		Text up to 255 characters	
Education Relationship Import ID	ESRMajESRImpID	Required to add new and update existing	Import ID of education/school relationship	Link to existing education/school relationship

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Major	ESRMajMajor	Required to add new and update existing	User-defined table values	New Major/Minor can be added to table during import if checkbox is on
Major Import ID	ESRMajImpID	Required to update existing	Text up to 20 characters	Import ID of education/school relationship major

## Education Minor Fields

The Education Minor Import is used to update or create minors for education/school records or to create an import file containing that information. Minors for education/school records can also be created and updated through a Constituent Import or an Education/School Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	ESRMinCom		Text up to 255 characters	
Education Relationship Import ID	ESRMinESRImpID	Required to add new and update existing	Import ID of education/school relationship	Link to existing education/school relationship
Minor	ESRMinMinor	Required to add new and update existing	User-defined table values	New Major/Minor can be added to table during import if checkbox is on
Minor Import ID	ESRMinImpID	Required to update existing	Text up to 20 characters	Import ID of education/school relationship minor

## Education/School Fields

The Education/School Import is used to update or create educational information for constituents and individuals or to create an import file containing that information. Educational information for constituents and individuals can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Campus	ESRCampus		Text up to 50 characters	
Class of	ESRClassOf		Numeric up to 4 digits	
Class of Degree	ESRClassOfDegree			UK only
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date Entered	ESRDateEnt		Date	Date entered must be on or before Date graduated and date left; Fuzzy date allowed
Date Graduated	ESRDateGrad		Date	Date graduated must be on or after Date entered; Fuzzy date allowed
Date Left	ESRDateLeft		Date	Date left must be on or after Date entered; Fuzzy date allowed
Degree	ESRDegree		User-defined table values	New Degrees can be added to table during import if checkbox is on
Education Relationship Import ID	ESRImpID	Required to update existing	Text up to 20 characters	Import ID of Education/School Relationship
Faculty	ESRFaculty			UK only
Fraternity/Sorority	ESRFrat		Text up to 50 characters	
GPA	ESRGPA		Numeric up to 4 digits	Decimal numbers allowed

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Individual Relationship Import ID	ESRIRImpID	Required, conditionally.	Import ID of existing Individual relationship	** See note at end of table. This field is used <b>only</b> if the education record being imported is for an individual relationship (rather than an individual constituent); Link to an existing individual relationship.
Known Name	ESRKnownName		Text up to 50 characters	
Notes	ESRNotes		Text	Memo field
Primary Alumni	ESRPrimAlum		Yes, No, True, False, Y, N, T, F	Default = No
School Name	ESRSchoolName	Required to add new	User-defined table values	New Schools can be added to table during import if checkbox is on
Status	ESRStatus		User-defined table values	New Education Status can be added to table during import if checkbox is on
Subject of Study	ESRSubject			UK only
School Type	ESRType		User-defined table values	New School Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

\*\* This field should contain a relationship import ID only if this education relationship is for an individual relationship (constituent or not) — not if the education relationship is for a constituent. This will be the import ID of the individual relationship.

## Individual Relationship Fields

The Individual Relationship Import is used to update or create individual relationship information for constituents or to create an import file containing that information. Individual relationship information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	IRAck		Yes, No, True, False, Y, N, T, F	Default = No
Automatically Soft Credit Gifts	IRAutoSoftCredit		Yes, No, True, False, Y, N, T, F	Default = No
Birth Date	IRBDay		Date	Fuzzy date allowed
Constituent ID	ConsID	* See note at end of table		**Will not update if relationship is an existing constituent
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Contact Type	IRContactType		User-defined table values	New Contact Types can be added to table during import if checkbox is on; Not available unless Is Contact = Yes
Date From	IRFromDate		Date	Date from must be on or before Date to; Fuzzy date allowed
Date To	IRToDate		Date	Date to must be on or after Date from; Fuzzy date allowed
Deceased	IRDeceased		Yes, No, True, False, Y, N, T, F	Default = No
Deceased Date	IRDecDate		Date	Fuzzy date allowed; Not available unless Deceased = Yes

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Do Not Mail to Contact	IRNoMail		Yes, No, True, False, Y, N, T, F	Default = No; Not available unless Is contact = Yes
First Name	IRFirstName		Text up to 50 characters	**Will not update if relationship is an existing constituent
Gender	IRGender		Male, Female, Unknown	Default = Unknown
Is Contact	IRIsContact		Yes, No, True, False, Y, N, T, F	Default = No
Is Employee	IRIsEmp		Yes, No, True, False, Y, N, T, F	Default = No
Is Head of Household	IRIsHH		Yes, No, True, False, Y, N, T, F	Default = No
Is Primary	IRIsPrimary		Yes, No, True, False, Y, N, T, F	Default = No
Is Spouse	IRIsSpouse		Yes, No, True, False, Y, N, T, F	Default = No
Last Name	IRLastName	Required, conditionally	Text up to 50 characters	Required if the import file contains new, non-constituent individual relationships when you import the file back into <b>The Raiser's Edge</b> ; **will not update if relationship is an existing constituent
Maiden Name	IRMaidName		Text up to 50 characters	**Will not update if relationship is an existing constituent
Middle Name	IRMidName		Text up to 50 characters	**Will not update if relationship is an existing constituent
Nickname	IRNickName		Text up to 50 characters	**Will not update if relationship is an existing constituent
Notes	IRNotes		Text	Memo field

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Position	IRPos		Text up to 50 characters	
Primary Addressee Editable	IRPrimAddEdit		Yes, No, True, False, Y, N, T, F	Default = No
Primary Addressee ID Number	IRPrimAddID		Numeric – ID number of Add/Sal formula as set up in configuration	If Primary add editable = Yes this field must contain any valid add/sal ID number; If Primary add editable = No this field must contain the ID number of the add/sal being imported
Primary Addressee Text	IRPrimAddText		Text up to 255 characters	If Primary add editable = Yes this field accepts any text up to 255 characters in length; If Primary add editable = No this field is ignored
Primary Salutation Editable	IRPrimSalEdit		Yes, No, True, False, Y, N, T, F	Default = No
Primary Salutation ID Number	IRPrimSalID		Numeric – ID number of Add/Sal formula as set up in configuration	If Primary sal editable = Yes this field must contain any valid add/sal ID number; If Primary sal editable = No this field must contain the ID number of the add/sal being imported
Primary Salutation Text	IRPrimSalText		Text up to 255 characters	If Primary sal editable = Yes this field accepts any text up to 255 characters in length; If Primary sal editable = No this field is ignored
Print Organization	IRPrintOrg		Yes, No, True, False, Y, N, T, F	Default = No

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Print Position	IRPrintPos		Yes, No, True, False, Y, N, T, F	Default = No
Profession	IRProf		User-defined table values	New Professions can be added to table during import if checkbox is on
Reciprocal	IRRecip		User-defined table values	New Relationships can be added to table during import if checkbox is on
Relationship	IRRelat		User-defined table values	New Relationship can be added to table during import if checkbox is on
Relationship Import ID	IRImpID	Required to update existing	Text up to 20 characters	Import ID of individual relationship
Relationship Link	IRLink	Required if the import file will contain new individual relationships for existing constituents when imported back into <i>The Raiser's Edge</i> .	Import ID of constituent	Link to existing constituent
SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	IRSSNum		Same as for constituent SSN	<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Suffix 1	IRSuff1		User-defined table values	New Suffixes can be added to table during import if checkbox is on; **will not update if relationship is an existing constituent

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Suffix 2	IRSuff2		User-defined table values	New Suffixes can be added to table during import if checkbox is on; **will not update if relationship is an existing constituent
Title 1	IRTit1		User-defined table values	New Titles can be added to table during import if checkbox is on; **will not update if relationship is an existing constituent
Title 2	IRTit2		User-defined table values	New Titles can be added to table during import if checkbox is on; **will not update if relationship is an existing constituent

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

\*\*You can update this information using a Constituent Import, rather than a Relationship Import.

**Note:** If you are adding new seasonal address information, you must include the **Seasonal Address** (IRAddrSeasonal), **Seasonal From** (IRAddrSeaFrom), and **Seasonal To** (IRAddrSeaTo) fields from the **Address** category list.

## Individual Relationship Address Fields

The following table lists all Individual Relationship Address Fields available for individual relationship imports (a branch of the field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Lines	IRAddrLines		Text up to 150 characters; /n is used to denote a CR-LF in this field	All address lines in one field; * See note at end of table
CART	IRAddrCART		Text up to 10 characters	
City	IRAddrCity		Text up to 50 characters	* See note at end of table

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Country	IRAddrCountry		User-defined table values	New Country can be added to Configuration table during import if checkbox is on
County	IRAddrCounty		User-defined table values	New Counties can be added to table during import if checkbox is on
Date From	IRAddrValidFrom		Date	
Date To	IRAddrValidTo		Date	
DPC	IRAddrDPC		Numeric – 2 digits	US only
Information Source	IRAddrInfoSrc		User-defined table values	New Address Info Sources can be added to table during import if checkbox is on
LOT	IRAddrLOT		Text up to 5 characters with 1st character = A or D and last 4 characters numeric	
NZ City	IRAddrNZCity		User-defined table values	New city information can be added to tables during import if checkbox is on
NZ Suburb	IRAddrNZSuburb		User-defined table values	New suburb information can be added to tables during import if checkbox is on
Region	IRAddrRegion		User-defined table values	New Regions can be added to table during import if checkbox is on
Seasonal Address	IRAddrSeasonal	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required to be set=Yes if adding new seasonal address; Default=No
Seasonal From	IRAddrSeaFrom	Required, conditionally	Month/Day	Required if adding new seasonal address

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Seasonal To	IRAddrSeaTo	Required, conditionally	Month/Day	Required if adding new seasonal address
Send Mail	IRSendMail		Yes, No, True, False, Y, N, T, F	Default = Yes
State/Province (for Canada)	IRAddrState		User-defined table values	New States can be added to table during import if checkbox is on; * See note at end of table
Address Type	IRAddrType		User-defined table values	New Address Types can be added to table during import if checkbox is on
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	IRAddrZIP		Text up to 12 characters	US only; Formats nine-digit zip codes to zip +4 if no hyphen is present in the import file; * See note at end of table
Relationship Import ID	IRAddrIRImpID	Required to add new <b>and</b> update existing	ID of existing Individual Relationship	Link to individual relationship; Creates exception if relationship does not match relationship of address being updated

\*Individual relationship addresses are imported according to the rules stated below. These rules apply when importing new and updating existing records. In some cases, links that currently exist between addresses in the database may be broken through import.

- The following is true for address information imported for an Individual Relationship (Constituent), including spouse, to an Individual:

If the relationship is new (imported as new), the relationship's address information is automatically linked to the constituent's preferred address record. The import does not change this link. Any address information included in the relationship import file overwrites the relationship's constituent preferred address. If no address information is included in the relationship import file, neither the relationship's address nor the constituent's preferred address change since they are linked.

If a relationship exists (imported as an update), relationship's address retains whatever links exist. Any address information included in the relationship import file updates the relationship's address along with all linked addresses. If no address information is included in the relationship import file, the relationship's address and all linked addresses are unchanged.

- The following is true for address information imported for a Spouse Relationship (non-constituent) to an Individual:

If the relationship is new (imported as new), the relationship’s address is not linked to any other address. Any address information included in the relationship import file is imported as the relationship’s address only. If no address info is included in the relationship import file, the relationship’s address defaults from its parent’s preferred address, but they are not linked.

If the relationship exists (imported as an update), the relationship’s address does **NOT** retain any links previously created. Any address information included in the relationship import file is imported as the relationship’s address only. If no address information is included in the relationship import file, the relationship’s address is unchanged, as are all other addresses previously linked. Any existing links to this address are broken. The following is true for address information imported for an Individual Relationship (non-constituent), other than the spouse, to an Individual:

If the relationship is new (imported as new), the relationship’s address is not linked to any other address. Any address information included in the relationship import file is imported as the relationship’s address only. If no address information is included in the relationship import file, the relationship’s address is blank.

If the relationship exists (imported as an update), the relationship’s address does **NOT** retain any links previously created. Any address information included in the relationship import file is imported as the relationship’s address only. If no address information is included in the relationship import file, the relationship’s address is unchanged, as are all other addresses previously linked. Any existing links to this address are broken.

- The following is true for address information imported for an Individual Relationship (constituent or not) to an Organization:

If the relationship is new (imported as new), the relationship’s address is not linked to any other address. Any address information included in the relationship import file is imported as the relationship’s address only. If no address info is included in the relationship import file, the relationship’s address defaults from its parent’s preferred address, but they are not linked.

If the relationship exists (imported as an update), the relationship’s address does **NOT** retain any links previously created. Any address information included in the relationship import file is imported as the relationship’s address only. If no address information is included in the relationship import file, the relationship’s address is unchanged, as are all other addresses previously linked. Any existing links to this address are broken.

## Individual Relationship Address Attribute Fields

The Individual Relationship Address Attribute Import is used to update or create new attributes on individual relationship addresses or to create an import file containing that information.

Raiser’s Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute import ID	IRAddrAttrImpID	Required to update existing	Text up to 20 characters	Import ID of individual relationship attribute
Category	IRAddrAttrCat	Required to add new	User-defined table values	
Comments	IRAddrAttrCom		Text up to 50 characters	
Gift Date	IRAddrAttrDate		Date	
Description	IRAddrAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Import ID	IRAddrAttrIRImpID	Required to add new	Import ID of individual relationship	Link to existing individual relationship

## Individual Relationship Attribute Fields

The Individual Relationship Attribute Import is used to update or create new attributes on individual relationship records or to create an import file containing that information. Individual relationship attributes can also be created and updated through a Constituent Import or an Individual Relationship Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute import ID	IRAttrImpID	Required to update existing	Text up to 20 characters	Import ID of individual relationship attribute
Category	IRAttrCat	Required to add new	User-defined table values	
Comments	IRAttrCom		Text up to 50 characters	
Attribute Date	IRAttrDate		Date	
Description	IRAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Relationship Import ID	IRAttrIRImpID	Required to add new	Import ID of individual relationship	Link to existing individual relationship

## Individual Relationship Phone Fields

The Individual Relationship Phone Import is used to update or create new phone information for individual relationships or to create an import file containing that information. Individual relationship phone information can also be created and updated through a Constituent Import or an Individual Relationship Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Phone Import ID	IRPhoneImpID	Required to update existing	Text up to 20 characters	
Phone Number	IRPhoneNum		Text up to 100 characters	No formatting performed during import
Phone Type	IRPhoneType	Required to add new	User-defined table values	New Phone Types can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Import ID	IRPhoneIRImpID	Required to add new <b>and</b> update existing	ID of existing Individual Relationship	Link to individual relationship; Creates exception if relationship does not match relationship of phone being updated

## Organization Relationship Fields

The Organization Relationship Import is used to update or create organization relationship information for constituents or to create an import file containing that information. Organization relationship information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	ORHMack		Yes, No, True, False, Y, N, T, F	Default = No
Automatically Soft Credit Gifts	ORAutoSoftCredit		Yes, No, True, False, Y, N, T, F	Default = No
Constituent ID	ConsID	* See note at end of table		**Will not update if relationship is an existing constituent
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Contact Type	ORContactType		User-defined table values	New Contact Types can be added to table during import if checkbox is on; Not available unless Is Contact = Yes
Date From	ORFromDate		Date	Date from must be on or before Date to; Fuzzy date allowed

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Date To	ORToDate		Date	Date to must be on or after Date from; Fuzzy date allowed
Do Mot Mail to Contact	ORNoMail		Yes, No, True, False, Y, N, T, F	Default = No; Not available unless Is contact = Yes
Fiscal Year Starts (US)/Financial Year Starts (UK)	ORFiscalYear		MM/DD	Not available if Org matches gifts = No
Income	ORIncome		User-defined table values	New Incomes can be added to table during import if checkbox is on
Individual Relationship Import ID	ORIRImpID	Required, conditionally	Import ID of existing Individual relationship	Required if the organization relationship record being imported/updated is for an individual relationship of the constituent and not the constituent itself; Link to an existing Individual Relationship; The individual is <b>always</b> marked as an employee of the Organization
Industry	ORIndustry		User-defined table values	New industries can be added to table during import if checkbox is on
Is Contact	ORIsContact		Yes, No, True, False, Y, N, T, F	Default = No
Is Employee	ORIsEmp		Yes, No, True, False, Y, N, T, F	Default = No
Is Primary	ORIsPrimary		Yes, No, True, False, Y, N, T, F	Default = No
Match Notes	ORMtcNotes		Text	Memo field
Matching Gift Factor	ORMtcFactor		Numeric up to 9,999,999,999	
Max Match Annual	ORMaxMtcAnn		Currency	
Max Match Per Gift	ORMaxMtcGift		Currency	
Max Match Total	ORMaxMtcTotal		Currency	
Min. Match Annual	ORMinMtcAnn		Currency	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Min. Match Per Gift	ORMinMtcGift		Currency	
Min. Match Total	ORMinMtcTot		Currency	
Name	ORFullName	Required, conditionally	Text up to 255 characters	Required if the import file contains new, non-constituent organizational relationships when imported back into <b>The Raiser's Edge</b> ; **will not update if relationship is an existing constituent
Notes	ORNotes		Text	Memo field
Organization Matches Gifts	OROrgMatchesGift		Yes, No, True, False, Y, N, T, F	Default = No
Position	ORPos		Text up to 50 characters	
Print Organization	ORPrintOrg		Yes, No, True, False, Y, N, T, F	Default = No
Print Position	ORPrintPos		Yes, No, True, False, Y, N, T, F	Default = No
Profession	ORProf		User-defined table values	New Professions can be added to table during import if checkbox is on
Reciprocal	ORRecip		User-defined table values	New Relationships can be added to table during import if checkbox is on
Relationship	ORRelat		User-defined table values	New Relationships can be added to table during import if checkbox is on
Relationship Import ID	ORImpID	Required to update existing	Text up to 20 characters	Import ID of organization relationship

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Link	ORLink	Required, conditionally	Import ID of constituent	Required if the import file contains new organizational relationships for existing constituents when imported back into <i>The Raiser's Edge</i>

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

\*\*You can update this information using a Constituent Import, rather than a Relationship Import.

**Note:** Name information imported for an organization relationship who is also a constituent overwrites the constituent's name.

**Note:** If you are adding new seasonal address information, you must include the **Seasonal Address** (ORAddrSeasonal), **Seasonal From** (ORAddrSeaFrom), and **Seasonal To** (ORAddrSeaTo) fields from the **Address** category list.

