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.

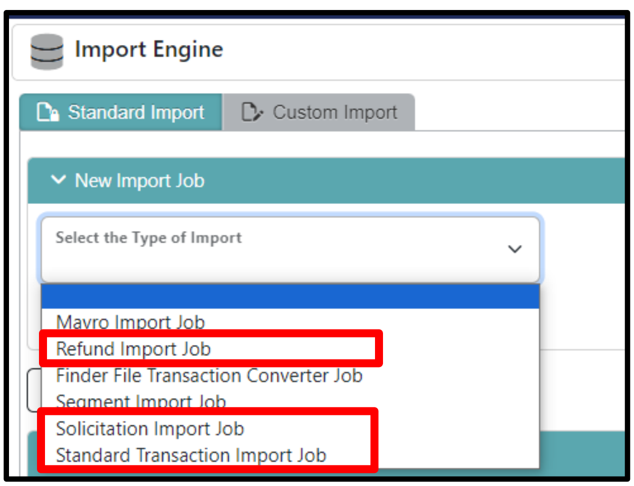
If users need to understand the methods for entering Batches and Transactions into Rapid Entry or for correcting data within that software, they should consult the **Rapid Entry and Transactions** module.

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.



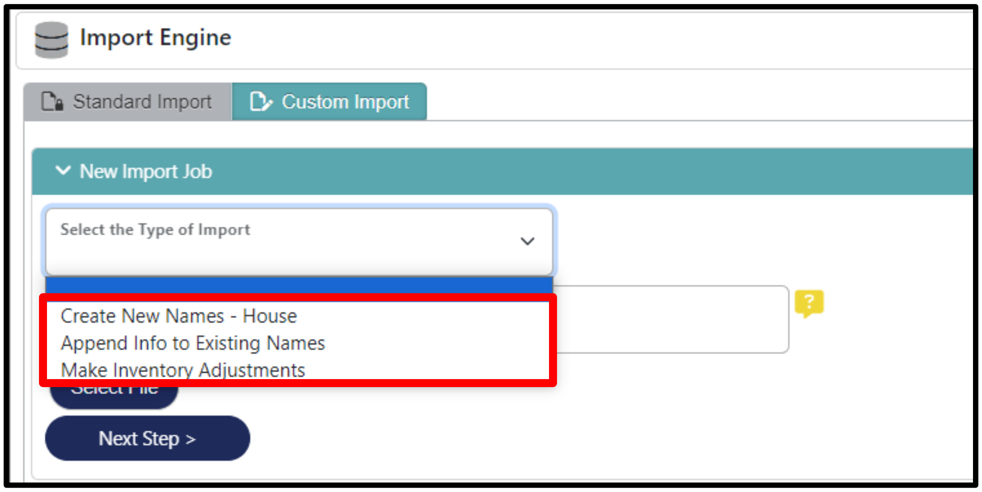
Refund Import Job – Enable users to bulk refund a list of transactions. For example, if a conference were cancelled and a user needed to refund the tickets purchased for the event. Users would run the Refund and as long as the imported file contained the related invoice numbers, the Transactions would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

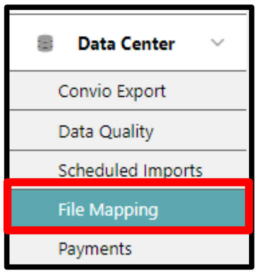
File Mapping

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.

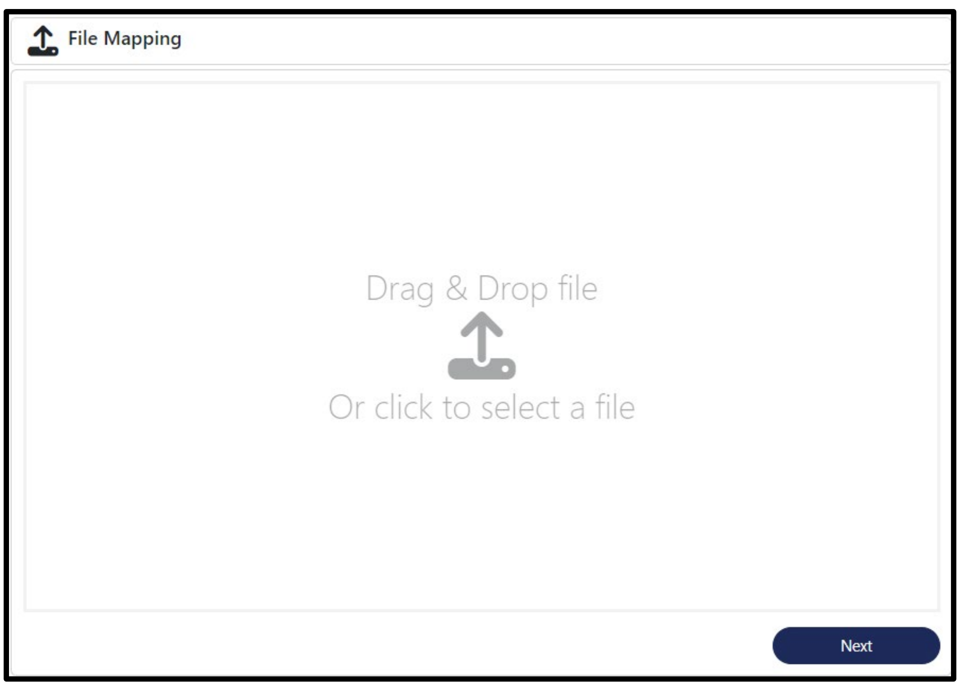
File Mapping Creation STEPS

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.

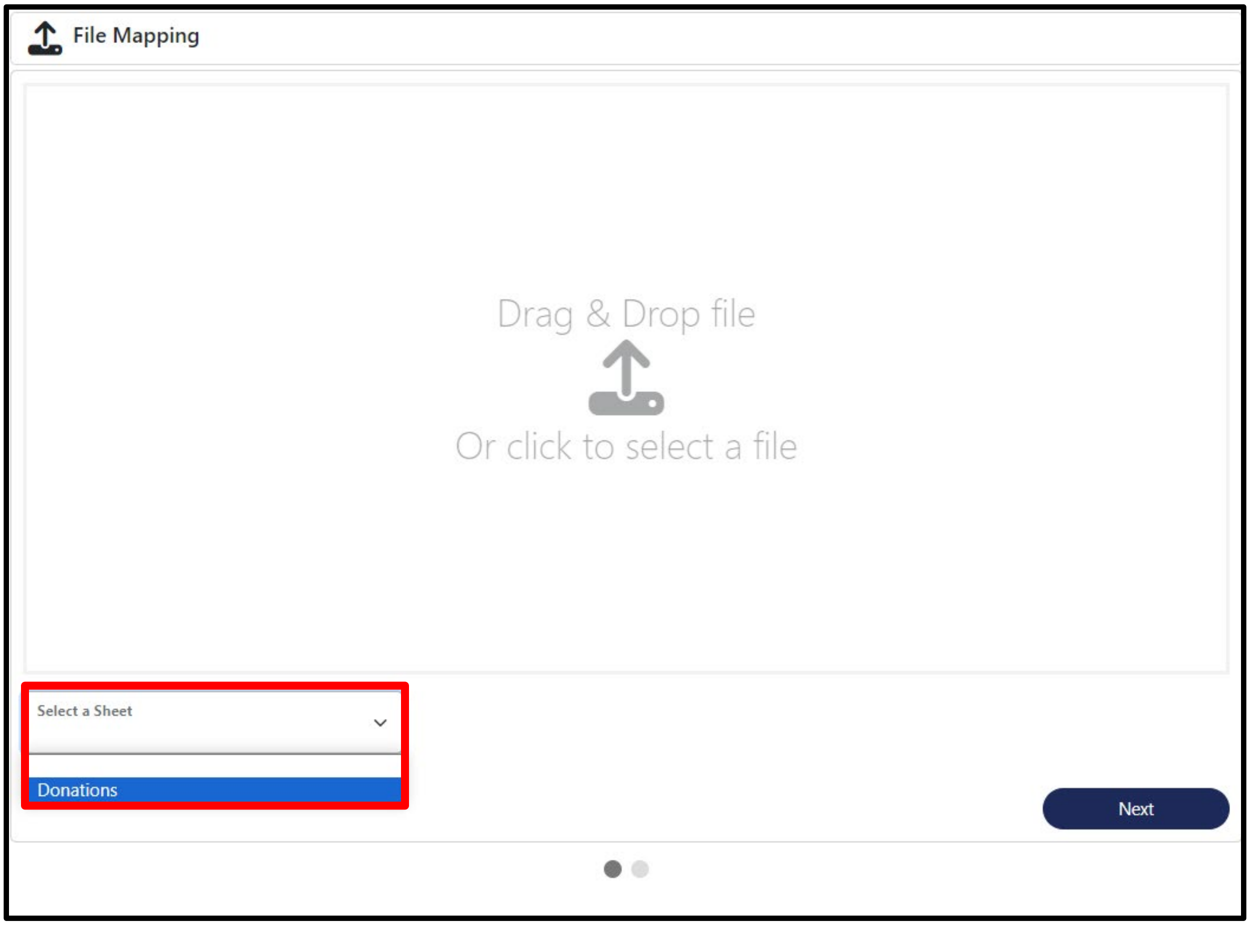


2. Users can **Drag & Drop** file Or **Click to Select a File**.
   - Drag & Drop – Users locate file in File Explorer folder and drag and drop onto screen.
   - Select a File – Users browse to location and click on file to add to screen.

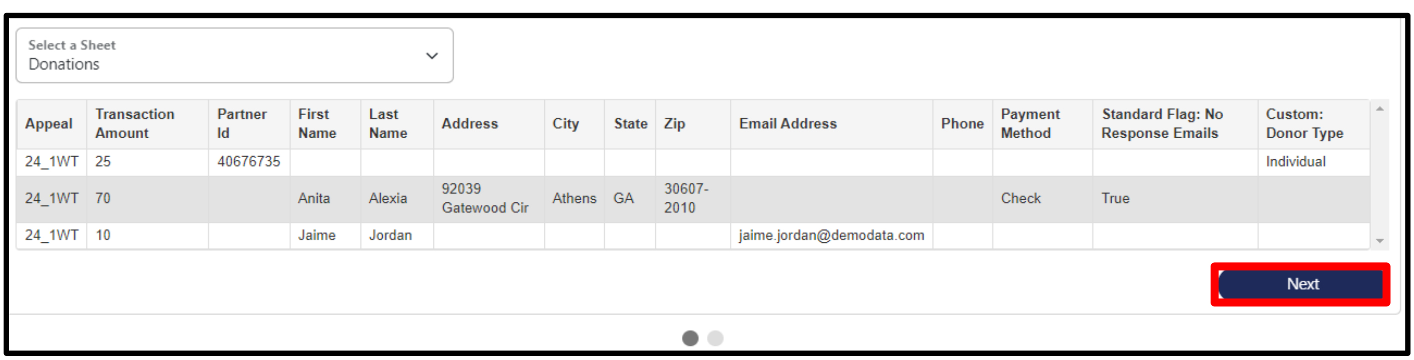


3. In the example below, the **Click to Select** file option has been selected for an **Excel** File.

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.

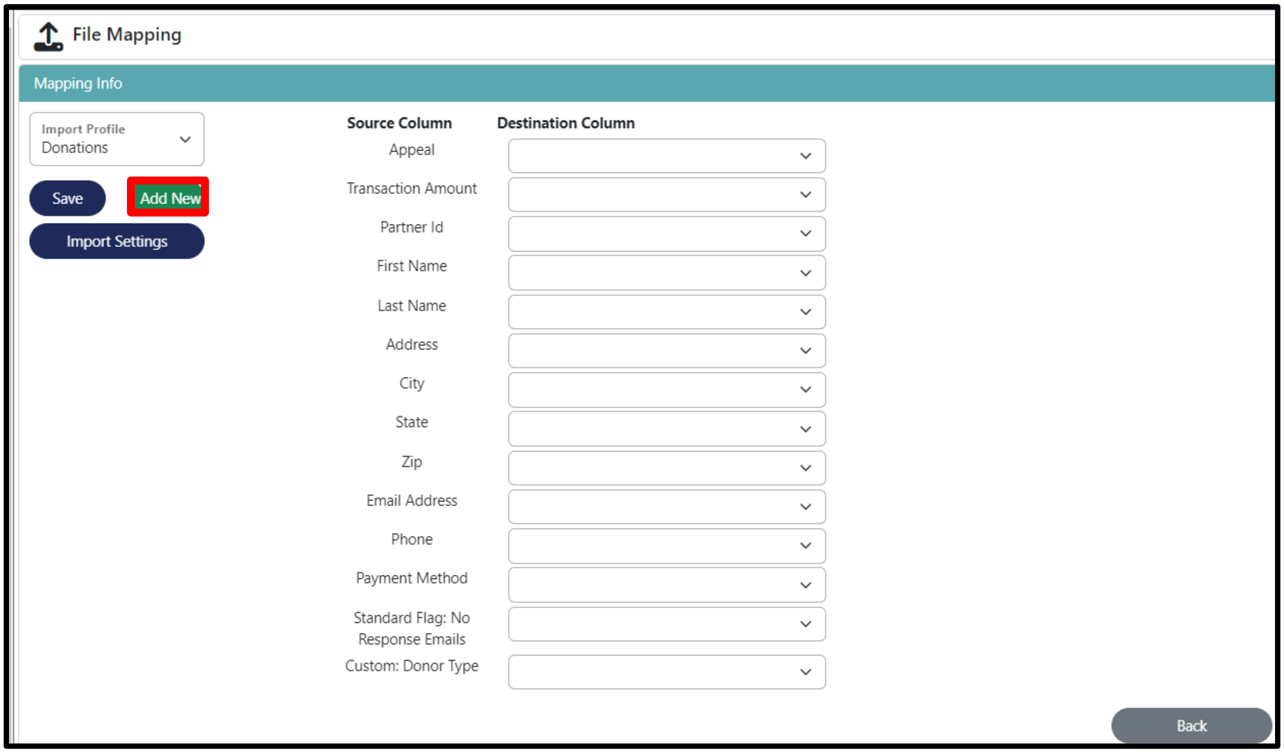


Appeal	Transaction Amount	Partner Id	First Name	Last Name	Address	City	State	Zip	Email Address	Phone	Payment Method	Standard Flag: No Response Emails	Custom: Donor Type
24_1WT	25	40676735											Individual
24_1WT	70		Anita	Alexia	92039 Gatewood Cir	Athens	GA	30607-2010			Check	True	
24_1WT	10		Jaime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

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.

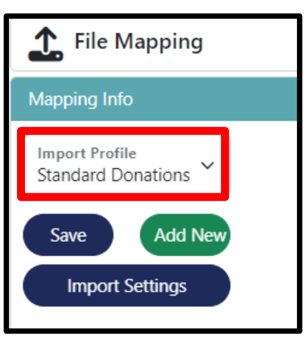


8. Click the **Add New** button to create a new mapping **Import Profile**.

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.



STOP STEPS – READ BELOW

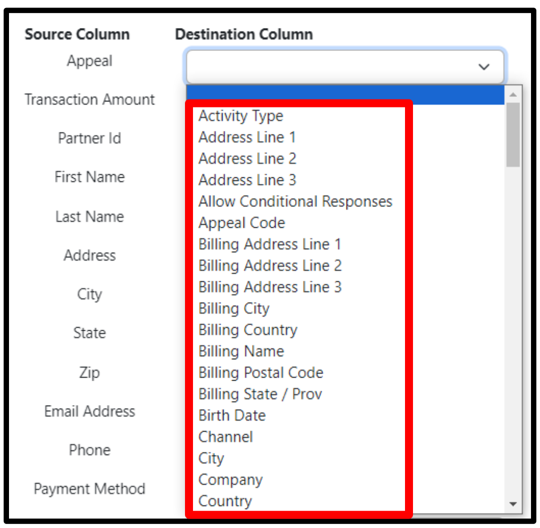
Destination Column Division Explanations & Required Destination Import Fields

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

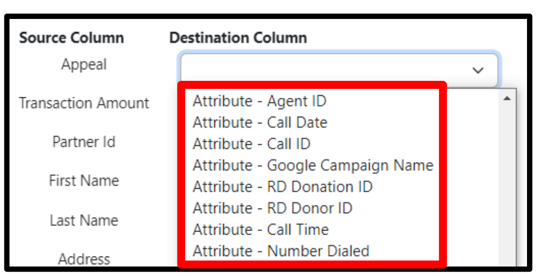
I. Destination (Aegis CRM) Column Divisions

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

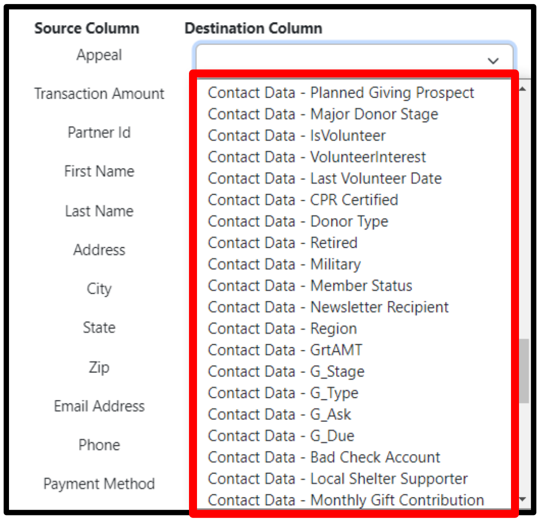
- **Standard** – Fields at the TOP of dropdown list that have NO leading text. These fields are Stock **Donor** record fields.



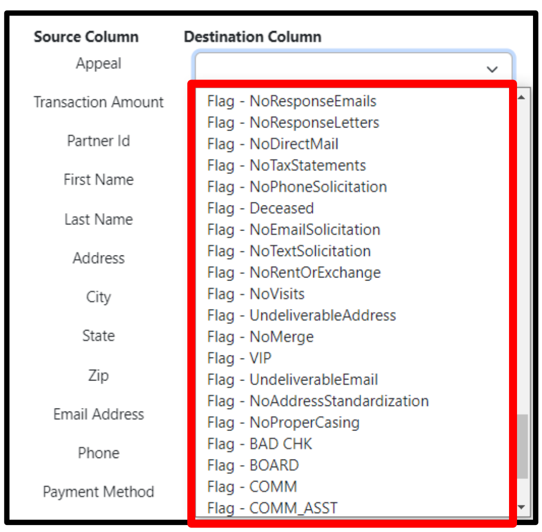
- **Custom Attributes** – Fields in the SECOND area of dropdown list that have the leading text of ATTRIBUTE. These fields are **Transaction** record Attribute fields.



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



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



II. Required Destination Import Fields

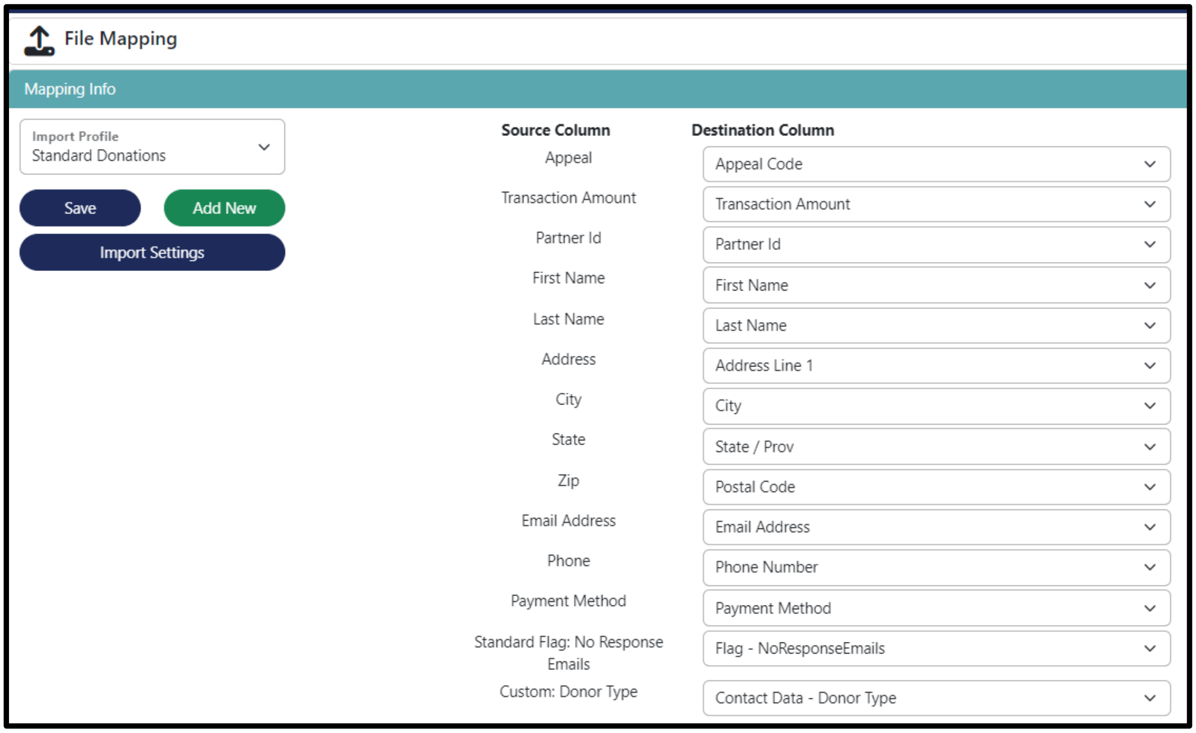
For every Import Profile created, there is a base requirement of certain Destination fields to be present in order to drive proper mapping and/or matching. The following criteria MUST be met in order for a new Import Profile to save successfully.

- 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**

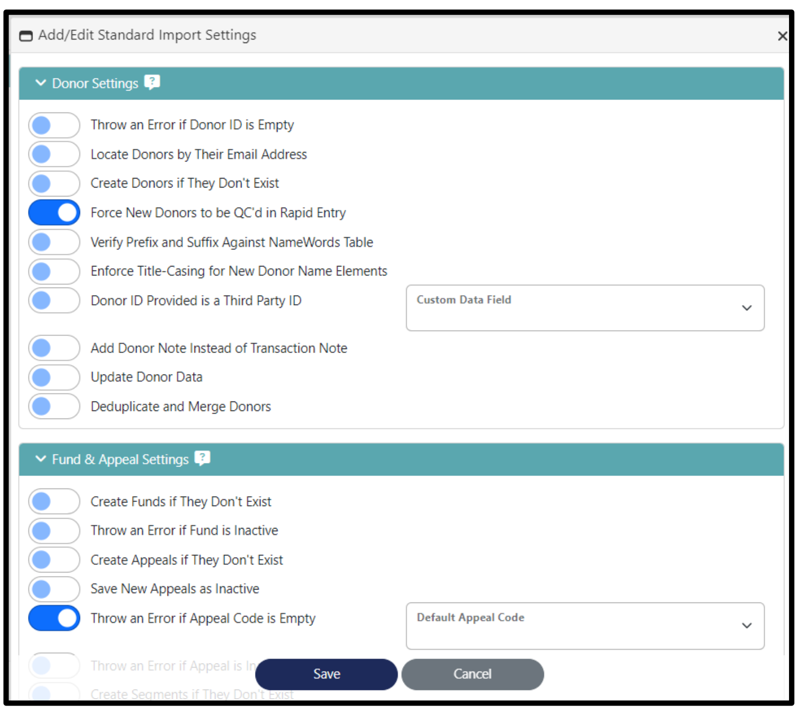
- For an Import Profile that CREATES NEW DONORS, and be able to import Transactions if desired the following fields must be added:
    - **First Name**, **Last Name** + **Address**
      OR
    - **First Name**, **Last Name** + **Email Address**
      OR
    - **First Name**, **Last Name** + **Phone #**
    - **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:



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.

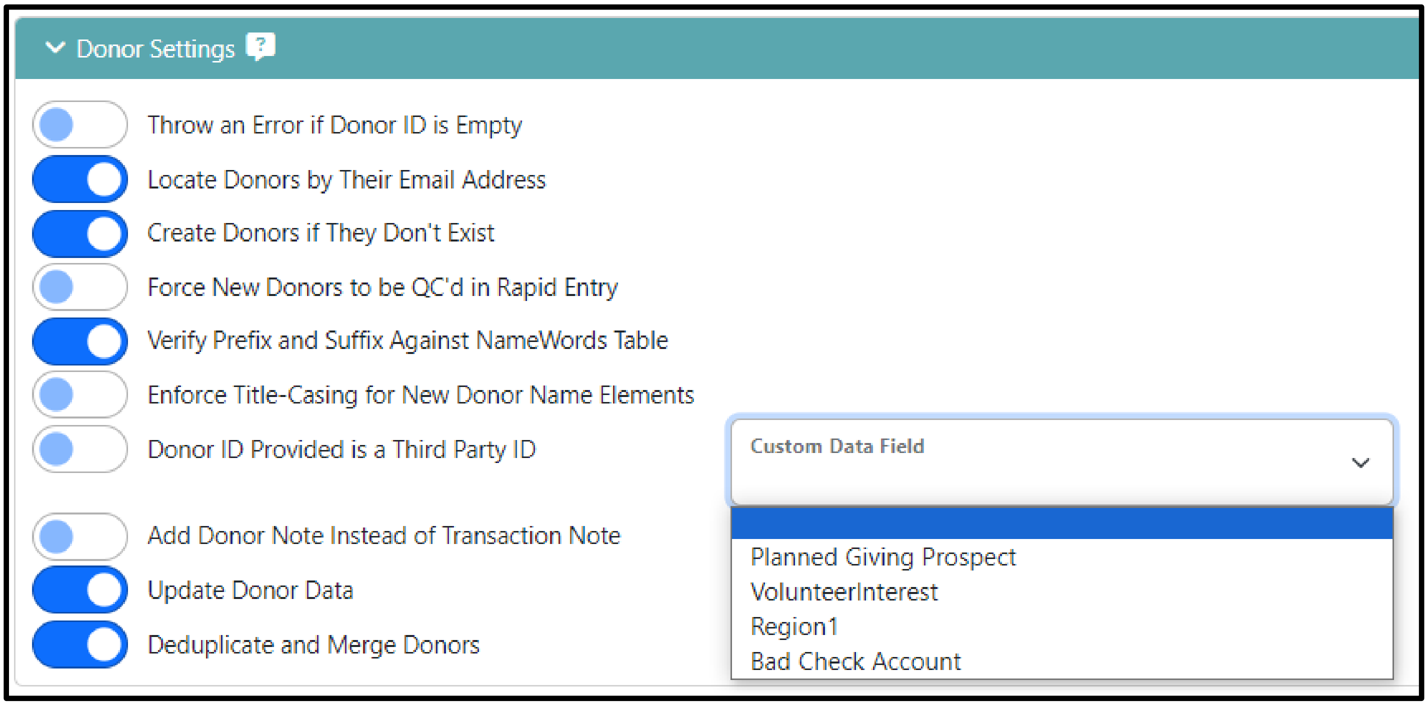


Import Settings for File Mapping

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.



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 3rd 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.

