NPSP Administrator's Guide to Importing Donor Data

@salesforcedocs

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Contents

Introduction

This guide is intended to help nonprofit administrators use the NPSP Data Import object to transfer their organization's existing donor data to Salesforce. The guide is designed for use with the Nonprofit Success Pack (NPSP) or any version of Nonprofit Starter Pack 3.0 or later.

Audience and Prerequisites

You should have *some* familiarity with Salesforce and the Nonprofit Success Pack before attempting to step through this guide. If you haven't done so already, we recommend that you complete the Manage Fundraising for Nonprofits trail before proceeding.

You should also be familiar with the Salesforce Account model before attempting to import any data. In particular, you should be familiar with the Household Account model, which is the default account model for NPSP version 3.0 and later. For more information, see the account model documentation on the Power of Us Hub.

Data Import Overview

Your organization is ready to manage its donors in Salesforce, but first you have to import your existing donor data. The Nonprofit Success Pack provides tools to streamline the process and automate the translation of your data into Salesforce objects.

If you're used to working in Excel, think of Salesforce as many, many spreadsheets, all related to each other in specific ways, and all stored on the Internet. Salesforce is like a gigantic database in the cloud, and we commonly refer to the various "parts" of Salesforce as *objects* (Contacts, Household Accounts, donation Opportunities, and so on). You can see these as the tabs across the top of your Salesforce organization.

We cannot tell a lie: if you have thousands of data rows in existing spreadsheets or in-house databases, importing your data into the right Salesforce objects takes a lot of work. The good news? With the Nonprofit Success Pack tools described in this guide, you don't have to tackle this complex, time-consuming project without some help.

> **Important**
> Even with the help of these tools, you need to budget enough time to go through the data import process properly. Data import is not something that can normally be done in an hour or two–it could take up to a month or more to go through all

of the required steps, depending on the quality and quantity of your data. Please prepare accordingly.

How the Import Process Works

To get donor data into Salesforce, follow these steps.

Clean up your existing data.
Do this in your existing spreadsheet, database, paper ledger, or wherever you currently maintain your donor data. See Clean Up Your Data.

Transfer your existing data into a template that's specially designed to structure your donor data for import.
Use the spreadsheet file called `NPSP Data Import Template.csv`, which mirrors the fields in the NPSP Data Import custom object. See Transfer Your Data to the Template.

Upload data from the template into the NPSP Data Import custom object.
Use the Salesforce Data Import Wizard (in Salesforce Setup), or an external data import application (such as SalesforceData Loader, DemandTools, Apsona, Jitterbit, and Informatica) to upload your data to Salesforce. (This is the first part of the two-part import process.) See Upload Data from the Template.

Verify the uploaded data in Salesforce.
Check the fields in the NPSP Data Import custom object to make sure that your data uploaded correctly. See Verify Data Upload.

Do a Dry Run.
If you already have records in your org and want to check to see if the records you're about to upload match any of those existing records, you can do a dry run. The dry run works like the import process, but doesn't actually import the records. This will help prevent duplicates in your org and help you avoid updating an existing record with incorrect data.

Run the NPSP Data Importer tool to complete the import.
Start the NPSP Data Importer tool, which takes the organized data from the custom object and imports it into the Nonprofit Success Pack as multiple objects, including Contacts, Accounts, and donation Opportunities. See Import Your Data.

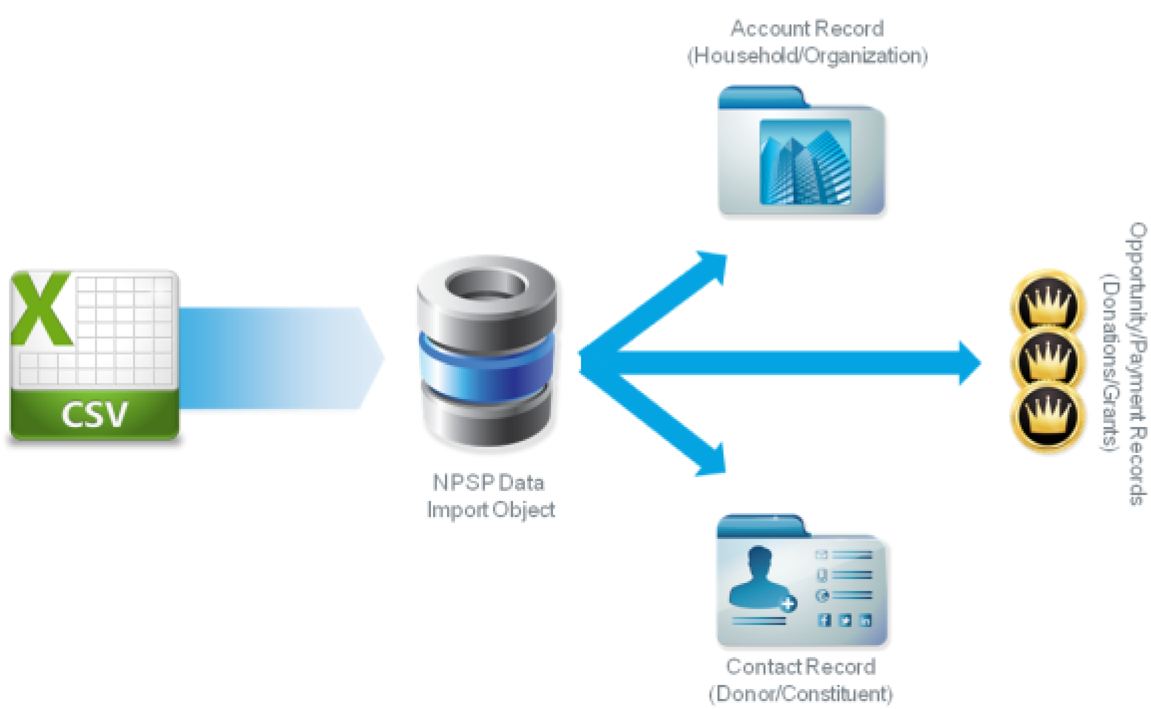
By the time you're done, your data will reside in the following multiple Salesforce objects created from the import process.

- Contacts (which normally translate to donors in the NPSP)
- Accounts (Households or Organizations in the NPSP)

- Opportunities (Donations, Payments, Grants, and the like in the NPSP)
- Campaigns

Important
The Nonprofit Success Pack automatically creates a new Household Account object for each initial Contact you're importing. Again, previous familiarity with the Nonprofit Success Pack and the Household Account model will help you here. For more information see What is an Account Model? on the Power of Us Hub.

This illustration shows you what the data import process ultimately looks like:



Why Is It All So Complicated?

You may be thinking that this process seems awfully complicated. You may also be wondering why we need an intermediate step of uploading data to the NPSP Data Import custom object. What's its purpose?

Without this custom object, you would need to transfer your existing data into multiple spreadsheets–each one representing a table of Contacts, Accounts, donations, and so on. Then you'd need to import each spreadsheet into Salesforce, individually and in the correct sequence. First create Accounts, then Contacts, and so on. After each import, you'd need to export the data from Salesforce, get unique IDs for records, and create relationships between these records and the records in your other spreadsheets. The NPSP Data Importer not only creates exactly the objects you need from the single custom object, but it also avoids creating duplicates of existing Contacts and Accounts.

We won't go into more detail here. But believe us when we say that the NPSP Data Import object can save you hours of work!

Try a Limited Test Run

Verify that your import process succeeds with a small number of records before trying to import all records.

In this guide, we'll work with a small batch of donor records. Even if you have thousands of records to import, we recommend that you go through the entire process once, with a small subset of records. Clean up your data, get it into the required structure, and verify it imports successfully before you import your entire donor database.

Preliminary Tasks

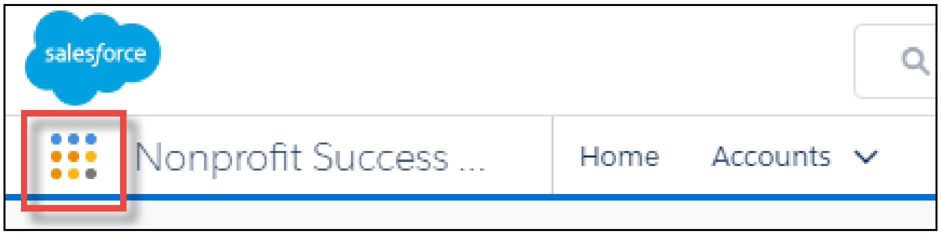
Before you can import data, preview the template structure and the custom object that will contain the uploaded data. Previewing the structure will help you understand why your existing data must be as clean as possible.

Cleaning your data is a time-consuming step, but also the most important. Time spent here pays dividends later.

Download the Template

Download the spreadsheet file called `NPSP Data Import Template.csv`, which mirrors the fields in the NPSP Data Import custom object. Use the template to help structure your data.

1. In the upper left corner, click the App Launcher.



2. Scroll to the All Items section and click **Files**.
3. Download the file named `NPSP Data Import Template`. If you don't see the file, you can find it on the Power of Us Hub.

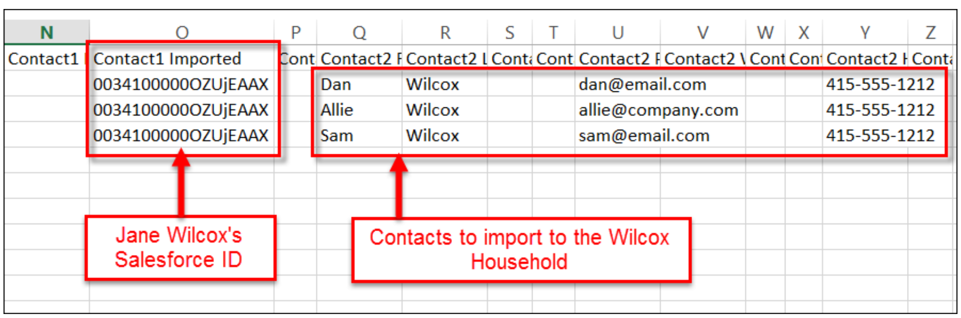
Preview the Template Structure

Open the `NPSP Data Import Template.csv` file in your favorite spreadsheet application so you can see how the data needs to be structured.

Each row contains data fields for up to two Contacts, up to two related Organizational Accounts (different from Household Accounts, more on that in a bit), a home address, and a donation (Opportunity). The template also includes the most common fields on the Contact, Account, Address, Opportunity, and Payment objects. For a full list of fields in the template, see Appendix B: NPSP Data Import Fields.

As part of the import process, Salesforce automatically creates a Household Account for each Contact1 in the template. Later, when you go to add data to the template, you can adjust the template to accommodate more Household members if you have more than two people in the same Household. For each new Contact in the Household, simply add a new row containing Contact1 and include the new Contact in the Contact2 column. Salesforce will add that new Contact (in the Contact2 column) to Contact1's Household Account. You can repeat this process for any additional Contacts in the Household. For example, let's say you want to import Jane Wilcox (Contact1), her husband, and her two kids. Your input file would look like this:

You can also add new Contacts to Households using the Imported fields. For example, if you had Jane Wilcox's Salesforce ID, you could add it in the Contact1 Imported column in the spreadsheet, then add her husband and children in the Contact2 column (each on a new line of the spreadsheet). Or if you had the Household ID, you could include it in the Household Account Imported field on the template, then add her husband or children in the Contact2 column.



Important

The Account fields in the template are used to create optional **Organizational Accounts** with which the related Contacts are affiliated (that is, Contact1 is affiliated with Account1, Contact2 is affiliated with Account2). **Don't enter Household information in the template's Account fields, because the Account fields are for Organizational Account information only**.

If you want to import additional fields–whether standard fields, Nonprofit Success Pack fields, your own custom fields, or fields from a managed package–you certainly can. Add those additional fields to both the template and the NPSP Data Import object. For details, see Appendix C: Import Additional Fields.

Preview the NPSP Custom Object

For a different view of the same fields in the data import template, we recommend you spend a few minutes previewing the NPSP Data Import custom object itself. Salesforce creates the appropriate records from the data in your template, and houses the data in the custom object until it's ready for actual import.

1. In the upper left corner, click the App Launcher ( ).
2. Scroll down to the All Items section, and click NPSP Data Imports.
3. Click **New** to see the fields on the NPSP Data Import Edit page.

Now that you understand how Salesforce expects your data to be structured, let's switch gears to your existing data.

Clean Up Your Data

Getting your data in great shape for import is the most important step. It's also the most labor-intensive.

Maintaining data quality is hard. Your data may have been entered in different ways by different people, and may be incomplete or out-of-date. Additionally, you may not have been able to enforce data validation rules or consistent formatting with your previous tools. That's OK. It's expected, even.

As you make the transition to donor management in Salesforce, **your data must absolutely be highly structured and in the required format**. Otherwise, Salesforce will reject it. Your data can't have inaccuracies, inconsistencies, and duplicates. Invest the time **now** to clean up your data and your organization will reap the benefits for years to come. If you simply try to get your data into Salesforce as quickly as possible, without regard to its accuracy or cleanliness, then you will have a much harder time convincing your staff to use Salesforce because they won't trust the information they see.

Salesforce offers a video series about data import. Check out the videos to get more information on preparing your data for import.

If you're using Excel, this handy guide can help you clean up your data.

Sample Data Quality Problems

Let's look together at common data quality problems and how to fix them.

We'll review a sample set of 20 records in our donor tracking spreadsheet. Data validation verifies that the value in every cell is the data that's supposed to be there.

Before reading ahead, see if you can spot some common data quality problems in this screenshot. Want a hint? Rows 7, 10, and 11.

