

## ImportOmatic™

The flexible import solution for Raiser's Edge™ — developed by Omatic Software.

ImportOmatic is an advanced importing plug-in that allows users to seamlessly import data from any other system directly into Raiser's Edge, eliminating the need to manually key data, get to grips with the standard import, or spend unnecessary resources cleaning up your data.

ImportOmatic will help you to:

- Reduce your data entry time and expense
- Improve the accuracy and integrity of your data by eliminating manual data entry
- Increase data reliability and decrease mail costs with 'on-the-fly' duplicate checking



# Benefits of ImportOmatic over standard import functionality

1

## **The ability to import from any source**

ImportOmatic allows you to import from just about any source, by creating Profiles that map the fields in your data file (eg. Excel/CSV) to the correct field in Raiser's Edge.

2

## **The ability to import multiple record types simultaneously**

Multiple record types, including constituent, gift, relationship, event, tribute and prospect can be imported simultaneously – rather than one-by-one as with standard import functionality.

3

## **'On-the-fly' duplicate checking**

Multiple duplicate criteria sets can be used simultaneously to resolve possible duplicates 'on-the-fly'. As the data is being imported, you receive pop-ups notifying you of potential duplicates and can choose whether you wish to merge the duplicates, create a new constituent or skip.

4

## **Numerous standardisation options**

- ImportOmatic has a 'Data Dictionary', which you set up to standardise the data coming in. Eg. You might tell it to always import 'st' as 'Street'.
- ImportOmatic will automatically change data to use proper casing. Eg. 'ROBERT MCDONALD' will be changed to 'Robert McDonald'.
- ImportOmatic has the ability to remove leading zero or fix zeros that were dropped from constituency IDs in Excel.

# What else can you do with ImportOmatic?

- 1 Apply default fields and attributes to records, such as 'online gift', constituency codes and addressee/salutations, to records processed without that field contained in the import file.
- 2 Import data from banks, lockboxes, mail houses, prospect lists, websites, ticketing systems, and HR, patient and alumni databases efficiently and accurately.
- 3 Update existing records as well as create new records.
- 4 Create unlimited custom templates to import from nearly any file layout.
- 5 Import event participants, membership and honor/memorial tribute gifts. And optionally import gifts directly into gift batches.
- 6 Set default values for nearly any constituent, gift or participant field.
- 7 Add or update addresses and relationships with the click of a button.
- 8 Match constituents on alias, email addresses, biographical and address data.
- 9 Run automatic data clean up.
- 10 Create static result queries for all records modified or added.
- 11 Automatically create or import constituent action records.
- 12 Import time sheets and job assignments for volunteer records.
- 13 Schedule imports to run automatically and email when completed (optional add-on)
- 14 Customise how data is processed and make if... then...else decisions on imported data, thanks to a robust, open API.

# Customer Story

Samaritan's Purse uses ImportOmatic™ to slash workload and increase efficiencies.

Samaritan's Purse is an international Christian relief and development organisation that works through local churches to provide aid to people around the world. One of the charity's main campaigns is 'Operation Christmas Child'. The database for this campaign had always been kept completely separate from the charity's main fundraising database, Raiser's Edge, yet the possibility of the same people featuring on both databases was very high.

## Why did you decide to use ImportOmatic?

"We were always well aware of the potential for missed opportunities because we didn't have a truly complete picture of our donors and supporters. However, the task of merging and de-duping the information from our Christmas campaign database into Raiser's Edge was just too massive, and we really didn't think it would be possible.

I had heard some really good things about ImportOmatic. The feedback was all excellent. When I investigated it further, I could not only see how this would help with our immediate requirements, but also with other areas of our day to day processing."

## What impact has ImportOmatic had on your organisation?

"It was a very straightforward process to import the Christmas campaign data into Raiser's Edge and our expectations on the amount of time it would take were far exceeded. We are now also using ImportOmatic in the processing of our online payments and direct debits, which means we no longer have to manually set up new donors. This previously would have taken one person a full day to execute but can now be carried out in just an hour, regardless of the number of entries."

## Have you been impressed with ImportOmatic so far?

"ImportOmatic has made such a difference to our organisation and I'm so impressed with it. Every process that we now come across, we look to see if ImportOmatic can help to reduce the workload. Because of ImportOmatic we can build a much clearer picture of our donors, which is truly invaluable in helping us achieve our mission."

