

# Import-O-Matic

The flexible import solution for The Raiser's Edge

Developed by O-matic Software, a Blackbaud Partner



## You can use Import-O-Matic to:

- Process constituent, address, gift, relationship, volunteer, tribute, membership, prospect, action, attribute and event records **simultaneously**
- **Import data** from banks, lockboxes, mail houses, prospect lists, web sites, ticketing systems, payroll or HR and patient or alumni databases, and much more efficiently and accurately
- On-the-fly **duplicate checking** allows user to select from a list of possible matches or auto pick an exact match
- Create **unlimited custom templates** to import from nearly any file layout
- Import **event participants, membership & honor/memorial tribute** gifts
- Optionally import gifts directly into **gift batches**
- **Set default values** for nearly any constituent, gift, or participant field
- **Merge/change** duplicate records on the fly
- Add or update addresses, as appropriate, **with the click of a button**
- Match constituents on **alias or email addresses** as well as biographical and address data
- Automatically **proper case** biographical information
- Automatic **data clean up and standardization**
- Create **static result queries** for all records modified or added
- Automatically create or import constituent **action records**
- Import time sheets and job assignments for **volunteer records**
- **Add or update** individual, organization, financial, and educational relationships
- Optional add-on to **schedule imports** to run automatically and email when completed
- A **robust, open API** that allows your organization to customize how data is processed and make if... then...else decisions on imported data

## IMPORT-O-MATIC

“When your organisation is dependent on integrating several data sources into The Raiser's Edge, building and maintaining those data streams can be very time consuming. Import-O-Matic has allowed us to efficiently add all our other data sources into The Raiser's Edge. The set-up is easy and the maintenance has saved us many hours of manual import creation.”

– Peter Doonican,  
Head of Research and Information,  
University of the Arts London

## Get started today!

To learn more about Import-O-Matic or other Blackbaud products and services visit <http://raisersedge.blackbaud.co.uk> or contact your Blackbaud account representative. ►



Supported by O-matic Software

**In comparison to the standard Raiser's Edge import, Import-O-Matic offers:**

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

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