

Canadian AddressFinder Guide

05/24/2016 eTapestry 7.22.0 Canadian AddressFinder US

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Contents



- Canadian AddressFinder™ (NCOA®) Workflow Guide 4**
- Canadian AddressFinder (NCOA) 5
- Create Queries for Updated Canadian Addresses 12
- General Import Setup 18
- Data Return Types 24

Canadian AddressFinder™ (NCOA®) Workflow Guide



Canadian AddressFinder (NCOA)	5
Create Queries for Updated Canadian Addresses	12
General Import Setup	18
Import Types	20
Data Return Types	24

This guide covers all the procedures that Canadian *eTapestry* clients should follow to run AddressFinder™ (NCOA®).

Canadian AddressFinder (NCOA)

You can purchase Canadian AddressFinder (NCOA) services to ensure that information about your constituents is up to date. AddressFinder (NCOA) services are included in all Essentials and Pro packages. When you keep addresses updated, you save money on mailings and may also qualify for postal discounts. For information about the number of Canadian AddressFinder (NCOA) runs remaining for your organization, contact your *Blackbaud* Sales associate.

Warning: If you track multiple constituents with a single account, the joint account may not be updated by this process. If an account uses a nickname that differs from the constituent's name in the NCOA database, the address is not updated. Non-Canadian addresses are not updated by this process. Only users with admin rights can run the Canadian AddressFinder (NCOA) service.

Canadian *eTapestry* clients should follow these procedures to update constituent addresses.

1. Create a custom Canadian AddressFinder (NCOA) report. For details, refer to [Create a custom Canadian AddressFinder™ \(NCOA®\) report on page 7](#).
2. Run the custom Canadian AddressFinder (NCOA) report to export constituent information. For details, refer to [Export constituents with Canadian addresses on page 8](#).
3. Follow the procedures in this [Knowledgebase solution](#). After **Target Analytics** analyzes and updates the addresses, you receive results you can import into your database.

Note: In addition to your import file, you may also receive a CSV file that contains addresses which were rejected from the Canadian AddressFinder (NCOA) process. You do not need to import addresses that are rejected. These addresses were not analyzed. These addresses may be international addresses. If you have other methods of contacting these constituents, we recommend you do so to verify these addresses manually.

4. Set up user-defined fields associated with the Canadian AddressFinder (NCOA) import process. For details, refer to [Create user-defined fields to import Canadian addresses on page 9](#).
5. Import updated constituent addresses. For details, refer to [Import updated Canadian addresses on page 10](#).
6. Create queries to identify constituents whose addresses were updated. For details, refer to [Create Queries for Updated Canadian Addresses on page 12](#).
7. Run a mass update to update the mailing status for constituents whose addresses were corrected by the Canadian AddressFinder (NCOA) service. For details, refer to [Clear "Bad Address" user-defined fields on page 14](#).
8. Run a mass update to update the mailing status for constituents whose addresses could not be corrected by the Canadian AddressFinder (NCOA) service. For details, refer to [Mark "Bad Address" user-defined fields on page 15](#).

Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for

other queries to further define mailing lists. For more information, refer to [Create a "Do Not Mail" query on page 16](#) and [Create a "Clean Mailing List" query on page 17](#).

> Create a custom Canadian AddressFinder™ (NCOA®) report

1. From **Reports**, select a category in which to store the report definition. Consider creating a category called "Canadian AddressFinder™ (NCOA®)" or "Accounts."
2. From the report category, click **New Report** under **Tasks**. The Create a New Report page appears.
3. Enter a name for the report definition, such as "Canadian AddressFinder (NCOA)."
4. Enter a description to help other users understand what the report contains and how the information should be used. You use this report to export constituents addresses, and you send the export file to **Target Analytics**.
5. You can also select to mark the report as Private, Read Only, or a Favorite.
6. Under **Available Fields**, select the **Account Fields** category.
7. Select the following fields.
 - **Account Name**
 - **Address Line 1**
 - **Address Line 2**
 - **City**
 - **State**
 - **Postal Code**
 - **Persona Type**
 - **Account Number**
 - **Sort Name**
 - **Name Format**
8. Under **Group Report By**, select **Do Not Group**.
9. Adjust the report columns as necessary.
 - Click + next to Sort Name name under Selected Fields. The row expands and additional options appear. Click the eye icon to make the column visible in the report.
 - To reorder columns, select the column name. Then drag and drop the column to the required location.
10. Click **Save and**. You are ready to run the report.

