

1. Create an Import Job
2. Map the file columns to the proper fields
3. Verify and Process the file

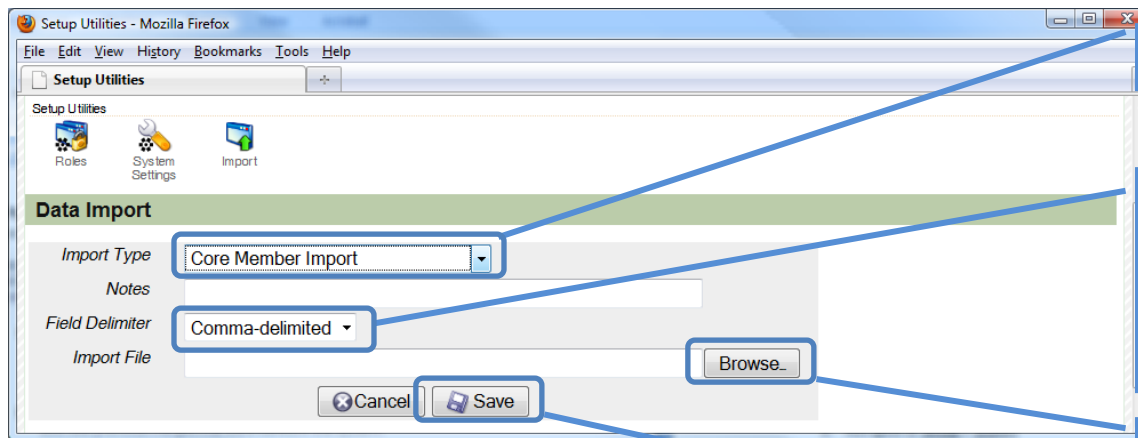
3 Easy Steps

While our product empowers you to get everything launched entirely on your own, our support department is standing by to provide any assistance you may need.

1. Create an Import Job

Navigate to the Import Tool:

Click on Setup () then Import () or click here: <https://www.volunteermatters.net/vm/member/MemberImportMain.do>



Select 'Core Member Import'

Select a File Delimiter
Our import utilities recognize coma and tab delimited text files. Both are popular formats for transferring data from one application to another. Additionally, you may save Excel spreadsheets in either format.

Click 'Browse' to select a local file to be imported

Click 'Save'

2. Map Fields

Data Import

<i>Import Type</i>	CoreMemberImport
<i>Create Date</i>	2013-04-11 12:20 PM
<i>Import Status</i>	New
<i>Status Date</i>	2013-04-11 12:20 PM
<i>Notes</i>	<input type="text"/>
<i>Field Delimiter</i>	Comma-delimited <input type="button" value="v"/>
<i>Replace Import File</i>	<input type="text"/> <input type="button" value="Browse..."/>
<i>Field Mapping</i>	
Field	Import File Field
MEMBERSHIPID	MEMBERSHIPID <input type="button" value="v"/>
SCANID	-- Not Available -- <input type="button" value="v"/>
TITLE	TITLE <input type="button" value="v"/>
FIRSTNAME	FIRSTNAME <input type="button" value="v"/>
LASTNAME	LASTNAME <input type="button" value="v"/>
MIDDLENAME	MIDDLENAME <input type="button" value="v"/>
SUFFIX	-- Not Available -- <input type="button" value="v"/>
NICKNAME	NICKNAME <input type="button" value="v"/>
MAILINGNAME	MAILINGNAME <input type="button" value="v"/>
PREVIOUS_NAME	PREVIOUS_NAME <input type="button" value="v"/>
BIRTHDATE	BIRTHDATE <input type="button" value="v"/>
MEMBERSINCE	MEMBERSINCE <input type="button" value="v"/>
ONLINEPHOTO	-- Not Available -- <input type="button" value="v"/>
EMAIL	EMAIL <input type="button" value="v"/>
ALT_EMAIL	ALT_EMAIL <input type="button" value="v"/>
PARENT_CONTACT_ID	-- Not Available -- <input type="button" value="v"/>
Contact Status	Contact Status <input type="button" value="v"/>
Contact Status As Of Date	Contact Status As Of Date <input type="button" value="v"/>
Home Telephone	Home Telephone <input type="button" value="v"/>
CustomOne	-- Not Available -- <input type="button" value="v"/>

* required

The system will list every VolunteerMatters field allowed for this import in the left column titled 'Field'.

