



# IMPORTING DATA

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## Objectives

The purpose of this manual is to instruct users on understanding the:

- **Different types of Data Imports in the Aegis CRM**
- **Strategies for Importing Data**

## Importing Data Overview

Importing Data enables users to upload large quantities of data into the Aegis CRM without having to manually create Batches, and key in individual Transactions tied to those Batches into Rapid Entry. Users often use importing to upload Lock Box imports from their banking partners, bring in large lists of prospects for mining, or schedule regular imports from third party apps that collect Donations that need to be recorded in the CRM for analysis.

Most organizations use Rapid Entry AFTER importing data in bulk to supplement the Importing process by conducting two important functions:

- Recording quick, ad hoc Transactions for individual interactions whether via Sales calls, live phone drives, or during conferences.
- To correct any discrepancies that occur after a bulk import.

This manual explains the multiple methods for bulk importing data into the Aegis CRM. Records can be brought into the CRM a number of ways from within the **Data Center** module, **Scheduled Imports** sub-module by either choices under a **Standard Import** or a **Custom Import**. Profiles (or Import Templates) can also be set up to ease the importing of data through using the **Data Center** module, **Import Mapping** sub-module. Finally, data can also be imported for ad hoc situations via the **Batching** module, **Batch Load** module.

Each of these methods of Data Importing and Setup will be covered in this manual as well as some of the minor imports that can be done for areas such as Planned Giving.

**FTP site setup** will also be covered in this manual. FTP site access enables users to have an added layer of security for the Files imported into the Aegis CRM and is most often used and client required when conducting the Standard Types of imports found under the Data Center.

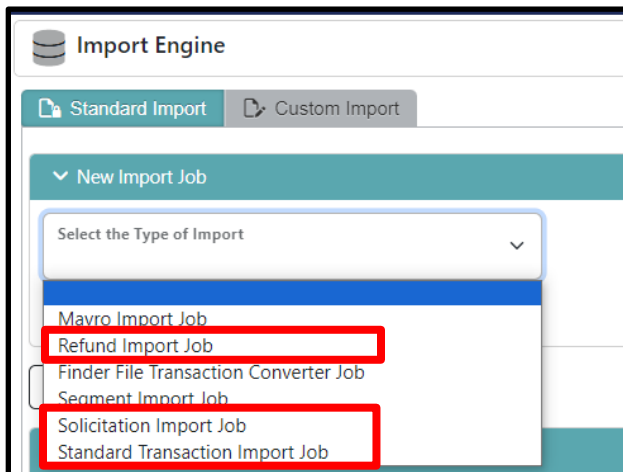
If users need to understand the methods for entering Batches and Transactions into Rapid Entry or for correcting data within that software, they should consult the **Rapid Entry and Transactions** module.

## Data Center Import Types

In the following section, users will understand the differences between the two main **Data Center** module, **Scheduled Imports** sub-module types – **Standard Import** and **Custom Import** – and when a user should choose to use the different options underneath each sub-module. Note that all the imports discussed under the Data Center are scheduled imports – part of the setup and execution of these imports is to provide a date/time, often repeatable, where the data will be selected from a distinct location, often an FTP site, for import. Ad hoc imports are done under the Batching module, Batch Load sub-module and are not done here.

### Standard Import

Standard Import displays 6 different types of schedulable Imports under the **Select the Type of Import** dropdown. The three used by clients are the **Refund Import Job**, **Solicitation Import Job**, and **Standard Transaction Import Job**. The **Mavro**, **Finder File**, and **Segment Jobs** are NOT used widely & highly configured - they are **NOT** covered in this manual.



**Refund Import Job** – Enable users to bulk refund a list of transactions. For example, if a conference were cancelled and a user needed to refund the tickets purchased for the event. Users would run the Refund and as long as the imported file contained the related invoice numbers, the Transactions would be refunded.

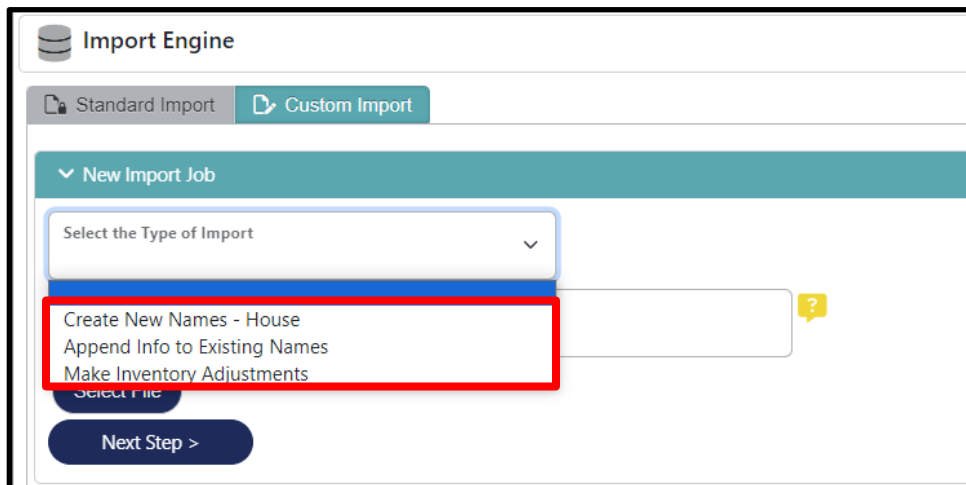
**Solicitation Import Job** – Enables users to import all the details of an Appeal Campaign created OUTSIDE of the Aegis CRM. This import would build all relevant records: Donors, Appeals, Transactions, Batches, etc. in the CRM. Most common usage is an Acquisitions/Finder File upload.

**Standard Transaction Import Job** – enable users to import Transactions that are taken client via third-party software. The import then ties the Transaction details to an existing Appeal Campaign/Record created INSIDE the Aegis CRM.



## Custom Import

The Custom Import has 3 different types of Imports that can be scheduled under the **Select the Type of Import** dropdown at the top of that section – **Create New Names – House**, **Append Info to Existing Names**, and **Make Inventory Adjustments**.



**Create New Names – House** – Enables users to import a list of names to upload to the Aegis CRM to create new Donor, Prospects, or Vendor records.

**Append Info to Existing Names** – Enables users to upload lists of information that update information on existing Donor records. Changes made are most often to Custom or Standard Flags and/or Custom Data Fields, and the Aegis stock fields of Email and Phone Number.

**Make Inventory Adjustments** – Enables users to make bulk updates to Inventory totals. Often conducted as a result of end of year Inventory audits.

## Batch Load & File Mapping

## **Batch Load**

Batch Load import capability is located under the Batching module. It enables users to create one-off imports of Batches and Transactions to cover ad hoc donation campaigns such as conference donations, telethons, or special giving drives such as Giving Tuesday. These imports are NOT set up on a scheduled cadence and do not pull from an FTP site.

Batch Load imports are focused on Transactions and are considered the ad hoc substitute for using the Data Center, **Standard Transaction Import Job**.

## **File Mapping**

The Data Center module, File Mapping sub-module, enables users to create file Profiles (types of templates) for users to repeatedly use when either importing scheduled data using the **Standard Transaction Import Job** function under the **Data Center** OR importing ad hoc groupings of data by using the **Batch Load** sub-module under the **Batching** module.

Under **File Mapping**, users create **Import Profiles** by dragging and dropping an Excel or CSV file complete with targeted data onto a page, identifying the columns in Excel/CSV that match with the CRM record fields, setting up the Import Settings, and finally loading the data to create the Batches and Transactions in the CRM. Users can also create templates whose sole purpose is to update individual Donor records and their custom flags and data.

It is a huge time saver for users to set up File Mapping Profiles when importing data in the Aegis CRM for either scheduled or ad hoc imports. Profiles help to standardize the matching of the import columns to CRM fields and avoid the costly delays in having to manually, and repeatedly, enter this information per import. And, if users do need to modify a profile, it can be done quickly and efficiently as either a permanent or temporary change to an import profile.

Due to the significance of File Mapping, we will cover that feature FIRST in coming pages before moving on to the actual importing of data.

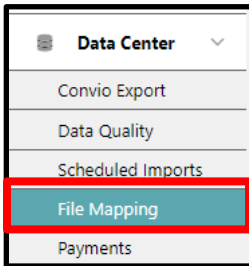
## **File Mapping**

File Mapping is the feature within the Aegis CRM that enables the setup of repeatable import mapping profiles. Profiles function as templates that allow users to quickly match the imported data in columns (from CSV or full Excel file) to the record fields they will populate when imported in the Aegis CRM.

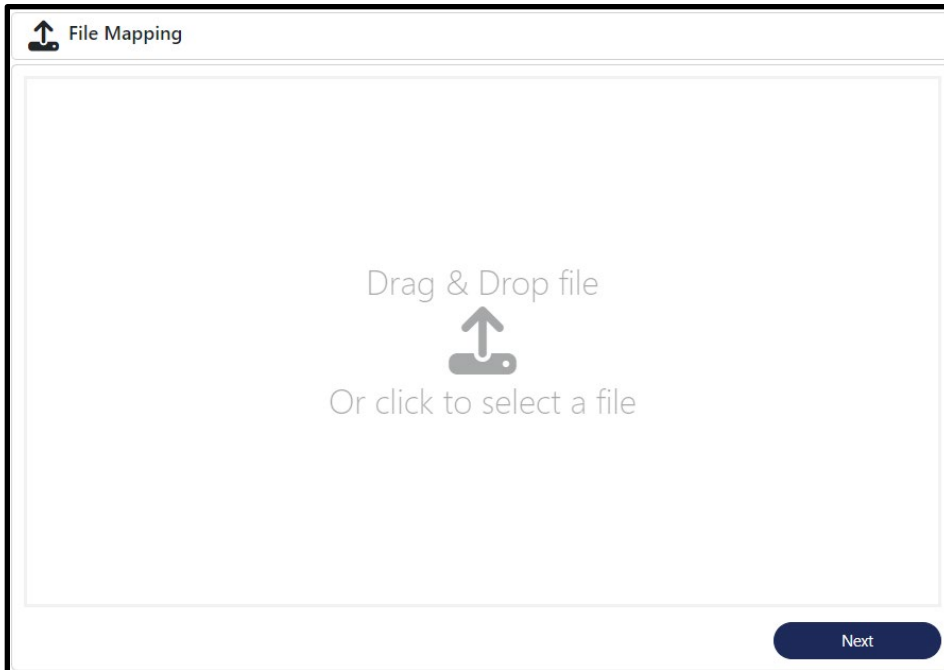
### **File Mapping Creation STEPS**

In the Steps below, users will understand how to create a Mapping profile and leverage that profile in both the Batch Load and Standard Transaction Import Job functions.

1. Click on the **Data Center** module, **File Mapping** sub-module.

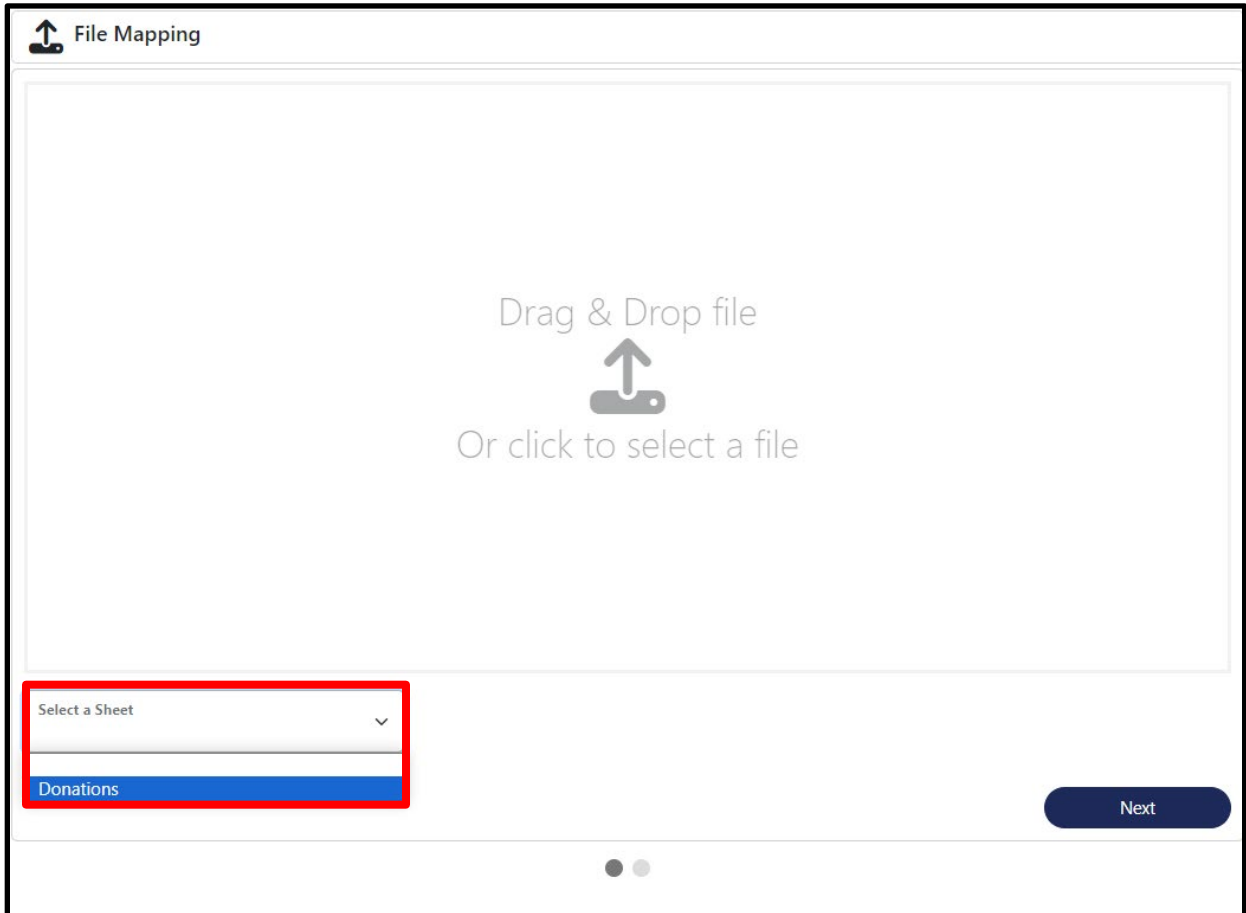


2. Users can **Drag & Drop** file Or **Click to Select a File**.
  - Drag & Drop – Users locate file in File Explorer folder and drag and drop onto screen.
  - Select a File – Users browse to location and click on file to add to screen.



3. In the example below, the **Click to Select** file option has been selected for an **Excel File**.

4. Once the file has been loaded, IF it is an **Excel** file, the user must indicate via the **Select a Sheet** dropdown, which Sheet will be used for the File Mapping.
  - If a **CSV** file is chosen, its values default and no selection is necessary.
  - Example – **Donations Sheet**



5. At the bottom of the sheet, users receive a **preview of 3 entries** from the Excel sheet to confirm that sheets layout is acceptable.

Select a Sheet  
Donations

Appeal	Transaction Amount	Partner Id	First Name	Last Name	Address	City	State	Zip	Email Address	Phone	Payment Method	Standard Flag: No Response Emails	Custom: Donor Type
24_1WT	25	40676735											Individual
24_1WT	70		Anita	Alexia	92039 Gatewood Cir	Athens	GA	30607-2010			Check	True	
24_1WT	10		Jaime	Jordan					jaime.jordan@demodata.com				

**Next**

6. Click on the **Next** button.
7. The **Mapping Info** screen displays.

- From here, users:
  - Create new, reusable **Import Profiles**
  - Map the displayed Source (**Excel**) columns to the desired Destination (**Aegis CRM**) fields via dropdowns.
- To USE an Import Profile, users would go to either:
  - **Batching>Batch Load** for a one-off/ad hoc Import.
  - **Schedule Imports>Standard Transaction Import Job** for a scheduled import.

The screenshot shows the 'File Mapping' interface. At the top left, there is an upload icon and the text 'File Mapping'. Below this is a teal header bar labeled 'Mapping Info'. On the left side, there is a dropdown menu for 'Import Profile' currently set to 'Donations'. Below the dropdown are three buttons: 'Save', 'Add New' (highlighted with a red border), and 'Import Settings'. The main area contains a table with two columns: 'Source Column' and 'Destination Column'. The 'Source Column' lists various fields: Appeal, Transaction Amount, Partner Id, First Name, Last Name, Address, City, State, Zip, Email Address, Phone, Payment Method, Standard Flag: No Response Emails, and Custom: Donor Type. The 'Destination Column' contains a series of empty dropdown menus corresponding to each source field. At the bottom right, there is a 'Back' button.

8. Click the **Add New** button to create a new mapping **Import Profile**.
9. In the **Profile Name** field, enter the desired name.
  - Example – **Standard Donations**
  - Best practice – Have each Profile Name be distinct: Conference Related, Telethon, etc.
10. Click **Save**.
11. Under the **Import Profile** field dropdown, the NEW Import Profile (Standard Donations) displays.

This is a close-up screenshot of the 'File Mapping' interface. It shows the 'Mapping Info' section. The 'Import Profile' dropdown menu is highlighted with a red box, and the selected option is 'Standard Donations'. Below the dropdown are the 'Save' and 'Add New' buttons, and the 'Import Settings' button.

**STOP STEPS – READ BELOW**

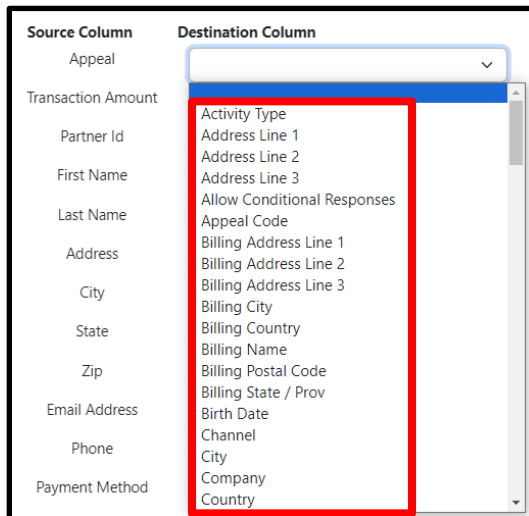
**Destination Column Division Explanations & Required Destination Import Fields**

Before mapping the displayed Source (**Excel**) columns to the desired Destination (**Aegis CRM**) fields users should read the following.

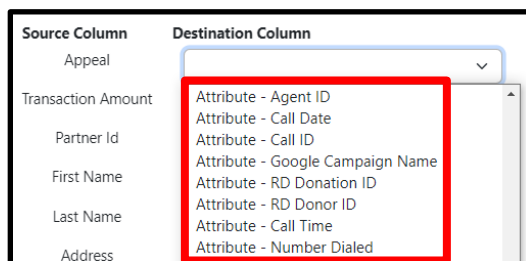
**I. Destination (Aegis CRM) Column Divisions**

Within each **Destination** column dropdown, there are FOUR distinct Field divisions to which a user can Map the **Source** fields:

- **Standard** – Fields at the TOP of dropdown list that have NO leading text. These fields are Stock Donor record fields.



- **Custom Attributes** – Fields in the SECOND area of dropdown list that have the leading text of **ATTRIBUTE**. These fields are **Transaction** record Attribute fields.



- **Custom Contacts** – fields in the THIRD area of dropdown list that have the leading text of CONTACT DATA. These fields are **Donor** record Custom fields.

Source Column	Destination Column
Appeal	
Transaction Amount	Contact Data - Planned Giving Prospect
Partner Id	Contact Data - Major Donor Stage
First Name	Contact Data - IsVolunteer
Last Name	Contact Data - VolunteerInterest
Address	Contact Data - Last Volunteer Date
City	Contact Data - CPR Certified
State	Contact Data - Donor Type
Zip	Contact Data - Retired
Email Address	Contact Data - Military
Phone	Contact Data - Member Status
Payment Method	Contact Data - Newsletter Recipient
	Contact Data - Region
	Contact Data - GrtAMT
	Contact Data - G_Stage
	Contact Data - G_Type
	Contact Data - G_Ask
	Contact Data - G_Due
	Contact Data - Bad Check Account
	Contact Data - Local Shelter Supporter
	Contact Data - Monthly Gift Contribution

- **Custom Flags** – fields in the FOURTH area of dropdown list that have the leading text of FLAG. These fields are **Donor** record Custom Flag fields.