Tip: You'll use this report definition every time you export constituent information for Canadian AddressFinder (NCOA).

> Export constituents with Canadian addresses

1. From **Reports**, select a category in which the report definition is stored. This is probably a category called "Canadian AddressFinder (NCOA)" or "Accounts."
2. Under the report definition, click **Run Report**. The report definition is probably called "Canadian AddressFinder (NCOA)."
3. Select the **Base** query category.
4. Select the **All Constituents** query.
5. Select to remember the query for the next time you run the report.
6. Under Export As, select **Transactions**.
7. Under Personas Reported, select **All**.
8. Under Export Format, select **Export as Tab-delimited**.
9. Under Delivery Options, select **Excel** or **CSV** report format.

You can choose to download the export file, receive the file as an email attachment, or save the file to your **eTapestry** dropbox. If you choose to receive the export file by email, enter your email address and a subject.

10. Schedule the report for off-hours or click **Submit** to launch it now.

Note: When the report processes, you cannot start additional queries, reports, or exports until after the export file is generated.

> Create user-defined fields to import Canadian addresses

1. From **Management**, click **User Defined Fields** under Database Configuration.
2. Under Tasks, click **New Category**.
3. For Name, enter "Canadian AddressFinder (NCOA) Codes."
4. Click **Save And View All Categories**.
5. Under the category you created, click **New Field**.
6. For Name, enter "Canadian AddressFinder (NCOA) Codes."
7. Enter a description to help other users understand what information the field contains and how it should be used. You'll use this field to track when the Canadian AddressFinder (NCOA) updates a constituent's address.
8. For Data Type, select **Text**.
9. Click **Next**.
10. Under Field Application, select **Notes** for Journal Types.
11. Select **Personas** for Other.
12. Click **Next**.
13. Under Field Attributes, you can select to enable users to search based on this field using Advanced Find.
14. You can select to make this field visible in **eTapestry** Mobile.
15. Click **Next**.
16. Under Display Type, select **Allow assignment of only one value**.
17. Click **Next**.
18. If your organization uses the Advanced Security module, you can limit which users can see and use this field.
19. Click **Next**.
20. To add a value, enter the value name and then click **Add Value**. Add these values:
 - Address Updated (Corrected)
 - Address Standardized (Valid)
 - Invalid Address
 - Move Identified, Address Cannot Be Updated (Not Corrected)
21. Click **Next**. The field and its values are saved.

> Import updated Canadian addresses

1. Ensure that the import file meets the General Import Set Up requirements. For details, refer to [General Import Setup on page 18](#).
2. From **Management**, click **Import**. The Import Categories page appears.
3. Select an import category. Consider creating a category called "Canadian AddressFinder (NCOA)" or "Accounts."
4. Select your "Canadian AddressFinder (NCOA)" import template. The Import page appears.

Tip: To create a new template, click **New Import** under Tasks. The Import page appears. Then enter a unique name for the import, such as "Canadian AddressFinder (NCOA)" You'll use this same import definition every time you import updated constituent addresses from Canadian AddressFinder (NCOA).

5. Enter a description. For example, "Constituent addresses were provided to **Target Analytics** for Canadian AddressFinder (NCOA) services. Use this import to update the addresses."
6. Click **Browse...** and select the .csv file which contains the latest AddressFinder™ results.
7. Under **Select the Type of Information to Import**, select **Account Information with Single Note**.
8. In the **Multi Select Delimiter** field, use the default settings.
9. Click **Next** to continue to the next step. The Map your Import File screen appears.
10. The required fields for Account Information with a Single Note import type appears. You must map data to these required fields. You'll also map data to user-defined fields you set up to track Canadian AddressFinder (NCOA) Codes.
 - On the **Persona Type** field, you can map a field from your source file or, if all your imported accounts have the same persona type, you can type in that persona type in the field provided under the Import Data column.
 - To map to a field in the source file, click the icon to the right of the Import Data field. You must click the icon next to the specific field you want to map to. The Select Import Field window appears with a list of all column titles from your source file. Click the appropriate column to map from your source file, and close the Select Import Field screen.
 - You sometimes need to map more than one field from your source file to the same field in **eTapestry**. For example, if you have a column for First Name and a column for Last Name on your source file, you must map both those columns to the **eTapestry** field **Account Name**. To do this, click the icon and select the First Name field, enter a space, and select the Last Name field. You can do the same for the **Sort Name** field, although in that case you map the Last Name field first, enter a comma and a space, and then map the First Name field.
 - After you map all the required fields, you can select additional fields to map. To select an additional **eTapestry** field to map to, click **Import Another eTapestry Field**. The Select eTapestry Field screen appears. You can scroll to find a field or use the search box if you know the field name. The list includes all eligible fields for this import type, including