## Organization Relationship Address Fields

The following table list all Organization Relationship Address fields available for organization relationship imports (a branch of the Organization Relationship field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Lines	ORAddrLines		Text up to 150 characters; /n is used to denote a CR-LF in this field	All address lines in one field; * See note at end of table
CART	ORAddrCART		Text up to 10 characters	
City	ORAddrCity		Text up to 50 characters	* See note at end of table
Country	ORAddrCountry		User-defined table values	New Country can be added to table during import if checkbox is on
County	ORAddrCounty		User-defined table values	New Counties can be added to table during import if checkbox is on
Date From	ORAddrValidFrom		Date	Date from must be on or before date to
Date To	ORAddrValidTo		Date	Date to must be on or after date from

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
DPC	ORAddrDPC		Numeric – 2 digits	
DPS	REGAddrDPS		Alpha-numeric - 2 characters.	UK only
Information Source	ORAddrInfoSrc		User-defined table values	New Address Info Sources can be added to table during import if checkbox is on
LOT	ORAddrLot		Text up to 5 characters with 1 <sup>st</sup> character = A or D and last 4 characters numeric	
NZ City	ORAddrNZCity		User-defined table values	New city information can be added to tables during import if checkbox is on
NZ Suburb	ORAddrNZSuburb		User-defined table values	New suburb information can be added to tables during import if checkbox is on
Organization relationship address	ORAddrORImpID			
Region	ORAddrRegion		User-defined table values	New Regions can be added to table during import if checkbox is on
Seasonal Address	ORAddrSeasonal	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required to be set=Yes if adding a new seasonal address; Default=No
Seasonal From	ORAddrSeaFrom	Required, conditionally	Month/Day	Required if adding a new seasonal address
Seasonal To	ORAddrSeaTo	Required, conditionally	Month/Day	Required if adding a new seasonal address
Send Mail	ORSendMail		Yes, No, True, False, Y, N, T, F	Default = Yes

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
State/Province (for Canada)	ORAddrState		User-defined table values	New States can be added to table during import if checkbox is on; * See note at end of table
Address Type	ORAddrType		User-defined table values	New Address Types can be added to table during import if checkbox is on
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	ORAddrZIP		Text up to 12 characters	Formats nine-digit zip codes to zip +4 if no hyphen is present in the import file; * See note at end of table

\*Organization relationship addresses are imported according to the rules stated below. These rules apply when importing new and updating existing records. In some cases, links between addresses in the database may be broken through the import.

- The following rules apply for address information imported for an Organization Relationship (Constituent) to an Individual or an Organization:

If the relationship is new (imported as new), the relationship's address information is automatically linked to the constituent's preferred address record. The import does not change the link. Any address information included in the relationship import file overwrites the relationship's constituent preferred address. If no address information is included in the relationship import file, neither the relationship's address nor its constituent's preferred address change, since they are linked.

If the relationship exists (imported as an update), the relationship's address retains whatever links exist. Any address information included in the relationship import file updates the relationship's address along with all linked addresses. If no address information is included in the relationship import file, the relationship's address and all linked addresses are unchanged.

- The following rules apply for address information imported for an Organization Relationship (non-constituent) to an Individual or an Organization:

If the relationship is new (imported as new), the relationship's address is not linked to any other address. Any address information included in the relationship import file is imported as the relationship's address only. If no address information is included in the relationship import file, the relationship's address is blank.

If the relationship exists (imported as an update), the relationship's address does **NOT** retain any links previously created. Any address information included in the relationship import file is imported as the relationship's address only. If no address information is included in the relationship import file, the relationship's address is unchanged, as are all other addresses previously linked. Any existing links to this address are broken.

## Organization Relationship Address Attribute Fields

The Organization Relationship Import is used to update or create organization relationship information for constituents or to create an import file containing that information. Organization relationship information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	ORAddrAttrImpID	Required to update existing	Text up to 20 characters	Import ID of relationship address attribute
Category	ORAddrAttrCat	Required to add new	User-defined table values	Must be existing Address Attribute Category
Comments	ORAddrAttrCom		Text up to 50 characters	
Gift Date	ORAddrAttrDate		Date	
Description	ORAddrAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Relationship Import ID	ORAddrAttrORImpID	Required to add new <b>and</b> update existing	ID of existing organization relationship	Link to relationship; Creates exception if relationship does not match relationship of attribute being updated

## Organization Relationship Attribute Fields

The Organization Relationship Attribute Import is used to update or create new attributes on organization relationship records or to create an import file containing that information. Organization relationship attributes can also be created and updated through a Constituent Import or an Organization Relationship Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	ORAttrImpID	Required to update existing	Text up to 20 characters	Import ID of organization relationship attribute
Category	ORAttrCat	Required to add new	User-defined table values	
Comments	ORAttrCom		Text up to 50 characters	
Gift Date	ORAttrDate		Date	
Description	ORAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Import ID	ORAttrORImpID	Required to add new and update existing	Import ID of organization relationship	Link to existing organization relationship

## Organization Relationship Phone Fields

The Organization Relationship Phone Import is used to update or create new phone information for organization relationships or to create an import file containing that information. Organization relationship phone information can also be created and updated through a Constituent Import or an Organization Relationship Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Phone Import ID	ORPhoneImpID	Required to update existing	Text up to 20 characters	
Phone Number	ORPhoneNum		Text up to 100 characters	No formatting performed during import
Phone Type	ORPhoneType	Required to add new	User-defined table values	New Phone Types can be added to table during import if checkbox is on
Relationship Import ID	ORPhoneORImpID	Required to add new	ID of existing Organization Relationship	Link to organization relationship; Creates exception if relationship does not match relationship of phone being updated

## Proposal Fields

The Proposal Import is used to update or create new proposals for constituent prospects or to create an import file of proposals. Proposals can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Amount Asked	PRAmtAsk		Currency	
Amount Expected	PRAmtExp		Currency	
Amount Funded	PRAmtFund		Currency	
Campaign	PRCampID		ID of existing Campaign	Link to existing Campaign
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Contact	PRContact			
Date Asked	PRDateAsk		Date	
Date Expected	PRDateExp		Date	
Date Funded	PRDateFund		Date	
Date Rated	PRDateRate		Date	
Deadline	PRDeadline		Date	
Fund	PRFundID		ID of existing Fund	Link to existing Fund
Instrument	PRInstr		User-defined table values	New Instruments can be added to table during import if checkbox is on
Is Inactive	PRIsInactive		Yes, No, True, False, Y, N, T, F	Default = No
Name	PRName	Required to add new	Text up to 255 characters	
Notes	PRNotes		Text	Memo field
Proposal Import ID	PRImpID	Required to update existing	Text up to 20 characters	Proposal Import ID
Purpose	PRPurpose		User-defined table values	New Purposes can be added to table during import if checkbox is on
Rating	PRRating		User-defined table values	New Ratings can be added to table during import if checkbox is on
Reason	PRReason		User-defined table values	New Proposal Reasons can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Status	PRStatus		User-defined table values	New Proposal Status can be added to table during import if checkbox is on
Type of Gift	PRTYPEGift		User-defined table values	New Type of Gift can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Proposal Attribute Fields

The Proposal Attribute Import is used to update or create new attributes on proposal records or to create an import file containing that information. Proposal attributes can also be created and updated through a Constituent Import or a Proposal Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	PRAttrImpID	Required to update existing	Text up to 20 characters	Import ID of proposal attribute
Category	PRAttrCat	Required to add new	User-defined table values	
Comments	PRAttrCom		Text up to 50 characters	
Gift Date	PRAttrDate		Date	
Description	PRAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Proposal Import ID	PRAttrPRImpID	Required to add new	Import ID of proposal	Link to an existing proposal on the constituent's record

## Proposal Notepad

The Proposal Notepad Import is used to update or add notes to a proposal record or to create an import file containing proposal note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Author	PRNoteAuth			
Gift Date	PRNoteDate	Required to create import file		
Description	PRNoteDesc			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Notepad Import ID	PRNoteImpID	Required to create import file		
Notes	PRNoteNotes			
Proposal Import ID	PRLink			
Title	PRNoteTitle			
Gift Type	PRNoteType	Required to create import file		

## Proposal Solicitor Fields

The Proposal Solicitor Import is used to add solicitors to constituent proposals or to create an import file of proposal solicitors. Solicitors for constituent proposals can also be added through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Proposal Import ID	PRSolPRImpID	Required to add new	Text up to 20 characters	
Solicitor Import ID	PRSolImpID	Required to add new	Import ID of existing solicitor	Link to a constituent who is a solicitor

**Note:** This import type is only available to add new solicitors to a proposal record, not to update existing.

## Prospect Financial Information Fields

The Prospect Financial Information Import is used to update or create new financial information for constituent prospects or to create an import file containing that information. Prospect financial information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	PFIAMt		Currency	
Bank Import ID	PFIImpID	Required to update existing	Text up to 20 characters	Import ID of Financial Information
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Date Acquired	PFIDateAcq		Date	Fuzzy date allowed
Date Assessed	PFIDateAss		Date	Fuzzy date allowed
Information Source	PFISource		User-defined table values	New Information Sources can be added to table during import if checkbox is on
Information Type	PFIType	Required to add new	User-defined table values	New Financial Data Types can be added to table during import if checkbox is on
Notes	PFINotes		Text	Memo field

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Prospect Other Gift Fields

The Prospect Other Gift Import is used to update or create new “gifts to other organizations” for constituent prospects or to create an import file of prospects’ gifts to other organizations. Prospects’ gifts to other organizations can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	POGAmt		Currency	
Comments	POGCom		Text	Memo field
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date Given	POGDateGiven		Date	Fuzzy date allowed

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Organization Import ID	POGOrgImpID	Required, conditionally	Import ID of existing Org	Required if the other gift record in the import file needs to be linked to a constituent organization (update and new)
Organization Name	POGOrgName		Text up to 255 characters	Name of org if not linking to existing
Organization Type	POGOrgType		User-defined table values	New Organization Type can be added to table during import if checkbox is on
Other Gift Import ID	POGImpID	Required to update existing	Text up to 20 characters	Import ID of Prospect other gift
Reason	POGReason		Text up to 50 characters	

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Prospect Philanthropic Interests Fields

The Prospect Philanthropic Interests Import is used to create new philanthropic interests for constituent prospects, or to create an import file containing that information. Prospect philanthropic interests can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	PPICom		Text	Memo field
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		
Interest Code	PPICode	Required to add new	User-defined table values	New Prospect Interests can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

**Note:** This import type is available only to add additional philanthropic interests to a constituent record, not to update existing.

## Prospect Rating Fields

The Prospect Rating Import is used to update or create new prospect ratings for constituent prospects or to create an import file of prospect ratings. Prospect ratings can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Category	PRateCat	Required to add new	User-defined table values	New Ratings can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Gift Date	PRateDate		Date	
Description	PRateDesc		Text up to 50 characters	
Notes	PRateNotes		Text up to 255 characters	
Rating Import ID	PRateImpID	Required to update existing	Text up to 20 characters	Import ID of existing Constituent Rating
Source	PRateSource		User-defined table values	New Sources can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Prospect Will Not Give To Fields

The Prospect Will Not Give To Import is used to create interests that a constituent prospect will not give to or to create an import file containing that information. Interests that prospects will not give to can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	PWNGCom		Text	Memo field

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Interest Code	PWNGCode	Required to add new	User-defined table values	New Prospect Interests can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents.. The other two fields are ignored.

**Note:** This import type is available only to add additional "will not give" codes to a constituent record, not to update existing entries.

## Solicit Code Fields

The Solicit Code Import is used to create solicit codes for constituents or to create an import file of constituents' solicit codes. Solicit codes for constituents can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		
Solicit Code	SolCode	Required to add new	User-defined table values	New Solicit Codes can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

**Note:** This import type is only available to add additional solicit codes to a constituent record, not to update existing.

## Solicitor Goal Fields

The Solicitor Goal Import is used to create new solicitor goals for a constituent that is a solicitor or to create an import file of solicitor goals. Solicitor goals can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	CSGAmt		Currency	
Campaign	CSGCampID	Required, conditionally	ID of existing Campaign	Required if importing solicitor goals where Type = Campaign
Category	CSGCat		User-defined table values	Only imported if Type = Unspecified; New Solicitor Goal Categories can be added to table during import if checkbox is on
Constituent Import ID	ImportID	* See note at end of table		
Constituent ID	ConsID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Fund	CSGFundID	Required, conditionally	ID of existing Fund	Required if importing solicitor goals where Type = Fund
Notes	CSGNotes		Text	Memo field
Reports to Individual	CSGReportsToIndiv		Import ID of Solicitor	Link to an existing solicitor; Only imported if Type = Campaign or Fund; Creates exception if Solicitor named here is not an existing Solicitor for the specified Campaign or Fund

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Reports to Team	CSGReportsToTeam			
Gift Type	CSGType	Required to add new	Campaign, Fund, Unspecified	Default = Campaign

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Spouse Fields

The Spouse Import is used to create new spouse records, update existing spouse records, or create an import file of spouse information. Spouses can also be created or updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	SRAck			
Automatically Soft Credit Gifts	SRAutoSoftCredit			
Birth Date	SRBday		Date	
Constituent ID	ConsID	* See note at end of table	Text up to 20 characters	
Import ID	ImportID	* See note at end of table	Text up to 20 characters	
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table	Numeric up to 9 digits	<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Contact Type	SRContactType		Text	
Date From	SRFromDate		Date	
Date To	SRTToDate		Date	
Deceased	SRDeceased		Yes, No, True, False, Y, N, T, F	Default = No; Only imported for Individuals; Deceased date available only if this is Yes
Deceased Date	SRDecDate		Date	Only imported for Individuals; Available only if Deceased = Yes

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Do Not Mail to Contact	SRNoMail		Yes, No, True, False, Y, N, T, F	Default=No; Not available unless Is contact = Yes
First Name	SRFirstName			
Gender	SRGender		Male, Female, Unknown	Default = Unknown; Only imported for Individuals
Is Contact	SRIsContact		Yes, No, True, False, Y, N, T, F	Default = No
Is Employee	SRIsEmp		Yes, No, True, False, Y, N, T, F	Default = No
Is Head of Household	SRIsHH		Yes, No, True, False, Y, N, T, F	Default = No
Is Primary	SRIsPrimary		Yes, No, True, False, Y, N, T, F	Default = No
Last Name	SRLastName	Required to add new individual	Text up to 50 characters	Only imported for Individuals
Maiden Name	SRMaidName		Text up to 50 characters	Only imported for Individuals
Middle Name	SRMidName		Text up to 50 characters	Only imported for Individuals;
Nickname	SRNickName		Text up to 50 characters	Only imported for Individuals
Notes	SRNotes		Text	Memo field
Position	SRPos			
Primary Addressee Editable	SRPrimAddEdit	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required if adding an editable addressee for the constituent
Primary Addressee ID Number	SRPrimAddID	Required, conditionally	Numeric – ID number of Add/Sal formula as set up in configuration.	Required to add a new Primary Addressee for the constituent
Primary Addressee Text	SRPrimAddText	Required, conditionally	Text up to 255 characters	Required if adding an editable addressee for the constituent (PrimAddEdit=Yes)
Primary Salutation Editable	SRPrimSalEdit	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required if adding an editable salutation for the constituent

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Primary Salutation ID Number	SRPrimSalID	Required, conditionally <b>NOTE</b> – even if adding an editable add/sal (text) this field must contain a valid Add/Sal ID number; any ID number will do as long as it's a valid one from configuration	Numeric – ID number of Add/Sal formula as set up in configuration	Required to add a new Primary Salutation for the constituent
Primary Salutation Text	SRPrimSalText	Required, conditionally	Text up to 255 characters	Required if adding an editable salutation for the constituent (PrimSalEdit=Yes)
Print Organization	SRPrintOrg			
Print Position	SRPrintPos			
Profession	SRProf			
Reciprocal	SRRecip			
Relationship	SRRelat			
Relationship Import ID	SRImpID	Required to update		Import ID of the spouse
Relationship Link	SRLink	Required when importing new spouses to an existing constituent		
SSN	SRSSNum		Numeric up to 9 digits	Must be unique; Only imported for Individuals; If 9 digits, is auto-formatted as ###-##-####; <b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Suffix 1	SRSuff1		User-defined code table values	New Suffixes can be added to table during import if checkbox is on; Only imported for Individuals
Suffix 2	SRSuff2		User-defined code table values	New Suffixes can be added to table during import if checkbox is on; Only imported for Individuals
Title 1	SRTit1		User-defined code table values	New Titles can be added to table during import if checkbox is on; Only imported for Individuals
Title 2	SRTit2		User-defined code table values	New Titles can be added to table during import if checkbox is on; Only imported for Individuals

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Spouse Address Fields

The following tab lists all Spouse Address Fields available for individual spouse imports (a branch of the Spouse field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Lines	SAAddrLines		Text up to 150 characters; /n is used to denote a CR-LF in this field	All address lines in one field; * See note at end of table
CART	SAAddrCART		Text up to 10 characters	
City	SAAddrCity		Text up to 50 characters	* See note at end of table

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Country	SAddrCountry		User-defined table values	New Country can be added to Configuration table during import if checkbox is on
County	SAddrCounty		User-defined table values	New Counties can be added to table during import if checkbox is on
Date From	SAddrDateFrom		Date	
Date To	SAddrDateTo		Date	
DPC	SAddrDPC		Numeric – 2 digits	US only
Information Source	SAddrInfoSrc		User-defined table values	New Address Info Sources can be added to table during import if checkbox is on
LOT	SAddrLOT		Text up to 5 characters with 1st character = A or D and last 4 characters numeric	
NZ City	SAddrNZCity		User-defined table values	New city information can be added to tables during import if checkbox is on
NZ Suburb	SAddrNZSuburb		User-defined table values	New suburb information can be added to tables during import if checkbox is on
Region	SAddrRegion		User-defined table values	New Regions can be added to table during import if checkbox is on
Seasonal Address	SAddrSeasonal	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required to be set=Yes if adding new seasonal address. Default=No
Seasonal From	SAddrSeaFrom	Required, conditionally	Month/Day	Required if adding new seasonal address

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Seasonal To	SAAAddrSeaTo	Required, conditionally	Month/Day	Required if adding new seasonal address
Send Mail	SAAAddrSendMail		Yes, No, True, False, Y, N, T, F	Default = Yes
State/Province (for Canada)	SAAAddrState		User-defined table values	New States can be added to table during import if checkbox is on; * See note at end of table
Address Type	SAAAddrType		User-defined table values	New Address Types can be added to table during import if checkbox is on
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	SAAAddrZIP		Text up to 12 characters	US only; Formats nine-digit zip codes to zip +4 if no hyphen is present in the import file; * See note at end of table

\*Spouse addresses are imported according to the rules stated below. These rules apply when importing new and updating existing records. In some cases, links that currently exist between addresses in the database may be broken through import.

- The following is true for address information imported for a spouse:

If the relationship is new (imported as new), the relationship's address information is automatically linked to the constituent's preferred address record. The import does not change this link. Any address information included in the relationship import file overwrites the relationship's constituent preferred address. If no address information is included in the relationship import file, neither the relationship's address nor the constituent's preferred address change since they are linked.

If a relationship exists (imported as an update), relationship's address retains whatever links exist. Any address information included in the relationship import file updates the relationship's address along with all linked addresses. If no address information is included in the relationship import file, the relationship's address and all linked addresses are unchanged.

- The following is true for address information imported for a Spouse Relationship (non-constituent) to an Individual:

If the relationship exists (imported as an update), the relationship's address does **NOT** retain any links previously created. Any address information included in the relationship import file is imported as the relationship's address only. If no address information is included in the relationship import file, the relationship's address is unchanged, as are all other addresses previously linked. Any existing links to this address are broken.