You must match that field to the correct column heading from your import file in the right column labeled 'Import File Field'.

If the 'Import File Field' fields are very wide and contain all of the column headings it either means that you previously selected the wrong 'File Delimiter' or there is a problem with the import file itself.

Once you have properly mapped all VolunteerMatters fields with import file fields, click 'Save and Return'.

3. Verify and Process the Import File

Imports			
Import Type	Create Date	Status	Notes
Core Member Import	2013-04-11 12:20:19.0	NotVerified	details edit verify delete

[+ New Import](#)

Click 'Verify'

Verification Results	Test	Result
	Change import status to NotVerified	OK
	Parse CSV data for column headings	OK Found 23
	Verify Import Field Mappings	OK Mapped MEMBERSINCE, BIRTHDATE, Home Address 2, Contact Status As Of Date, Home Address 1, Home Telephone, Home City, NICKNAME, MIDDLENAME, MEMBERSHIPID, FIRSTNAME, MAILINGNAME, Home State, Mobile Telephone, Home Country, Work Telephone, Contact Status, EMAIL, Home Postal Code, ALT_EMAIL, TITLE, PREVIOUS_NAME, LASTNAME
	Check For Required Mappings	OK
		FAILED Required field MEMBERSHIPID missing on line 2
		FAILED Invalid EMAIL Format (howard@happydays) unknown email format on line 3
		FAILED Invalid BIRTHDATE Format (04131938) doesn't match yyyy-MM-dd or MM/dd/yyyy on line 4
	Parse import records	FAILED 4. Duplicate contact ID 1123455678 found on line 5
		FAILED 5. Unrecognized status (Contact Status:AA123) found on line 6
	Import Verification	FAILED

If there are any problems with the file it will describe the exact row in the file where the problem exists and describes the nature of the problem.

After correcting the data in the import file, you can click 'Edit' to upload the new version.

Verification Results	Test	Result
	Change import status to NotVerified	OK
	Parse CSV data for column headings	OK Found 23
	Verify Import Field Mappings	OK Mapped MEMBERSINCE, BIRTHDATE, Home Address 2, Contact Status As Of Date, Home Address 1, Home Telephone, Home City, NICKNAME, MIDDLENAME, MEMBERSHIPID, FIRSTNAME, MAILINGNAME, Home State, Mobile Telephone, Home Country, Work Telephone, Contact Status, EMAIL, Home Postal Code, ALT_EMAIL, TITLE, PREVIOUS_NAME, LASTNAME
	Check For Required Mappings	OK
	Check For Unique Contact IDs in import data	OK
	Check For required fields	OK
	Check field formats	OK
	Verify Record Count	OK 6
	Change import status to Verified	OK

[Return](#)
[Edit](#)
[Import!](#)

Once the file have been verified without any errors, Click 'Import!'

Notes on format of the import file:

- The import file must contain at least three required columns for the contacts ID (MEMBERSHIPID), First Name, and Last Name. We also highly recommend importing the Contact Status (e.g., N- New, A – Active, X – Dropped, D – Deceased, R – Resigned, S - Staff) and the Contact Status as-of Date
- All dates imported must be in mm/dd/yyyy or yyyy-mm-dd format. Excel can be problematic as it auto-converts dates into m/d/yyyy. When formatting date cells in Excel, set the number format to 'Custom' and enter mm/dd/yyyy.
- Every record must have a unique Contact ID (MEMBERSHIPID)
- If importing values for a multi-select field with multiple values, separate those values with a pipe character. For example, if you were importing data for “Favorite Pizza Toppings” and a contact had several favorites, you would have to insert their choices as “peppers|onions|meatballs| pepperoni “ (minus the quotations)
- If you are importing values that are predefined in the system, the data imported must exactly match those choices. For example, if your import file contact a contact status of “Prospect” and this was not a predefined status type in your database, you would be prompted with a message to correct this error.
- Import files must be in CSV (Comma Delimited) or Text (Tab Delimited) format.