Source Column	Destination Column
Appeal	
Transaction Amount	Flag - NoResponseEmails
Partner Id	Flag - NoResponseLetters
First Name	Flag - NoDirectMail
Last Name	Flag - NoTaxStatements
Address	Flag - NoPhoneSolicitation
City	Flag - Deceased
State	Flag - NoEmailSolicitation
Zip	Flag - NoTextSolicitation
Email Address	Flag - NoRentOrExchange
Phone	Flag - NoVisits
Payment Method	Flag - UndeliverableAddress
	Flag - NoMerge
	Flag - VIP
	Flag - UndeliverableEmail
	Flag - NoAddressStandardization
	Flag - NoProperCasing
	Flag - BAD CHK
	Flag - BOARD
	Flag - COMM
	Flag - COMM_ASST

## II. **Required Destination Import Fields**

For every Import Profile created, there is a base requirement of certain Destination fields to be present in order to drive proper mapping and/or matching. The following criteria **MUST** be met in order for a new Import Profile to save successfully.

- For an Import Profile to match EXISTING DONORS and be able to import Transactions if desired, the following fields must be added:
    - **PartnerId**
      - OR one of the following:**
        - **First Name, Last Name + Address**
        - **First Name, Last Name + Email Address**
        - **First Name, Last Name + Phone #**
    - **Amount**
    - **Appeal ID**
      - **OR CAN choose default Appeal via **Import Settings****
  
  - For an Import Profile that CREATES NEW DONORS, and be able to import Transactions if desired the following fields must be added:
    - **First Name, Last Name + Address**  
**OR**
    - **First Name, Last Name + Email Address**  
**OR**
    - **First Name, Last Name + Phone #**
    - **Amount**
    - **Appeal ID**
      - **OR CAN choose default Appeal via **Import Settings****
- 

**CONTINUE STEPS ON NEXT PAGE**



12. Match the **Source** Columns (Excel) to the different **Destination** Columns (Aegis CRM) by selecting the desired value from dropdowns
  - See example below:

The screenshot shows the 'File Mapping' interface. On the left, under 'Mapping Info', there is a dropdown for 'Import Profile' set to 'Standard Donations', and buttons for 'Save', 'Add New', and 'Import Settings'. The main area is a table with two columns: 'Source Column' and 'Destination Column'. Each row represents a mapping between a source field and a destination field.

Source Column	Destination Column
Appeal	Appeal Code
Transaction Amount	Transaction Amount
Partner Id	Partner Id
First Name	First Name
Last Name	Last Name
Address	Address Line 1
City	City
State	State / Prov
Zip	Postal Code
Email Address	Email Address
Phone	Phone Number
Payment Method	Payment Method
Standard Flag: No Response Emails	Flag - NoResponseEmails
Custom: Donor Type	Contact Data - Donor Type

13. Click on **Import Settings** in the upper left.
  - Import Settings must be configured for an Import Profile to work correctly.
  - The Import Settings used will depend upon the type of Import being done.

The screenshot shows the 'Add/Edit Standard Import Settings' dialog box. It is divided into two sections: 'Donor Settings' and 'Fund & Appeal Settings'. Each section contains several toggle switches and a dropdown menu.

**Donor Settings:**

- Throw an Error if Donor ID is Empty
- Locate Donors by Their Email Address
- Create Donors if They Don't Exist
- Force New Donors to be QC'd in Rapid Entry
- Verify Prefix and Suffix Against NameWords Table
- Enforce Title-Casing for New Donor Name Elements
- Donor ID Provided is a Third Party ID (Dropdown: Custom Data Field)
- Add Donor Note Instead of Transaction Note
- Update Donor Data
- Deduplicate and Merge Donors

**Fund & Appeal Settings:**

- Create Funds if They Don't Exist
- Throw an Error if Fund is Inactive
- Create Appeals if They Don't Exist
- Save New Appeals as Inactive
- Throw an Error if Appeal Code is Empty (Dropdown: Default Appeal Code)
- Throw an Error if Appeal is Inactive
- Create Segments if They Don't Exist

Buttons for 'Save' and 'Cancel' are at the bottom.

## Import Settings for File Mapping

Follow these guidelines to complete the **Import Settings** by highlighted **Section**.

### **Donor Settings**

Donor settings controls how **Donors** (Partners/Constituents) records are examined as they are imported into the system.

Donor Settings

- Throw an Error if Donor ID is Empty
- Locate Donors by Their Email Address
- Create Donors if They Don't Exist
- Force New Donors to be QC'd in Rapid Entry
- Verify Prefix and Suffix Against NameWords Table
- Enforce Title-Casing for New Donor Name Elements
- Donor ID Provided is a Third Party ID
- Add Donor Note Instead of Transaction Note
- Update Donor Data
- Deduplicate and Merge Donors

Custom Data Field

- Planned Giving Prospect
- VolunteerInterest
- Region1
- Bad Check Account

**Throw an Error if Donor ID is Empty** – Used IF a client ALWAYS imported an existing Donor ID into the system in their file. NOT Often.

**Locate Donors by Their Email Address** – Used so that Donors are always matched/validated against a unique email address. Often.

**Create Donors if They Don't Exist** – New Donor records created if do not already exist in the CRM. Often.

**Force New Donors to be QC'd in Rapid Entry** – Force Rapid Entry operators to review new Donor records before final import into CRM. NOT Often.

**Verify Prefix and Suffix Against NameWords Table** – Runs a check against the Prefix and Suffix NameWords Table under the Administration module. Does NOT error if found unmatched but will display results of mismatch in appended Summary File that lists unmatched values. Often.

**Enforce Title-Casing for New Donor Name Elements** – For future use of enforcing proper casing, not in use.

**Donor ID Provided is a Third-Party ID** – Enables import of Vendor provided 3<sup>rd</sup> Party ID's. NOT Often.

**Add Donor Note Instead of Transaction Note** – Adds any Note created during Rapid Entry to Donor record instead of creating Transaction specific note. Often.

**Update Donor Data** – Updates and/or overwrites existing data with whatever data is being imported. Used if client decides to flatly accept imported data as the most recent data for the Donor. Often.

**Deduplicate and Merge Donors** – If Donor imported with same data as existing CRM Donor, system will deduplicate and merge those records together. Often.

**CUSTOM DATA FIELD** dropdown – Enables users to automatically associate a client defined Custom Data Field with the imports for completion.

## Fund & Appeal Settings

Fund & Appeal settings controls how CRM existing **Funds & Appeals** records interact with the Transaction records that are imported into the system. Note: you **MUST** have a Default Appeal Code and a Default Fund Code selected.

Create Funds if They Don't Exist  
 Throw an Error if Fund Code is Empty  
 Throw an Error if Fund is Inactive  
 Create Appeals if They Don't Exist  
 Save New Appeals as Inactive  
 Throw an Error if Appeal Code is Empty  
 Throw an Error if Appeal is Inactive  
 Create Segments if They Don't Exist  
 Throw an Error if Segment Code is Empty

Default Fund Code  
 11000-000-000 -- General - Mail

Default Appeal Code  
 24\_3SM -- 2024 Summer (SOL)

**Create Funds if They Don't Exist** – IF an imported Transaction does NOT contain a CRM matching Fund, BUT does have a Fund Code listed, the system will create a new Fund Code in the CRM from the value contained in the Transaction. Often.

**Throw an Error if Fund Code is Empty** – IF an imported Transaction's listed Fund Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having a Fund Code to Import. NOT Often.

**Throw an Error if Fund is Inactive** – IF an imported Transaction's listed Fund Code is inactive, an error will be thrown. Often.

**Create Appeals if They Don't Exist** – If there is an Appeal that does NOT exist in the CRM, associated with an Imported Transaction, the system will create an Appeal record to which it will be associated. Often.

**Save New Appeals as Inactive** – When new Appeal created that did NOT exist, mark the Appeal as Inactive. Would prevent an Appeal created elsewhere with Imported Transactions from displaying in Rapid Entry for selection. NOT Often.

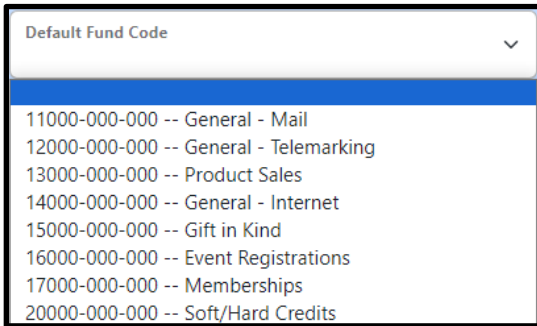
**Throw an Error if Appeal Code is Empty** – IF an imported Transaction's listed Appeal Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having an Appeal Code to Import. NOT Often.

**Throw an Error if Appeal is Inactive** – If Import attempts to match Transactions against an existing Appeal in the Aegis CRM that is inactive, an error will be thrown. Often.

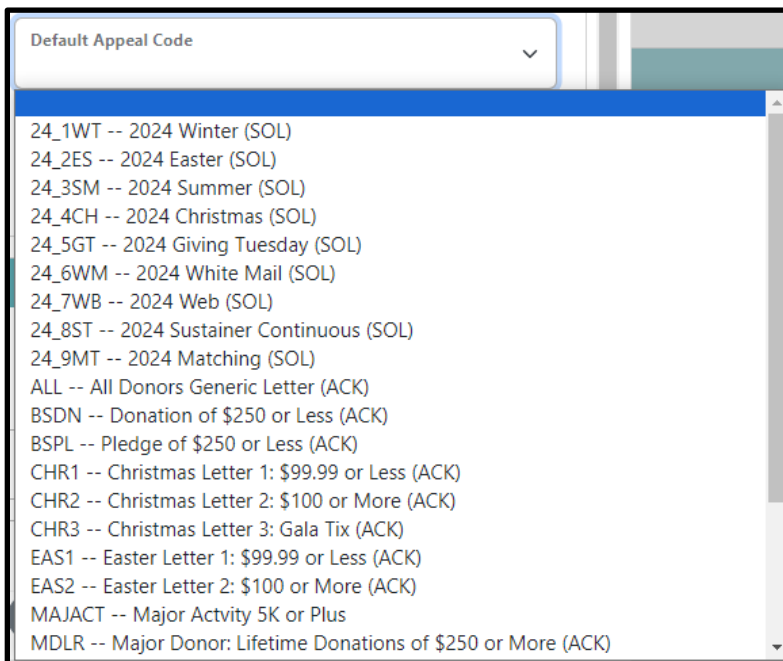
**Create Segments if They Don't Exist** – Segments loaded will be labeled, “Created by Aegis Imports, please update.” Often.

**Throw an Error if Segment Code is Empty** – Will throw an error if the Segment code field on Import is empty. NOT Often.

**DEFAULT FUND CODE** – A default **Fund Code** MUST be selected. Is the code to which the Transaction will be assigned unless otherwise specified.



**DEFAULT APPEAL CODE** – A default **Appeal Code** MUST be selected. Is the code to which the Transaction will be assigned unless otherwise specified.



## Response Settings

**Response settings** determine if a Transaction will receive a Conditional or Triggered response when Imported. For EACH of the dropdowns below, the users would choose from the values IF they did NOT check the **Process Conditional Responses** toggle at the top of the screen.

In MOST scenarios, users would want the **Process Conditional Responses** toggle selected so as to leverage the Appeal Acknowledgement ability to set up Conditional Acknowledgements.

The Trigger Responses during Import would force users to...

Response Settings ?

Process Conditional Responses

Trigger Responses During Import

Default Donation Response to Trigger

Default Order Response to Trigger

Default Split Response to Trigger

Default Pledge Response to Trigger

Default No-Money Response to Trigger

Default Donation Response to Trigger

- ALL -- All Donors Generic Letter (ACK)
- BSDN -- Donation of \$250 or Less (ACK)
- BSPL -- Pledge of \$250 or Less (ACK)
- CHR1 -- Christmas Letter 1: \$99.99 or Less (ACK)
- CHR2 -- Christmas Letter 2: \$100 or More (ACK)
- CHR3 -- Christmas Letter 3: Gala Tix (ACK)
- EAS1 -- Easter Letter 1: \$99.99 or Less (ACK)
- EAS2 -- Easter Letter 2: \$100 or More (ACK)
- MAJACT -- Major Activity 5K or Plus
- MDLR -- Major Donor Lifetime Donations of \$250 or More (ACK)
- MDLR\_CHRS -- Christmas Major Donor: Lifetime Donations of \$250 or More (ACK)
- MDPL -- Pledge of \$5000 or More (ACK)
- MDPL\_CHRS -- Christmas Pledge of \$5000 or More (ACK)
- MDSO -- Donation of \$5000 or More (ACK)
- MDSO\_CHRS -- Christmas Donation of \$5000 or More (ACK)
- TNPL -- Donations of \$10 or More (ACK)

## Product, Gift, & Pledge Settings

**Product, Gift, & Pledge** settings enable users to determine how the Import (and CRM) will manage Orders for Products.

The screenshot shows a settings panel titled "Product, Gift & Pledge Settings". At the top, there is a dropdown menu for "Warehouse Name" with the selected value "Main -- Main". Below this are three toggle switches: "Create Products if They Don't Exist", "Product SKUs May Act as Gifts", and "Line Item Types May Act as Gift Types". To the right of the second and third toggles are text input fields labeled "Comma-Delimited List of Gift SKUs" and "Comma-Delimited List of Auto Pledge Programs".

**Warehouse Name** – A Warehouse **MUST** be selected from the dropdown in order for Transactions for Product Orders to be imported. NOT Often.

**Create Products if They Don't Exist** – Will create imported Products if they do not already exist in CRM. NOT Often.

**Product SKUs May Act as Gifts** – Enables Product SKUs to act as Gifts when imported. NOT Often.

**Line-Item Types May Act as Gift Types** – Enables Line-Item Types to act as Gift Types when imported. NOT Often.

**Comma-Delimited List of Gift SKUs** – ? NOT Often.

**Comma-Delimited List of Auto Pledge Programs** – ? NOT Often.

## Batch Settings

**Batch** settings enable users to pre-set Batch information and utilize File Mapping.

Batch Settings

Batch Category to Assign  
Cash/Check General

Force New Batches to be QC'd in Rapid Entry

File Mapping

Sheet Name (Mapping Excel)

Credit Cards Have Already Been Charged

Custom Date Format

Set Batch Status to 'Closed'

**Batch Category to Assign** – Would automatically assign Batch Transactions to the selected Category. Often.

**Force New Batches to be QC'd in Rapid Entry** – Would force Rapid Entry operator to perform Quality Control on ALL new Batches. NOT Often.

**File Mapping** – Enables users to leverage the File Mapping feature for automatic mapping of Excel or CSV imports to the CRM fields. Often.

**Sheet Name (Mapping Excel)** – IF users are using File Mapping with Excel (and NOT CSV), the designated Sheet that will be imported.

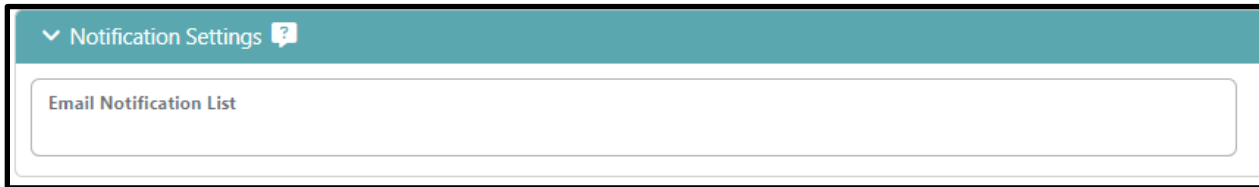
**Credit Cards Have Already Been Charged** – Toggled on would indicate the Donor's Card has already been charged for Transaction and should NOT be charged in the CRM once imported. Often.

### Custom Date Format -

**Set Batch Status to 'Closed'** – Would Close the Batch so visible and able to be processed in the CRM. Often.



**Notification** settings enable user to enter any email address that should be notified of Import status. If multiple Emails notified, Email addresses must be separated by a semi-colon. Data\_Exchange\_Notifications@Aegispremiersolutions.com will always be notified.



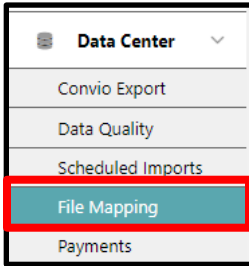
The screenshot shows a user interface for 'Notification Settings'. At the top, there is a teal header bar with a dropdown arrow and the text 'Notification Settings' followed by a help icon. Below this is a large, empty rectangular input field with a light gray border and the placeholder text 'Email Notification List'.

14. Click on **Save** on the **Import Settings** screen.
15. Click on **Save** on the **Mapping Info** screen.
16. Users can now leverage this Import Profile from both the **Batches>Batch Load** sub-module and the **Data Center>Scheduled Imports>Standard Import>Standard Transaction Import Job** locations.

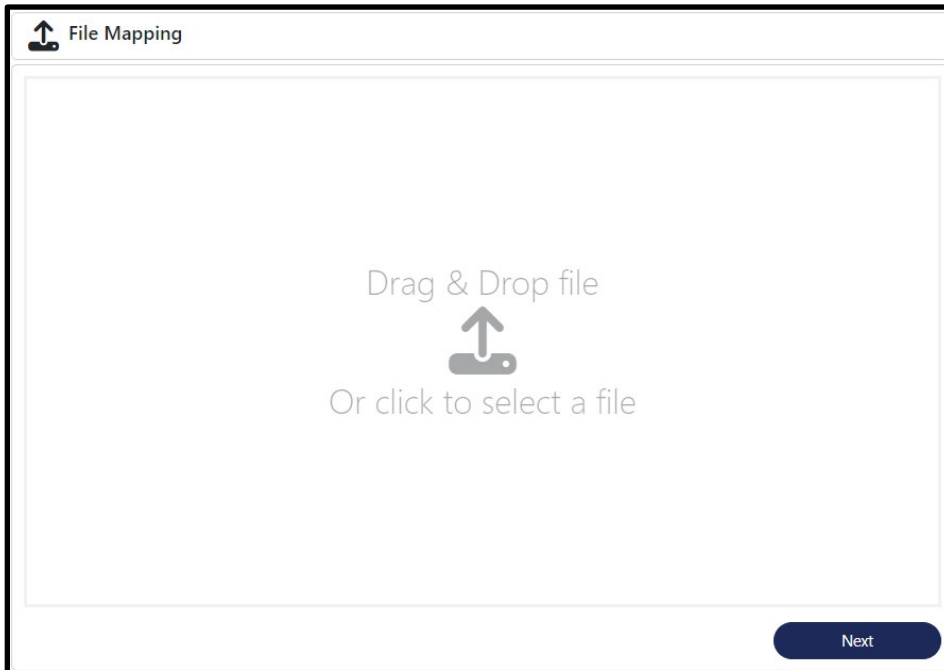
## **File Mapping Editing STEPS**

Follow these steps to edit an existing File Mapping.

