

Advanced Import Toolkit

The Import module is a wonderful tool that allows you to add, update, or modify your existing eTapestry database using external data files. There are several common uses for the Import including:

- Recurring data imports – utilize a recurring import when you need to regularly add accounts from another data source.
- Data updates and appends – add and update existing account information in mass from an outside data source
- Offline data entry – input names, gifts, and other fields offline in a spreadsheet and then import them into your eTapestry database.

(Link to Import Module Datasheet here).

Common eTap Terminology to Know before Importing Data:

User Defined Field (UDF): Defined Fields are fields [Defined Field Overview](#) that your organization can create or edit in the database. These fields are customizable, and they can be set up to appear on every account screen, allowing you to track all of the data that is important to you in each area of an account. After data has been entered in these fields, you can use that data to group accounts together in queries, and then use those queries to run reports, allowing you to "segment" your data and see only the data that you want to see at any particular time. *User defined fields are completely controlled by the user. The user can create new udfs, place them on any account screen they want, and define how the field should look and what kind of data should be entered in it.*

System Defined Fields (SDF): System defined fields are only partially controlled by the user and are not completely customizable. They represent specific pieces of data that the application needs in order to function properly. Users cannot define where in the database system defined fields will be located, what the field is named*, the field's display type, or what kind of data can be entered in it. However, for most system defined fields, the user can customize what values are available in the field, and *for one type of field, Phone Types, the user can customize the names of the fields and add more of those fields to the screen.

Visit the System Defined Fields page for more information on the following system defined fields:

- Contact Method
- Country Codes
- Credit Card
- Data Source
- Log Entry Type
- Persona Types

- Phone Type Code
- Real Estate
- Security Rights
- Approaches
- Campaigns
- Funds
- Letters
- Relationship Types
- Sticky Note Types

Fund: Funds designate what the purpose of the donation is. Fund is always a required field when you enter a gift. Many organizations create a general fund where unrestricted donations are recorded, and several other funds with specific designations, such as a fund for each event and funds for different projects that you undertake. Fund is always a required field when you enter a gift.

Campaign: Campaigns are the overall goal of a fundraising project. They have a defined start and end date, and usually have a monetary goal. Typical campaigns include annual campaigns and capital campaigns. Most organizations do not have many campaigns, and not all gifts have to be tied to a campaign.

The Campaign field is not required when you add a gift, although your organization can choose to make it required.

Approach: Approaches are the means you use to raise money for your organization. They normally track the sources your organization uses to generate gifts and the expenses associated with these sources. They can include any activity, like a direct mailing, a phonathon, or a dinner party. Keeping track of approaches can help you analyze how different types of asks perform with your constituents.

The Approach field is not required when you add a gift, although your organization can choose to make it required. When you know what specific approach generated a gift, we recommend that you track it when you enter that gift.

Is Your File Formatted Correctly?

Before attempting any import in your database, be sure you have formatted your file correctly. Included within this document titled “Name in eTapestry Documentation”. This information will help you better understand formatting your files for the import. Also, a sample Excel file template is included for you as a starting point for your import file. You can also find more information using the internal help tool. Log

into your eTap database, click on Help, Help again and type in the search option Import Setup – Advance Options.

If you have used the import tool before and just need a refresher this video is a great resource. If you are new to importing please watch the following video for an overview of the Import module. You will need to be logged into your eTapestry database to access the video https://mqj.etapestry.com/mqj/viewTrainingVideo.do?video=https://www.blackbaudhq.com/files/etapestry/media/uploads/PP_AccountinfoPart1.swf&width=800&height=600 (this video needs to be updated, but provides a good overview of the process)

Once you commit your import file, you cannot reverse it! Please review the below documentation and resources. If this is your first time importing data we suggest only importing a few accounts as a test run. Once you feel comfortable with the import you want to run, then commit to bring in the complete file.

Formatting Your Import File

While eTapestry allows you to import various combinations of data from files produced by outside sources, there are some guidelines that must be observed in order for your file to import correctly. Please note the following when preparing your import files:

The file must be saved as a text (.txt) or comma delimited (.csv) file.

If your file is saved as a different file type, such as .xls, please resave it as either a text or comma delimited file prior to attempting your import. Click the "show details" link for information on using Excel to save an .xls file as a text or comma delimited file.