user-defined fields. You can use as many of these fields as you want in your import.

After you select the fields you want to add to the import, you must map them to a column from your source file. To do this, click the icon to the right of each field and select the appropriate column.

- To delete any additional fields after you add them to the mapping, click the red X next to the field you want to delete. You cannot delete required fields.
- As you map fields, you can view a sample on the right of the screen. Use this to confirm you are mapping fields correctly. You can review all your mapped data on Step 3 of the import wizard.

11. Under **Key**, select the **Account Number** and **Persona Type** as duplicate keys.

Note: *eTapestry* uses duplicate keys to search for potential duplicates on those fields. Later, you review potential duplicates and indicate how to handle them in the import. You cannot submit an import without at least one duplicate key.

12. Click **Next**. The Preview page appears to show the first 25 lines of the import. View the exact data that will be mapped to your *eTapestry* database. To correct mapping errors, click **Back** to return to step two and re-map your data.

13. After you preview the data, click **Next**. The Possible Duplicates Report appears.

Note: If your import file has errors, an error screen appears first. In this case, correct the errors and begin your import again.

14. The report shows potential duplicates in your import based on the duplicate key(s) you previously selected. To handle each potential conflict, select **Replace**.

All data from your import source file is moved into the fields that you mapped on the existing account, regardless of whether or not those fields already contain data. No new account is created. Empty fields from your import source file do not replace fields with data in the existing account.

15. Click **Next** to commit the changes and begin the import. The data is imported and the constituent addresses are updated.

Warning: After you commit your import file, you cannot reverse your import. Be sure that all options are correct and that you are ready to perform the import before you click **Next**.

Create Queries for Updated Canadian Addresses

Create a query for each code used to classify the results of the Canadian AddressFinder (NCOA) process.

- Move Identified, Address Updated
- Address Standardized
- Invalid Address
- Move Identified, Address Cannot Be Updated

You'll use the Address Updated and Address Standardized queries to identify constituent addresses that were updated by the process. If you use a user-defined field called "Mailing status" to track which constituents have bad addresses, you will also use these queries to run mass updates after each Canadian AddressFinder (NCOA) run.

We recommend you use the Invalid Address and Move Identified queries to locate personas whose addresses have become invalid. If you have other methods of reaching the constituents, contact them to request updated addresses.

> Create a query for updated Canadian addresses

1. From the Queries tab, click **Manage Queries**. The Query Categories page appears.
2. Click on a category to select it, or to create a new category click **New Category** under Tasks. Consider creating a category called "NCOA Codes." After you access a category, the Edit Query Category page appears.
3. Click **New Query** under Tasks. The Create a New Query page appears.
4. Enter a name for the query. The name should correspond to the Canadian AddressFinder (NCOA) code.
5. Enter a description for your query. Be as descriptive as possible so that you and other users in your organization know what the query includes and how it should be used.
6. Under Starting Criteria, select **Base** for the query category.
7. Select the **All Accounts**.
8. For Data Return Type, select **Accounts**. For more information about data return types, see [Data Return Types on page 24](#).
9. Select to match all of your criteria.
10. Under Personal Options, select whether you want to look for matches to your criteria in all persona types, only the primary persona, or only one persona type.
11. Under Type, select Dynamic. Dynamic queries reflect updated data every time you run them or use them to send communications or run reports. You'll be able to use this same query after each Canadian AddressFinder (NCOA) run.
12. To hide this query from other users in your organization, select **Private**.
13. To prevent other users in your organization from editing this query, but allow them to see it and

use it, select **Read Only**.