## Spouse Business Fields

The Spouse Business Import is used to create new spouse business relationships, update existing spouse business relationships, or create an import file of spouse business relationship information. Spouse business relationships can also be created or updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	SBAck		Yes, No, True, False, Y, N, T, F	Default = No
Automatically Soft Credit Gifts	SBAutoSoftCredit		Yes, No, True, False, Y, N, T, F	Default = No
Contact Type	SBContactType		User-defined table values	New Contact Types can be added to table during import if checkbox is on; Not available unless Is Contact = Yes
Date From	SBDateFrom		Date	Date from must be on or before Date to; Fuzzy date allowed
Date To	SBDateTo		Date	Date to must be on or after Date from; Fuzzy date allowed
Do Not Mail to Contact	SBNoMail		Yes, No, True, False, Y, N, T, F	Default = No; Not available unless Is contact = Yes
Fiscal Year Starts (US)/Financial Year Starts (UK)	SBFiscalYear		MM/DD	Not available if Org matches gifts = No
Income	SBIncome		User-defined table values	New Incomes can be added to table during import if checkbox is on
Industry	SBIndustry		User-defined table values	New Industries can be added to table during import if checkbox is on
Is Contact	SBIsContact		Yes, No, True, False, Y, N, T, F	Default = No
Is Primary	SBIsPrimary		Yes, No, True, False, Y, N, T, F	Default = No
Match Notes	SBMtcNotes		Text	Memo field
Matching Gift Factor	SBMtcFactor		Numeric up to 9,999,999,999	
Max Match Annual	SBMaxMtcAnn		Currency	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Max Match Per Gift	SBMaxMtcGift		Currency	
Max Match Total	SBMaxMtcTot		Currency	
Min Match Annual	SBMinMtcAnn		Currency	
Min Match Per Gift	SBMinMtcGift		Currency	
Min Match Total	SBMinMtcTot		Currency	
Notes	SBNotes		Text	Memo field
Organization Matches Gifts	SBOrgMatchesGifts		Yes, No, True, False, Y, N, T, F	Default = No
Organization Name	SBOrgName	Required, conditionally		Required if business being added is not an existing constituent organization
Position	SBPos		Text up to 50 characters	
Print Organization	SBPrintOrg		Yes, No, True, False, Y, N, T, F	Default = No
Print Position	SBPrintPos		Yes, No, True, False, Y, N, T, F	Default = No
Profession	SBProf		User-defined table values	New Professions can be added to table during import if checkbox is on
Reciprocal	SBRecip		User-defined table values	New Relationships can be added to table during import if checkbox is on
Relationship	SBRelat		User-defined table values	New Relationships can be added to table during import if checkbox is on
Relationship Import ID	SBImpID	Required to update existing	Text up to 20 characters	Import ID of spouse organization relationship

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Link	SBLink	Required, conditionally	Import ID of constituent	Required if the import file contains new organizational relationships for existing organizations when imported back into <i>The Raiser's Edge</i>
Spouse Relationship Import ID	SBSRImpID	Required		Import ID of the spouse

**Note:** Name information imported for an organization relationship who is also a constituent overwrites the constituent's name.

## Spouse Education/School Fields

The Spouse Education/School Import is used to update or create educational information for spouses or to create an import file containing that information. Spouse educational information for constituents and individuals can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Campus	SECampus		Text up to 50 characters	
Class of	SEClassOf		Numeric up to 4 digits	
Date Entered	SEDateEnt		Date	Date entered must be on or before Date graduated and date left; Fuzzy date allowed
Date Graduated	SEDateGrad		Date	Date graduated must be on or after Date entered; Fuzzy date allowed
Date Left	SEDateLeft		Date	Date left must be on or after Date entered; Fuzzy date allowed
Degree	SEDegree		User-defined table values	New Degrees can be added to table during import if checkbox is on
Faculty	SEFaculty			UK only
Fraternity/Sorority	SEFrat		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
GPA	SEGPA		Numeric up to 4 digits	Decimal numbers allowed
Known Name	SEKnownName		Text up to 50 characters	
Notes	SENotes		Text	Memo field
Primary Alumni	SEPrimAlum		Yes, No, True, False, Y, N, T, F	Default = No;
School Name	SESchoolName	Required to add new	User-defined table values	New Schools can be added to table during import if checkbox is on
Spouse Education Import ID	SEImpID	Required to update existing	Text up to 20 characters	Import ID of Education/School Relationship
Spouse Relationship Import ID	SESRImpID	Required	Import ID of existing Individual relationship	Relationship Import ID of Spouse records for which the education/school information is being added/updated
Status	SEStatus		User-defined table values	New Education Status can be added to table during import if checkbox is on
Subject of Study	SESubject			UK only
School Type	SEType		User-defined table values	New School Types can be added to table during import if checkbox is on

## Spouse Phone Fields

The Spouse Phone Import is used to update or create spouse phone information or to create an import file containing that information. Spouse phone information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Import ID	SPPhoneIRImpID	Required		*Relationship Import ID of the Spouse whose phone number is being updated/added
Phone Import ID	SPPhoneImpID	Required to update existing	Text up to 20 characters	Import ID of the Spouse whose phone number is being updated This field can be blank for new phone numbers; must be populated for updating existing phone numbers
Phone Number	SPPhoneNum		Text up to 100 characters	No formatting performed during import
Phone Type	SPPhoneType	Required to add new	User-defined table values	New Phone Types can be added to table during import if checkbox is on

## Tribute Fields

The Tribute Import is used to update or create new tributes for constituents that are honor/memorials or to create an import file containing that information. Tributes can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date From	TRDateFrom		Date	Fuzzy date allowed; Date from must be on or before date to
Date To	TRDateTo		Date	Fuzzy date allowed; Date to must be on or after date from
Default Fund	TRDefaultFund			
Description	TRDesc		Text up to 50 characters	
Gifts May be Given	TRGiftGiven		Yes, No, True, False, Y, N, T, F	Default = No
Notes	TRNotes		Text	Memo field
Tribute Import ID	TRImpID	Required to update existing	Text up to 20 characters	Import ID of a Constituent Tribute
Tribute Type	TRType	Required to add new	User-defined table values	New Tribute Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Volunteer Fields

The Volunteer Import is used to create new volunteer information for constituents or to create an import file of volunteer information. Volunteer information can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Emergency Name	VEmerName		Text up to 50 characters	
Emergency Phone	VEmerPhone		Text up to 50 characters	
Emergency Relation	VEmerRel		User-defined table values	New Relationships can be added to table during import if checkbox is on
Future Award	VFutureAward		User-defined table values	New Award can be added to table during import if checkbox is on
Future Award Comments	VFutureAwardCom		Text up to 50 characters	
Mandate Address	VMandateAddr		Text up to 150 characters	
Mandate Agency	VMandateName		Text up to 50 characters	
Mandate Comments	VMandateCom		Text up to 255 characters	
Mandate Complete Date	VMandateCmplDate	Required to link to existing Org	Date	Fuzzy date allowed
Mandate Contact	VMandateContact		Text up to 20 characters	
Mandate Hours	VMandateHours		Numeric up to 99,999	
Mandate Phone	VMandatePhone		Text up to 50 characters	
Mandate Start Date	VMandateStart		Date	Fuzzy date allowed
Vehicle Available	VVehicleAvail		Yes, No, True, False, Y, N, T, F	Default = No
Vehicle Comments	VVehicleCom		Text up to 50 characters	Available only if Vehicle Available = Yes

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Vehicle Type	VVehicleType		User-defined table values	New Volunteer Vehicle Type can be added to table during import if checkbox is on; Available only if Vehicle Available = Yes

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Assignment Interest Fields

The Volunteer Assignment Interest Import is used to update or create new assignment interests for constituents that are volunteers or to create an import file containing that information. Assignment interests for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Assignment Interest	VAllInterest	Required to add new	User-defined table values	New Assignments can be added to table during import if checkbox is on
Assignment Interest import ID	VAllImpID	Required to update existing	Text up to 20 characters	Import ID of Assignment Interest
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Availability Fields

The Volunteer Availability Import is used to update or create new availability information for constituents that are volunteers or to create an import file containing that information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Availability Import ID	VAvailImpID	Required to update existing	Text up to 20 characters	Import ID of Availability
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date From	VAvailFromDate	Required to add new	MM/DD	
Date To	VAvailToDate	Required to add new	MM/DD	
Day	VAvailDay		Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, All Week, Weekdays, Weekends	
End Time	VAvailEndTime	Required, conditionally	Time	Required if you enter an End Time
Start Time	VAvailStartTime	Required, conditionally	Time	Required if you enter a Start Time

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Award Fields

The Volunteer Awards Import is used to update or create new awards for constituents that are volunteers or to create an import file of volunteer awards. Awards for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Award	VAward		User-defined table values	New Awards can be added to table during import if checkbox is on
Award Import ID	VAwardImpID	Required to update existing	Text up to 20 characters	Import ID of Award
Comments	VAwardCom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Gift Date	VAwardDate		Date	
Presented By	VAwardPresentBy		Text up to 50 characters	
Presented With	VAwardPresentWith		Text up to 50 characters	

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Checklist Fields

The Volunteer Checklist Import is used to update or create new checklist items for constituents that are volunteers or to create an import file of volunteer checklist items. Checklist items for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Checklist Import ID	VCLImpID	Required to update existing	Text up to 20 characters	Import ID of checklist item

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Checklist Item	VCLItem		User-defined table values	New Checklist Items can be added to table during import if checkbox is on
Comments	VCLCom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date Completed	VCLDateCompl		Date	Fuzzy date allowed
Date Requested	VCLDateReq		Date	Fuzzy date allowed
Letter	VCLLetter		User-defined table values	New Volunteer Checklist Letters can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Courses/Training Fields

The Volunteer Courses/Training Import is used to update or create new courses and training information for constituents that are volunteers or to create an import file containing that information. Courses and Training information for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Certification	VCTCert		User-defined table values	New Certifications can be added to table during import if checkbox is on
Comments	VCTCom		Text up to 50	
Constituent ID	ConsID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Course	VCTCourse	Required	User-defined table values	New Volunteer Courses can be added to table during import if checkbox is on
Course Import ID	VCTImpID	Required to update existing	Text up to 20 characters	Import ID of course/training
End Date	VCTEndDate		Date	
Expires	VCTExpires		Date	
Instructor	VCTInstr		Text up to 50 characters	
Start Date	VCTStartDate		Date	

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Job Assignment Fields

The Volunteer Job Assignment Import is used to update or create new job assignments for constituents that are volunteers or to create an import file of job assignments. Job assignments can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Category	VJACat		User-defined table values	New Job Category can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Day	VJADay		Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, All Week, Weekdays, Weekends	
Department	VJADept		User-defined table values	New Departments can be added to table during import if checkbox is on
End Date	VJAEndDate		Date	End date must be on or after start date
End Time	VJAEndTime		Time	
Job Assignment Import ID	VJAImpID	Required to update existing	Text up to 20 characters	Import ID of job assignment
Job Import ID	VJAJobImpID	Required to add new	Import ID of Job	Link to existing Job
Letter Sent	VJALtrSent			
Letter Sent On	VJALtrSentOn			
Location	VJALocation		User-defined table values	New Locations can be added to table during import if checkbox is on
Notes	VJANotes			
Position	VJAPosition		Text up to 50 characters	
Requested On	VJAReqOn			
Start Date	VJAStartDate		Date	Start date must be on or before end date
Start Time	VJAStartTime		Time	
Status	VJAStatus			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Supervisor	VJASuper		Text up to 50 characters	
Task	VJATask		User-defined table values	New Job Task can be added to table during import if checkbox is on
Volunteer Type	VJAType		User-defined table values	New Volunteer Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Volunteer Medical Information Fields

The Volunteer Medical Information Import is used to update or create new medical information for constituents that are volunteers or to create an import file containing that information. Volunteer medical information can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	VMICom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Gift Date	VMIDate		Date	Fuzzy date allowed
Description	VMIDesc		User-defined table values	New Volunteer Medical Info can be added to table during import if checkbox is on
Medical Information Import ID	VMIImpID	Required to update existing	Text up to 20 characters	Import ID of Medical Information

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Volunteer Skills and Experience Fields

The Volunteer Skills and Experience Import is used to update or create skills and experience information for constituents that are volunteers or to create an import file containing that information. Skills and experience information for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	VSECom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Description	VSEDesc		User-defined table values	New Volunteer Skills can be added to table during import if checkbox is on
Expires	VSEExpires		Date	Fuzzy date allowed
License Number	VSELicenseNum		Text up to 50 characters	
License Type	VSELicenseType		User-defined table values	New Volunteer License Types can be added to table during import if checkbox is on
Skill Import ID	VSEImpID	Required to update existing	Text up to 20 characters	Import ID of Skill/Experience
Skill Level	VSESkillLevel		User-defined table values	New Volunteer Skill Levels can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Special Need Fields

The Volunteer Special Need Import is used to update or create special needs for constituents that are volunteers or to create an import file of volunteers' special needs. Special needs for volunteers can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	VSNCom		Text up to 50 characters	
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Description	VSNDesc		User-defined table values	New Volunteer Special Needs can be added to table during import if checkbox is on
Special Needs Import ID	VSNImpID	Required to update existing	Text up to 20 characters	Import ID of Special Needs

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

## Volunteer Time Sheet Fields

The Volunteer Time Sheet Import is used to update or create new time sheets for constituents that are volunteers or to create an import file of time sheets. Time sheets can also be created and updated through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Apply to Mandate	VTSApplyMandate		Yes, No, True, False, Y, N, T, F	Default = No
Category	VTSCat		User-defined table values	New Job Category can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Gift Date	VTSDate	Required to add new	Date	
Department	VTSDept		User-defined table values	New Departments can be added to table during import if checkbox is on
Hourly Wage	VTShrlyWage		Currency	
Hours	VTShours		Numeric up to 9,999,999,9999	
Job Import ID	VTSJobImpID		Import ID of existing Job	Link to Job
Location	VTSLocation		User-defined table values	New Locations can be added to table during import if checkbox is on
Notes	VTSNotes		Text up to 255 characters	
Position	VTSPosition		Text up to 50 characters	
Task	VTSTask		User-defined table values	New Job Task can be added to table during import if checkbox is on
Time Sheet Import ID	VTSImpID	Required to update existing	Text up to 20 characters	Import ID of Time Sheet
Volunteer Type	VTSVolType		User-defined table values	New Volunteer Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Volunteer Type Fields

The Volunteer Type Import is used to create volunteer type information for constituents that are volunteers or to create an import containing that information. Volunteer type information can also be created through a Constituent Import.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
End Date	VTEndDate		Date	Fuzzy date allowed
Reason Finished	VTReasonFin		Text up to 50 characters	
Start Date	VTStartDate		Date	Fuzzy date allowed
Status	VTStatus		User-defined table values	New Volunteer Status can be added to table during import if checkbox is on
Volunteer Type	VTType		User-defined table values	New Volunteer Types can be added to table during import if checkbox is on

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Event Imports

Using **Import**, you can import new events into *The Raiser's Edge*, update existing event records, or create an import file of event records.

The list below shows the available import types for importing events. Each of these is a separate import type. The tables below the list show the fields that display for each import type.

- Dinner Preference
- Event

- Event Attribute (also available as part of an Event import)
- Event Award
- Event Expense
- Event Menu Items
- Event Notepad
- Event Price
- Guest
- Guest Alias
- Other Donation
- Participant
- Participant Address Attribute (also available as part of a Participant Address import)
- Participant Alias
- Participant Attribute (also available as part of a Participant import)
- Participant Benefit
- Participant Job
- Participant Phone
- Registration Fee
- Sponsoring Pledge

## Dinner Preference Fields

The Dinner Preference Import is used to update or create dinner preference information in event records or to create an import file containing dinner preference information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	REGDPCom		Text	Memo field
Dinner Preference	EVMenuItem	Required	Text	
Dinner Preference Import ID	REGDPImpID	Required to update existing	Text up to 20 characters	
Participant Import ID	REGImpID	Required to add new <b>and</b> update existing	Import ID of existing Participant	Link to Participant; Creates exception if participant does not match participant of dinner preference being updated
Quantity	REGDPQuantity		Numeric up to 9999 (must be > 0)	Default = 0

## Event Fields

The Event Import is used to update or create event records or to create an import file containing event record information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Campaign	CampID			
Capacity	EVCapacity		Numeric up to 999,999	
Category	EVCat		Sporting event, Dinner, Class, or Other	
Description	EVDesc		Text up to 255 characters	
Display On Calendar	EVDispOnCal		Yes, No, True, False, Y, N, T, F	
End Date	EVEndDate		Date	Not imported if Category = Class
End Time	EVEndTime		Time	Not imported if Category = Class
Event ID	EventID	Required to add new (unless Business Rule to auto-generate Event ID is turned on) <b>and</b> to update existing	Text up to 50 characters	Must be unique
Goal	EVGoal		Currency	
Group	EVGroup		User-defined table values	New Special Event Groups can be added to table during import if checkbox is on
Is Inactive	EVInactive		Yes, No, True, False, Y, N, T, F	Defaults to False
Itinerary Description	EVItinDesc		Text up to 255 characters	
Location Address Lines	EVLocAddr		Text up to 150 characters	
Location City	EVLocCity		Text up to 50 characters	
Location Contact	EVLocContact		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Location Country	EVLocCountry		User-defined table values	New Country can be added to Configuration table during import if checkbox is on
Location Name	EVLoc	Required to add new	Text up to 50 characters	
Location Notes	EVLocNotes		Text up to 255 characters	
Location Phone	EVLocPhone		Text up to 50 characters	
Location State	EVLocState		User-defined table values	New States can be added to table during import if checkbox is on
Location ZIP	EVLocZIP		Text	ZIP (US) / Post Code (UK, Aus, Can, NZ)
Name	EVName	Required to add new	Text up to 50 characters	
Number Invited	EVNumInvit		Numeric up to 999,999	
Start Date	EVStartDate		Day	Not imported if Category = Class
Start Time	EVStartTime		Time	Not imported if Category = Class
Gift Type	EVType		User-defined table values	New Special Event Types can be added to table during import if checkbox is on

## Event Attribute Fields

The Event Attribute Import is used to update or create attributes on event records or to create an import file containing event attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	EVAttrImpID	Required to update existing	Text up to 20 characters	Import ID of event attribute
Category	EvAttrCat	Required to add new	User-defined table values	Must be existing Event Attribute Category
Comments	EVAttrCom		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Date	EVAAttrDate		Date	
Description	EVAAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Event Import ID	EventID	* See note at end of table	Event ID of existing event	Link to Event; Creates exception if event does not match event of attribute being updated

\*This field is available only for event attribute imports. If available, this field is required to add new records.