The file must be 1,000 lines or less.

eTapestry allows you to create/update up to 1,000 records at a time. If your file contains greater than 1,000 lines, the import mechanism will not accept it. Please break up files with greater than 1,000 lines into multiple files to import separately.

The file must have column headers.

When mapping your import file's data into eTapestry, you'll need a heading for each column so that you can appropriately map it into the correct eTapestry field. The first line of your import file should contain only the column headers for these mapping purposes; it should not contain any of the data that you actually want to import into fields in the database. That data should begin on line 2 in your file.

The file should not contain any blank lines.

Including blank lines in the body of your import file will lead to errors during the import process. Please remove those blank lines prior to attempting your import.

You may encounter difficulty with your import if the file being imported contains any line breaks within the fields or any fields that contain quotes.

The file must contain the required data for the import type.

The required data in your file will vary depending on the type of import you are running. The articles on each specific import type contain details regarding what specific columns of data are required for each import.

The names of the columns containing the required data do not need to be the same as the name of the eTapestry field that will accept that data; you merely need to include a column containing the data so that you can map that column into the required eTapestry field. For an example of a situation where you do not need to include required data in your import file, click the "show details" link.

Any time the data in a particular column will be the same for every single line in your import file, you can type that data in during the mapping of the import, rather than mapping in a column from your import file. For example, if you are importing account address data for Personal addresses only, you can type in the word Personal when mapping the Persona Type information, rather than mapping in a column called "Persona Type" that was set up in your import file.

Persona Type Mapped

Key ?	eTapestry Field	Import Data	Sample: 1
<input type="checkbox"/>	Persona Type	[Type]	Business
<input checked="" type="checkbox"/>	Account Name	[Name]	John Smith
<input type="checkbox"/>	Sort Name	[Sort Name]	Smith, John

Persona Type Typed in as Personal

Key ?	eTapestry Field	Import Data	Sample: 1
<input type="checkbox"/>	Persona Type	Personal	Personal
<input checked="" type="checkbox"/>	Account Name	[Name]	John Smith
<input type="checkbox"/>	Sort Name	[Sort Name]	Smith, John

Some other fields that you might be importing where the data could potentially be the same for every account include Date (on gifts, journal notes, or journal contacts), Fund (on gifts), or Contact Method (on journal contacts). However, if the data for a field varies on any of the records in your import file, then you should include the data as a column in your file rather than typing it directly into the mapping field.

Any system or user defined field values that will be imported into fields with set value choices (i.e. dropdown menus or checkboxes) need to match the existing defined field values in your database.

For example, if you're importing gifts, the Funds listed for each gift in your import file must match up to an existing Fund in your database. Another example is if you're importing account data, the Type (persona type) listed for each account must match up to an existing Persona Type in your database.

The same is true for any user defined field values that you are importing into dropdown or checkbox fields. *If they are misspelled or include any extra spaces, you will encounter errors during the import process, and **you will not be able to complete the import.***

User defined values that will be imported into a multi-select field must be properly delimited in your import file.

Multi-select fields are those fields in your database that are set up to allow users to enter data by checking boxes next to pre-defined values, as in the image below:



Favorite eTap Events:

Dodgeball Family Feud Watermelon Seed Spitting

Pi Day Golf Tournament Bowling

Whiffle Ball


If you are importing data into a multi-select field and you wish to import multiple values into that field for a single record, those values should be listed in the same column in your import file and should be delimited using one of the following characters:

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

Here's an example of some multi-select values in an import file, delimited by an asterisk:

E
Favorite eTap Events
Dodgeball*Pi Day*Bowling
Soccer
Whiffle Ball

If the highlighted record was imported, it would update the user defined field like this:



Favorite eTap Events:

Dodgeball Family Feud Watermelon Seed Spitting

Pi Day Golf Tournament Bowling

Whiffle Ball

The Import Process

When you have your import data file set up according to the guidelines above and you are ready to begin setting up your import template, you can access the Import feature by going the Mass Update tab and clicking **Import**.

