



## Importing data

The purpose of this guide is to walk you through all of the steps required to import data into CharityMaster. The system allows only the importation of “demographic” data – e.g. names, addresses, phone numbers, etc.

### ***Import file format***

CharityMaster can import data that is stored in the following formats:

- .csv – comma separated values – also called comma delimited format.
- .xls – Microsoft Excel 97 – Excel 2003 workbooks. If you have Excel 2007 or later, your data file probably would be saved in .xlsx format. CharityMaster cannot read this format but you can easily save your data in the .xls format. (Use **Save as ..** and select the .xls file format.)

Additional file formats may be supported in the future but generally your existing data can be easily transformed into one of these two formats.

The following rules apply:

- It is essential that the data be organized into rows with one row per name.
- For Excel workbooks, the data must be in the first worksheet of the workbook.
- Blank rows are not allowed.
- The first row in the file must be a header row which tells CharityMaster what data is stored in each column. The header row contains the CharityMaster field names – one field per column.
- The column header names must match *exactly* the names in the table below. *Check that your column headers do not contain any spaces!*
- The order of the columns does not matter.
- The number of columns you want to import does not matter: you need only have those columns that apply to your data. However the following four fields **MUST** be in your data file:
  - EntityCode
  - CompanyName (This column can be all blanks)
  - FirstName
  - LastName

The following table shows the field names / column headings available:

Field name (in header row)	Maximum length	Comments
EntityCode	2	Mandatory column. Must be a valid <b>number</b> . See the “Errors” section below.
LastName	25	Mandatory column. May be blank.
FirstName	25	Mandatory column. May be blank.
Nickname	25	This field is the salutation field. If this field is blank, CharityMaster will insert FirstName into this field.
CompanyName	40	Mandatory column. May be blank.
Position	50	May be blank. Applicable to organization records only. Examples: “Owner”, “President”
Address1	60	May be blank.
Address2	60	May be blank.
City	50	If there is no entry in this field, CharityMaster will automatically enter the city where your organization is located. <sup>1</sup>
State	50	May be blank. This is the state, province, territory or county. In the US and Canada, it is <i>strongly</i> recommended that you use the standard two character codes for states and provinces since this is the best format to fit in address labels, etc. <sup>2</sup>
Postal	15	May be blank.
Country	50	If there is no entry in this field, CharityMaster will automatically enter the country where your organization is located. <sup>3</sup>
HomePhone	20	Must not contain any spaces or special characters such as ‘(’ or ‘-’. May be blank. <sup>4</sup>

<sup>1</sup> The default city is set on the Organization tab of the System Setup screen.

<sup>2</sup> In the US and Canada, the valid state and province abbreviations (two capital letters) can be seen on the Province / State drop down. You can also find these abbreviations at [http://www.usps.com/ncsc/lookups/usps\\_abbreviations.html](http://www.usps.com/ncsc/lookups/usps_abbreviations.html) or <http://canadaonline.about.com/od/postalservices/a/abbreviations-provinces-canada.htm>

<sup>3</sup> The default country is set on the Organization tab of the System Setup screen.

<sup>4</sup> If there are any spaces or special characters in phone numbers, the search for phone number functionality will not work.

Field name (in header row)	Maximum length	Comments
BusPhone	20	Must not contain any spaces or special characters such as '(' or '-'. May be blank. <sup>5</sup>
BusExtension	5	May be blank.
eMailAddress	50	May be blank. Must be in a valid e-mail address format.
CellPhone	20	Must not contain any spaces or special characters such as '(' or '-'. May be blank. <sup>5</sup>
FaxPhone	20	May be blank.

## Logic Errors

The system checks for the following errors in the file that contains your data:

- Invalid field names. The field name must be exactly the same as in the table above.
- The entity code must be one of the valid entity type codes already defined in CharityMaster. See the **Maintain Entity Types** screen which is reached from the **File | Maintenance | General** menu. Unless you have entered a user defined entity type code, the only entity codes are:
  - o 1 - Individual
  - o 2 - Company
  - o 3 - Foundation / Agency
  - o 4 - Government
- If the entity code *does not equal* 1, the CompanyName (organization name) field cannot be blank. (If the entity code is 1, CharityMaster will ignore any entry in the CompanyName field.)
- If the first name is entered, the last name must also be entered.
- If the last name is entered, the first name must also be entered.
- The e-mail address format must be valid: i.e. it must contain the symbol @ and the last two or three characters must be preceded by a period.

If the system finds a *non-numeric* entry in the **EntityCode** field, it will display a message that it was “unable to append all of the data to the table.” Click **Yes** and the system will continue to process rows of data. CharityMaster will then tell you in which record the error occurred.

If any errors are detected, the import cannot proceed.

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<sup>5</sup> If there are any spaces or special characters in phone numbers, the search for phone number functionality will not work.

## Procedure

CharityMaster imports data in two steps. In the first step, you tell CharityMaster which file contains your data. Once you do this, CharityMaster will automatically try to convert your data into a form that can be read by CharityMaster. If no errors are found, then you can press the **Start merge** button. CharityMaster will then check for both logic errors and potential duplicate names. The following is a detailed guide:

1. Back up your data file. It is better to be safe and not import a bunch of data you don't want.
2. Ensure that the program that created your data file is closed. In other words, if the data file is open in Excel, the import cannot be started.
3. Start CharityMaster and start the **Import Wizard** by clicking on the **Import Wizard** button on the **Home** tab of the ribbon.
4. Select the type of file that has the data you are importing. (See above for the list of supported file types.)
5. Click on **Get file** and navigate to the folder where your data are stored. Click on the file name and then click on the **Open** button on the file browse dialog box.
6. If your data does not contain any errors, the screen will show the data from the mandatory fields and the **Start Merge** button will be enabled. If any errors are detected, a message will appear listing all of the errors. Proceed as follows:
  - a. Close the Import Wizard. (*Important*)
  - b. Open the data file and correct the errors and then be sure to close the data file.
  - c. Re-open the Import Wizard.
  - d. Continue as outlined above.
7. You can review the data on the screen and make any changes you wish before you start the import.
8. When you click the **Start Merge** button, the system will take each row in turn and compare it against the existing data to ensure there are no duplicates (or suspected duplicates.) If it finds a suspected duplicate, you are asked if the record you are adding is the same as the one already in the database.
9. If you want to review each of the names you have just added, you can set the **Custom Filter** (on the **Maintain Names** tab) to sort by **Date Added**. All of the records you just added will be displayed at the beginning of the database browse sequence.

## Troubleshooting

Errors in formatting the data will sometimes occur especially if the Excel spreadsheet was created by another program such as QuickBooks.

When QuickBooks creates an Excel spreadsheet, it may insert a page of instructions as the first worksheet in the workbook file. Delete this worksheet since your data must be in the first worksheet in the workbook.

QuickBooks will generally insert one or more columns with hidden data to the right of the columns of data that you want to import. When you try to open a file with hidden data in place, you will get a CharityMaster error such as "The column header F1 in the file being imported is not a valid CharityMaster name" (where F1 is some hidden data.) Open the workbook in

question and select the sheet you are importing. Delete all of the columns to the right of your data. Save the file. Try importing again.

QuickBooks does not impose strict edits on fields such as telephone numbers. Sometimes users may have entered phone numbers with spaces. In this case, CharityMaster will create a blank record. Review all phone numbers in your Excel worksheet to ensure that they have no spaces.