

ADVANTAGES OVER STANDARD RAISER'S EDGE® IMPORT

In comparison, Import-O-Matic software offers:

- Ability to import multiple record types simultaneously: constituent, gifts, relationships, events, tribute, prospect, etc
- Advanced de-duping process: multiple duplicate criteria sets able to be used simultaneously, matching on email address, matching on non-constituent spouse relationships and/or duplicate criteria set in RE. Possible duplicates can be resolved on-the-fly
- Duplicate search on all mailing addresses and email addresses
- Ability to import IDs from your source system to the Alias and match duplicates on them.
- Select Constituent field updates and optionally see a side by side comparison of data being updated
- Additional default fields can be assigned during import process: constituency codes, addressee/salutations, attribute dates, values, etc
- Ability to remove leading zero or fix Os that were dropped from constituency IDs or zip codes in Excel
- Ability to create and reciprocate full constituent records for relationships.
- Break address link when specifying new address data for a relationship to an existing constituents
- Process multiple relationships simultaneously
- Advanced address processing: allows user to make decisions about existing and incoming addresses on-the-fly
- Ability to automatically alter old preferred address as desired: uncheck send mail to, specify dates, copy attributes/phones/emails to new address, etc
- Archive existing phone numbers and email addresses automatically when new ones imported with same type
- Proper casing – change ‘ROBERT MCDONALD’ to ‘Robert McDonald’
- Field conversions – change ‘NYC’ to ‘New York’ or ‘Capt.’ To ‘Captain’
- Apply default fields and attributes to records, such as ‘online gift’ to gifts processed without that field contained in the import file
- Enhanced Package/Appeal Processing - automatically deduce campaign and fund information from appeal defaults
- No IDs required for constituents, addresses, relationships, etc
- No Key Indicator required
- No specific file headers required
- Import gifts to gift batches
- Allow inactive gift subtypes
- Allow inactive Campaigns, Funds, Appeals, and Packages
- Auto-pick matching record from search results
- Blackbaud Direct Marketing (BBDM) Integration
- Match existing fund relationships, assigned solicitors, relationships, appeals, and proposals. IDs not required
- Ability to create static queries of constituents updated, new constituents added and gifts processed all at once
- Automatically generate output files including Import ID's of new and existing records