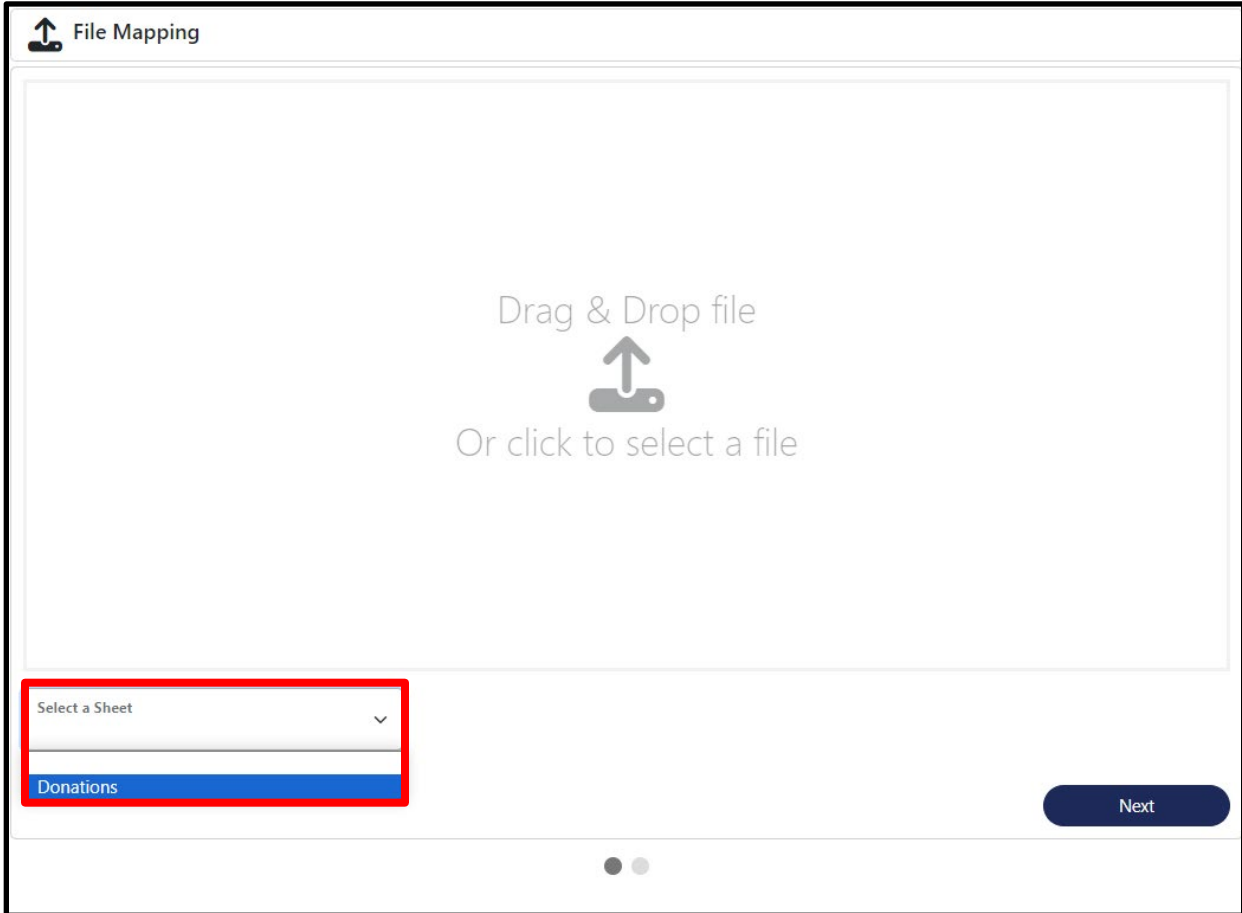
1. Click on the **Data Center** module, **File Mapping** sub-module.



2. Users need to **Drag & Drop** file Or **Click to Select a File** with which they want to replace the existing File Mapping.
  - Drag & Drop – Users locate file in File Explorer folder and drag and drop onto screen.
  - Select a File – Users browse to location and click on file to add to screen.



- Once the file has been loaded, IF it is an Excel file, the user must indicate via the **Select a Sheet** dropdown, which Sheet will be used for the File Mapping.
  - If a **CSV** file is chosen, its values default and no selection is necessary.
  - Example – **Donations Sheet**



- At the bottom of the sheet, users receive a **preview of 3 entries** from the Excel sheet to confirm that sheets layout is acceptable.

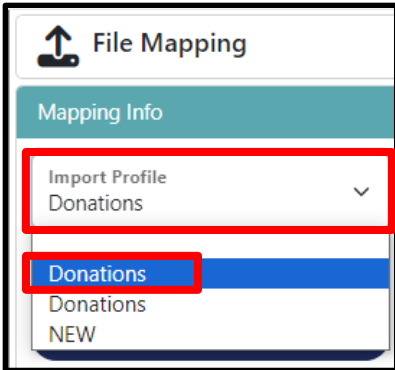
Select a Sheet  
Donations

Appeal	Transaction Amount	Partner Id	First Name	Last Name	Address	City	State	Zip	Email Address	Phone	Payment Method	Standard Flag: No Response Emails	Custom: Donor Type
24_1WT	25	40676735											Individual
24_1WT	70		Anita	Alexia	92039 Gatewood Cir	Athens	GA	30607-2010			Check	True	
24_1WT	10		Jaime	Jordan					jaime.jordan@demodata.com				

**Next**

- Click on the **Next** button.

6. The **Mapping Info** screen displays.



7. Click in the **Import Profile** dropdown and select the desired import profile to edit.

8. Any new **Destination Columns** added by new Excel/CSV selection that do NOT have values display as **BLANK**.

Source Column	Destination Column
Appeal	Appeal Code
Transaction Amount	Transaction Amount
Partner Id	Donor Id
First Name	
Last Name	
Address	

9. Users will need to fill these out for the new version of this Importing Map.

10. Once completed, click **Save**.

11. IF necessary, users should edit any **Import Settings** that require editing due to the new Excel/CSV configuration.

12. Click **Save** and the Import Profile is updated.

**NOTE:** Users CANNOT edit the **Import Profile Name**. If absolutely necessary, users can contact Support to have those values edited.

## Batch Load Imports

The Batch Load function is used in Aegis to create ad hoc or non-scheduled imports of data. It enables users to quickly upload information from CSV or Excel files into the Aegis CRM without having to do so through Rapid Entry or by utilizing the **Data Center>Scheduled Imports>Standard Import>Standard Transaction Import Job**.

It may be a better security setting for some organizations to provide access to users via the **Batch Load** under **Batching** so as to not have to make the Data Center module accessible by those same users.










### Reviewing Batch Loads

When users click on the **Batch Load** sub-module, the **Batch Load List** defaults as visible. It clearly displays the **Batches Load Number, Date, Fund and Expected Amount** (if identified), and the **Actual Amount, Expected Count, and Actual Count**.

Users are also able to view the **Batch details** by clicking on the **Eye** icon in the far-left column across from row of the desired batch to review.

### Reviewing Batch Load STEPS

1. Click on the **Eye** icon next to the desired Batch.
  - **Load Number 10** will be used for this example.

Batch Load List								
+ Add New Batch Load <span style="float: right;">Refresh</span>								
View	Load Number	Load Name	Default Batch Date	Fund	Expected Amount	Actual Amount	Expected Count	Actual Count
	10					\$35,517.56	0	837
	9					\$28,647.62	0	243
	8					\$29,917.37	0	256
	7					\$22,908.02	0	476
	6						0	0
	5					\$30,797.92	0	251
	4					\$30,797.92	0	251
	3	Transactions	01/23/2024	11000-000-000	\$147.00	\$147.00	6	6
	2	Transactions	01/23/2024	11000-000-000	\$147.00		6	0

Page size: 10 9 items in 1 pages

2. Observe the **Details** of the Batch.

Batch Load View

**Batch Load Info**

<b>Load Number:</b> 10	<b>Load Name:</b>
<b>Default Batch Date:</b>	
<b>Expected/Actual Amount:</b> \$0.00 / \$35,517.56	<b>Expected/Actual Count:</b> 0 / 837
<b>Fund ID:</b>	<b>Batch Category:</b>

Edit
Import

**Batch Load Transactions**

Activity Type	Date	Invoice Number	Donor Id	Donor	Fund	Appeal	Segment	Amount
		<input type="text" value=""/>	<input type="text" value=""/>				<input type="text" value=""/>	
Contribution	03/15/2024	<a href="#">743556</a>	<a href="#">40671562</a>	Julius Kara	11000-000-000	24_2ES	300	\$160.00
Contribution	03/15/2024	<a href="#">743557</a>	<a href="#">40011760</a>	Jaelyn Theresa	11000-000-000	24_2ES	300	\$10.00
Contribution	03/15/2024	<a href="#">743558</a>	<a href="#">40208164</a>	Denise Genevieve	11000-000-000	24_2ES	300	\$108.00
Contribution	03/15/2024	<a href="#">743559</a>	<a href="#">40279822</a>	Natalie Malia	11000-000-000	24_2ES	300	\$20.00
Contribution	03/15/2024	<a href="#">743560</a>	<a href="#">40671175</a>	Sam Kyra	11000-000-000	24_2ES	300	\$20.00

Page size: 
838 items in 168 pages

**Batch Load Info Section**

Displays previous information from Batch Load List: Load Number, Date, Expected/Actual Amount, Fund Id, Load Name, Expected/Actual Count, and Batch Category.

**Batch Load Transactions Section**

Displays the actual Transaction records for this Batch. Users can see important details including the **Contribution Type, Date, Invoice Number, Donor ID, Donor Name, Fund, Appeal, Segment, and Amount**. Users can also clearly see linked fields for both the **Invoice Number** and **Donor ID**.

3. Clicking on the **Invoice Number** takes users into the **Transaction** record and related **Invoice** information for the record.

Julius Kara - 40671562

**Transaction Summary - Contribution**

<b>Total Transaction Amount:</b>	\$160.00
<b>Balance Due:</b>	\$0.00
<b>Status:</b>	Complete
<b>Invoice ID:</b>	743556
<b>Appeal:</b>	24_2ES - 2024 Easter (SOL)
<b>Segment:</b>	300 - Gift Value 50-99.99
<b>Package:</b>	2 - First Class

4. Clicking on the back browser button returns users to **Batch Load View** screen.

5. Users can also **Edit the Batch Load** Info by clicking on the **Edit** button in the center of the screen.

Batch Load Info

Load Number:	10	Load Name:	
Default Batch Date:		Expected/Actual Count:	0 / 837
Expected/Actual Amount:	\$0.00 / \$35,517.56	Batch Category:	
Fund ID:			

**Edit** Import

6. Users may need to update the **Name, Expected Amounts,** or other information before processing the Batch.

Batch Load Edit

Batch Load Info

Name	Batch Name
Default Batch Date 04/01/2024	Batch Category Phone
Expected Amount	Expected Count
Default Fund	Default Channel Web

Save Cancel

7. Users can also choose to **Import** additional transactions to this Batch. These steps will be covered as part of **Adding New Batch Loads** in the next section.
8. Click **Cancel** to exit the **Batch Load Edit** screen.
9. Click the back browser button to return to the **Batch Load List** screen.

## Adding New Batch Loads

**Adding Batch Loads** enables users to quickly add large numbers of Transactions to the Aegis CRM. This can be done by adding an Excel or CSV file by utilizing the **+Add New Batch Load** button.

In this exercise, users will create a **Batch Load** WITH an **Import Profile** to accelerate the import process.

- To see steps on how to create a Batch Load WITH an Import Profile see the **File Mapping Creation STEPS** on page 6 of this manual.
- To see steps on how to create a Batch Load WITHOUT an Import Profile see the **Batch Load Steps** section of the **Batching & Transactions** manual.

## Adding Batch Load STEPS

1. Click on the **+Add New Batch Load** button at the top of the **Batch Load List** screen.

View	Load Number	Load Name	Default Batch Date	Fund	Expected Amount	Actual Amount	Expected Count	Actual Count
	3	Donations	04/02/2024	11000-000-000	\$130.00	\$130.00	4	4
	2					\$31,116.02	0	256
	1					\$31,116.02	0	256

Page size: 10 | 3 items in 1 pages

2. The **Batch Load Edit** and Info screen displays.

**Batch Load Edit**

Batch Load Info

Name:

Batch Name:

Default Batch Date: 04/01/2024

Batch Category: Phone

Expected Amount:

Expected Count:

Default Fund:

Default Channel: Web

**Save** **Cancel**

3. Users should name the **Batch Load** with a convention that provides them basic information about the Batch.



4. In this example the **Batch Load Name** will be **4-1-24 Transactions**, with the following values in the additional fields:

- **Name** – Donations
- **Batch Name** – April Contributions
- **Default Batch Date** – 04/01/2024
- **Batch Category** – Cash/Check General
- **Expected Amount** – \$500.00
- **Expected Count** – 5
- **Default Fund** – 11000-000-000
- **Default Channel** – Direct Mail

**Batch Load Edit**

Batch Load Info

Name Donations	Batch Name April Contributions
Default Batch Date 04/02/2024	Batch Category Phone
Expected Amount \$130.00	Expected Count 4
Default Fund 11000-000-000 - General - Mail	Default Channel Direct Mail

Save Cancel

5. Once **Save** is clicked, the **Edit/Import** buttons become available.

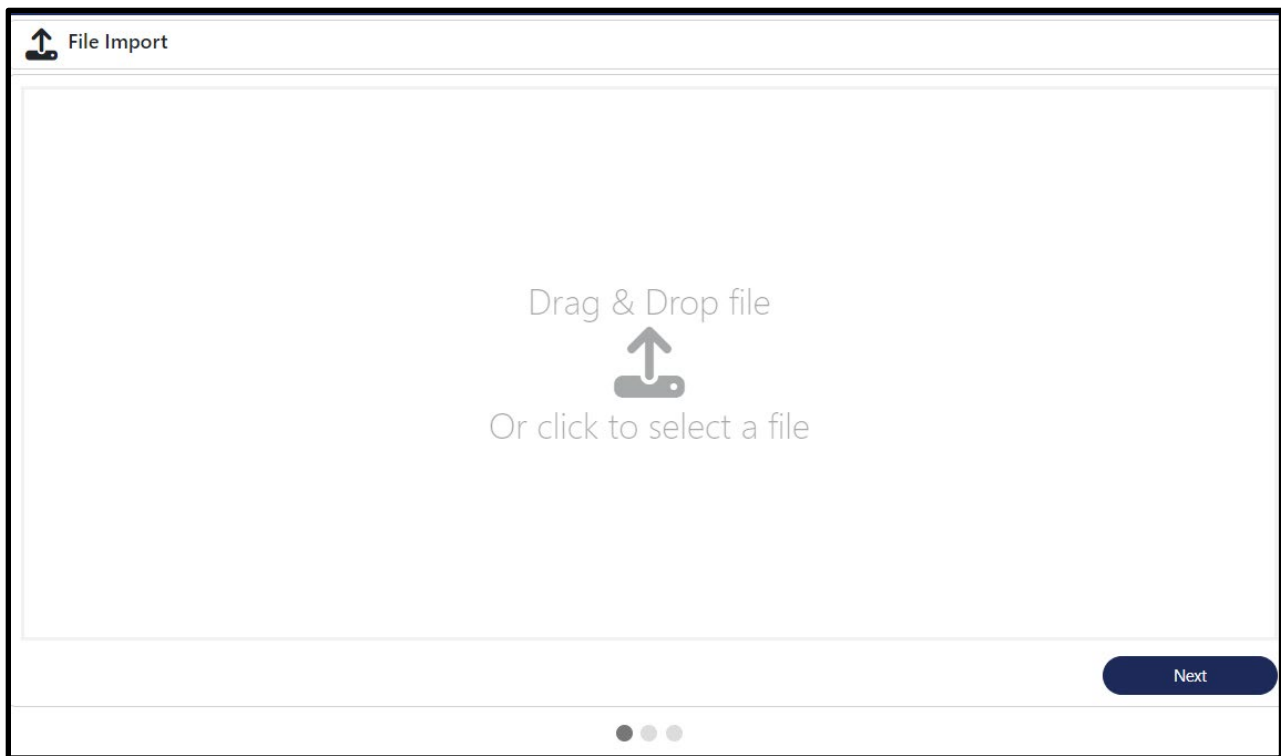
**Batch Load View**

Batch Load Info

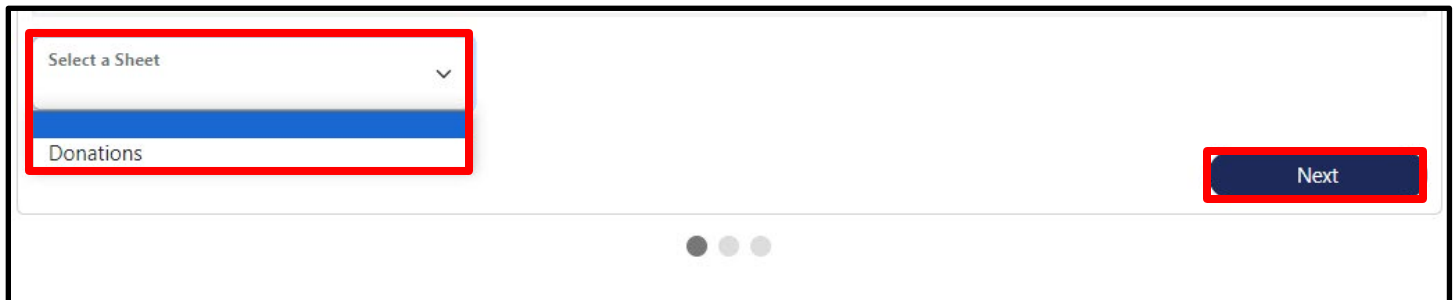
<b>Load Number:</b> 13	<b>Load Name:</b> Donations
<b>Batch Name:</b> April Contributions	<b>Default Batch Date:</b> 04/02/2024
<b>Expected/Actual Amount:</b> \$130.00 / \$0.00	<b>Expected/Actual Count:</b> 4 / 0
<b>Fund ID:</b> 11000-000-000	<b>Batch Category:</b> Phone
<b>Channel:</b> Direct Mail	

Edit Import

6. Clicking on the **Import** button enables users to **Drag and Drop file/Or click to select a file.**



7. The **...select a file** option takes the user to a **Browse** window.
8. User then **browses** and **select** the desired file.
9. Once the file is selected, the user can click the **Next** button IF the file is a **CSV** file. If the file is an **Excel** file, they must identify which **Sheet** to select in the **Select a Sheet** dropdown.



10. Clicking on the **Next** button takes the users to the **Confirmation** screen.

11. On the **Confirmation** screen, users can view a preview of the first three transactions that are to be imported to confirm the desired format.

Appeal	Transaction Amount	Partner Id	First Name	Last Name	Address	City	State	Zip	Email Address	Phone	Payment Method	Standard Flag: No Response Emails	Custom: Donor Type
24_1WT	25	40676735											Individual
24_1WT	70		Anita	Alexia	92039 Gatewood Cir	Athens	GA	30607-2010			Check	True	
24_1WT	10		Jaime	Jordan					jaime.jordan@demodata.com				

**Next**

12. Clicking on the **Next** button takes users to the **Mapping Info** screen.

13. At the **Mapping Info** screen users can:

- Create and **Save an Import Profile** – See File Mapping Creation STEPS on page 6 of this manual for instructions.
- Create a **One-off Map** of the **imported Data**.

14. In this example, user will leverage an **Import Profile** created previously under the **Data Center>File Mapping** sub-module.

- It IS highly recommended that users leverage **Import Profiles** to save time in importing.

15. Click on the **Import Profile** and select the desired saved profile.

- For this example, the **Donations** Import File is selected.
- All **Destination Column** values AND **Import Settings** load from the Profile.

**File Import**

Mapping Info

Import Profile  
Donations

Source Column      Destination Column

Transaction Amount	Appeal	Appeal Code
Partner Id		Transaction Amount
First Name		Donor Id
Last Name		First Name
Address		Last Name
City		Address Line 1
State		City
Zip		Billing State / Prov
Email Address		Billing Postal Code
Phone		Email Address
Payment Method		Phone Number
Standard Flag: No Response Emails		Payment Method
Custom: Donor Type		Flag - NoResponseEmails
		Contact Data - Donor Type

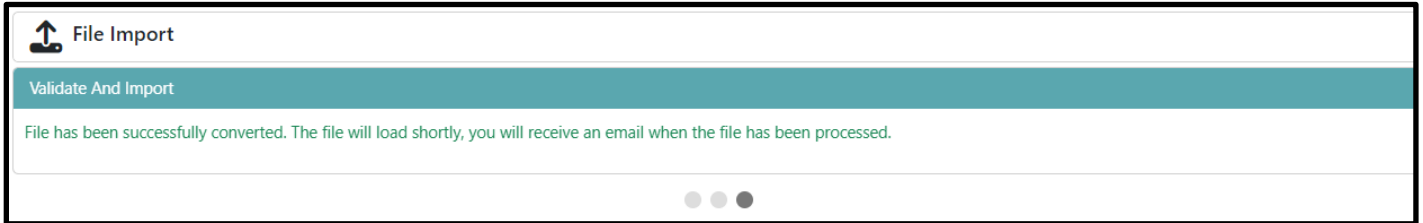
Save   Add New
Import Settings

Back   Validate & Load

16. Click on the **Validate and Load** button.

- This loads the data into the system and creates the **Transactions**.