## Event Award Fields

The Event Award Import is used to update or create awards on event records or to create an import file containing event award information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Award	EVAward	Required	User-defined table values	New Event Awards can be added to table during import if checkbox is on
Award Import ID	EVAwardImpID	Required to update existing	Text up to 20 characters	
Comments	EVAwardCom		Text up to 50 characters	
Event ID	EventID	Required to add new <b>and</b> update existing	Event ID of existing event	Link to Event; Creates exception if event does not match event of award being updated
Presented By	EVAwardPresenter		Text up to 50 characters	
Recipient Import ID	EVAwardRecipient	Required to add new	Import ID of participant receiving award	Link to existing Participant; must be registered for this event

## Event Expense Fields

The Event Expense Import is used to update or create expenses on event records or to create an import file containing event expense information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	EVExpAmt		Currency	
Amount Paid	EVExpPaidAmt		Currency	
Budgeted Amount	EVExpBudAmt		Currency	
Comments	EVExpCom		Text up to 255 characters	
Gift Date	EVExpDate		Date	
Event ID	EventID	Required to add new and update existing	Event ID of existing event	Link to Event; Creates exception if event does not match event of expense being updated
Expense Import ID	EVExpImpID	Required to update existing	Text up to 20 characters	
Gift Type	EVExpType	Required	User-defined table values	New Special Event Expenses can be added to table during import if checkbox is on
Vendor	EVExpVendor		Import ID of existing Registrant who is a Vendor	Link to Registrant; Must be a vendor for the event

## Event Menu Item Fields

The Event Menu Item Import is used to update or create menu items on event records or to create an import file containing event menu item information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Event ID	EventID	Required to add new	Event ID of existing event	Link to Event; Creates exception if event does not match event of attribute being updated
Menu Item	EvMenuitem	Required to add new	User-defined table values	New Event Menu Items can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Menu Item Import ID	EVMenuItemImpID	Required to update existing	Text up to 20 characters	Import ID of event attribute

## Event Notepad Fields

The Event Notepad Import is used to update or create notes on event records or to create an import file containing event note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Author	EVNoteAuthor		Text up to 50 characters	
Gift Date	EVNoteDate	Required to add new	Date	
Description	EVNoteDesc		Text up to 255 characters	
Event ID	EventID	Required to add new <b>and</b> update existing	Event ID of existing event	Link to Event; Creates exception if event does not match event of notepad being updated
Notepad Import ID	EVNoteImpID	Required to update existing	Text up to 20 characters	Event notepad import ID
Notepad	EVNoteNotes	Required	Memo field	
Title	EVNoteTitle		Text up to 50 characters	
Gift Type	EVNoteType	Required to add new	User-defined table values	New Event Notepad Types can be added to table during import if checkbox is on

## Event Price Fields

The Event Price Import is used to update or create price information on event records or to create an import file containing event price information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	EVPriceCom		Text up to 255 characters	
Event ID	EventID	Required to add new and update existing	Event ID of existing event	Link to Event; Creates exception if event does not match event of price being updated

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	EVPriceGiftAmt		Currency	
Price Import ID	EVPriceImpID	Required to update existing	Text up to 20 characters	
Receipt Amount	EVPriceRcptAmt		Currency	
Unit	EVPriceUnit	Required	User-defined table values	New Special Event Units can be added to table during import if checkbox is on

## Guest Fields

The Guest Import is used to update or create guest information on event records or to create an import file containing event guest information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attended	GuestAttended		Yes, No, True, False, Y, N, T, F	Default = No
Constituent Import ID	ImportID	Required, conditionally	Import ID of existing constituent	Required if you import a guest who is also an existing constituent.
Do Not Seat	GuestDoNotSeat			
First Name	GuestFirstName		Text up to 50 characters	
Guest Import ID	GuestImpID	Required to update existing	Text up to 20 characters	
Guest Of	REGImpID	Required to link to existing registrant	Import ID of existing Registrant	Link to Registrant
Is Participant	GuestIsPart	Required, conditionally	Yes, No, True, False, Y, N, T, F	Required if you import a guest who is not a constituent and you want to add this guest without making them a participant. Default = Yes; Required to be set to No if you do not want to make the guest a participant.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Key Indicator	GuestKeyInd	Required, conditionally	I, O	Required if you import a guest who is not an existing constituent; If guest is linked to a constituent, and value in this field does not match constituent record, record will create an exception.
Last Name	GuestLastName	Required, conditionally	Text up to 50 characters	Required if you import a guest who is an individual and not an existing constituent
Middle Name	GuestMidName		Text up to 50 characters	
Number of Guests	GuestNum		Numeric up to 9999	Must be one (1) if Participant = Yes
Organization Name	GuestOrgName	Required, conditionally	Text up to 50 characters	Required if you import a participant who is an organization and not an existing constituent
Registration	GuestReg		Registered, Not Registered, Do Not Register	Default = Not Registered
Registration Date	GuestRegDate		Date	Imported only if Registration = Registered
Suffix 1	GuestSuff1		User-defined table values	New Suffixes can be added to table during import if checkbox is on
Suffix 2	GuestSuff2		User-defined table values	New Suffixes can be added to table during import if checkbox is on
Title 1	GuestTitl1		User-defined table values	New Titles can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Title 2	GuestTitl2		User-defined table values	New Titles can be added to table during import if checkbox is on

**Note:** Name information imported for a participant who is a constituent overwrites the constituent's name if data is imported in these fields.

## Guest Alias Fields

The Guest Alias Import is used to create guest alias information on event records or to create an import file containing event guest alias information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Alias Name	GuestAliasName	Required		
Alias Type	GuestAliasType		User-defined table values	New Alias Types can be added to table during import if checkbox is on
Guest Import ID	GuestImpID	Required to add new	Import ID of existing Guest	

**Note:** You can import aliases; they cannot be updated. If aliases are added for a guest who is a constituent, the aliases are also added to the constituent's record.

## Other Donation Fields

The Other Donation Import is used to create other donation information on event records or to create an import file containing event other donation information. An other donation is a gift, other than a registration fee, given to an event.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Import ID	GFImpID	Required	Text up to 20 characters	Import ID of gift to be linked to this participant record
Participant Import ID	REGImpID	Required	Import ID of existing Participant	

**Note:** This import type is available only to add new donations to a participant's record, not to update existing

## Participant Fields

The Participant Import is used to update or create participant records or to create an import file containing participant record information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Amount Paid	REGAmtPaid		Currency	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attended	REGAttended		Yes, No, True, False, Y, N, T, F	Default = No
Benefit Notes	REGBenNotes		Text	Memo field
Constituent Import ID	ImportID	Required, conditionally	Import ID of existing constituent	Required if you import a participant who is also an existing constituent
Contact	REGContact		Text up to 50 characters	
Coordinator	REGCoord		Yes, No, True, False, Y, N, T, F	Default = No
Date Paid	REGDatePaid		Date	
Do Not Seat	REGDoNotSeat		Yes, No, True, False, Y, N, T, F	Default = No
Event ID	EventID	Required to add new	Event ID of existing event	Link to Event; Create exception if event does not match event of participant being updated
First Name	REGFirstName		Text up to 50 characters	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID
Grade	REGGrade		Text up to 50 characters	Only imported if Event Category = Class
Group Notes	REGGroupNotes		Text	Memo Field
Guest Of	REGGuestOf		Import ID of existing Registrant for this event – Note: this is a Registrant Import ID, not a Constituent Import ID	Only valid for Guest; must be an <b>existing</b> registrant of this event
Instructor	REGInstructor		Yes, No, True, False, Y, N, T, F	Default = - No
Invitation	REGInvite		Do not invite, Not invited, Invited	Default = Not invited
Invitation Date	REGInviteDate		Date	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Key Indicator	REGKeyInd	Required	I, O	Ignored if Constituent Import ID field has existing constituent ID, but the Key Indicator field must be present in the import file
Last Name	REGLastName	Required, conditionally	Text up to 50 characters	Required if you import a participant who is an individual and not an existing constituent. Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID; * See note at end of table
Middle Name	REGMidName		Text up to 50 characters	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID.
Notes	REGNotes		Text	Memo field
Organization Name	REGOrgName	Required, conditionally	Text up to 50 characters	Required if you import a participant who is an organization and not an existing constituent. Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID.
Participant Import ID	REGImpID	Required to update existing	Text up to 20 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Participation	REGParticipation		User-defined table values	New Participant Types can be added to table during import if checkbox is on
Registration	REGRegistration		Registered, Not Registered, Do Not Register	Default = Not Registered
Registration Date	REGRegDate		Date	
Response	REGResponse		User-defined table values	New Registration Response can be added to table during import if checkbox is on
Response Date	REGRespDate		Date	
Solicitor	REGSolicitor		Import ID of existing Solicitor	Must be existing solicitor
Speaker	REGSpeaker		Yes, No, True, False, Y, N, T, F	Default = No
Speaker Comments	REGSpeakCom		Text up to 255 characters	
Speaker Time	REGSpeakTime		Text up to 50 characters	
Speaker Topic	REGSpeakTopic		Text up to 50 characters	
Sponsored By	REGSponsor		Import ID of <b>existing</b> sponsor for this event – Note: this is a Sponsor Import ID, not a Constituent Import ID	Only valid for Registrant; Must be an <b>existing</b> sponsor of this event
Sport Ability	REGAbility		Text up to 50 characters	Only imported if Event category = Sporting event
Sport Age	REGAge		Numeric up to 999	Only imported if Event category = Sporting event
Sport Assigned Number	REGAssignedNum		Text up to 10 characters	Only imported if Event category = Sporting event

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Sport Division	REGDivision		User-defined table values	New Divisions can be added to table during import if checkbox is on; Only imported if Event category = Sporting event
Sport Gender	REGGender		Text	
Sport Height	REGHeight		Numeric up to 10 digits	Only imported if Event category = Sporting event
Sport Location	REGLocation		User-defined table values	New Sporting Event Location can be added to table during import if checkbox is on; Only imported if Event category = Sporting event
Sport Place	REGPlace		Text up to 50 characters	Only imported if Event category = Sporting event
Sport Position	REGPosition		User-defined table values	New Sporting Event Position can be added to table during import if checkbox is on; Only imported if Event category = Sporting event
Sport Team	REGTeam		User-defined table values	New Teams can be added to table during import if checkbox is on; Only imported if Event category = Sporting event
Sport Time	REGTime		Time	Only imported if Event category = Sporting event
Sport Weight	REGWeight		Numeric up to 3 digits	Only imported if Event category = Sporting event

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Status	REGStatus		User-defined table values	New Participant Status can be added to table during import if checkbox is on
Suffix 1	REGSuff1		User-defined table values	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID
Suffix 2	REGSuff2		User-defined table values	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID
Title 1	REGTit1		User-defined table values	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID
Title 2	REGTit2		User-defined table values	Value entered here may change constituent name if "Constituent import ID" field has existing constituent ID
Registration Type	REGType		Registrant, Guest, Sponsor	
Vendor	REGVendor		Yes, No, True, False, Y, N, T, F	Default = No
Vendor Booth	REGVendorBooth		Text up to 7 characters	
Vendor Comments	REGVendorCom		Text up to 255 characters	
Vendor Purpose	REGVendorPurpose		User-defined table values	New Vendor Purpose can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Vendor Rating	REGVendorRating		User-defined table values	New Vendor Rating can be added to table during import if checkbox is on
Vendor Space	REGVendorSpace		Text up to 7 characters	
Volunteer	REGVol		Yes, No, True, False, Y, N, T, F	Default = No
Waive Benefits	REGWaiveBen		Yes, No, True, False, Y, N, T, F	Default = No

## Participant Address Fields

The following table lists all Participant Address Fields available for participant imports (a branch of the participant import field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address Lines	REGAddrLines		Text up to 150 characters; /n is used to denote a CR-LF in this field	All address lines in one field
CART	REGAddrCART		Text up to 10 characters	
City (US, UK, Can)/Suburb (Aus)	REGAddrCity		Text up to 50 characters	* See note at end of table
Country	REGAddrCountry		User-defined table values	New Country can be added to Configuration table during import if checkbox is on
County	REGAddrCounty		User-defined table values	New Counties can be added to table during import if checkbox is on
Date From	REGAddrValidFrom		Date	
Date To	REGAddrValidTo		Date	
DPC	REGAddrDPC		Numeric – 2 digits	US only
DPS	REGAddrDPS		Alpha-numeric - 2 characters.	UK only
Information Source	REGAddrInfoSrc		User-defined table values	New Address Info Sources can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
LOT	REGAddrLOT		Text up to 5 characters with 1 <sup>st</sup> character = A or D and last 4 characters numeric	
NZ City	REGAddrNZCity		User-defined table values	New city can be added to tables during import if checkbox is on
NZ Suburb	REGAddrNZSuburb		User-defined table values	New suburb can be added to tables during import if checkbox is on
Region	REGAddrRegion		User-defined table values	New Regions can be added to table during import if checkbox is on
Seasonal Address	REGAddrSeasonal		Yes, No, True, False, Y, N, T, F	Default = No
Seasonal From	REGAddrSeasFrom	Required, conditionally	Month/Day	Required if you import a seasonal address
Seasonal To	REGAddrSeasTo	Required, conditionally	Month/Day	Required if you import a seasonal address
Send Mail	REGSendMail		Yes, No, True, False, Y, N, T, F	
State/Province	REGAddrState		User-defined table values	New States can be added to table during import if checkbox is on
Address Type	REGAddrType		User-defined table values	New Address Types can be added to table during import if checkbox is on
ZIP (US); Post code (NZ); Postcode (UK, Aus); Postal Code (Can)	REGAddrZIP		Text up to 12 characters	US only; Formats nine-digit zip codes to zip +4 if no hyphen is present in the import file

**Note:** Address information imported for a participant who is a constituent is always linked to the constituent's preferred address and will overwrite constituent's preferred address if data is imported in these fields.

## Participant Lodging Fields

The following table lists all Participant Lodging Fields available as part of participant imports (a branch of the participant import field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Check-In Date	REGCheckInDate		Date	
Check-In Time	REGCheckInTime		Time	
Check-Out Date	REGCheckOutDate		Date	
Check-Out Time	REGCheckOutTime		Time	
City	REGAddrCity		Text	
Confirmation Number	REGConfirmNum		Text up to 50 characters	
Lodging Name	REGLodgeName		User-defined table values	New Lodgings can be added to table during import if checkbox is on
Lodging Phone	REGLodgePhone		Text up to 50 characters	No formatting performed by RE
Lodging Room	REGLodgeRoom		Text up to 7 characters	

## Participant Tag/Card Fields

The following table lists all Participant Tag/Card Fields available as part of participant import (a branch of the participant import field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
City	REGAddrCity		Text	
Name Tag Status	REGTagStatus	Required if Print Tags = Yes	Printed, Not Printed, Lost	Default = Not Printed
Name Tag Text	REGTagText	Required, conditionally	Text up to 70 characters	Required if you want to print name tags; When importing, this field can contain only editable text; Editable checkbox automatically sets to ON when data is imported into this field
Number of Cards to Print	REGCardNumPrint	Required, conditionally	Numeric up to 9999	Required (> 0) if Print Cards = Yes
Number of Tags to Print	REGTagNumPrint	Required, conditionally	Numeric up to 9999	Required (> 0) if Print Tags = Yes

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Place Card Status	REGCardStatus	Required, conditionally	Printed, Not Printed, Lost	Required if Print Cards = Yes; Default = Not Printed
Place Card Text	REGCardText	Required, conditionally	Text up to 70 characters	Required if Print Cards = Yes; When importing, this field can contain only editable text; Editable checkbox automatically sets to ON when data is imported into this field
Print Name Tags	REGTagPrint		Yes, No, True, False, Y, N, T, F	Default = No
Print Place Cards	REGCardPrint		Yes, No, True, False, Y, N, T, F	Default = No

## Travel Information Fields

The following table lists all Travel Information Fields available as part of participant import (a branch of the participant import field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Arrival Date	REGArrivalDate			
Arrival Name	REGArrivalName			
Arrival Number	REGArrivalNum			
Arrival Time	REGArrivalTime			
Arrival Type	REGArrivalType			
Departure Date	REGDepartDate			
Departure Name	REGDepartName			
Departure Number	REGDepartNum			
Departure Time	REGDepartTime			
Departure Type	REGDepartType			

## Participant Address Attribute Fields

The Participant Address Attribute Import is used to update or create address attributes on participant records or to create an import file containing participant address attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	REGAddrAttrImpID	Required to update existing	Text up to 20 characters	Import ID of participant address attribute

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Category	REGAddrAttrCat	Required to add new	User-defined table values	Must be existing Address Attribute Category
Comments	REGAddrAttrCom		Text up to 50 characters	
Gift Date	REGAddrAttrDate		Date	
Description	REGAddrAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Participant Import ID	REGImpID	Required to add new <b>and</b> update existing	ID of existing Participant	Link to Participant; Create exception if participant does not match participant of attribute being updated

## Participant Alias Fields

The Participant Alias Import is used to create alias information on participant records or to create an import file containing participant alias information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Alias Name	REGAliasName	Required		
Alias Type	REGAliasType		User-defined table values	New Alias Types can be added to table during import if checkbox is on
Participant Import ID	REGImpID	Required to add new	Import ID of existing Participant	

**Note:** You can import new aliases; they cannot be updated. If aliases are added for a participant who is a constituent, the aliases are also added to the constituent's record.

## Participant Attribute Fields

The Participant Attribute Import is used to update or create attribute information on participant records or to create an import file containing participant attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import	REGAttrImpID	Required to update existing	Text up to 20 characters	Import ID of participant attribute
Category	REGAttrCat	Required to add new	User-defined table values	Must be existing Participant Attribute Category

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	REGAttrCom		Text up to 50 characters	
Gift Date	REGAttrDate		Date	
Description	REGAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Participant Import ID	REGImpID	* See note at end of table	ID of existing Participant	Link to Participant; Creates exception if participant does not match participant of attribute being updated

\*This field is available only for participant attribute imports. If available, this field is required to add new records.

## Participant Benefit Fields

The Participant Benefit Import is used to update or create benefit information on participant records or to create an import file containing participant benefit information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Benefit	REGBenBen	Required	Text	
Benefit Import ID	REGBenImpID	Required		
Comments	REGBenCom		Text	
Count	REGBenCount			
Participant Import ID	REGImpID	Required	Import ID of existing Participant	
Total Benefit Value	REGBenTotVal			
Unit Cost	REGBenUnitCost			

## Participant Job Fields

The Participant Job Import is used to update or create job information on participant records or to create an import file containing participant job information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Category	REGJobCat		User-defined table values	New Job Category can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Day of Week	REGJobDay		Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, All Week, Weekdays, Weekends	
Department	REGJobDept		User-defined table values	New Departments can be added to table during import if checkbox is on
End Date	REGJobEndDate		Date	
End Time	REGJobEndTime		Time	
Job Assignment Import ID	REGJobAssignImpID	Required	Text up to 20 characters	
Job Import ID	JobImpID	Required	Import ID of existing job	Link to Job; Creates exception if job does not match job of assignment being updated
Letter Sent	REGJobLtrSent			
Letter Sent On	REGJobLtrSentOn			
Location	REGJobLoc		User-defined table values	New Locations can be added to table during import if checkbox is on
Notes	REGJobNotes			
Participant Import ID	REGImpID	Required	Import ID of existing Registrant – must be a constituent	Link to a Constituent; Creates exception if constituent does not match constituent of assignment being updated
Position	REGJobPos		Text up to 50 characters	
Requested On	REGJobReqOn			
Start Date	REGJobStartDate		Date	
Start Time	REGJobStartTime		Time	
Status	REGJobStatus			
Supervisor	REGJobSuper		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Task	REGJobTask		User-defined table values	New Job Task can be added to table during import if checkbox is on
Volunteer Type	REGJobVolType		User-defined table values	New Volunteer Types can be added to table during import if checkbox is on

## Participant Phone Fields

The Participant Phone Import is used to update or create phone information on participant records or to create an import file containing participant phone information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Number	REGPhoneNum		Text up to 100 characters	No formatting performed during import
Participant Import ID	REGImpID	Required to add new	Import ID of existing Participant	Link to Participant; Creates exception if participant does not match participant of phone being updated
Phone Import ID	REGPhoneImpID	Required to update existing	Text up to 20 characters	
Gift Type	REGPhoneType	Required to add new	User-defined table values	New Phone Types can be added to table during import if checkbox is on

**Note:** Importing phone numbers for a participant who is a constituent adds the phone numbers to the constituent's preferred address

## Registration Fee Fields

The Registration Fee Import is used to create registration information on event records or to create an import file containing registration fee information.