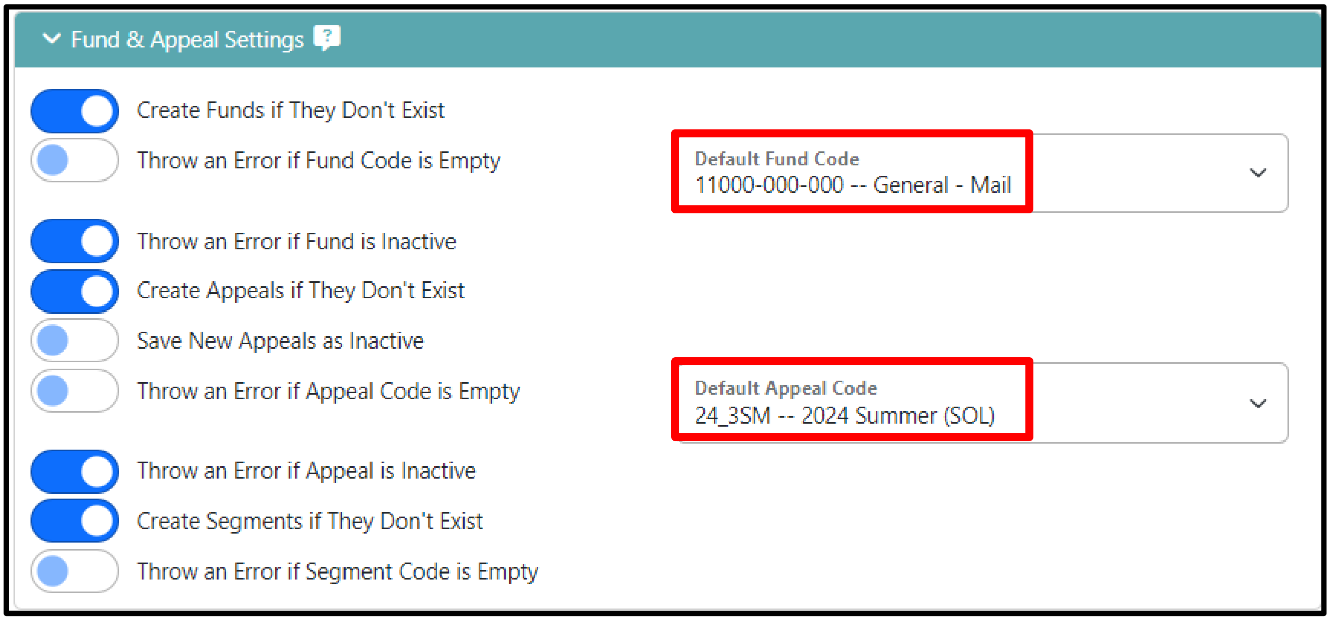
Update Donor Data – Updates and/or overwrites existing data with whatever data is being imported. Used if client decides to flatly accept imported data as the most recent data for the Donor. Often.

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 – 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.

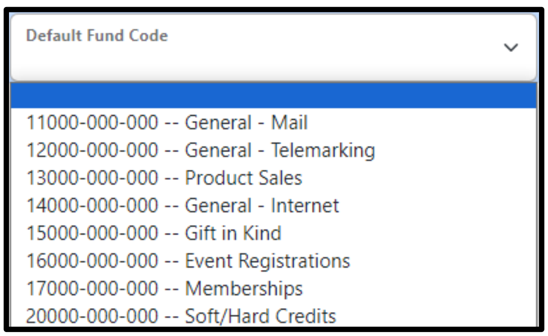
Throw an Error if Appeal Code is Empty – IF an imported Transaction's listed Appeal Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having an Appeal Code to Import. NOT Often.

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.

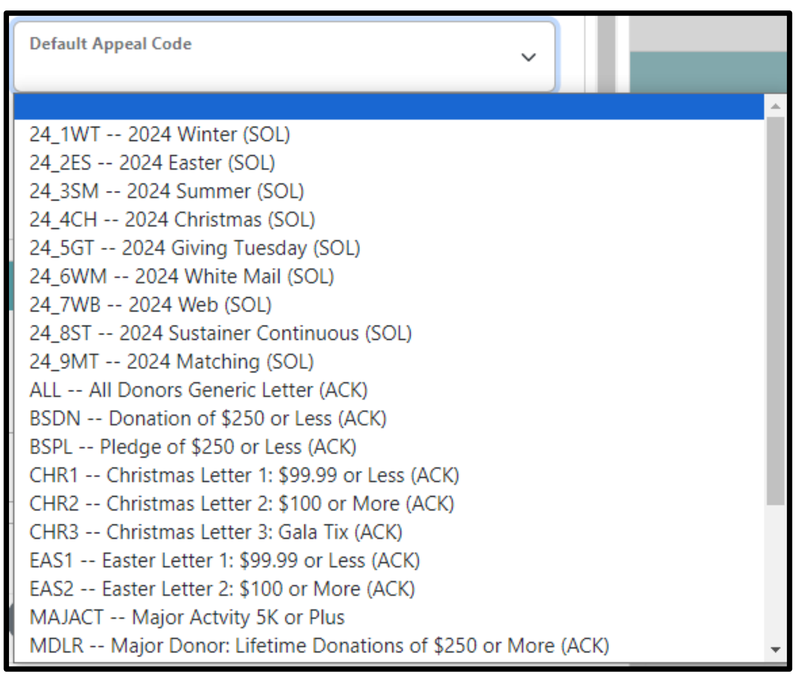
Create Segments if They Don't Exist – Segments loaded will be labeled, "Created by Aegis Imports, please update." Often.

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.

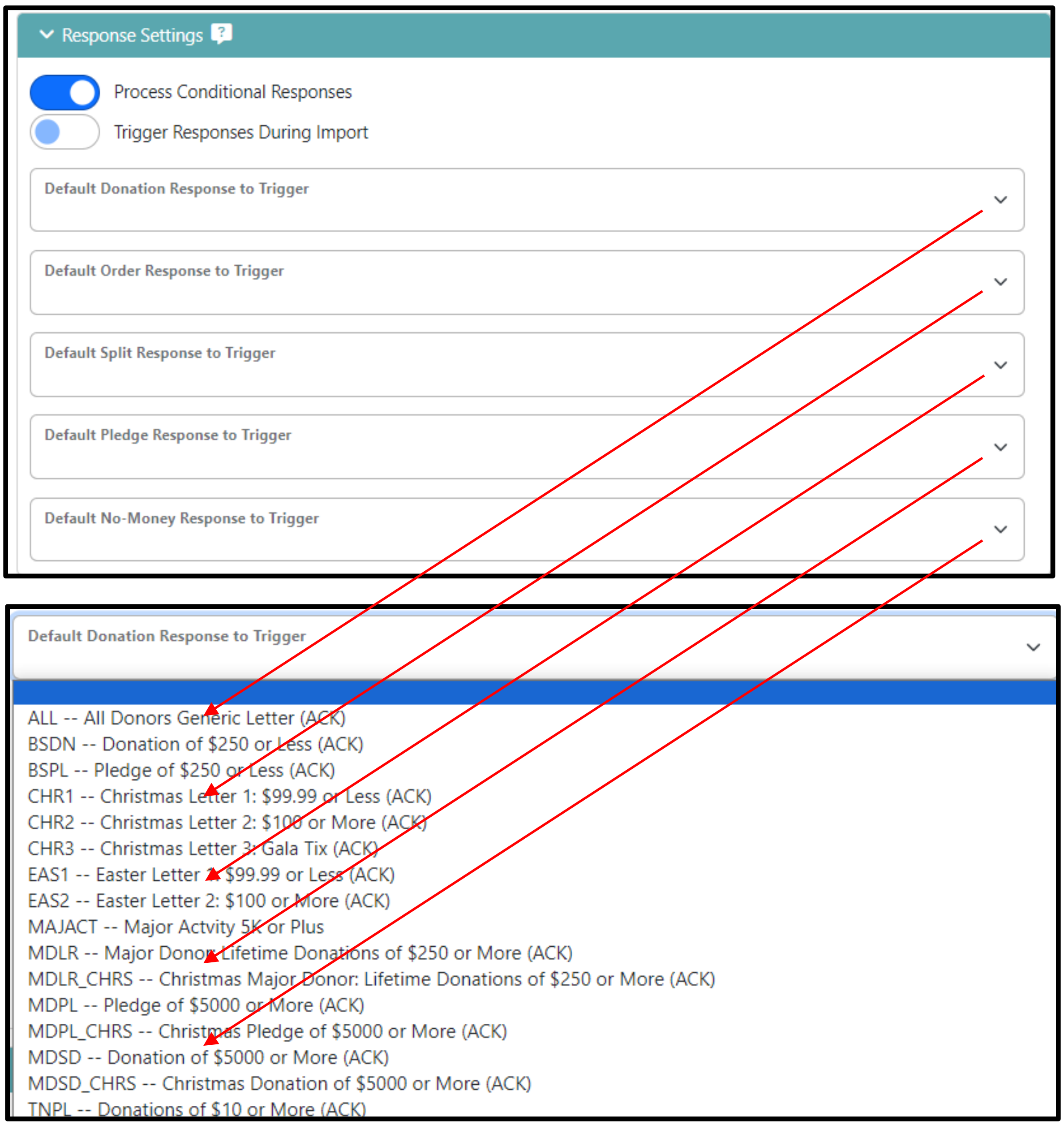


Response Settings

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.

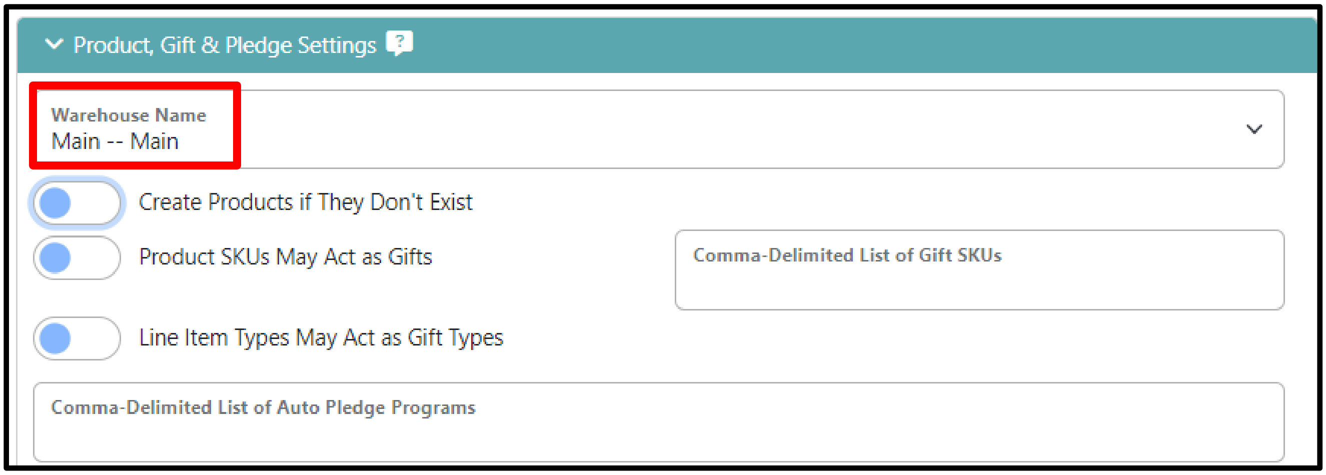
In MOST scenarios, users would want the **Process Conditional Responses** toggle selected so as to leverage the Appeal Acknowledgement ability to set up Conditional Acknowledgements.

The Trigger Responses during Import would force users to…



Product, Gift, & Pledge Settings

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



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.

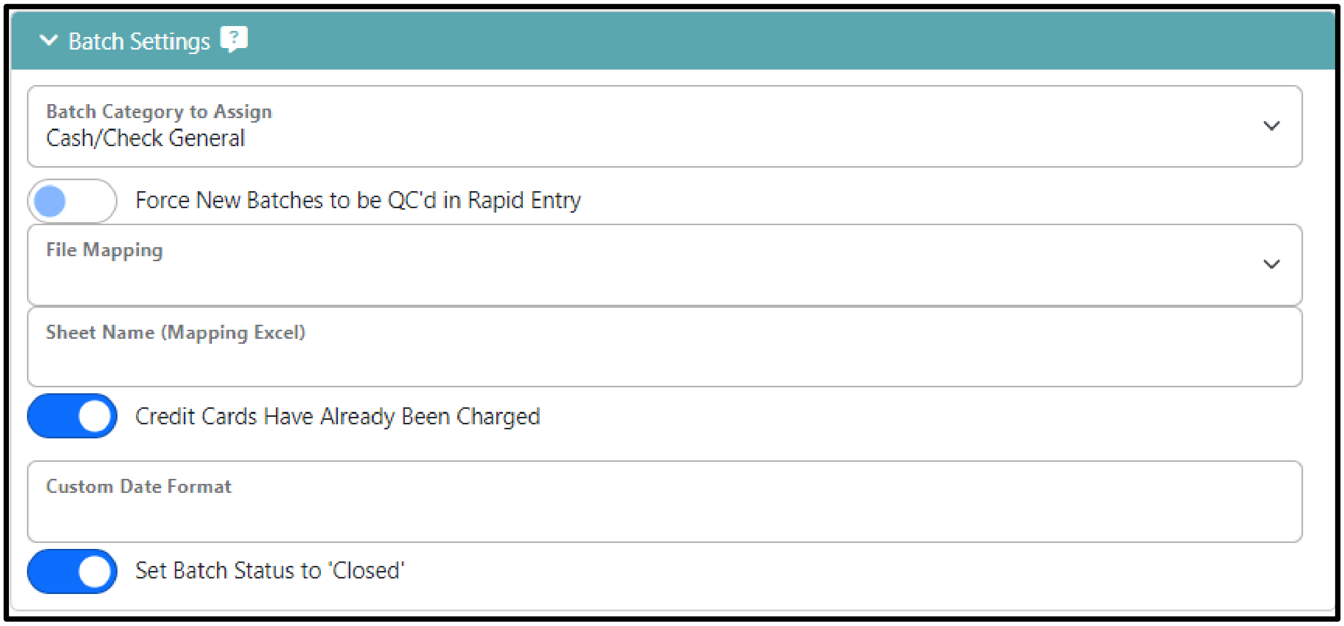
Line-Item Types May Act as Gift Types – Enables Line-Item Types to act as Gift Types when imported. NOT Often.

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.

14. Click on **Save** on the **Import Settings** screen.

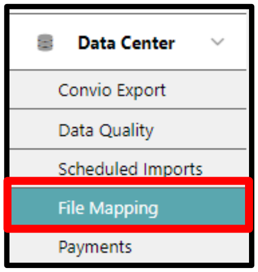
15. Click on **Save** on the **Mapping Info** screen.

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.

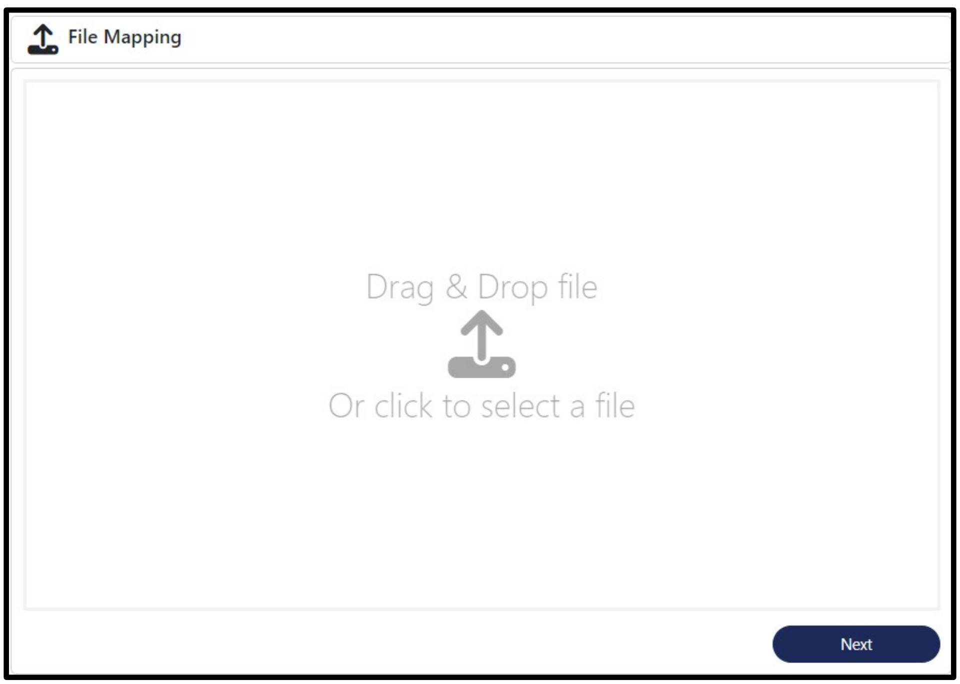
File Mapping Editing STEPS

Follow these steps to edit an existing File Mapping.

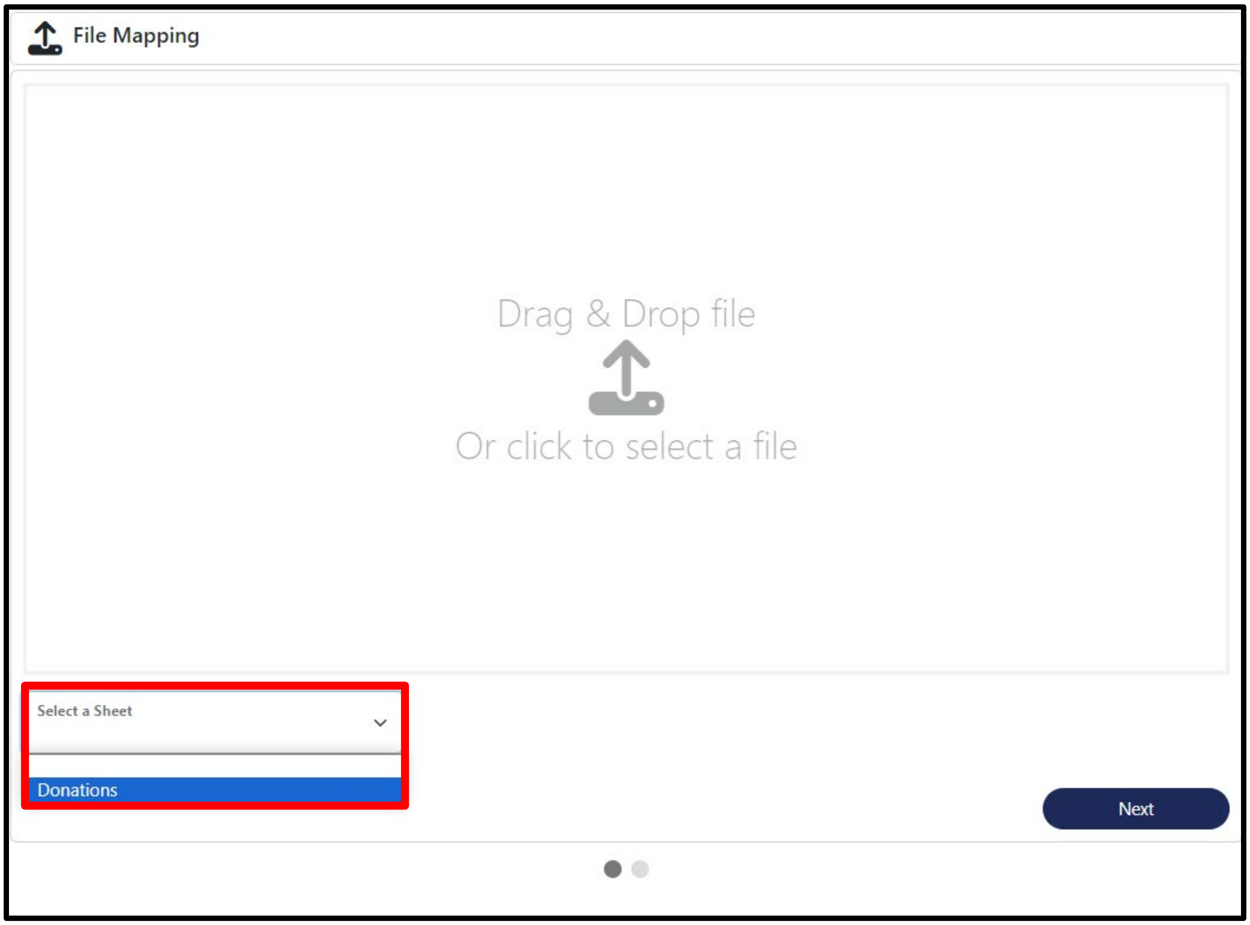
1. Click on the **Data Center** module, **File Mapping** sub-module.



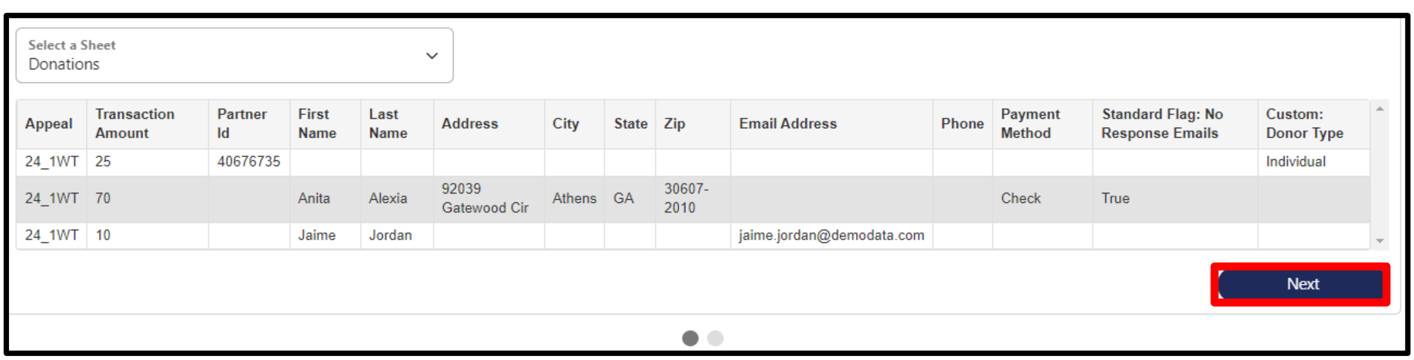
2. Users need to **Drag & Drop** file Or **Click to Select a File** with which they want to replace the existing File Mapping.
    - Drag & Drop – Users locate file in File Explorer folder and drag and drop onto screen.
    - Select a File – Users browse to location and click on file to add to screen.



3. 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**



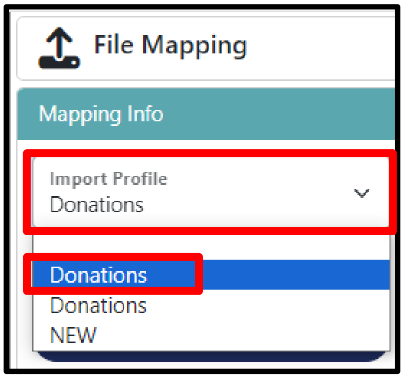
4. At the bottom of the sheet, users receive a **preview of 3 entries** from the Excel sheet to confirm that sheets layout is acceptable.



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				

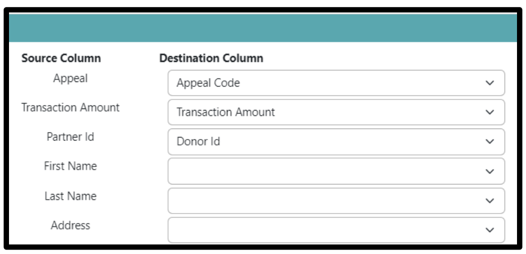
5. Click on the **Next** button.

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**.



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.

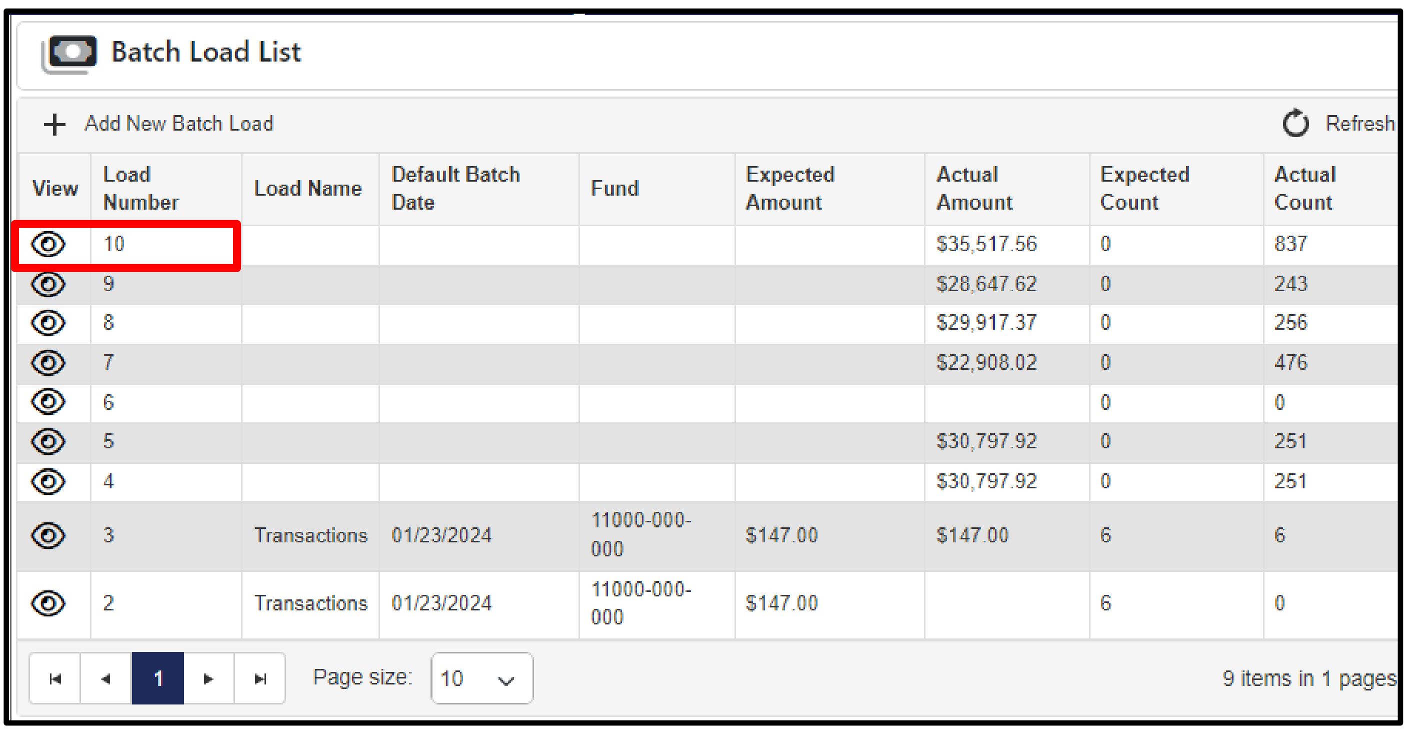
Reviewing Batch Loads

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.