17. Users will receive a **Success Message**.



18. Click on the **Batching** module > **Batch Load** sub-module.

- There is NO back button; users have to return via the **Navigation** menu.

19. Click on the **Eye** icon and view the updated **Transactions**.

**Batch Load List**

+ Add New Batch Load Refresh

View	Load Number	Load Name	Default Batch Date	Fund	Expected Amount	Actual Amount	Expected Count	Actual Count
	3	Donations	04/02/2024	11000-000-000	\$130.00	\$130.00	4	4
	2					\$31,116.02	0	256
	1					\$31,116.02	0	256

Page size: 10 3 items in 1 pages

20. The **Batch Load Info** and **Batch Load Transactions** load for the Import.

Batch Load View

Batch Load Info

**Load Number:** 3

**Default Batch Date:** 04/02/2024

**Expected/Actual Amount:** \$130.00 / \$130.00

**Fund ID:** 11000-000-000

**Load Name:** Donations

**Expected/Actual Count:** 4 / 4

**Batch Category:** Cash/Check General

Edit

Import

Batch Load Transactions

Activity Type	Date	Invoice Number	Donor Id	Donor	Fund	Appeal	Segment	Amount
		<input type="text" value="742585"/>	<input type="text" value="40676735"/>				<input type="text" value="700"/>	
Contribution	04/02/2024	<a href="#">742585</a>	<a href="#">40676735</a>	Martin Brody	11000-000-000	24_1WT	700	\$25.00
Contribution	04/02/2024	<a href="#">742586</a>	<a href="#">40676093</a>	Anita Alexia	11000-000-000	24_1WT		\$70.00
Contribution	04/02/2024	<a href="#">742587</a>	<a href="#">40676094</a>	Jaime Jordan	11000-000-000	24_1WT		\$10.00
Contribution	04/02/2024	<a href="#">742588</a>	<a href="#">40676095</a>	Brenda Camila	11000-000-000	24_1WT		\$25.00

⏪ ⏩ 1 ⏪ ⏩

Page size:

4 items in 1 pages

**IMPORTANT:** Imports can be complex – the importing of different Transaction Types, Import Settings adjustments, Naming conventions used, and the creation of Import Profiles, differ from import to import.

## FTP Site Setup

**FTP (File Transfer Protocol)** enables clients to set up secure internet transmission and storage of data files to be imported on a common FTP server. Access can be granted for as many designated users as the client desires. FTP is most often used when importing data via the **Data Center>Standard Imports** and most specifically for **Standard Import Transactions**. It can also be used for **Solicitation** and **Refund** imports although these files are, on average, less frequently imported. It can be optionally used with Batch Loads but is not available for Custom Imports.

### FTP Site Access Request

To utilize the FTP function, clients initially **Must Contact Support** to request the creation of a gateway, FTP file location on the Aegis shared FTP site. Once contacted, clients are provided with:

- An **Account Request Sign-up** form to complete & return to Support.
- The **Transaction** and **Solicitation** File Format Templates for importing data using those import types

Once clients are granted FTP access, they will receive the following STANDARD import permissions for **Files**:

- **Download**
- **Upload**
- **Zip**
- **Unzip**

Users can additionally request ADVANCED file import permissions for **Folders**, so they can:

- **Rename**
- **Delete**
- **Create**

**Advanced Folder** permissions can be helpful in:

- Creating sub-folders for general Import Types such as Refunds, Solicitations, or Transactions.
- Creating sub-folders for specific Transaction Import Types such as Credit Cards or Checks.

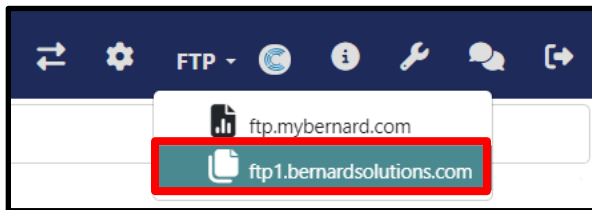
## **FTP DEMO**

With access to FTP, users now have a secure location to store their data files. An overview of how FTP site access works, the structure of the FTP, and how to upload a file for importing is covered in a demo of an existing site in the following steps.

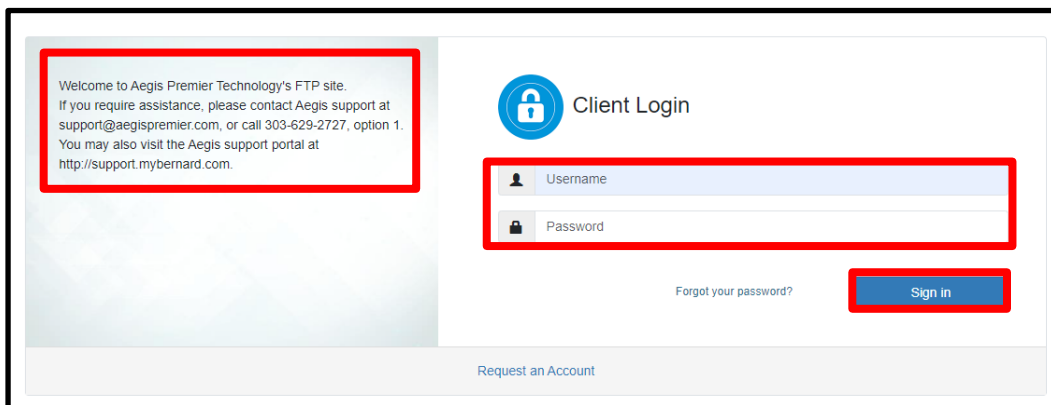
1. From the **Access** menu (Upper right-hand corner of **Aegis CRM**), click on the **FTP** button.



2. From the FTP button dropdown, select the <ftp1.bernardsolutions.com> option.
  - NOTE: The <ftp.mybernard.com> site is used for Aegis Queries and Reports storage and is NOT used for Imports.



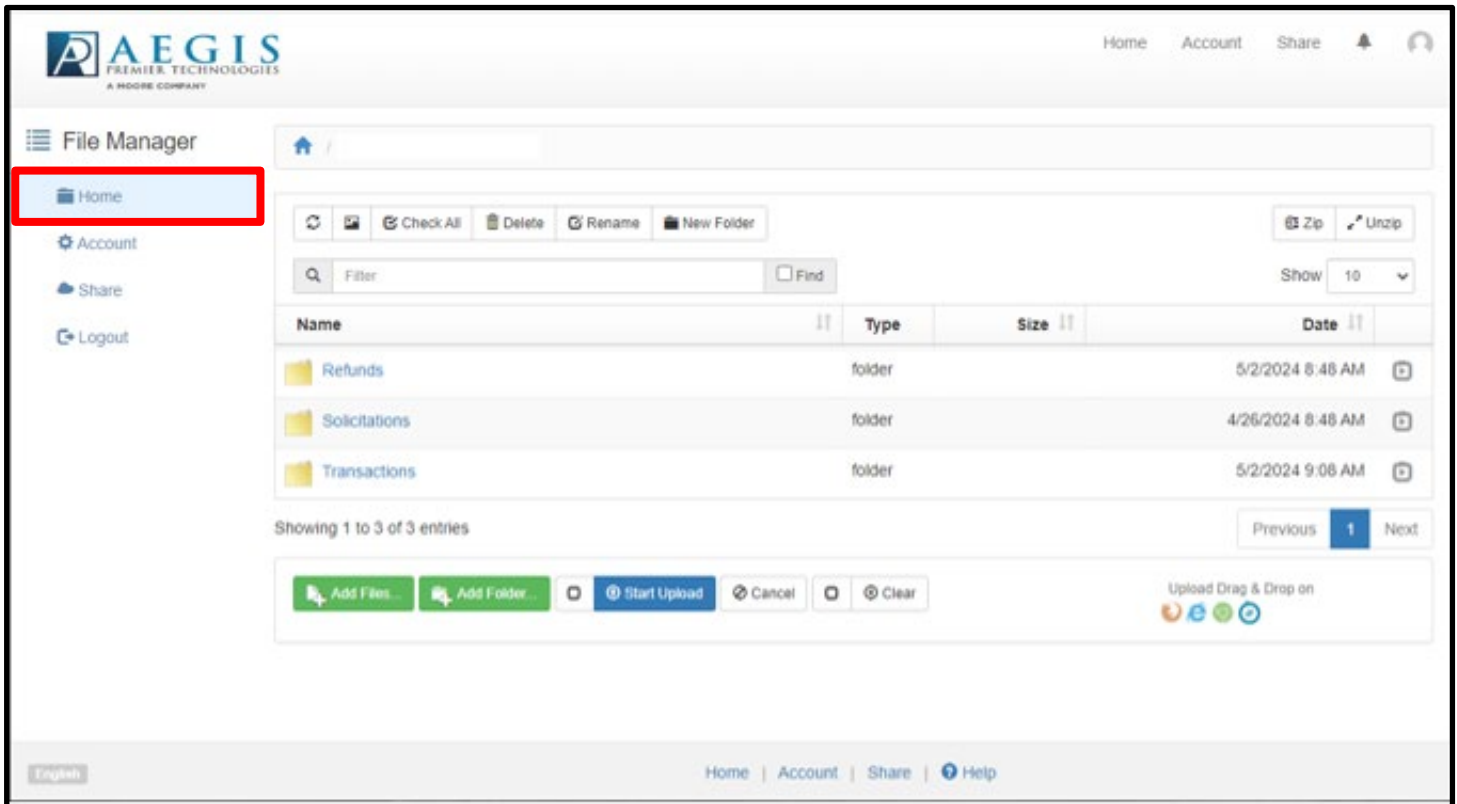
3. The Client Login page will display.
  - Users can follow the left-hand instructions to request an Account from Support if attempting initial entry.



4. If users have already received access, they can enter a **User Name** and **Password** and click **Sign In**.

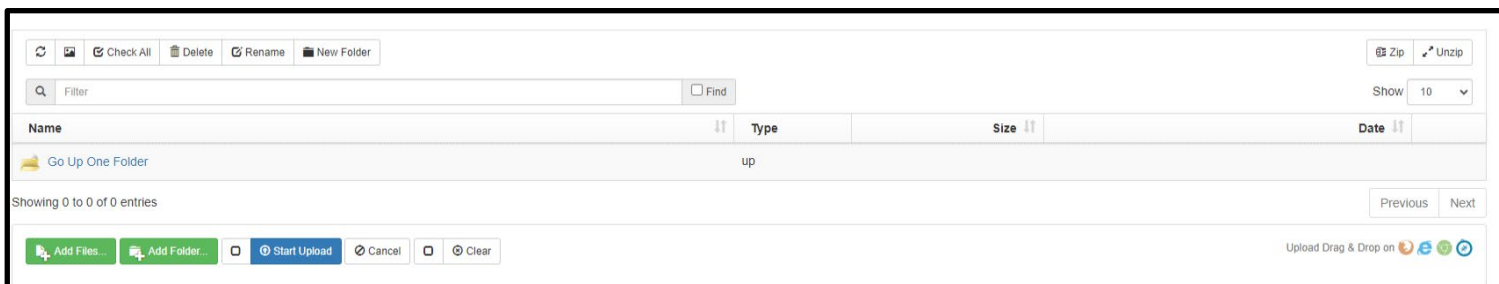
5. Users land on the **File Manager>Home** screen.

- From this location, users view EITHER:
  - **Files** previously uploaded for one type of Import
  - **File Folders** to differing types of Imports



6. In this Demo, the user has folders for different types of Imports: **Refunds**, **Solicitations**, and **Transactions**.

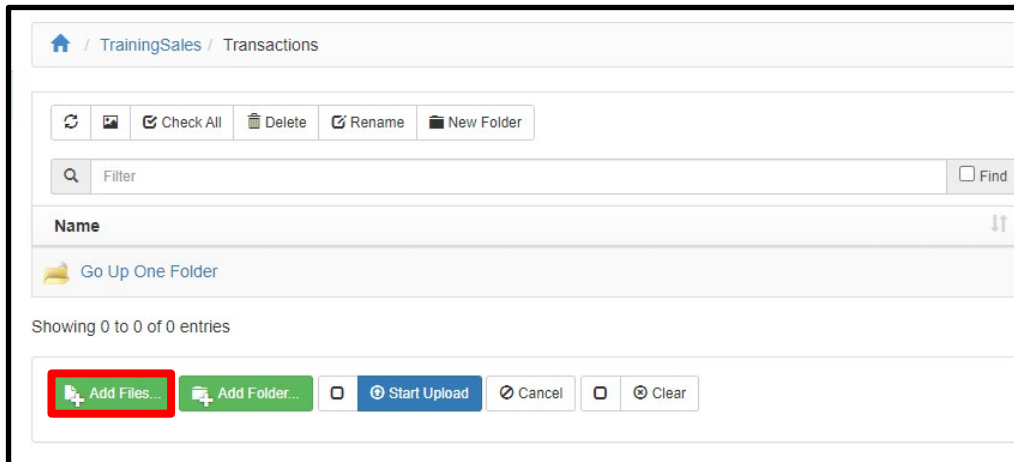
7. Clicking on the **Transaction** File Folder takes users to the Files this user has available for **Standard Transaction Imports**.



8. No files are currently uploaded.

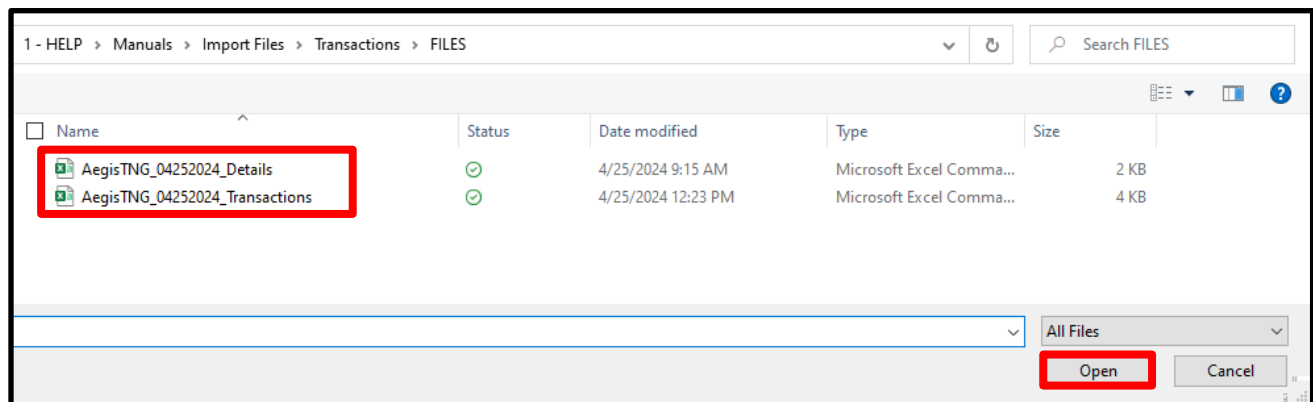


9. To add files to upload into the FTP, the user clicks the **Add Files** button.



10. Users then **Browse** to the file location and select the desired **Files**.

- In this scenario users must upload BOTH a **Details** and **Transactions** File.



11. Click the **Open** button to Add the files.

- Users can also Drag and Drop the files as desired.

12. A **File Preview** will display below the Uploaded area.

Home / TrainingSales / Transactions

Refresh 
  Check All 
  Delete 
  Rename 
  New Folder

Show 10

Name	Type	Size	Date
Go Up One Folder	up		
Showing 0 to 0 of 0 entries			
<input type="button" value="Add Files..."/> <input type="button" value="Add Folder..."/> <input type="button" value="Start Upload"/> <input type="button" value="Cancel"/> <input type="button" value="Clear"/> Upload Drag & Drop on			
AegisTNG_04252024_Transactions.csv		3.56 KB	<input type="button" value="Start"/> <input type="button" value="Cancel"/>
AegisTNG_04252024_Details.csv		1.76 KB	<input type="button" value="Start"/> <input type="button" value="Cancel"/>

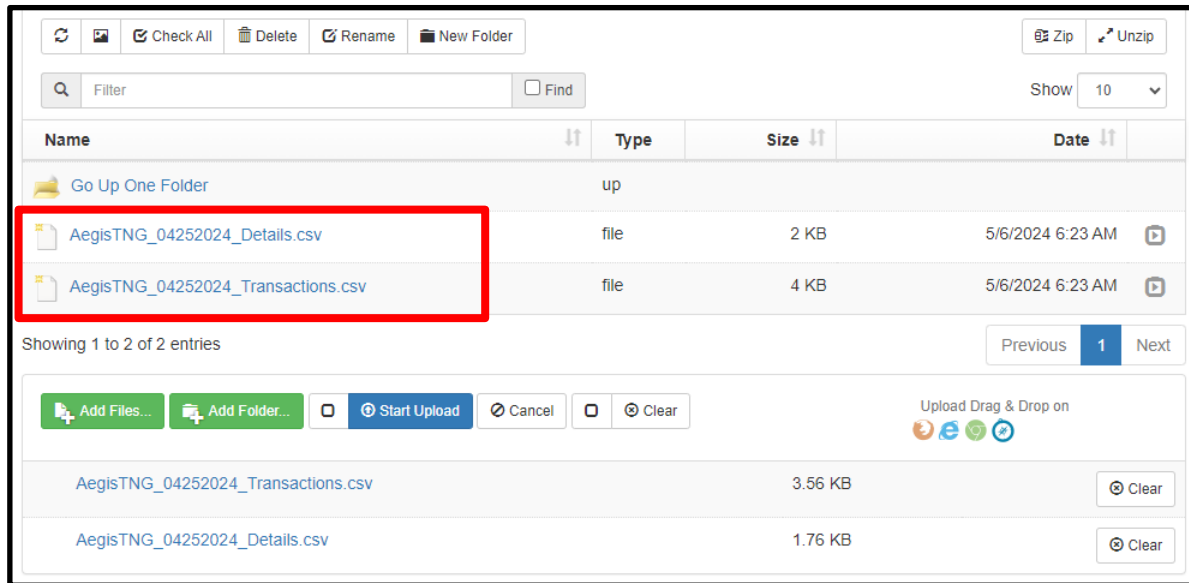
13. Users must click either the **Start Upload** button to upload ALL files displayed in Preview OR click the **Start** button to the right of each file listed to upload the files individually.

- Users can also **Cancel** the Operation and or **Clear** all or Individual files.

Upload Drag & Drop on

AegisTNG_04252024_Transactions.csv	3.56 KB	<input type="button" value="Start"/> <input type="button" value="Cancel"/>
AegisTNG_04252024_Details.csv	1.76 KB	<input type="button" value="Start"/> <input type="button" value="Cancel"/>

14. Once the files are uploaded, they display in the **File** area and are available for upload into the CRM.



15. Users can set up the Imports from the Aegis CRM site to pull the latest file automatically from this location on a scheduled basis.

**IMPORTANT:** The **Required File format** for any Aegis CRM Import is very specific. When setting up an initial Import of ANY Import Type - **Transaction**, **Solicitation**, or **Refund** - user should ask the Support team for the appropriate templates.

## Standard Import Jobs LANDING PAGE

Standard Import Jobs are found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Standard Import** tab.

From this page users can interact with three sections: the **New Import Job**, **Current Jobs**, and **Jobs with Summary Information**.

**New Import Jobs** enables users to create a New **Refund**, **Solicitation**, or **Transaction** Import Job.

- EACH of these jobs are covered in separate sections following this area in lieu of an overview here.

**Current Jobs** enables users to view the jobs that are still in process or on schedule to occur or continuously run. Users can also view and edit the job Settings, Schedule, can Clone the job, and Deactivate if necessary.

**Jobs With Summary information** enables users to view past jobs and their summary information. There is no editing available.