## Registration Fees

The following table lists all fields available as part of registration fees fields (a branch of the registration fee field list)

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	REGFeeCom		Text up to 255 characters	
Gift Date	REGFeeDate		Date	
Gift Amount	REGFeeGiftAmt	Required to add new	Currency	
Gift Import ID	GFImpID			
Number of Units	REGFeeNumUnits	Required to add new	Numeric	
Participant Import ID	REGImpID	Required to add new	Import ID of existing Participant	Link to Participant; Creates exception if participant does not match participant of registration fee being updated
Receipt Amount	REGFeeRcptAmt	Required to add new	Currency	Must be < or = gift amount
Registration Unit	REGFeeUnit	Required to add new	User-defined table values	Must be a Registration Unit that has already been established for this event

## Linked Gifts

The following table lists all Linked Gift fields available as part of registration fee fields (a branch of the registration fee field list)

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Applied Amount	REGFeeAppliedAmt			
Gift Import ID	GFImpID			

## Sponsoring Pledge Fields

The Sponsoring Pledge Import is used to create sponsoring pledge information on event records or to create an import file containing sponsoring pledge information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Participant Import ID	REGImpID	Required	Import ID of existing Participant	Import ID of Participant making Sponsoring Pledge

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Pledge Import ID	GFTImpID	Required	Import ID of existing Pledge	Import ID of the gift that is the Sponsoring Pledge

**Note:** This import type is only available to add a new sponsoring pledge to a participant's record, not to update existing records.

## Fund Imports

Using **Import**, you can import new funds into *The Raiser's Edge*, update existing funds, or create an import file of fund information.

The list below shows the available import types for importing funds. Each of these is a separate import type. The tables below the list display the fields available for each import type.

- Fund
- Fund Appeal
- Fund Attribute (also available as part of a Fund import)

## Fund Fields

The Fund Import is used to update or create fund records in *The Raiser's Edge* or to create an import file containing fund record information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Apply GST to Gifts	FundApplyGST			Aus and NZ
Category	FundCat		User-defined table values	New category can be added to table during import if checkbox is on
Default Appeal	FundDefAppeal		Appeal ID	ID of an existing Appeal
Default Campaign	FundDefCamp		Campaign ID	ID of an existing Campaign
Fund Description	FundDesc	Required to add new	Unique text up to 100 characters	
End Date	FundEndDate		Date must be greater than start date if start date is present	
Fund ID	FundID	Required to add new	Unique name up to 20 characters	
Fund Type	FundType			
Is Inactive	FundInactive		Yes, No, True, False, Y, N, T, F	
Limit Appeals	FundLimitAppeal		Yes, No, True, False, Y, N, T, F	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Limit Campaigns	FundLimitCamp		Yes, No, True, False, Y, N, T, F	
Notes	FundNotes		Memo	
Overall Goal	FundGoal		Currency up to \$1,000,000,000.00	
Restricted	FundRestricted		Yes, No, True, False, Y, N, T, F	
Start Date	FundStartDate		Date must be before end date if end date is present	

## Fund Appeal Fields

The Fund Appeal Import is used to create appeal information on fund records in *The Raiser's Edge* or to create an import file containing fund appeal information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Appeal ID	FundAppID	Required	ID of existing Appeal that is to be associated with the Fund	
Fund ID	FundID	Required to add new		

**Note:** This import type is used to import existing appeals newly associated with a fund. Appeals already associated with a fund remain and cannot be changed or deleted through **Import**.

## Fund Attribute Fields

The Fund Attribute Import is used to update or create attribute information on fund records in *The Raiser's Edge* or to create an import file containing fund attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	FundAttrImpID	Required to update existing	Text up to 20 characters	Import ID of attribute
Category	FundAttrCat	Required to add new	User-defined table values	
Comments	FundAttrCom		Text up to 50 characters	
Gift Date	FundAttrDate		Date	
Description	FundAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Fund ID	FundID	* See note at end of table	ID of existing Fund	Link to a Fund; Creates exception if fund does not match fund of attribute being updated

\*This field is available for fund attribute import. If available, this field is required to add new records.

## Gift Imports

Using **Import**, you can import new gifts into *The Raiser's Edge*, update existing gifts, or create an import file of gift information.

New gifts linked to events, memberships, and proposals can also be imported but cannot be updated. The gift link fields are available from the event, membership, and proposal imports.

The list below shows the available import types for importing gifts. Each of these is a separate import type. The tables below the list display the fields available for each import type.

- Amendments
- Gift (used for Cash, Pledge, Stock/Property, GIK, Other, Recurring gifts)
- Gift Attribute (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Gift Benefit
- Gift Notepad (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Gift Solicitor (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Installment
- Matching Gift Pledge
- Planned Gift Assets
- Planned Gift Beneficiary
- Planned Gift Relationship
- Pledge Payment
- Recurring Gift Payment
- Soft Credit (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Split Gift (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Tribute Gift (also available with a Matching Gift Pledge, Recurring Gift Payment, and Pledge Payment import)
- Write-Off

## Amendment Fields

The Amendment Import is used to update or create amendments to recurring gifts. You can change the recurring gift amount and transaction schedule, splits, solicitors and more.

## Gift Fields

The following table lists all Gift Fields available as part of amendment fields (a branch of the amendment field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	RGAAck			
Acknowledge Date	RGAAckDate			
Gift Amount	RGAAmt			
Appeal	AppealID			
Campaign	CampID			
Constituent ID	ConsID	Conditionally Required		*See note
Constituent Import ID	Import ID	Conditionally required to update or import new		*See note
Constituent SSN	SSNum			<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Currency Amount	RGACurAmt			
Currency Exchange Rate	RGACurExchangeRate			
Gift Date	RGADate			
Fund	FundID			
Gift Import ID	RGAImpID	Required to create import file		
Gift Link	RGALink	Required to create import file		
Letter Code	RGALtrCode			
Package ID	PackageID			
Sub Type	RGASubType			

\*If available, one is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

## Installment

The following table lists all Installment Fields available as part of amendment fields (a branch of the amendment field list).

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Day of Week	RGAIInsDayName	Conditionally required		
End Day	RGAIInsEndDate			
Frequency	RGAIInsFreq			
Frequency Number	RGAIInsFreqNum			
Frequency Option	RGAIInsFreqOpt	Conditionally required		
Friday	RGAIInsFri			
Monday	RGAIInsMon			
Month Name	RGAIInsMonthName	Conditionally required		
Number of Weeks	RGAIInsWeekFreq			
Numeric Day	RGAIInsNumDay	Conditionally required		
Numeric Day 2	RGAIInsNumDay2	Conditionally required		
Ordinal Day	RGAIInsOrdDay	Conditionally required		
Ordinal Day 1	RGAIInsOrdDay1	Conditionally required		
Ordinal Day 2	RGAIInsOrdDay2	Conditionally required		
Saturday	RGAIInsSat			
Start Date	RGAIInsStartDate			
Sunday	RGAIInsSun			
Thursday	RGAIInsThu			
Tuesday	RGAIInsTue			
Wednesday	RGAIInsWed			

## Solicitor

The following table lists all Solicitor Fields available as part of amendment fields (a branch of the amendment field list). The Solicitor Fields are available when importing new or updating information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	RGASolAmt	Conditionally required	Currency	
Constituent Import ID	SolImportID	Conditionally required		
Gift Solicitor Import ID	RGASolImpID	Conditionally required		

## Split Gifts

The following table lists all Split Gifts Fields available as part of amendment fields (a branch of the amendment field list). The Split Gifts Fields are available when importing new or updating information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Split Amount	RGASplitAmt	Conditionally required	Currency	
Split Appeal	RGASplitAppeal			
Split Campaign	RGASplitAmtCamp			
Split Fund	RGASplitFund			
Split Package	RGASplitPkg			

## Gift Fields

The Gift Import is used to update or create gift records in *The Raiser's Edge* or to create an import file containing gift record information. **Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	GFack		Acknowledged, Not Acknowledged, Do Not Acknowledge	Default = Not Acknowledged
Acknowledge Date	GFackDate		Date	
Address ID	GFAddressID			
Agency	GFAgency		User-defined table	Canada only
Gift Amount	GFTAmt	Required to add new and create import file	Currency	
Amount Bills	GFamtBills		Currency	
Amount Coins	GFamtCoins		Currency	
Anonymous	GFAnon		Yes, No, True, False, Y, N, T, F	Default = No
Appeal	GFAppeal		Appeal ID	Must be an existing Appeal
As of Date	GFAsOfDate			
Authorization Code (US, Can)/Authorisation Code (UK, NZ, Aus)	GFAuthCode		Text up to 20 characters	Imported only if Pay method = Credit Card

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Bank Import ID	BAImpID	Required to import updates	Import ID of existing bank	Required if the payment method is direct debit; Must be a bank relationship on the constituent's record
Benefit Notes	GFBenNote		Text	Memo field
Campaign	CampID		Campaign ID	Must be an existing campaign
Cardholder Name	GFCardholderName		Text	
Check Date (US) / Cheque Date (UK NZ, Aus, Can)	GFCheckDate		Date	Imported only if Pay method = Personal check or Business check
Check Number (US) / Cheque Number (UK, NZ, Aus, Can)	GFCheckNum		Text up to 20 characters	Imported only if Pay method = Personal check or Business check
Constituent Code	GFCons		User-defined table values	New Constituent Code can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent Pays Premiums	GFConstitPaysPremiums			
Constituent Policy Owner	GFConstitPolicyOwner			
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Credit Card Expires	GFCCExpOn		Date	Imported only if Pay method = Credit Card

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Credit Card Number	GFCCType		Text up to 20 characters	Import files generated by RE provide only masked credit card numbers. Imported only if Pay method = Credit Card; <b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Credit Card Type	GFCCType		User-defined table values	New Credit Cards can be added to table during import if checkbox is on; Imported only if Pay method = Credit Card
Gift Date	GFDDate	Required to add new and create import file	Date	
Discount Rate %	GFDDiscountRt			
Drawer	GFDDrawer			Aus only
DDI Source	GFDDISource			UK only
DDI Source Date	GFDDISourceDate			UK only
EFT	GFEFT		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Credit card or Direct debit
Exp. Maturity Year	GFMaturityYr			
Finder number	GFFinderNumber			Used with <b><i>Blackbaud Direct Marketing</i></b>
Flexible Deferred	GFFlexibleDef			
Fund	FundID	Required to add new and create import file	Fund ID	Must be an existing fund

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Code	GFGiftCode		User-defined table values	New Gift Codes can be added to table during import if checkbox is on
Gift Currency Amount	GFCurAmt			
Gift Currency Country	GFCurCntry			
Gift Currency Exchange Rate	GFCurXRate			
Gift Currency Receipt	GFCurRcpt			
Gift ID	GiftID		Text up to 50 characters	Must be unique – can be generated by <b>The Raiser's Edge</b>
Gift Import ID	GFImpID	Required to update existing and create import file	Text up to 20 characters	
Gift is Realized	GFTRealized			
Gift Vehicle	GFVehicle	Required if the Gift Type is Planned Gift (US) or Legacy Gift (UK) (GFTType = Planned Gift / Legacy Gift)		
GL Post Date	GFPostDate		Date	Defaults to system date when adding new
GL Post Status	GFPostStat		Posted, Not Posted, Do Not Post	Default = Not Posted
Include Benefit Notes on Receipt	GFIncludeNotes		Yes, No, True, False, Y, N, T, F	Default = No
Insurance Carrier	GFInsCarrier			
Letter Code	GLtrCode		User-defined table values	New Gift Letter can be added to table during import if checkbox is on
Mailing ID	GFMAILINGID		Numeric up to 50 characters	Used with <b>Blackbaud Direct Marketing</b>

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Marketing Source Code	GFSourceCode		Numeric up to 50 characters	Used with <b>Blackbaud Direct Marketing</b>
Net Present Value	GFNPV			
Net Present Value as of	GFNPVAsOf			
Number of Units	GFNumUnits			
Order Type	GFOderType			NZ, Aus
Package ID	PackageID		ID of existing package	Must be a package of the appeal for which this gift is given
Pay Method	GFPayMeth		Cash, Personal Check, Business Check, Credit Card, Direct Debit, Other	Default = Cash
Payout %	GFPayoutPct			
Payout Amount	GFPayoutAmt			
PIF Name	GFPIFName			
Planned Gift Status	GFPGStatus			
Policy Face Amount	GFPolicyFaceAmt			
Policy Number	GFPolicyNum			
Policy Premium	GFPolicyPremium			
Policy Type	GFPolicyType			
Premium Paid Up	GFPremiumPaidUp			
PrenotificationUnits	GFPrenotifyUnits	Required, Conditionally		Required if sending pre-notification
Portion Subject to Tax	GFPortionTax			UK only
Receipt	GFRcpt		Received, Not Received, Do Not Receipt	Default = Not Received
Receipt Amount	GFRcptAmt		Currency	Default = 0; Must be less than or equal to gift amount if that business rule is on
Receipt Date	GFRcptDate		Date	
Receipt Number	GFRcptNum		Numeric	No formatting is allowed (for instance, 234-567 is not valid)
Received	GFReceived		Yes, No, True, False, Y, N, T, F	Default = No

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Reference	GRef		Text up to 255 characters	
Reference Date	GRefDate		Date	Imported only if Pay method = Cash, Direct debit, Other
Reference Number	GRefNum		Text up to 20 characters	Imported only if Pay method = Cash, Direct debit, Other
Remainder Value	GRemainderValue			
Revocable (US only)	GRevocable			
Send Pledge Reminders	GSendRem		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Type = Pledge
Send PreNotification	GPreNotify		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Direct debit
Standing Order Sent	GSOSent			UK, NZ only
Standing Order Sent On	GSOSentOn			UK NZ only
Status	GStatus		Active, Held, Terminated, Completed	Default = Active; Imported only if Type = Pledge or Recurring Gift
Status Date	GStatusDate			
Stock Issuer	GStklss		Text up to 50 characters	Imported only if Type = Stock/Property
Stock Median Price	GStkMedPrice		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Number of Units	GStkNumUnits		Numeric	Imported only if Type = Stock/Property
Stock Sale Amount	GStkSaleAmt		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Broker Fee	GStkSaleBrokerFee			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Stock Sale Date	GFStkSaleDate		Date	Imported only if Type = Stock/Property
Stock Sale Notes	GFStkSaleNotes		Text	Memo field; Imported only if Type = Stock/Property
Stock Sale Post Date	GFStkSalePostDate		Date	Imported only if Type = Stock/Property; Defaults to system date when adding new
Stock Sale Post Status	GFStkSalePostStat		Posted, Not Posted, Do Not Post	Default = Not Posted; Imported only if Type = Stock/Property
Stock Symbol	GFStkSymbol		Text up to 4 characters	Imported only if Type = Stock/Property
Subtype	GFSubType		User-defined table values	New Gift Sub Types can be added to table during import if checkbox is on
Tax Claim Eligible	GFTaxClaimElig			UK only
Tax Claim Number	GFClaim			UK only; UK only; <b>Note:</b> When changing the value of this field through an update, the system does not consider the current value of <b>Pays Tax</b> on the constituent record, because it may have changed since the gift was created
Term End Date	GFTermEndDt			
Term Type	GFTermType			
Total Units in PIF	GFPIFTotalUnits			
Trust Tax ID Number	GFTrustTaxID			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Type	GFTYPE	Required to add new and create import file	Cash, Pledge, Stock/Property, Gift- in- Kind, Other, Recurring Gift	Default = Cash
VAT Amount Charged	GFVATAmt		Currency	UK only; Defaults to calculation (portion subject to VAT * VAT rate).
VAT Rate	GFVATRate			UK only; Tax rate look-up table
Years in Term	GFTermYears			

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

#### Notes

- To include the **Constituent as a Beneficiary** in an import file, follow this procedure:
  - In the import file, include a value of "0" (zero) as the Type of Relationship under Beneficiaries
  - When the Import process runs, it interprets a **Type of Relationship** value of "0" to mean the constituent is to be included as a beneficiary for the gift and creates the relationship
  - Only a single **Type of Relationship** may be valued as "0" for each gift
  - When the Gift record is opened following a successful import of this type, the first row in the Beneficiaries grid on the Planned Gift tab of the Gift record displays the constituent's information. The **Constituent is Beneficiary** checkbox for that record is checked.
- Import does not automatically calculate a receipt amount.

## Installment Schedule/Payment Fields

The following table lists all Installment Schedule/Payment Fields available for gift imports (a branch of Gift Import field list).

**Important:** Schedule information can be left blank to auto-generate one installment for each pledge being imported.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Day of Week	GFInsDayName	Required if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Ordinal day is not blank	Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday	Only valid if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Ordinal day is not blank
End Date	GFInsEndDate			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Frequency	GFInsFreq	Required to add new (if <b>The Raiser's Edge</b> is not auto-generating)	Annually, Semi-Annually, Quarterly, Bimonthly, Monthly, Semi-Monthly, Biweekly, Weekly, Irregular, Single Installment	* See note at bottom of table
Frequency Number	GFInsFreqNum	Required if Frequency = Monthly	Numeric	Required if Frequency = Monthly
Frequency Option	GFInsFreqOpt	Required if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly	Specific day, User defined day	Only valid if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly
Friday	GFInsFri		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly
Monday	GFInsMon		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly
Month Name	GFInsMonthName	Required if Frequency = Annually	January, February, March, April, May, June, July, August, September, October, November, December	Only valid if Frequency = Annually
Number of Installments	GFInsNumPay	Required to add new if Frequency is not Single Installment		If Frequency = Single Installment, value in this field is ignored
Number of Weeks	GFInsWeekFreq			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Numeric Day	GFInsNumDay	Required if Frequency = Annually; Required if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Ordinal day and Day of week are blank; Required if Frequency is Semi-Monthly <b>and</b> Ordinal day is Specific Day	Numeric from 1 through 31	Only valid if Frequency = Annually, Semi-Annually, Quarterly, Bimonthly, Monthly, Semi-Monthly
Numeric Day 2	GFInsNumDay2	Required if Frequency = Semi-Monthly and Ordinal day 2 is Specific Day	Numeric from 1 through 31	Only valid if Frequency = Semi-Monthly and Ordinal day 2 is Specific Day
Ordinal Day	GFInsOrdDay	Required if Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly <b>and</b> Day of week is not blank; Required if Frequency = Semi-Monthly (day 1)	If Frequency = Semi-Annually, Quarterly, Bimonthly, or Monthly allowed values are First, Second, Third, Fourth, Last; If Frequency = Semi-Monthly allowed values are First, Last, Specific Day	
Ordinal Day 1	GFInsOrdDay1		Accepts values "First", "Last", and "Specific Day"	
Ordinal Day 2	GFInsOrdDay2	Required if Frequency = Semi-Monthly	Accepts values "First", "Last", and "Specific Day"	Only valid if Frequency = Semi-Monthly
Saturday	GFInsSat		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Start Date	GFInsStartDate	Required to add new (if RE is not auto-generating)		If left blank, along with Frequency, when importing pledge, defaults to system date for auto-generated installment
Sunday	GFInsSun		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly
Thursday	GFInsThu		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly
Tuesday	GFInsTue		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly
Wednesday	GFInsWed		Yes/No	Default = No; Only valid if Frequency = Biweekly or Weekly

\* If left blank when importing pledge, defaults to "Single Installment" for auto-generated installment. The value of "Irregular" is valid only when updating a gift - not when adding a new gift. You cannot include actual schedule dates for an irregular pledge when you first adding the pledge. You must 1) import the gift, leaving the Frequency and scheduling information blank, 2) import the actual installment schedule dates and amounts in an Installment Import, 3) update the Frequency of the gift from Single Installment to Irregular using the Gift Import again.

