

Data Import & Review

Last Modified on 09/10/2024 3:25 pm EDT

Review manually imported data, automated data flowing to GiveSmart Donor CRM from Events & Fundraise and manage your duplicate contacts from the Data Import & Review tab found in the left navigation.

Video Timestamps:

- 0:14 Download Templates
- 0:37 Import Templates
- 1:31 Review Import
- 2:28 Review Potential Duplicate Contacts
- 3:50 Review Potential Duplicate Transactions
- 4:27 Check Name Changes from Automated Imports
- 5:09 Manually Search for Duplicate Contacts

Important: All accounts will default to the recommended manual data review and the email will be sent to all Admin. To modify the setting or to adjust the recipient, visit [Client Settings](#) to learn how.

GENERAL SETTINGS CUSTOM FIELDS 3RD PARTY INTEGRATIONS **DATA SETTINGS**

Incoming Data - Review Settings

By default, your imported data will wait in a "holding table" for your review before being brought fully into the system. This includes data coming in through Automated Data Sync as well as any manual imports. You can [review your imports here](#).

We strongly recommend this manual review. If you wish, however, you may change your settings to import automatically, without review. **Please note: Bypassing manual review could result in data with errors or omissions.**

Review manually (RECOMMENDED): I wish to manually review my data as the final step of the import.

Import without review: I understand the implications. I wish to bypass manual review and automatically import my data into the system.

Who should receive email notifications (status and error messages) about imports?

All Admins ▼

CANCEL SAVE

Review Data

To review your imported data, from the left navigation select **Data Import & Review**. Choose Import Review.

Here you can review all Contact & Transaction imported data that is awaiting review.

Confirm your data

Import Review

Finalize your import and make sure your data is coming in the way you want it to.

NOTE: If there are Contacts available for review, those will need to be reviewed/actioned prior to reviewing Transactions.

Data Review - Incoming Transactions

CONTACTS (0) **TRANSACTIONS (881)**

Gift Date from to Filters

CLEAR ALL

Total Records for Review: 881 Filtered Count: 881 Total selected for Import: 881

Import	Don't Import	Imported Date	External Donor ID	Last Name	First Name	External System	External Transaction ID	Gift Date
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	GSE_1	One	User			10 May, 2024
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	GSE_1	One	User	GS Fundraise	GSF_p2	10 May, 2024
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	19			CSV		21 Jan, 2019
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	14			CSV		28 May, 2021
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	25	Cherry Holme	Michaela	CSV		15 Aug, 2021
<input checked="" type="radio"/>	<input type="radio"/>	10 May, 2024	18			CSV		28 Feb, 2020

Navigation: << < 1 2 3 4 ... 18 > >>

To review the data, apply a data range, insert a filter or sort by column. All fields contacts and transactions will default to 'Import'. Select the Don't Import checkbox or select the 'All on Page' button at the top of the column to quickly select all visible fields on this page.

Once your review is complete, click **Confirm Import**.

Selecting the 'All On Page' button at the top of the Don't Import or Import columns will ONLY select all available line items on this page. Each page displays 50 line items. To select more, navigate to the next page and repeat for any contacts or transactions you wish to mark as Import or Don't Import.

IMPORTANT: By selecting 'Don't Import', these contacts and transactions will be removed from the data review file and will **NOT** be available for reviewing and modifying at a later date.

Synced Contact Updates

What does it mean when Contacts are highlighted yellow during the import review?

When a contact being uploaded/synced is recognized as an existing contact in Donor CRM, the row will be highlighted in yellow in import review indicating the contact will be updated (not duplicated).

This is letting you know that these contact profiles currently exist in Donor CRM, and may have new information associated with them.

If you upload an existing contact with no changes to any fields, it will not create a duplicate profile, and no changes will be made to the existing contact profile. If you upload an existing contact with changes to the contact information fields, the new information will be appended to the existing profile.

Import	Don't Import	Imported Date	External Donor ID	Last Name	First Name	Existing Last Name	Existing First Name
<input checked="" type="radio"/>	<input type="radio"/>	Sep 06, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 06, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 06, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 06, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 06, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 07, 2024	GSE_				
<input checked="" type="radio"/>	<input type="radio"/>	Sep 07, 2024	GSE_				

Important to Note: When a contact has been identified as an existing contact in your Import Review (highlighted yellow), additional fields will appear for *Existing First Name* & *Existing Last Name*. If you choose to import the highlighted contact, the First Name and Last Name noted in their respective columns **will override the existing name.**

Import Data

Manually import data to GiveSmart Donor CRM by choosing **Data Import & Review** from the left navigation.

Begin a new import by selecting a template to download. Choose between Contacts Template or Transactions Template, and select Download.

[Donor_CRM_Contacts_Template.xlsx](#) 

[Donor_CRM_Transactions_Template.xlsx](#) 

NOTE: The template is an Excel file (.xlsx). There are guided instructions at the top of the template that will assist you in filling out your template for proper upload. Do NOT delete Rows 1-3 of the template as they are necessary for ensuring your data is uploaded properly.

Import your data

Need a template?

Select the proper template for your data. Once the data is added, follow instructions below to import your data. If all your data is coming in through Automated Data Sync (ADS) or you already have a filled template, you can skip this step.

What kind of template do you want to download?