Import Engine

Standard Import
Custom Import

▼ New Import Job

Select the Type of Import
▼

Standard Transaction Import J

Create New Import

Refresh All Lists

Current Jobs

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Edit	Job
Transaction Import	Transaction Import - Sales	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	01/24/2024 12:25:13 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>

Jobs With Summary Information

Job Type	Description	Created By	Status	Date Completed	Records Processed	Errors Found	Dropped Records	Records Imported
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	04/28/2024 6:01:54 AM	831	0	0	831
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	03/28/2024 6:01:46 AM	831	0	0	831
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	02/28/2024 6:00:47 AM	250	0	13	237
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	02/06/2024 7:15:19 AM	250	0	0	250
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	01/26/2024 1:46:52 PM	238	0	0	238

## **Current Jobs OVERVIEW**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Standard Import Tab**.
3. Observe the top, **Current Job** section – all current jobs are displayed here.
  - In this example a recurring Transaction Import job is displayed complete with columns:
    - Job Type
    - Description
    - Created By
    - Schedule
    - Last Run Time
    - Next Run Time
    - Date Created

Current Jobs								
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▾	Edit	Job
Transaction Import	Transaction Import - Sales	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	01/24/2024 12:25:13 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>

4. The FAR RIGHT TWO Columns enable users to **Edit** and modify the **Job**.
5. Clicking on the **Settings** link enables users to edit the **Import Settings** if desired.

✕ Add/Edit Standard Import Settings

**FTP Settings**

Delete Remote Files

PGP

**Donor Settings**

Throw an Error if Donor ID is Empty

Locate Donors by Their Email Address

Create Donors if They Don't Exist

Force New Donors to be QC'd in Rapid Entry

Verify Prefix and Suffix Against NameWords Table

Enforce Title-Casing for New Donor Name Elements

Donor ID Provided is a Third Party ID

Add Donor Note Instead of Transaction Note

Update Donor Data

Deduplicate and Merge Donors

6. Clicking on the **Schedule** link enables users to edit the **Job's** timing if desired.

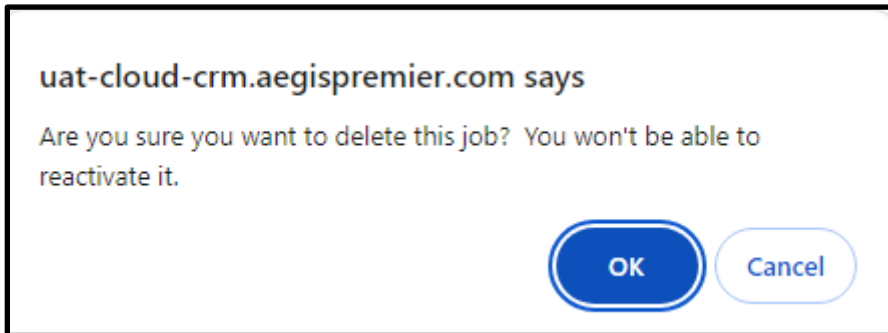
The screenshot shows the 'Edit Schedule' pop-up window. At the top, the job description is 'Transaction Import - Sales'. Below it is a 'Note' field. The 'Start Date' is set to 01/24/2024, and the 'Time of Day' is 6:00 AM, with 'Mountain Time' selected. The scheduling frequency is set to 'Monthly'. A grid of months from January to December is shown, with checkboxes for each month. Below this is the 'Email Notifications' section, which includes 'Available Users' (Rashmi C, Test User) and 'Selected Users' (Dave O'Connell). At the bottom, there is an 'Additional Addresses' field with the email lwall@wearemoore.com and a 'Schedule Task' button.

7. Clicking on the **Clone** link enables users to create an exact Copy of the **Import Settings**, bypasses that screen, and takes the user to the **Schedule** pop-up.

The screenshot shows the 'Edit Schedule' pop-up window. At the top, the job description is blank. Below it is a 'Note' field. The 'Start Date' is set to 05/03/2024, and the 'Time of Day' is 9:36 AM, with 'Mountain Time' selected. The scheduling frequency is set to 'Once'. Below this is the 'Email Notifications' section, which includes 'Available Users' (Dave O'Connell, Rashmi C, Test User) and 'Selected Users' (empty). At the bottom, there is an 'Additional Addresses' field with the email lwall@wearemoore.com and a 'Schedule Task' button.

8. Clicking on the **Deactivate** button ends the current Job's activity and ceases its Schedule.


- NOTE the clearly indicated warning – **You WON'T be able to reactivate it.**



**Jobs With Summary Information OVERVIEW**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Standard Import Tab**.
3. Observe the second section – **Jobs With Summary Information** – all past, completed jobs are displayed here.
  - In this example a recurring Transaction Import job is displayed complete with columns:
    - Job Type
    - Description
    - Created By
    - Status
    - Date Completed
    - Records Processed
    - Errors Found
    - Dropped Records
    - Records Imported

Jobs With Summary Information										
Job Type	Description	Created By	Status	Date Completed ▼	Records Processed	Errors Found	Dropped Records	Records Imported	More Details	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	04/28/2024 6:01:54 AM	831	0	0	831	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	03/28/2024 6:01:46 AM	831	0	0	831	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	02/28/2024 6:00:47 AM	250	0	13	237	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	02/06/2024 7:15:19 AM	250	0	0	250	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	01/26/2024 1:46:52 PM	238	0	0	238	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	01/26/2024 12:49:25 PM	238	0	0	238	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	01/24/2024 1:38:43 PM	245	0	0	245	?	
Transaction Import	Transaction Import - Sales	Laurice Wall	Completed	01/24/2024 12:27:06 PM	245	0	0	245	?	
Transaction Import		Dave O'Connell	Completed	01/23/2024 8:54:22 AM	5	0	0	5	?	

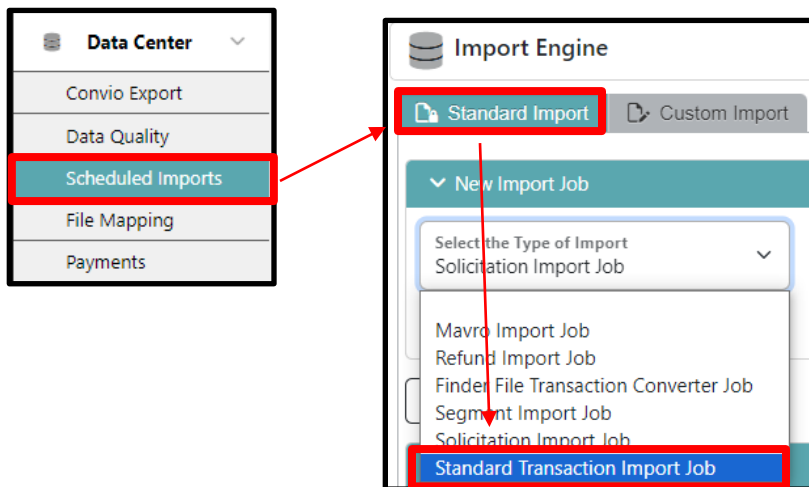
4. At the END of each row is an information icon –  – which when clicked displays Summary information regarding the job:

Import Details	
Batch Errors:	0
Info Messages:	7
Total Dollar Amount:	\$36,407.31
Total Donation Amount:	\$35,215.56
Total Order Amount:	\$1,191.75
Total Pledge Amount:	\$130.00
Pledges Created:	6
Donors Created:	5
Batches Created:	7



## Standard Transaction Imports

Standard Transaction Imports are found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Standard Import** tab. They are the most commonly executed imports in the Aegis system which is why they are covered first in this section.



**Standard Transaction Imports** enable users to import Transactions that are taken client via third-party software. The import then ties the Transaction details to an existing Appeal Campaign/Record created INSIDE the Aegis CRM.

**NOTE:** If an Import Load fails, users must RENAME the Import file in FTP once corrected, or the system will NOT accept the file.

### Standard Transaction Import STEPS

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Standard Import Tab**.
3. From **Select the Type of Import** - choose **Standard Transaction Import Job**.

4. Click on the **Create New Import** button.

Add/Edit Standard Import Settings

Import Type

FTP Settings

FTP Site

FTP Port

FTP Protocol  
SSH (SFTP)

Username  
doconnell@wearemoore.com

Password  
.....

Remote Directory

Delete Remote Files

PGP

Donor Settings

Throw an Error if Donor ID is Empty

Locate Donors by Their Email Address

Create Donors if They Don't Exist

Force New Donors to be QC'd in Rapid Entry

Verify Prefix and Suffix Against NameWords Table

Enforce Title-Casing for New Donor Name Elements

Donor ID Provided is a Third Party ID

Custom Data Field

Add Donor Note Instead of Transaction Note

Update Donor Data

Deduplicate and Merge Donors

Save Cancel

5. Users should review each of the Import Setting sections on the following pages for a **Standard Transaction Import**.

- The most common fields are highlighted & used in the screen examples.

### Import Type

**Import Type** is where user should provide a unique name by which they will recognize the Job.

Import Type

## FTP Settings

**FTP Settings** controls the interactions with the FTP Site to which clients can securely upload and post Import files. Once the Site is initially set up for the scheduled import, the user will not need to enter it again.

To use the FTP Settings, users will need to first get **FTP access** from the **Support** group. Directions on obtaining that access and how to set up the FTP site and upload files are located on **Pages 25-30** of this manual.

The screenshot shows a configuration panel titled "FTP Settings" with a help icon. It contains several input fields and toggle switches:

- FTP Site:** ftp1.bernardsolutions.com
- FTP Port:** 22
- FTP Protocol:** SSH (SFTP) (dropdown menu)
- Username:** doconnell@wearemoore.com
- Password:** [masked with dots]
- Remote Directory:** /transactions
- Delete Remote Files:** [checked toggle]
- PGP:** [checked toggle]

**FTP Site** – This is the actual site address for the Aegis CRM FTP site and should always contain: **ftp1.bernardsolutions.com**

**b** – This is the SECURE port address for the Aegis CRM FTP site and should always contain **22**.

- Users will get an error if attempting to use an unsecure port – 21 or if the Port is left blank.
- Clients can work with Support to set up different ports with strict security guidelines if desired.

### **FTP Protocol = SSH (SFTP)**

**Remote Directory** – Equals the name of the FTP folder AND sub-folder (if one exists) where the file to import is located.

- Ensure that there is a leading slash and one in between any folders – NO Spaces in name – see examples below:
  - One Folder: **/Transactions**
  - Two Folders: **/TrainingSales/Transactions**

## Donor Settings

Donor settings controls how **Donors** (Partners/Constituents) records are examined as they are imported into the system.

The screenshot shows the 'Donor Settings' configuration page. It features a teal header with a dropdown arrow and a help icon. Below the header are ten toggle switches, each with a label. The first toggle is off, while the others are on. To the right of the toggles is a dropdown menu titled 'Custom Data Field' with a downward arrow. The dropdown menu is open, showing four options: 'Planned Giving Prospect', 'VolunteerInterest', 'Region1', and 'Bad Check Account'.

**Throw an Error if Donor ID is Empty** – Used IF a client ALWAYS imported an existing Donor ID into the system in their file. NOT Often.

**Locate Donors by Their Email Address** – Used so that Donors are always matched/validated against a unique email address. Often.

**Create Donors if They Don't Exist** – New Donor records created if do not already exist in the CRM. Often.

**Force New Donors to be QC'd in Rapid Entry** – Force Rapid Entry operators to review new Donor records before final import into CRM. NOT Often.

**Verify Prefix and Suffix Against NameWords Table** – Runs a check against the Prefix and Suffix NameWords Table under the Administration module. Does NOT error if found unmatched but will display results of mismatch in appended Summary File that lists unmatched values. Often.

**Enforce Title-Casing for New Donor Name Elements** – For future use of enforcing proper casing, not in use.

**Donor ID Provided is a Third-Party ID** – Enables import of Vendor provided 3<sup>rd</sup> Party ID's. NOT Often.

**Add Donor Note Instead of Transaction Note** – Adds any Note created during Rapid Entry to Donor record instead of creating Transaction specific note. Often.

**Update Donor Data** – Updates and/or overwrites existing data with whatever data is being imported. Used if client decides to flatly accept imported data as the most recent data for the Donor. Often.

**Deduplicate and Merge Donors** – If Donor imported with same data as existing CRM Donor, system will deduplicate and merge those records together. Often.

**CUSTOM DATA FIELD** dropdown – Enables users to automatically associate a client defined Custom Data Field with the imports for completion.

## Fund & Appeal Settings

Fund & Appeal settings controls how CRM existing **Funds & Appeals** records interact with the Transaction records that are imported into the system. Note: you **MUST** have a Default Appeal Code and a Default Fund Code selected.

Create Funds if They Don't Exist  
 Throw an Error if Fund Code is Empty  
 Throw an Error if Fund is Inactive  
 Create Appeals if They Don't Exist  
 Save New Appeals as Inactive  
 Throw an Error if Appeal Code is Empty  
 Throw an Error if Appeal is Inactive  
 Create Segments if They Don't Exist  
 Throw an Error if Segment Code is Empty

Default Fund Code  
 11000-000-000 -- General - Mail

Default Appeal Code  
 24\_3SM -- 2024 Summer (SOL)

**Create Funds if They Don't Exist** – IF an imported Transaction does NOT contain a CRM matching Fund, BUT does have a Fund Code listed, the system will create a new Fund Code in the CRM from the value contained in the Transaction. Often.

**Throw an Error if Fund Code is Empty** – IF an imported Transaction's listed Fund Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having a Fund Code to Import. NOT Often.

**Throw an Error if Fund is Inactive** – IF an imported Transaction's listed Fund Code is inactive, an error will be thrown. Often.

**Create Appeals if They Don't Exist** – If there is an Appeal that does NOT exist in the CRM, associated with an Imported Transaction, the system will create an Appeal record to which it will be associated. Often.

**Save New Appeals as Inactive** – When new Appeal created that did NOT exist, mark the Appeal as Inactive. Would prevent an Appeal created elsewhere with Imported Transactions from displaying in Rapid Entry for selection. NOT Often.

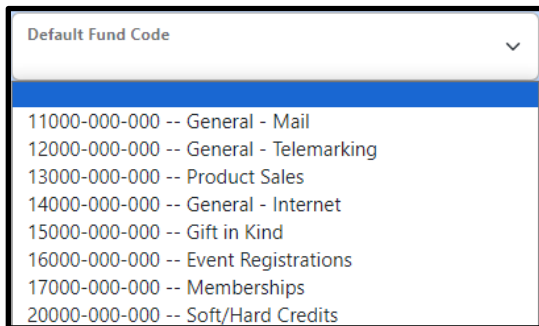
**Throw an Error if Appeal Code is Empty** – IF an imported Transaction's listed Appeal Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having an Appeal Code to Import. NOT Often.

**Throw an Error if Appeal is Inactive** – If Import attempts to match Transactions against an existing Appeal in the Aegis CRM that is inactive, an error will be thrown. Often.

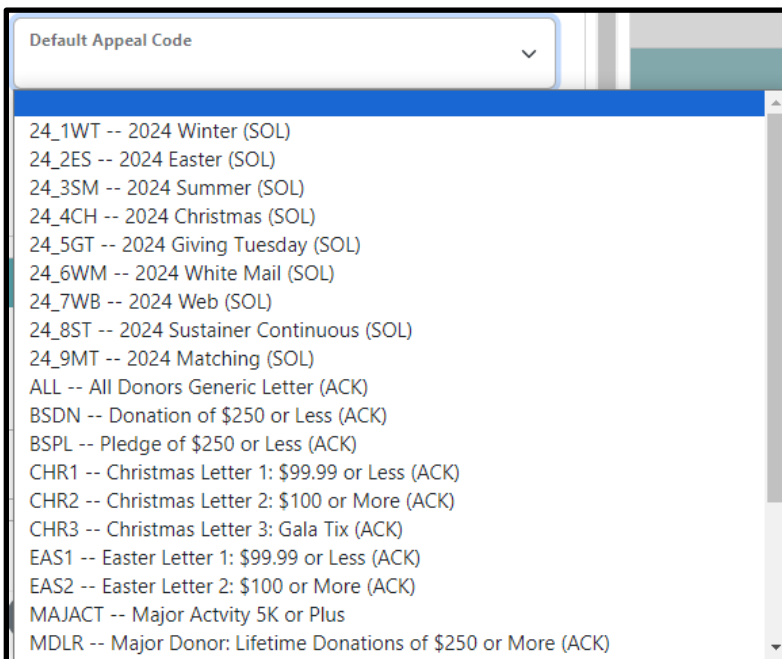
**Create Segments if They Don't Exist** – Segments loaded will be labeled, “Created by Aegis Imports, please update.” Often.

**Throw an Error if Segment Code is Empty** – Will throw an error if the Segment code field on Import is empty. NOT Often.

**DEFAULT FUND CODE** – A default **Fund Code** MUST be selected. Is the code to which the Transaction will be assigned unless otherwise specified.



**DEFAULT APPEAL CODE** – A default **Appeal** Code MUST be selected. Is the code to which the Transaction will be assigned unless otherwise specified.



## Response Settings

**Response settings** determine if a Transaction will receive a Conditional or Triggered response when Imported. For EACH of the dropdowns below, the users would choose from the values IF they did NOT check the **Process Conditional Responses** toggle at the top of the screen.

In MOST scenarios, users would want the **Process Conditional Responses** toggle selected so as to leverage the Appeal Acknowledgement ability to set up Conditional Acknowledgements.

The Trigger Responses during Import would force users to...

- ALL -- All Donors Generic Letter (ACK)
- BSDN -- Donation of \$250 or Less (ACK)
- BSPL -- Pledge of \$250 or Less (ACK)
- CHR1 -- Christmas Letter 1: \$99.99 or Less (ACK)
- CHR2 -- Christmas Letter 2: \$100 or More (ACK)
- CHR3 -- Christmas Letter 3: Gala Tix (ACK)
- EAS1 -- Easter Letter 1: \$99.99 or Less (ACK)
- EAS2 -- Easter Letter 2: \$100 or More (ACK)
- MAJACT -- Major Activity 5K or Plus
- MDLR -- Major Donor Lifetime Donations of \$250 or More (ACK)
- MDLR\_CHRS -- Christmas Major Donor: Lifetime Donations of \$250 or More (ACK)
- MDPL -- Pledge of \$5000 or More (ACK)
- MDPL\_CHRS -- Christmas Pledge of \$5000 or More (ACK)
- MDSO -- Donation of \$5000 or More (ACK)
- MDSO\_CHRS -- Christmas Donation of \$5000 or More (ACK)
- TNPL -- Donations of \$10 or More (ACK)



## Product, Gift, & Pledge Settings

**Product, Gift, & Pledge** settings enable users to determine how the Import (and CRM) will manage Orders for Products.

The screenshot shows the 'Product, Gift & Pledge Settings' configuration page. At the top, there is a teal header with a dropdown arrow and a help icon. Below the header, the 'Warehouse Name' dropdown menu is highlighted with a red rectangular box and shows 'Main -- Main'. Underneath, there are three toggle switches, each with a blue circle and a label: 'Create Products if They Don't Exist', 'Product SKUs May Act as Gifts', and 'Line Item Types May Act as Gift Types'. To the right of the second and third toggles are text input fields labeled 'Comma-Delimited List of Gift SKUs' and 'Comma-Delimited List of Auto Pledge Programs' respectively.

**Warehouse Name** – A Warehouse MUST be selected from the dropdown in order for Transactions for Product Orders to be imported. NOT Often.