	A	B	C	D	E	F	G	H
1	First Name 1	Last Name 1	First Name 2	Last Name 2	Organization	Address1	City	Zip
2	Alfred	Tennyson	Emily	Tennyson		123 Main St.	Somersby	43211
3	Oscar	Wilde				234 Main St.	Dublin	
4	Jane	Austen				345 Main St.	Bath	54322
5	Samuel	Taylor Coleridge			Poetic Resources, Inc	456 Main St.	Highgate	10022
6	Elizabeth	Barrett Browning	Robert	Browning		567 Main St.	London	10021
7	Thomas	Hardy				678 Main St.	Dorchester	7782
8	Robert Louis	Stevenson			Treasure Island Foundation	789 Main St.	Edinburgh	
9	Elizabeth	Gaskell	William	Gaskell		900 Main St.	Alton	54321
10	Charlotte, Emily, A	The Brontë Family			Parsonage Foundation	1011 Main St.	Howarth	65432
11	Lewis	Carroll	Guest of Lewis Carroll			1122 Main St.	Guildford	
12	Percy Bysshe	Shelley	Harriet	Westbrook		1233 Main St.	Lerici	
13					Authors Association	1344 Main St.	London	10021
14	Mary	Shelley	Fanny	Imlay		1455 Main St.	Dundee	
15	William	Wordsworth				1566 Main St.	Windermere	65400
16	Charles	Dickens	Catharine	Dickens		1677 Main St.	London	10021
17	George	Eliot				1788 Main St.	Warwick	40085
18	William	Blake			Burning Bright Bank	1899 Main St.	London	10021
19	Christina	Rossetti				2010 Main St.	London	10021
20	H. G.	Wells				2121 Main St.	London	10021

As we scan this part of the spreadsheet, we see some problems in the highlighted cells.

	A	B	C	D	E	F	G	H
1	First Name 1	Last Name 1	First Name 2	Last Name 2	Organization	Address 1	City	Zip
2	Alfred	Tennyson	Emily	Tennyson		123 Main St.	Somersby	43211
3	Oscar	Wilde				234 Main St.	Dublin	
4	Jane	Austen				345 Main St.	Bath	54322
5	Samuel	Taylor Coleridge			Poetic Resources, Inc	456 Main St.	Highgate	10022
6	Elizabeth	Barrett Browning	Robert	Browning		567 Main St.	London	10021
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19	Christina	Rossetti				2010 Main St.	London	10021
20	H. G.	Wells				2121 Main St.	London	10021

- Row 7: The ZIP Code is missing a digit.
- Row 10: Every row should represent a single person or organization. Five members of the Brontë family are grouped into the same row. Also, the last name should be simply, "Brontë."
- Row 11: "Guest of Lewis Carroll" isn't actually a first name.

Let's scroll over to the right half of the spreadsheet. See if you can spot other values that are problematic. Want a hint? Rows 3, 4, 11, 14, and 20.

	I	J	K	L	M	N	O	P
1	DOB 1	DOB 2	Email address	Amt.	Donation Type	To Expire	Check #	Check Date
2				$50	inactive	12/1/12	20533	11/22/11
3			foo@bar.com0003	$200	Contributor	12/15/12	5125 & 5126	11/25/11
4				$35	Active	12/15/12	Cash	no receipt
5				$500	MATCHING GIFT	12/15/12	670888	12/5/11
6	5/7/13	3/31/13		$50	Friends & Family	1/1/12	Cash	
7				$35	Active	1/1/12	9082	12/26/11
8			foo@bar.com0008	$2,500	Grant	1/1/12	6783	12/10/11
9				$100	Contributor	1/1/12	VISA	12/30/11
10				$1,000	Patron	1/1/12	1021	12/24/11
11			foo@bar	$50	Friends & Family Membership			7/22/11
12				$50	Friends & Family Membership			7/24/11
13				$200			8809	8/12/11
14				$100	In Memorial of Victor Frankenstein		75757	10/22/12
15				300	Supporter Membership	5/1/13	purchased in the g	2/27/12
16				50	Friends & Family Membership	5/1/13	purchased in the g	2/21/12
17			foo@bar.com0017	$2,000	Auction Supporter			
18				500	Outreach		69711	13-Mar
19				$3,500	Day of Giving		Paid online throug	5/6/12
20	65 y.o.			$250	Day of Giving		Paid online throug	5/6/12

More data quality problems are highlighted here.

	I	J	K	L	M	N	O	P
1	DOB 1	DOB 2	Email address	Amt.	Donation Type	To Expire	Check #	Check Date
2				$50	inactive	12/1/12	20533	11/22/11
3			foo@bar.com0003	$200	Contributor	12/15/12	5125 & 5126	11/25/11
4				$35	Active	12/15/12	Cash	no receipt
5				$500	MATCHING GIFT	12/15/12	670888	12/5/11
6	5/7/13	3/31/13		$50	Friends & Family	1/1/12	Cash	
7				$35	Active	1/1/12	9082	12/26/11
8			foo@bar.com0008	$2,500	Grant	1/1/12	6783	12/10/11
9				$100	Contributor	1/1/12	VISA	12/30/11
10				$1,000	Patron	1/1/12	1021	12/24/11
11			foo@bar	$50	Friends & Family Membership			7/22/11
12				$50	Friends & Family Membership			7/24/11
13				$200			8809	8/12/11
14				$100	In Memorial of Victor Frankenstein		75757	10/22/12
15				300	Supporter Membership	5/1/13	purchased in the g	2/27/12
16				50	Friends & Family Membership	5/1/13	purchased in the g	2/21/12
17			foo@bar.com0017	$2,000	Auction Supporter			
18				500	Outreach		69711	13-Mar
19				$3,500	Day of Giving		Paid online throug	5/6/12
20	65 y.o.			$250	Day of Giving		Paid online throug	5/6/12

- Row 3: Each donation should have a single check reference number. Also note that other rows have text, and not check numbers!
- Row 4: Date fields should be date values, which "no receipt" isn't.
- Row 11: The email address is incomplete.
- Row 14: This entry isn't a standard donation type.
- Row 20: Another date field (in the DOB 1 column) containing a non-date value.

Fix Data Quality Problems in Your Existing Data

It's common to find a lot of data quality problems in your existing data. In our sample data set, we found 8 just within the first 20 rows. While the number may be high, the problems should be straightforward to fix. Check for these common data problems in your donor data.

- Does every field represent a single piece of information? For example, are first name and last name in separate fields (columns)?
- If you have multiple donations from the same person, is each donation on its own row with the associated donor's information?
- Is Contact information current and correctly formatted? Don't waste money mailing to invalid addresses.

   - Addresses: Distinguish mailing addresses from physical addresses. Make sure to preserve the formatting of multi-line addresses. Third-party tools can be useful for address validation.
   - ZIP codes: In spreadsheets and databases, make sure ZIP codes are formatted as text fields or else leading zeroes may be removed. (See your spreadsheet application's Help for more info.)
   - Email addresses: Make sure there is an @ symbol and a .com or other valid ending for every email address.
   - Phone numbers: Depending on the country, you may want to check that phone numbers conform to the convention for that country. Wikipedia has a great reference here. And don't forget the international dialing code. See the Wikipedia list of country calling codes.

     If you plan to use the Phone Number as a matching field against existing Contacts, it's critical that it matches the correct format for your existing data. For example, if all of the phone numbers in your database are formatted as 123-345-4567, then don't import phone numbers as 123.345.4567.

- Does the data within each field actually represent what's supposed to be there? For example, does a single cell in the phone number field contain multiple bits of information for a Contact? Here's a common error: "1-212-645-5555 x4352, assistant Peter and Jane, cell 917-555-1234" is all in one field. This information should really be split into three separate fields: Contact1 Work Phone 1-212-645-555 x4352, Contact1 Mobile Phone 917-555-1234, and Notes: Assistant Peter and Jane.
- When matching records, data import is case sensitive. Are the entries in the Contact Name, Account Name, and Campaign fields in the correct case? For example, if you have a Contact named Janet Brown in your Salesforce org and your template includes the Contact janet brown, the NPSP Data Importer won't match these records.

> **Tip**
> Move any inappropriate values or information to the Notes column. The Notes column is a great place to capture information that you're not sure what to do with yet.

You know you're done with the data cleanup phase when every field represents a single piece of information, and every value in that field represents the data that's supposed to be in that field. The goal is to have one thing (the right thing!) per field or cell.

"But wait!" you say. "I have a spreadsheet with 20,000 rows of data! Do I really need to clean up every single row, and make all of my data consistent, by hand?" The answer to this question is, unfortunately, yes. Manual data cleanup is tedious, but it will have enormous payoffs for you later, ideally starting with an error-free process when you import the data into Salesforce.

Moving Your Data to the Template

Once your existing data is clean, choose a tool to upload your data and then transfer your data to the template.

Prepare the Template Column Headers

Now that your data is clean, let's return to the `NPSP Data Import Template.csv` file. Decide which tool you'll use to upload your data. Your choice of tool determines which column headers to use in the template.

Salesforce relies on the template's column headers for proper data transfer.

Upload Tool of Choice	Required Column Headers	Delete in the Template
Salesforce Data Import Wizard (in Salesforce Setup)	Field Labels; the human-readable column headers, like Contact1 First Name.	Rows 1 through 4 and 6. (Leave Row 5.)
Another external tool, such as SalesforceData Loader, DemandTools, Apsona, Jitterbit, Informatica, and so on.	Field Names; the names designed for use with APIs, like NPSP_CONTACT1_FIRSTNAME__C. Most external tools allow you to map fields to any column in your spreadsheet, but using these names will make your life easier in the long run.	Rows 1 through 5

Note
If you don't see the above-mentioned rows in your template, you may have an older version of the template. You can download the most recent version of the template from the Power of Us Hub.

For simplicity, we recommend you use the Salesforce Data Import Wizard unless your data set has more than 50,000 records and you can't easily break it up into smaller chunks. In this guide, we show you how to use the template with the Data Import Wizard.

Delete the instruction rows and the row containing the labels you're not using. The first row should contain the required column headers, and the subsequent rows should contain the clean data you're importing. There shouldn't be any rows at the end of your spreadsheet containing notes or other information that you don't want to import into Salesforce.

Transfer Your Data to the Template

After you've cleaned up your existing data, you're ready to fill out the template spreadsheet.

Note
Make sure you've reviewed Preview the Template Structure before you begin transferring data to your template.

Keep in mind these guidelines when completing the template.

- Copy and paste the data from your existing data source, without altering your existing data source. Keeping your original data source intact is a best practice that will allow you to go back and examine it should you experience problems or conflicts later on.
- To represent multiple donations from an individual, household, or organization:
  - Enter each donation in its own row for the Contact or Account.
  - Fill out the Contact's Firstname, Lastname, Email, and/or Phone, or the Account's Name (if importing account donations) for each new row you've entered.
- Data import is case sensitive, so make sure all entries are in the correct case.
- Some fields are required, depending on the data you're importing. See Appendix B: NPSP Data Import Fields for more information.
- If you have custom fields that have no corresponding field in the default template, be sure to include them manually before you upload your data. For more information, see Appendix C: Import Additional Fields.
- If you're using the external Salesforce (Apex) Data Loader tool for your import, use the YYYY-MM-DD date format. This format is *not* the native Excel date format, and you'll need to reformat all of the columns that contain dates. See this Help and Training article for more information.

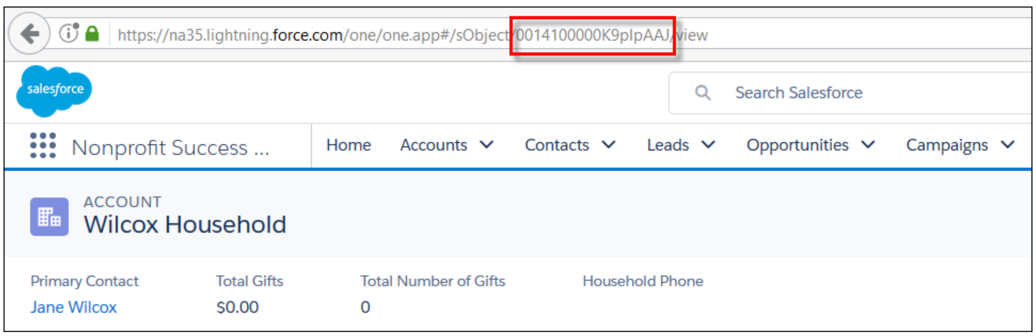
Remember to save your completed template as a CSV (comma-separated values) file.

A note about using Imported fields to match against Salesforce ID

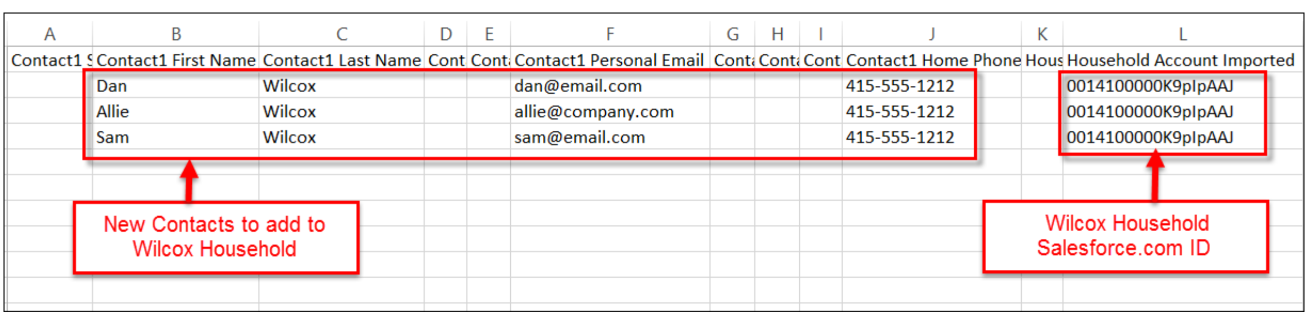
The NPSP Data Import template includes special Imported fields that are useful if you want to match Contacts, Accounts, Households, Opportunities, or Payments based on their existing 15 or 18 digit Salesforce ID. It's important to understand how these work when importing data.

