

Common Errors for Importing

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 columns containing whatever required data is needed to process the import.

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