Data Import & Review

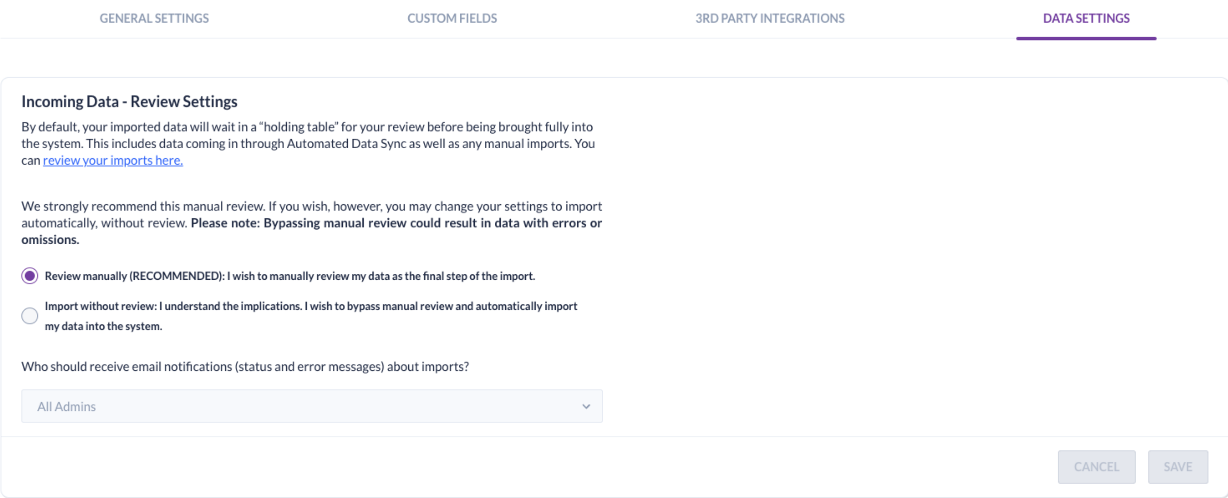
Last Modified on 09/10/2024 3:25 pm EDT

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

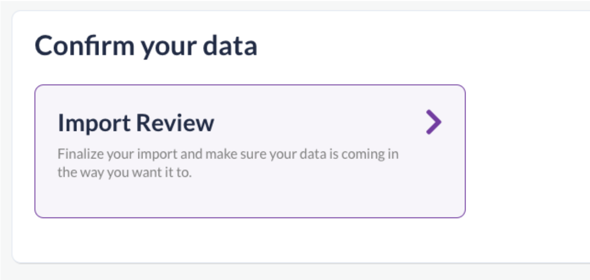
Important: All accounts will default to the recommended manual data review and the email will be sent to all Admin. To modify the setting or to adjust the recipient, visit Client Settings to learn how.