14. To mark this query as a favorite, select **Favorite Query**. Links to your favorite queries appear on your **eTapestry** home page when you use the Favorites tile.
15. Under Available Fields, select the **UDFs - Persona category**.
16. Locate the category you previously created for user defined fields; it is probably called "Canadian AddressFinder (NCOA) Codes."
Under the category, select the user-defined field that you previously created. The field is probably called "Canadian AddressFinder (NCOA) Codes."
17. For each query, select the corresponding code.
 - Address Updated (Corrected)
 - Address Standardized (Valid)
 - Invalid Address
 - Move Identified, Address Cannot Be Updated (Not Corrected)
18. Click **Save And** to save the query.

> Clear "Bad Address" user-defined fields

If you use a user-defined field called "Mailing status" to track which constituents have bad addresses, we recommend you run a mass update after each AddressFinder (NCOA) run.

1. From **Management**, click **Mass Update**. The Mass Updates page appears.
2. Under **Update Existing Items**, click **Update Existing Accounts**.
3. Select the category that corresponds to AddressFinder (NCOA).

Tip: For *eTapestry* clients in the United States your category is probably called "AddressFinder (NCOA) Codes." For Canadians, use the queries you created for each code. Refer to [Create Queries for Updated Canadian Addresses on page 12](#).

4. Select the query that contains the addresses changed by AddressFinder (NCOA). Include addresses with the following NCOA codes:
 - Address Standardized (Valid)
 - Address Updated (Corrected)
5. Under **Update Type**, select **Remove**. This will clear the Bad Address value from the **Mailing Status** field for constituents whose addresses were corrected by the AddressFinder (NCOA) run.
6. For Account Values, click **Mailing Status** under Base. Then, select the Bad Address value from the menu that appears.
7. Click **Next**. A preview summary appears so you can verify the number of accounts that will be updated.
8. Click **Next** to run the mass update. Accounts whose addresses were corrected by AddressFinder (NCOA) are no longer marked as having bad addresses.

Warning: While the mass update is in progress, users cannot access the affected records. We recommend you run the mass update when users are typically inactive. You can log out while the mass update is in progress.

> Mark "Bad Address" user-defined fields

You can use a user-defined field called "Mailing status" to track which constituents have bad addresses. We recommend you run a mass update after each AddressFinder (NCOA) run. When you send mail, exclude accounts with bad addresses.

1. From **Management**, click **Mass Update**. The Mass Updates page appears.
2. Under **Update Existing Items**, click **Update Existing Accounts**
3. Select the category that corresponds to AddressFinder (NCOA).

Tip: For *eTapestry* clients in the United States your category is probably called "AddressFinder (NCOA) Codes." For Canadians, use the queries you created for each code. Refer to [Create Queries for Updated Canadian Addresses on page 12](#).

4. Select the query that contains the addresses changed by AddressFinder (NCOA). Include addresses with the following NCOA codes:
 - Invalid Address
 - Move Identified, Address Cannot Be Updated (Not Corrected)
5. Under **Update Type**, select **Assign**. This selects the "Bad Address" value from the Mailing Status field for constituents whose addresses could not be corrected by the AddressFinder (NCOA) run.
6. For **Account Values**, click **Mailing Status** under **Base**. Then, select the Bad Address value from the menu that appears.
7. Click **Next**. A preview summary appears so you can verify the number of accounts that will be updated.
8. Click **Next** to run the mass update. Accounts whose addresses were marked invalid by AddressFinder (NCOA) are marked as having bad addresses.

Warning: While the mass update is in progress, users cannot access the affected records. We recommend you run the mass update when users are typically inactive. You can log out while the mass update is in progress.

Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to [Create a "Do Not Mail" query on page 16](#) and [Create a "Clean Mailing List" query on page 17](#).

> Create a "Do Not Mail" query

When you send mail, do not send items to accounts with bad addresses, accounts who opted out of your mailings, and the deceased. To do this, you'll first create a basic query which identifies the accounts you want to exclude.