Note
To match Opportunities or Payments, you must set a matching rule during the data import process. For more information, see Donation Matching Options. Keep in mind that donation matching should only be used to update an open Opportunity when a Payment comes in. A successful match will change the Stage of an open Opportunity to Closed/Won and/or mark an open Payment as Paid.

Let's say for example that you want to add members to an existing household in your Salesforce org. Or you want to update an existing Contact's Work Phone and Email because the Contact got a new job. You can easily achieve this as part of your Data Import. On the Contact, Account, or Household detail page, simply copy the Salesforce ID from the browser URL (as shown below).

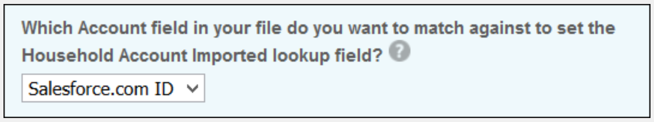


You'll then need to insert the ID in the appropriate field on the Data Import Template. To update an existing Contact, use either the Contact1 Imported or Contact2 Imported field. For Accounts, use the Account1 Imported or Account2 Imported field. For Households use the Household Account Imported field.



Note

When uploading the file, you'll need to indicate that you want to use the Salesforce.com ID to match against the Imported field. Taking this steps ensures that the columns get mapped properly.


Which Account field in your file do you want to match against to set the Household Account Imported lookup field?

Salesforce.com ID

Uploading Your Data

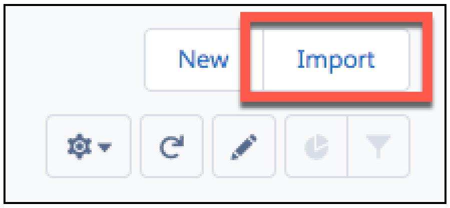
Upload data from your completed template into the NPSP Data Import custom object. From there, the NPSP Data Importer tool takes care of creating Contact, Account, and other objects containing your data.

Tip
Don't forget to verify that your import process succeeds with a small number of records before trying to import hundreds or thousands of records!

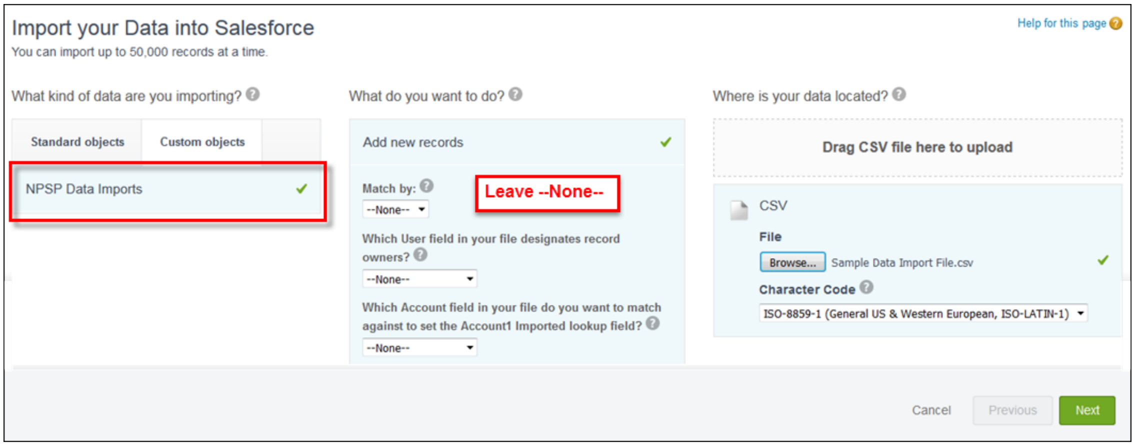
Upload Data from the Template

Now, let's use the Data Import Wizard to upload the template into the NPSP Data Import custom object.

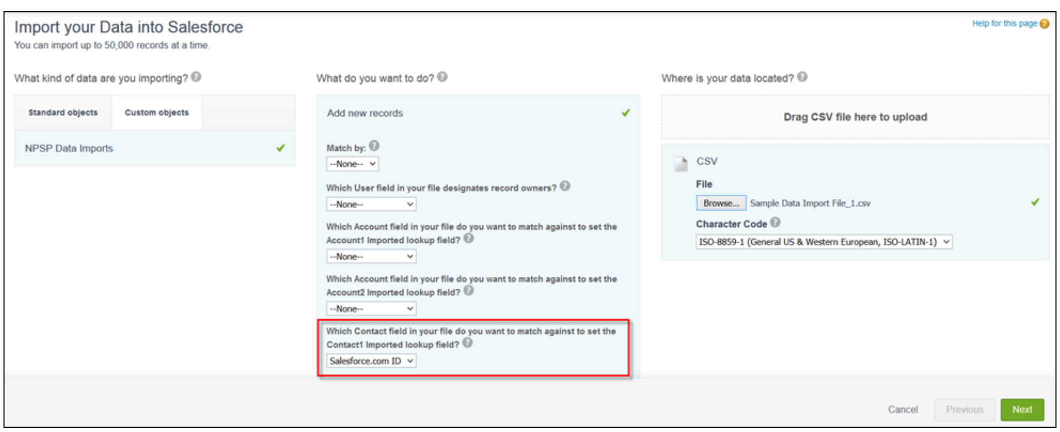
1. In the top left corner, click the App Launcher ( ).
2. In the All Items section, click **NPSP Data Imports**.
3. In the top right corner, click **Import**.



4. In the "What kind of data are you importing?" section, make sure the Custom objects tab is selected, and then click **NPSP Data Imports**.
5. In the "What do you want to do?" section, select **Add new records**.
   - If you're importing your data for the first time, or know that you will be matching to existing data based only on Name, Email or Phone, then leave all the options in this section set to `--None--` unless you are mapping one of the ID fields. Be sure to leave **Match by** as `--None--` regardless.



- If your spreadsheet has Salesforce IDs because you'd like for the NPSP Data Importer to match against existing Contact, Account, Donation or Payment records later in the process, select the appropriate value from the `What do you want to do?` section in the Import Wizard. Be sure to leave **Match by** set to `--None--`. Note that you'll need to have populated the corresponding Imported field (Contact1 Imported, Contact2 Imported, Account1 Imported, Account2 Imported, Household Account Imported) in the template file you're importing with the Salesforce 15 or 18 digit ID. For example, we populated the Contact1 Imported field (in the template) with Contact1's Salesforce ID. So, under **Which Contact field in your file do you want to match against to set the Contact1 Imported Lookup field?**, we select `Salesforce.com ID`.



6. In the `Where is your data located?` section, either drag-and-drop your completed template file to the drop zone or browse for the file to upload it.
7. Click **Next**.

8. Verify that the field mappings are correct and make any changes if necessary. Because you're using the template, the column headers should exactly match the field names or field labels in the NPSP Data Import object you're uploading to.

Edit Field Mapping: NPSP Data Imports

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Contact1 Salutation	Contact1 Salutation			
Change	Contact1 First Name	Contact1 First Name	Charles	Alfred	Oscar
Change	Contact1 Last Name	Contact1 Last Name	Dickens	Tennyson	Wilde
Change	Contact1 Birthdate	Contact1 Birthdate			
Change	Contact1 Title	Contact1 Title			
Change	Contact1 Personal Email	Contact1 Personal Email	foo@bar.com		
Change	Contact1 Work Email	Contact1 Work Email			
Change	Contact1 Alternate Email	Contact1 Alternate Email			
Change	Contact1 Preferred Email	Contact1 Preferred Email	Personal		
Change	Contact1 Home Phone	Contact1 Home Phone			
Change	Contact1 Work Phone	Contact1 Work Phone	44 20 7405 212		
Change	Contact1 Mobile Phone	Contact1 Mobile Phone			
Change	Contact1 Other Phone	Contact1 Other Phone			

Note

If you're matching by Salesforce ID and the Imported field shows as Unmapped, you likely selected the wrong field or value in the `What do you want to do?` section of the Data Import Wizard.

If for some reason a field or fields show up as unmapped, you can manually map template fields to NPSP Data Import object fields right here in the wizard.

9. Click **Next**.
10. Review the import summary.
11. Click **Start Import**. Your import starts and displays a confirmation message that lets you click through to the Bulk Data Load Jobs page, where you can monitor the status of the data upload.

Verify Data Upload

Make sure the data from your template uploaded successfully to the NPSP Data Import custom object.

1. In Salesforce, click the NPSP Data Imports tab. If you don't see NPSP Data Imports, click More ▼ at the end of the navigation bar. If the tab still isn't visible, see Appendix A: Make the NPSP Data Imports Tab Visible.
2. Choose the To Be Imported view to see records uploaded to the object. Keep in mind that while your data has been uploaded into Salesforce, it hasn't been added to (that is, "imported" into) any NPSP objects yet.

3. Spot-check some records to make sure all were uploaded correctly. If you mapped an ID with the data wizard and it's not appropriate for the type of record, it will be blank.

If for some reason your data did not upload correctly, or there were errors during the import process, you might want to delete all of the import records and start over again. (See Delete Imported Records.) Before re-doing your import, go back and review your CSV import file carefully. Simple things like leaving a "$" in the donation field, leaving a leading space like " Hello," or leaving out an "@" in an email address will cause import errors. *Make sure that every single row in your spreadsheet is cleaned and ready for import*.

Importing Your Data

After your records are successfully uploaded to the NPSP Data Import object, run the NPSP Data Importer tool to actually import the data into the appropriate Salesforce objects.

After import, you can delete the imported records from the NPSP Data Import object to save space.

Do a Dry Run

Once you import records into NPSP, you can't hit the undo button. And that can be problematic if you accidentally import records that you had previously imported, resulting in duplicate records in your org. It can also be problematic if the wrong record is matched and you've updated it with data from a different record. Doing a dry run allows you to see if there are any potential matches before you import.

A dry run goes through the Contact1, Account1, Contact2, Account2, Home Address, and Donations and identifies potential matches, but doesn't actually process the records into your org.

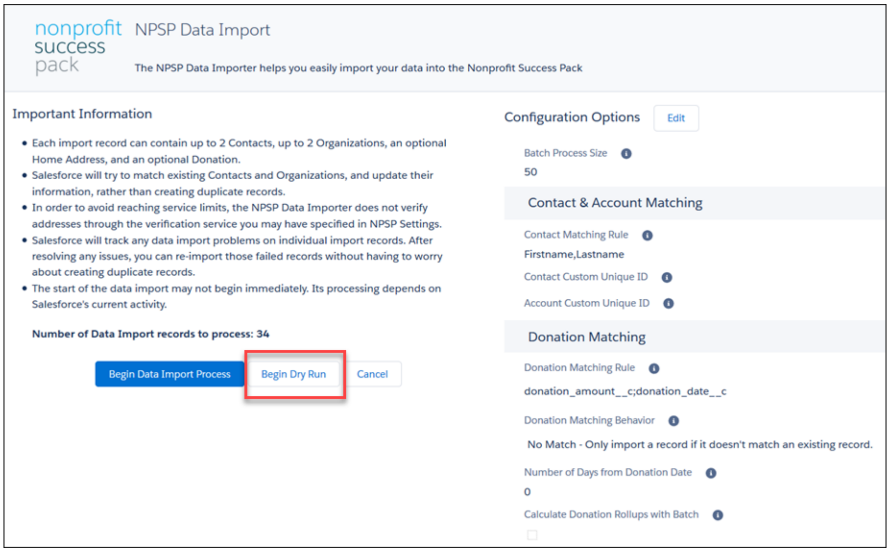
> **Note**
> A dry run only looks at Donations that are open Opportunities and unpaid Payments; it doesn't include Closed/Won Opportunities.

You can do a dry run on all uploaded records that haven't been successfully imported yet or on a specific batch.

> **Note**
> Dry runs look for and attempt to identify matches in existing records, so you should only do a dry run if you already have records in your org.

1. To do a dry run on all uploaded records that haven't been successfully imported yet:
    a. In the NPSP Data Imports tab, go to the To Be Imported list view.
    b. In the upper right corner of the page, click **Start Data Import**.
2. To do a dry run on a specific batch:
    a. From the App Launcher, click **NPSP Data Import Batches**.

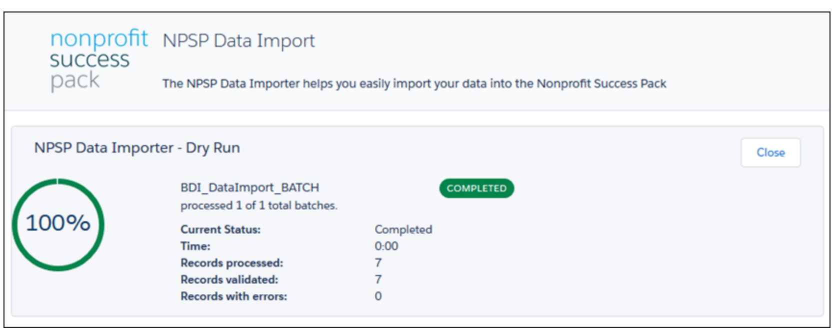
   b. Find the batch you want to put through a dry run and click the Batch Name.
   c. Click **Process Batch**.
3. On the summary page, click **Begin Dry Run**.