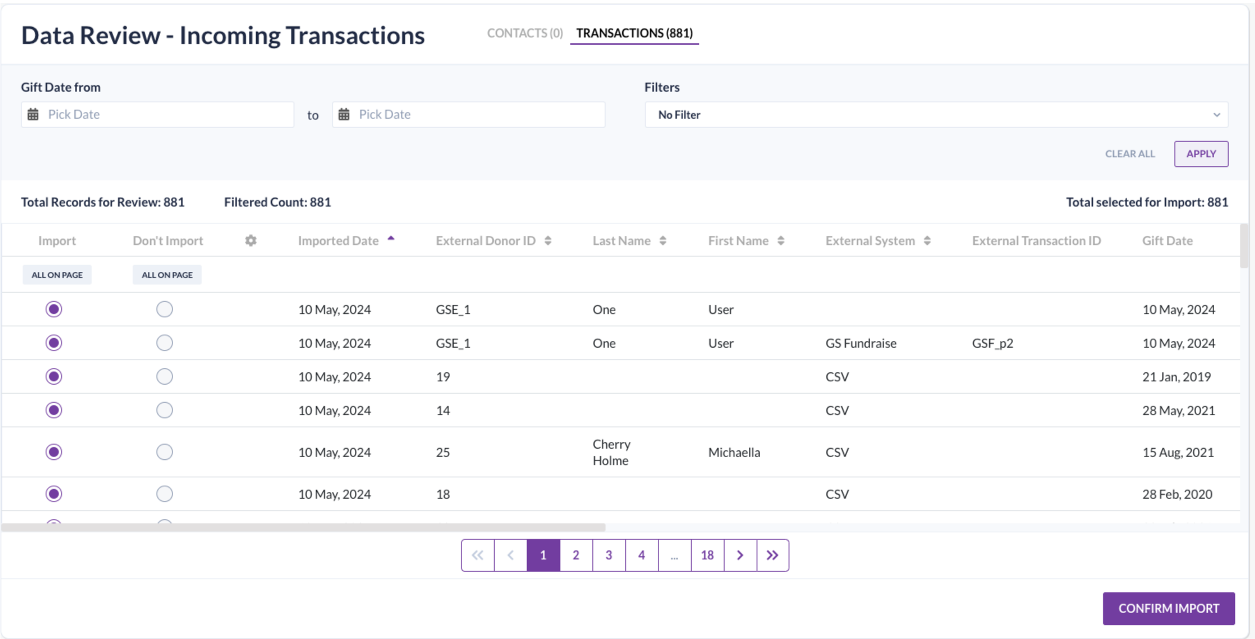
Review Data

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.



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



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
ALL ON PAGE	ALL ON PAGE							
			Sep 06, 2024	GSE_[redacted]			[redacted]	
			Sep 06, 2024	GSE_				
			Sep 06, 2024	GSE_				
			Sep 06, 2024	GSE_				
			Sep 06, 2024	GSE_			[redacted]	
			Sep 07, 2024	GSE_				
			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

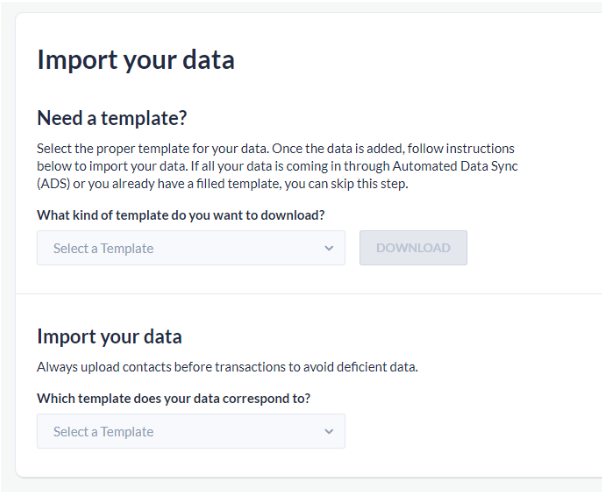
Manually import data to GiveSmart Donor CRM by choosing **Data Import & Review** from the left navigation.