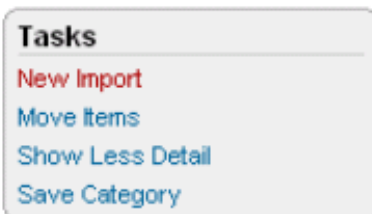
Screen shot of how to get to the import tool



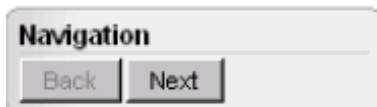
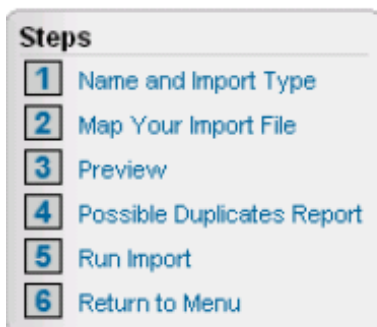
This will bring you to the Import Categories screen, where you choose the category under which you'd like to store your import template. eTapestry automatically creates one import category called Standard eTapestry

Imports. You can store import templates there, and you can also create new categories to store and organize your import templates. Please visit our **Database Organization** page for details on setting up and using Categories in eTapestry.

Once inside the category where you'd like to store your import template, click Add New Import to begin creating a new import template (if you have previously created an import template that you want to use again, just click on the name of that template to open it up).



This will open up the Import Wizard, which walks you through the six steps.



Let's review the steps together:

Step 1. Name and Import Type

In this step, you must enter a **Name** for your template. We recommend making the template Name as descriptive as possible. You can also enter further details regarding the template in the Description field if you wish.

In the **Select the Type of Information to Import** menu, choose the import type that you are planning to run with this template. Please see the **Mass Update Category** for more information on different import

types. **Please note that after the import template has been saved, you will not be able to adjust the import type.**

In the **Select File to Import** section, click the Browse button to locate and upload your import file from your computer. You will need to select your new import file each time that you run an import.

In the **Multi-Select Delimiter** section, choose which particular delimiter you elected to use for separating multi-select field values in your import file. If your file does not contain any multi-select fields, you can leave this set at the default setting.

The screenshot shows the 'Advanced Import' interface. On the left, a 'Steps' sidebar lists: 1 Name and Import Type (highlighted), 2 Map Your Import File, 3 Preview, 4 Possible Duplicates Report, 5 Run Import, and 6 Return to Menu. Below the sidebar is a 'Navigation' section with 'Back' and 'Next' buttons. The main form area is titled 'Advanced Import' and contains several sections: 'Name' with a text input field and a 'Description' text area; 'Select the Type of Information to Import' with a dropdown menu set to 'Account Information'; 'Select the File to Import' with a file input field and a 'Browse...' button; and 'Multi Select Delimiter' with a dropdown menu set to '*'. To the right of the delimiter dropdown is a 'Sample Import File (For Demonstration Only)' section containing the text: 'Name, Favorite Pies', '"John Doe", "Apple*Cherry*Pumpkin"', and '"Jane Smith", "Pumpkin"'. Below this sample is a paragraph explaining that the delimiter is used to separate values in a multi-select field.

Step 2. Mapping Your Import File

In this step, you will map the columns in your import file into the appropriate fields in your eTapestry database. This tells the import mechanism which data should end up where in your database. You will also choose your Duplicate Key, which tells the import mechanism what data to use when checking for existing accounts in your database.

The screenshot shows the 'Advanced Import' interface at Step 2: Map Your Import File. The 'Steps' sidebar highlights step 2. The main form area is titled 'Advanced Import' and features a table for mapping columns. The table has four columns: 'Key', 'eTapestry Field', 'Import Data', and 'Sample: 1 2 3 4 5'. There are three rows in the table: 'Persona Type', 'Account Name', and 'Sort Name'. Each row has a checkbox in the 'Key' column and a text input field in the 'Import Data' column. To the right of each input field is a green circular icon with a plus sign. Below the table is a blue arrow icon pointing to the right, followed by the text 'Import Another eTapestry Field'. The 'Navigation' section at the bottom left contains 'Back' and 'Next' buttons.

Mapping Your Import File

First, you will see that there are fields that eTapestry has included that must have data mapped to them from your import file. The list of required fields varies depending on which import type you chose for the template; please see the **Mass Update Category** for more information on the different import types and which fields are required in each one. The required fields will show up at the top of the list of eTapestry Fields when you navigate to Step 2. These required fields will not display a red X next to them allowing you to remove them from the template.