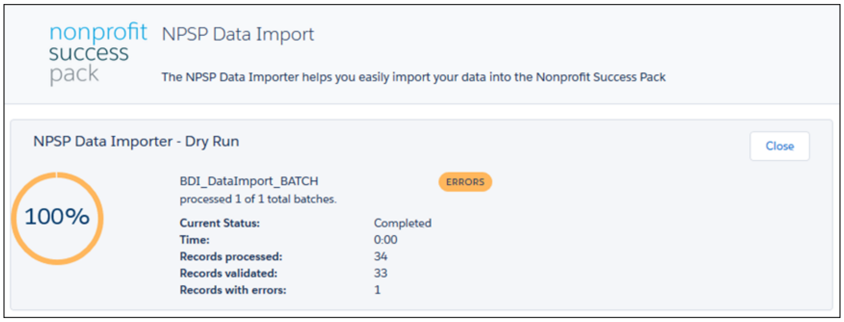
You can monitor progress on the status page as the dry run proceeds; it may take a few minutes for the import to start.

> **Important**
> Leave this tab open until the dry run finishes so you can see the detailed results.

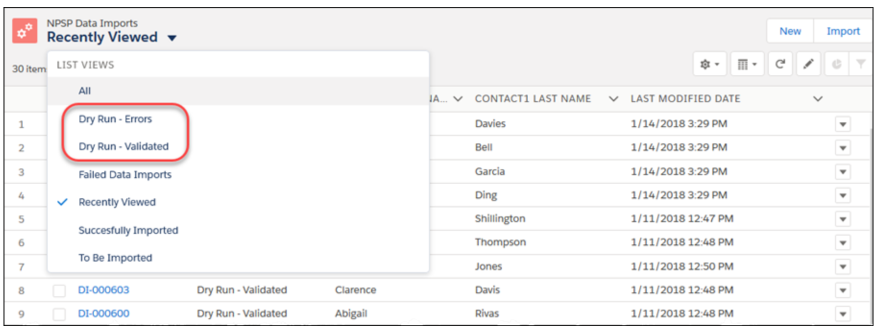
4. Wait for the status page to show a status of Completed and a summary of the results.



If some records had errors during the dry run, it would look similar to this:



5. Click **Close** to return to either the NPSP Data Imports tab (if you started the dry run from the To Be Imported list view) or the batch record.
6. Dry run records have two possible statuses: `Dry Run - Validated` or `Dry Run - Error`. Use the list views with these names to review the records that were part of the dry run. From there, you can drill down into a record to see more information.

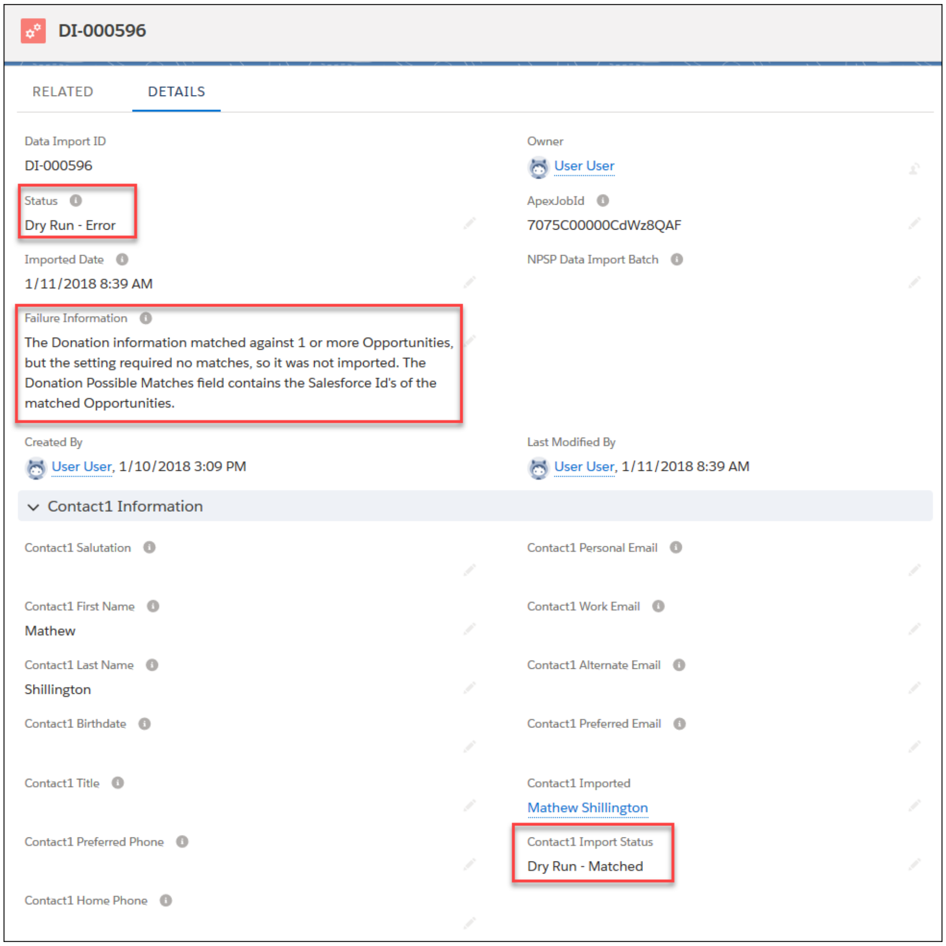


Within a record, you'll see the overall status and the different Import Statuses for each item the dry run tried to match against.

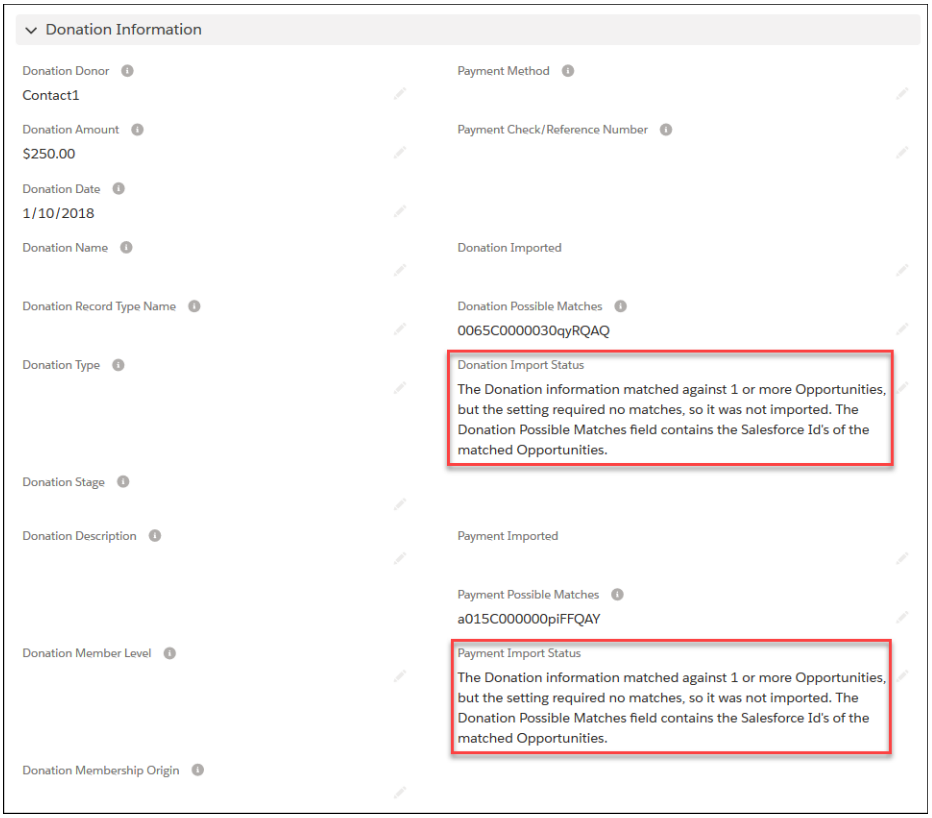
- **Dry Run - Matched**
- **Dry Run - Matched None**
- **Dry Run - Best Matched Used** (used for Donations only)
- **Dry Run - Matched by Id** (used for Donations only)
- **Ignored** (used only for Addresses)

If your dry run had errors, you'll also see them in the Import Status fields.

For example, in this record the overall status is **Dry Run - Error** because even though the Contact1 was matched, there was an error with the Donation.



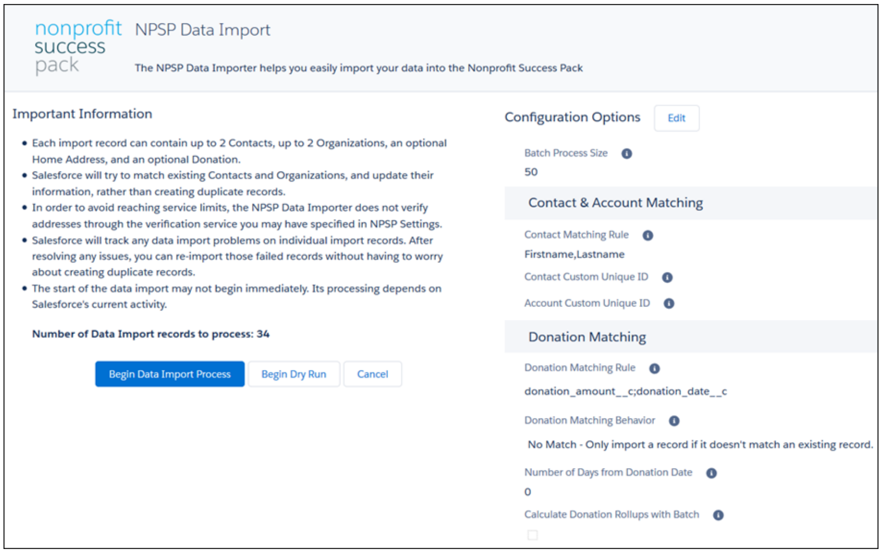
If you scroll down to the Donation section, you also see the specific errors in the Import Status fields.



Import Your Data

Run the NPSP Data Importer tool to bring data from the NPSP Data Import custom object into Salesforce.

1. In the NPSP Data Imports tab, make sure the To Be Imported List View is selected.
2. In the upper right corner of the page, click **Start Data Import**.
3. On the summary page, review the number of records that Salesforce will process.



The importer always attempts to process all NPSP Data Import records that don't have an "Imported" status, including all records that have a "Failed" status. (Import isn't limited to the records displayed in the To Be Imported view.)

4. If you want to change the batch process size or rules used to match duplicate records, click **Edit**, change the default configuration options, then click **Save**. See Appendix D: Configure Data Importer Options for details.

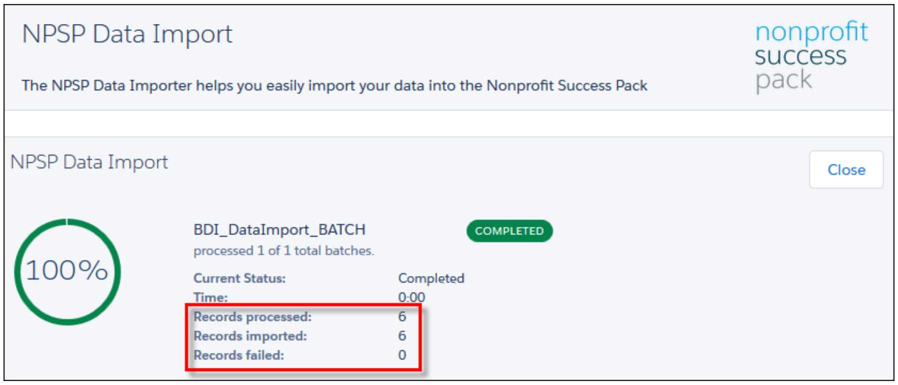
> **Note**
> If you included a Salesforce ID in a Contact Imported field, the ID will be used for matching regardless of your selection in the `Contact Matching Rule` field.

5. Click **Begin Data Import Process**.

You can monitor progress on the status page as the import proceeds; it may take a few minutes for the import to start.

> **Important**
> We recommend you leave this tab open until the import finishes so that you can see the detailed results.

6. Wait for the status page to show a status of Completed and a summary of the results.



7. Click **Close** to return to the NPSP Data Imports tab.
8. Review your imported records and verify that your data was imported correctly. If import failed for a record, check that record's Failure Information field to see the error. For more help with errors, post a question in the Power of Us Hub.

> **Important**
> If you set the **Donation Matching Behavior** (in the Configuration Options) to either `No Match`, `Single Match`, or `Best Match` and the Data Importer can't match against an existing Opportunity or Payment, the status of the Data Import will show "Failed." However, any associated Account or Contact from the Data Import will still be created. You can evaluate the Opportunity or Payment that failed and rerun the Data Importer.

Delete Imported Records

After you've successfully imported your records, you can optionally reduce data storage by deleting the intermediate data in the NPSP Data Import object. Deleting the intermediate data in the NPSP Data Import object does **not** delete your new Account, Contact, or Opportunity donation records.

If you're using Batch Gift Entry to enter donations, we DO NOT recommend using the Delete All Data Import Records or Delete All Imported Records actions. See the Batch Gift Entry documentation for more details.

Make sure your data was imported successfully before you delete data in the NPSP Data Import object.

1. In the NPSP Data Imports tab, select a view of your imports.
2. In the upper right corner, click one of the following:

Note

Depending on how Actions are organized in your page layout, you may need to click in order to see the Delete options.