1. From **Queries**, click **Manage Queries**. The Query Categories page appears.
2. Click on a category to select it, or to create a new category click **New Category** under Tasks. After you access a category, the Edit Query Category page appears.
3. Click **New Query** under Tasks. The Create a New Query page appears.
4. In the **Name** field, enter "Do Not Mail."
5. Enter a description so that you and other users in your organization know what the query is used for. This query identifies accounts with bad addresses, accounts who opted out of your mailings, and the deceased. You'll use this query to create a compound query which you'll use to send mail.
6. Select **Change Query Type** under **Query Type** and select **Dynamic Query**.
7. Under **Starting Query**, select Base as the category.
8. In the **Query** drop down field, select All Constituents - A.
9. From **Data Return Type**, under **Results**, select Accounts. For more information about data return types, see [Data Return Types on page 24](#).
10. Under **Criteria Options**, select **Match at least one criteria**.
11. From **Criteria**, in the drop down field, select UDFs - Constituent and then click **Mailing Status**.
12. Select the statuses which should not receive mail.
 - **Do Not Mail**
 - **Bad Address**
 - **Deceased**

If the mailing is an appeal for fundraising or sales, also select **Do Not Solicit**

13. Click **Save and** to save the query and navigate to the page selected in the Save And menu. You are ready to use this "Do Not Mail" query to create a compound query, which you use to send mail. For information about how to create a "Clean Mail" compound query, refer to [Create a "Clean Mailing List" query on page 17](#).

> Create a "Clean Mailing List" query

When you send mail, do not send items to bad addresses, constituents who opted out of mailings, and the deceased. To send mail to a clean list, first create a query that identifies the accounts to exclude. When the mailing is an appeal for fundraising or sales, you should also exclude accounts marked as **Do Not Solicit**. For more information, refer to [Create a "Do Not Mail" query on page 16](#). Next, create a compound query that includes the accounts you want to send mail to, but excludes the accounts you need to prevent from receiving the mail.

1. From the **Queries**, click **Manage Queries**. The Query Categories page appears.
2. Click on a category to select it, or to create a new category click **New Category** under Tasks. After you access a category, the Edit Query Category page appears.
3. Click **New Compound Query** under **Tasks**. The Create a New Compound Query page appears.
4. For the **Name**, enter "Clean Mailing List. "
5. Enter a description so that you and other users in your organization know what the query is used for. You can use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries if you need to further define your mailing lists. This is a compound query which subtracts the "Do Not Mail" query from the "All Constituents" query.
6. Select **Change Query Type** under **Query Type** and select **Dynamic Query**.
7. From **Data Return Type**, under **Results**, select Accounts. For more information about data return types, see [Data Return Types on page 24](#).
8. Under **How would you like the results of each query to interact?**, click **Subtract**.
9. Under Query 1, for **Query Category** select Base. For **Query**, select All Constituents - A.
10. Under Query 2, for **Query Category** select Base. For **Query**, select Do Not Mail.
11. Click **Save and** to save the query and navigate to the page selected in the Save And menu. You are ready to use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries if you need to further define your mailing lists.

General Import Setup

Before you begin an import, you must set up your import source file. Refer to this information to set up your file correctly.

> Import Guidelines

- To import successfully, select a comma separated file (.csv) file. If you have a Microsoft *Excel* file, you can save it as a .csv file in *Excel*.

eTapestry does not support the following file types for import.

- DOC
- DOCX
- Files created by Google *Docs*
- Files created by Mac *Sheets*
- ODF
- ODS
- PDF
- XLS - To convert this file type to .csv, open it in *Excel*, and select to save it as a .csv file.
- XLSX - To convert this file type to .csv, open it in *Excel*, and select to save it as a .csv file.
- The file must have no more than 2,000 lines. If you need to import more records, use separate files of 2,000 lines or less and perform separate imports for each file.
- The file must have column headers. **eTapestry** uses the column headers to map columns to fields in the database. Use descriptive column headers to make mapping easier. Never put data that you want to import on the first line of the import source file.
- The file cannot contain blank lines. Any blank lines create an error in the import process.
- To avoid import difficulty, make sure you remove line breaks within the fields or any fields that contain quotes.
- Each import type has a number of required fields and your source file must contain information you can map to required fields. For example, Account Information types require the **Country** field. For more information required fields for import types, refer to [Import Types on page 20](#).
- If you plan to import addresses, make sure that your import file only includes addresses from one country. If you need to import addresses from other countries, create a separate import file and import definition for each country.
- If you plan to import values into fields with fixed values (such as drop down menus or checkboxes), the values in the import source file must match the values in the database exactly. For example, if you import a fund value, the value in your file must match an existing fund in your database. These values are case-sensitive, and it must be spelled exactly the same.
- If you plan to import user-defined values into a multiple selection field, you must delimit them

in the import source file. In this case, use a single field for all the values, and separate them with one of the available characters. You must use the same delimiter throughout your import source file.