**Note:** If **Frequency** = Biweekly or Weekly and Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday = **No**, then an exception is generated - "Insufficient schedule information".

**Note:** Installment Schedules can be very tricky to import because there are so many different options, and you need to be sure that you selected the correct fields for the installment schedule you want.

## Gift Attribute Fields

The Gift Attribute Import is used to update or create attributes on gift records or to create an import file containing gift attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	GFAttrImpID	Required to update existing gift attribute	Text up to 20 characters	Import ID of gift attribute
Category	GFAttrCat	Required to add new	User-defined table values	Must be existing Gift Attribute Category
Comments	GFAttrCom		Text up to 50 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Date	GFAAttrDate		Date	
Description	GFAAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Gift Import ID	GFImpID	* See note at end of table	ID of existing Gift	Link to Gift; Creates exception if gift does not match gift of attribute being updated

\*This field is available only for gift attribute imports. If available, this field is required to add new records.

## Gift Benefit Fields

The Gift Benefit Import is used to update or create benefits on gift records or to create an import file containing gift benefit information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Benefit	GFBenBen	Required to add new	User-defined table values	New Benefits can be added to table during import if checkbox is on
Benefit Import ID	GFBenImpID	Required to update existing	Text up to 20 characters	
Benefit Notes	GFBenNotes			
Comments	GFBenCom		Text up to 255 characters	
Count	GFBenCount		Numeric up to 999	
Gift link	GFLink	Required to add new	Import ID of existing Gift	Link to Gift; Creates exception if gift does not match gift of benefit being updated
Sent/Fulfilled Date	GFBenSent			
Total Benefit Value	GFBenTotVal		Currency	Default = 0
Unit Cost	GFBenUnitCost		Currency	Default = 0

## Gift Notepad Fields

The Gift Notepad Import is used to update or create notes on gift records or to create an import file containing gift note information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Author	GFNoteAuth		Text up to 50 characters	
Gift Date	GFNoteDate	Required to add new	Date	
Description	GFNoteDesc		Text up to 255 characters	
Gift Link	GFLink	* See note at end of table	Import ID of existing gift	Link to Gift; Creates exception if gift does not match gift of notepad being updated
Notepad Import ID	GFNoteImpID	Required to update existing	Text up to 20 characters	Gift notepad import ID
Notes	GFNoteNotes		Memo field	
Title	GFNoteTitle		Text up to 50 characters	
Gift Type	GFNoteType	Required to add new	User-defined table values	New Gift Notepad Type can be added to table during import if checkbox is on

\*This field is available for only gift notepad imports. If available, this field is required to add new records.

## Gift Solicitor Fields

The Gift Solicitor Import is used to update or create solicitors on gift records or to create an import file containing gift solicitor information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	GFSolAmt	Required to add new	Currency	
Constituent Import ID	SollImpID	Required to add new	Import ID of existing constituent who is a solicitor	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Link	GFLink	* See note at end of table	Import ID of existing gift	Link to Gift; Creates exception if gift does not match gift of solicitor being updated
Gift Solicitor Import ID	GFSoImpID	Required to update existing	Text up to 20 characters	Import ID of Gift solicitor record

\*This field is available for only gift solicitor imports. If available, this field is required to add new and update existing records.

## Installment Fields

The Installment Import is used to update or create installments on gift records or to create an import file containing gift installment information.

**Important:** Schedule information can be left blank to auto-generate one installment for each pledge being imported..

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	GFInsAmt	Required to add new		
Gift Date	GFInsDate	Required to add new		
Gift Link	GFLink	Required to add new	Import ID of existing pledge	Link to Pledge; Creates exception if pledge does not match pledge of installment being updated
Installment Import ID	GFInsImpID	Required to update existing		

**Note:** Installment field imports allow you to import new installments or update installments for existing pledges in your system.

## Matching Gift Pledge Fields

The Matching Gift Import is used to update or create matching gift pledges on gift records or to create an import file containing matching gift pledge information.

**Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	GFack		Acknowledged, Not Acknowledged, Do Not Acknowledge	Default = Not Acknowledged
Acknowledge Date	GFackDate		Date	
Agency	GFAgency		User-defined table values	UK only; Only available if user chooses "voucher" as payment type.
Gift Amount	GFamt	Required to add new	Currency	
Amount Bills	GFamtBills		Currency	
Amount Coins	GFamtCoins		Currency	
Anonymous	GFAnon		Yes, No, True, False, Y, N, T, F	Default = No
Appeal	GFAppeal		Appeal ID	Must be an existing Appeal
Authorization Code (US, Can)/Authorisation Code (UK, NZ, Aus)	GFAuthCode		Text up to 20 characters	Imported only if Pay method = Credit Card
Bank Import ID	BAImpID	Required, conditionally	Import ID of existing bank	Required if the payment method is direct debit. Must be a bank relationship on the constituent's record
Benefit Notes	GFBenNote		Text	Memo field
Campaign	CampID		Campaign ID	Must be an existing campaign
Cardholder Name	GFCardholderName		Text	
Check Date (US) / Cheque Date (UK, NZ, Aus, Can)	GFCheckDate		Date	Imported only if Pay method = Personal check or Business check
Check Number (US) / Cheque Number (UK, NZ, Aus, Can)	GFCheckNum		Text up to 20 characters	Imported only if Pay method = Personal check or Business check

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Tax Claim Number	GFClaimNum			UK only; <b>Note:</b> When changing the value of this field through an update, the system will not consider the current value of <b>Pays Tax</b> on the constituent record, because it may have changed since the gift was created.
Constituent Code	GFCons		User-defined table values	New Constituent Code can be added to table during import if checkbox is on
Constituent Import ID	ImportID	Required to add new and update existing records	Import ID of matching gift organization	Link to MG Organization; Creates exception if organization does not match organization of matching gift pledge being updated
Credit Card Expires	GFCCExpOn		Date	Imported only if Pay method = Credit Card
Credit Card Number	GFCCNum		Text up to 20 characters	Imported only if Pay method = Credit Card; Import files generated by RE provide only masked credit card numbers.
Credit Card Type	GFCCType		User-defined table values	New Credit Cards can be added to table during import if checkbox is on; Imported only if Pay method = Credit Card
Gift Date	GFDate	Required to add new	Date	
DDI Source	GFDDISource			UK only

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
DDI Source Date	GFDDISourceDate			UK only
Drawer	GFDrawer			Aus only
EFT	GFEFT		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Credit card or Direct debit
Fund	FundID	Required to add new	Fund ID	Must be an existing fund
Gift Code	GFGiftCode		User-defined table values	New Gift Codes can be added to table during import if checkbox is on
Gift Currency Amount	GFCurAmt			
Gift Currency Country	GFCurCntry			
Gift Currency Exchange Rate	GFCurXRate			
Gift Currency Receipt	GFCurRcpt			
Gift ID	GiftID		Text up to 50 characters	Must be unique – can be generated by RE
Gift Import ID	GFImpID	Required to update existing	Text up to 20 characters	
Gift Link	GFLink	Required to add new and update existing records	Import ID of existing gift	Link to gift that originated the matching gift pledge; Creates exception if gift link does not match gift link of gift being updated
Post Date	GFPostDate		Date	Defaults to system date when adding new
Post Status	GFPostStat		Posted, Not Posted, Do Not Post	Default = Not Posted
Include Benefit Notes on Receipt	GFIncludeNotes		Yes, No, True, False, Y, N, T, F	Default = No

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Letter Code	GFLtrCode		User-defined table values	New Gift Letter can be added to table during import if checkbox is on
Order Type	GFOrderType			NZ, Aus
Package ID	Package ID		Import ID of existing package	Must be a package of the appeal for which this gift is given
Portion Subject to Tax	GFPortionTax			UK only
PrenotificationUnits	GFPrenotifyUnits	Required, conditionally	Numeric from 10 through 30	Required if Send Prenotification= Yes; Only imported for Direct debit pay method
Receipt	GFRcpt		Received, Not Received, Do Not Receipt	Default = Not Received
Receipt Amount	GFRcptAmt		Currency	Default = 0; Must be less than or equal to gift amount if that business rule is on
Receipt Date	GFRcptDate		Date	
Receipt Number	GFRcptNum		Numeric	No formatting is allowed (for instance, 234-567 is not valid)
Received	GFRceived		Yes, No, True, False, Y, N, T, F	Default = No
Reference	GFRef		Text up to 255 characters	
Reference Date	GFRefDate		Date	Imported only if Pay method = Cash, Direct debit, Other
Reference Number	GFRefNum		Text up to 20 characters	Imported only if Pay method = Cash, Direct debit, Other
Send Pledge Reminders	GFSendRem		Yes, No, True, False, Y, N, T, F	Default = Yes;

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Send Pre-Notification	GFPPreNotify		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Direct debit
Standing Order Sent	GFSOSent			UK, NZ
Standing Order Sent On	GFSOSentOn		Date	UK, NZ
Status	GFStatus		Active, Held, Terminated, Completed	Default = Active; Imported only if Type = Pledge or Recurring Gift
Status Date	GFStatusDate			
Stock Issuer	GFStklss		Text up to 50 characters	Imported only if Type = Stock/Property
Stock Median Price	GFStkMedPrice		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Number of Units	GFStkNumUnits		Numeric	Imported only if Type = Stock/Property
Stock Sale Amount	GFStkSaleAmt		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Broker Fee	GFStkSaleBrokerFee		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Date	GFStkSaleDate		Date	Imported only if Type = Stock/Property
Stock Sale Notes	GFStkSaleCom		Text	Memo field; Imported only if Type = Stock/Property
Stock Sale Post Date	GFStkSalePostDate		Date	Imported only if Type = Stock/Property; Defaults to system date when adding new

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Stock Sale Post Status	GFStkSalePostStat		Posted, Not Posted, Do Not Post	Default = Not Posted; Imported only if Type = Stock/Property
Stock Symbol	GFStkSymbol		Text up to 4 characters	Imported only if Type = Stock/Property
Subtype	GFSubType		User-defined table values	New Gift Sub Types can be added to table during import if checkbox is on
Tax Claim Eligible	GFTaxClaimElig			UK only
VAT Amount Charged	GFVATAmt		Currency	UK only; Defaults to calculation (portion subject to VAT *VAT rate)
VAT Rate	GFVATRate			UK only; Tax rate look-up table

**Note:** Import does not automatically calculate a receipt amount.

## Planned Gift Asset

The Planned Gift Asset Import is used to update or add information to your planned gift records. You can also create an import file.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Asset Amount	GFPGAssetAmt			
Asset Description	GFPGAssetDesc			
Asset Import ID	GFPGAssetImpID	Required if any fields in included in the Planned Gift Asset import are present in the import file.		
Asset Type	GFPGAssetType			
Cost Basis (US only)	GFPGCostBasis			
Gift Import ID	GFPGAssetGiftImpID	Required to import new records, update existing records, and/or create import file		

## Planned Gift Beneficiaries

The Planned Gift Beneficiaries Import is used to add beneficiary information to your planned gift records. You can also create an import file.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Beneficiary Type	GFPGBenType			
Gift Import ID	GFPGBenGiftImpID	Required to import new records, update existing records, and/or create import file		
Relationship Import ID	GFPGBenImpID	Required to import new records and/or create import file		
Type of Relationship	GFPGBenTypeofRel	Required to import new records, update existing records, and/or create import file	The range of valid values is a number from 0-4, mapped to the following: 0 - self beneficiary 1- individual relationship 2 - organization relationship 3 - financial relationship 4 - education relationship	

## Planned Gift Relationship

The Planned Gift Relationship Import is used to update or add relationship information to your planned gift records. You can also create an import file.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Import ID	GFPGRelGiftImpID	Required to import new records, update existing records, and/or create import file		
Relationship Import ID	GFPGRelImpID	Required to import new records and/or create import file		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Type of Relationship	GFPGRelTypeofRel	Required to import new records, update existing records, and/or create import file	The range of valid values is a number from 0-4, mapped to the following: 0 - self beneficiary 1- individual relationship 2 - organization relationship 3 - financial relationship 4 - education relationship	

## Pledge Payment Fields

The Pledge Payment Import is used to update or create pledge payments on gift records or to create an import file containing pledge payment information.

**Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	GFack		Acknowledged, Not Acknowledged, Do Not Acknowledge	Default = Not Acknowledged
Acknowledge Date	GFackDate		Date	
Agency	GFAgency		User-defined table values	UK only. Only available if user chooses "Voucher" as payment type
Gift Amount	GFTAmt	Required to add new	Currency	
Amount Bills	GFamtBills		Currency	
Amount Coins	GFamtCoins		Currency	
Anonymous	GFAnon		Yes, No, True, False, Y, N, T, F	Default = No
Appeal	GFAppeal		Appeal ID	Must be an existing Appeal
Authorization Code	GFAuthCode		Text up to 20 characters	Imported only if Pay method = Credit Card

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Bank Import ID	BAImpID	Required, conditionally	Import ID of existing bank	Required if payment method id direct debit; Must be a bank relationship on the constituent's record
Benefit Notes	GFBenNote		Text	Memo field
Campaign	CampID		Campaign ID	Must be an existing campaign
Cardholder Name	GFCardholderName		Text	
Check Date (US) / Cheque Date (UK, NZ, Aus, Can)	GFCheckDate		Date	Imported only if Pay method = Personal check or Business check
Check Number (US) / Cheque Number (UK, NZ, Aus, Can)	GFCheckNum		Text up to 20 characters	Imported only if Pay method = Personal check or Business check
Tax Claim Number	GFClaimNum			UK only; UK only; <b>Note:</b> When changing the value of this field through an update, the system will not consider the current value of <b>Pays Tax</b> on the constituent record, because it may have changed since the gift was created.
Constituent Code	GFCons		User-defined table values	New Constituent Code can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Credit Card Expires	GFCCEXPon		Date	Imported only if Pay method = Credit Card
Credit Card Number	GFCNum		Text up to 20 characters	Imported only if Pay method = Credit Card; Import files generated by RE provide only masked credit card numbers.
Credit Card Type	GFCCType		User-defined table values	New Credit Cards can be added to table during import if checkbox is on; Imported only if Pay method = Credit Card
Gift Date	GFDDate	Required to add new	Date	
Drawer	GFDDrawer			Aus only
EFT	GFEFT		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Credit card or Direct debit
Fund	FundID	Required to add new	Fund ID	Must be an existing fund
Gift Code	GFGiftCode		User-defined table values	New Gift Codes can be added to table during import if checkbox is on
Gift Currency Amount	GFCurAmt			
Gift Currency Country	GFCurCntry			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Currency Exchange Rate	GFCurXRate			
Gift Currency Receipt	GFCurRcpt			
Gift ID	GiftID		Text up to 50 characters	Must be unique – can be generated by RE
Gift Import ID	GFImpID	Required to update existing	Text up to 20 characters	
Gift Link	GFLink	Required to add new <b>and</b> update existing	Import ID of existing pledge	Link to existing pledge; Payments are applied to installments in chronological order
Include Benefit Notes on Receipt	GFIincludeNotes		Yes, No, True, False, Y, N, T, F	Default = No
Letter Code	GFLtrCode		User-defined table values	New Gift Letter can be added to table during import if checkbox is on
Package ID	PackageID		Import ID of existing package	Must be a package of the appeal for which this gift is given
Pay Method	GFPayMeth		Cash, Personal Check, Business Check, Credit Card, Direct Debit, Other	Default = Cash
Portion Subject to Tax	GFPortionTax			UK only
GL Post Date	GFPostDate		Date	Defaults to system date when adding new
GL Post Status	GFPostStat		Posted, Not Posted, Do Not Post	Default = Not Posted
PrenotificationUnits	GFPrenotifyUnits	Required, conditionally	Numeric from 10 through 30	Required if Send Prenotification= Yes. Only imported for Direct debit pay method
Receipt	GFRcpt		Received, Not Received, Do Not Receipt	Default = Not Received

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Receipt Amount	GFRcptAmt		Currency	Default = 0; Must be less than or equal to gift amount if that business rule is on
Receipt Date	GFRcptDate		Date	
Receipt Number	GFRcptNum		Numeric	No formatting is allowed (for instance, 234-567 is not valid)
Reference	GRef		Text up to 255 characters	
Reference Date	GRefDate		Date	Imported only if Pay method = Cash, Direct debit, Other
Reference Number	GRefNum		Text up to 20 characters	Imported only if Pay method = Cash, Direct debit, Other
Send Pledge Reminders	GFSendRem			
Received	GFRreceived		Yes, No, True, False, Y, N, T, F	Default = No
Send Pre-Notification	GFPrenotify		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Direct debit
Standing Order Sent	GFSOSent			UK, NZ
Standing Order Sent On	GFSOSentOn			UK, NZ
Status	GFSstatus		Active, Held, Terminated, Completed	Default = Active; Imported only if Type = Pledge or Recurring Gift
Stock Issuer	GFSstkIss		Text up to 50 characters	Imported only if Type = Stock/Property
Stock Median Price	GFSstkMedPrice		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Number of Units	GFSstkNumUnits		Numeric	Imported only if Type = Stock/Property

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Stock Sale Amount	GFStkSale		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Broker Fee	GFStkSaleBrokerFee		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Date	GFStkSaleDate		Date	Imported only if Type = Stock/Property
Stock Sale Notes	GFStkSaleNotes		Text	Memo field; Imported only if Type = Stock/Property
Stock Sale Post Date	GFStkSalePostDate		Date	Imported only if Type = Stock/Property; Defaults to system date when adding new
Stock Sale Post Status	GFStkSalePostStat		Posted, Not Posted, Do Not Post	Default = Not Posted; Imported only if Type = Stock/Property
Stock Symbol	GFStkSymbol		Text up to 4 characters	Imported only if Type = Stock/Property
Subtype	GFSubType		User-defined table values	New Gift Sub Types can be added to table during import if checkbox is on
Gift Type	GFTType	Required to add new	Cash, Pledge, Stock/Property, Gift in Kind, Other	Default = Cash
Tax Claim Eligible	GFTaxClaimElig			UK only
VAT Amount charged	GFVATAmt		Currency	UK only; Defaults to calculation (portion subject to VAT *VAT rate).
VAT Rate	GFVATRate			UK only; Tax rate look-up table.

\*One of the three fields is required, depending on the option selected on General Tab to identify existing constituents. The field is required to add new gifts. The other two fields are ignored. When updating an existing gift, an exception generates if the constituent linked does not match the existing gift's constituent.

**Note:** Import does not automatically calculate a receipt amount.

## Recurring Gift Payment Fields

The Recurring Gift Payment Import is used to create recurring gift payments on gift records or to create an import file containing recurring gift payment information.