Key	eTapestry Field	Import Data	Sample: 1 2 3 4 5
<input type="checkbox"/>	Persona Type	<input type="text"/>	
<input type="checkbox"/>	Account Name	<input type="text"/>	
<input type="checkbox"/>	Sort Name	<input type="text"/>	

[Import Another eTapestry Field](#)

You have the option of adding additional eTapestry Fields by clicking the *Import Another eTapestry Field* link. This opens a small window where you can browse through the list of eTapestry Fields into which data can be imported. This list of fields will vary based on which Import Type was chosen in Step 1; please see the **Mass Update Category** for more information on the different import types. Once you locate a field that you'd like to add to your import template, simply click on it to add it to the import template.

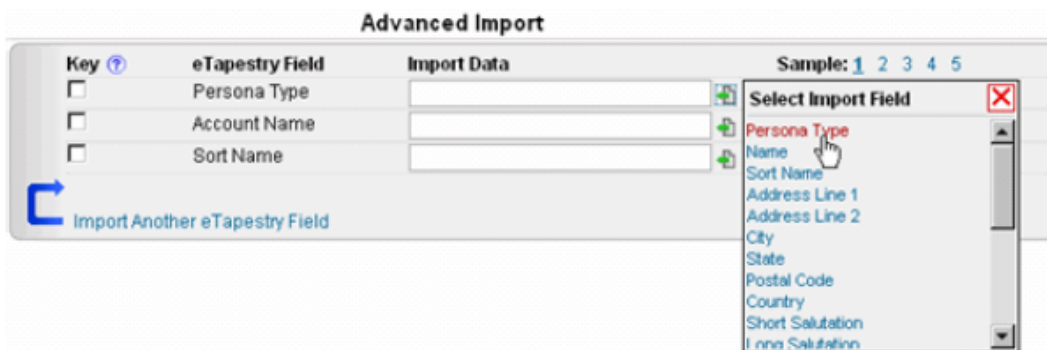
Key	eTapestry Field	Import Data
<input type="checkbox"/>	Persona Type	<input type="text"/>
<input type="checkbox"/>	Account Name	<input type="text"/>
<input type="checkbox"/>	Sort Name	<input type="text"/>

[Import Another eTapestry Field](#)

Select eTapestry Field
 Search
Account Fields
Account Number
Recognition Name
Recognition Type
Address
City
State
Postal Code
Country
Country
Salutation

To map data from a column in your import file into an eTapestry Field, click the icon next to the field where the data should go. This opens a small window where you can browse through all of the columns

that you included in your import file. Select the correct column from the list, and then close the window by clicking the **red X**.



Selecting a Duplicate Key

When you've finished selecting your eTapestry fields and mapping your import data into them, it's time to select your Key. The Key is what tells the import mechanism what fields to match on when it searches through your existing accounts to locate potential duplicates. This is a very important part of setting up your import template - if you do not select a good Key, then you may end up inadvertently importing duplicate accounts.

Some good Key options include the following:

- **Account Number** - if your import file includes the eTapestry account number data, you can use the Account Number as your duplicate key to match up data that is being imported for existing accounts.
- **A unique user defined field** - if your organization uses a different field in which you track unique account numbers (for example, a Student ID number), you can use that to check for duplicates.
- **Account Name and Address** - if you select both Account Name and Address, then both items must match the data listed on the existing account in order for it to come up as a possible duplicate. If only one matches, then the account will not come up as a duplicate.

This is true for any duplicate keys that you choose - the data must match in *all chosen keys* in order for an account to come up as a possible duplicate.

Important to know ***For situations where you want to update Address field data on existing accounts, you should not use Address as a Key because it could lead to creating duplicate accounts due to the address in the database differing from the address in your import file.

To choose your duplicate checking Key(s), simply check the box next to the item(s) you wish to check on in the Key column.

*****For the exception to the "match all" rule established above, please see the article on Persona Selection in the Possible Duplicates Report, which discusses how duplicate checking works when Persona Type is chosen as a Key.** You can access this by logging into eTap, click help and search on [Possible Duplicate Report](#).

Key ?	eTapestry Field
<input type="checkbox"/>	Persona Type
<input checked="" type="checkbox"/>	Account Name
<input type="checkbox"/>	Sort Name
<input checked="" type="checkbox"/>	✘ Address
<input type="checkbox"/>	✘ City

Checking the Sample

Before leaving the Mapping step, it's always a good idea to check the Sample data listed to the right of the mapping fields. The Sample shows you how the first five lines of data in your import file will look in the eTapestry fields, based on your current mapping. This is the first step in verifying that you've mapped your data correctly. Click on the number links at the top to switch the data displayed from one line to the next.