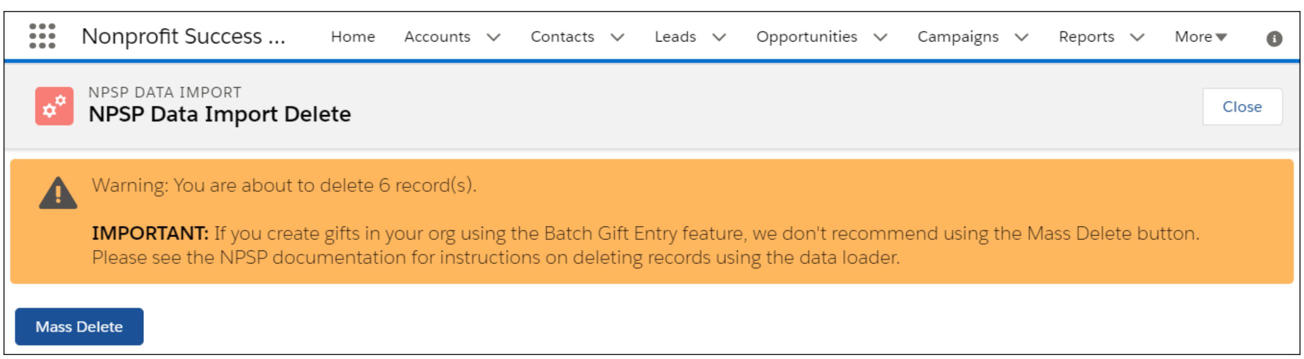
- Click **Delete All Data Import Records** to delete all intermediate data in the custom object, regardless of its import success status.
- Click **Delete Imported Data Import Records** to delete intermediate data that was successfully imported.

Note

If you see an Insufficient Privileges error when trying to delete, you Admin needs to:

- Add your profile to the Enabled profiles for the `BDI_DataImportDeleteBTN` Visualforce page. Access the list of Enabled Profiles in Setup by searching for `Visualforce Pages`. Next to `BDI_DataImportDeleteBTN`, click **Security**.
- Grant your profile Delete access for the NPSP Data Imports object.

3. You see a count of the records you're about to delete. If you're ready to delete them, click **Mass Delete**.



Deleted records are sent to the Recycle Bin.

Find More Help

The Power of Us Hub is Salesforce.org's vibrant, online community, where your fellow nonprofits discuss all questions great and small. In the Hub you will find:

- Questions and answers on virtually everything related to Salesforce and nonprofits
- Specialized Chatter groups dedicated to the types of nonprofits you're interested in
- Product documentation, workbooks, and helpful tips
- The most knowledgeable experts on Salesforce and nonprofits, anywhere in the world

To access the Hub, visit http://powerofus.force.com. Use your Salesforce username and password to log in–no other credentials are required!

Appendix A: Make the NPSP Data Imports Tab Visible

If you can't see the NPSP Data Imports tab, even after you've clicked the plus (+) icon next to your main tabs, edit your profile to set the tab to Default On.

Note
The following steps assume you're using the Enhanced Profile User Interface. If you're using the Original Profile Interface, the path to these settings and the actions you take are slightly different.

1. Click , then click **Setup**.
2. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
3. For each profile that you want to give access to, click the name of the profile. (For example, click System Administrator. Do **not** click the Edit button to the left of the profile name.)
4. Once you're on the Profile page, click **Object Settings**.
5. In the list of objects, click **NPSP Data Imports**.
6. On the NPSP Data Imports page, click **Edit**.
7. In the Tab Settings section, set the option to Default On.
8. In the Object Permissions section, and select Read, Create, Edit, and Delete.
9. In the Field Settings section, select the Read Access and Edit Access checkboxes for all field names.
10. Scroll to the top of the page and click **Save**.

Remember, to give other profiles (aside from System Administrator) access to the NPSP Data Imports tab, repeat the above process for each of those profiles.

Appendix B: NPSP Data Import Fields

This appendix includes reference information about the fields in the NPSP Data Import object, especially requirements for date fields.

The NPSP Data Import object contains Contact, Account, Address, Opportunity, Payment, and other fields for import. Separate fields contain up to two Contacts and two Accounts for each record. The majority of the fields are optional, and the NPSP Data Importer will use smart default values for fields that contain no data.

Important
Make sure your dates are in the format supported by your data import tool.

- If you're using the Salesforce Data Import Wizard for your import, use dates in your locale format. In the US, this means MM/DD/YY. For example: 12/31/14.
- If you're using the external Salesforce (Apex) Data Loader tool for your import, use the YYYY-MM-DD date format. This format is *not* the native Excel date format, and you'll need to reformat all of the columns that contain dates. See this Help and Training article for more information.

Contact Fields

The Contact fields define information about the primary Contact. Salesforce automatically creates a Household Account for each new Contact1 that you enter.

These are the fields in the NPSP Contact1 object.

Field Label	Description	Required or Default Behavior
Contact1 Salutation	The salutation for the Contact, such as Mr., Mrs., Dr., and so on.	Optional.
Contact1 First Name	The Contact's first name.	Optional.
Contact1 Last Name	The Contact's last name.	Required, if you are including any other fields from Contact1.

Field Label	Description	Required or Default Behavior
Contact1 Birthdate	The Contact's birthdate.	Optional. Use the correct date format supported by your import tool.
Contact1 Title	The Contact's title.	Optional.
Contact1 Personal Email	The Contact's personal or home email.	Optional, but matching to existing Contacts by Email requires at least one of the Email fields to be provided in order to find a match.
Contact1 Work Email	The Contact's work email.	Optional, but matching to existing Contacts by Email requires at least one of the Email fields to be provided in order to find a match.
Contact1 Alternate Email	An additional email for the Contact.	Optional, but matching to existing Contacts by Email requires at least one of the Email fields to be provided in order to find a match.
Contact1 Preferred Email	Specifies which of the three Email fields is the preferred one to use for communication with the Contact. If specified, it must match one of the picklist values: Personal, Work, or Alternate.	Optional.
Contact1 Home Phone	The Contact's home phone.	Optional.
Contact1 Work Phone	The Contact's work phone.	Optional.
Contact1 Mobile Phone	The Contact's mobile phone.	Optional.
Contact1 Other Phone	The Contact's other phone.	Optional.
Contact1 Preferred Phone	Specifies which of the four Phone fields is the preferred one to use for calling the Contact. If specified, it must match one of the picklist values: Home, Work, Mobile, or Other.	Optional.
Contact1 Imported	The Contact's Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.

The same fields exist for Contact2, and you use them the same way to add or update a secondary member of the household.

Household Fields

The Household fields define information about Contact1 and Contact2's Account record, which is their Household.

These are the fields in the NPSP Data Import object that map to a Household Account record. We provided the Household Phone field as an example to follow if you want to set up additional custom fields for the Household. To create additional fields, follow the directions in Appendix C: Import Additional Fields.

Field Label	Description	Required or Default Behavior
Household Phone	The Household's phone number	Optional.
Household Account Imported	The Household account's Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.

Account Fields

The Account1 and Account2 fields are used to match or create Organizational Accounts, and to create an affiliation between the appropriate Contact and Organizational Account. The organization for Account1 will be entered into the **Primary Affiliation** field for Contact1, and NPSP will create an Affiliation record representing this connection. Likewise, Account2 will be entered as the **Primary Affiliation** for Contact2. The Account1 and Account2 address fields are used to update the Organizational Account, not the Contact (Household) Address.

Important
The Account fields in the template are used to create optional **Organizational Accounts** with which the related Contacts are affiliated. **Don't enter Household information in the template's Account fields, because the Account fields are for Organizational Account information only**.

These are the fields in the NPSP Account1 object.

Field Label	Description	Required or Default Behavior
Account1 Name	The Account's name.	Required, if you are including any other fields from Account1.
Account1 Street	The Account's billing street.	Optional.
Account1 City	The Account's billing city.	Optional.
Account1 State/Province	The Account's billing state or province.	Optional.
Account1 Zip/Postal Code	The Account's billing Zip/ postal code.	Optional.
Account1 Country	The Account's billing country.	Optional.

Field Label	Description	Required or Default Behavior
Account1 Phone	The Account's phone.	Optional.
Account1 Website	The Account's website.	Optional.
Account1 Imported	The Account's Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.

The same fields exist for Account2, and you use them the same way.

Home Address Fields

If any of the Home Address fields are specified, Salesforce will create an Address object for the Household, and will copy the address to each Contact's Mailing Address fields, and the Household Account's Billing Address fields.

These are the fields in the NPSP Home Address object.

Field Label	Description	Required or Default Behavior
Home Street	The household's street	Optional.
Home City	The household's city	Optional.
Home State/Province	The household's state or province	Optional.
Home Zip/Postal Code	The household's Zip/postal code	Optional.
Home Country	The household's country	Optional.
Home Address Imported	The Address's Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.

Donation Information Fields

If any of the Donation Information fields are specified, Salesforce will create an Opportunity and will associate it with either Contact1 (and the Contact's Household), or Account1.

These are the fields in the NPSP Donation Information object.

Field Label	Description	Required or Default Behavior
Donation Donor	"Contact1" if an individual donation, or "Account1" if an organizational donation.	Optional. Will be treated as "Contact1" if left empty.

Field Label	Description	Required or Default Behavior
Donation Amount	The donation amount.	Required, if you are including any other fields for Donation Information.
Donation Date	The date you received the donation.	Optional. Will use the current date if left empty. Use the date format supported by your import tool.
Donation Name	A unique name to identify the donation.	Optional. Will be automatically generated by the NPSP if left empty.
Donation Record Type Name	The name of an Opportunity Record Type to use for the donation.	Optional. Will use the Salesforce User's default Opportunity Record Type if left empty.
Donation Type	The type of donation.	Optional. Must match values in corresponding picklist.
Donation Stage	The stage of the donation opportunity.	Optional. Must match values in corresponding picklist. Will use an active Closed Won Stage if left empty, meaning that the donation has been completed.
Donation Description	A description of the donation.	Optional.
Donation Member Level	The member level corresponding to the donation.	Optional. Must match values in corresponding picklist.
Donation Membership Origin	The origin of the donor's membership.	Optional. Must match values in corresponding picklist.
Donation Membership Start Date	The start date of the membership if the donation is for membership.	Optional. Use the correct date format supported by your import tool.
Donation Membership End Date	The end date of the membership if the donation is for membership.	Optional. Use the correct date format supported by your import tool.
Donation Campaign Name	A Campaign to associate the Donation with.	Optional. If specified will try to match to an existing Campaign by name. If no match found, will create a new Campaign.
Donation Campaign Source	The Salesforce ID of a Campaign to associate the Donation with.	Optional. If specified, will match an existing Campaign by Campaign ID. If both the Donation Campaign Name and Donation Campaign Source are specified, NPSP will use the ID from the Donation Campaign Source.
Payment Method	The method of payment used for the donation.	Optional. If Payments are enabled, will copy this value to the Opportunity's Payment object. Must match values in corresponding picklist.
Payment Check/ Reference Number	The check or payment number for the donation.	Optional. If Payments are enabled, will copy this value to the Opportunity's Payment object.

Field Label	Description	Required or Default Behavior
Donation Imported	The Donation (Opportunity's) Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.
Donation Possible Matches	A comma separated list of Salesforce IDs of Opportunities that matched the Data Import record's Donation Matching fields.	Automatically populated by NPSP.
Payment Imported	The Payment's Salesforce ID to match against.	Optional. If not populated with an ID prior to import, NPSP will automatically populate after dry run or processing.
Payment Possible Matches	A comma separated list of Salesforce IDs of Payments that matched the Data Import record's Donation Matching fields.	Optional.

Campaign Member Fields

If any of these are specified, Salesforce will add or update a Campaign Member record.

These are the Campaign Member fields.

Field Label	Description	Required or Default Behavior
Campaign Name	The name of the Campaign the Campaign Member is part of.	Optional.
Campaign Member Status	Indicates a person's status in a Campaign (e.g. sent or responded).	Optional. Must match values in corresponding picklist.

System Fields

The System fields capture information about the import including import statuses and information about the NPSP Data Import record. Unless noted otherwise in the table below, the possible statuses for each target object (Account, Contact, Opportunity, etc.) are:

- **Matched**: The imported record matched an existing Salesforce record.
- **Created**: A new record was created because matching is disabled OR there were no matching records in Salesforce.
- **Best Match Used**: More than one existing record in Salesforce matched the imported record.

- **Matched by Id:** Either the Salesforce ID for the record was included in the import file and used to match an existing Salesforce record or Dry Run found the record ID.
- **Match None**: Only used during Dry Run. There are no records in Salesforce that match the value listed in the field. A new record will be created when the import is processed.
- Any System errors which caused an issue with this import.

Field Label	Description	Required or Default Behavior
Account1 or Account2 Import Status	Indicates if an Account was created or matched an existing Account.	Automatically populated by NPSP.
ApexJobId	The ApexJobID of the Batch Job that processed the record.	Automatically populated by NPSP.
Contact1 or Contact2 Import Status	Indicates if a Contact was created or matched an existing Contact.	Automatically populated by NPSP.
Created By	The Salesforce User who created the NPSP Data Import record.	Automatically populated by NPSP.
Data Import ID	The auto-numbered name of the NPSP Data Import record.	Automatically populated by NPSP.
Donation Campaign Import Status	Indicates if a Campaign in the Donation Campaign Source or Donation Campaign Name field matched against an existing Campaign or if a new Campaign was created.	Automatically populated by NPSP.
Donation Import Status	Indicates if an Opportunity was created or matched an existing Opportunity. If you see the Best Match Used status, we used the best match that falls within the **Number of Days from Donation Date** specified AND is closest to the Donation Date.	Automatically populated by NPSP.
Failure Information	Description of what caused the NPSP Data Import record to fail to be imported.	Automatically populated by NPSP.
Home Address Import Status	Indicates if a Household Address was created or matched an existing Address.	Automatically populated by NPSP.