**Warning:** If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud Payment Service. We strongly recommend you encrypt credit card information in compliance with the Payment Card Industry Data Security Standard (PCI DSS). The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Acknowledge	GFack		Acknowledged, Not Acknowledged, Do Not Acknowledge	Default = Not Acknowledged
Acknowledge Date	GFackDate		Date	
Agency	GFAgency		User-defined table values	Only available if user chooses "voucher"
Gift Amount	GFamt	Required to add new	Currency	
Amount Bills	GFamtBills		Currency	
Amount Coins	GFamtCoins		Currency	
Anonymous	GFAnon		Yes, No, True, False, Y, N, T, F	Default = No
Appeal	GFAppeal		Appeal ID	Must be an existing Appeal
Authorization Code	GFAuthCode		Text up to 20 characters	Imported only if Pay method = Credit Card
Bank Import ID	BAImpID	Required, conditionally	Import ID of existing bank	Required if the payment method is direct debit; Must be a bank relationship on the constituent's record.
Benefit Notes	GFBenNote		Text	Memo field
Campaign	CampID		Campaign ID	Must be an existing campaign
Cardholder Name	GFCardholderName		Text	
Check Date (US) / Cheque Date (UK, NZ, Aus, Can)	GFCheckDate		Date	Imported only if Pay method = Personal check or Business check

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Check Number (US) / Cheque Number (UK, NZ, Aus, Can)	GFCheckNum		Text up to 20 characters	Imported only if Pay method = Personal check or Business check
Tax Claim Number	GFClaimNum			UK only; UK only; <b>Note:</b> When changing the value of this field through an update, the system will not consider the current value of <b>Pays Tax</b> on the constituent record, because it may have changed since the gift was created.
Constituent Code	GFCons		User-defined table values	New Constituent Code can be added to table during import if checkbox is on
Constituent ID	ConsID	* See note at end of table		
Constituent Import ID	ImportID	* See note at end of table		
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table		<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Credit Card Number	GFCCNum		Text up to 20 characters	Imported only if Pay method = Credit Card; Import files generated by RE provide only masked credit card numbers.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Credit Card Type	GFCCType		User-defined table values	New Credit Cards can be added to table during import if checkbox is on; Imported only if Pay method = Credit Card
Credit Card Expires	GFCCEpOn		Date	Imported only if Pay method = Credit Card
Gift Date	GFDDate	Required to add new	Date	
Drawer	GFDrawer			Aus only
EFT	GFEFT		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Credit card or Direct debit
Fund	FundID	Required to add new	Fund ID	Must be an existing fund
Gift Code	GFGiftCode		User-defined table values	New Gift Codes can be added to table during import if checkbox is on
Gift Currency Amount	GFCurAmt			
Gift Currency Country	GFCurCntry			
Gift Currency Exchange Rate	GFCurXRate			
Gift Currency Receipt	GFCurRcpt			
Gift ID	GiftID		Text up to 50 characters	Must be unique – can be generated by <b><i>The Raiser's Edge</i></b>
Gift Link	GFLink	Required to add new	Import ID of recurring gift being paid	Link to recurring gift
Include Benefit Notes on Receipt	GFLIncludeNotes		Yes, No, True, False, Y, N, T, F	Default = No
Letter Code	GFLtrCode		User-defined table values	New Gift Letter can be added to table during import if checkbox is on

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Order Type	GFOrderType			NZ, Aus
Package ID	PackageID		ID of existing package	Must be a package of the appeal for which this gift is given
Pay Method	GFPayMeth		Cash, Personal Check, Business Check, Credit Card, Direct Debit, Other	Default = Cash
Portion Subject to Tax	GFPortionTax		Date	UK only
GL Post Date	GFPostDate		Date	Defaults to system date when adding new
GL Post Status	GFPostStat		Posted, Not Posted, Do Not Post	Default = Not Posted
PrenotificationUnits	GFPreNotifyUnits	Required, conditionally	Numeric from 10 through 30	Requires if Send Prenotification= Yes.
Receipt	GFRcpt		Received, Not Received, Do Not Receipt	Default = Not Received
Receipt Amount	GFRcptAmt		Currency	Default = 0; Must be less than or equal to gift amount if that business rule is on
Receipt Date	GFRcptDate		Date	
Receipt Number	GFRcptNum		Numeric	No formatting is allowed (for instance, 234-567 is not valid)
Received	GFRceived		Yes, No, True, False, Y, N, T, F	Default = No
Reference	GFRef		Text up to 255 characters	
Reference Date	GFRefDate		Date	Imported only if Pay method = Cash, Direct debit, Other
Reference Number	GFRefNum		Text up to 20 characters	Imported only if Pay method = Cash, Direct debit, Other

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Send Pledge Reminders	GFSendRem			
Send Pre-Notification	GFPrenotify		Yes, No, True, False, Y, N, T, F	Default = No; Imported only if Pay method = Direct debit
Standing Orders Sent	GFSOSent			UK, NZ
Standing Orders Sent On	GFSOSentOn		Date	UK, NZ
Skip	RCGFSkip		Yes, No, True, False, Y, N, T, F	Default = No; If value is Yes, then all other gift information for this gift is ignored by import
Status	GFStatus		Active, Held, Terminated, Completed	Default = Active; Imported only if Type = Pledge or Recurring Gift
Stock Issuer	GFStklss		Text up to 50 characters	Imported only if Type = Stock/Property
Stock Median Price	GFStkMedPrice		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Number of Units	GFStkNumUnits		Numeric	Imported only if Type = Stock/Property
Stock Sale Amount	GFStkSale		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Broker Fee	GFStkSaleBrokerFee		Currency	Default = 0; Imported only if Type = Stock/Property
Stock Sale Date	GFStkSaleDate		Date	Imported only if Type = Stock/Property
Stock Sale Notes	GFStkSaleNotes		Text	Memo field; Imported only if Type = Stock/Property

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Stock Sale Post Date	GFStkSalePostDate		Date	Imported only if Type = Stock/Property; Defaults to system date when adding new
Stock Sale Post Status	GFStkSalePostStat		Posted, Not Posted, Do Not Post	Default = Not Posted; Imported only if Type = Stock/Property
Stock Symbol	GFStkSymbol		Text up to 4 characters	Imported only if Type = Stock/Property
Subtype	GFSubType		User-defined table values	New Gift Sub Types can be added to table during import if checkbox is on
Tax Claim Eligible	GFTaxClaimElig			UK only
VAT Amount Charged	GFVATAmt		Currency	UK only; Defaults to calculation (portion subject to VAT *VAT rate).
VAT Rate	GFVATRate			UK only; Tax rate look-up table.

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. The other two fields are ignored.

This import type can be used only to import payments for a recurring gift – existing payments remain and cannot be changed or deleted through **Import**.

**Note:** Import does not automatically calculate a receipt amount.

## Soft Credit Fields

The Soft Credit Import is used to update or create soft credits on gift records or to create an import file containing soft credit information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	SoftCredAmt		Currency	Default = 0
Gift Link	GFTLink	* See note at end of table	Import ID of existing gift	Link to Gift; Creates exception if gift does not match gift of soft credit being updated

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Recipient Import ID	SoftCredRecip	Required to add new	Import ID of existing constituent	Import ID of Constituent receiving the soft credit
Soft Credit Import ID	SoftCreditImpID	Required to update existing	Text up to 20 characters	

\* This field is available for only soft credit imports. If available, this field is required to add new records.

## Split Gift Fields

The Split Gift Import is used to update or create split gifts on gift records or to create an import file containing split gift information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Link	GFImpID	* See note at end of table	Import ID of existing gift	Link to Gift; Creates exception if gift does not match gift of split being updated
Split Amount	GSplitAmt	Required	Currency	Default = 0
Split Appeal	GSplitAppeal		ID of existing Appeal	
Split Campaign	GSplitCamp		ID of existing Campaign	
Split Fund	GSplitFund	Required to add new	ID of existing Fund	
Split Gift Import ID	GSplitImpID	Required to update existing	Text up to 20 characters	
Split Package	GSplitPkg			

\*This field is available for only split gift imports. If available, this field is required to add new records.

**Note:** The total of all split gift amounts **must** equal the full amount of gift.

## Tribute Gift Fields

The Tribute Gift Import is used to update or create tribute gifts on gift records or to create an import file containing tribute gift information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Tribute Gift Import ID	TribGiftImpID	Required		
Gift Link	GFTLink	Required		
Tribute Import ID	TribImpID	Required		
Acknowledge	GFHMAck			
Gift Type	TribType			

## Write-Off Fields

The Write-Off Import is used to create write offs on gift records or to create an import file containing write-off information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Gift Amount	WriteOffAmt	Required	Currency	Default = 0
Gift Date	WriteOffDate	Required	Date	Must be on or after date of pledge receiving write-off
Gift Link	GFLink	Required	Import ID of existing pledge	Link to pledge;
GL Post Date	WriteOffPostDate		Date	Defaults to system date when adding new
GL Post Status	WriteOffPostStat		Posted, Not Posted, Do Not Post	Default = Not Posted
Reference	WriteOffRef		Text up to 255 characters	

**Note:** This import type can be used only to import write-offs for a pledge. Existing write-offs remain and cannot be changed or deleted through **Import**.

## Job Imports

Using **Import**, you can import new job records in *The Raiser's Edge*, update existing jobs, or create an import file of job information.

The list below shows the available import types for importing jobs. Each of these is a separate import type. The tables below the list display the fields available for each import type.

- Job
- Job Attribute (also available as part of a Job import)

## Job Fields

The Job Import is used to update or create job records or to create an import file containing job information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Allow Mandate	JobAllowMandate		Yes, No, True, False, Y, N, T, F	Allow mandated volunteers
Category	JobCat		User-defined code table values	New Category can be added to table during import if checkbox is on
Completed	JobComplete		Yes, No, True, False, Y, N, T, F	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Description	JobDesc		Text up to 255 characters	
End Date	JobEndDate		Date	
Event ID	EventID	* See note at end of table	Text up to 20 characters	
Job	JobName	Required to add new	Text up to 50 characters	
Job Import ID	JobImpID	Required to update existing	Text up to 20 characters	
Minimum Age	JobMinAge		Numeric up to 999	
Organization Import ID	ImportID	* See note at end of table	Import ID of existing Organization constituent	
Position	JobPosition		Text up to 50 characters	
Start Date	JobStartDate		Time	
Volunteer Type	JobVolType		User-defined code table values	New Type can be added to table during import if checkbox is on

\*Only one of these two fields is allowed. If both are imported, an exception is generated for the record.

## Job Attribute Fields

The Job Attribute Import is used to update or create attributes on job records or to create an import file containing job attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	JobAttrImpID	Required to update existing job attribute	Text up to 20 characters	Import ID of job attribute
Category	JobAttrCat	Required to add new	User-defined table values	
Comments	JobAttrCom		Text up to 50 characters	
Gift Date	JobAttrDate		Date	
Description	JobAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Job Import ID	JobImpID	* See note at end of table	Import ID of existing Job	Link to Job; Creates exception if job does not match job of attribute being updated

\* This field is available only for job attribute imports. If available, this field is required to add new records.

## Membership Imports

Using **Import**, you can import new memberships into membership records in *The Raiser's Edge*, update existing memberships, or create an import file of membership information.

The list below shows the available import types for importing memberships. Each of these is a separate import type. The tables below the list display the fields available for each import type.

Note: You cannot upgrade or downgrade memberships through an import.

- Membership
- Membership Attribute (also available as part of a Membership import)
- Membership Benefit
- Membership Card
- Membership History Fields
- Membership Linked Gift
- Membership Solicitor

## Membership Fields

The Membership Import is used to update or create membership records in *The Raiser's Edge* or to create an import file containing membership information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Benefits Notes	MEBenNotes		Text	Memo field
Category	MECat	Required to add new	User-defined code table values	Must be existing Category; ***See note at end of table.
Comments	MECom		Text up to 255 characters	
Constituent ID	ConsID	* See note at end of table	Text up to 20 characters	
Constituent Import ID	ImportID	* See note at end of table	Text up to 20 characters	

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Constituent SSN (US)/SIN (Can)/NIN (UK)/ID2 (Aus, NZ)	SSNum	* See note at end of table	Text up to 20 characters	<b>Security</b> settings determine ability to import this information. For more information, see the Security chapter in the <i>Configuration &amp; Security Guide</i> .
Date Joined	MECycleStart	Required to add new	Date	
Dues	MEDues		Currency up to 9,999,999,999.00	
Expires On	MEXpiresDate	Required to add new, if not Lifetime	Date	Not imported if Lifetime = Yes
Gift From	MEGivenBy	Required, conditionally	Import ID of existing constituent giving gift	Required to designate membership is a gift; If not blank, then membership is gift
Lifetime	MELifetime	Required	Yes, No, True, False, Y, N, T, F	Default = No
Override Renewal Defaults	MEOVERRIDERenewalDef		Yes, No, True, False, Y, N, T, F	
Membership ID	MembershipID		Text up to 20 characters	Must be unique – can be generated by RE
Membership Import ID	MEImpID	Required to update existing	Text up to 20 characters	** See note at end of table
Notes	MENotes		Text	Memo field
Print Renewals	MEPrintNotices		Yes, No, True, False, Y, N, T, F	Default = No
Program	MEProgram	Required	User-defined table values	
Reason	MEReason		User-defined table values	New Reason can be added to table during import if checkbox is on
Send Benefits To	MESendBenTo		Primary Member, Donor	Default = Primary Member; Only imported if membership is a gift

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Send Notice To	MESendNoticesTo		Primary Member, Donor, Both	Default = Donor; Only imported if membership is a gift
Special Message	MEGiftSpecialMsg		Text up to 255 characters	Only imported if membership is a gift
Subcategory	MESubCat		User-defined table values	Must be existing Subcategory
Total Children	MENumChild		Numeric up to 9999 (>= 0)	Default = 0
Total Members	MENumMembers	Required to add new	Numeric up to 9999 (must be > 0)	
Gift Type	METype	Required to add new	Joined, dropped, upgrade, downgrade, rejoined, renewal	
Waive Benefits	MEWaiveBenefit		Yes, No, True, False, Y, N, T, F	Default = No

\*If available, one of them is required, depending on the option selected in the **What ID field do you want to use?** frame on the General Tab to identify existing constituents. If available, the field is required to add new constituent notepads. The other two fields are ignored.

\*\*If the user is "importing new" and the membership ID already exists, this information is added as a new transaction to the existing membership record. If the user is "importing new" and the membership ID does not already exist or is blank, this information is added as a new membership record for the constituent. If the user is "updating" with or without the option to import new and the membership ID already exists, this information updates the current transaction on the existing membership record. If the user is "updating" with the option to import new and the membership ID does not already exist or is blank, this information is added as a new membership record for the constituent. If the user is "updating" without the option to import new and this membership ID does not already exist or is blank, an exception is generated.

\*\*\*If you set up a membership category with default benefits and then import new memberships using this category, the default benefits are not automatically added to the newly imported membership records. You can add the benefits to the membership import.

## Membership Attribute Fields

The Membership Attribute Import is used to update or create attributes in membership records in *The Raiser's Edge* or to create an import file containing membership attribute information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Attribute Import ID	MEAttrImpID	Required to update existing membership attribute	Text up to 20 characters	Import ID of membership attribute
Category	MEAttrCat	Required to add new	User-defined table values	**See note at end of table.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Comments	MEAttrCom		Text up to 50 characters	
Gift Date	MEAttrDate		Date	
Description	MEAttrDesc	Required to add new	Depends on type of attribute as set in Configuration	
Membership Import ID	MEImpID	* See note at end of table	ID of existing Membership	Link to Membership; Creates exception if membership does not match membership of attribute being updated

\* This field is available for membership attribute imports. If available, this field is required to add new records.

\*\*If you set up a membership category with default benefits and then import new memberships using this category, the default benefits are not automatically added to the newly imported membership records. You can add the benefits to the membership import.

## Membership Benefit Fields

The Membership Benefit Import is used to update or create benefits in membership records in *The Raiser's Edge* or to create an import file containing membership benefit information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Benefit	MEBenBen	Required	User-defined table values	New Benefit can be added to table during import if checkbox is on
Benefit Import ID	MEBenImpID	Required to update existing records	Text up to 20 characters	
Comments	MEBenCom		Text up to 255 characters	
Count	MEBenCount		Numeric up to 999	
Membership Import ID	MEImpID	Required to add new <b>and</b> update existing	Import ID of existing Membership	Link to Membership; Creates exception if membership does not match membership of benefit being updated

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Total Benefit Value	MEBenTotVal		Currency up to 9,999,999,999.00	Although this field does calculate when unit cost and count data are entered in <i>The Raiser's Edge</i> , it does NOT calculate when imported.
Unit Cost	MEBenUnitCost		Currency up to 9,999,999,999.00	Default = 0

## Membership Card Fields

The Membership Card Import is used to create cards in membership records in *The Raiser's Edge* or to create an import file containing membership card information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Address to Print	MECardAddr		None, Select from primary member's addresses, Select from joint member's addresses	Default = Select from primary member's addresses
Card Expires	MECardExpires			
Card Import ID	MECardImpID	Required to update existing	Unique text up to 20 characters	
Card Member	MECardRecipient		Yes, No, True, False, Y, N, T, F	Must be Yes for all memberships or will generate exception
Date Last Printed	MECardLastPrinted		Date	
Editable	MECardNmEdit		Yes, No, True, False, Y, N, T, F	Default = No; Available for individuals, not orgs
Joint Member	MECardJoint		Yes, No, True, False, Y, N, T, F	Default = No
Membership Import ID	MEImpID	Required to add new <b>and</b> update existing	Import ID of existing membership	Link to existing Membership
Name	MECardNm	Required if editable	Text	
Number to Print	MECardNumCards		Numeric up to 9999; (>= 0)	Default = 0
Relationship	MECardRel			

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Relationship Import ID	MECardRelImpID		Relationship Import ID	Link to Relationship; Creates exception if Relationship is not an existing Relationship of Member
Status	MECardStatus		Printed, Not Printed, Do Not Print, Lost	Default = Not Printed
Gift Type	MECardType		User-defined table values	New Card Type can be added to table during import if checkbox is on
Valid From	MECardValidFrom		Date	
Valid To	MECardValidTo		Date	

## Membership History Fields

The Membership History Import is used to import historical information in membership records in **The Raiser's Edge** or to create an import file containing historical membership information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Membership Import ID	MEImpID	Required	Import ID of the membership to be updated	Link to membership
Membership History Import ID	MEHisImportID	Required	Import ID of the membership transaction to be updated	

This import type does not import new transactions into **The Raiser's Edge**. You can use it to add gifts to existing transactions only.

## Membership Linked Gift Fields

The Membership Linked Gift Import is used to create linked gifts in membership records in **The Raiser's Edge** or to create an import file containing membership linked gift information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Applied Amount	MELinkGiftAmt	Required	Currency up to amount of gift	
Gift import ID	GFImpID	Required	Import ID of existing gift	Creates exception if this gift is already linked to the membership

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Membership Import ID	MEImpID	Required	Import ID of existing membership	

**Note:** The membership information can also be linked through a gift import. This import should be used if the gift is already present in the system and a gift update is not possible for this type of import.

## Membership Solicitor Fields

The Membership Solicitor Import is used to create solicitors in membership records in *The Raiser's Edge* or to create an import file containing membership solicitor information.

Raiser's Edge Field	Import Name	Required ?	Allowed Values	Notes
Membership Import ID	MEImpID	Required	Import ID of existing membership	Link to membership
Solicitor Import ID	ImportID	Required	Import ID of existing constituent who is a solicitor	Link to constituent/solicit or

**Note:** You can **add** a solicitor only – not update.

# Import Instructions in the Knowledgebase



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**Accessing the Knowledgebase** ..... 266  
**Sample Import Files** ..... 267  
**Knowledgebase Solution IDs for Import** ..... 268

**Procedures**

Accessing the Knowledgebase ..... 266  
Accessing sample import files in the Knowledgebase ..... 267

The Knowledgebase provides answers to your frequently asked questions and software issues. It contains thousands of solutions written by our customer support analysts, addressing everything from how-to questions to troubleshooting steps.

This appendix includes instructions on how to use the Knowledgebase and a list of import solutions available through the Knowledgebase.

## Searching in the Knowledgebase

To search the Knowledgebase, ask complete questions and avoid using boolean operators, such as “and” or “or.” You do not need to use confusing symbols or terms required by most keyword searches.