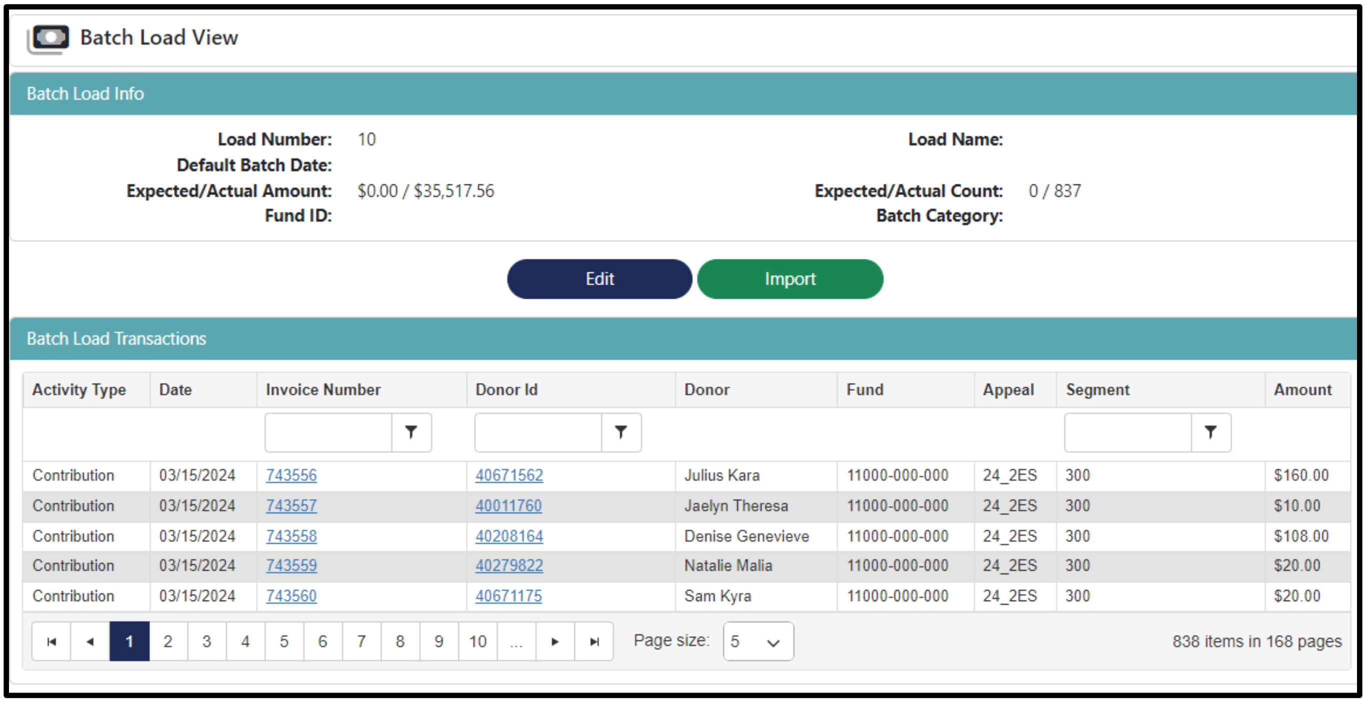
Batch Load List

+ Add New Batch Load   Refresh

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

1   Page size: 10   9 items in 1 pages

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



Batch Load View

Batch Load Info

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

Edit | Import

Batch Load Transactions

Activity Type	Date	Invoice Number	Donor Id	Donor	Fund	Appeal	Segment	Amount
Contribution	03/15/2024	743556	40671562	Julius Kara	11000-000-000	24_2ES	300	$160.00
Contribution	03/15/2024	743557	40011760	Jaelyn Theresa	11000-000-000	24_2ES	300	$10.00
Contribution	03/15/2024	743558	40208164	Denise Genevieve	11000-000-000	24_2ES	300	$108.00
Contribution	03/15/2024	743559	40279822	Natalie Malia	11000-000-000	24_2ES	300	$20.00
Contribution	03/15/2024	743560	40671175	Sam Kyra	11000-000-000	24_2ES	300	$20.00

1 2 3 4 5 6 7 8 9 10 ... Page size: 5 — 838 items in 168 pages

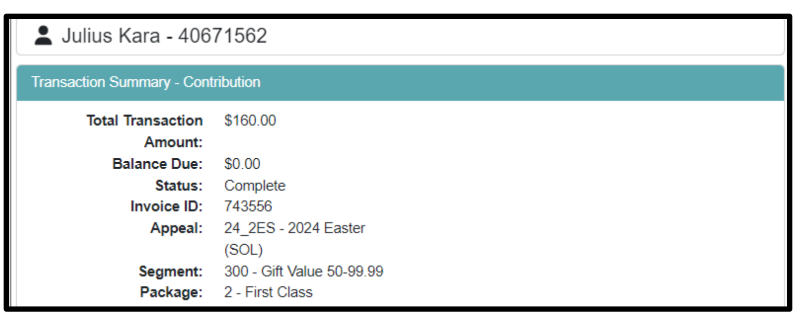
Batch Load Info Section

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.



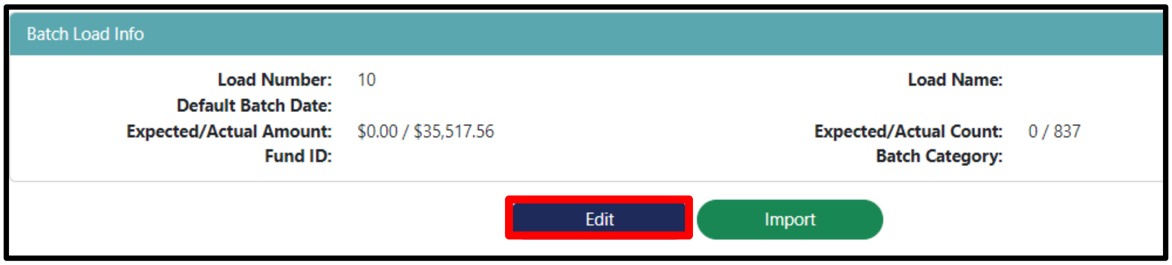
Julius Kara - 40671562

Transaction Summary - Contribution

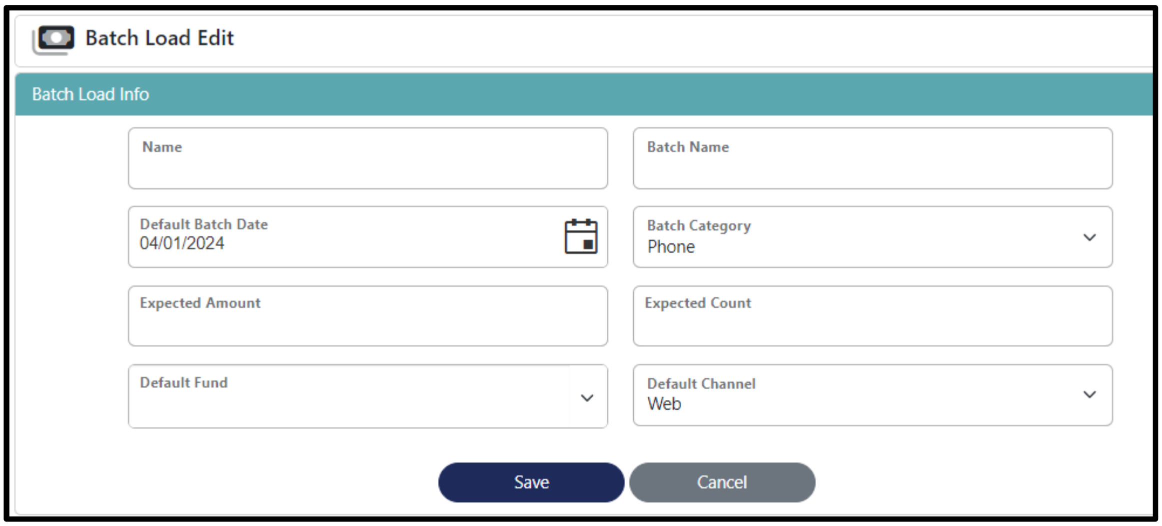
Total Transaction Amount: $160.00
Balance Due: $0.00
Status: Complete
Invoice ID: 743556
Appeal: 24_2ES - 2024 Easter (SOL)
Segment: 300 - Gift Value 50-99.99
Package: 2 - First Class

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.



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



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

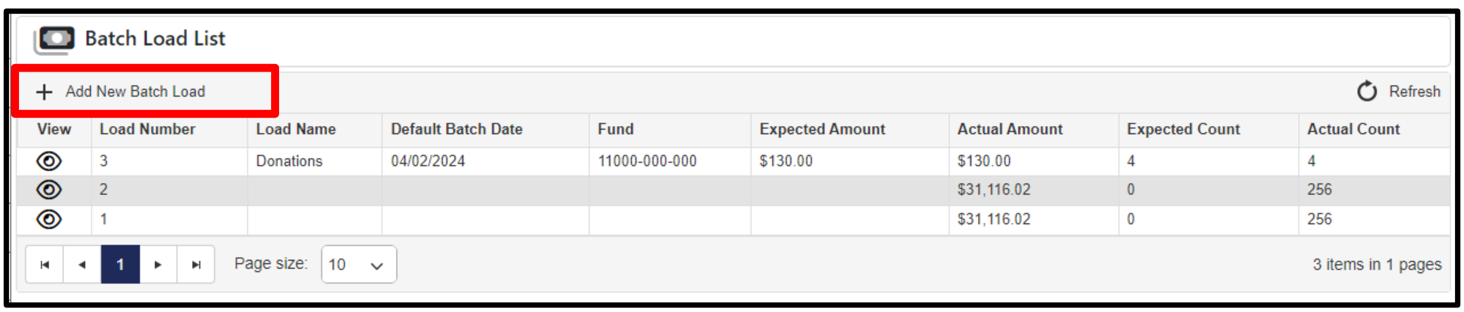
Adding Batch Loads enables users to quickly add large numbers of Transactions to the Aegis CRM. This can be done by adding an Excel or CSV file by utilizing the **+Add New Batch Load** button.

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

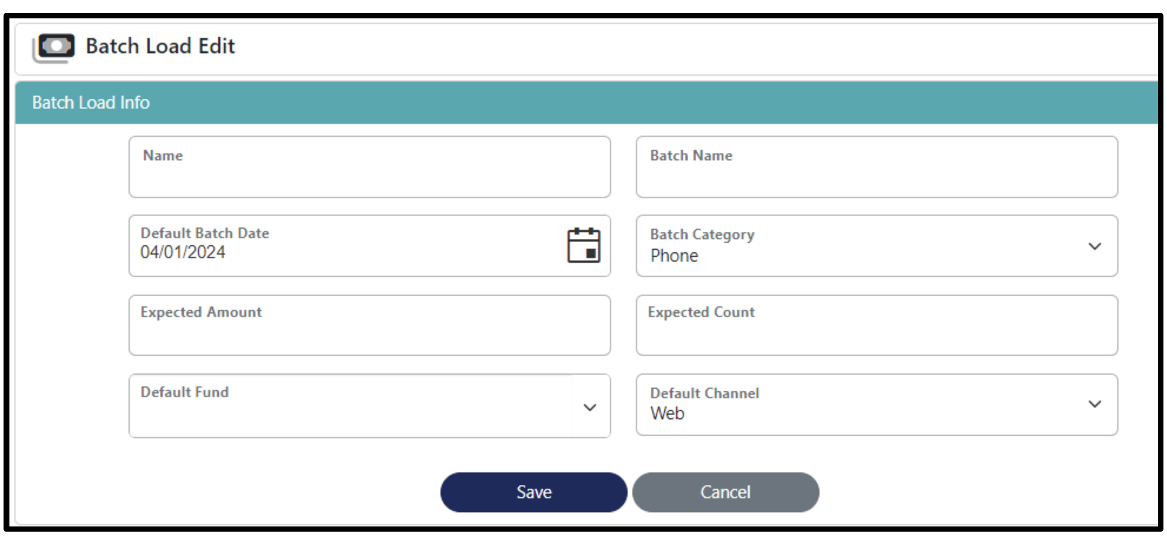
- To see steps on how to create a Batch Load WITH an Import Profile see the **File Mapping Creation STEPS** on page 6 of this manual.
- To see steps on how to create a Batch Load WITHOUT an Import Profile see the **Batch Load Steps** section of the **Batching & Transactions** manual.

Adding Batch Load STEPS

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

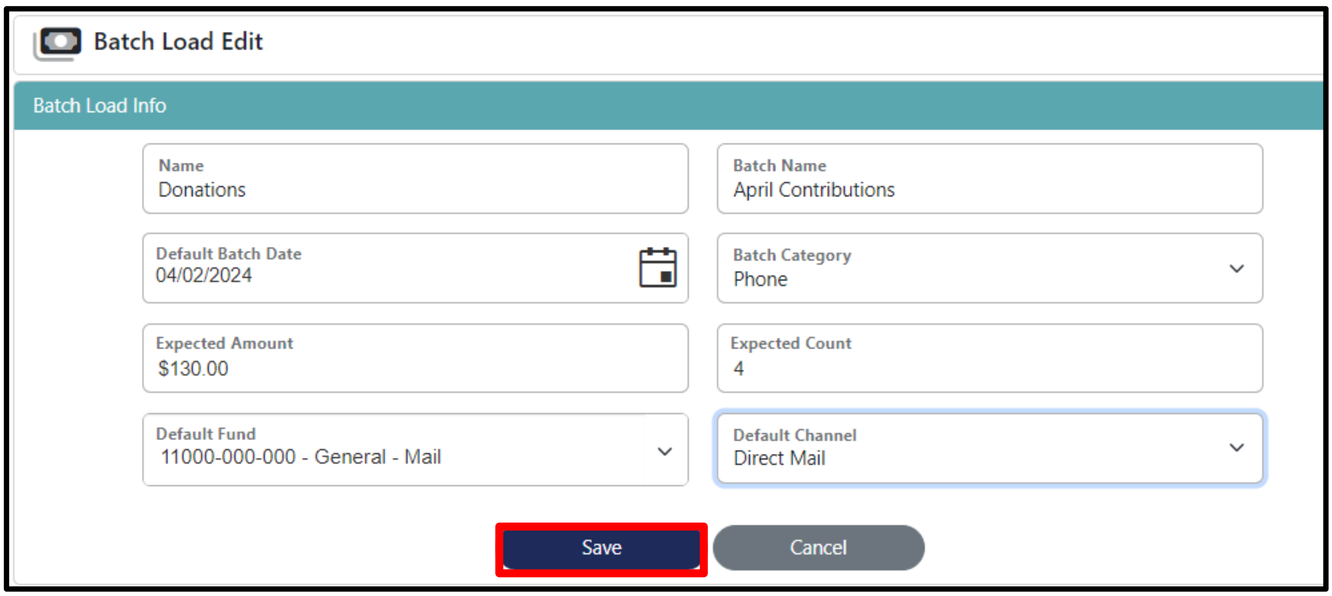


2. The **Batch Load Edit** and Info screen displays.

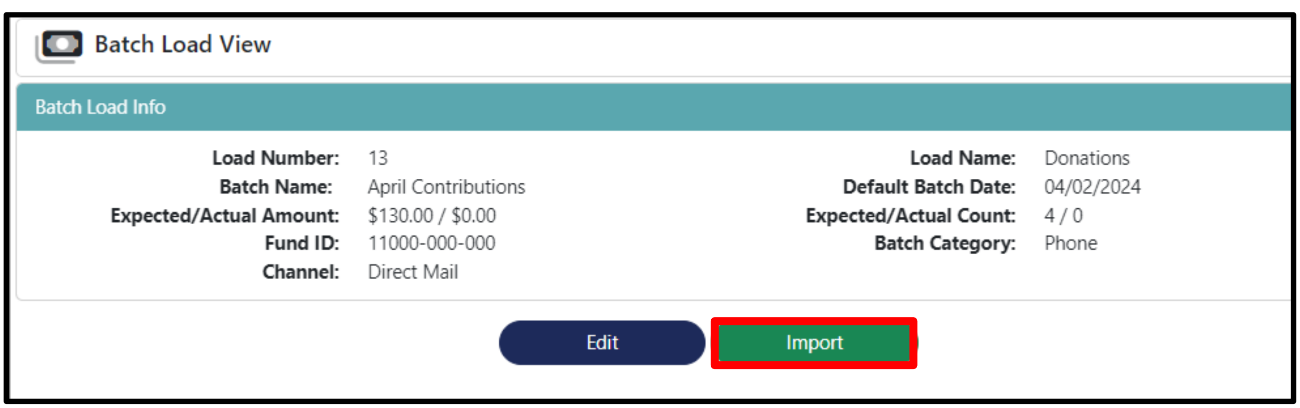


3. Users should name the **Batch Load** with a convention that provides them basic information about the Batch.

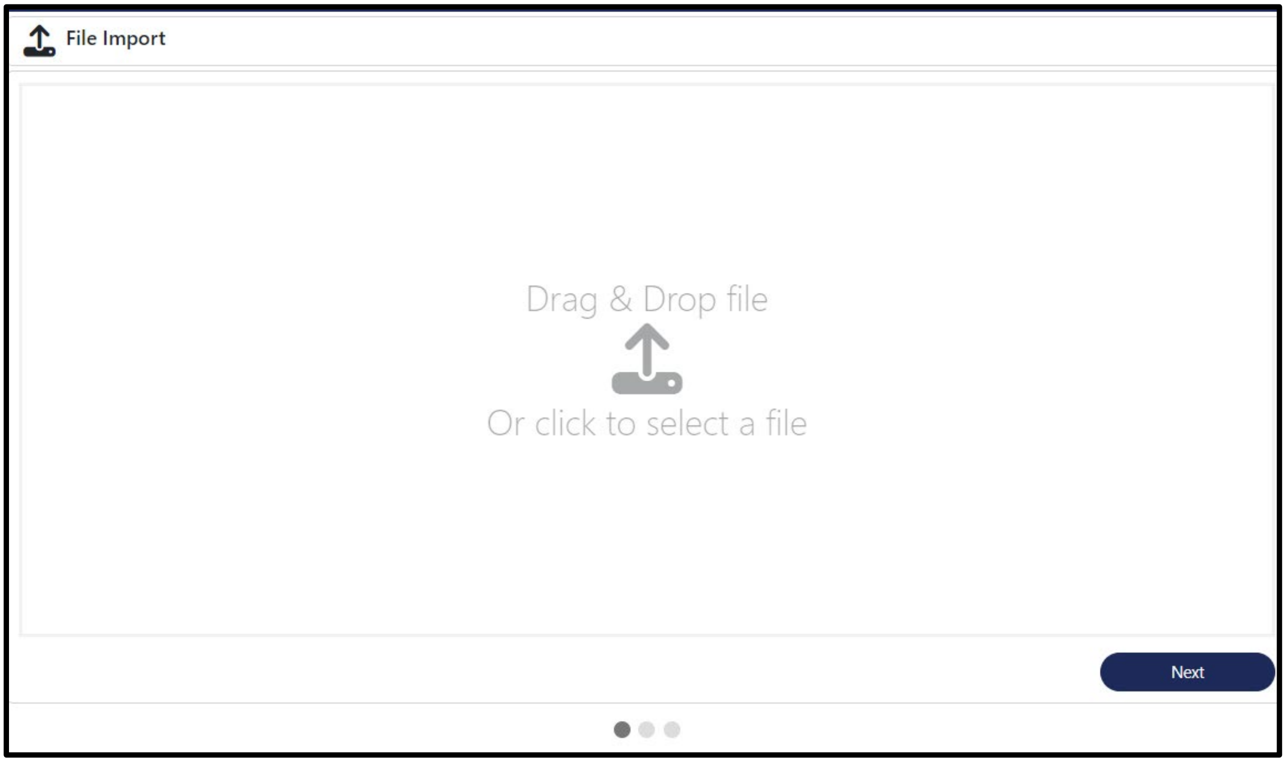
4. In this example the **Batch Load Name** will be **4-1-24 Transactions**, with the following values in the additional fields:
    - **Name** – Donations
    - **Batch Name** – April Contributions
    - **Default Batch Date** – 04/01/2024
    - **Batch Category** – Cash/Check General
    - **Expected Amount** – $500.00
    - **Expected Count** – 5
    - **Default Fund** – 11000-000-000
    - **Default Channel** – Direct Mail



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



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



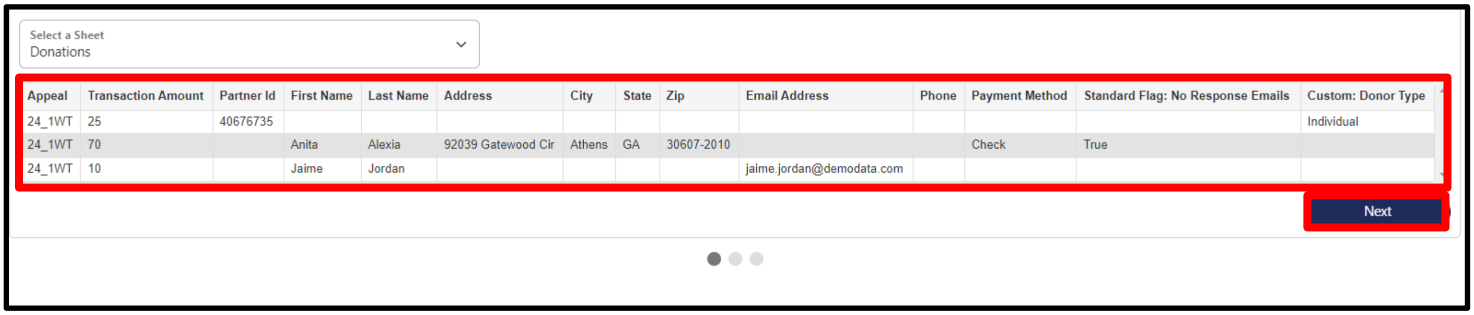
7. The ...**select a file** option takes the user to a **Browse** window.

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.

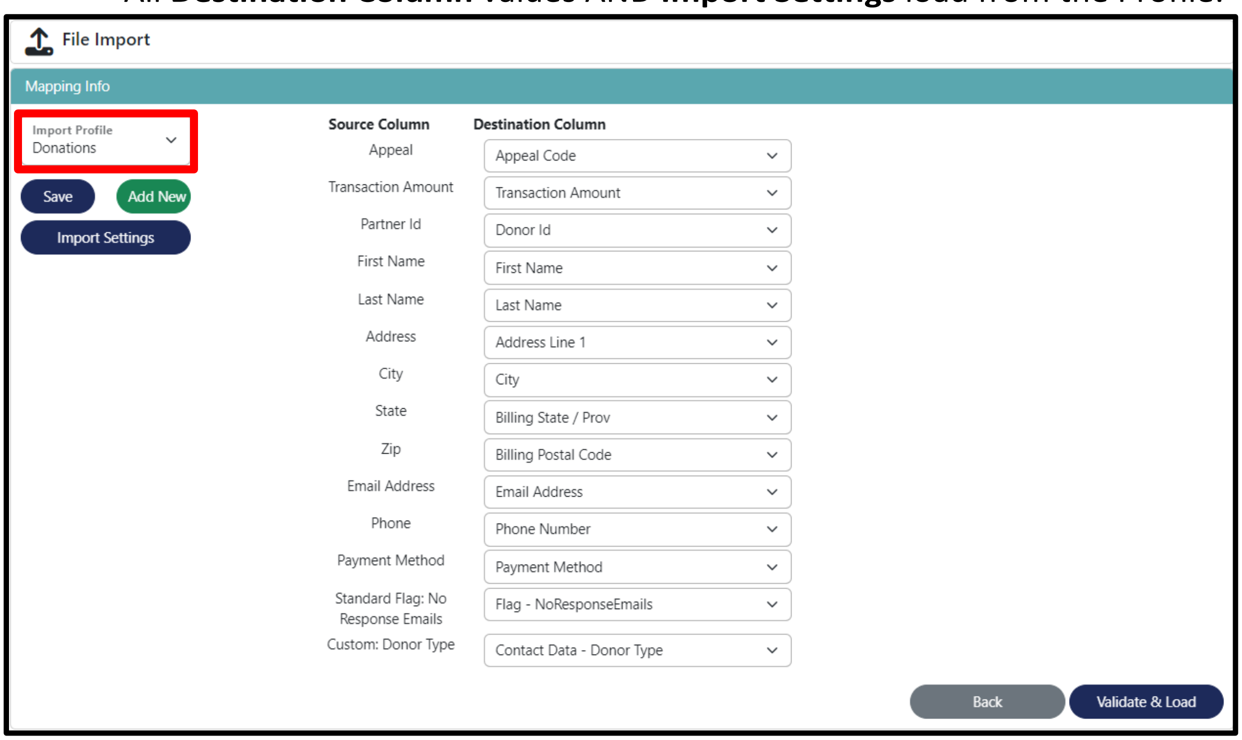


12. Clicking on the **Next** button takes users to the **Mapping Info** screen.

13. At the **Mapping Info** screen users can:
    - Create and **Save an Import Profile** – <u>See File Mapping Creation STEPS on page 6 of this manual for instructions</u>.
    - Create a **One-off Map** of the **imported Data**..

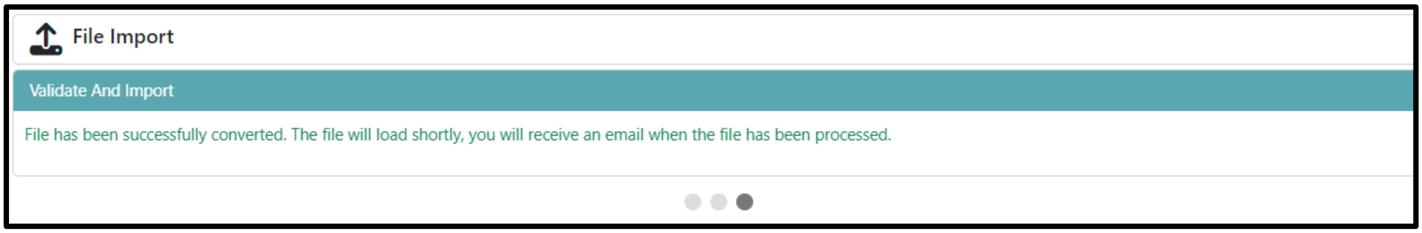
14. In this example, user will leverage an **Import Profile** created previously under the **Data Center>File Mapping** sub-module.
    - It IS highly recommended that users leverage **Import Profiles** to save time in importing.

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.



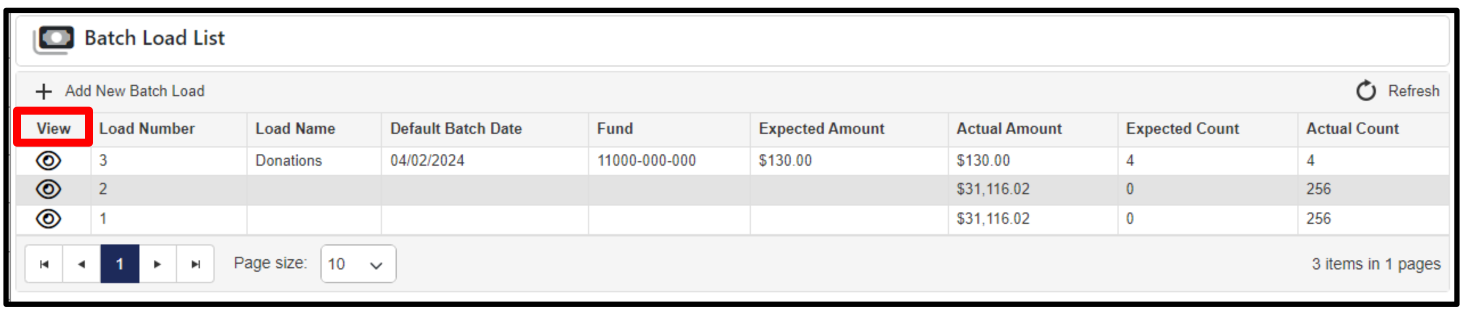
16. Click on the **Validate and Load** button.
    - This loads the data into the system and creates the **Transactions**.