Sample: 1 2 3 4 5
Business
Melissa Jordan
Jordan, Melissa
6107 W. Airport Blvd. Suite 120
Greenfield
IN
46140
US
Melissa
Miss Jordan
888-739-3827 x. 7293
melissa.jordan@etapestry.com
Miss Melissa K. Jordan
eTapestry
Business Analyst
Individual

Here's an example of an import template that has been completely mapped. All selected eTapestry fields have been mapped to columns in the import file, a duplicate key has been chosen, and the sample data indicates that all data has been correctly mapped into the appropriate fields.

Advanced Import

Steps

- 1 Name and Import Type
- 2 Map Your Import File
- 3 Preview
- 4 Possible Duplicates Report
- 5 Run Import
- 6 Return to Menu

Navigation

Back Next

Key	eTapestry Field	Import Data	Sample: 1 2 3 4 5
<input type="checkbox"/>	Persona Type	[Persona Type]	Business
<input checked="" type="checkbox"/>	Account Name	[Name]	Melissa Jordan
<input type="checkbox"/>	Sort Name	[Sort Name]	Jordan, Melissa
<input type="checkbox"/>	Address	[Address Line 1]\r\n[Address Line 2]	6107 W. Airport Blvd. Suite 120
<input type="checkbox"/>	City	[City]	Greenfield
<input type="checkbox"/>	State	[State]	IN
<input type="checkbox"/>	Postal Code	[Postal Code]	46140
<input type="checkbox"/>	Country	[Country]	US
<input type="checkbox"/>	Short Salutation	[Short Salutation]	Melissa
<input type="checkbox"/>	Long Salutation	[Long Salutation]	Miss Jordan
<input type="checkbox"/>	Voice	[Voice]	888-739-3827 x. 7293
<input type="checkbox"/>	Email	[Email]	melissa.jordan@etapestry.com
<input type="checkbox"/>	Envelope Salutation	[Envelope Salutation]	Miss Melissa K. Jordan
<input type="checkbox"/>	Company	[Company]	eTapestry
<input type="checkbox"/>	Job Title	[Job Title]	Business Analyst
<input type="checkbox"/>	Account Type	[Account Type]	Individual

Import Another eTapestry Field

When you've completed all of these steps on the Mapping screen, click the **Next** button, or click on Step 3. Preview to proceed.

Step 3. Preview

Advanced Import

Steps

- 1 Name and Import Type
- 2 Map Your Import File
- 3 Preview
- 4 Possible Duplicates Report
- 5 Run Import
- 6 Return to Menu

Navigation

Back Next

Persona Type: Business Account Name: Melissa Jordan Sort Name: Jordan, Melissa Address: 6107 W. Airport Blvd. Suite 120 City: Greenfield State: IN Postal Code: 46140 Country: US	Short Salutation: Melissa Long Salutation: Miss Jordan Voice: 888-739-3827 x. 7293 Email: melissa.jordan@etapestry.com Envelope Salutation: Miss Melissa K. Jordan Company: eTapestry Job Title: Business Analyst Account Type: Individual
Persona Type: Personal Account Name: Magdalena Watson Sort Name: Watson, Magdalena Address: 3892 Ogamoga Ln. City: Indianapolis State: IN Postal Code: 46225 Country: US	Short Salutation: Magda Long Salutation: Ms. Watson Voice: 317-485-6029 Email: Envelope Salutation: Ms. Magdalena H. Watson Company: Job Title: Account Type: Individual
Persona Type: Business Account Name: Blondie's Café Sort Name: Blondie's Café Address: 501 W. Washington St. City: Indianapolis State: IN Postal Code: 46110 Country: US	Short Salutation: Nina Cooper Long Salutation: Nina Cooper Voice: 371-351-4480 Email: blondiesonwashington@yahoo.com Envelope Salutation: Ms. Nina Cooper Company: Blondie's Job Title: Manager Account Type: B

The Preview step is the second opportunity to verify that you have mapped your data correctly. In this step, you can view all of the selected eTapestry fields and the exact data that will be mapped into each field for the first twenty-five lines in your import file. We strongly recommend that you carefully check over this preview to verify that your mapping is correct. If you notice any mapping errors, you can click

the **Back** button, or click on Step 2. Map Your Import File, to go back to the mapping screen and make adjustments. **If you need to make adjustments to the data in your file, you will need to go back to Step 1.** Name and Import Type to re-upload the corrected file after you've saved your corrections to it.

