

Import Module

WHAT IS IT?

eTapestry's Import module is a powerful tool that allows you to add, update, or modify your existing eTapestry data using external data files. There are many possible uses for Import including:

- **Recurring data imports** – ideal when you need to regularly add accounts from another source.
- **Data updates and appends** – add and update existing account information in mass from an outside data source.
- **Offline data entry** – input names, gifts, and other fields offline in a spreadsheet and then import them into eTapestry.

HOW DOES IT WORK?

eTapestry's Import module lets you take a text file (such as a text export from a spreadsheet) and import it into your existing database. The import could include new accounts, or updates to existing accounts. Existing accounts are matched using the eTapestry account number, a unique id stored in a user defined field, or a combination of address fields. The Import module gives you 7 processing options.

1. Account Information
2. Account Information with Single Gift
3. Account Information with Single Contact
4. Account Information with Single Note
5. Single Gift by Account Number
6. Single Note by Account Number
7. Single Contact by Account Number

By using a live mapping screen you can easily match the file headers in your import file to the appropriate fields in eTapestry. This mapping template can be saved and then reused for recurring imports. A live mapping screen lets you quickly see what the fields will look like in your eTapestry database.

Once fields are mapped, a spreadsheet-like import preview allows you to verify your layout. The Import module also includes a duplicate matching process to keep your database clean. If duplicate records are found you have the options of overwriting all existing fields, importing only new information, skipping the record to import, or keeping the current record and creating a separate new record.

SUMMARY

If you have recurring data imports, or need to update your eTapestry data from spreadsheet files, the Import module may be the tool for you. The Account Only Import has a \$250 (USD) Consulting setup fee plus 10% of your base eTapestry service. There is a minimum monthly fee of \$10 and a minimum of 3 months use of this module. Support is 10% of base support fees. The full Import module has a \$500 (USD) Consulting setup fee and costs \$100 (USD)/month for a minimum of 12 months. Support is 20% of base support fees.



For more information, contact your eTapestry representative or email us at solutions@etapestry.com.



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