**Create Products if They Don't Exist** – Will create imported Products if they do not already exist in CRM. NOT Often.

**Product SKUs May Act as Gifts** – Enables Product SKUs to act as Gifts when imported. NOT Often.

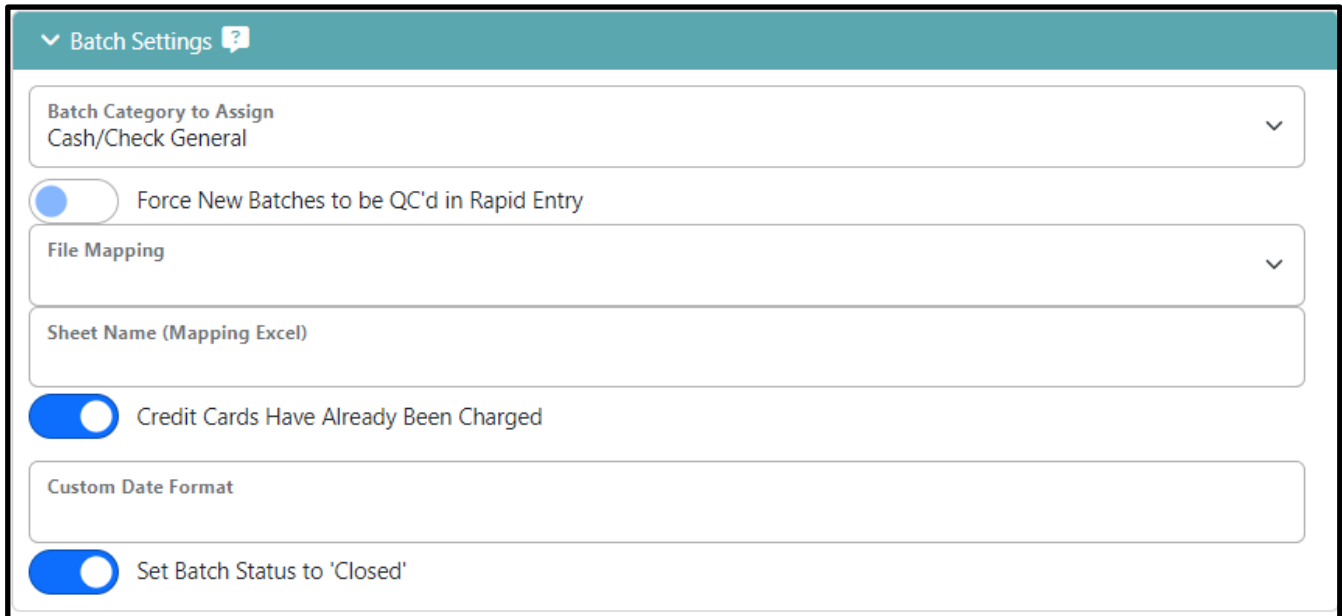
**Line-Item Types May Act as Gift Types** – Enables Line-Item Types to act as Gift Types when imported. NOT Often.

**Comma-Delimited List of Gift SKUs** – ? NOT Often.

**Comma-Delimited List of Auto Pledge Programs** – ? NOT Often.

## Batch Settings

**Batch** settings enable users to pre-set Batch information and utilize File Mapping.



**Batch Category to Assign** – Would automatically assign Batch Transactions to the selected Category. Often.

**Force New Batches to be QC'd in Rapid Entry** – Would force Rapid Entry operator to perform Quality Control on ALL new Batches. NOT Often.

**File Mapping** – Enables users to leverage the File Mapping feature for automatic mapping of Excel or CSV imports to the CRM fields. Often.

**Sheet Name (Mapping Excel)** – IF users are using File Mapping with Excel (and NOT CSV), the designated Sheet that will be imported.

**Credit Cards Have Already Been Charged** – Toggled on would indicate the Donor's Card has already been charged for Transaction and should NOT be charged in the CRM once imported. Often.

### **Custom Date Format -**

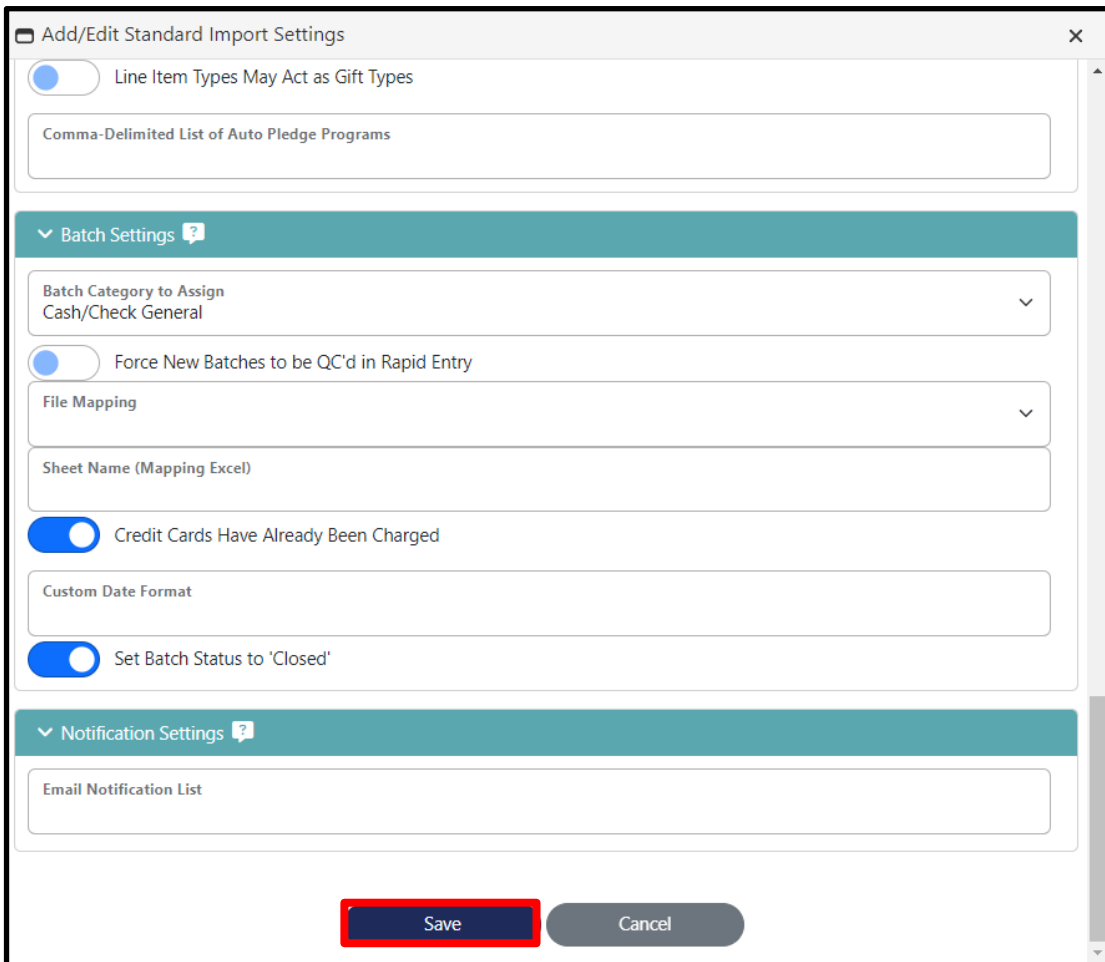
**Set Batch Status to 'Closed'** – Would Close the Batch so visible and able to be processed in the CRM. Often.

**Notification** settings enable user to enter any email address that should be notified of Import status. If multiple Emails notified, Email addresses must be separated by a semi-colon. Data\_Exchange\_Notifications@Aegispremiersolutions.com will always be notified.



The screenshot shows a settings panel with a teal header labeled "Notification Settings" with a help icon. Below the header is a text input field labeled "Email Notification List".

6. Click on the **Save** button at the bottom of the **Import Settings**.



The screenshot shows a dialog box titled "Add/Edit Standard Import Settings" with a close button (X) in the top right corner. The dialog contains several sections:

- A toggle switch for "Line Item Types May Act as Gift Types" (disabled).
- A text input field for "Comma-Delimited List of Auto Pledge Programs".
- A teal header for "Batch Settings" with a help icon.
- A dropdown menu for "Batch Category to Assign" (selected: "Cash/Check General").
- A toggle switch for "Force New Batches to be QC'd in Rapid Entry" (disabled).
- A dropdown menu for "File Mapping".
- A text input field for "Sheet Name (Mapping Excel)".
- A toggle switch for "Credit Cards Have Already Been Charged" (enabled).
- A text input field for "Custom Date Format".
- A toggle switch for "Set Batch Status to 'Closed'" (enabled).
- A teal header for "Notification Settings" with a help icon.
- A text input field for "Email Notification List".

At the bottom of the dialog, there are two buttons: "Save" (highlighted with a red box) and "Cancel".

7. Users are taken to the **Edit Schedule** page.

- Users can schedule the Import to run one time or over a selected period in iterations if desired.

**Job Description** – Will display under the Standard Import page as the Description of this Import. Should contain a brief summary of the Import purpose.

**Start Date/Time of Day** – enables users to select a Date/Time on which to start Import. This can be done for Future dates as desired.

**Radio buttons:** Once, Every “n” Hours, Every “n” Days, Weekly, Monthly – enable users to choose the frequency at which they want the Import to run.

- If **Hours** or **Days** option chosen then **Increment** field completed.
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

**Email Notifications** – Fellow users Import creator directs to receive notifications about import; can click/use arrows to move from **Available** to **Selected**.

**Additional Addresses** – Additional email addresses to receive notifications.

8. Click on **Schedule Task**.

9. Users can now view the Job as scheduled to **Run on the 6<sup>th</sup> Day of every month** under the **Current Jobs** section of the **Standard Import Home** screen.

The screenshot shows the 'Standard Import Home' interface. At the top, there are tabs for 'Standard Import' and 'Custom Import'. Below this is a 'New Import Job' section with a dropdown menu to 'Select the Type of Import' and a 'Create New Import' button. A 'Refresh All Lists' button is also present. The main section is titled 'Current Jobs' and contains a table with the following data:

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Edit	Job
Transaction Import	Transaction - TRAINING	Dave O'Connell	Run every hour.	05/07/2024 1:00:01 PM	05/07/2024 2:00:00 PM	05/07/2024 8:18:12 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Transaction Import	Transaction Import - Sales	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	01/24/2024 12:25:13 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Solicitation Import	Solicitations - TRAINING	Dave O'Connell	Run every hour.	05/07/2024 1:00:01 PM	05/07/2024 2:00:00 PM	05/07/2024 8:22:37 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>

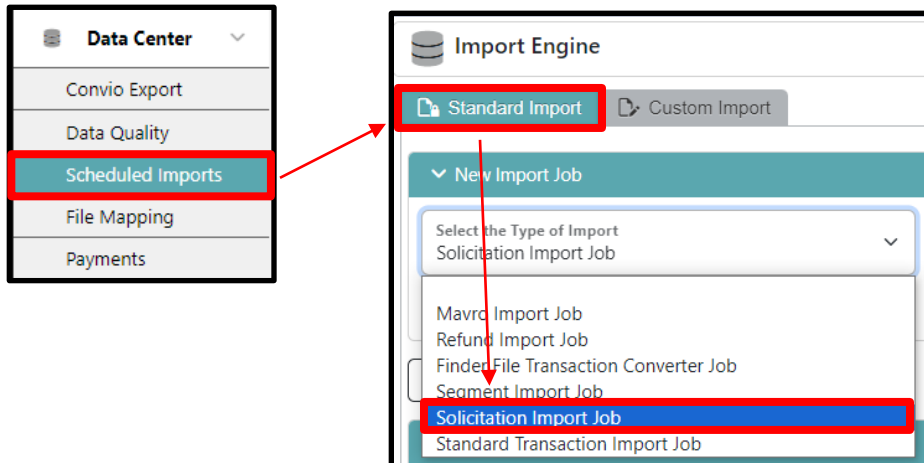
10. Users can also navigate to the **Donors Module, Locate Transaction** sub-module and search by the Import Dates to display the imported transactions.

The screenshot shows the 'Donors Module, Locate Transaction' sub-module. It features a table with the following columns: Activity Type, Donor ID, Name, Invoice #, Batch, Activity Date, Appeal Name, and Operator. The table is paginated, showing page 1 of 1 with 20 items. A red box highlights the following rows:

Activity Type	Donor ID	Name	Invoice #	Batch	Activity Date	Appeal Name	Operator
Order	<a href="#">40003274</a>	Alfonso Aleena	745239	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Order	<a href="#">40002300</a>	Raul Christian	745238	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Order	<a href="#">40406169</a>	Iliana Jude	745237	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Transaction - TRAINING	<a href="#">40085976</a>	Malia & Matthew Jovan	745236	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Transaction - TRAINING	<a href="#">40010779</a>	Haylee & Sharon Dorian	745235	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Transaction - TRAINING	<a href="#">40012799</a>	Skylar Bennett	745234	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Transaction - TRAINING	<a href="#">40464894</a>	Ernest Karl	745233	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Transaction - TRAINING	<a href="#">40007064</a>	Cara Kellen	745232	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Contribution	<a href="#">40676125</a>	Otis Campbell	745231	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Contribution	<a href="#">40676123</a>	Goober Pyle	745230	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Contribution	<a href="#">40676121</a>	Helen Crump	745229	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Contribution	<a href="#">40676120</a>	Barney Fife	745228	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports
Contribution	<a href="#">40676118</a>	Andy Taylor	745227	11728	05/05/2024	2024 Summer (SOL)	Aegis CRM Imports

## Solicitation Imports

Solicitation Imports are found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Standard Import** tab.



**Solicitation Imports** enable users to import all the details of an Appeal Campaign created OUTSIDE of the Aegis CRM. This import would build all relevant records: Donors, Appeals, Transactions, Batches, etc. in the CRM.

### **Solicitation Import STEPS**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Standard Import Tab**.
3. From **Select the Type of Import** - choose **Solicitation Import Job**.

4. Click on the **Create New Import** button.

The screenshot shows a web form titled "Import Type Solicitation Import". It is divided into several sections, each with a teal header and a dropdown arrow:

- FTP Settings**: Contains fields for "FTP Site", "FTP Port", "FTP Protocol" (set to "SSH (SFTP)"), "Username" (set to "Transaction Import - TRAIN"), "Password" (masked with dots), "Remote Directory", "Delete Remote Files" (checked), and "PGP" (checked).
- Donor Settings**: Contains two toggle switches: "Verify Prefix and Suffix Against NameWords Table" (checked) and "Enforce Title-Casing for New Donor Name Elements" (checked).
- Pull Settings**: Contains two toggle switches: "Save Appeal Pull in a Pending State" (checked) and "Save New Appeals as Inactive" (checked).
- Notification Settings**: Contains a text field for "Email Notification List".

At the bottom of the form are two buttons: "Save" (dark blue) and "Cancel" (grey).

5. Users should review each of the Import Setting sections on the following pages for a **Standard Transaction Import**.

- The most common fields are highlighted & used in the screen examples.

### **Import Type**

**Import Type** is where user should provide a unique name by which they will recognize the Job.

The screenshot shows a single text input field with a light grey background and a dark border. The text inside the field reads "Import Type Solicitation Import".

## FTP Settings

**FTP Settings** controls the interactions with the FTP Site to which clients can securely upload and post Import files. Once the Site is initially set up for the scheduled import, the user will not need to enter it again.

To use the FTP Settings, users will need to first get **FTP access** from the **Support** group. Directions on obtaining that access and how to set up the FTP site and upload files are located on **Pages 25-30** of this manual.

The screenshot shows the 'FTP Settings' configuration page. It features a teal header with a dropdown arrow and a help icon. Below the header are several input fields and controls:
 

- FTP Site:** A text box containing 'ftp1.bernardsolutions.com'.
- FTP Port:** A text box containing '22'.
- FTP Protocol:** A dropdown menu currently set to 'SSH (SFTP)'.
- Username:** A text box containing 'doconnell@wearemoore.com'.
- Password:** A text box with masked characters '.....'.
- Remote Directory:** A text box containing '/solicitations'.
- Delete Remote Files:** A toggle switch that is currently turned on (blue).
- PGP:** A toggle switch that is currently turned on (blue).

**FTP Site** – This is the actual site address for the Aegis CRM FTP site and should always contain: **ftp1.bernardsolutions.com**

**FTP Port** – This is the SECURE port address for the Aegis CRM FTP site and should always contain **22**.

- Users will get an error if attempting to use an unsecure port – 21 or if the Port is left blank.
- Clients can work with Support to set up different ports with strict security guidelines if desired.

**FTP Protocol = SSH (SFTP)**

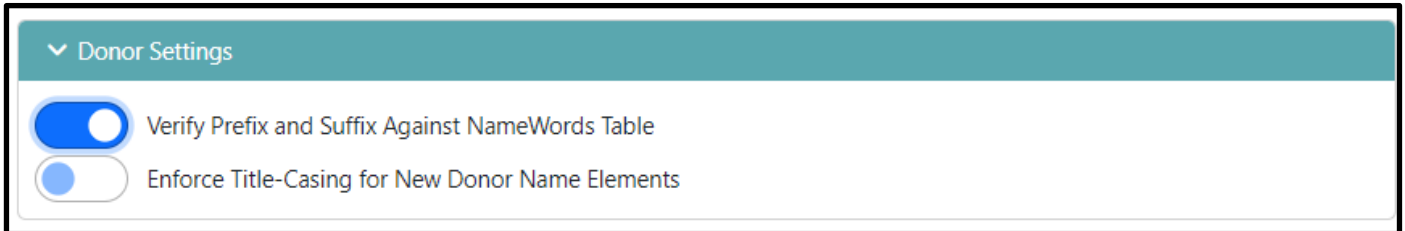
**Remote Directory** – Equals the name of the FTP folder AND sub-folder (if one exists) where the file to import is located.

- Ensure that there is a leading slash and one in between any folders – NO Spaces in name – see examples below:
  - One Folder: **/Solicitations**
  - Two Folders: **/TrainingSales/Solicitations**



## Donor Settings

Donor settings controls how **Donors** (Partners/Constituents) records are examined as they are imported into the system.

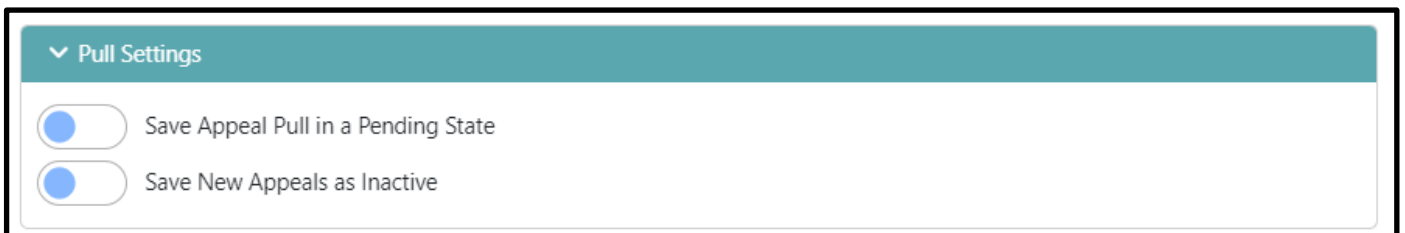


**Verify Prefix and Suffix Against NameWords Table** – Runs a check against the Prefix and Suffix NameWords Table under the Administration module. Does NOT error if found unmatched but will display results of mismatch in appended Summary File that lists unmatched values. Often.

**Enforce Title-Casing for New Donor Name Elements** – For future use of enforcing proper casing, not in use.

## Pull Settings

Pull settings control how Pulls are imported into the system and associated with the generated Appeal.

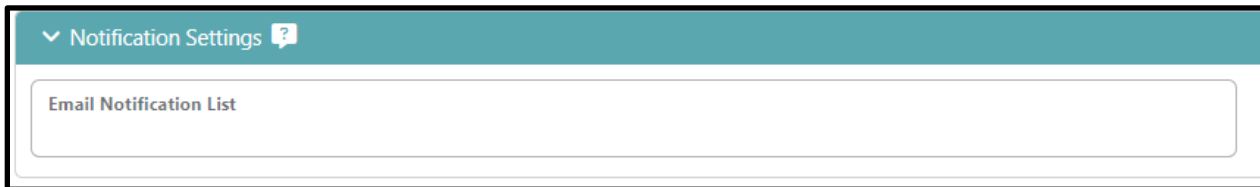


**Save Appeal Pull in a Pending State** – Ensures Pull is not Active until the user Finalizes in system.

**Save New Appeals as Inactive** – Ensures Pull is not Active until the user Finalizes in system.

## Notification Settings

**Notification** settings enable user to enter any email address that should be notified of Import status. If multiple Emails notified, Email addresses must be separated by a semi-colon. Data\_Exchange\_Notifications@Aegispremiersolutions.com will always be notified.