When you've finished checking the preview, click the Next button, or click Step 4. Possible Duplicates Report to proceed.

Step 4. Possible Duplicates Report

The Possible Duplicates Report is the stage in the import process where the import mechanism allows you to choose how to handle any records in your file that match up to existing accounts in your database. The duplicates found are based on the duplicate Key(s) that you chose on Step 2. You have five actions available for each potential duplicate:

Merge

This will merge data from your import file into any fields that **do not already contain data on the existing account.** **No new account will be created, and fields that already contain data on the existing account will not be affected.**

Replace

This will move all of the data from your import file into the fields that you've mapped it on the existing account, regardless of whether or not those fields already contain data. No new account will be created.

Please note that for any fields in your import file that are empty, eTapestry will not erase existing data on the account.

Create

This will create a new account using the data in your import file. **The existing account will not be changed.**

ADD VISUAL AID OR SCREEN SHOT to show how this works in the database.

Skip

This will skip that line in your import file. **No new account will be created, and no existing account will be changed.**

Trust

This pertains **only** to imports where you are importing Journal Entry information. Choosing **Trust will cause the Journal Entry information alone to be added to the existing account.** **No new account will be created, and the existing persona and account-level data will not be changed.**

If you choose Trust on an import where you are not importing Journal Entry information (for example, the Account Information import), then it functions like Skip - that line in your file is completely skipped. No new account is created, nor is the existing account changed.

If you have questions about what actions you should choose, do not commit your import! Request assistance from our Support team in choosing the appropriate action. Once you commit your import file, you cannot reverse it. Be

sure that all options are correct and that you are ready to perform the import before you click **NEXT** on this screen.

Pre-Import Errors

If there are any problems with your import file that will not allow the import to successfully complete, then instead of seeing the Possible Duplicates Report in Step 4. , you will see a screen listing the errors found in your file

Advanced Import

Your import cannot be completed. You must correct your import file and reattempt the import.

Line Number	Field	Error
2	Type	Field must be a valid Persona Type
3	Type	Field must be a valid Persona Type
4	Type	Field must be a valid Persona Type
5	Type	Field must be a valid Persona Type

If your import file contains errors you will need to correct them in your file, save the file, and then navigate back to Step 1. Name and Import Type to upload the corrected file.

Step 5. Run Import

When you've finished setting the actions on the Possible Duplicates Report, click the **Next** button or Run Import to run your import.

Once you have begun the import, you will not be able to stop it. Please be certain that you have your data correctly mapped and the correct actions chosen on the Possible Duplicates Report prior to beginning the import.

After the import has finished, a second Import Statistics Report will display to show the number of accounts created, accounts modified, duplicate accounts skipped, and journal entries created (this only applies to imports where journal entries can be created).

Advanced Import

Import Statistics Report

Accounts Created: 2
Accounts Modified: 3
Duplicate Accounts Skipped: 0
Journal Entries Created: 0

Step 6. Return to Menu

Clicking this step after the import has finished will return you to the import category. You have completed the Import Process and should now be able to import data into your eTap database!

Additional Resources to Assist You!

We have several videos that provide overviews of different import types you can watch. Please log into your eTap database click on the Help tab, Recorded Training, Scroll through the video list until you reach the section labeled ***Importing Accounts***.

Account Info Part 2 – provides an overview of running the import.

The following videos provided an overview of the various type of Import

- Account Information with Single Gift
- Account Information with Single Note
- Account Information with Single Contact
- Single Gift by Account Number
- Single Note by Account Number
- Single Contact by Account Number

Good luck as you begin using the import module. Remember to reach out to our support team as you have technical questions.

Name Formatting Documentation

Here are the basic naming conventions for Individual Accounts versus Business/Organization/Foundation Accounts. Each Bold and Underlined Example should be on its own worksheet in the Excel Workbook due to the different columns used in the mapping of names for each specific type of account.

Note: Before the equal sign (=) is the **Field in eTapestry**, while Columns in your spreadsheet are represented by Brackets [].