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

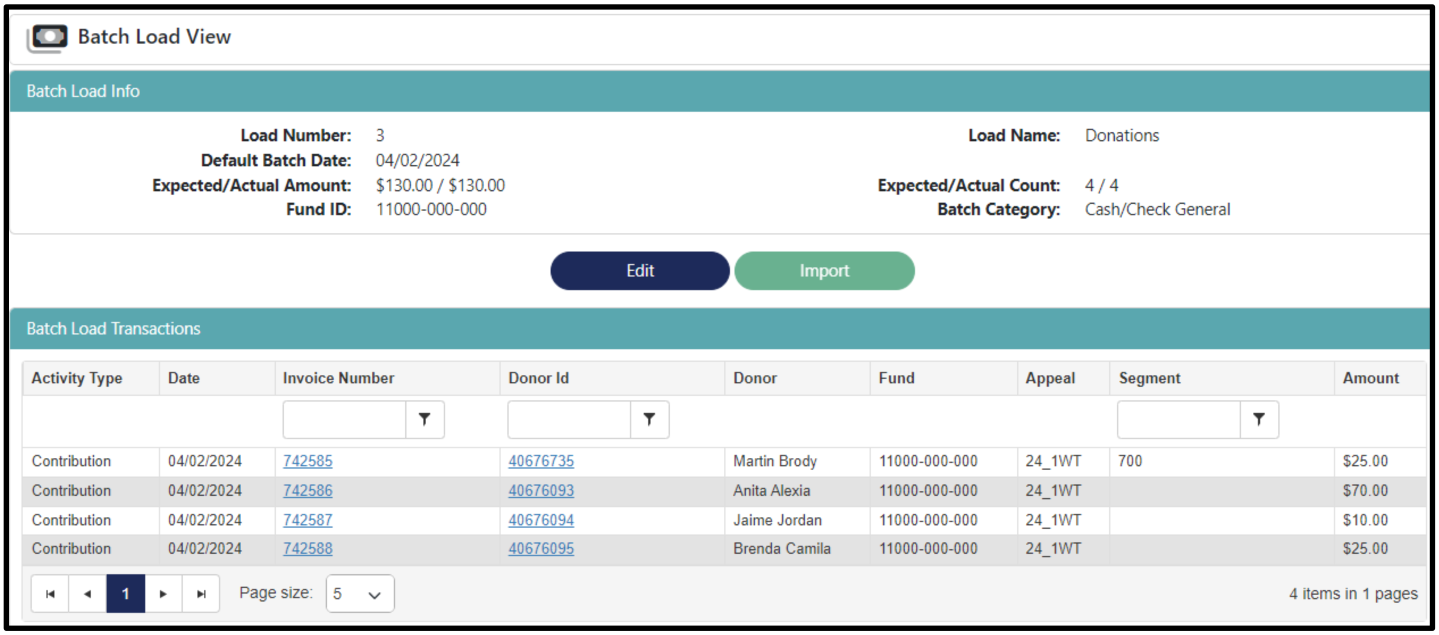


18. Click on the **Batching** module>**Batch Load** sub-module.
    - There is NO back button; users have to return via the **Navigation** menu.

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



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
Contribution	04/02/2024	742585	40676735	Martin Brody	11000-000-000	24_1WT	700	$25.00
Contribution	04/02/2024	742586	40676093	Anita Alexia	11000-000-000	24_1WT		$70.00
Contribution	04/02/2024	742587	40676094	Jaime Jordan	11000-000-000	24_1WT		$10.00
Contribution	04/02/2024	742588	40676095	Brenda Camila	11000-000-000	24_1WT		$25.00

1 Page size: 5

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.

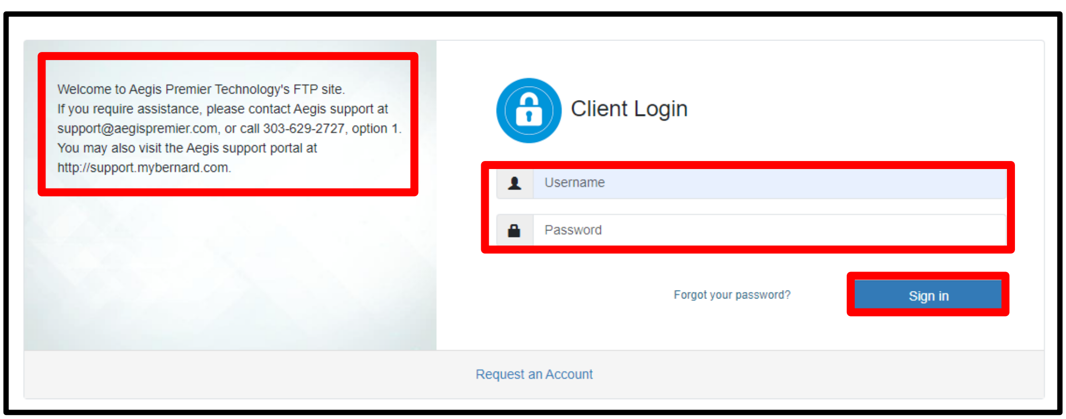
FTP DEMO

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.

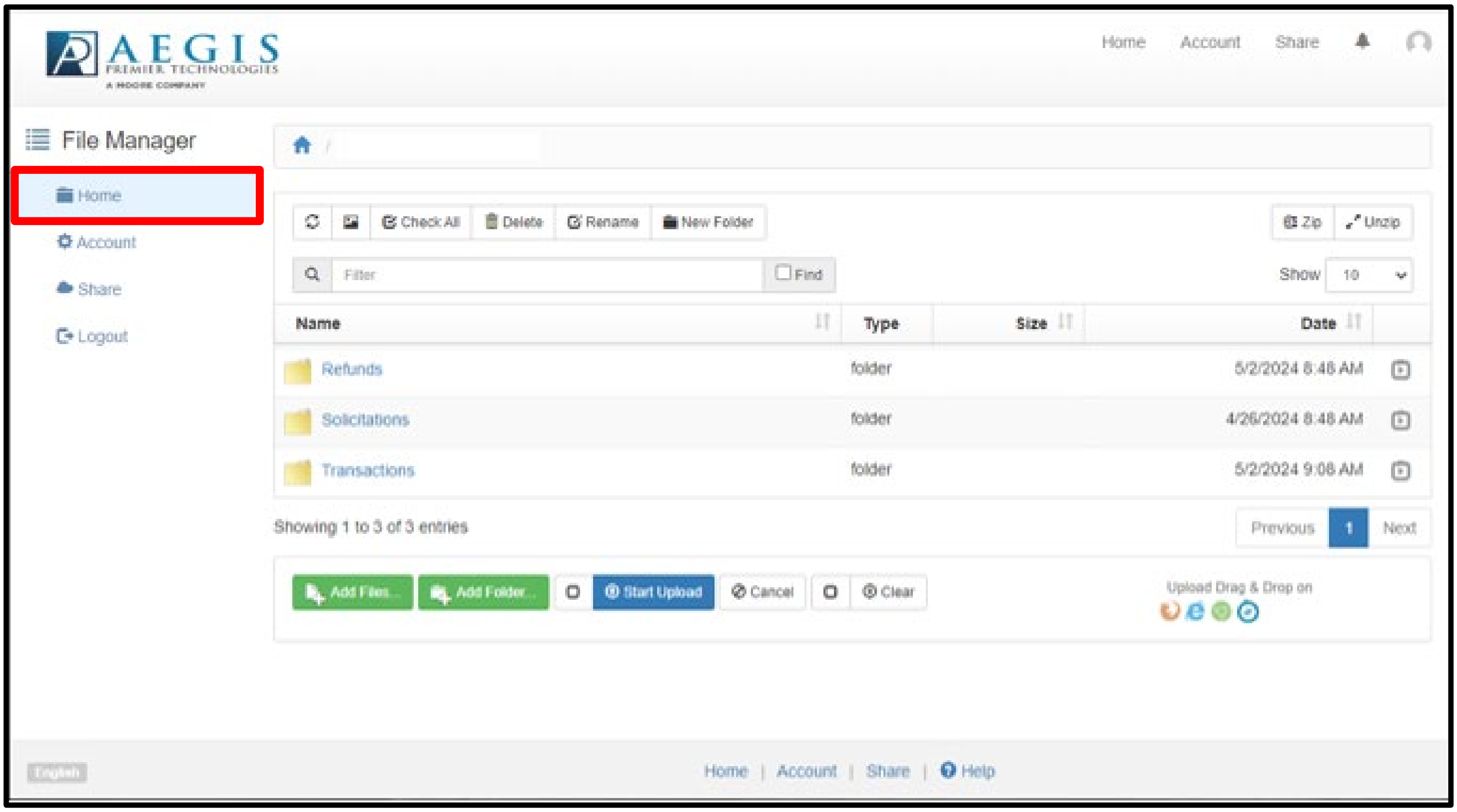
2. From the FTP button dropdown, select the ftp1.bernardsolutions.com option.
   - NOTE: The ftp.mybernard.com site is used for Aegis Queries and Reports storage and is NOT used for Imports.

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



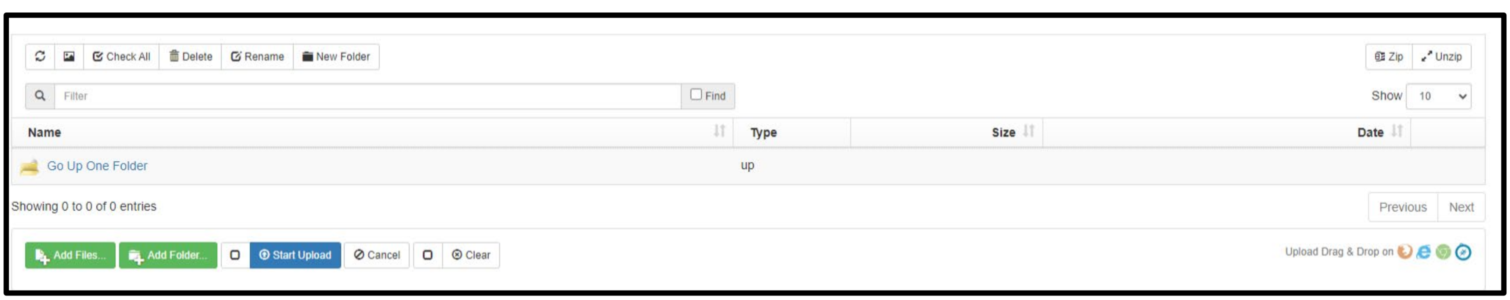
4. If users have already received access, they can enter a **User Name** and **Password** and click **Sign In**.

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



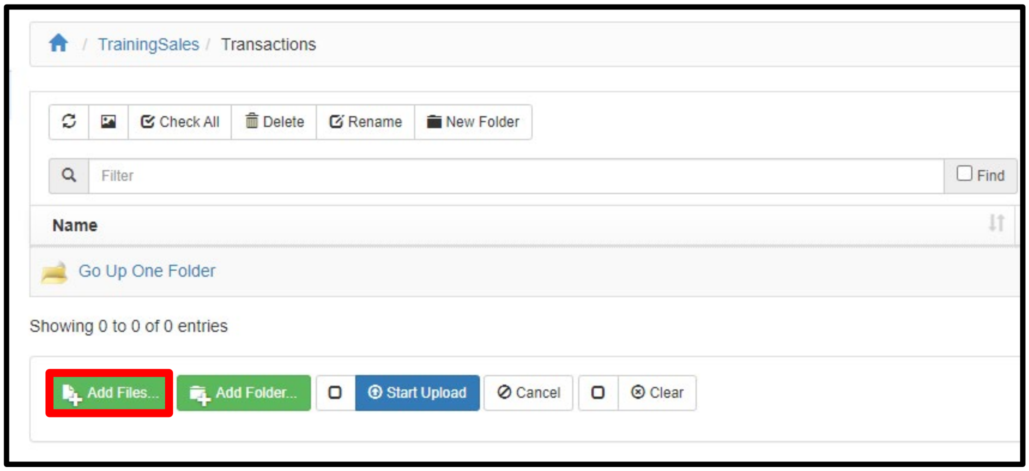
6. In this Demo, the user has folders for different types of Imports: **Refunds**, **Solicitations**, and **Transactions**.

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

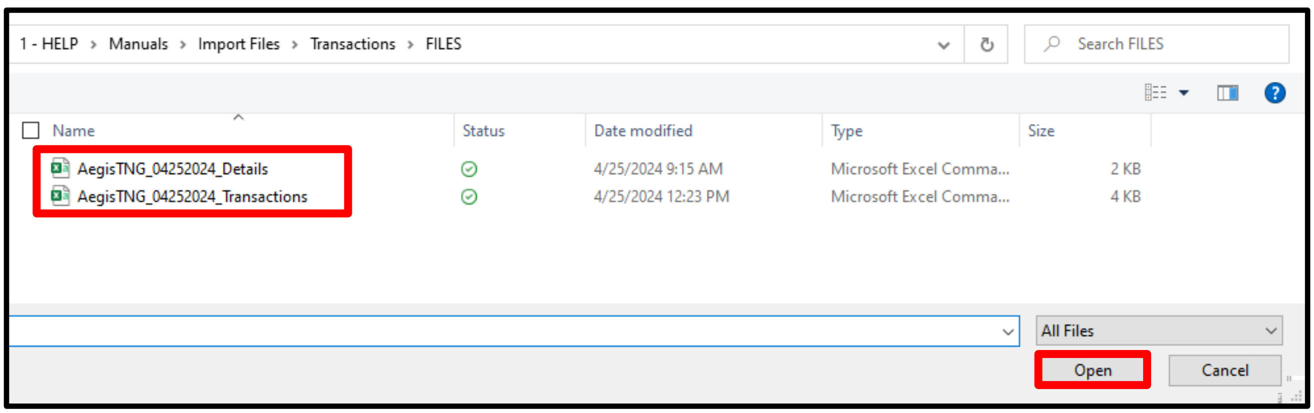


8. No files are currently uploaded.

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

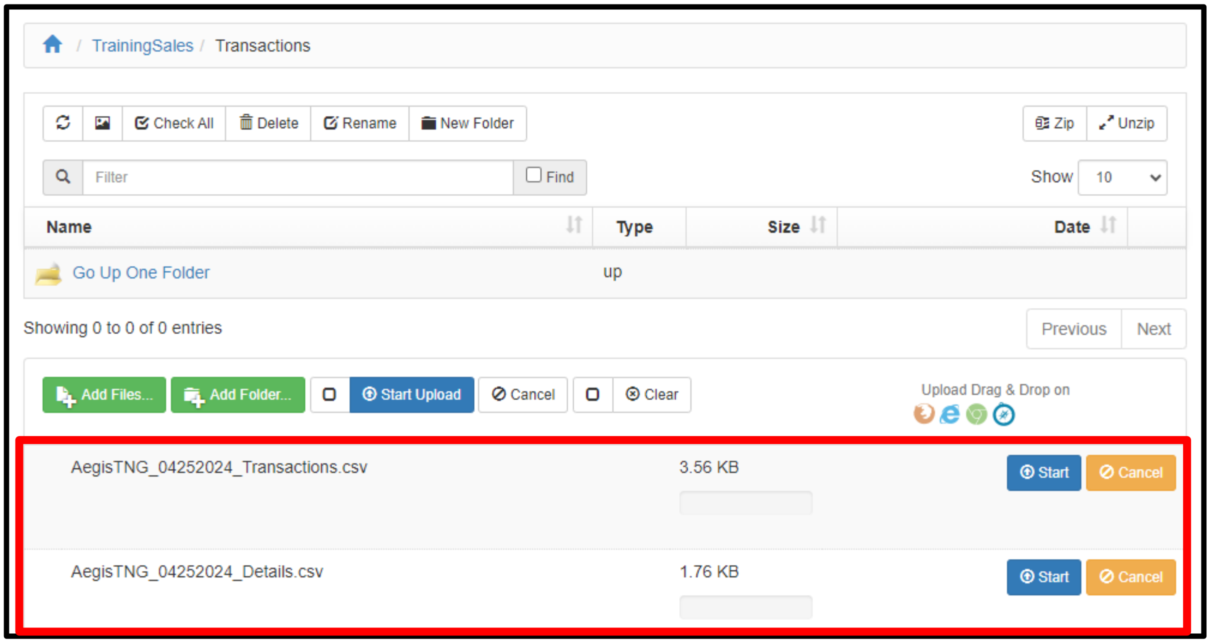


10. Users then **Browse** to the file location and select the desired **Files**.
    - In this scenario users must upload BOTH a **Details** and **Transactions** File.

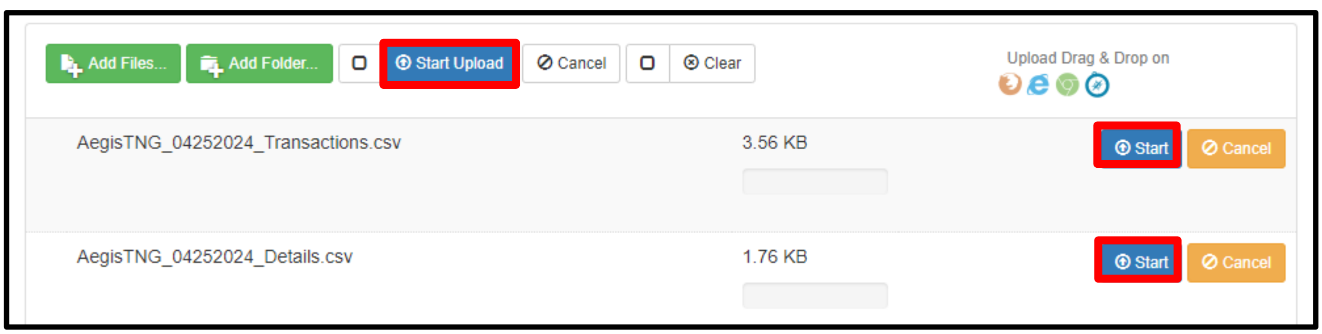


11. Click the **Open** button to Add the files.
    - Users can also Drag and Drop the files as desired.

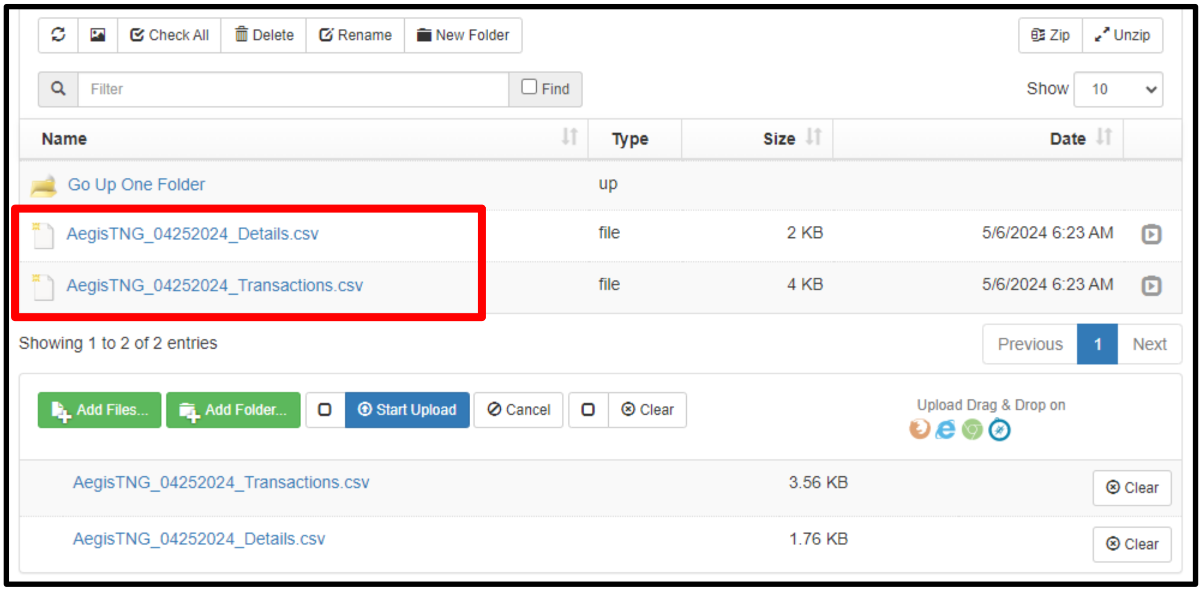
12. A **File Preview** will display below the Uploaded area.



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.



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.

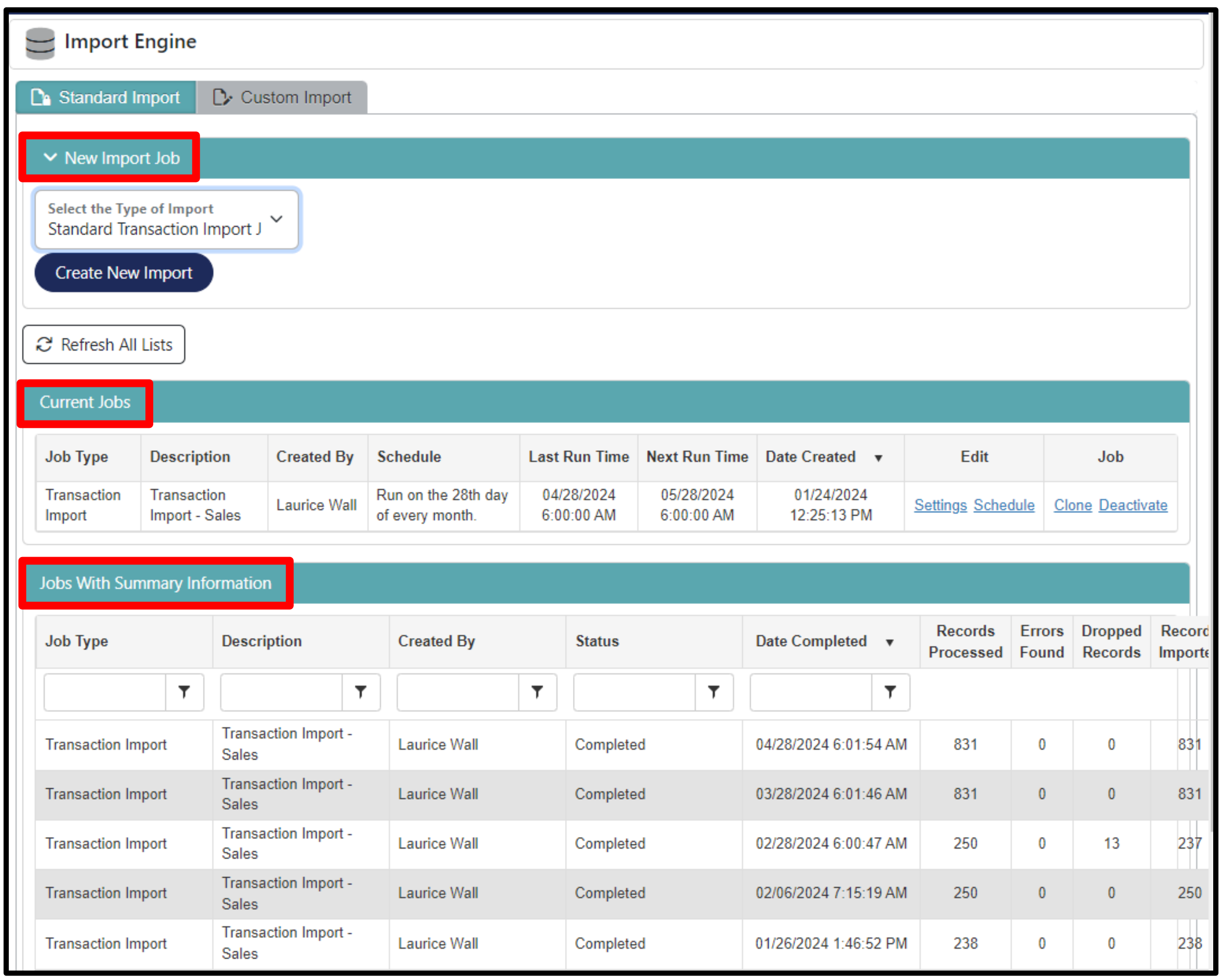
From this page users can interact with three sections: the **New Import Job**, **Current Jobs,** and **Jobs with Summary Information**.

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.