Select a Template

DOWNLOAD

Import your data

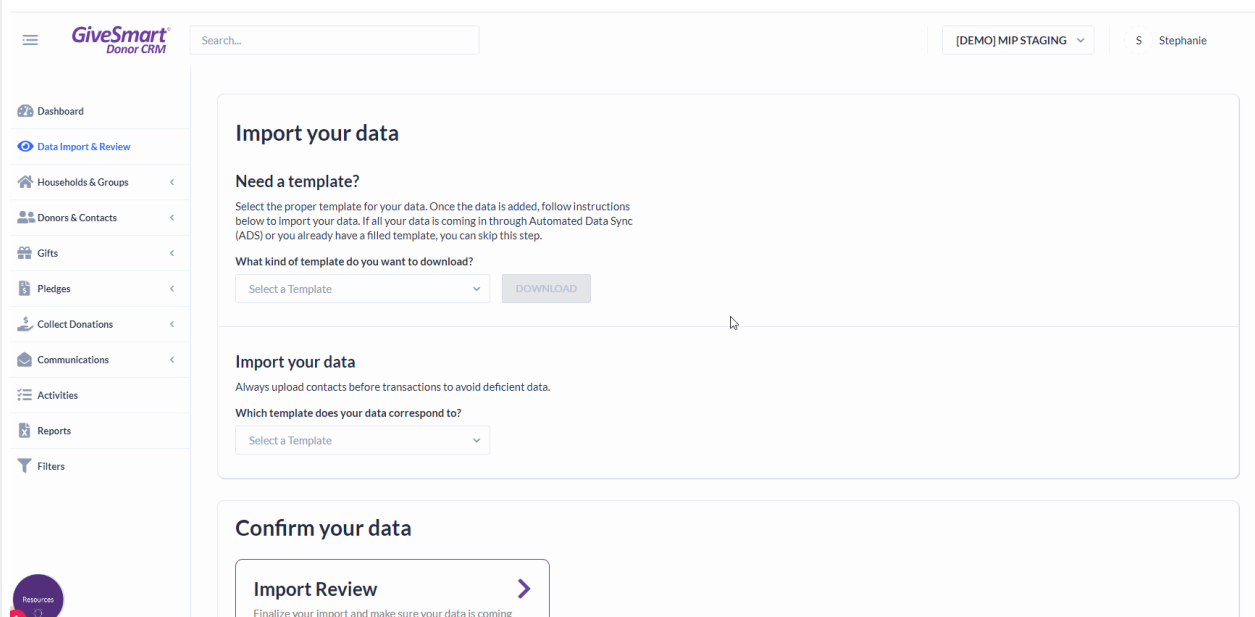
Always upload contacts before transactions to avoid deficient data.

Which template does your data correspond to?

Select a Template

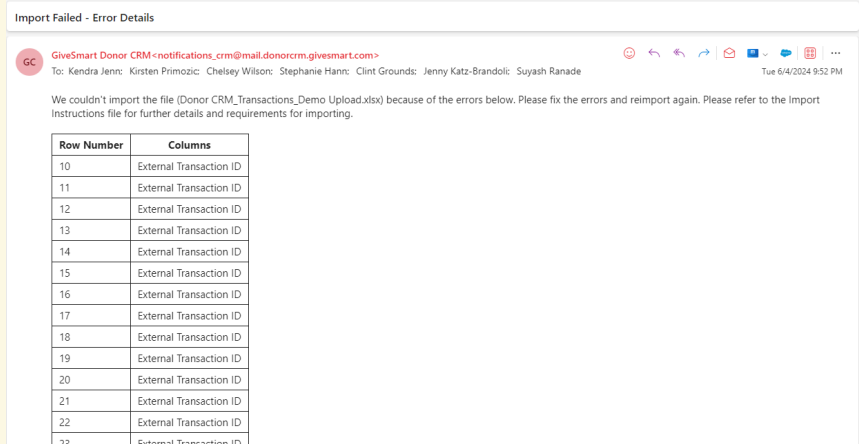
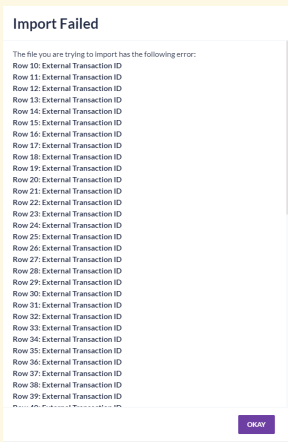
Once your template has been successfully populated with the data you wish to upload, save the file as an Excel file. Once saved, return to the Data Import & Review page and select which template you are uploading in the **Import Your Data** section.

Once the file is uploaded you will receive a popup notification with additional guidance and confirmation. If you have opted to review all data upon upload, you can do so by clicking the Review Import link in the popup and follow the steps in the **Review Data** section listed above.



The screenshot shows the GiveSmart Donor CRM interface. The top navigation bar includes the GiveSmart logo, a search bar, and user information: [DEMO] MIP STAGING and Stephanie. A left sidebar lists various menu items: Dashboard, Data Import & Review (highlighted), Households & Groups, Donors & Contacts, Gifts, Pledges, Collect Donations, Communications, Activities, Reports, and Filters. The main content area is titled 'Import your data' and contains the same form as described in the previous blocks. Below this form is a 'Confirm your data' section with an 'Import Review' button and a sub-section for finalizing the import.

Important to Note: Errors identified on the manual import will both be shown in a popup in platform and the admin attempting to upload the data will receive an email notification.



Merge Duplicates

Easily identify and merge duplicate contacts & transactions in Donor CRM with our merge options. Find out how to merge duplicates [here](#).