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

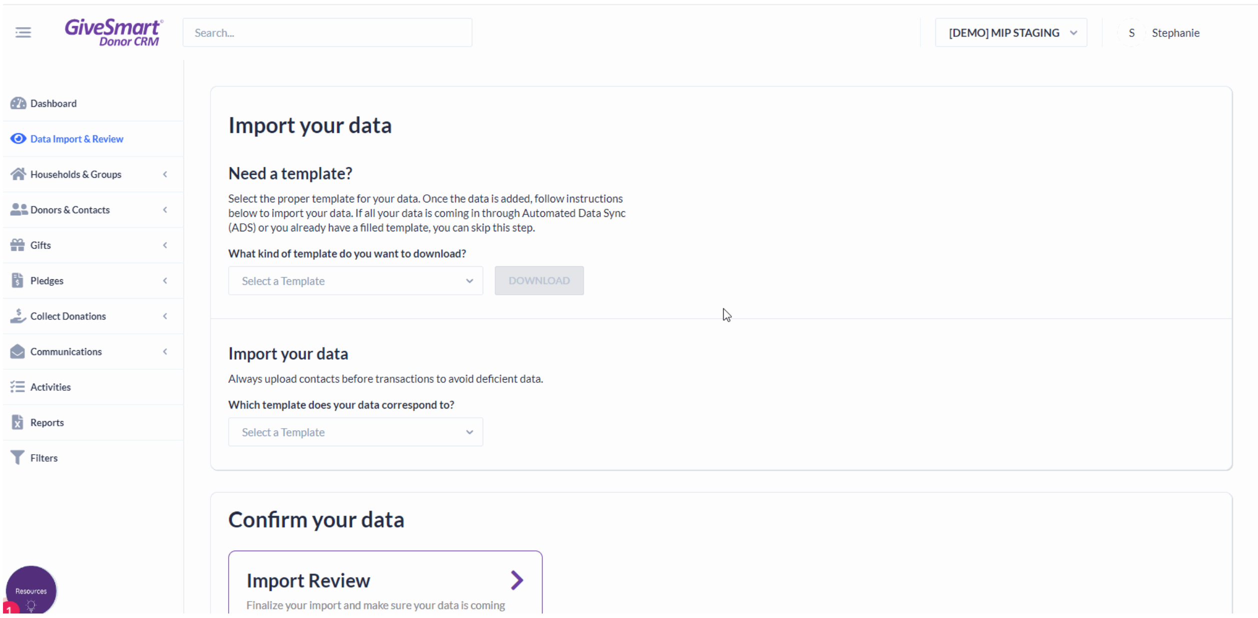
Donor_CRM_Transactions_Template.xlsx

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.

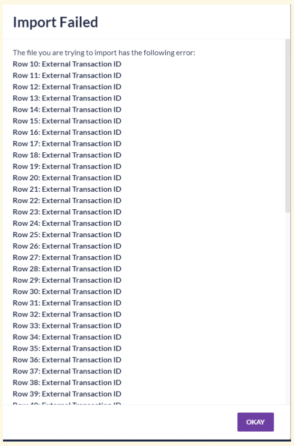


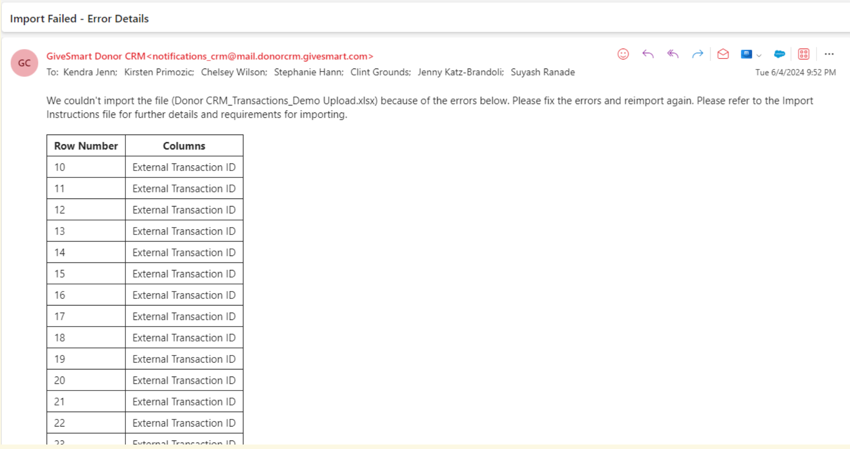
Once your template has been successfully populated with the data you wish to upload, save the file as an Excel file. Once saved, return to the Data Import & Review page and select which template you are uploading in the **Import Your Data** section.

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.



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 - Error Details

GC GiveSmart Donor CRM<notifications_crm@mail.donorcrm.givesmart.com>
To: Kendra Jenn; 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

Merge Duplicates

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