Field Label	Description	Required or Default Behavior
Imported Date	The date and time the NPSP Data Import record was successfully imported.	Automatically populated by NPSP.
Last Modified By	Salesforce User who last updated the NPSP Data Import record.	Automatically populated by NPSP.
NPSP Data Import Batch	Lookup to the NPSP Data Import Batch this record belongs to. If you'd like to add files in your CSV to an NPSP Data Import Batch, include the batch's Salesforce ID in this column.	Optional or automatically populated by NPSP.
Owner	Salesforce User is the Owner the NPSP Data Import record.	Automatically populated by NPSP.
Payment Import Status	Indicates if a Payment was created or matched an existing Payment. If you see the Best Match Used status, we used the best match that falls within the **Number of Days from Donation Date** specified AND is closest to the Donation Date.	Automatically populated by NPSP.

<table>
<tr><th>Field Label</th><th>Description</th><th>Required or Default Behavior</th></tr>
<tr><td>Status</td><td>Indicates the result of the Dry Run or Data Import processing. Possible statuses are:
Imported–The NPSP Data Import Record was successfully processed in Salesforce.
Failed–The NPSP Data Import Record was not imported.
Dry Run - Validated–Dry Run was successful and the record is ready to be imported into the appropriate objects.
Dry Run - Error–Dry Run was unsuccessful and the NPSP Data Import record will not be processed until errors are resolved.
Any System errors which caused an issue with this import.</td><td>Automatically populated by NPSP.</td></tr>
</table>

Appendix C: Import Additional Fields

You can import additional fields, such as standard fields, Nonprofit Success Pack fields, your own custom fields, or even fields from a managed package. Add these fields to the NPSP Data Import object, and then add a corresponding column to your template file so they're included during import.

Important
For every additional field you want to add to the NPSP Data Import object, you must specify a value for the field's Help Text and you must follow a specific naming convention for the Help Text value. The NPSP Data Importer will import the field only if Help Text has the correct value.

Let's walk through an example of this process. Save the World would like to have a custom field for the Contact's favorite color, and include that information in their spreadsheet and import process. As the Salesforce Administrator, you'll need to do three things in order to add the custom field to the process:

- Create or find the existing field you want to map
- Create a corresponding field on the NPSP Data Import object
- Update your CSV spreadsheet with the new field

The rest of this appendix walks you through these three main tasks.

Create or Find the Field You Want to Map

You can import either newly-created fields or existing fields.

Note
In the NPSP Data Import process, you can reference additional fields on the following objects only:

- Account (Organization or Household)
- Address (Household Accounts only, through Home Address fields)
- Contact

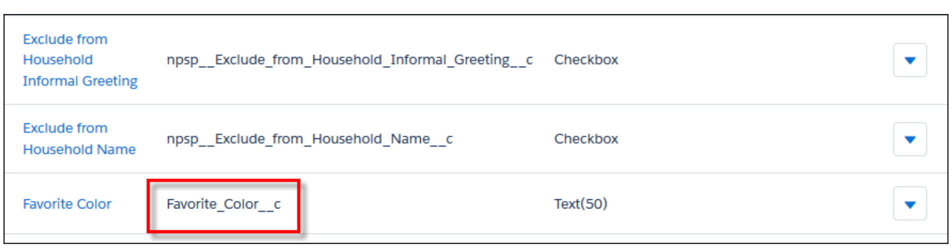
- Opportunity
- Payment

Create a New Custom Field

For our example, let's create a custom text field to capture the Contact's favorite color.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click **Contact**.
4. Click **Fields & Relationships.**.
5. Click **New**.
6. Select `Text` and Click **Next**.
7. Complete this information:
    a. **Field Label**: `Favorite Color`
    b. **Length**: `50`
    c. **Field Name**: `Favorite_Color`
    d. Fill in **Description** and **Help Text** if needed; they're not required here.
8. Click **Next**.
9. Click **Next** again to accept default security.
10. Click **Save**.

The custom field now exists within Salesforce and you see it in the Contact Fields & Relationships list. Take note of the text in the API Name column. Copy the text from the API Name column to your clipboard or a separate note as you'll need it shortly. In this case, it's Favorite_Color__c.



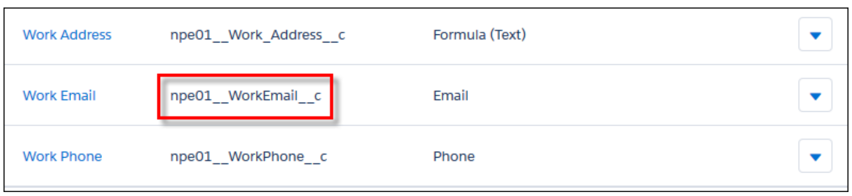
Exclude from Household Informal Greeting	npsp__Exclude_from_Household_Informal_Greeting__c	Checkbox
Exclude from Household Name	npsp__Exclude_from_Household_Name__c	Checkbox
Favorite Color	Favorite_Color__c	Text(50)

For more detail on creating custom fields, see Salesforce Help & Training.

Find the API Name of an Existing Field

If you want to map to an existing field instead of a new custom field, you just need to find the API Name and copy it to your clipboard.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click **Contact**.
4. Click **Fields & Relationships**.
5. Find the field you want to map.
6. Copy the API Name to your clipboard. For example, if you want to import the Work Email field, you would copy npe01__WorkEmail__c to your clipboard.



Note that fields from the Nonprofit Success Pack packages begin with namespace prefixes such as `npe01__` or `npsp__` while custom fields you create do not have a prefix. The complete API name includes both the namespace prefix (if one exists) and the trailing `__c` (double underscore 'c').

Create a Corresponding Field on the NPSP Data Import Object

Now we want to create a corresponding custom field on the NPSP Data Import object for our primary Contact's favorite color. The field must exist in both places because we need to map one to the other.

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click **NPSP Data Import**.
4. Click **Fields & Relationships**.
5. Click **New**.

6. Select `Text`.

> **Note**
> You must select the same field type as the custom field you're mapping to, *except* when the field you're matching is a relationship field (lookup or master/detail) or checkbox field. For example, if the field on the Contact record was a Date field, you'd select `Date` here. Read more about mapping relationship fields or checkbox fields in the sections below.

7. Complete this information:

   a. **Field Label**: `Contact1 Favorite Color`

   It doesn't matter what you name this field (unless it's a Unique ID field) but pick a label that makes it clear which record this maps to. We're picking something really obvious here–words that map exactly to the custom field we created in the previous section.

   > **Note**
   > If the field is a marked as a Unique ID field, then the naming does matter. If the field isn't named correctly, it won't show up in the Data Import Configuration Options. For more information and an example, see Important Information about Unique ID Fields below.

   b. **Length**: `50`

   c. **Field Name**: `Contact1_Favorite_Color`

   d. **Help Text**: `Contact1.Favorite_Color__c`

   This help text is *critical* and it's what will allow for the mapping to the Contact object. The Help Text field specifies the object instance and field name that you want to copy the data to, using the format ObjectInstance.Fieldname. (That last part is the API Name you copied to your clipboard, after creating the custom field in the previous section.)

   ObjectInstance must be one of the following:

   - Contact1
   - Contact2
   - Account1
   - Account2
   - Household

    - Opportunity (the donation fields)
    - Address (for the home address fields)
    - Payment

    Fieldname must be the full API Name, including a namespace and/or the trailing __c, if needed.

8. Click **Next**.
9. Click **Next** again to accept default security.
10. Click **Save**.

Map Relationship Fields

Relationship fields–lookup or master/detail–must be mapped as Salesforce IDs. This includes the standard Owner field, which is related to the User object. For a relationship field, the NPSP Data Import field should be a `Text` field of 18 characters to accommodate the 15 or 18 digit Salesforce ID (not the Name) of the related record.

Map Checkbox Fields

Checkbox fields get a little squirrelly when you're trying to process them in a data import tool. In order to allow you more flexibility around checkbox fields in **NPSP Data Import**, the corresponding field should be a picklist.

This picklist translates what you want to see in the checkbox field (the checkbox as checked or unchecked) to their Boolean equivalents (True for checked and False for unchecked). Through **NPSP Data Import**, you'll be able to uncheck a previously checked checkbox field or even leave a checkbox field completely unchanged by leaving that cell empty.

We'll walk through this for the Private checkbox on the Opportunity object, but remember, you can do this with any custom or standard checkbox field. To map the Private checkbox field to the **NPSP Data Import** object:

1. Click , then click **Setup**.
2. Click the **Object Manager** tab.
3. In the list of objects, click **NPSP Data Import**.
4. Click **Fields & Relationships**.
5. Click **New**.
6. Select `Picklist`.
7. Complete this information:

- Field Label: `Donation is Private`

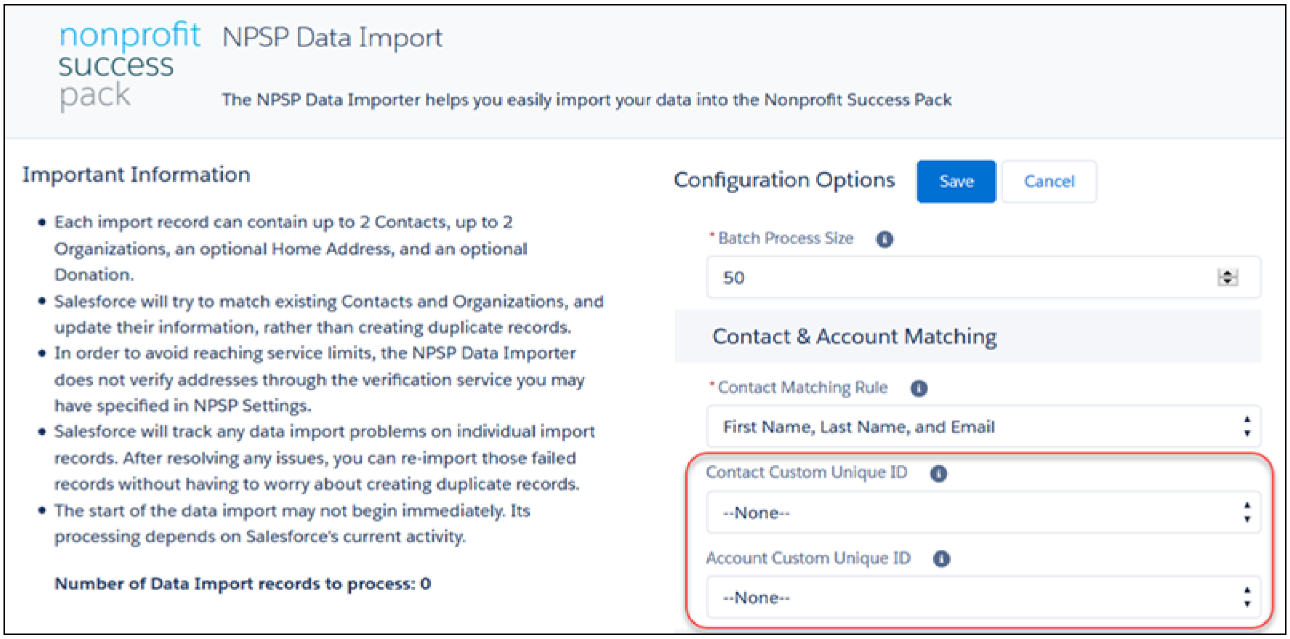
  You can choose a different name here, but pick a label that makes the mapping clear.
- Select **Enter values, with each value separated by a new line** and enter the following values:
  - `True`
  - `False`
- Field Name: `Donation_is_Private`
- Help Text: `Opportunity.IsPrivate`

  This must match the object and field name, using the format ObjectInstance.Fieldname. The information you enter into this field links the field in **NPSP Data Import** to the appropriate field on your chosen object.

8. Click **Next**.
9. Click **Next** again to accept default security.
10. Click **Save**.

Important Information about Unique ID Fields

As mentioned above, naming is important when you're creating corresponding Unique ID fields. In order to see any values in the Contact Custom Unique ID or Account Custom Unique ID fields in the Data Importer Configuration options, the field you want to map must be marked as Unique and External ID. Additionally, for Unique ID fields, you must create two corresponding fields, one for Contact1 and one for Contact2 (or Account1 and Account2) and they must be named properly. The corresponding fields should NOT be marked as Unique and External ID.



