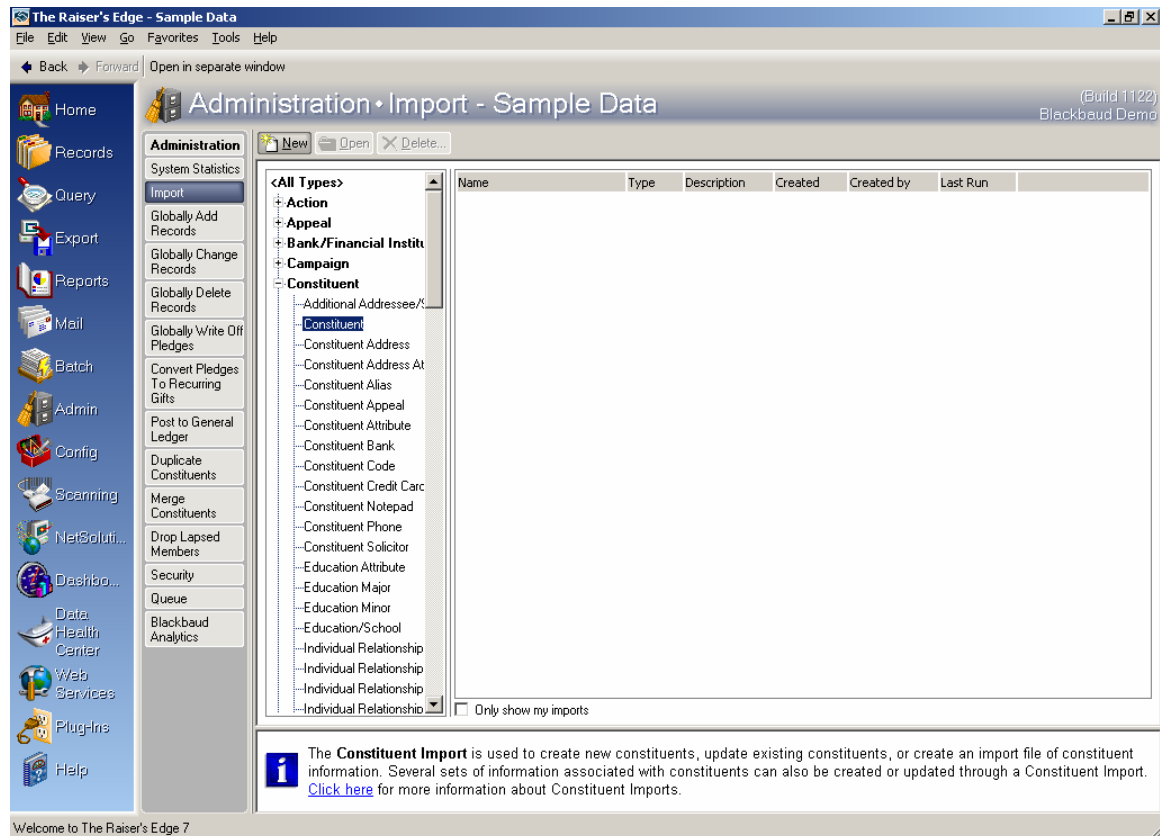


Importing WealthPoint Information into The Raiser's Edge with Search

Note: Before proceeding with the following instructions, we recommend that you make a **valid backup of the database**. For instructions, refer to Knowledgebase solution BB94455:

<http://www.blackbaud.com/esupport/esupport.asp?resource=&number=0&id=BB94455>

1. Save the zipped import file provided by Blackbaud Analytics to the local workstation and extract the data file. For instructions on unzipping, refer to Knowledgebase solution BB546:
<http://www.blackbaud.com/esupport/esupport.asp?resource=&number=0&id=BB546>
2. In The Raiser's Edge, click Admin, Import and select Constituent from the Constituent node. Click New.



3. On the General tab, select the following options:

What do you want to do?: Update Existing Records

Options: Create New Table Entries

What file do you wish to import?: Browse to the unzipped import file from step 1. When browsing for the file, set the Files of Type to "All Files" or "Text Files (*.txt, *.csv, *.prn)".

How do you want the system to identify existing constituents: Use the Import ID

What is the format of this import file?: Delimited

Import - WealthPoint import

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 reciprocate relationships

☐ Use duplicate criteria for new records

What file do you wish to import?

Import file: WealthPoint_import.csv

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 Update Now

4. On the File Layout tab, keep the defaults:

Field Separators and Text Qualifiers: Comma

Text Qualifier: Quotation

Import Field Names: Field names are on the first line of the import file

The screenshot shows the 'Import - WealthPoint import' dialog box with the 'File Layout' tab selected. The 'Field Separators and Text Qualifiers' section has 'Comma' selected as the field separator and 'Quotation' as the text qualifier. The 'Import Field Names' section has 'Field names are on the first line of the import file' selected. The 'Sample Import Format' section displays a table with 5 columns: ImportID, PRateSource, PRateDate, PRateCat, and PRateDesc. The table contains three rows of data, with the first two rows being visible in detail.

Field Separators and Text Qualifiers

☒ Comma Text qualifier: **Quotation**

☐ Tab

☐ Semicolon

☐ Space

☐ Other

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.