Notification Settings ?

Email Notification List

11. Click on the **Save** button at the bottom of the **Import Settings**.

12. Users are taken to the **Edit Schedule** page.

- Users can schedule the Import to run one time or over a selected period in iterations if desired.

**Job Description** – Will display under the Standard Import page as the Description of this Import. Should contain a brief summary of the Import purpose.

**Start Date/Time of Day** – enables users to select a Date/Time on which to start Import. This can be done for Future dates as desired.

**Radio buttons:** Once, Every “n” Hours, Every “n” Days, Weekly, Monthly – enable users to choose the frequency at which they want the Import to run.

- If **Hours** or **Days** option chosen then **Increment** field completed.
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

**Email Notifications** – Fellow users Import creator directs to receive notifications about import; can click/use arrows to move from **Available** to **Selected**.

**Additional Addresses** – Additional email addresses to receive notifications.

13. Click on **Schedule Task**.

14. Users can now view the Job as scheduled to **Run every hour** under the **Current Jobs** section of the **Standard Import Home** screen.

The screenshot shows the 'Import Engine' interface. At the top, there are tabs for 'Standard Import' and 'Custom Import'. Below this is a 'New Import Job' section with a dropdown menu for 'Select the Type of Import' and a 'Create New Import' button. A 'Refresh All Lists' button is also present. The main section is titled 'Current Jobs' and contains a table with the following data:

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Edit	Job
Solicitation Import	Solicitations - TRAINING	Dave O'Connell	Run every hour.	05/07/2024 1:00:01 PM	05/07/2024 2:00:00 PM	05/07/2024 8:22:37 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Transaction Import	Transaction Import - TRAIN	Dave O'Connell	Run every hour.	05/06/2024 9:00:00 AM	05/06/2024 10:00:00 AM	05/06/2024 7:14:04 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Solicitation Import	Solicitation Import - Laurice	Laurice Wall	Run on the 1st day of Jan.	Not yet run	01/01/2025 12:16:00 PM	04/25/2024 12:16:50 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Transaction Import	Transaction Import - TRN	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	12/18/2023 12:26:27 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>

15. Users can also navigate to the **Appeals** module – **Locate Appeal** sub-module and view results.

The screenshot shows the 'Appeals' module interface. At the top, there are navigation arrows, a page number '1', and a 'Page size: 20' dropdown. The table contains the following data:

Appeal ID	Appeal Name	Mail Date	Date First Return	Date Last Return	Qty Mailed	# Responses	Revenue	Cost	Net	Appeal Type	Active	Reports
<a href="#">26_PROS</a>	26 Prospects and Home List Mailing	05/25/2024			1,000	0	\$0.00	\$0.00	\$0.00	BULK	<input checked="" type="checkbox"/>	<a href="#">P</a> <a href="#">E</a>
<a href="#">24_8ST</a>	2024 Sustainer Continuous (SOL)	01/01/2024	01/05/2024	05/05/2024	0	60	\$15,648.00	\$0.00	\$15,648.00	BULK	<input checked="" type="checkbox"/>	<a href="#">P</a> <a href="#">E</a>
<a href="#">24_3SM</a>	2024 Summer (SOL)	01/01/2024	02/27/2024	05/07/2024	2,678	45	\$1,656.91	\$482.04	\$1,174.87	BULK	<input checked="" type="checkbox"/>	<a href="#">P</a> <a href="#">E</a>
<a href="#">24_5GT</a>	2024 Giving Tuesday (SOL)	01/01/2024			2,678	0	\$0.00	\$482.04	(\$482.04)	BULK	<input checked="" type="checkbox"/>	<a href="#">P</a> <a href="#">E</a>
<a href="#">24_2ES</a>	2024 Easter (SOL)	01/01/2024	02/29/2024	04/28/2024	2,678	966	\$40,479.02	\$3,274.28	\$37,204.74	BULK	<input checked="" type="checkbox"/>	<a href="#">P</a> <a href="#">E</a>

16. As well as drill into the **Appeal** and view the generated **Pull**.

Appeal Pull: 26 Prospects and Home List Mailing - 26\_PROS

Save and Close New Segment(s) QC Report (CSV) QC Report

**Global Attributes** 500/1,000  
Select this node to define the global inclusions and exclusions for this pull

**Prospect** Invalidated/Invalidated  
Default Exclusion for Prospects

**No Direct Mail** Invalidated/Invalidated  
Default Exclusion for No Direct Mail

**Undeliverable Address** Invalidated/Invalidated  
Default Exclusion for Undeliverable Addresses

**Blank Address** Invalidated/Invalidated  
Default Exclusion for Missing Address Data

**150** 0/0  
\*\*Created by Aegis CRM Imports. Please Update\*\*

**150** 500/500  
Prospects

**250** 0/0  
\*\*Created by Aegis CRM Imports. Please Update\*\*

**250** 500/500  
Home List

**Global Attributes**

Mail Date  
05/25/2024

Channel  
Direct Mail

**Counts Last Updated:** 05/07/2024 9:00:36 AM

Initial Selection Count  
500

Package  
26\_PROS - \*\*Created by A...

Ask Array

Segment Grouping

Default Fund

**Injected Count:** 0

**Total Selection Count:** 500

**Final Solicited Count:** 1,000

**Unsegmented Count:** -500 Sample...

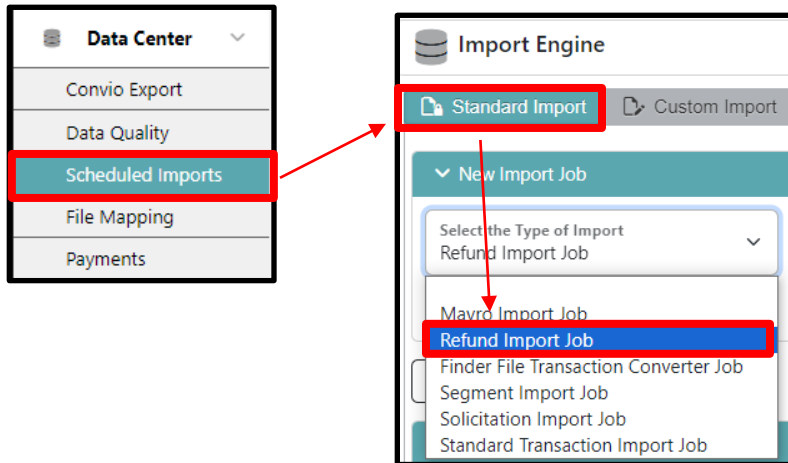
> Root Segments
[Modify Segments](#)

> Outputs
[Copy Output Fields](#)

> Criteria

## Refund Imports

Refund Imports are found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Standard Import** tab.



**Refund Imports** are for the issuing of refunds to clients because of a situation requiring a large group of donors to be refunded their money; the cancellation a scheduled event with registrations paid, termination of benefits with promised reimbursement, etc.

### **Refund Import STEPS**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Standard Import Tab**.
3. From **Select the Type of Import** dropdown- choose **Refund Import Job**.

4. Click on the **Create New Import** button.

**Add/Edit Standard Import Settings**

Import Type  
Refund Import

**FTP Settings**

FTP Site      FTP Port      FTP Protocol  
SSH (SFTP)

Username  
doconnell@wearemoore.com      Password  
.....

Remote Directory       Delete Remote Files       PGP

**Batch Settings**

Batch Category to Assign

**Notification Settings**

Email Notification List

Save      Cancel

### Import Type

**Import Type** is where user should provide a unique name by which they will recognize the Job.

Import Type  
Refund Import

## FTP Settings

**FTP Settings** controls the interactions with the FTP Site to which clients can securely upload and post Import files. Once the Site is initially set up for the scheduled import, the user will not need to enter it again.

To use the FTP Settings, users will need to first get **FTP access** from the **Support** group. Directions on obtaining that access and how to set up the FTP site and upload files are located on **Pages 25-30** of this manual.

The screenshot shows the 'FTP Settings' configuration panel. It contains the following fields and controls:

- FTP Site:** ftp1.bernardsolutions.com
- FTP Port:** 22
- FTP Protocol:** SSH (SFTP)
- Username:** doconnell@wearemoore.com
- Password:** Masked with dots
- Remote Directory:** /TrainingSales/Refunds
- Delete Remote Files:** Toggled ON
- PGP:** Toggled ON

**FTP Site** – This is the actual site address for the Aegis CRM FTP site and should always contain: **ftp1.bernardsolutions.com**

**FTP Port** – This is the SECURE port address for the Aegis CRM FTP site and should always contain **22**.

- Users will get an error if attempting to use an unsecure port – 21 or if the Port is left blank.
- Clients can work with Support to set up different ports with strict security guidelines if desired.

**FTP Protocol = SSH (SFTP)**

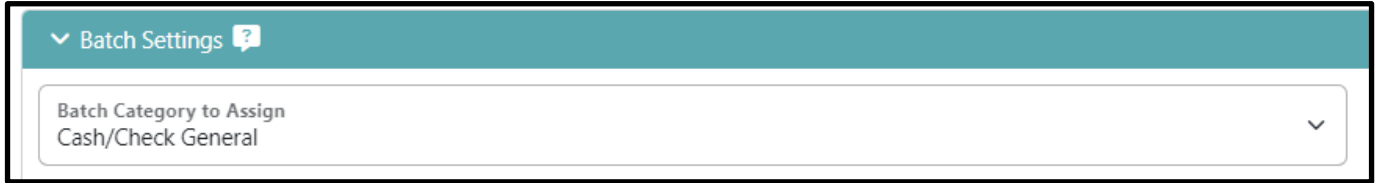
**Remote Directory** – Equals the name of the FTP folder AND sub-folder (if one exists) where the file to import is located.

- Ensure that there is a leading slash and one in between any folders – NO Spaces in name – see examples below:
  - One Folder: **/Refunds**
  - Two Folders: **/TrainingSales/Refunds**



## **Batch Settings**

**Batch** settings enable users to pre-set Batch information and utilize File Mapping.

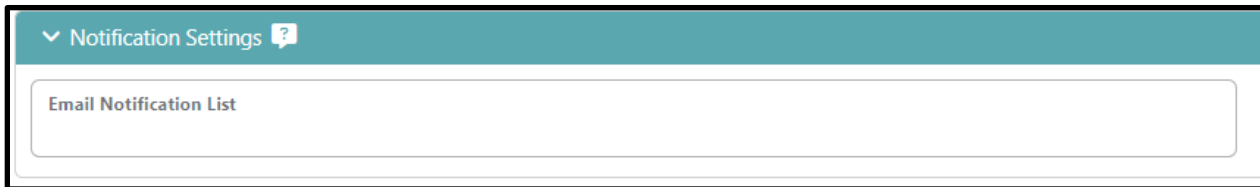


A screenshot of a software interface showing a dropdown menu for 'Batch Settings'. The menu is open, displaying the text 'Batch Category to Assign' and 'Cash/Check General' with a downward arrow on the right side.

**Batch Category to Assign** – Would automatically assign Batch Transactions to the selected Category.

## **Notification Settings**

**Notification** settings enable user to enter any email address that should be notified of Import status. If multiple Emails notified, Email addresses must be separated by a semi-colon. Data\_Exchange\_Notifications@Aegispremiersolutions.com will always be notified.



A screenshot of a software interface showing a text input field for 'Notification Settings'. The field is labeled 'Email Notification List' and is currently empty.

5. Click on the **Save** button at the bottom of the **Import Settings**.

6. Users are taken to the **Edit Schedule** page.

Users can schedule the Import to run one time or over a selected period in iterations if desired.

**Job Description** – Will display under the Standard Import page as the Description of this Import. Should contain a brief summary of the Import purpose.

**Start Date/Time of Day** – enables users to select a Date/Time on which to start Import. This can be done for Future dates as desired.

**Radio buttons:** Once, Every “n” Hours, Every “n” Days, Weekly, Monthly – enable users to choose the frequency at which they want the Import to run.

- If **Hours** or **Days** option chosen then **Increment** field completed.
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

**Email Notifications** – Fellow users Import creator directs to receive notifications about import; can click/use arrows to move from **Available** to **Selected**.

**Additional Addresses** – Additional email addresses to receive notifications.

7. Click on **Schedule Task**.

Users can now view the Job as scheduled to **Run every hour** under the **Current Jobs** section of the **Standard Import Home** screen.

**Import Engine**

Standard Import
Custom Import

▼ New Import Job

Select the Type of Import
Refund Import Job
▼

Create New Import

Refresh All Lists

Current Jobs

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Edit	Job
Refund Import	Refunds Import - TRAIN	Dave O'Connell	Run every hour	Not yet run	05/06/2024 1:29:02 PM	05/06/2024 12:29:02 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Solicitation Import	Solicitation Import - TRAIN	Dave O'Connell	Run every hour	05/06/2024 12:07:00 PM	05/06/2024 1:07:00 PM	05/06/2024 9:07:00 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Transaction Import	Transaction Import - TRAIN	Dave O'Connell	Run every hour.	05/06/2024 12:00:00 PM	05/06/2024 1:00:00 PM	05/06/2024 7:14:04 AM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Solicitation Import	Solicitation Import - Laurice	Laurice Wall	Run on the 1st day of Jan.	Not yet run	01/01/2025 12:16:00 PM	04/25/2024 12:16:50 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>
Transaction Import	Transaction Import - TRN	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	12/18/2023 12:26:27 PM	<a href="#">Settings</a> <a href="#">Schedule</a>	<a href="#">Clone</a> <a href="#">Deactivate</a>

## Custom Import Jobs LANDING PAGE

Custom Import Jobs are found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Custom Import** tab.

**Current Jobs** enables users to view the jobs that are still in process or on schedule to occur or continuously run. Users can also Run Now or Deactivate if necessary.

**Custom Import History** enables users to view past jobs and their summary information. Users can also run the Error Report from the link at the end of the report. There is no editing available.

**Import Engine**

Standard Import | Custom Import

▼ New Import Job

Select the Type of Import

File Source  
 Upload a single file  Post files to an FTP site

Select File

Next Step >

Refresh All Lists

**Current Jobs**

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Run Now	Deactivate
No records to display.								

**Custom Import History**

Import Type	Description	Status	User Name	Date Completed	Records Read	Records Processed	Dropped Records	Errors Found	
Inventory Adjustment	Inventory Adjustment Job	Completed	Dave O'Connell	05/06/2024 1:12:40 PM	2	2	0	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Dave O'Connell	05/06/2024 11:52:58 AM	50	50	0	0	No Error Report
New Name Import	New Name Import Job	Completed	Dave O'Connell	05/06/2024 11:20:54 AM	129	129	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 11:49:09 AM	50	50	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 10:03:48 AM	50	50	50	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	<a href="#">Error Report</a>

## **Current Jobs OVERVIEW**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Custom Import Tab**.
3. Observe the top, **Current Job** section – all current jobs are displayed here.
  - In this example a recurring Transaction Import job is displayed complete with columns:
    - Job Type
    - Description
    - Created By
    - Schedule
    - Last Run Time
    - Next Run Time
    - Date Created
    - Run Now
    - Deactivate
  - Many times, a Custom Import can be processed very quickly and often jumps directly into the Custom Import History and skips the Current Jobs section.

Current Jobs								
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Run Now	Deactivate
No records to display.								

## Custom Import History OVERVIEW

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Custom Import Tab**.
3. Observe the second section – **Custom Import History** – all past, completed jobs are displayed here.
  - In this example a recurring Transaction Import job is displayed complete with columns:
    - Import Type
    - Description
    - Status
    - User Name
    - Date Completed
    - Records Read
    - Records Processed
    - Errors Found
    - Dropped Records
    - Errors Found
    - Error Report

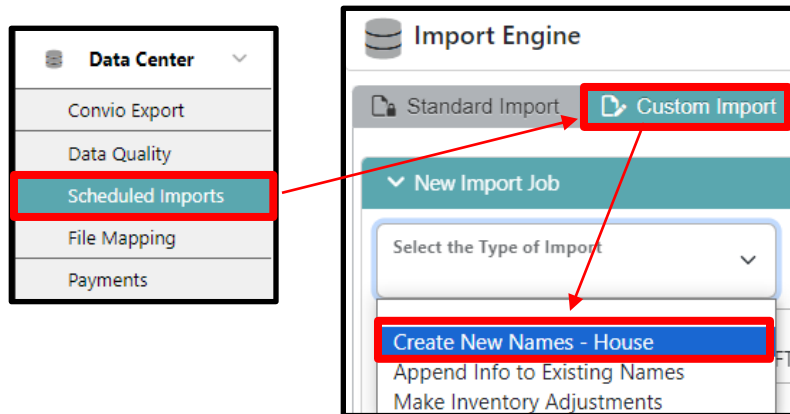
Import Type	Description	Status	User Name	Date Completed	Records Read	Records Processed	Dropped Records	Errors Found	
New Name Import	New Name Import Job	Completed	Dave O'Connell	05/06/2024 11:20:54 AM	129	129	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 11:49:09 AM	50	50	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 10:03:48 AM	50	50	50	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	<a href="#">Error Report</a>

4. Clicking on an **Error Report** link will send an Excel file summary to the downloadable area of the browser. Users can then click or download that file to read the results. BELOW is an example of an Error Report re: missing Donor Names or Company from an attempted New Names import.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Message	Title	Firstname	Middlename	Lastname	Spouse	Address	Address2	City	State	Zip	Phone	Phone_2	Email		
2	The new Donor must have a Name or Company.	Jo Ann		Martinez			8400 Rumbley Rd		Summerfi	NC	27358-971	555-333-1212		ab697176@demo-data.com		
3	The new Donor must have a Name or Company.	Gladys	A.	Ghegan			15000 Coastal Bay Ci		Naples	FL	34119-779	555-333-1213		aghegan@demo-data.com		
4	The new Donor must have a Name or Company.	Alicemarie		Lesch			5365 Big Bass Dr		Raleigh	NC	27610-539	555-333-1214		alicemarie1034@demo-data.com		
5	The new Donor must have a Name or Company.	Ana	M.	Napoles-Ruiz			200 Ross Rd Apt K244		King of Pri	PA	19406-218	555-333-1215		anapoles57@demo-data.com		

## Create New Names - House

Custom importing a list of names is found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Custom Import** tab.



**Creating New Names - House** imports are for the importing of a list of names that they have gathered or received from a third-party source that they want to import as Donors or Prospects into the Aegis CRM.

### **Importing a List of Names STEPS**

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Custom Import** Tab.
3. From **Select the Type of Import** dropdown - choose **Create New Names - House**.

4. The **Create New Names – House Details** sections displays.

The screenshot shows a 'New Import Job' form with the following fields:

- Select the Type of Import:** Create New Names - House
- Select the Batch Appeal:** 24\_2ES - 2024 Easter (SOL) (with a help icon)
- Select the Default Origin Source:** 24SM - 2024 Summer Appea (with a help icon)
- Select the Batch Fund:** 11000-000-000 - General - N (with a help icon)
- Process Conditional Responses:** Yes (with a help icon)
- Select the Batch Channel:** Direct Mail
- Select the Batch Save State:** Pending
- Select the Batch Category:** Cash/Check General
- Select the Product Warehouse:** Main - Main (with a help icon)
- File Source:**  Upload a single file  Post files to an FTP site (with a help icon)

Buttons at the bottom: **Select File** and **Next Step >**

**Select the Batch Appeal (REQUIRED)** – If the input record does NOT have an Appeal value, or the Appeal indicated cannot be found in the Aegis CRM, this Appeal will automatically be assigned to the new record. Users can adjust these values through Rapid Entry after the import is complete.

**Select the Default Origin Source (REQUIRED)** – If the input record does NOT have an Origin value, or the Origin indicated cannot be found in the Aegis CRM, this Origin will automatically be assigned to the new record. Users can adjust these values through Rapid Entry after the import is complete.

**Select the Batch Fund** – If the input record does NOT have a Fund value, or the Fund indicated cannot be found in the Aegis CRM, this Fund will automatically be assigned to the new record. Users can adjust these values through Rapid Entry after the import is complete.