If you want to know how to complete a particular function, the best way to query the Knowledgebase is through the **Quick Search** field. Start your question with the words “How to”. The Knowledgebase provides solutions based on your specific search requests. If a specific request fails the first time, try a more general request. For example, if you fail to find a solution for “How to import cash gifts” try “How to import gifts”.

The Knowledgebase works best when you ask one search question or phrase at a time, and it can correct some spelling errors. Capitalization does not affect your search.

The Knowledgebase recognizes word order, so search with the same word order you use in everyday conversation. For example, enter “How to import constituent names and addresses”, not “import names, addresses”. Also, include a space between the words in your search phrase.

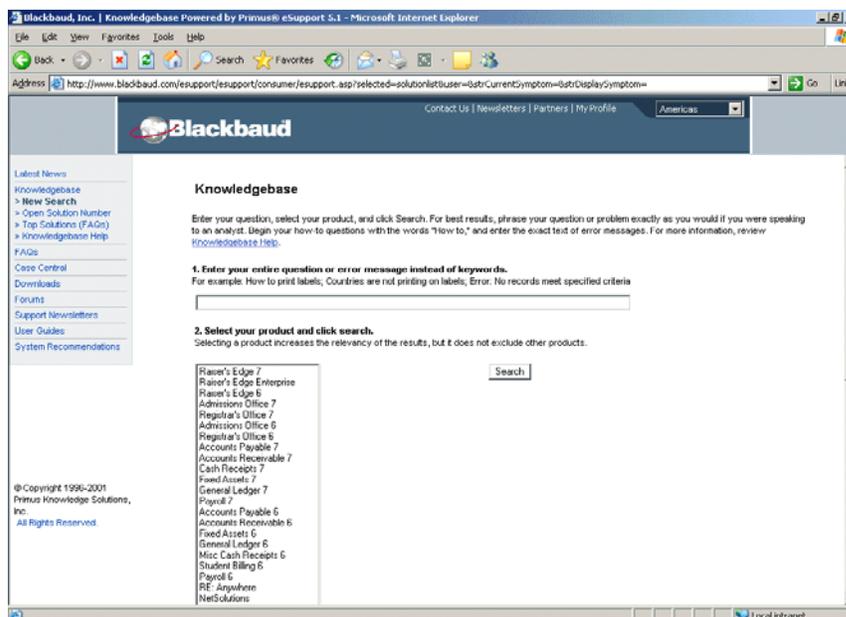
## Accessing the Knowledgebase

The Knowledgebase is housed on the Blackbaud Web site and maintained by our customer support analysts.

### ► Accessing the Knowledgebase

1. From your Web browser, open the Knowledgebase Web page:  
kb.blackbaud.com.

The Knowledgebase screen appears.



- If you know the solution ID, click the **Open Solution Number** link available on the left side of the page. The Explorer User Prompt screen appears. For a list of the most popular import solution IDs currently available through the Knowledgebase, see “Knowledgebase Solution IDs for Import” on page 268.



- Enter the solution ID in the **Enter Tip ID** field, and click **OK**. The solution page appears, offering detailed instructions on how to run the import and a sample import file.
- If you do not know the solution ID, you can search the database.
  - In the first (1) step, enter your question. For example, if you want to know how to import new gifts into *The Raiser's Edge*, enter “How to import gifts”.
  - In the second (2) step, select the Blackbaud product in which you are working: **The Raiser's Edge 7**.
  - When you complete the Knowledgebase screen, click **Search**. A list of possible solutions appears.
  - If your solution does not appear, refine your search criteria and run a new search. If one of the options appears to answer your question, click the link to access the instructions.

## Sample Import Files

All the most popular Knowledgebase solutions for **Import** include a sample import file. The sample files are helpful in teaching you the structure of the various import files.

### ▶ Accessing sample import files in the Knowledgebase

- Locate the Knowledgebase solution (see “Accessing the Knowledgebase” on page 266).
- When you open the solution, scroll down to the second paragraph in step one (1), and click **View a sample data file**.

Blackbaud, Inc. | Knowledgebase Powered by Primus eSupport 3.1 - Microsoft Internet Explorer

Address: http://www.blackbaud.com/esupport/consumer/esupport.asp?selected=solutionlist&user=0&trCurrentSymptom=0&trDisplaySymptom=

**Blackbaud** Contact Us | Newsletters | Partners | My Profile Americas

Label: News  
Knowledgebase  
New Search  
Open Solution Number  
Top Solutions (FAQs)  
Knowledgebase Help  
FAQs  
Case Central  
Downloads  
Forums  
Support Newsletters  
User Guides  
System Recommendations

**printer friendly**

Solution Number: **BB15593**  
Applicable Product(s): Raiser's Edge 7  
Solution Title: **How to import gifts in The Raiser's Edge 7**

**Notes:** Before proceeding with the following instructions, we recommend that you [make a backup of the database](#).

If you are new to importing, please review [How to Import \(BB5904\)](#) before proceeding.

1. Create a data file or use an existing file.

**View a sample data file (7GFITS.CSV)** which imports a cash gift paid by check on Philip Keller's record. The import includes all fields to record the check and all required gift fields. You may need to widen the columns to view all of the information in a column.

Although headers are not required in The Raiser's Edge 7, we recommend using them. Otherwise, you must manually map the fields in the data file to the corresponding fields in the Raiser's Edge. You can save the file in any delimited format or in fixed length. However, this example and the sample data file are in [CSV format](#).

2. Include the following fields in the data file (for a sample file, refer to step 1 above):

- Headers**  
ImportID, GiftID, GiftAmt, GiftDate, FundID, CampID, GiftAppeal, GiftType, GiftPayMeth, GiftCheckNum, GiftCheckDate, GiftLtrCode, GiftRet
- Fields**  
Import ID, Gift Import ID, Amount, Gift Date, Fund ID, Campaign ID, Appeal, Gift Type, Payment Method, Check Number, Check Date, Letter Code, Reference

**Notes:** In Excel, use **Text** as the column type fields with a leading zero. Otherwise, Excel drops the leading zeros.

If necessary, link via other fields in the data file that are available for this import home.

http://www.blackbaud.com/files/support/MyRE7Import/7GFITS.CSV Local Intranet

The sample import file for the selected solution appears.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ImportID	GFImplID	GFAMt	GFDate	FundID	CampID	GFAppeal	GFType	GFPayMet	GFCheck	GFCheck	GFTrCode	GFRef		
2	00001-079	C587	100	5/20/2003	2003ANNUAL	ANNUAL	DIRECT M	Cash	Personal	C	12345	5/20/2003	Annual Ch	Annual Donation	
3															
4															
5															
6															
7															

3. You can save the sample import file to your hard drive and use it as a template when creating your import file. To save the file, select **File, Save as** from the menu bar.

## Knowledgebase Solution IDs for Import

This section includes a list of the most popular import solutions available through the Knowledgebase. For instructions on how to access the solutions, see “Accessing the Knowledgebase” on page 266.

### How to import:

- Actions (includes sample data file) **BB55212**
- Actions in a constituent import (includes sample data file) **BB145540**
- Additional addressees/salutations (includes sample data file) **BB12247**
- Address attributes (includes sample data file) **BB80666**
- Address to an existing constituent record using Import (includes sample data file) **BB26213**
- Alumni (includes sample data file) **BB217496**
- Appeals **BB105183**
- Assigned solicitor information (includes sample data file) **BB39747**
- Birth dates **BB105470**
- Business to a non-constituent relationship such as the spouse (includes sample data file) **BB107103**
- Campaigns (includes sample data file) **BB301832**
- Constituency codes (new) or update existing ones (includes sample data file) **BB520386**
- Constituent action notepads (includes sample data file) **BB180464**
- Constituent actions and action notepads in the same import file (includes sample data file) **BB148334**
- Constituent appeals (includes sample data file) **BB27076**
- Constituent attributes (includes sample data file) **BB8670**
- Constituent and spouse in the same file **BB146174**
- Constituent bank relationships (includes sample data file) **BB116666**
- Constituent name, address, and phone numbers including multiple phone numbers and email addresses (includes sample data file) **BB5765**
- Constituents and their primary business information in the same file (includes sample data file) **BB143054**
- Constituents, organization relationships, and organization relationship addresses in the same import file (includes sample data file) **BB118502**
- Education information for a relationship (includes sample data file) **BB74181**
- Education information, including majors and minors, as part of a constituent import (includes sample data file) **BB12704**

- Education/school relationship attributes **BB265586**
- Event participants (includes sample data file) **BB31375**
- Event prices/units **BB49797**
- Events **BB266660**
- Gift attributes onto existing gift records **BB5713**
- Gift benefits (includes sample data file) **BB35135**
- Gift notepads (includes sample data file) **BB50112**
- Gifts (includes sample data file) **BB15593**
- Gift Solicitor **BB101427**
- Guests (include sample data file) **BB148202**
- Individual primary business information using an organization relationship import (includes sample data file) **BB520474**
- Individual relationships that are not constituents (includes sample data file) **BB11495**
- Matching gift factors (includes sample data file) **BB199953**
- Matching gift pledges (includes sample data file) **BB128264**
- Membership benefits (includes sample data file) **BB160005**
- Membership upgrades/downgrades **BB27089**
- Multiple addresses **BB128654**
- Multiple individual relationship attributes in a constituent import (includes sample data file) **BB147303**
- Notepad information (includes sample data file) **BB14618**
- Organization relationships that are constituents (includes sample data file) **BB87260**
- Organization relationships that are not constituents **BB101198**
- Packages **BB4706**
- Participant attributes (includes sample data file) **BB249236**
- Phone numbers/email addresses (new) and update existing ones (includes sample data file) **BB2023**
- Phone numbers for individual relationships **BB55547**
- Phone numbers for organization relationships (includes sample data file) **BB277335**
- Pledge payments (includes sample data file) **BB295982**
- Pledges and recurring gifts with installment schedules (includes sample data file) **BB88502**
- Preferred address (new) to an existing record and move the current preferred address to an alternate **BB141987**
- Primary addressee and salutation (includes sample data file) **BB4397**
- Primary alumni information or an additional (non-primary) education/school record (includes sample data file) **BB116622**
- Proposals **BB142589**
- Proposal solicitors (includes sample data file) **BB49508**
- Prospect ratings (includes sample data file) **BB51086**
- Reciprocal individual relationships that are constituents, contacts, and linked spouses (includes sample data file) **BB23404**
- Registration fees **BB76095**
- Separate individual and organization records in the same file and link them on the individual's Bio 1 Business screen (includes sample data file) **BB143878**
- Soft credits (includes sample data file) **BB53726**

- Solicit Codes (includes sample data file) **BB130209**
- Solicitor(s) for actions **BB90376**
- Split gifts and split gift packages (includes sample data file) **BB121990**
- Volunteer time sheets (includes sample data file) **BB147860**

## How to globally:

- Change recurring gifts **BB4467**
- Delete all Social Security Numbers (includes sample data file) **BB58754**

## How to link:

- Membership and gift information through import **BB43060**

# Glossary



To use **Import** correctly, it is important you have a basic understanding of the different terms used to describe parts of the importing process. If you come across an unfamiliar term when reading this or any information in *The Raiser's Edge* documentation, make sure you consult the online glossary in the help file.

**Action bar.** An action bar is a screen element that contains buttons, such as **New**, **Open**, and **Delete**, you can use to perform quick actions.

**Administration.** *Administration* is a shared area, common to all *The Raiser's Edge* programs, containing options to manipulate your data. With *Administration*, you can monitor system statistics, import and update data, validate your database, and grant or restrict a user's security access to all areas of the program. You can also globally change and delete information to make editing the database quicker.

**Adobe® Acrobat® Reader.** *Adobe® Acrobat® Reader* is a third-party software application that enables electronic distribution of formatted documents. *Adobe® Acrobat® Reader* can be downloaded free from the Adobe Web site.

**Business rule.** A business rule is a system-wide preference you set in *Configuration* to customize standard procedures and requirements. With business rules, you can control functions and displays affecting all users in the program.

**Carriage Return-Line Feed (CR-LF).** A CR-LF indicates a hard break. To insert a CR-LF in your document, press the **ENTER** key on your keyboard. In **Import**, each record in the import file must end with a CR-LF.

**Comma delimited.** Comma delimited is a file format in which fields are separated by commas. It is the file format most often used in **Import**.

**Configuration.** *Configuration* is a shared area of *The Raiser's Edge* you use to set up your system and define settings to customize the program for individual users.

**Database.** A database is a collection of information organized so that a computer program can quickly select desired pieces of data. It works much like an electronic filing system. Traditional databases are organized by fields, records, and files. A field is a single piece of information; a record is a set of fields; and a file is a collection of records.

**Default.** A default is a field entry you select on the Options screen to help increase the ease and speed of data entry by providing a preset value.

**Default Set.** A default set is a record of default transaction information you can create and load in a batch. Once loaded, the defaults appear on the record.

**Delimited.** Delimited is a file format in which fields are separated by characters, commonly commas.

**Dynamic query.** A dynamic query is a query that refreshes and updates results automatically each time the query is run, providing the most current results.

**Extentions.** On the *Import Fields* tab, fields that can be selected more than once have an extension. For example, if in a constituent import, you want to import three constituent codes in the same file with the rest of the constituent information, the fields that are the same have extensions: Constituent Code 01, Constituent Code 02, Constituent Code 03.

**Field.** A field is a data entry box in which you add and store information on records in your database.

**Field separator.** A field separator is a flag the program uses to determine where a field begins and ends. You can use commas, tabs, semicolons, spaces, or other such separators.

**Filter.** A filter is a requirement that records must meet to be included in a query, report, mailing, template, or other grouping. For example, if you apply the Account filter when creating a report, only the accounts you select are included in the report.

**Fixed length.** Fixed length is a file format in which fields in your import are separated based on the number of characters allowed for each field. For example, if you need to import an address update from the post office, you can define the length of each address field — 100 spaces for address block, 15 spaces for city, and five spaces for the ZIP code. If a field exceeds the allotted number of spaces, the information is truncated.

**Home page.** The Home page is a feature common to all *The Raiser's Edge* programs that provides a central location for quick and easy access to all areas of the program. Using links and tabs, you can customize your Home page to display records and functions you use most frequently.

**Import.** An import is the process of moving records from one program into another. With *Import*, you can bring new records into your database and bring updated information into records already in your database.

**Import file.** An import file contains the records you want to import into your database. You can create import files in a number of different programs, including a word processing or spreadsheet program. You must format the information in this file to match the formatting instructions you define in *Import*.

**Import ID.** An Import ID is a unique number used to identify each record in an import. The program uses this ID to reference and update existing records in your database.

**Import parameter file.** An import parameter file defines an import. Through a series of tabs on the Import screen, you define how fields, options, and checkboxes are imported into your database. You can save the parameter file as an import record that can be used again.

**Import type.** An import type determines the field categories available for an import.

**Key Indicator.** The key indicator import field identifies constituent records in your database: I = individual; O = organization. This import field is required if you are adding new constituent records to your database.

**Linked fields.** These fields link fields in the import file with a record in the database or another import file. For example, in *The Raiser's Edge* an action is linked to a specific constituent, appeal, or event in your database.

**Option.** An option is a preference you select that specifies defaults in *The Raiser's Edge*. Options are password-specific and follow the user, regardless of the workstation he logs into.

**Parameter.** A parameter is any field, option, or checkbox that narrows information included in an import, mailing, report, or global change. By specifying parameters, you define the output of the process. You can save parameter files to use again.

**Parameter file.** A parameter file is a set of saved parameters you can save and reuse in *Reports* and *Mail* and other areas of *The Raiser's Edge*.

**Password.** A password is a series of typed characters required to access a computer program. This prevents unauthorized users from entering the program.

**PDF (Portable Document Format).** A PDF is a type of document viewed with *Adobe® Acrobat® Reader* that maintains its formatting and displays correctly on any output device. For example, *The Raiser's Edge* user guides are saved as PDFs and can be printed or accessed from the Help file, Online Manual page of the program, or the installation CD. PDF files contain hyperlinks so you can jump from topic to topic.

**Preferences.** See "Option" on page 272.

**Query.** Query is the means by which you flag, group, and list selected records from your database. You can create dynamic and static queries specific to key areas of *The Raiser's Edge* based on a set of criteria you define. Although queries group entire records, you can limit and sort the output information included in query results. You can use saved queries to limit the information processed in *Records*, *Mail*, and other areas of *The Raiser's Edge*. Using queries in this manner reduces data processing time.

**Query format.** Queries can be created in one of two formats: Dynamic and Static. Static queries search the database and generate a list of records that match the specified criteria at a specific point in time. Dynamic queries search the database and return records that match the criteria using the current database of information.

**Query type.** Query types correspond to specific application records. These vary according to the program you are using. Your selection identifies the record type you want to query and makes a list of that record's fields available for filtering, output, and sorting.

**Record.** A record contains information pertaining to a single constituent, gift, fund, action.

**Reciprocal Relationship.** This is an inverse relationship. For example, if on a constituent record, you enter relationship information about the constituent's son, the reciprocal relationship would be father.

**Security.** *Security* is a shared area in *The Raiser's Edge* in which you establish access rights for users. With *Security* you can control what specific groups of users are allowed to view, add, edit, or delete information.

**Security group.** A Security group is a group of users you define in *Administration*. You control security in *The Raiser's Edge* by creating groups with specific rights and assigning users to groups based on how much system access you want them to have. You can edit the rights of existing groups.

**Server.** A server is a powerful computer or processor dedicated to managing disk drives, printers, or network traffic. Servers are often dedicated, meaning they perform no tasks other than server tasks. For example, a dedicated database server for processing database queries has no other functions besides processing the queries.

**Shell.** The shell is a central area from which you can access all areas of *The Raiser's Edge*. When you click a link to access an area, it appears as a page in the shell.

**Shortcut menu.** A shortcut menu is a list of commonly used commands you can select to quickly perform actions or to display properties. **Open**, **Delete**, **Print**, and **Properties** are common shortcut menu items. To access shortcut menus, place your cursor in a field or grid and click the right mouse button.

**Static query.** A static query is a query that provides a record of query output that existed at the time you established the query. If you run a report two months later using the same query, the system restricts the new output to only the records from the original query. Data entered after the original query is disregarded.

**Status bar.** The status bar is a horizontal strip at the bottom of a screen that displays important messages to assist you in the program. For example, when the cursor is in a field with a table lookup available, "Press F7 for Table Lookup" appears in the status bar.

**Text qualifier.** A text qualifier enables the program to distinguish between actual punctuation in a string of text and the field separator in Import. For example, if you select the comma as your field separator and then try to import an address — 100 Main Street, Suite 23F — the program may think the comma indicates a new field. By placing a text qualifier at the beginning and end of your field, the program knows all text contained between the text qualifiers is part of the same field. In this example, the text qualifier is quotation marks: "100 Main Street, Suite 23F".

**Title bar.** A title bar is a horizontal strip at the top of a screen that identifies a program or file.

**Toolbar.** A toolbar is a horizontal strip with buttons that, when clicked, perform specific tasks. It is located under the title bar at the top of a screen. Common toolbar buttons include **New**, **Open**, **Save**, and **Print**.

**Tree View.** A tree view is a hierarchical list used throughout *The Raiser's Edge*. Tree Views differ from standard lists in that items in a tree view contain branches represented by dotted lines. Some tree views automatically display all branches; for others you must click a plus sign to view the branches.

**User option.** See "Option" on page 272.

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