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

ImportID	PRateSource	PRateDate	PRateCat	PRateDesc
00001-079-0000190	Blackbaud Analytic...	6/21/06	Annual Giving Cap...	\$501 - \$1000
00001-079-0000196	Blackbaud Analytic...	6/21/06	Annual Giving Cap...	\$501 - \$1000
00001-079-0000200	Blackbaud Analytic...	6/21/06	Annual Giving Cap...	\$501 - \$1000

< Back Next > Cancel Save Update Now

5. On the Fields tab, the fields should automatically map as shown below. In the “Import Fields” section, the “Field to Import” is the header from the import file and “Raiser’s Edge Field” is the field it is mapped to in the program.

Import - WealthPoint import

File Edit View Favorites Tools Help

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

Indicate where each 'Field to Import' should go by choosing the Raiser's Edge Field from the list of 'Available Fields'

Available Fields

Show: <All fields>

- + Additional Addressee/Salutati...
- + Address Attribute
- + Address
- + Alias
- + Appeal
- + Availability
- + Award
- + Checklist
- + Constituent Attribute
- + Constituent Bank
- + Constituent Code
- + Constituent
- + Course/Training
- + Credit Card
- + Education Major

[Click here](#) for detailed field information.

Find... Select ->

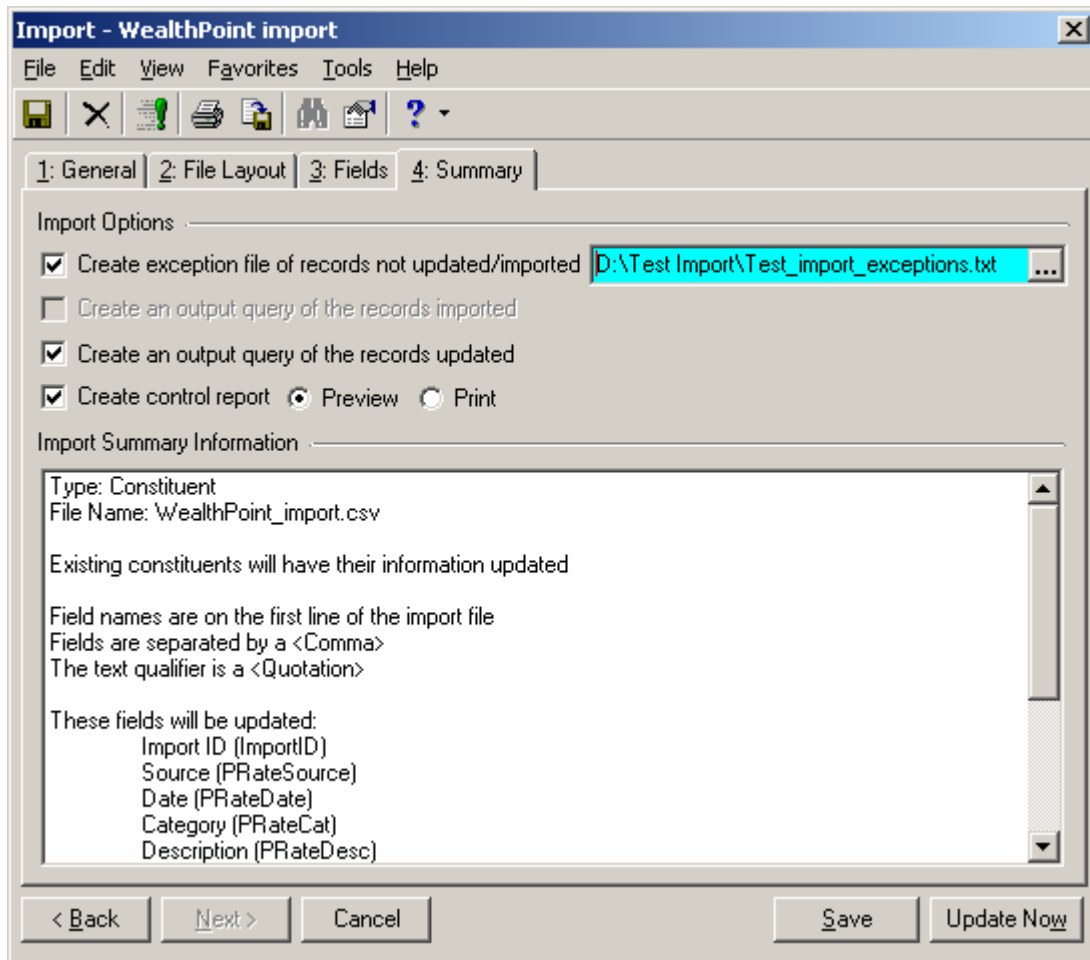
Import Fields

Field to Import	Raiser's Edge Field	Extens...
ImportID	Import ID (ImportID)	
PRateSource	Source (PRateSource)	00
PRateDate	Date (PRateDate)	00
PRateCat	Category (PRateCat)	00
PRateDesc	Description (PRateDesc)	00
POGOrgName	Organization Name (PO...	00
POGOrgType	Organization Type (PO...	00
POGAmt	Amount (POGAmt)	00
POGDateGiven	Date Given (POGDateG...	00
POGReason	Reason (POGReason)	00
POGCom	Comments (POGCom)	00
PFIType	Information Type (PFIT...	00

<- Remove Update Fields Clear Fields

< Back Next > Cancel Save Update Now

6. On the Summary tab, we recommend selecting all of the available import options:
- Create exception file of records not updated/imported
 - Create an output query of the records updated
 - Create control report and Preview



7. Click update now. When prompted, select a name for the output query and click the Save button.