Current Jobs OVERVIEW

1. Click on the **Data Center** module, **Scheduled Imports** sub-module.

2. Click on the **Standard Import Tab**.

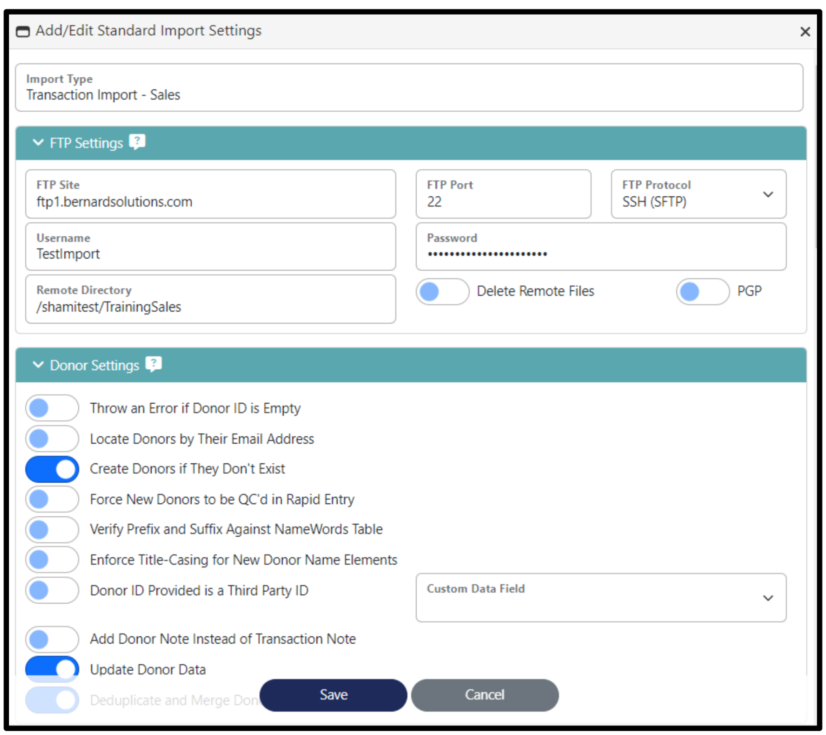
3. Observe the top, **Current Job** section – all current jobs are displayed here.
    - In this example a recurring Transaction Import job is displayed complete with columns:
        - Job Type
        - Description
        - Created By
        - Schedule
        - Last Run Time
        - Next Run Time
        - Date Created

Current Jobs

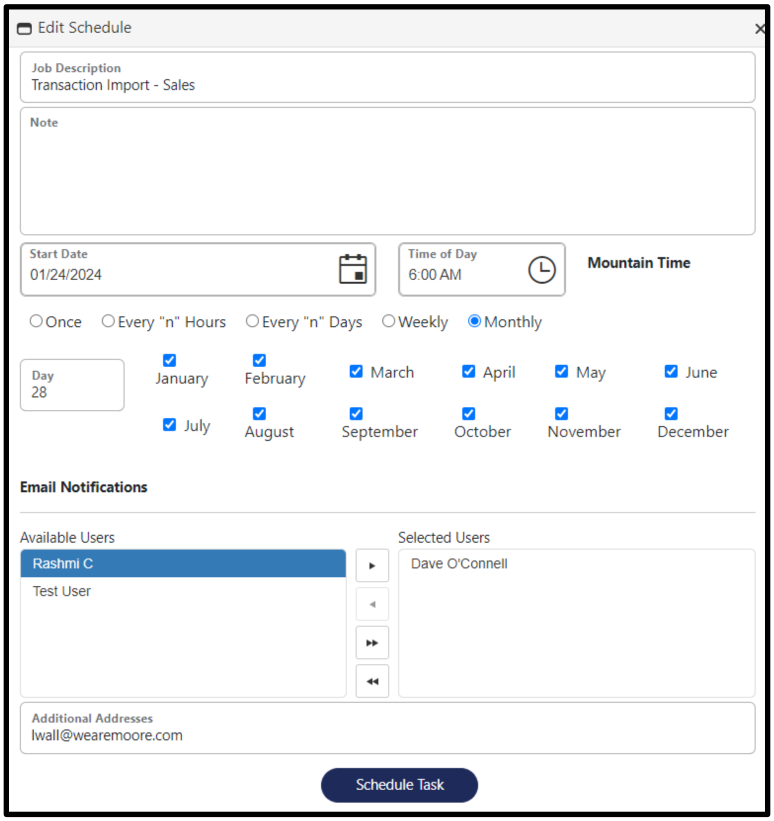
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Edit	Job
Transaction Import	Transaction Import - Sales	Laurice Wall	Run on the 28th day of every month.	04/28/2024 6:00:00 AM	05/28/2024 6:00:00 AM	01/24/2024 12:25:13 PM	Settings Schedule	Clone Deactivate

4. The FAR RIGHT TWO Columns enable users to **Edit** and modify the **Job**.

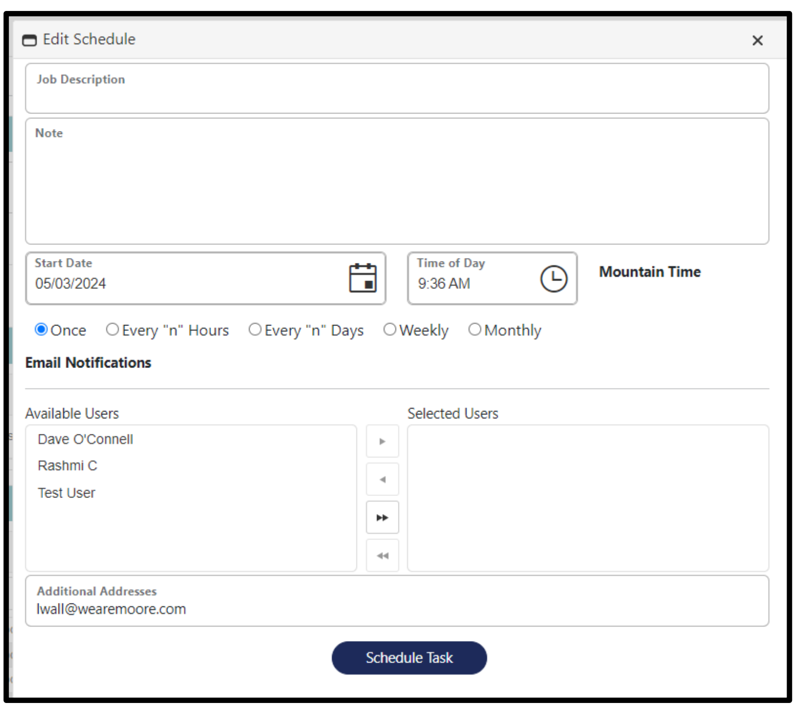
5. Clicking on the **Settings** link enables users to edit the **Import Settings** if desired.



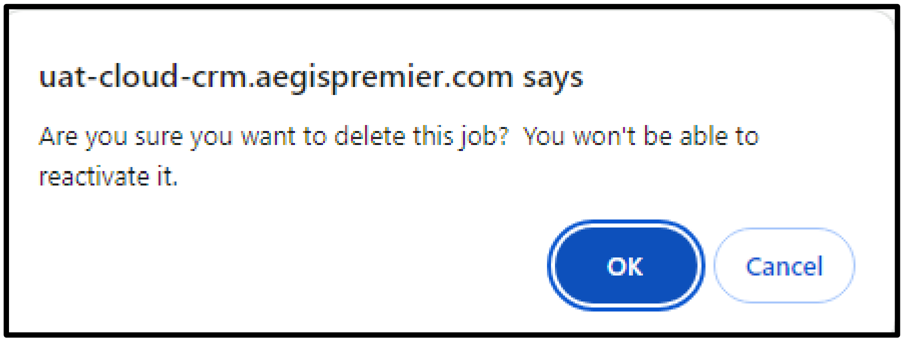
6. Clicking on the **Schedule** link enables users to edit the **Job's** timing if desired.



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.



8. Clicking on the **Deactivate** button ends the current Job's activity and ceases its Schedule.
    - NOTE the clearly indicated warning – **<u>You WON'T be able to reactivate it</u>**.



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	?

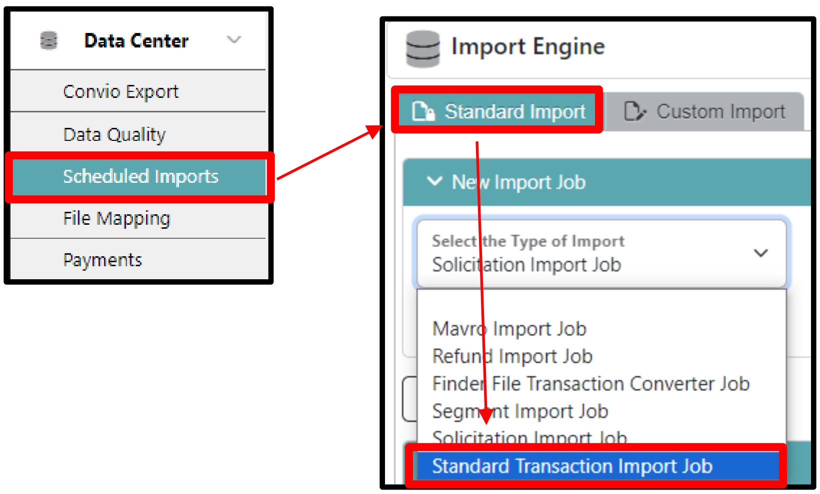
4. At the END of each row is an information icon – ? – which when clicked displays Summary information regarding the job:

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.



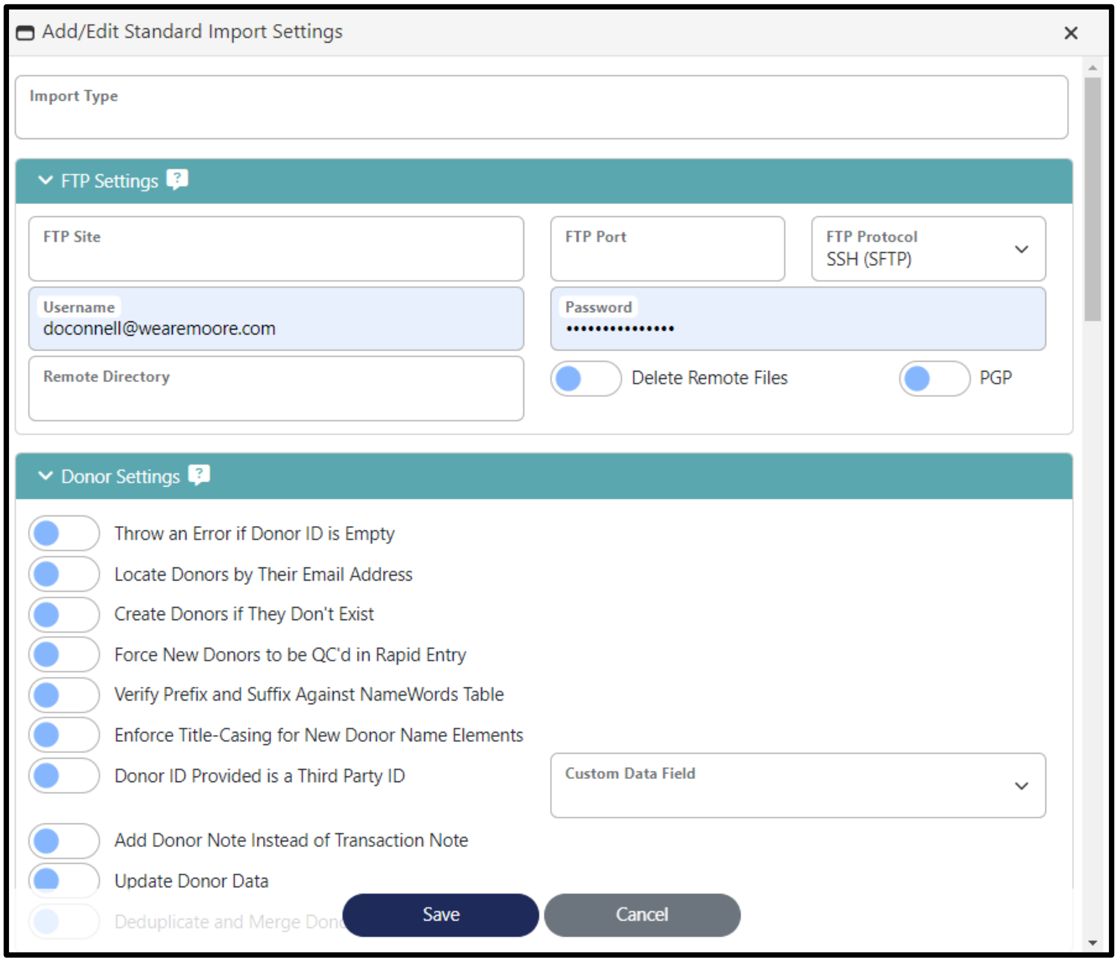
Standard Transaction Imports enable users to import Transactions that are taken client via third-party software. The import then ties the Transaction details to an existing Appeal Campaign/Record created INSIDE the Aegis CRM.

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.



5. Users should <u>review each of the Import Setting sections on the following pages</u> for a **Standard Transaction Import**.
   - The most common fields are highlighted & used in the screen examples.

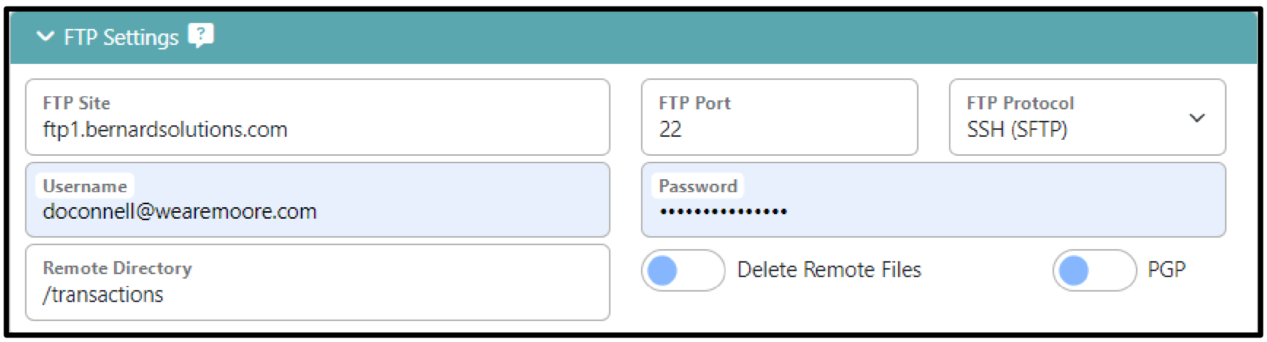
Import Type

Import Type is where user should provide a <u>unique name</u> by which they will recognize the Job.

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.



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.

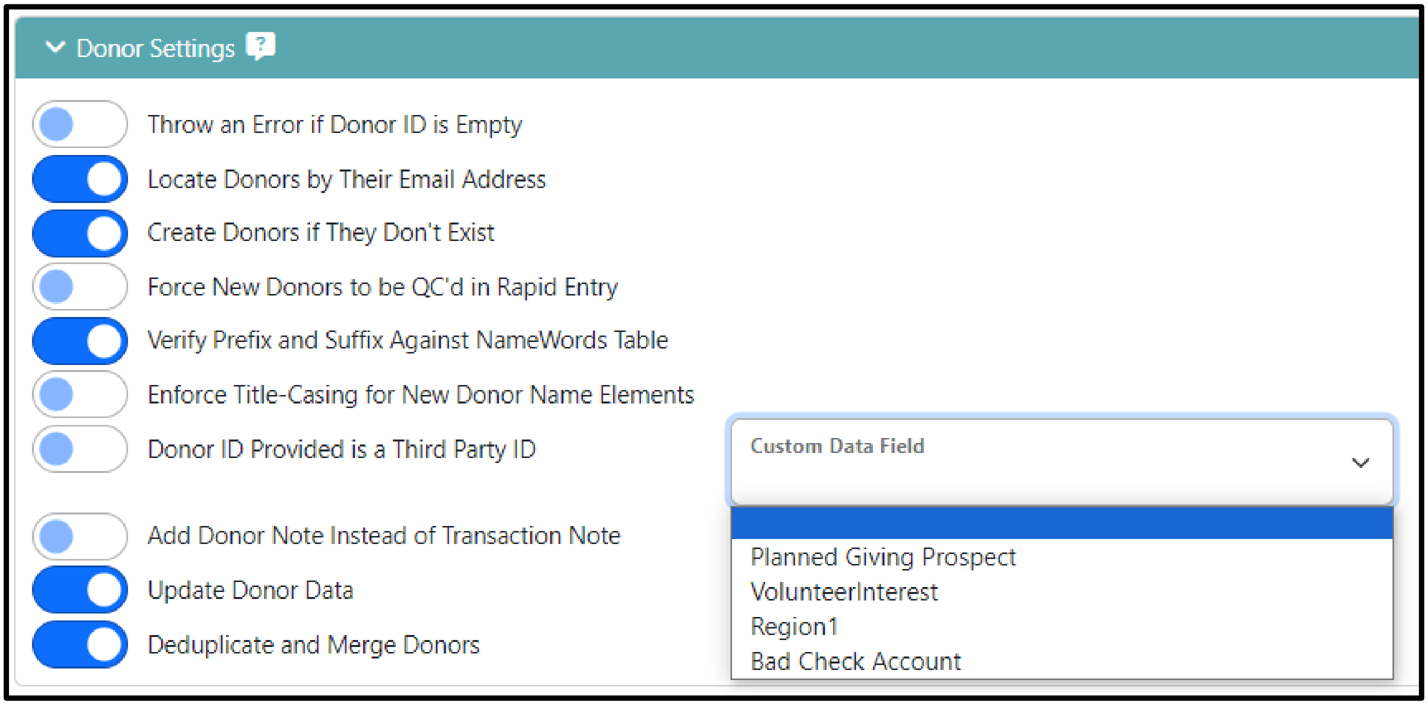
FTP Protocol = **SSH (SFTP)**

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.



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 3rd 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.

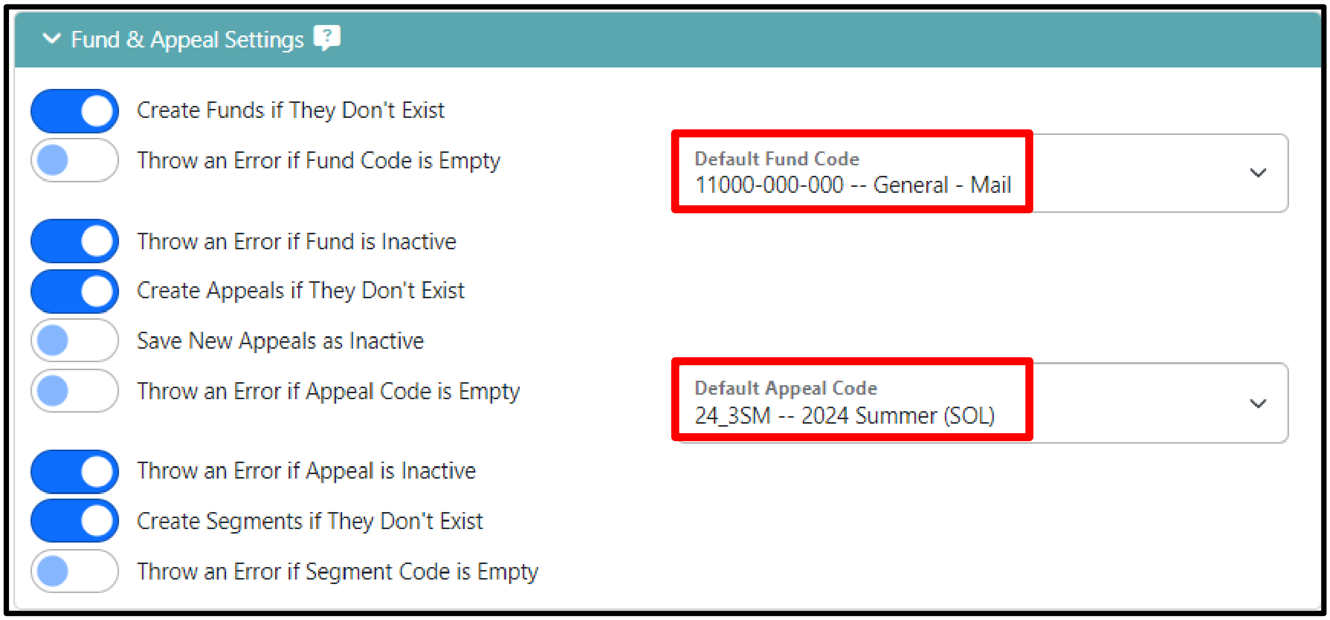
Update Donor Data – Updates and/or overwrites existing data with whatever data is being imported. Used if client decides to flatly accept imported data as the most recent data for the Donor. Often.

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 – 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.

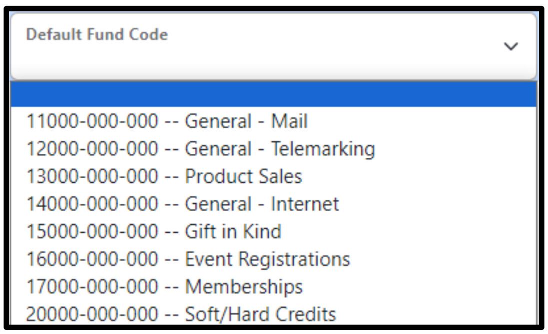
Throw an Error if Appeal Code is Empty – IF an imported Transaction's listed Appeal Code does NOT have a value, an error will be thrown. Users would have to be confident of ALWAYS having an Appeal Code to Import. NOT Often.

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.

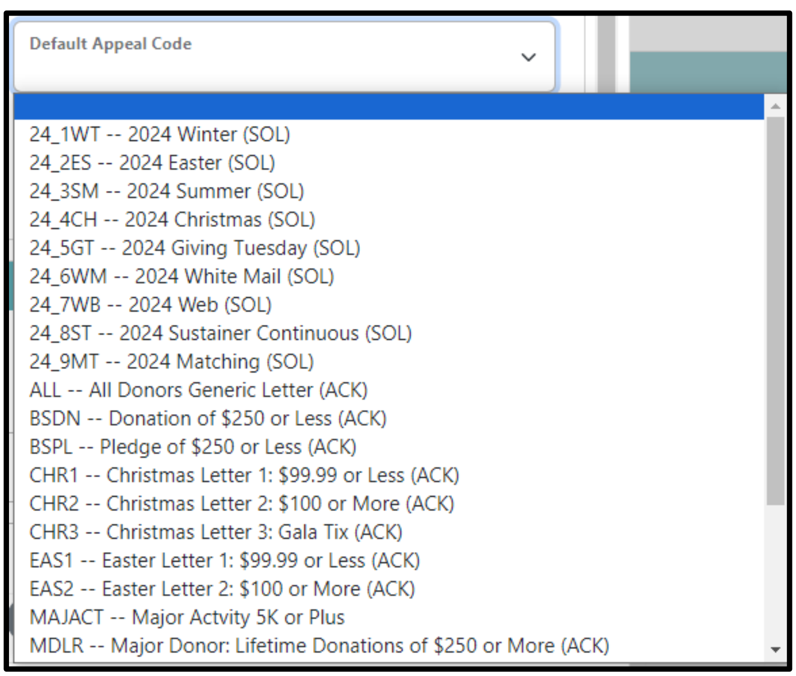
Create Segments if They Don't Exist – Segments loaded will be labeled, "Created by Aegis Imports, please update." Often.

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.

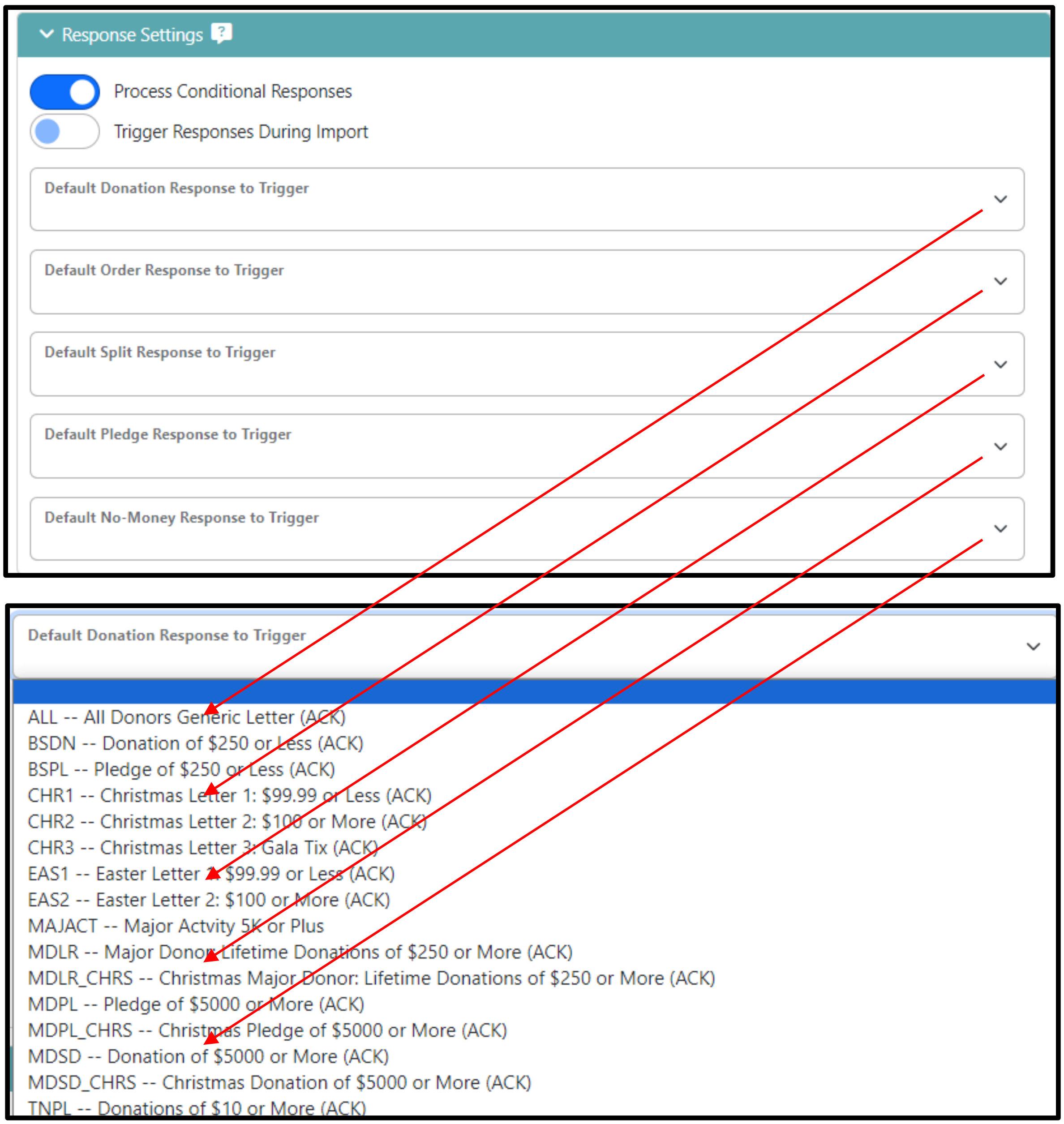


Response Settings

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.

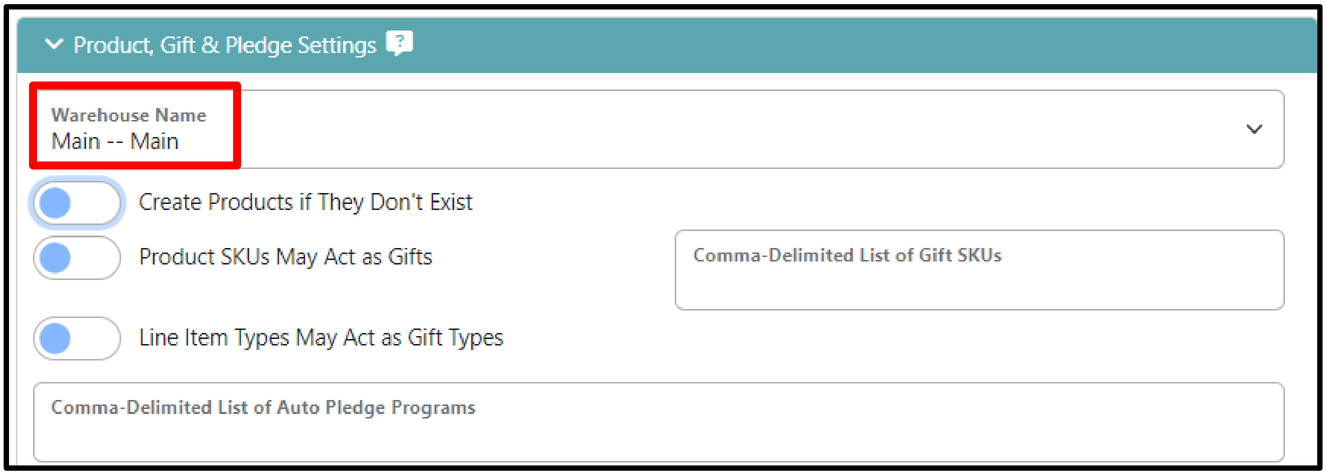
In MOST scenarios, users would want the **Process Conditional Responses** toggle selected so as to leverage the Appeal Acknowledgement ability to set up Conditional Acknowledgements.

The Trigger Responses during Import would force users to…



Product, Gift, & Pledge Settings

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



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.

