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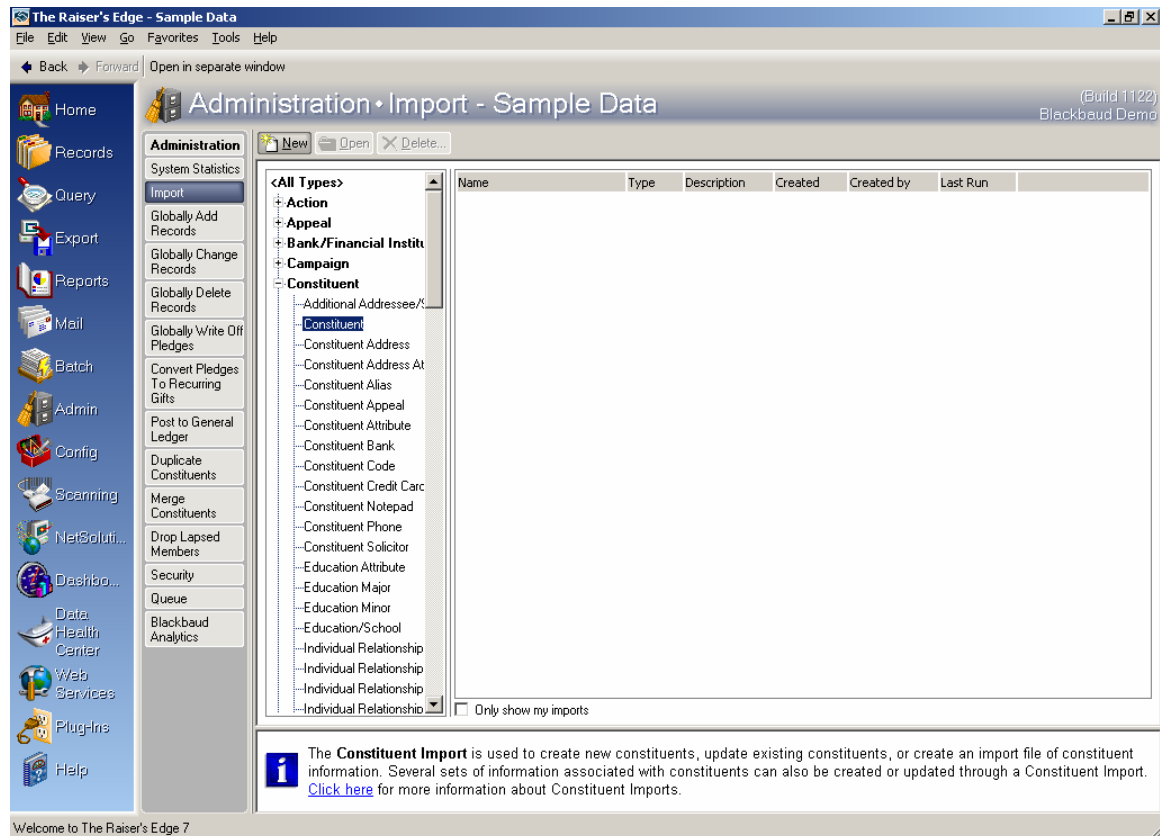
3. On the General tab, select the following options:

    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

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

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.

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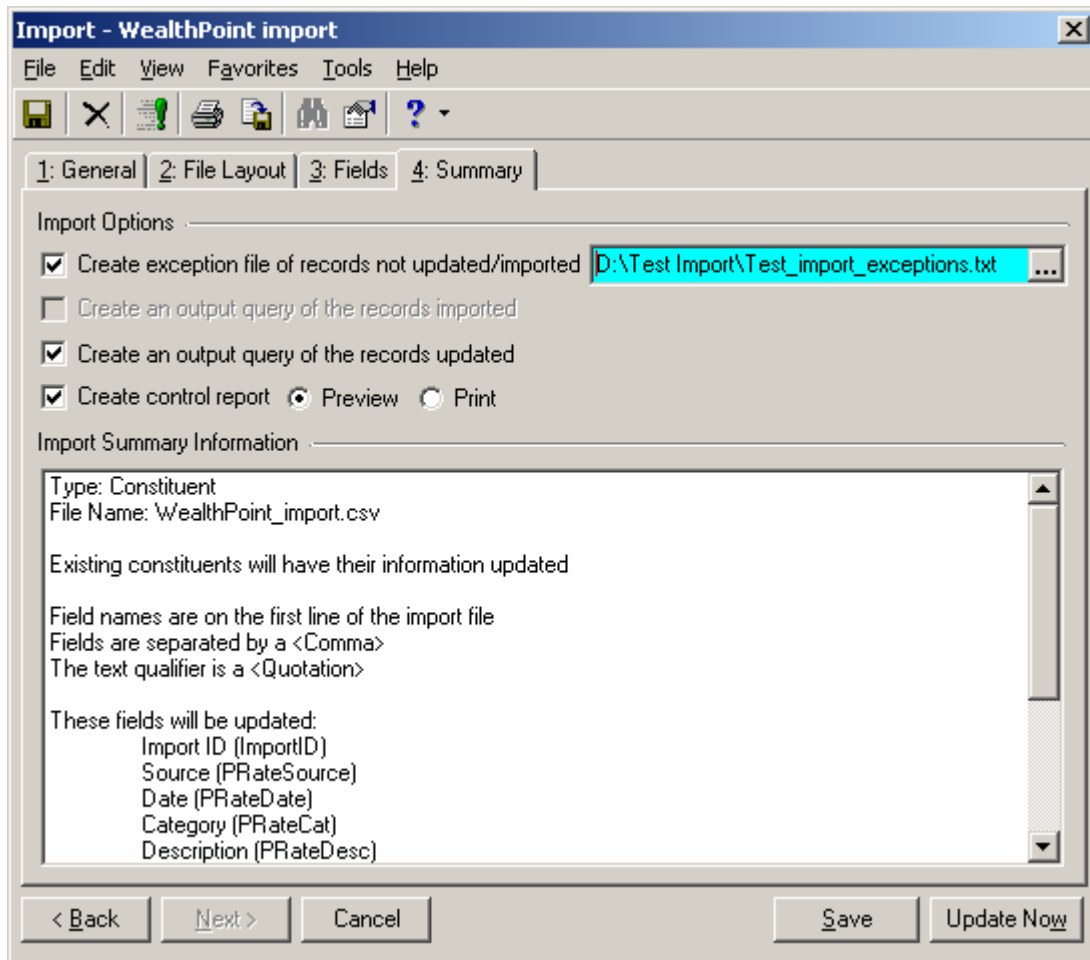
7. Click update now. When prompted, select a name for the output query and click the Save button.