- **Individual Accounts**
 - **Account Name** = [First Name] [Middle Initial] [Last Name] [Suffix]
 - **Sort Name** = [Last Name], [First Name] [Middle Initial] [Suffix]
 - **Short Salutation** = [First Name]
 - **Long Salutation** = [Prefix] [Last Name]
 - **Envelope Salutation** = [Prefix] [First Name] [Middle Initial] [Last Name] [Suffix] [Prof Cert]

Please note:

*Suffixes [Suffix] that differentiate a person like: II, Jr., Sr., III, and IV, etc. should be used in the Account Name, Sort Name and Envelope Salutation Fields only.

**Suffixes that are professional certifications or academic accomplishments [Prof Cert]: Esq., JD, PhD., MSN, or CPA, etc. should only be included in the Envelope Salutation Field.

*** Prefixes/Titles like: Mr., Ms., Dr., Miss, and Mrs., The Honorable etc. should only be included in the Long and Envelope Salutation Fields.

Consider: eTapestry was designed to track one individual on one account, but we understand you may not use it that way. Just be aware of the difficulties you can encounter by tracking a couple on one account.

- **Two Individuals with Same Last Name on One Account**

- **Account Name** = [First Name1] [Middle Initial1] & [First Name2] [Middle Initial2] [Last Name]
- **Sort Name** = [Last Name], [First Name1] [Middle Initial1] & [First Name2] [Middle Initial2]
- **Short Salutation** = [First Name1] & [First Name2]
- **Long Salutation** = [Prefix] [Last Name]
- **Envelope Salutation** = [Prefix] [First Name1] [Middle Initial1] [Last Name] [Suffix] [Prof Cert]

Please note:

* You may want to ensure you type the man's name into [First Name1] so the **Envelope Salutation** is formatted consistently based on traditional uses. ***If your organization has different preferences, consistency across every Account is critical, not how you address your constituents.***

** You may want to add two individuals to the Joint Persona Type, leaving the Personal Persona Type to address the primary contact as an individual. This is good for Board Members and their spouses.

- **Two Individuals with Different Last Names on One Account**

- **Account Name** = [First Name1] [Middle Initial1] [Last Name1] [Suffix1] & [First Name2] [Middle Initial2] [Last Name2] [Suffix2]
- **Sort Name** = [Last Name1], [First Name1] [Middle Initial1], [Suffix1] & [First Name2] [Middle Initial2] [Last Name2] [Suffix2]
- **Short Salutation** = [First Name1] & [First Name2]
- **Long Salutation** = [Prefix1] [Last Name1] & [Prefix2] [Last Name2]
- **Envelope Salutation** = [Prefix1] [First Name1] [Middle Initial1] [Last Name1] [Suffix1] [ProfCert1] & [Prefix2] [First Name2] [Middle Initial2] [Last Name2] [Suffix2] [ProfCert2]

Please note: You may want to add two individuals to the Joint Persona Type, leaving the Personal Persona Type to address the primary contact on the account as an individual.

- **Business/Organization/Foundation (Non-Individual) Accounts**

- **Account Name** = [Company/Org Name]
- **Sort Name** = [Company/Org Name]

- Note: You might want to make a Sort Name Column in your spreadsheet for these types of accounts to remove articles like “A” or “The” so the name of the Company/Org will sort correctly.
 - Example: “The First Bank of Kentucky” is the Bank Name but the Sort Name should be “First Bank of Kentucky” and the only way to ensure that is sorted alphabetically is to remove “The” from the Sort Name Field.
 - **Short Salutation** = [First Name]
 - **Long Salutation** = [Prefix] [Last Name]
 - **Envelope Salutation** = [Prefix] [First Name] [Middle Initial] [Last Name] [Suffix] [Prof Suffix]

SPECIAL NOTES:

- These types of Accounts should have a Column for “Account Type” and then designate if it is one of the following Account Types:
 - Business = For Profit companies
 - Organization = Nonprofit organizations
 - Foundation = Grant or funding organizations
 - Religious = Faith-based churches, temples, synagogues, etc.
- **What if you have two or more people that you contact at one company/organization?**
 - Some organizations make a data entry rule that only the CEO or Executive Director is named on the Company/Organization’s Account, while others make a rule that the primary contact is the one on the Company/Organization’s Account.
 - Whoever is listed in the Salutation Fields on the Organization’s Persona Page. Any additional contacts would need to be added to the database as an Individual Account(s) and then linked to the Company/Organization’s Account using the Relationship Type functionality.