**Process Conditional Responses** – Selecting Yes means that any appeal provided in the data file which has conditional acknowledgements configured will cause those Acks to be triggered automatically once the batch is saved and closed. Select No to suppress all Acknowledgments.

**Select the Batch Channel** – (REQUIRED) Select the Channel to which to associate the import.

**Select the Batch Save State** – Select the Batch saved in a Pending or Closed status.

**Select the Batch Category** – Users can select the Batch Category to which they would like to associate the import.

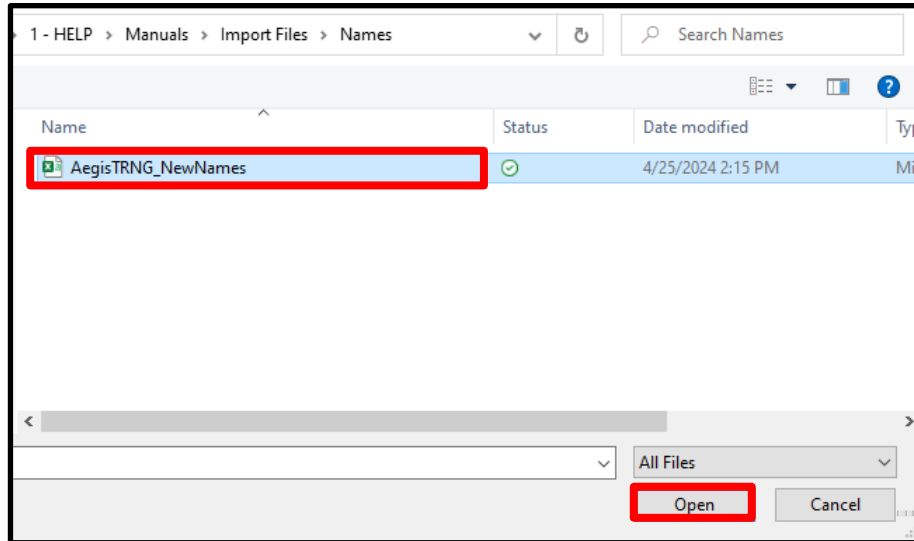
**Select the Product Warehouse** – Leave blank: NOT required for New Name Import.



**File Source** – Whenever a New Names file is imported, the **Upload a single file** radio button should be selected.

5. Click on the **Select File** button.

6. Browse to the desired **File** and click **Open** to upload.



7. Click the **Next Step>** button.

8. The **File Mappings** screen displays. Users must map the:

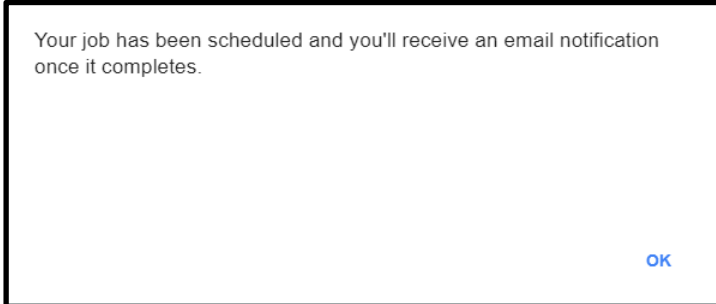
- 1 **Destination:** Excel or CSV Import File Fields
- to the
- 2 **Field ID:** Aegis CRM Field Names
- via the
- 3 **Field Type:** Type of field utilized - Text, Flag, Note, etc.

Source	Ignore All Fields	Field Type	Field ID
<b>Destination</b>	<input type="checkbox"/>		
Title	<input type="checkbox"/> Ignore	Text	Title
Firstname	<input type="checkbox"/> Ignore	Text	First Name
Middlename	<input type="checkbox"/> Ignore	Text	Middle Name
Lastname	<input type="checkbox"/> Ignore	Text	Last Name
Spouse	<input type="checkbox"/> Ignore	Text	Spouse First Name
Address	<input type="checkbox"/> Ignore	Text	Address Line 1
Address2	<input type="checkbox"/> Ignore	Text	Address Line 2
City	<input type="checkbox"/> Ignore	Text	City
State	<input type="checkbox"/> Ignore	Text	State/Province
Zip	<input type="checkbox"/> Ignore	Text	Postal Code
Phone	<input type="checkbox"/> Ignore	Phone Number	Home
Phone_2	<input checked="" type="checkbox"/> Ignore		
Email	<input type="checkbox"/> Ignore	Text	Email 1

Submit Cancel

9. Click on the **Submit** button at the bottom of the page.

10. Users receive the following **message**:



11. Click **OK**.

12. User is returned to the **Custom Import** page.

13. Click on the **Refresh All Lists** button.

14. If file submitted correctly, under the **Custom Import History** section, users will see **No Error Report** value under the far right column for their file.

[Refresh All Lists](#)

**Current Jobs**

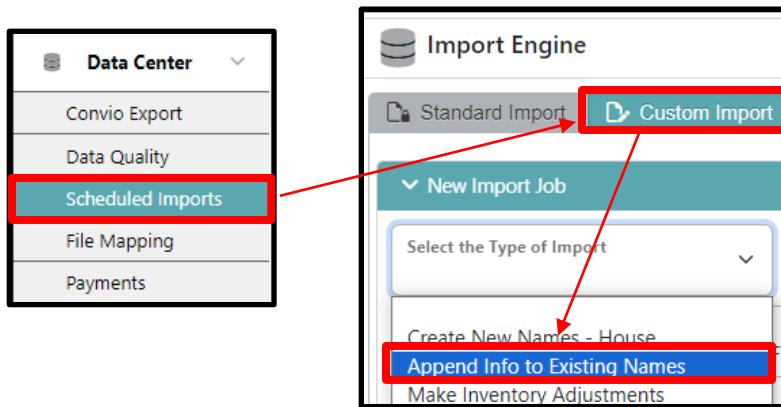
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Run Now	Deactivate
No records to display.								

**Custom Import History**

Import Type	Description	Status	User Name	Date Completed	Records Read	Records Processed	Dropped Records	Errors Found	
New Name Import	New Name Import Job	Completed	Dave O'Connell	05/06/2024 11:20:54 AM	129	129	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 11:49:09 AM	50	50	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 10:03:48 AM	50	50	50	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	<a href="#">Error Report</a>

## Append Info to Existing Names

Importing Info that will Append to a list of names is found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Custom Import** tab.

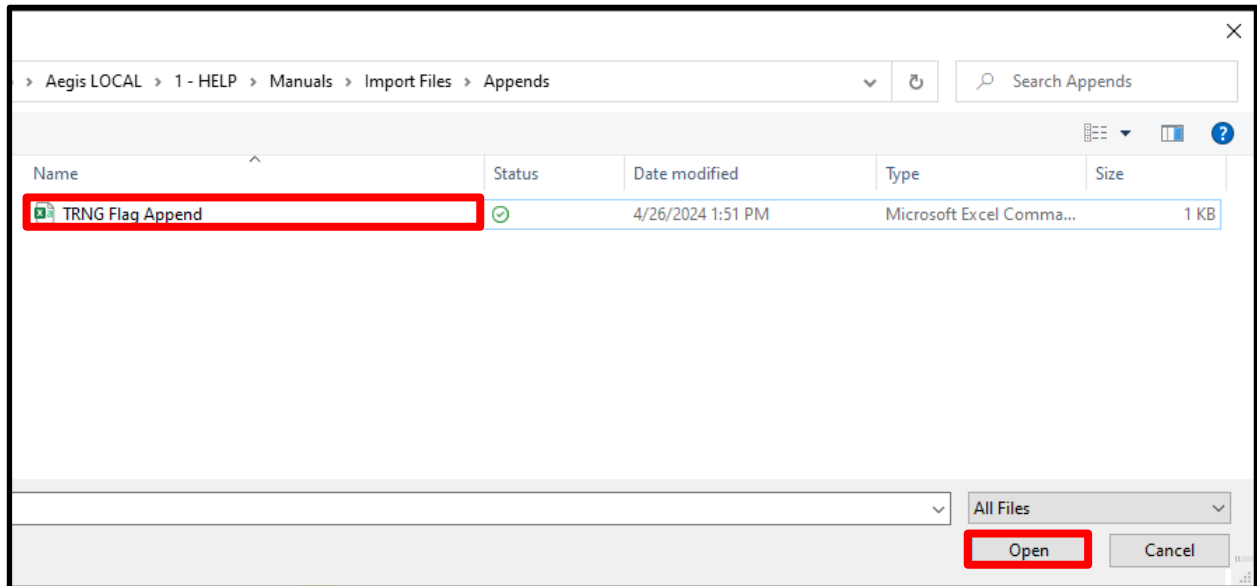


**Append Info to Existing Names** enables users to

### Appending Existing Names STEPS

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Custom Import** Tab.
3. From **Select the Type of Import** dropdown - choose **Append Info to Existing Names**.

4. **File Source** – Click the **Upload a single file** radio button.
5. Click on the **Select File** button.
6. Browse to the desired **File** and click **Open** to upload.



7. Click the **Next Step>** button.

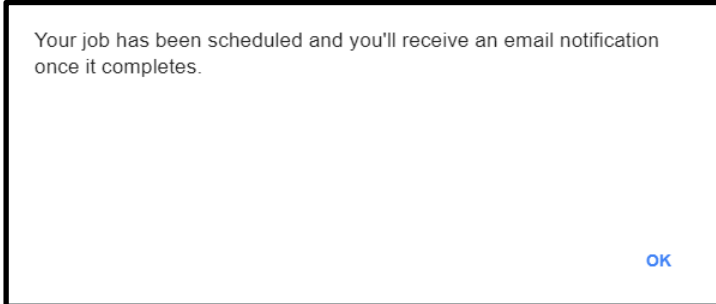
8. The **File Mappings** screen displays. Users must map the:

- 1 **Destination:** Excel or CSV Import File Fields  
to the
- 2 **Field ID:** Aegis CRM Field Names  
via the
- 3 **Field Type:** Type of field utilized - Text, Custom Flag, Donor ID, etc.

The screenshot shows the 'Field Mappings' dialog box. On the left, under 'Source', there are two rows: 'contactid' and 'Newsletter'. The 'contactid' row is highlighted with a red box and a red circle containing the number '1'. To the right of the source list are three toggle switches: 'Ignore All Fields', 'Ignore', and 'Ignore'. The 'Ignore All Fields' and 'Ignore' switches are turned on. In the center, there are two 'Field Type' dropdown menus. The first dropdown is set to 'Donor ID' and is highlighted with a red box and a red circle containing the number '2'. The second dropdown is set to 'Custom Flag'. On the right, there are two 'Field ID' dropdown menus. The first dropdown is set to 'DonorID' and is highlighted with a red box and a red circle containing the number '3'. The second dropdown is set to 'NEWSLTR' and is highlighted with a blue box. At the bottom of the dialog are 'Submit' and 'Cancel' buttons.

15. Click on the **Submit** button at the bottom of the page.

16. Users receive the following **message**:



17. Click **OK**.

18. User is returned to the **Custom Import** page.

19. Click on the **Refresh All Lists** button.

20. If file submitted correctly, under the **Custom Import History** section, users will see **No Error Report** value under the far right column for their file.

↻ Refresh All Lists

Current Jobs

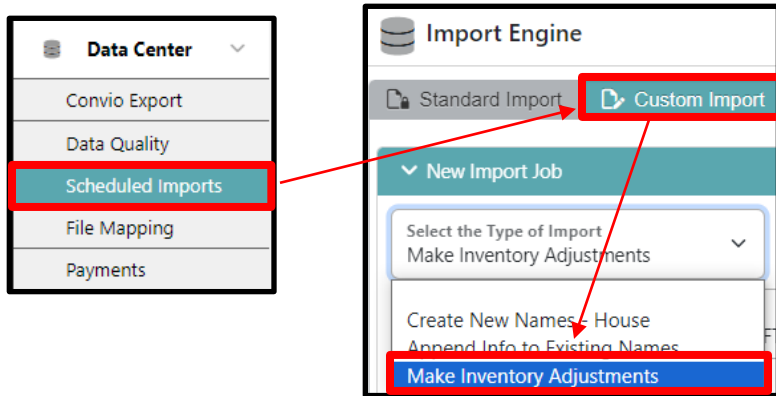
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Run Now	Deactivate
No records to display.								

Custom Import History

Import Type	Description	Status	User Name	Date Completed	Records Read	Records Processed	Dropped Records	Errors Found	
Data Append	Data Append Job	Completed	Dave O'Connell	05/06/2024 11:52:58 AM	50	50	0	0	No Error Report
New Name Import	New Name Import Job	Completed	Dave O'Connell	05/06/2024 11:20:54 AM	129	129	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 11:49:09 AM	50	50	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 10:03:48 AM	50	50	50	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	<a href="#">Error Report</a>

## Make Inventory Adjustments

Making Inventory Adjustments is found under the **Data Center** module, **Scheduled Imports** sub-module, under the **Custom Import** tab.



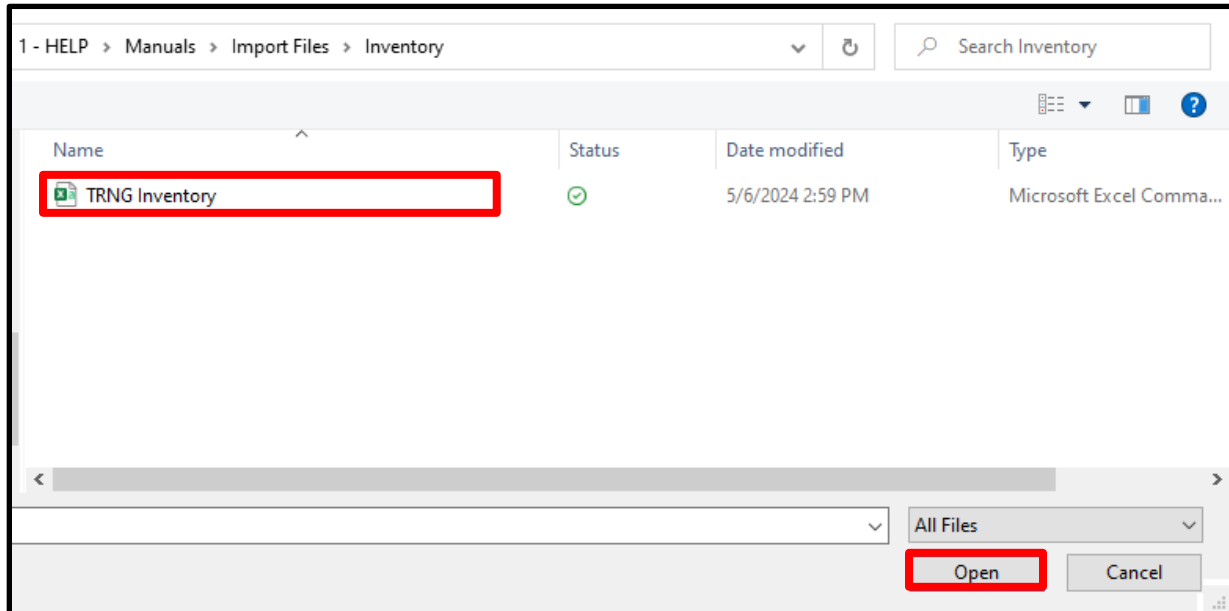
**Make Inventory Adjustments** enables users to

### Inventory Adjustments STEPS

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.
2. Click on the **Custom Import Tab**.
3. From **Select the Type of Import** dropdown - choose **Make Inventory Adjustments**.



4. **File Source** – Click the **Upload a single file** radio button.
5. Click on the **Select File** button.
6. Browse to the desired **File** and click **Open** to upload.



7. Click the **Next Step>** button.

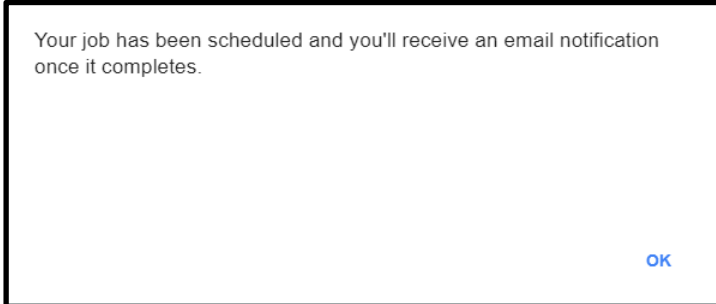
8. The **File Mappings** screen displays. Users must map the:

- 1 Destination:** Excel or CSV Import File Fields  
to the
- 2 Field ID:** Aegis CRM Field Names  
via the
- 3 Field Type:** Type of field utilized - Text, Custom Flag, Donor ID, etc.

The screenshot shows the 'Field Mappings' interface. On the left, under the 'Source' section, the 'Destination' label is highlighted with a red box and a red circle containing the number '1'. Red arrows point from this circle to the 'Product\_SKU', 'Warehouse\_Name', and 'Adjustment\_Amount' source fields. In the center, there are three 'Field Type' dropdown menus, each with a red box around the label and a red circle containing the number '2'. Red arrows point from this circle to the 'Text' selection in each dropdown. On the right, there are three 'Field ID' dropdown menus, each with a red box around the label and a red circle containing the number '3'. Red arrows point from this circle to the 'Product SKU', 'Warehouse Name', and 'Adjustment Amc' selections in each dropdown. At the bottom, there are 'Submit' and 'Cancel' buttons.

9. Click on the **Submit** button at the bottom of the page.

10. Users receive the following **message**:



11. Click **OK**.

12. User is returned to the **Custom Import** page.

13. Click on the **Refresh All Lists** button.

14. EVEN IF file submitted correctly, under the **Custom Import History** section, users WILL STILL see an **Error Report** value listed under the far right column for their file – HOWEVER – this actually is a confirmation that the Inventory was successfully updated.

Current Jobs

Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Run Now	Deactivate
No records to display.								


Custom Import History

Import Type	Description	Status	User Name	Date Completed	Records Read	Records Processed	Dropped Records	Errors Found	
Inventory Adjustment	Inventory Adjustment Job	Completed	Dave O'Connell	05/06/2024 1:12:40 PM	2	2	0	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Dave O'Connell	05/06/2024 11:52:58 AM	50	50	0	0	No Error Report
New Name Import	New Name Import Job	Completed	Dave O'Connell	05/06/2024 11:20:54 AM	129	129	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 11:49:09 AM	50	50	0	0	No Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 10:03:48 AM	50	50	50	0	<a href="#">Error Report</a>
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	<a href="#">Error Report</a>

15. Click on the Error message – it will auto populate a downloaded Excel file – open the file – it indicates the import was **Successfully adjusted**.


Message	Product_SKU	Warehouse_Name	Adjustment_Amount	Adjustment_Date	Unit_Cost
** INFORMATION: Successfully adjusted SKU [123182] with amount [1000]. **	123182	Main	1000	5/6/2024	5
** INFORMATION: Successfully adjusted SKU [123230] with amount [1000]. **	123230	Main	1000	5/6/2024	5

16. If users navigate to the imported **Inventory Product**, open it, and go to the **Adjustments** tab, they should also see confirmation via a new entry showing an **Imported Adjustment** for the correct amount.

 **123182 - Tall Coffee Mug**

Save Record PO + Add Assets - Deduct Assets ↔ Transfer Assets

General Attributes Media Assets Adjustments

Refresh 

Date	Beginning Balance	Adjustment Amount	New Balance	Entered By	Notes
05/06/2024	1442	1000	2442	Dave O'Connell	Imported Adjustment
06/22/2021	1492	-50	1442	Steve Veto	manual inventory EOY
06/22/2021	1292	200	1492	Steve Veto	
06/22/2021	1192	100	1292	Steve Veto	
06/14/2021	1195	-3	1192	Leah Wright	Fulfillment
07/07/2020	1197	-2	1195	Scott Martinson	Fulfillment
06/27/2019	1200	-3	1197	Lindsey Bevan	Fulfillment
06/20/2018	1250	-50	1200	Steve Veto	Imported Adjustment
06/19/2018	250	1000	1250	Steve Veto	Imported Adjustment
04/30/2018	0	250	250	Steve Veto	

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