Campaign ToolBox Import Option

Background - The Import Option is an option available at additional cost; it can be added to your license at any time. The purpose of this option is to allow the user to import contribution records from a spreadsheet or database file. It is intended only for campaigns that can establish and enforce procedures and controls that compensate for the limitations that are inherent in such an operation.

Source File - This is the tab-delimited text file that contains records that are to be imported into Campaign ToolBox. It is important that the Source File be in exactly the format described on the current version of the File Specifications Import Option for your state - any other format may result in errors and/or corrupted data.

Creating the Source File

To create a Source file using <u>Microsoft Excel</u>:
1. Create a spreadsheet exactly as described in the File Format section.
2. Click the menu item "File"
3. Select "Save as"
4. In the "Save as type" drop-down list, select "Text (Tab delimited) (*.txt)" and save the file.
Note: You may also be able to select the entire range, copy it, then paste it into a text editor.

To create the file from <u>LibreOffice</u> or <u>OpenOffice</u>:
1. Create the spreadsheet exactly as described in the File Specifications.
2. Select the cells, making sure that all columns that are in the File Specifications are included, even if they contain no data. Make sure that you do not select any additional rows (with totals, etc.).
3. Copy the selected cells, then paste them into Windows Notepad or Notepad++ or other text editor (do NOT use a regular word processor – it must be a plain text editor).
4. Save the file, making sure it has the .txt file extension.

Make sure that the file contains only records. There must NOT be any totals at the end of the file or any blank lines or anything other than the Header plus the records. There must not be any additional characters at the end of the records.

Campaign ToolBox will remember the last-used path and file name for the Source file. If the file no longer exists, the file field will be empty and you will need to select the file you want to use.

Duplicate Record Checking - Before any records are imported, the program looks at the last record in the source file and then searches the Destination File for a record with the same first name, last name, and date. If a match is found, a message is displayed with the name and date and a warning that a duplicate was found. You must then either click on Yes to continue, or No to cancel the operation. This is to help prevent accidentally importing the same file twice.

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Importation Defaults - The program will insert the following values into each record:
Contribution Source "IMPORT"
Demographic Source "IMPORT"
Contrib. Comment "Imported record - [date and time stamp]"

NOTES
• Always maintain a current backup of your database file - especially before importing a large quantity of records.
• Testing to your satisfaction is very important. The user is solely responsible for the information reported by Campaign ToolBox. If you have any questions about the accuracy and completeness of records being imported into Campaign ToolBox, make sure they are cleared up before importing them into your database file.
• The Source file must be EXACTLY as described in the Importer File Specs document. If you have extra blank lines at the end of the file, CTB Importer will try to treat them as records and will display an error. In that case, you should open the Source file using a plain text editor, set Word Wrap to OFF, and delete any extra lines or other problems.

Program Limitations - The following limitations are inherent in the attempt to link transactions with existing demographic records using the specified import data. The software user must understand and accept this risk and limitation.

Item 1
The Software will attempt to check for an existing demographic record to attach a transaction to by using the following criteria:
First Name = exact match
Last Name = exact match
Suffix = exact match
Address = first 3 characters match

In nearly all cases, this will result in linking the new transaction with the correct existing demographic record. There are, however, potential cases where there may be incorrect linking. A potential incorrect linking might be "John Doe, Sr." and "John Doe, Jr." living at the same address where no suffix is given for either one; there would be a 50% chance that the program would find the incorrect demographic record and link the transaction to that record.

Item 2
If the Source file contains more than one contribution record from the same person, and that person is not already in the Destination file, those records will be imported as different people. To avoid this, the Source file (while in the spreadsheet format) should be checked for duplicate names before importing. You will need to establish your own internal controls to assure that records are accurately imported.