- asterisk (*)
- pipe (|)
- comma (,)
- semicolon (;)
- tilde (~)

Import Types

When you create an import, you select the type of information you want to import. The import type determines what information you can load into your database and what fields are required. You cannot change the import type for an existing import, so if you select the wrong import type, you must start a new import.

Note: You cannot update existing data on gifts with any import type. To update existing information in your database, you must perform a mass update. For more information, refer to [Mass Updates on page 1](#).

Import Type	Details	Required Fields
Account information	<p>This basic import allows you to import new constituent accounts or update information for existing accounts in your database.</p> <p>When you import accounts, make sure you key on Account Name and Persona Type to check for duplicate accounts. You should also key on either the Address or Postal Code field to make sure updates import to the correct existing accounts.</p>	<ul style="list-style-type: none"> • Account Name • Country • Last Name (Individuals only) • Name Format • Persona Type • Sort Name

Import Type	Details	Required Fields
Account information with single gift	<p>Use this import to create one-time gifts for new or existing accounts.</p> <p>When you import gifts for existing accounts, make sure you key on Account Name to check for duplicate accounts by name. You should also key on either the Address or Postal Code field to make sure gifts import to the correct existing accounts.</p> <p>Do not use this import to update existing gifts or to import recurring gifts or pledges.</p>	<ul style="list-style-type: none">• Account Name• Country• Date• Fund• Gift type• Last Name (Individuals only)• Name Format• Persona Type• Received• Sort Name
Account information with single note	<p>Use this import to add new accounts with a journal note.</p>	<ul style="list-style-type: none">• Account Name• Country• Date• Last Name (Individuals only)• Name Format• Note• Persona Type• Sort Name

Import Type	Details	Required Fields
Account information with single contact	Use this import to add new accounts with a journal contact item.	<ul style="list-style-type: none"> • Account Name • Contact Method • Country • Date • Last Name (Individuals only) • Name Format • Note • Persona Type • Sort Name • Subject
Account information with single declaration	<p>Use this import type to enter new accounts with a Gift Aid declaration.</p> <p>This import type is only available for customers in the United Kingdom who need to import Gift Aid declaration. You must select the United Kingdom as your locale under user preferences in order to see this import option.</p>	<ul style="list-style-type: none"> • Account Name • Confirmation Date • Country • Date • Declaration Type • Last Name (Individuals only) • Name Format • Persona Type • Sort Name • Valid From

Import Type	Details	Required Fields
Account information with single recurring gift schedule	Use this import to add accounts with a recurring gift schedule. Recurring gift schedules added through this import default to manual processing, and the first payment is not applied through the import.	<ul style="list-style-type: none"> • Account name • Country • Date • First installment Date • Frequency • Fund • Installment Amount • Last Name (Individuals only) • Name Format • Persona type • Sort name
Single gift by account number	Use this import to add a one-time gift to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can create a custom report for a query of those accounts.	<ul style="list-style-type: none"> • Account Number • Date • Fund • Gift type • Received
Single note by account number	Use this import to add a journal note to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can create a custom report for a query of those accounts.	<ul style="list-style-type: none"> • Account Number • Date • Note
Single contact by account number	Use this import to add a journal contact to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can create a custom report for a query of those accounts.	<ul style="list-style-type: none"> • Account Number • Contact method • Date • Note • Subject