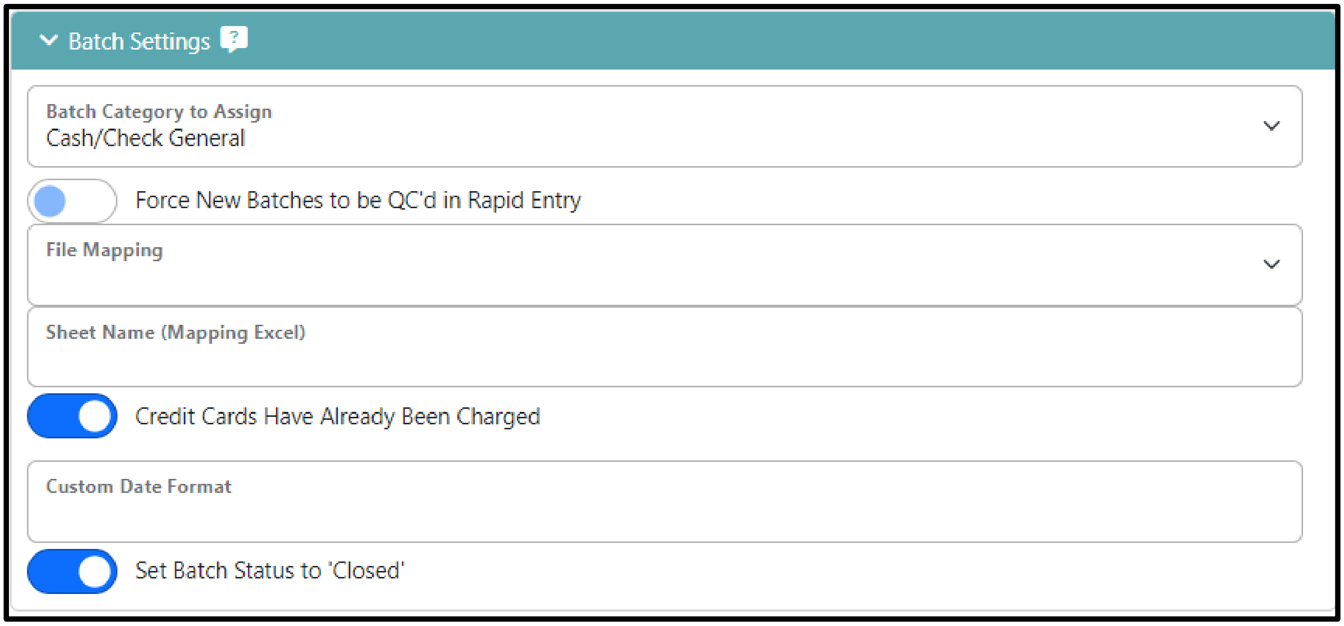
Line-Item Types May Act as Gift Types – Enables Line-Item Types to act as Gift Types when imported. NOT Often.

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.

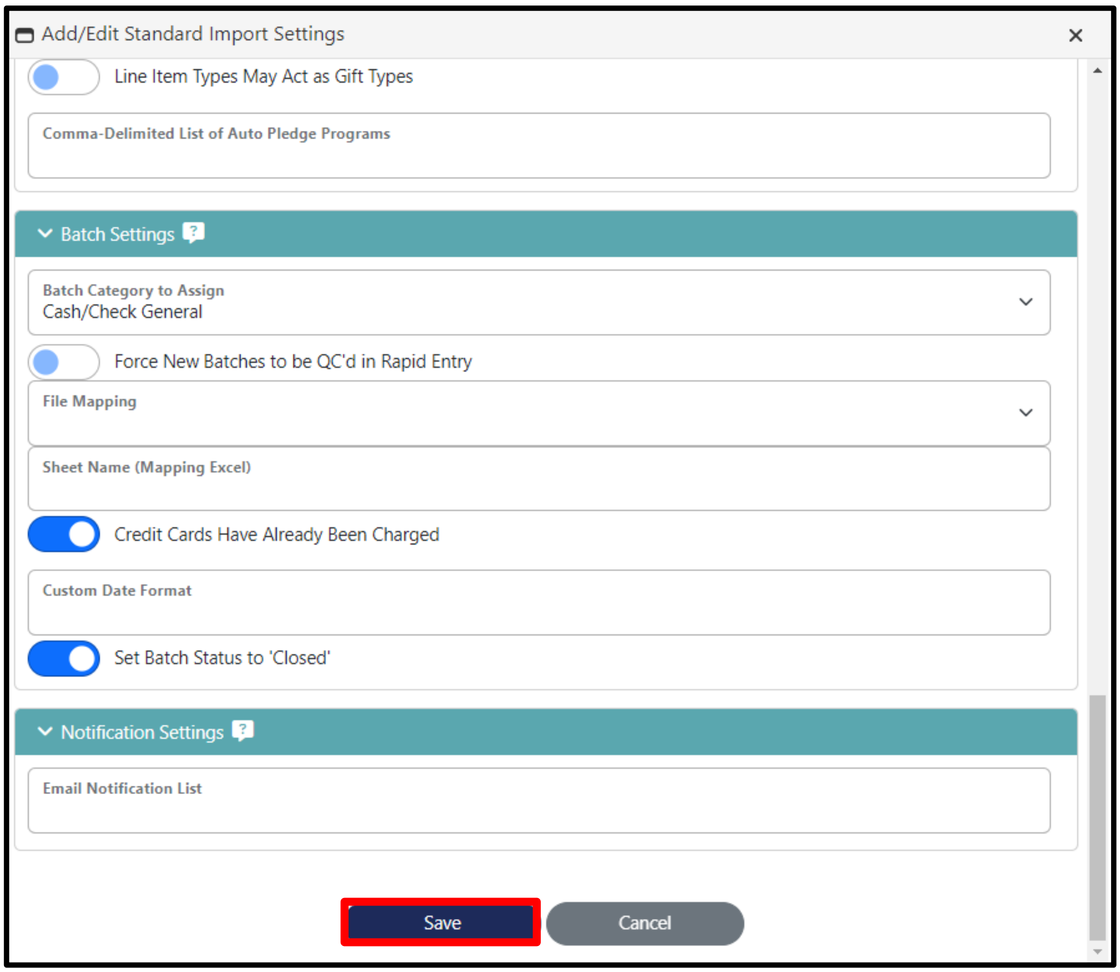
Credit Cards Have Already Been Charged – Toggled on would indicate the Donor's Card has already been charged for Transaction and should NOT be charged in the CRM once imported. Often.

Custom Date Format -

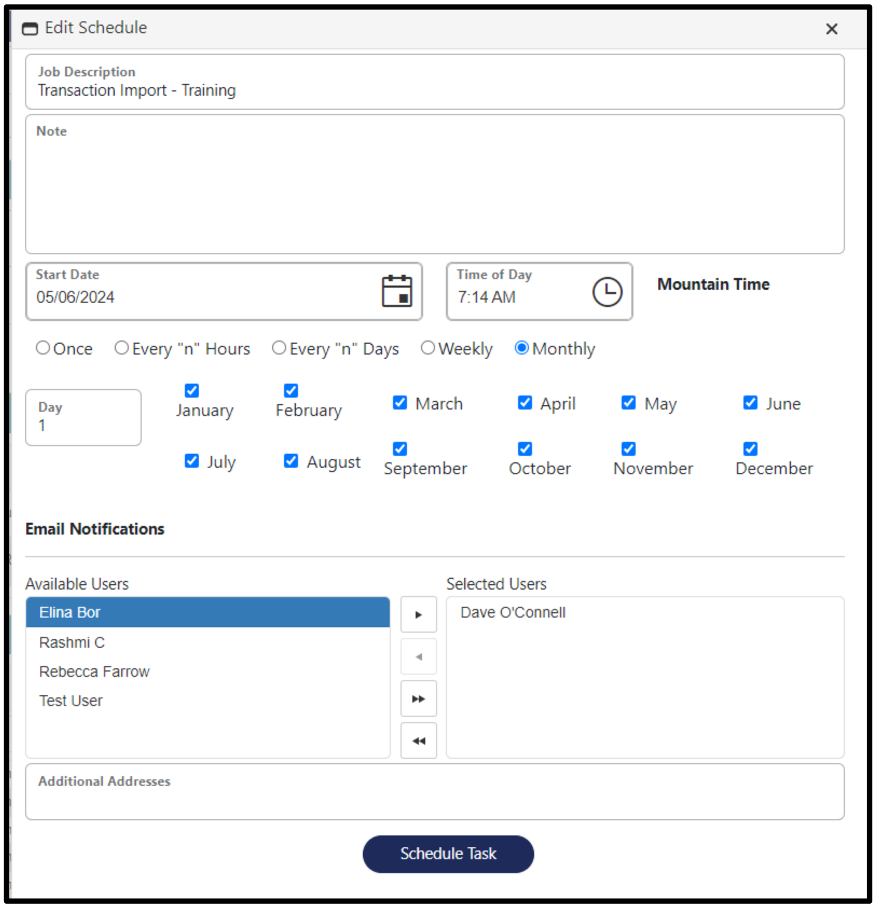
Set Batch Status to 'Closed' – Would Close the Batch so visible and able to be processed in the CRM. Often.

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.

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



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.

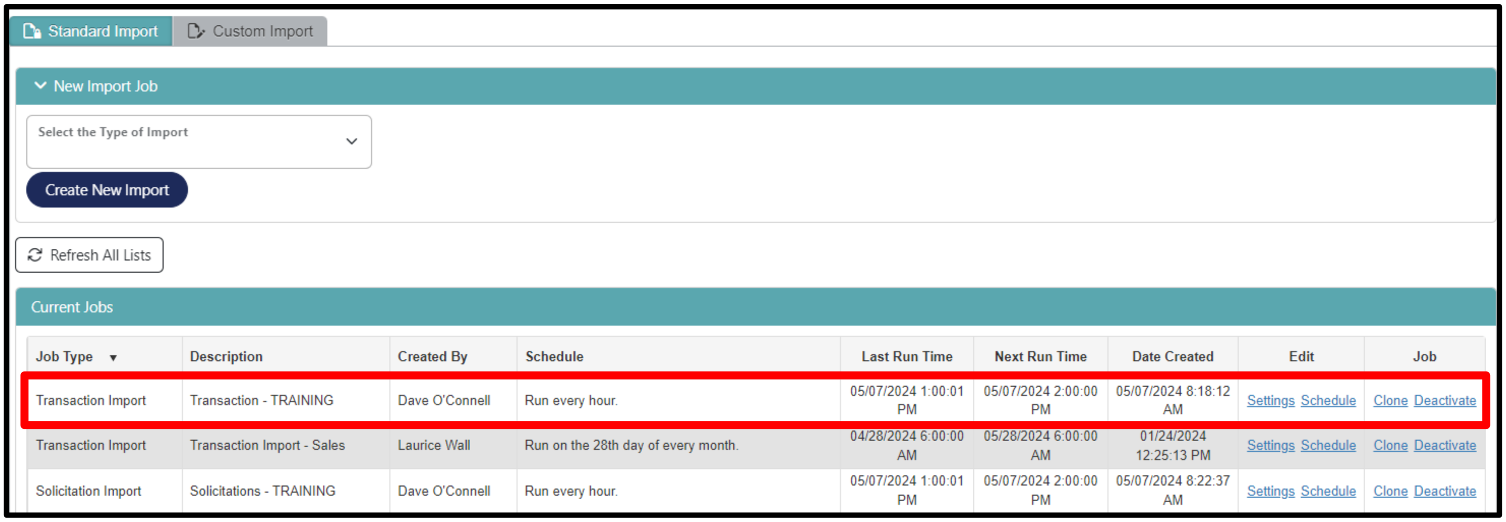
- If **Hours** or **Days** option chosen then **Increment** field completed.
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

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.

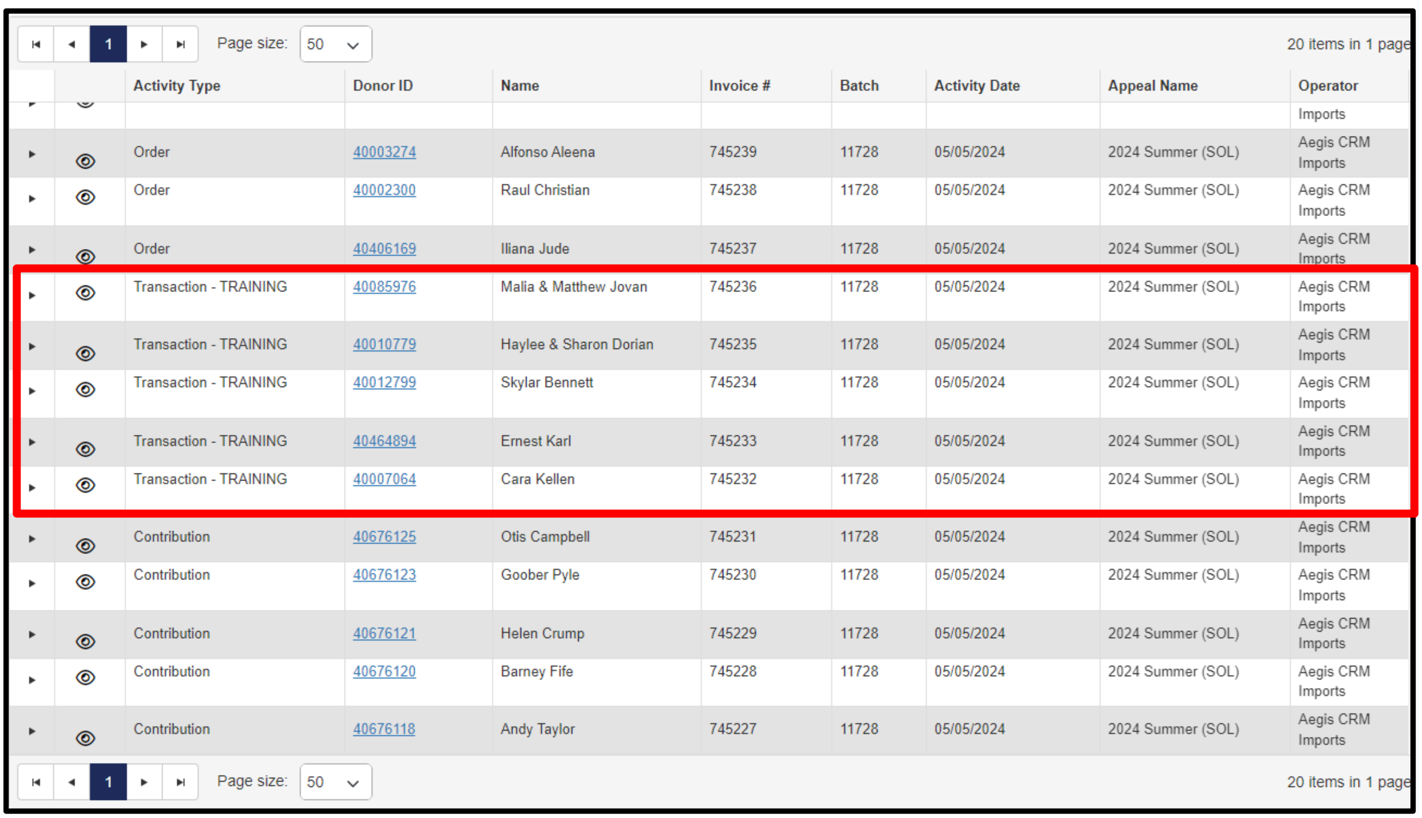
8. Click on **Schedule Task**.

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



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	Settings Schedule	Clone Deactivate
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	Settings Schedule	Clone Deactivate
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	Settings Schedule	Clone Deactivate

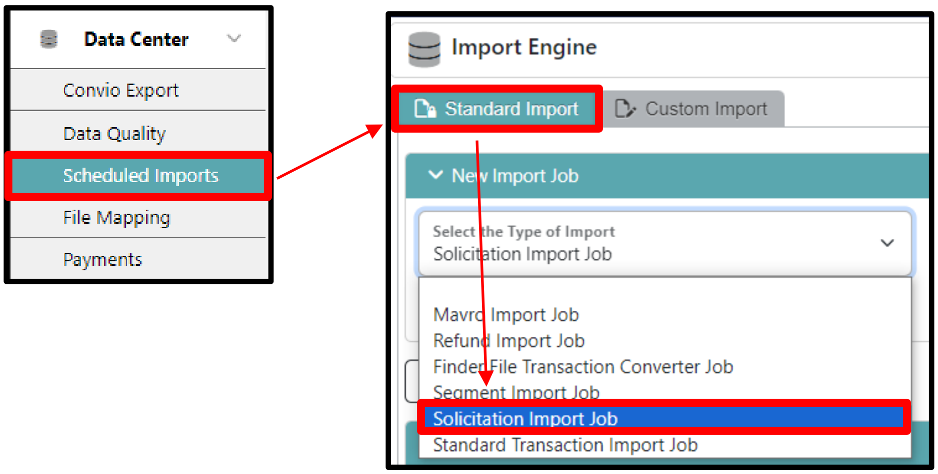
10. Users can also navigate to the **Donors** Module, **Locate Transaction** sub-module and search by the Import Dates to display the imported transactions.



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

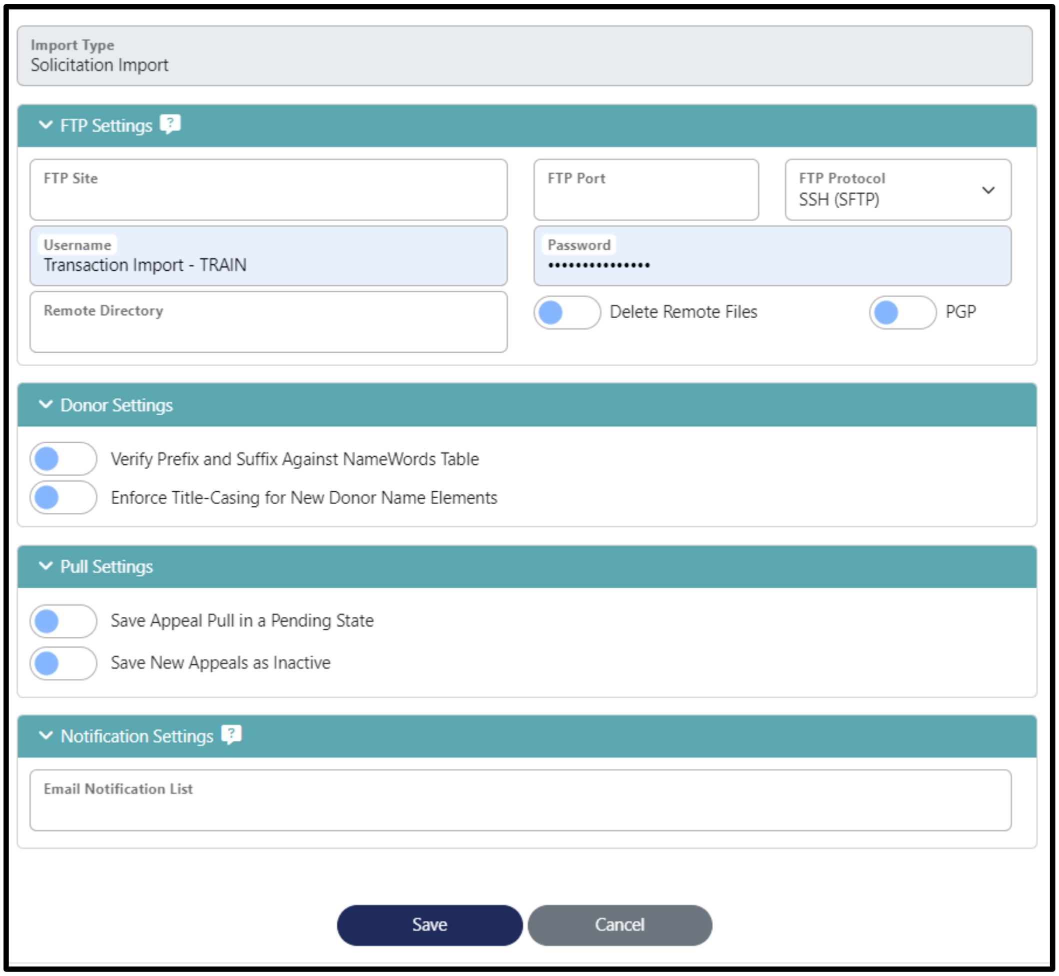


Solicitation Imports enable users to import all the details of an Appeal Campaign created OUTSIDE of the Aegis CRM. This import would build all relevant records: Donors, Appeals, Transactions, Batches, etc. in the CRM.

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.



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.

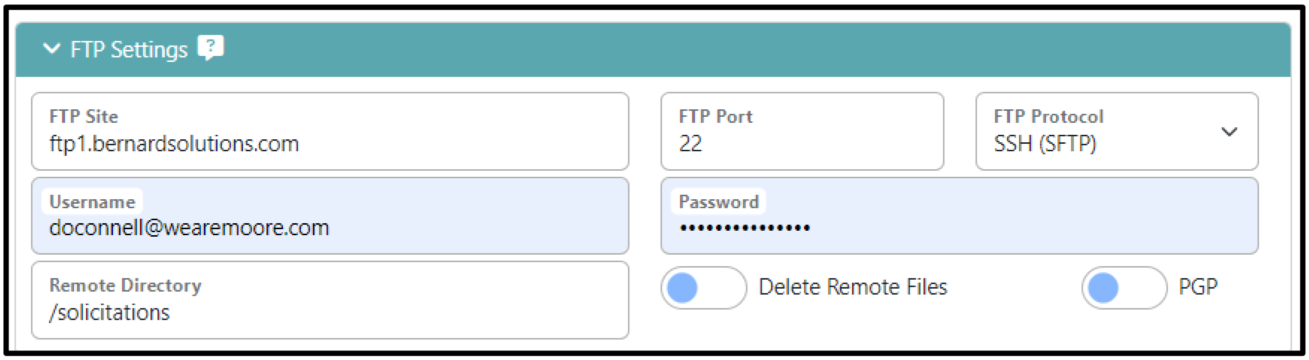
Import Type

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

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.



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.

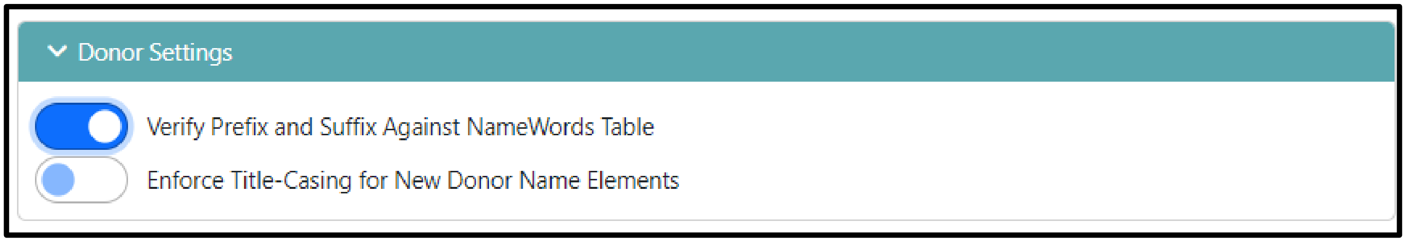
FTP Protocol = **SSH (SFTP)**

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.

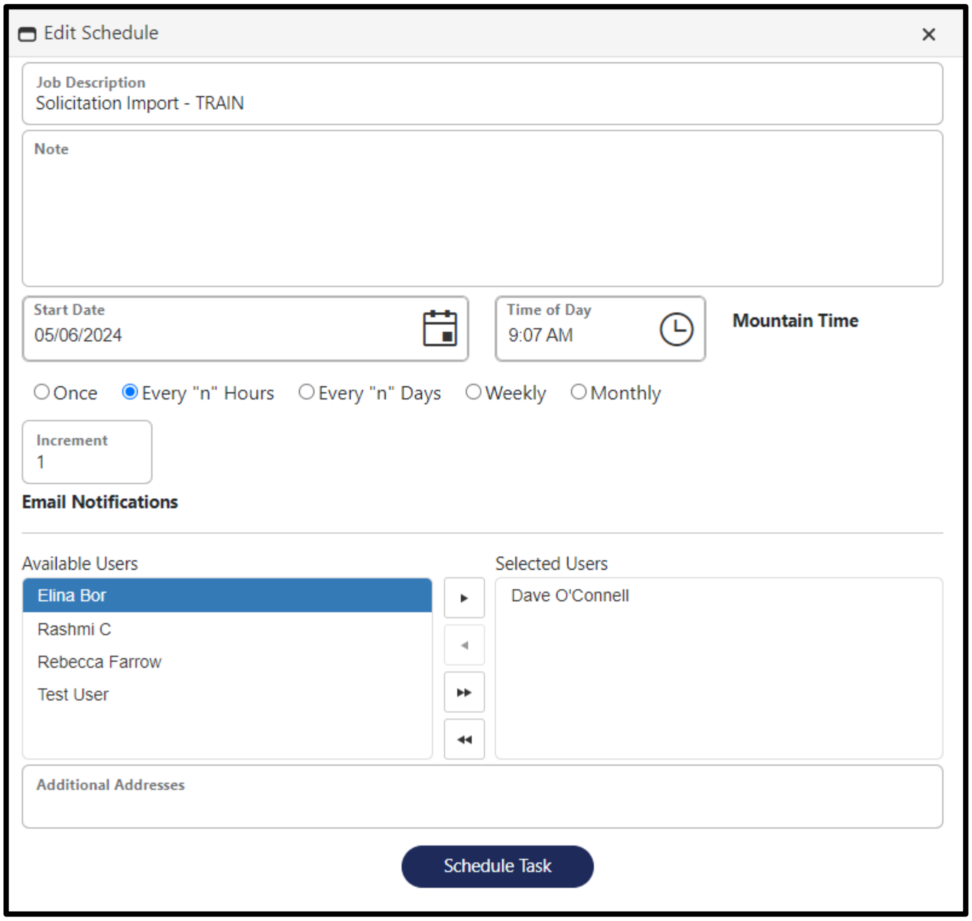
Notification Settings

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.

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.