For example, say you created a custom Unique ID field on Contacts called `Reference ID` with an API name of `Reference_ID__c` that you want to use for matching Contacts during data import. You'll need to create two corresponding NPSP Data Import fields using the **exact format** listed below:

Field 1

Field Label: Contact1 <Fieldname> (Example: Contact1 Reference ID)

Field Name: Contact1_<Fieldname> (Example: Contact1_Reference_ID)

API Name: Contact1_<FieldName>__c (Example: Contact1_Reference_ID__c)

Help Text: Contact1.<FieldName>__c (Example: Contact1.Reference_ID__c)

Field 2

Field Label: Contact2 <Fieldname> (Example: Contact2 Reference ID)

Field Name: Contact2_<Fieldname> (Example: Contact2_Reference_ID)

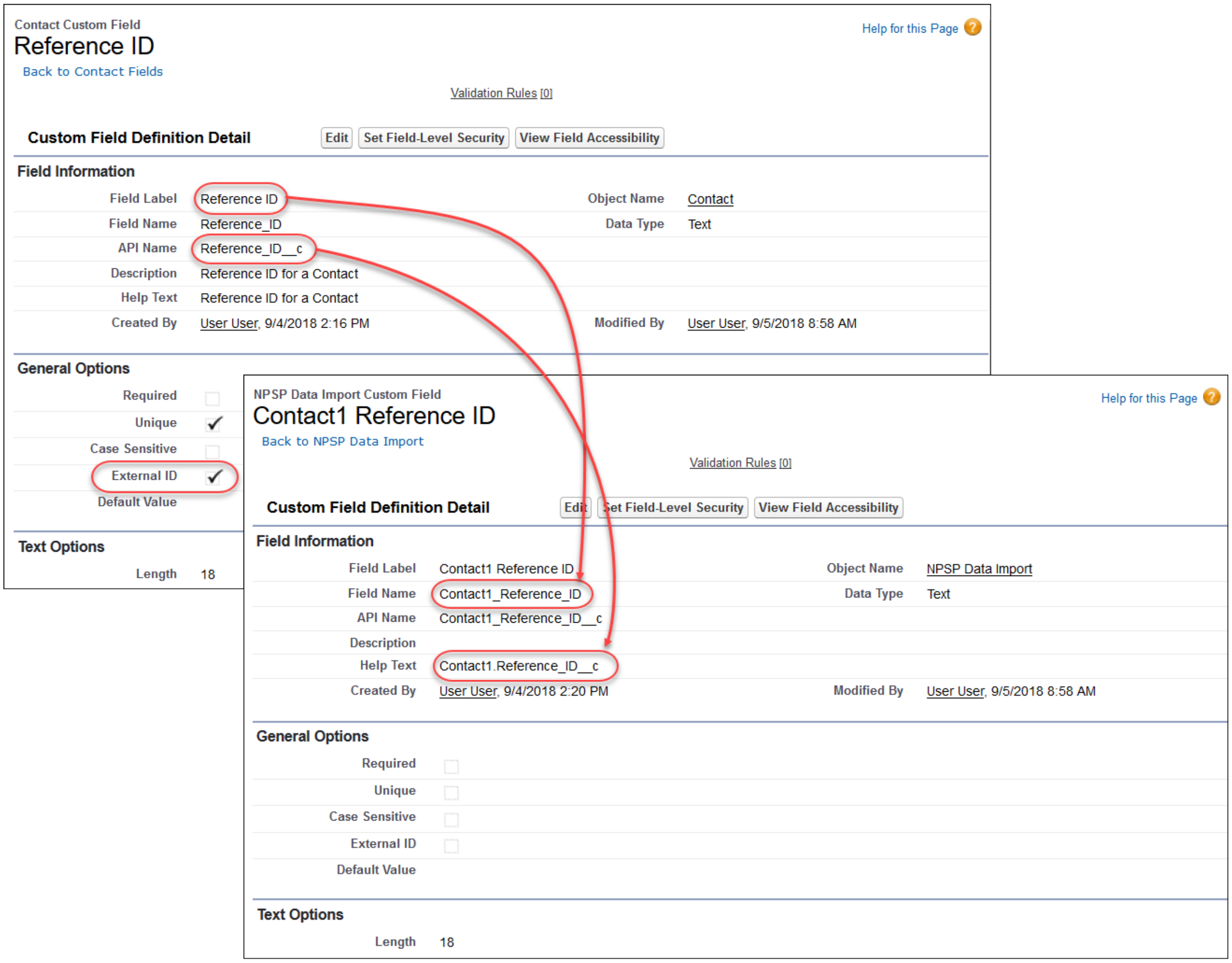
API Name: Contact2_<FieldName>__c (Example: Contact2_Reference_ID__c)

Help Text: Contact2.<FieldName>__c (Example: Contact2.Reference_ID__c)

Note

Creating only one corresponding field (instead of two) will result in an error.

Here is an image showing the custom Contact field `Reference ID` and the corresponding NPSP Data Import field `Contact1 Reference ID` with correct naming. The image also shows that the Contact field `Reference ID` is marked as an External ID field.



Again, only when your custom Contact or Account field is a Unique ID field AND both the fields needed on the NPSP Data Import object have been mapped and named correctly will you see the custom Contact or Account field in the drop down menu. Additionally, keep in mind that Last Name is required when trying to match Contacts using an External ID, as the Last Name is used when the External ID field isn't found. Account Name is required when trying to match Accounts using an External ID, as the Account Name is used when the External ID field isn't found.

Update Your CSV with the New Field

Your import spreadsheet needs to include a new column for the field you created **on the NPSP Data Import object**, not the original custom field.

If you're using the Data Import Wizard, the column should use the Field Label. If you're using the Data Loader or other API tool, the column should use the API Name. So in our example, you would add a column with the Header text as:

- `Contact1 Favorite Color` (if using Data Import Wizard)
- `CONTACT1_FAVORITE_COLOR__C` (if using Data Loader)

Appendix D: Configure Data Importer Options

Customize and configure your Nonprofit Success Pack data import options.

Access configuration options on the NPSP Data Import summary page.

- **Batch Process Size**–The number of NPSP Data Import records you want Salesforce to process in each batch. The default is 50 records. If Data Import records fail to import due to system errors such as too much CPU time, reduce the batch process size and try again.

Also see Import Your Data.

Contact & Account Matching Options

These configuration options are for matching Accounts or Contacts:

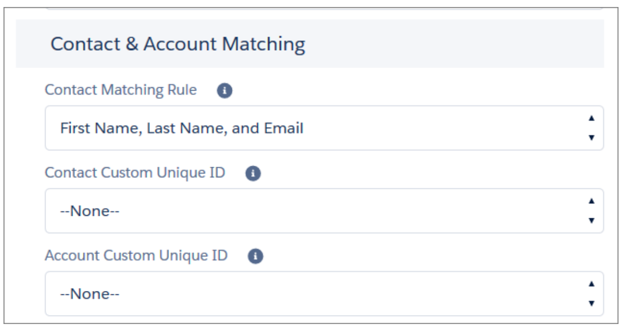
> **Important**
> In order to see values in either the Contact Custom Unique ID or Account Custom Unique ID fields, you must first create a custom Unique ID field and then create two corresponding Data Import fields with specific values. If you don't create these fields properly, you will get an error. For more information, see "Important Information about Unique ID Fields" within Create a Corresponding Field on the NPSP Data Import Object.

- **Contact Matching Rule**–Specifies how to match Contacts in NPSP Data Import records against existing Contacts. The rules specify which set of Contact fields to use to find matches. For example: First Name, Last Name, and Email or First Name, Last Name, and Phone. (Keep in mind that the phone number format has to be an exact match. For example, if all of the phone numbers in your database are formatted as 123-345-4567, then you must use that format, not 123.345.4567 or 1233454567.)
- **Contact Custom Unique ID**–Optional ID field used for matching Contacts. This field can be any custom text or numeric field that uniquely identifies a Contact, and is used for matching Contacts in addition to the method specified in Contact Matching Rule. This option is useful if your external data source had a unique identifier for each Contact record. For example, you could add a custom field on Contact,

such as MyOldID, and matching fields for Contacts in the NPSP Data Import object (Contact1_MyOldID, Contact2_MyOldID).

> **Note**
> If you're matching based on Salesforce ID, you don't have to set anything here. Just map data to the Imported fields, and use a Contact Matching Rule.

- **Account Custom Unique ID**–Optional ID field used for matching Accounts. This field can be any custom text or numeric field that uniquely identifies an Account, and is used for matching Accounts in addition to matching by Account Name. This option is useful if your external data source had a unique identifier for each Account record. For example, you could add a custom field on Account, such as MyOldID, and matching fields for Accounts in the NPSP Data Import object (Account1_MyOldID, Account2_MyOldID).



Donation Matching Options

You should only use donation matching to update an open Opportunity when a Payment comes in, and subsequently:

- Update the Stage of an Opportunity to Closed/Won
- Mark an open Payment as Paid

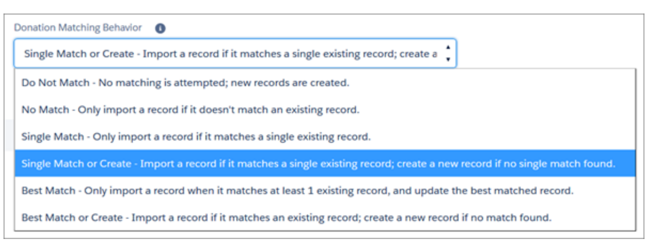
These configuration options are for matching Donations (Opportunities) or Payments:

- **Donation Matching Rule**–Specifies the set of Donation fields to use for matching against existing Opportunities and/or Payments. If no fields are selected, the Donation Date and Donation Amount fields are used. The Donation fields specified must map to either Opportunity fields or Payment fields (with the exception of `Donation Amount`, which maps to both `Opportunity.Amount` and `Payment.Payment Amount`, and `Donation Date` which maps to `Opportunity.CloseDate` and `Payment.Scheduled Date`). If the Data Import record has the `Donation Imported` field or `Payment Imported` field populated, those fields will always be used for the match.

> **Note**
> If you're using multicurrency in your org and you want to match donations, be sure to select the CurrencyIsoCode field as one of the Donation Matching Rule fields. This ensures that the proper currency is used when attempting to match donations. If you created your own custom field and set up a mapping for multicurrency, select that field instead.

- **Donation Matching Behavior**–Defines how the Data Importer should handle matching Opportunities and Payments. Must be one of the following values:
  - **Do Not Match**–No matching is attempted; new records are created.
  - **No Match**–Only import a record if it doesn't match an existing record.
  - **Single Match**–Only import a record if it matches a single existing record.
  - **Single Match or Create**–Import a record if it matches a single existing record; create a new record if no single match found
  - **Best Match**–Only import a record when it matches at least 1 existing record, and update the best matched record.
  - **Best Match or Create**–Import a record if it matches an existing record; create a new record if no match found.

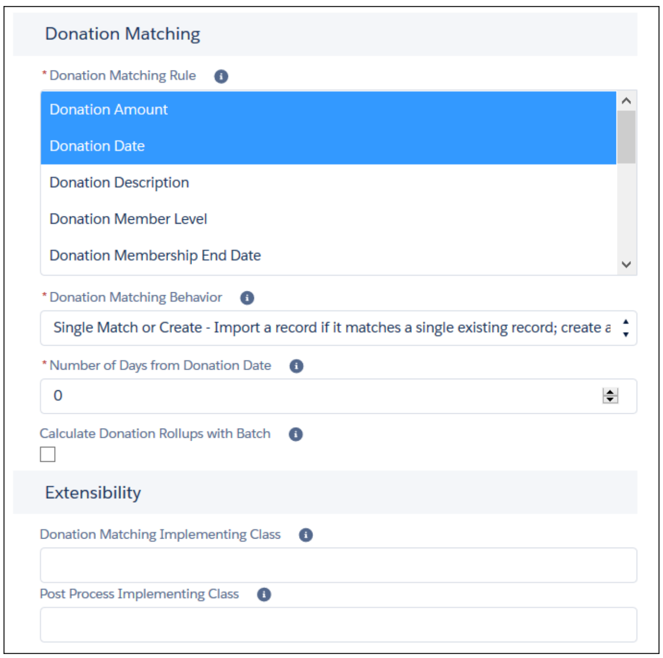
> **Important**
> If you choose `No Match`, `Single Match`, or `Best Match` and the Data Importer can't match against an existing Opportunity or Payment, the status of the Data Import will show "Failed." However, any associated Account or Contact from the Data Import will still be created. You can evaluate the Opportunity or Payment that failed and rerun the Data Importer.



- **Number of Days from Donation Date–**Specifies the number of days to consider (from the Donation date) when looking for a matching Opportunity or Payment. The Data

Importer will use the matching Opportunity or Payment that falls within the number of days specified AND is closest to the Donation Date.

- **Donation Matching Implementing Class**–The full developer name of an Apex class that implements the BDI_IMatchDonations interface, in case you are working with a developer who would like to alter this behavior. When left empty, the NPSP default implementation is used.
- **Calculate Donation Rollups with Batch**–When checked, NPSP calculates donor statistics when donations are processed as part of an NPSP Data Import Batch. If unchecked (the default), donor statistics are only calculated during the default nightly Scheduled Job. Note that selecting this checkbox may slow down processing of the batch.



Appendix E: How the NPSP Data Importer Works

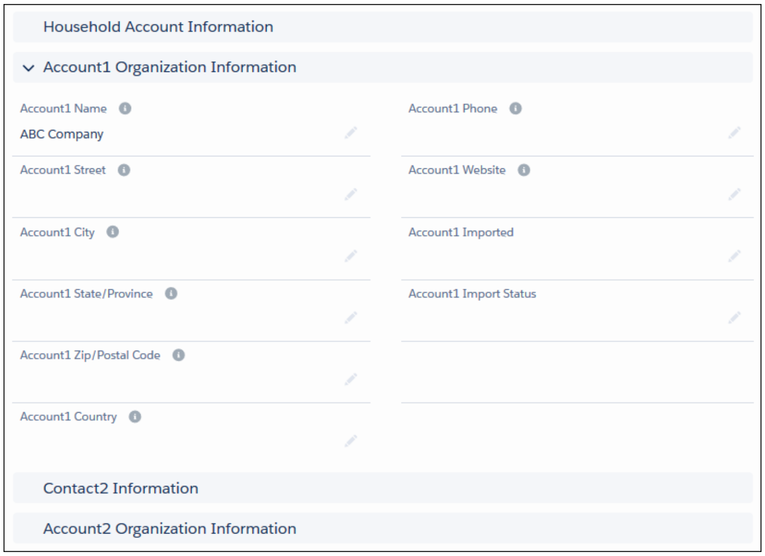
For the technically inquisitive, here's a description of how the NPSP Data Importer tool works. Knowing the details can help you debug data import problems.