Import Type	Details	Required Fields
Single declaration by account number	<p>Use this import type to enter Gift Aid declarations to existing accounts by account number.</p> <p>This import type is only available for customers in the United Kingdom who need to import Gift Aid declaration. You must select the United Kingdom as your locale under user preferences in order to see this import option.</p>	<ul style="list-style-type: none"> • Account Number • Confirmation Date • Date • Declaration Type • Valid From
Single recurring gift schedule by account number	<p>Use this import to add a recurring gift schedule to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can create a custom report for a query of those accounts.</p> <p>Recurring gift schedules added through this import default to manual processing, and the first payment is not applied through the import.</p>	<ul style="list-style-type: none"> • Account Number • Date • First installment Date • Frequency • Fund • Installment Amount
Update recurring gift schedule	<p>Use this import to update the installment amount for existing recurring gift schedules. You must know and include the journal entry reference number for the recurring gift schedules you want to update.</p> <p>You can only update recurring gift schedules that are processed manually. Recurring gift schedules that are configured to process automatically cannot be updated via import.</p>	<ul style="list-style-type: none"> • Installment amount • Journal entry ref

Data Return Types

A query's Data Return Type determines whether the query returns accounts or journal entries. Although data return types can only ever return either accounts or journal entries, there are six different data return types, and each returns different accounts or journal entries based on a different set of rules.

Accounts or Journal Entries	Data Return Type	Details
Account	Accounts	The Account data return type returns only the accounts that meet the selected query criteria.

Accounts or Journal Entries	Data Return Type	Details
Account	All Household Accounts	The All Household Accounts data return type returns the accounts that meet the selected query criteria, plus any other accounts that are connected to those accounts via a household relationship.
Account	Head of Household Accounts	The Head of Household Accounts data return type first locates the accounts that meet the selected query criteria. Then, it looks to see if those accounts are in a household relationship. If so, the query returns whichever account is listed as the primary/head of household in that relationship. If the account is not in a household relationship, it is considered to be the primary/head of household account, and the query returns it in the results.
Account	Related Accounts	<p>The Related Accounts data return type is used to locate accounts that are related to other accounts via a certain relationship type. It first finds the accounts that meet your selected query criteria. Then, it looks at the selected relationship type and the selected side of the relationship in the Relationship Info fields, and it returns the accounts that have that relationship with the accounts that meet your query's criteria.</p> <p>For example, let's say that you have set up Solicitor/Constituent relationships between your staff and board members and your donors. Now you want to locate the solicitors of all constituents who have donated over \$10,000 to your organization over their lifetime so that you can talk to those solicitors about their methods and see how they are able to promote such high giving. First, you set up your query to use the Cumulative Received field to find all constituents who have given \$10,000+. Then, you set the data return type to Related Accounts, select the relationship type to Solicitor/Constituent, and select that you want the Solicitor half of the relationship. The query will then locate the Solicitors of the \$10,000+ givers.</p> <p>For example, let's say that you have set up Solicitor/Constituent relationships between your staff and board members and your donors. Now you want to locate the solicitors of all constituents who have donated over \$10,000 to your organization over their lifetime so that you can talk to those solicitors about their methods and see how they are able to promote such high giving. First, you set up your query to use the Cumulative Received field to find all constituents who have given \$10,000+. Then, you set the data return type to Related Accounts, select the relationship type to Solicitor/Constituent, and select that you want the Solicitor half of the relationship. The query will then locate the Solicitors of the \$10,000+ givers.</p>
Account	Matching Gift Accounts	The Matching Gift Accounts data return type is used to locate accounts that are related to other accounts via a Matching Gift relationship. It first finds the accounts that meet your selected query criteria. then, it looks at the relationships on those accounts, and returns any accounts that are related to those accounts via a matching gift relationship.

Accounts or Journal Entries	Data Return Type	Details
Journal Entries	Journal Entries	The Journal Entries data return type returns only the journal entries that meet the selected query criteria.
Journal Entries	All Household Journal Entries	The All Household Journal Entries data return type first locates the accounts that meet the selected query criteria. Then, it returns 'all journal entries on those accounts, plus all journal entries on any accounts that are connected to those accounts via a household relationship.
Journal Entries	Household Journal Entries Per Criteria	The Household Journal Entries Per Criteria data return type first locates and returns the entries that meet the selected query criteria. Then, it looks at any accounts that are connected to those accounts via a household relationship, and it returns the journal entries on those accounts that also meet the selected journal entry criteria on the query.