

# Data Import & Review

Last Modified on 11/05/2024 5:26 pm EST

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

If there is data available to be reviewed, a popup will also appear both after the data is imported and/or the next time an admin logs in. Clicking Review will take the admin to the data that needs to be reviewed. Once the Review button or the 'x' has been clicked, the popup will not appear again until there is new data for review.

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Otherwise, to review your imported data, select **Data Import & Review > Import Review** from the left navigation.

Here you can review all imported/synced Contact & Transaction data prior to committing that data into Donor CRM. 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 APPLY

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="checkbox"/>	<input type="checkbox"/>	10 May, 2024	GSE_1	One	User			10 May, 2024
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10 May, 2024	GSE_1	One	User	GS Fundraise	GSF_p2	10 May, 2024
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10 May, 2024	19			CSV		21 Jan, 2019
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10 May, 2024	14			CSV		28 May, 2021
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10 May, 2024	25	Cherry Holme	Michaela	CSV		15 Aug, 2021
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10 May, 2024	18			CSV		28 Feb, 2020

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

CONFIRM IMPORT

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.

**NOTE:** 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.

## Data Review - Incoming Transactions

CONTACTS (0) TRANSACTIONS (881)

Gift Date from

 Pick Date

to






 Pick Date

Filters

No Filter

Total Records for Review: 881

Filtered Count: 881

Import	Don't Import		Imported Date 	External Donor ID 	Last Name 	First Name 
<b>ALL ON PAGE</b>	ALL ON PAGE					
<input checked="" type="radio"/>	<input type="radio"/>		10 May, 2024	GSE_1	One	User
<input checked="" type="radio"/>	<input type="radio"/>		10 May, 2024	GSE_1	One	User

Once your review is complete, click **Confirm Import** at the bottom right.

**CONFIRM IMPORT**

The number of records selected to import/not import will be noted on the following dialogue window, at which point you can select Cancel to be taken back to the review screen, or select **Yes, Import Contacts** to confirm the import.

### Confirm your selections

 CANCEL

You have selected 2 contact records to import.

You have selected 0 contact records to not import.

Are you sure you want to proceed?

**YES, IMPORT CONTACTS**

**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](#)

**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

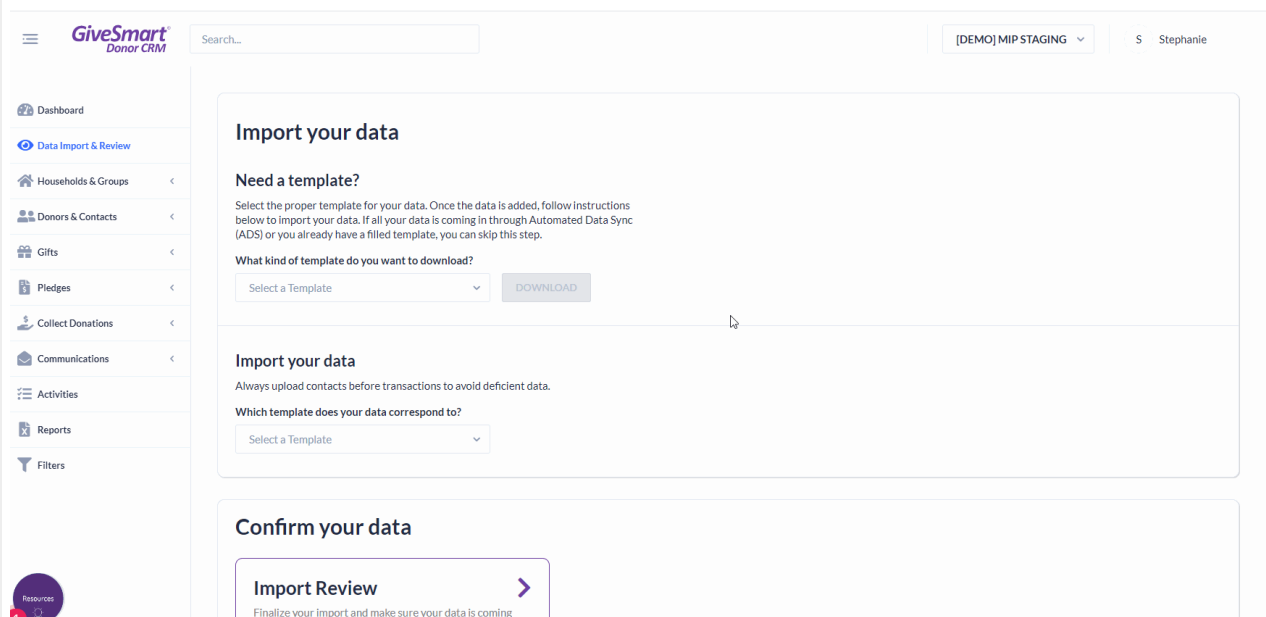
Always upload contacts before transactions to avoid deficient data.

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. At the top, there is a search bar and user information for 'Stephanie'. The left sidebar contains navigation links for 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 shown in the previous blocks. Below this, there is a 'Confirm your data' section with an 'Import Review' button and a sub-section for 'Finalize your import and make sure your data is coming'.

**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.

### Import Failed

The file you are trying to import has the following error:

Row 10: External Transaction ID  
Row 11: External Transaction ID  
Row 12: External Transaction ID  
Row 13: External Transaction ID  
Row 14: External Transaction ID  
Row 15: External Transaction ID  
Row 16: External Transaction ID  
Row 17: External Transaction ID  
Row 18: External Transaction ID  
Row 19: External Transaction ID  
Row 20: External Transaction ID  
Row 21: External Transaction ID  
Row 22: External Transaction ID  
Row 23: External Transaction ID  
Row 24: External Transaction ID  
Row 25: External Transaction ID  
Row 26: External Transaction ID  
Row 27: External Transaction ID  
Row 28: External Transaction ID  
Row 29: External Transaction ID  
Row 30: External Transaction ID  
Row 31: External Transaction ID  
Row 32: External Transaction ID  
Row 33: External Transaction ID  
Row 34: External Transaction ID  
Row 35: External Transaction ID  
Row 36: External Transaction ID  
Row 37: External Transaction ID  
Row 38: External Transaction ID  
Row 39: External Transaction ID

OKAY

### Import Failed - Error Details



GiveSmart Donor CRM <notifications\_crm@mail.donorcrm.givesmart.com>

To: Kendra Jenr; Kirsten Primozic; Chelsey Wilson; Stephanie Hann; Clint Grounds; Jenny Katz-Brandoli; Suyash Ranade

Tue 6/4/2024 9:52 PM

We couldn't import the file (Donor CRM\_Transactions\_Demo Upload.xlsx) because of the errors below. Please fix the errors and reimport again. Please refer to the Import Instructions file for further details and requirements for importing.

Row Number	Columns
10	External Transaction ID
11	External Transaction ID
12	External Transaction ID
13	External Transaction ID
14	External Transaction ID
15	External Transaction ID
16	External Transaction ID
17	External Transaction ID
18	External Transaction ID
19	External Transaction ID
20	External Transaction ID
21	External Transaction ID
22	External Transaction ID
23	External Transaction ID

## Merge Duplicates

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