

IMPORT-O-MATIC™

THE FLEXIBLE IMPORT SOLUTION FOR THE RAISER'S EDGE®

- ➔ Import data from banks, lockboxes, mail houses, prospect lists, web sites, and patient or alumni databases efficiently and accurately
- ➔ Process constituent, address, gift, and relationship records **simultaneously**
- ➔ On-the-fly **duplicate checking** allows user to select from a list of possible matches or auto pick an exact match
- ➔ Create **multiple custom profiles** to accommodate nearly any file layout
- ➔ Optionally import gifts directly into **gift batches**
- ➔ Set **default values** for nearly any constituent or gift field
- ➔ **Merge/change** duplicate records on the fly
- ➔ Add or update addresses, as appropriate, **with the click of a button**
- ➔ Match constituents on **alias or email addresses** as well as biographical and address data
- ➔ Automatically proper case biographical information
- ➔ Significantly **decrease gift processing times** and increase efficiency



**NEW
for
2010!**

- ➔ Automatic field value translations
- ➔ Create static result queries for all records modified or added
- ➔ Automatically create or import constituent **action records**
- ➔ Import time sheets and job assignments for **volunteer records**
- ➔ Add or update individual, organization, and educational relationships.

“ Import-O-Matic has increased our gift processing productivity on small gift campaigns by 82% while eliminating some of the human error. ”

— Bill Florio, Teach for America

Address Processing

Advanced Address Processing

New Address Information

Full Address: Eric Alderman, 18 Kings Ct., Apt. B, Milwaukee, WI 53254

Type: Home

Make Preferred

Phones and Emails:

Type	Number/Email
Home	843-225-6874

Existing Addresses

% Match	Indicator	Type	Address	City	State	Zip	Sha
58	Preferred	Home	18 Kings Court	Milwaukee	WI	53254	
16	Alternate	Vacation ...	19 Otsego Lake Road	Coming	NY	13849	
16	Alternate	Rental Pr...	458 Maiese Road	Milwaukee	WI	53252	

Matching Results

Duplicate Search Matching Results

Search results:

Constit ID	First	Last	Spou.	Spou.	Address	City	State	Zip	Email
123456789	Kathy	Bowen	James	Bowen	324 Dickerson Lane	Kennedy	MN	56733	KBowen@comcastic.net
28632	Robert	Bowen	Katrina	Bowen	3235 Engager Ave	Kennedy	MN	56733	KBowen@comcastic.net
255	Kate	Bowen			5639 Rosedown Ln	Kennedy	MN	56733	

Duplicate Criteria: Last Name - 20, First Name - 1, ZIP - 4, Email Address

Match to Selected Record | Search for a Record | Add as New Record | Skip This Record

Profile Screen

Import-O-Matic Import Profile

ID: [Lockbox1] Base File: C:\Lockbox\ImportMe_Appeals.csv

Description: [Bank Lockbox Profile]

File Layout | Configuration | Defaults | Addresses

Field #	Field Name	Record Type	Value Type
1	"Appeal"	Special Field	Master ID
2	"Cons ID"	Constituent Field	ID
3	"Title"	Constituent Field	Title 1
4	"First Name"	Constituent Field	First Name
5	"Middle Name"	Constituent Field	Middle Name
6	"Last Name"	Constituent Field	Last Name
7	"Suffix"	Constituent Field	Suffix 1
8	"Salutation"	Constituent Field	Primary Salutation
9	"Orig Name"	Constituent Field	Orig Name
10	"Email"	Constituent Email - Address	Use Default Value
11	"Gender"	Constituent Field	Gender
12	"Address"	Constituent Address Field	Address
13	"City"	Constituent Address Field	City
14	"State"	Constituent Address Field	State
15	"Zip"	Constituent Address Field	ZIP
16	"Addr Type"	Constituent Address Field	Type
17	"Acknowledge"	Gift Field	Acknowledge
18	"CC Number"	Gift Field	Credit card number
19	"CC Expires"	Gift Field	Expires on
20	"CC Type"	Gift Field	Credit Type
21	"CCard Name"	Gift Field	Cardholder name

For more information or to schedule a demo, please contact us
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