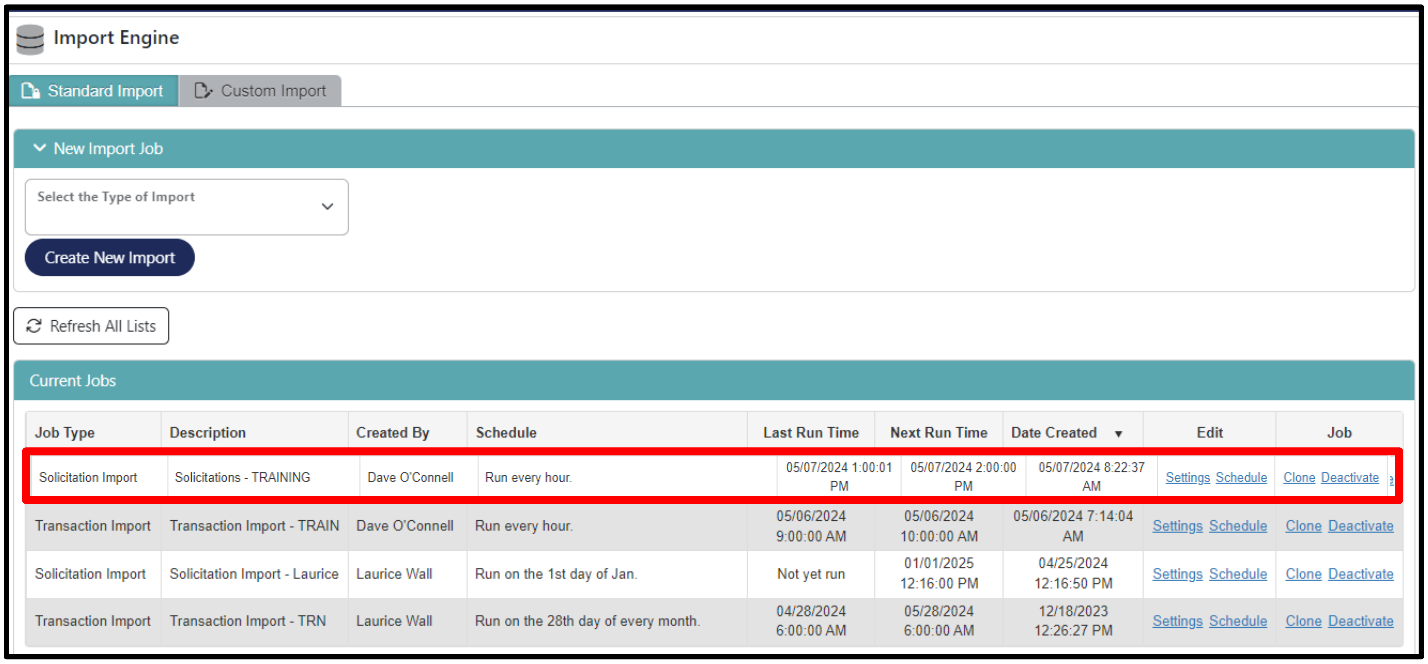
- If **Hours** or **Days** option chosen then **Increment** field completed.
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

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.

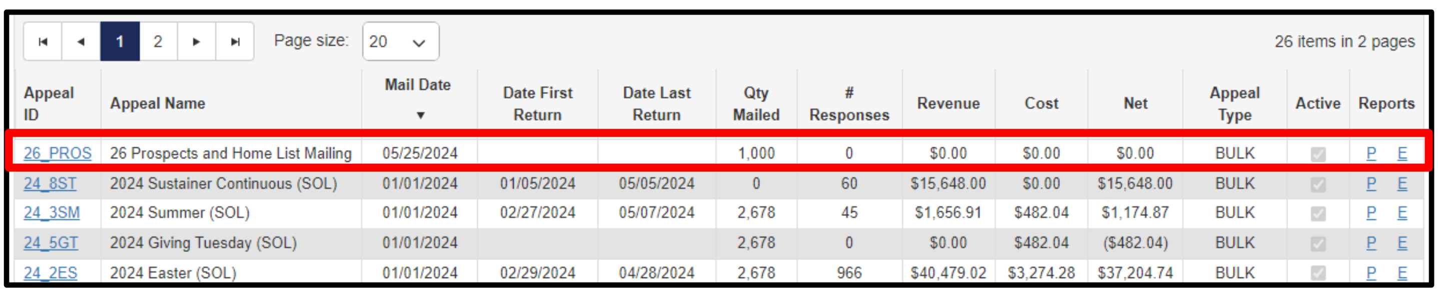
13. Click on **Schedule Task.**

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



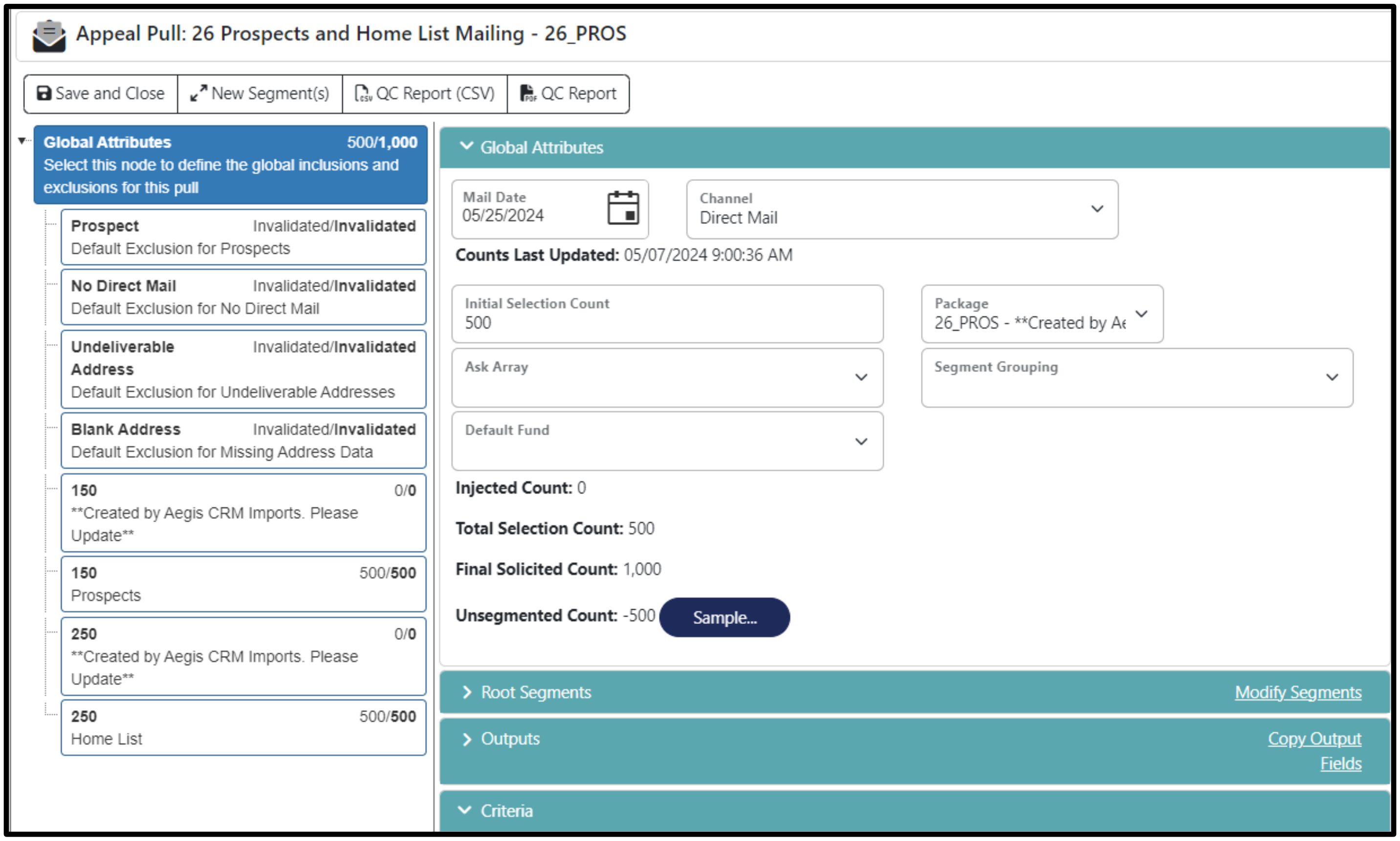
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created	Edit	Job
Solicitation Import	Solicitations - TRAINING	Dave O'Connell	Run every hour.	05/07/2024 1:00:01 PM	05/07/2024 2:00:00 PM	05/07/2024 8:22:37 AM	Settings Schedule	Clone Deactivate
Transaction Import	Transaction Import - 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	Settings Schedule	Clone Deactivate
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	Settings Schedule	Clone Deactivate
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	Settings Schedule	Clone Deactivate

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



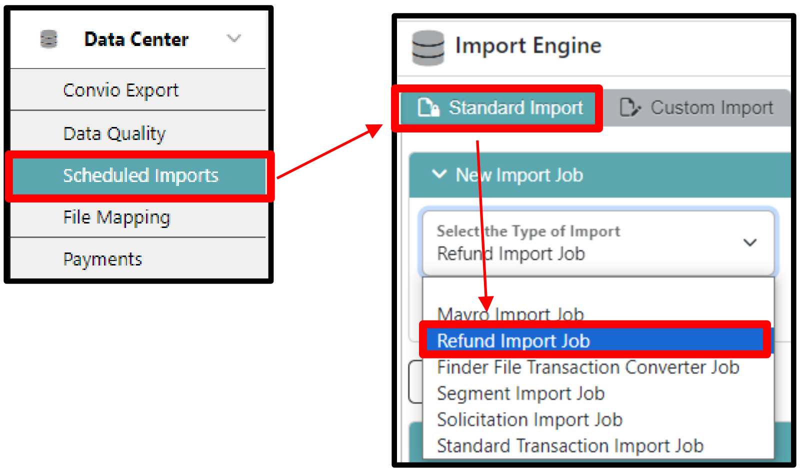
Appeal ID	Appeal Name	Mail Date	Date First Return	Date Last Return	Qty Mailed	# Responses	Revenue	Cost	Net	Appeal Type	Active	Reports
26_PROS	26 Prospects and Home List Mailing	05/25/2024			1,000	0	$0.00	$0.00	$0.00	BULK		P E
24_8ST	2024 Sustainer Continuous (SOL)	01/01/2024	01/05/2024	05/05/2024	0	60	$15,648.00	$0.00	$15,648.00	BULK		P E
24_3SM	2024 Summer (SOL)	01/01/2024	02/27/2024	05/07/2024	2,678	45	$1,656.91	$482.04	$1,174.87	BULK		P E
24_5GT	2024 Giving Tuesday (SOL)	01/01/2024			2,678	0	$0.00	$482.04	($482.04)	BULK		P E
24_2ES	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		P E

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



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.

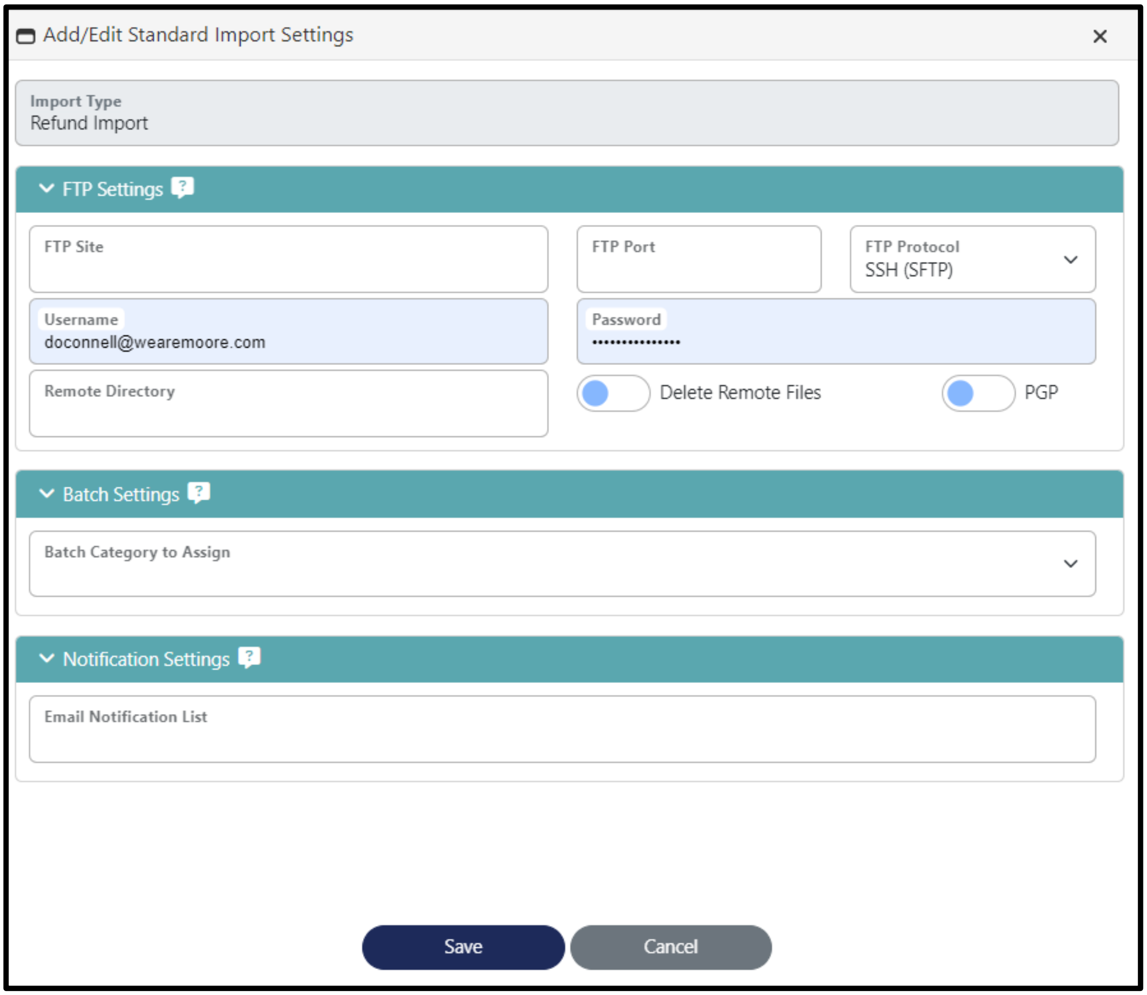
Refund Import STEPS

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.



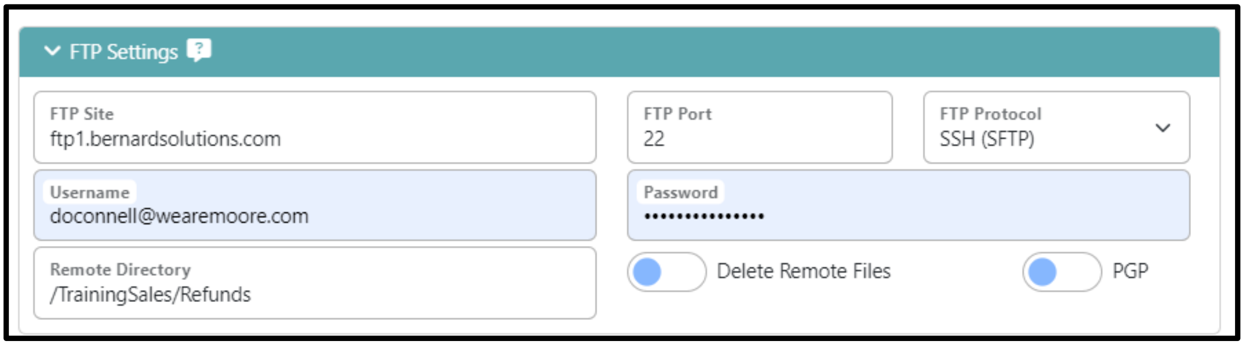
Import Type

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

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.



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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.
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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.

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

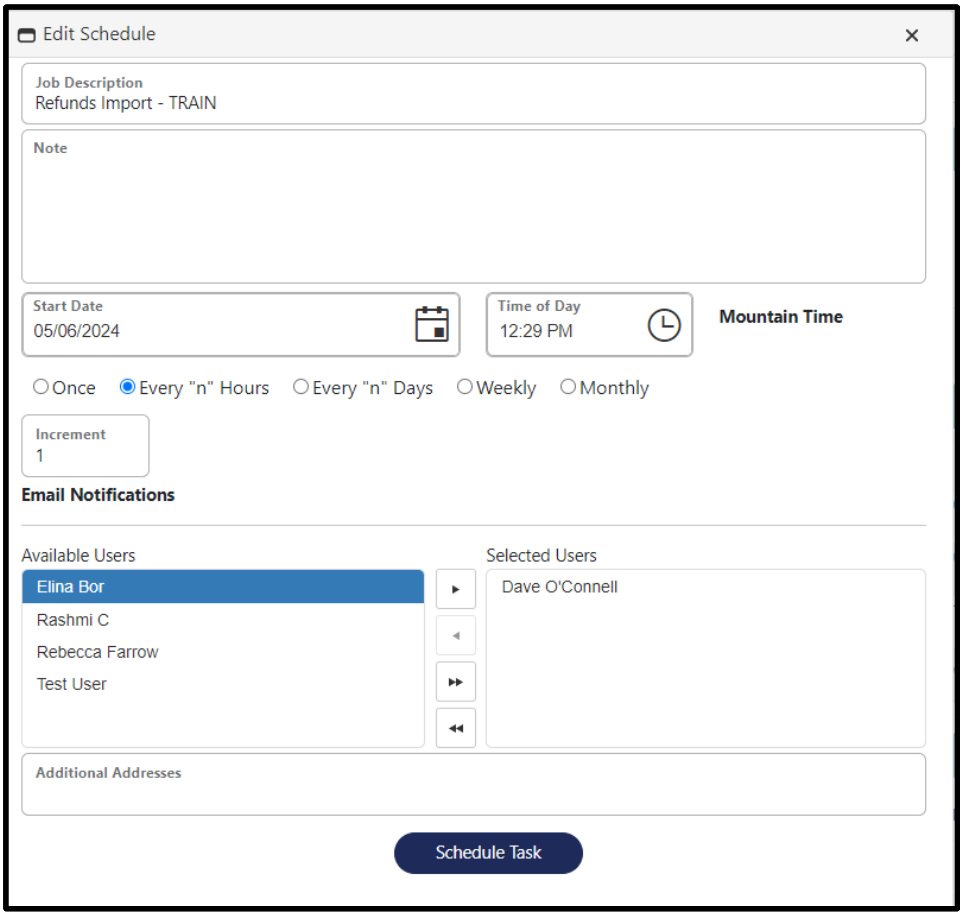
Notification Settings

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.

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.

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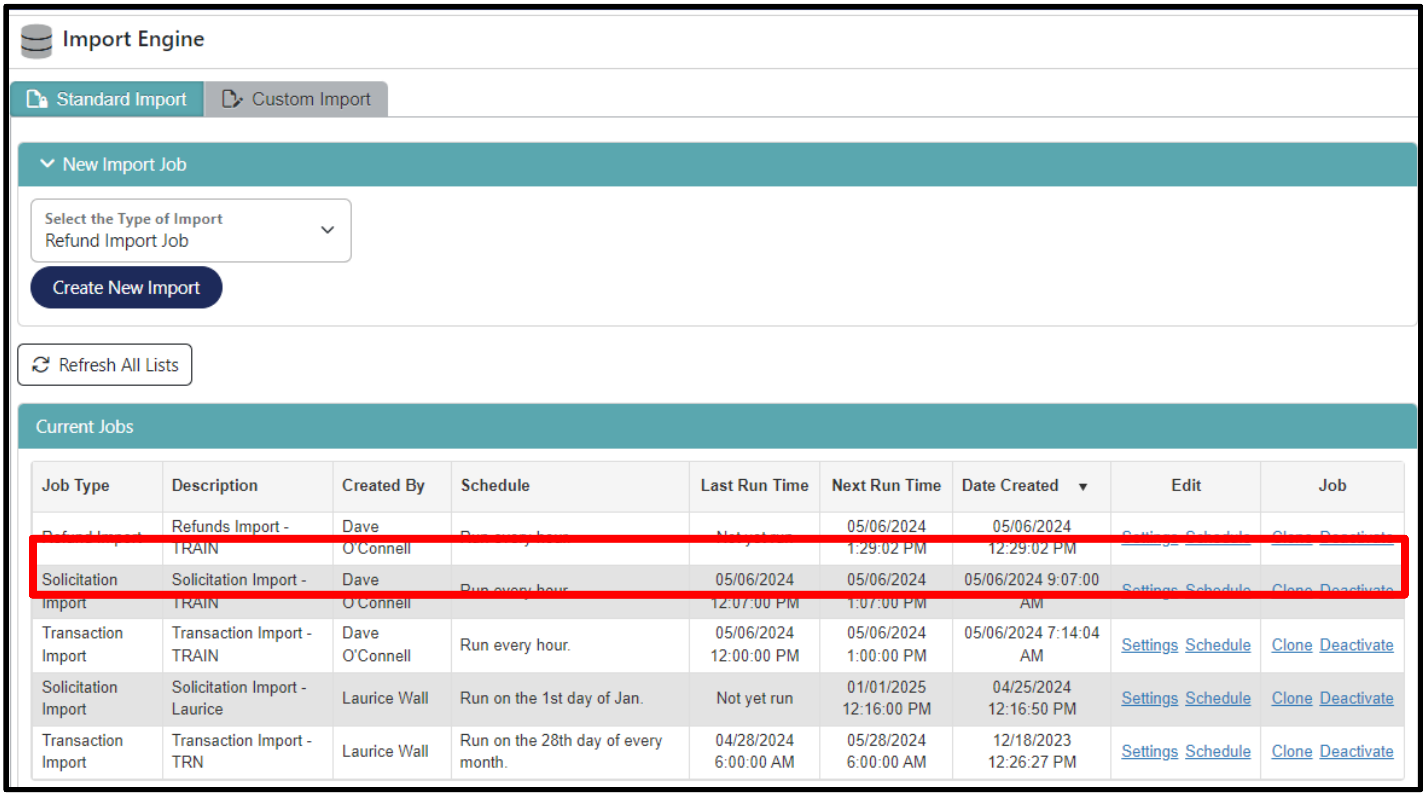
- If **Weekly** chosen, then **Day** of the Week selected.
- If **Monthly** chosen, then **Day** of Month and **Months** selected. (EXAMPLE)

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.

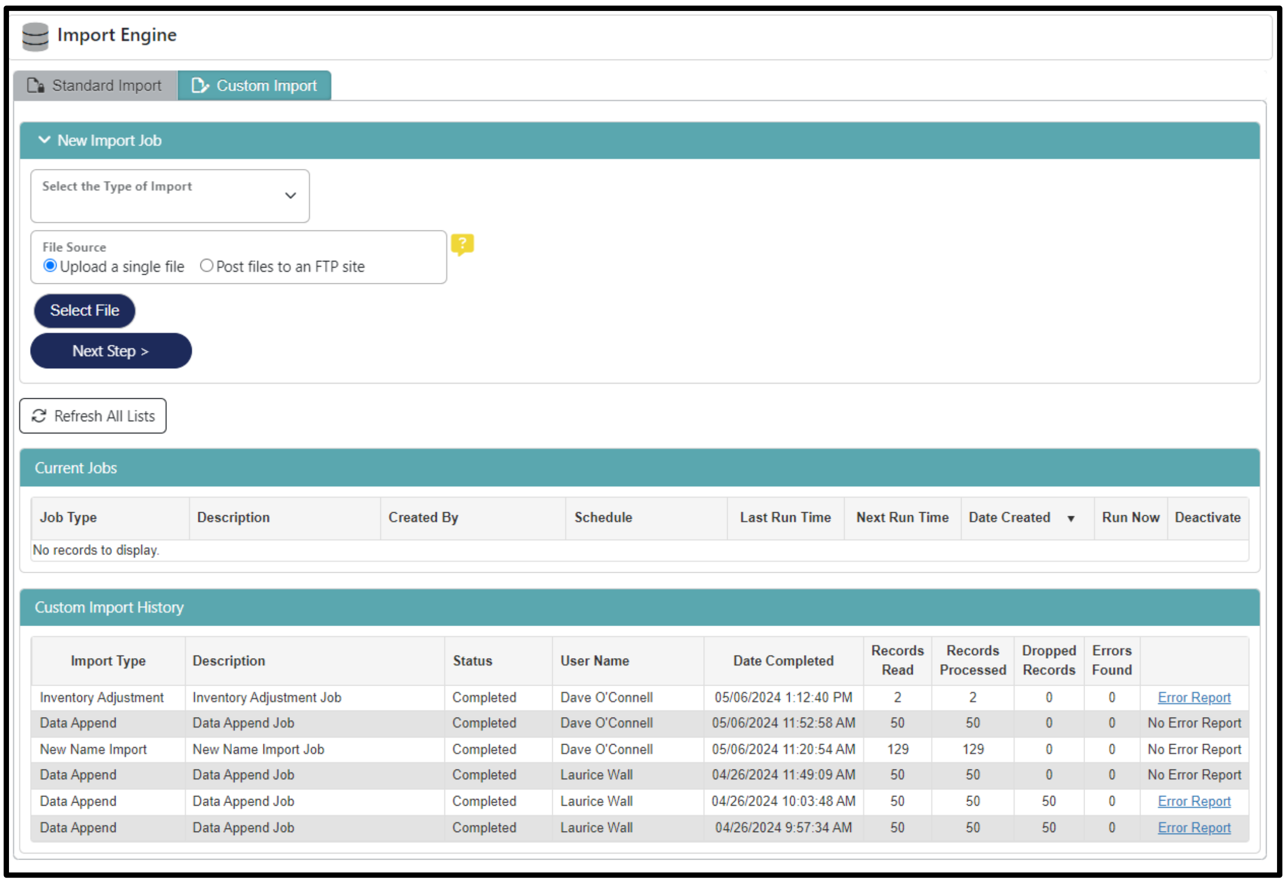


Custom Import Jobs LANDING PAGE

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	Error Report
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	Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	Error Report

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.

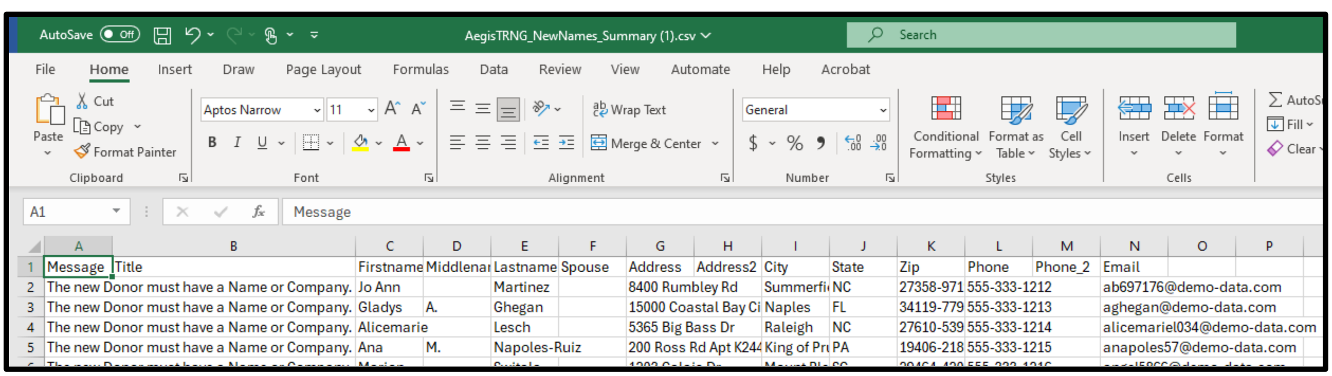
2. Click on the **Custom Import Tab**.

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

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	Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	Error Report

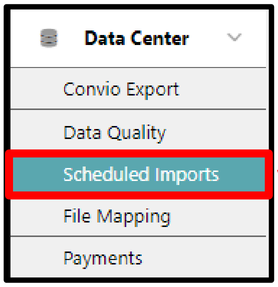
4. Clicking on an **Error Report** link will send an Excel file summary to the downloadable area of the browser. Users can then click or download that file to read the results. BELOW is an example of an Error Report re: missing Donor Names or Company from an attempted New Names import.

