

Preparing a Spreadsheet for Advanced Import in Salsa CRM

Agenda

Documentation Cluster

Column Headers

Spreadsheet Best Practices

Documentation Cluster

Help Articles

- Before getting started with Advanced Import, we recommend opening the **Advanced Import Documentation Cluster**
- This is a collection of articles meant to teach you how to complete an Advanced Import from start to finish
- You can access those articles [here](#).

Advanced Import

[How to: Import Data into the CRM](#)

[Advanced Import Data File Best Practices](#)

[Import Constituent Information](#)

[Import Donations with Constituents](#)

[Import Donations with Spouses as Co-Donors](#)

[Import Constituent Notes to an Existing Constituent Record](#)

[Import Multiple Constituents to Multiple Groups](#)

[Advanced Import Overview](#)

[Advanced Import Workflow](#)

[Import Spouses with Constituents](#)

[Import Pledges and Pledge Payments](#)

[Import Information to Forms](#)

[Process Import](#)

Column Headers

Where to find the column headers

- Navigate to **Tools > Data Sync > Advanced Import**
- If you need to identify any column headers, you can use the **Search all columns** box to identify what your column header should be
- Note whether the field is **Required?** and its **Max Length**
- You can name the file and select **Save Column Definitions...** to do a full download of this page
- If you just need to know the column headers, select **Create Sample File...**

Column Definitions

Search all columns: Show entries 

Column Name	Type	Required?	Max Length	Comment
Import ID	Alpha-Numeric	Yes	64	The unique constituent record number from the source file's system.
Spouse Import ID	Alpha-Numeric	No	64	The unique spouse record number from the source file's system.
Constituent Number	Numeric	No	10	The unique ID of the Constituent record from the source system.
Source Constituent UUID	Alpha-Numeric	No	36	The Salsa CRM Constituent UUID, if this constituent already exists. If provided, and the constituent record is found, it will be updated.
Source Constituent Activity Config UUID	Alpha-Numeric	No	36	The unique ID of the activity configuration that created this Constituent record, such as a unique online form ID.
Source Constituent Activity UUID	Alpha-Numeric	No	200	The ID associated with the Source Constituent Activity UUID.
Source Constituent Activity Name	Alpha-Numeric	No	200	The name associated with the Source Constituent Activity UUID.
Source Constituent Activity Type	Alpha-Numeric	No	50	The type associated with the Source Constituent Activity Type.
Constituent Type	Alpha	No	1	Valid Values: "I" (individual), "O" (organization). Defaults to "I" if omitted.
Org Type	Alpha-Numeric	Conditional	50	Required if Constituent Type is "O". Valid Values: [Blank Entry], Branch Office, Community Organization, Convio, Foundation, Other, Physicians Group, Religious Organization, School, University, Young Life

Showing 1 to 10 of 298 entries < 1 2 3 4 5 ... 30 >

Key: Constituent Columns Donation Columns Custom Columns Form Columns

Comma-Delimited Files (.csv) 

Spreadsheet Best Practices

Constituent Spreadsheets

- No formatted spreadsheet or can't export from a previous software? Use this [Excel file](#) as a template
- Are you updating existing records in your Salsa CRM? Be sure to include a **Constituent Number** column
- If you are importing constituent information only, there should be no donation or gift-related columns
- If you are importing **Individuals** and **Organizations**, you must include a **Constituent Type** column marked either **I** or **O** for each constituent
- Individual records must have **First Name** and **Last or Org Name** columns
- Addresses need to be complete, with at least **Address Line 1**, **City**, **State**, and **Postal Code**. Partial addresses are not accepted
- If you do not know the phone number type, I recommend putting everything under the **Cell Phone Number** column so you can potentially still send texts
- Organizations must have an **Org Type** column

	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last or Org Name	Org Type	Contact Name	Email	Business Phone	Cell Phone Number	Address Line 1	Address Li	City	State	Postal Code
2	Charles	Case			charles.case@bonterratech.com		8045647703	1722 Grove Ave	Apt. 3	Richmond	VA	23220
3	Liz	Ragland			liz.ragland@bonterratech.com		2025659812	1600 31st St		Washington	DC	20000
4		The Doorways	Community Organization	Preston Fox	preston.fox@thedorways.org	8049942158		612 E Marshall St		Richmond	VA	23219

Donation Spreadsheets

- No formatted spreadsheet or can't export from a previous software? Use this [Google sheet](#) as a template. Just be sure to use **File > Download > Comma Separated Values (.csv)** before using
- There are **SIX** required fields when importing donations: **Batch, Fund, Gift Amount, Gift Date, Gift Type, and Payment Type**
- There are additional required fields based on the **Payment Type** field. For example:
 - If the Payment Type is **Check**, you must also provide the **Check Date** and **Check Number**
 - If the Payment Type is **Credit Card**, you must also provide the **Credit Card Expire Date, Authorization Number, and Credit Card Number** (last 4)
 - If you do not have any of this required information, we recommend using **Cash** as your **Payment Type**
 - **IMPORTANT:** You must have Constituent information tied to each gift. If you are importing new Constituents, please use **Constituent Number** with the Constituent columns and Donation columns to make sure the importer recognizes the unique individual. If you are updating existing Constituents, please use the **Source Constituent UUID** in its place and include their Salsa CRM Constituent ID

Additional Resources

Additional Training Opportunities

Other targeted webinars available in Bonterra Academy (live and recorded)

1. Adding Salsa CRM Users
2. Creating Constituents and Supporters
3. Adding Donations
4. Managing Recurring Donations
5. Advanced Import and Resolution Queue

Visit the question bubble in your software to find Documentation or the Help Center to find a library of help articles.



Build confidence and knowledge
in our software.

Customer Support

Reach out to our Customer Support team with questions or concerns.

Available Monday through Friday, from 8am until 8pm ET.

- Submit a Support Request through the question bubble

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.