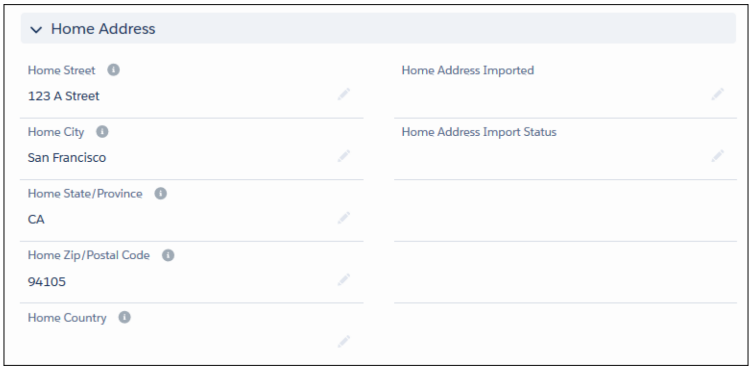
This appendix provides an overview of the NPSP Data Importer tool's operation.

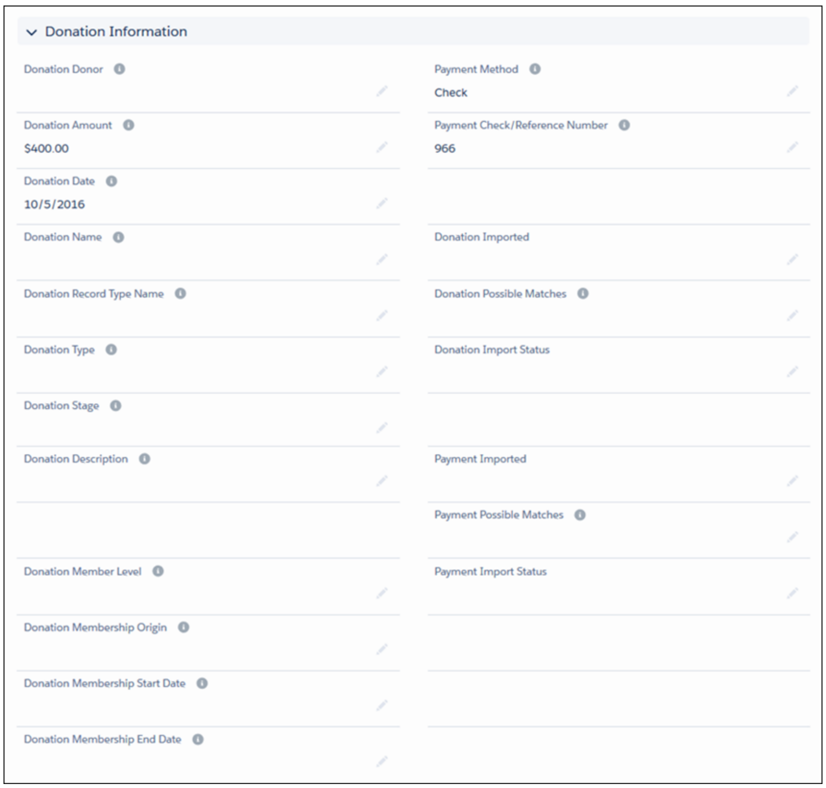
Starting with a record you've uploaded to the NPSP Data Import custom object, let's see what happens during the actual data import, as Salesforce processes the record.

Here's the record that will be imported.

Note
The Contact2, Account2, and Household sections have been collapsed to save space.







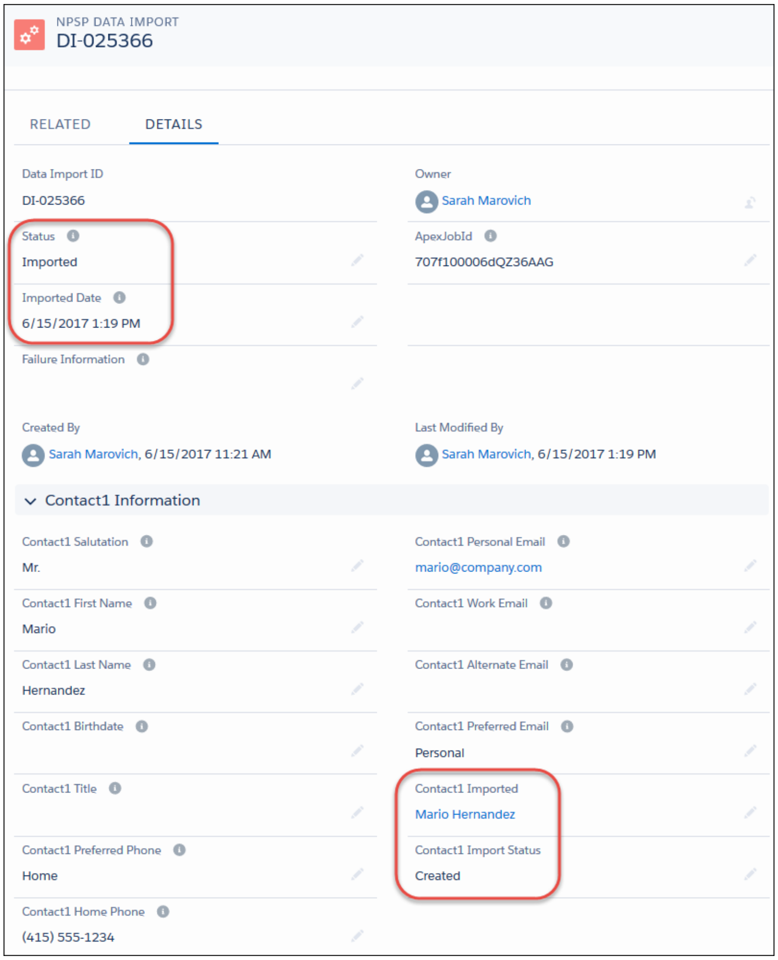
When you run the NPSP Data Importer, Salesforce does the following:

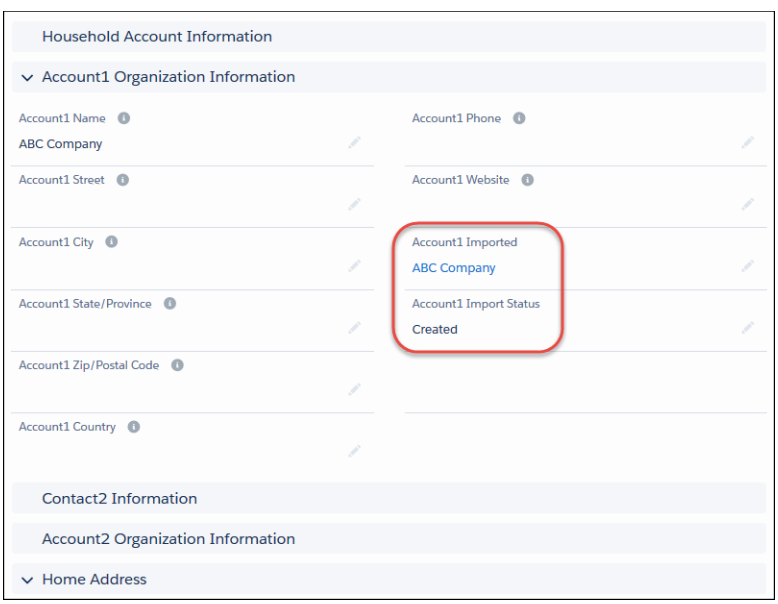
- Creates a new Contact, Mario Hernandez (after looking for an existing Mario Hernandez based on the selected Contact Matching Rule or value in Contact1 or Contact2 Imported fields).
- Creates a Household Account for Mario Hernandez (after looking for an existing Household Account for Mario Hernandez or value in Household Account Imported field).

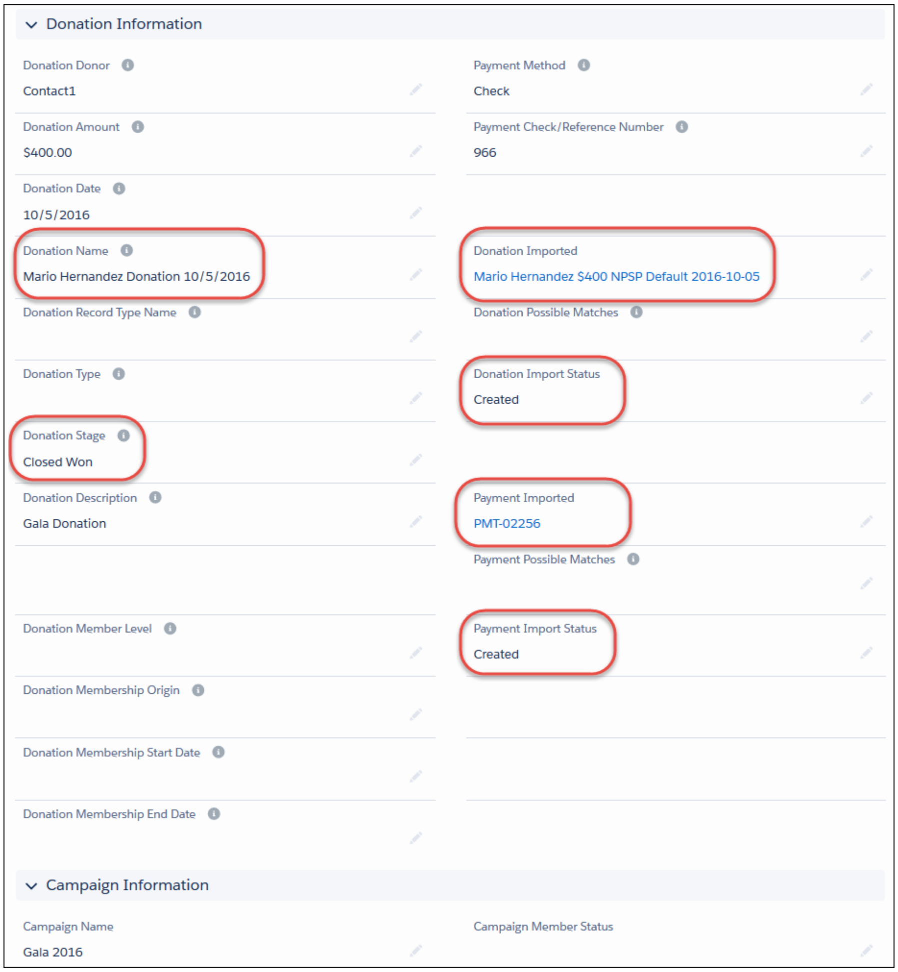
- Creates a new Organizational Account called ABC Company (after looking for an existing ABC Company account or value in the Account1 Imported or Account2 Imported fields).
- Marks ABC Company as Mario Hernandez's primary affiliation, and creates the affiliation record.
- Creates a default address object for the Household, which updates Mario Hernandez's mailing address and his Household's billing address.
- Creates a new Opportunity (using the default Opportunity record type since none was specified), assigned to Mario Hernandez's Household Account, and creates a primary OpportunityContactRole for Mario Hernandez. It also creates soft credit OpportunityContactRoles for any Household members. This is the default behavior (the Donation Matching Behavior is set to "Do Not Match"). For more information on how import works if another Donation Matching Behavior option is selected, see Donation Matching Options.
- Saves payment information on the payment record created for the new Opportunity.
- Updates the data Import record with the lookup and status of all objects created or matched.
- Creates a new Campaign called Gala 2016 (after looking for an existing Campaign with that name), and assigns the Opportunity to the Campaign.
- Adds Mario Hernandez as a Campaign Member for the Gala 2016 Campaign (after looking for an existing Campaign Member with this name).
- Since a donation is included in this import, creates a Campaign Member for Contact1 (the primary donor), after looking for an existing Campaign Member with this name. If no Campaign Member status is specified, the status is determined by the Opportunity.

  When a donation isn't included, creates Campaign Members for both Contact1 and Contact2. If you didn't specify a status for Campaign Members, NPSP uses the default status. You can include a Campaign Member Status in your import file. If the status doesn't already exist for the Campaign, NPSP creates it.

Here's how the Data Import record looks after import.


NPSP DATA IMPORT
DI-025366
RELATED
DETAILS
Data Import ID
DI-025366
Owner
Sarah Marovich
Status
Imported
ApexJobId
707f100006dQZ36AAG
Imported Date
6/15/2017 1:19 PM
Failure Information
Created By
Sarah Marovich, 6/15/2017 11:21 AM
Last Modified By
Sarah Marovich, 6/15/2017 1:19 PM
Contact1 Information
Contact1 Salutation
Mr.
Contact1 Personal Email
mario@company.com
Contact1 First Name
Mario
Contact1 Work Email
Contact1 Last Name
Hernandez
Contact1 Alternate Email
Contact1 Birthdate
Contact1 Preferred Email
Personal
Contact1 Title
Contact1 Imported
Mario Hernandez
Contact1 Preferred Phone
Home
Contact1 Import Status
Created
Contact1 Home Phone
(415) 555-1234


Household Account Information
Account1 Organization Information
Account1 Name
ABC Company
Account1 Phone
Account1 Street
Account1 Website
Account1 City
Account1 Imported
ABC Company
Account1 State/Province
Account1 Import Status
Created
Account1 Zip/Postal Code
Account1 Country
Contact2 Information
Account2 Organization Information
Home Address



Note

If you set the **Donation Matching Behavior** to a value other than `Do Not Match`, you will see a different status in the `Donation Import Status` or `Payment Import Status` fields. The value will be one of the following:

- Matched–The imported Donation or Payment matched a Donation or Payment that already existed in Salesforce.
- Created–A new Donation or Payment was created because matching is disabled OR there were no matching records in Salesforce.
- Best Match Used–More than one existing record in Salesforce matched the imported Donation or Payment. We used the best match that was identified, the falls within the **Number of Days from Donation Date** specified AND is closest to the Donation Date.