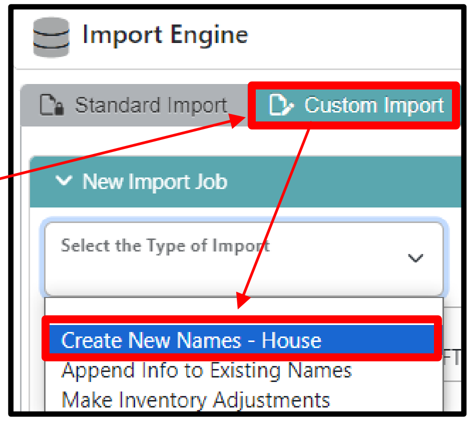


	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Message	Title	Firstname	Middlenai	Lastname	Spouse	Address	Address2	City	State	Zip	Phone	Phone_2	Email
2	The new Donor must have a Name or Company.		Jo Ann		Martinez		8400 Rumbley Rd		Summerfi	NC	27358-971	555-333-1212		ab697176@demo-data.com
3	The new Donor must have a Name 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		alicemariel034@demo-data.com
5	The new Donor must have a Name or Company.		Ana	M.	Napoles-Ruiz		200 Ross Rd Apt K244		King of Pru	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.

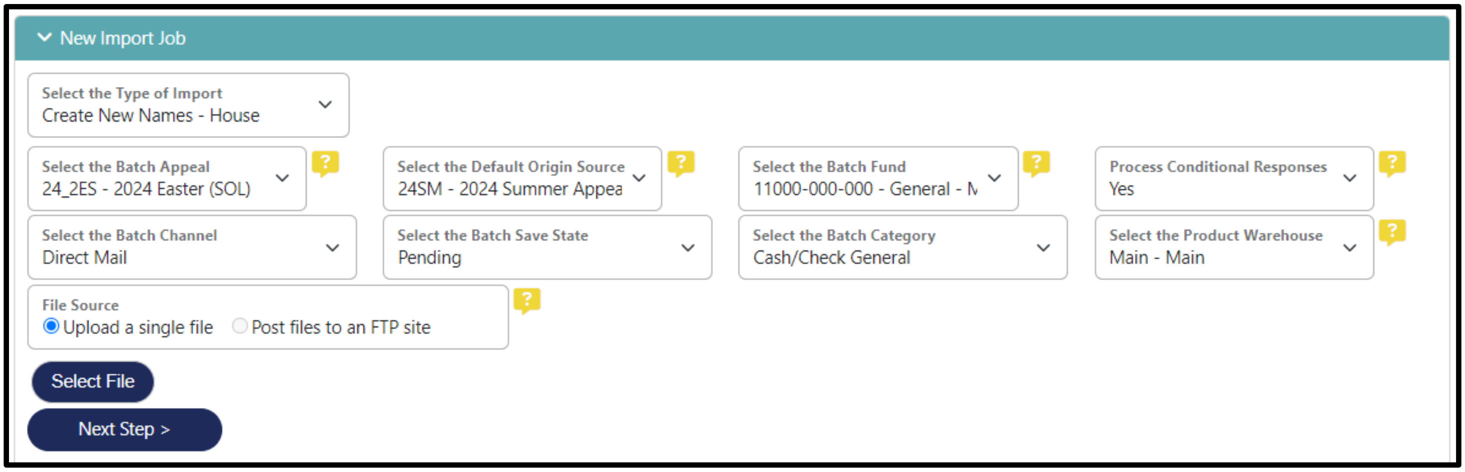
Importing a List of Names STEPS

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.



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.

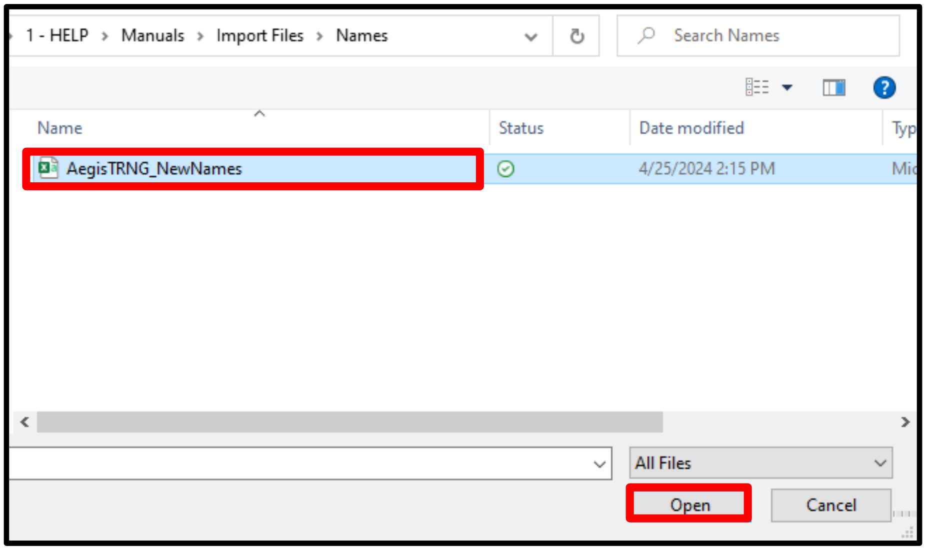
Select the Batch Category – Users can select the Batch Category to which they would like to associate the import.

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:

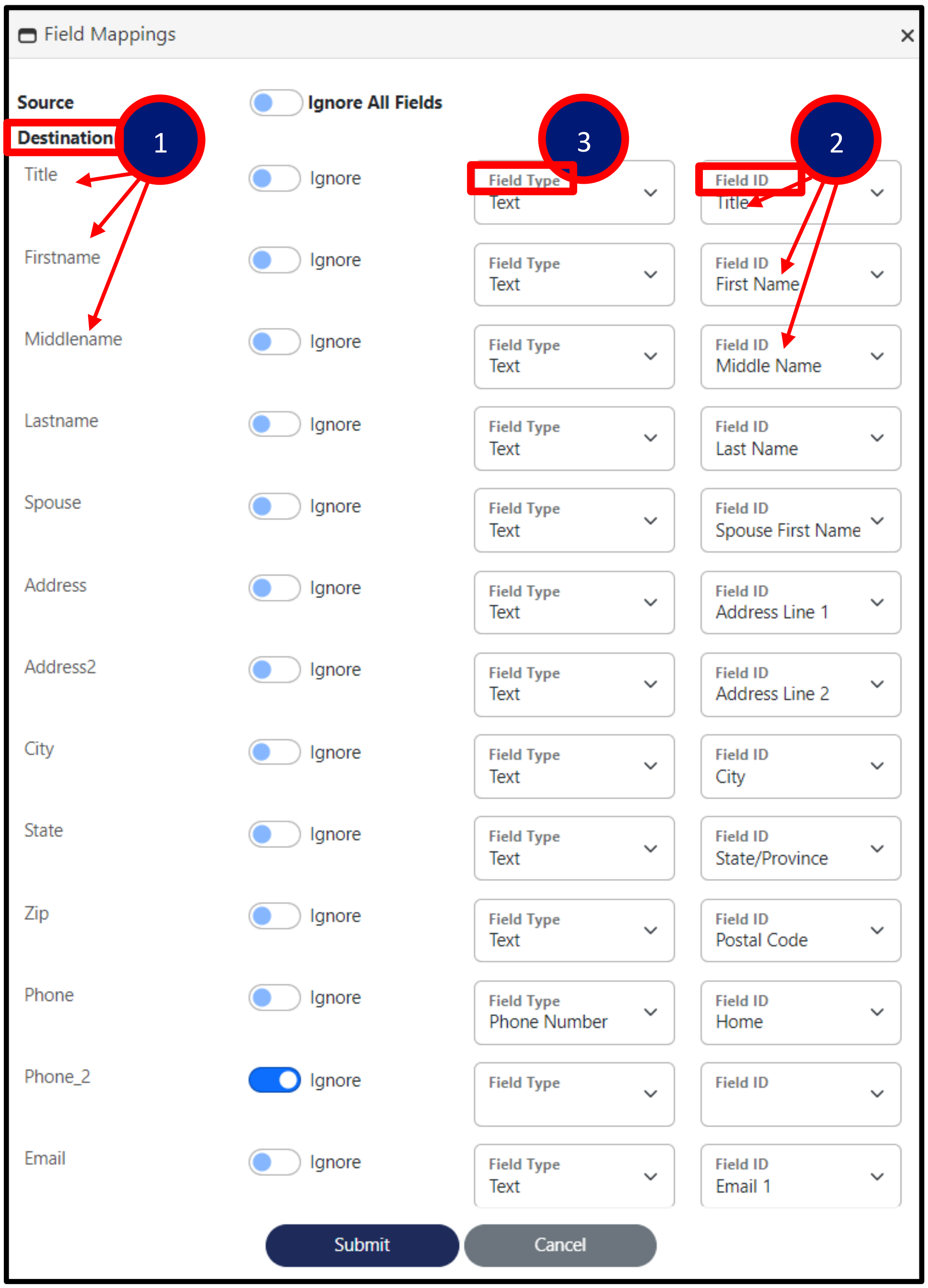
1 **Destination**: Excel or CSV Import File Fields

to the

2 **Field ID**: Aegis CRM Field Names

via the

3 **Field Type**: Type of field utilized - Text, Flag, Note, etc.



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

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

Your job has been scheduled and you'll receive an email notification once it completes.

OK

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

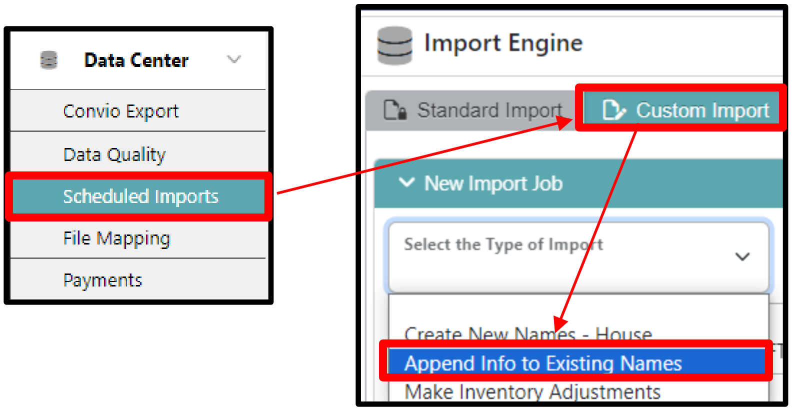
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Run Now	Deactivate
No records to display.								

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	Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	Error Report

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

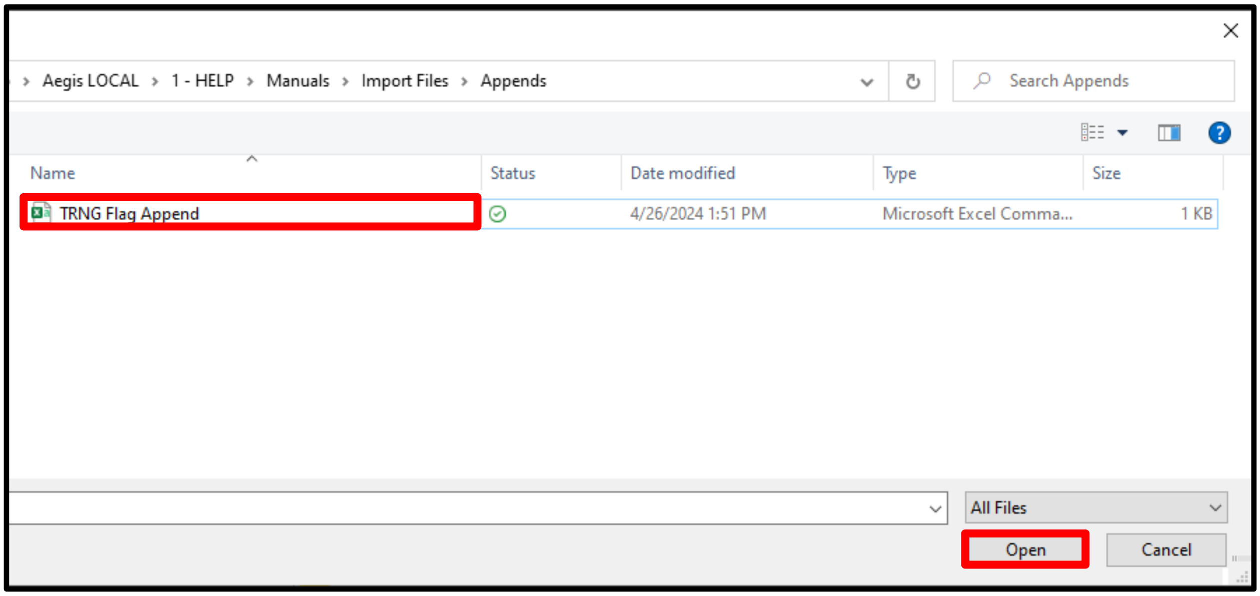
Appending Existing Names STEPS

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:

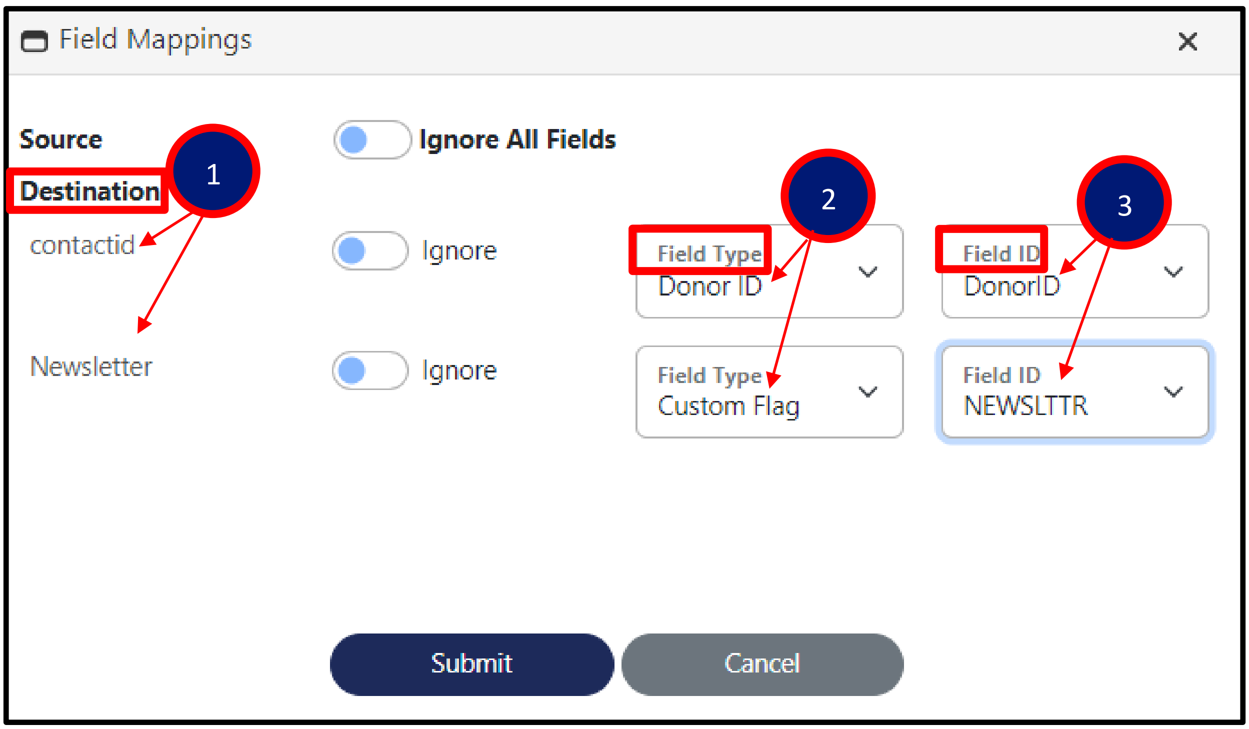
1 **Destination**: Excel or CSV Import File Fields

to the

2 **Field ID**: Aegis CRM Field Names

via the

3 **Field Type**: Type of field utilized - Text, Custom Flag, Donor ID, etc.



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

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

> Your job has been scheduled and you'll receive an email notification once it completes.
>
> OK

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

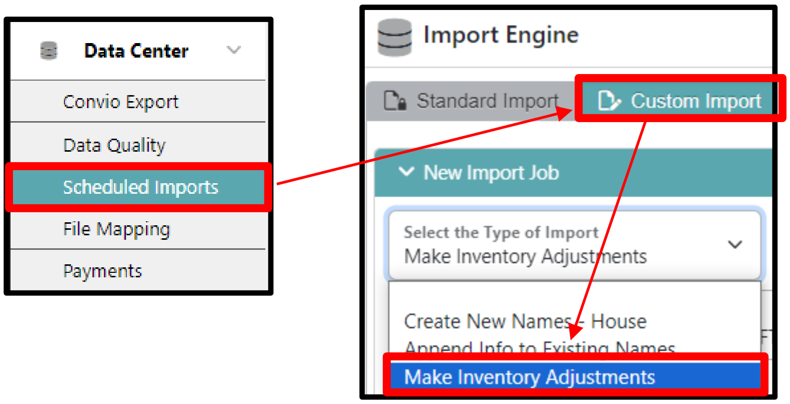
Job Type	Description	Created By	Schedule	Last Run Time	Next Run Time	Date Created ▼	Run Now	Deactivate
No records to display.								

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	Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	Error Report

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.

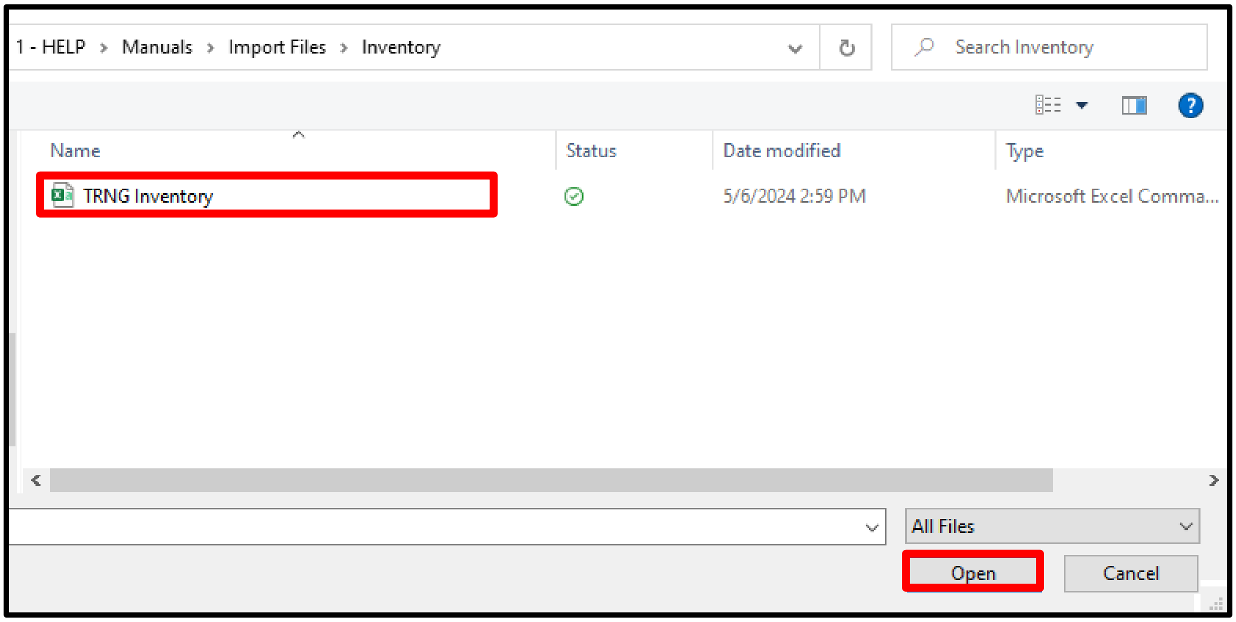
2. Click on the **Custom Import Tab**.

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:

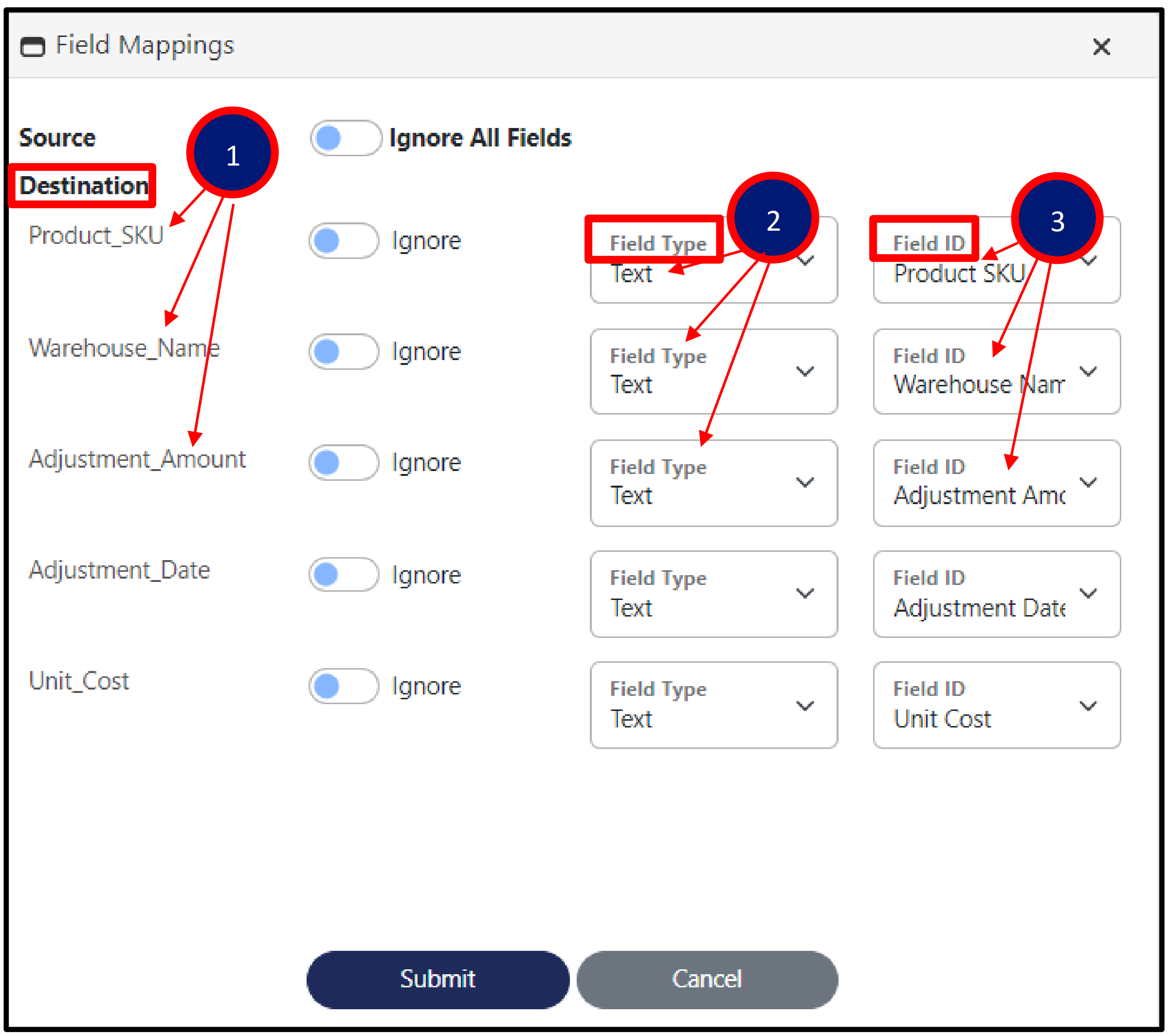
1 **Destination**: Excel or CSV Import File Fields

to the

2 **Field ID**: Aegis CRM Field Names

via the

3 **Field Type**: Type of field utilized - Text, Custom Flag, Donor ID, etc.



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

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

> Your job has been scheduled and you'll receive an email notification once it completes.
>
> OK

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.

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.								

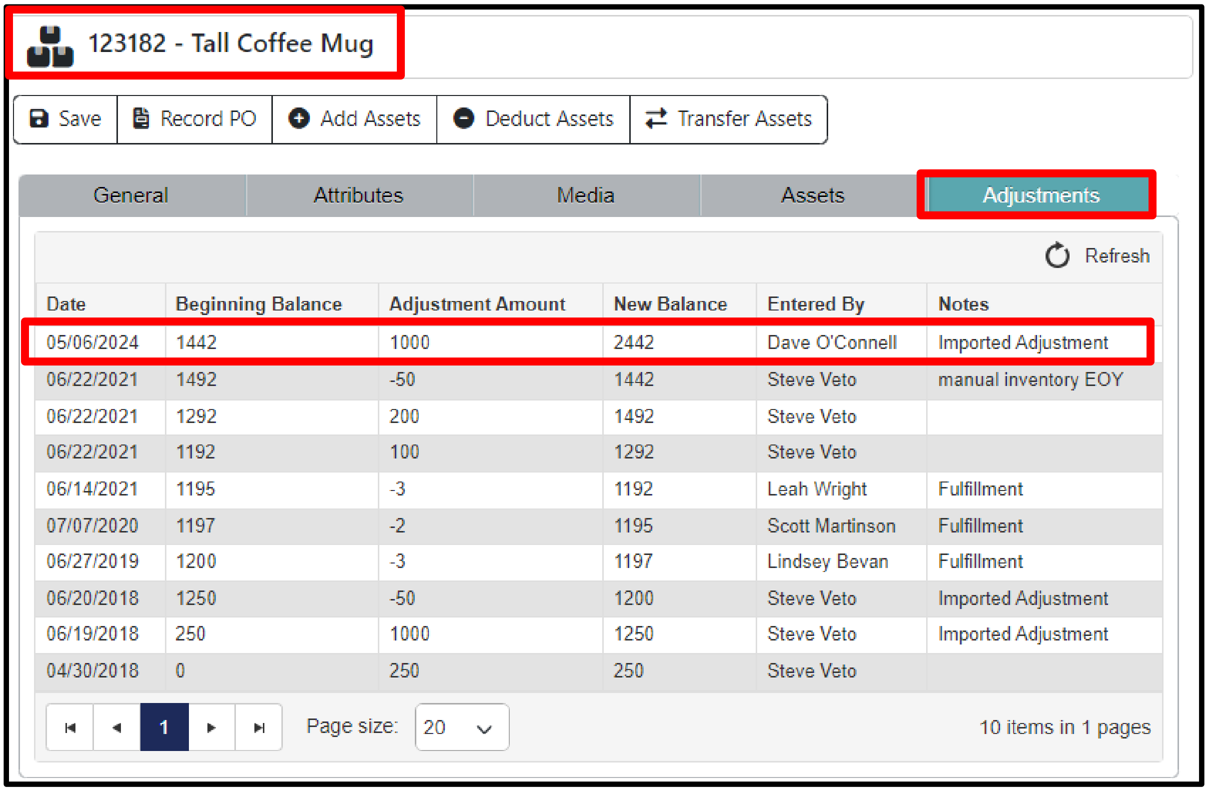
Custom Import History

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	Error Report
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	Error Report
Data Append	Data Append Job	Completed	Laurice Wall	04/26/2024 9:57:34 AM	50	50	50	0	Error Report

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: Successfuly adjusted SKU [123182] with amount [1000]. **	123182	Main	1000	5/6/2024	5
** INFORMATION: Successfuly 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.



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	