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## Bloomerang Product Knowledgebase

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– [Importing Data into Bloomerang](#)

### Permalink

The Import feature in Bloomerang allows you to upload a spreadsheet of data into your database in a few easy steps.

## Getting Started

Before you run your first import, please take a moment to read through the FAQs and Tips below.

### What kind of data can I import?

You can import Constituent info (anything on the Profile screen) to create or update Constituent records. You can also import Donation info to create new Donation records. You cannot currently import to household accounts or import Pledges, Payments, Recurring Donations, and Tasks.

### What type of file can I use for import?

#### Recent



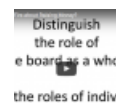
Donor  
Advised  
Funds:

A Wake Up Call  
For Fundraisers  
November 10th,  
2016



7

Productivity Tips  
That Will  
Transform Your  
Fundraising  
November 8th, 2016



[VIDEO]  
Get  
Your

Board On Fire  
About Fundraising  
November 7th, 2016

Your data must be in a .CSV (comma-separated values) file. If you have it in an Excel file, just use Excel's "Save As" option and choose to save it as a CSV file.

## How big of a file can I import?

Your import file can be up to 2,000 rows long, and a maximum of 2MB in size.

## How should my import file be set up?

Set up your file like this:

- ✓ Make sure it has a header row (i.e. a row at the top that clearly labels what data is in each column) and that each column has a heading.
- ✓ Make the headers really accurate and descriptive – that will help with mapping the import later! For example, set the heading to something like "First Name" rather than "f\_name". The closer the header names are to the name of the fields in Bloomerang, the easier the mapping will be.
- ✓ Remove all blank lines from your file.
- ✓ If you have data for both Individuals and Organizations, separate it into different spreadsheets. You'll need to import the Organization data separately from the Individual data.
- ✓ For Name data, make sure it's split out into individual components (e.g. Title, First, Middle, Last, Suffix). Remember that First Name and Last Name are required on Individual constituents; for Organization constituents, only the Organization Name is required.
- ✓ For Address data, make sure it's split out into individual components (e.g. Address, City, State, Postal)
- ✓ For Address, Email, and Phone data, separate it into different columns based on type (Home Address, Home City, Work Email, Mobile Phone, etc.)


## How does the import duplicate checking work?

It depends on what data you map in. Generally speaking, the import's duplicate checking works exactly like the duplicate checking for online donations – it tries to match on the Name first, and if that matches, then it must also match either Address or Phone. So it's always a good idea to map in Name data plus at least one of these items so that the dup checking can find existing records. If you map in Name alone, it will NOT find duplicates.

If you map in Account Number, it will use the account number in your file to find the corresponding account in Bloomerang. This is the best choice if available, because Bloomerang Account Number always works as a perfect match

The import can also find duplicates using Email alone (for example, for Constant Contact imports where there might not always be Name data available). However, be careful because although it is not recommended, sometimes multiple constituent accounts share the same email address. In this case, you could append to or overwrite fields on unintended accounts with the same email address in Bloomerang. You can try to make sure that First and Last Name info are also in your file to help alleviate this concern, but you will not be able to add new accounts in an import with email address where that email address already is in use on another constituent account in Bloomerang. These will always be seen as duplicates and either append or overwrite the data from the file onto the existing constituent account.

## Running an Import

Begin by clicking the Import icon.  Click New to create a new import template, or click on the name of an existing one if you want to simply re-run it with a new file.

For a new import:

- ✓ Type in a Name (for example, Constant Contact Import).
- ✓ Choose the type of data you're importing, Constituents or Donations. (Keep in mind that if you're importing Donations, you can also include Profile data in that import.)
- ✓ Choose whether your import file contains data for Individuals or Organizations.

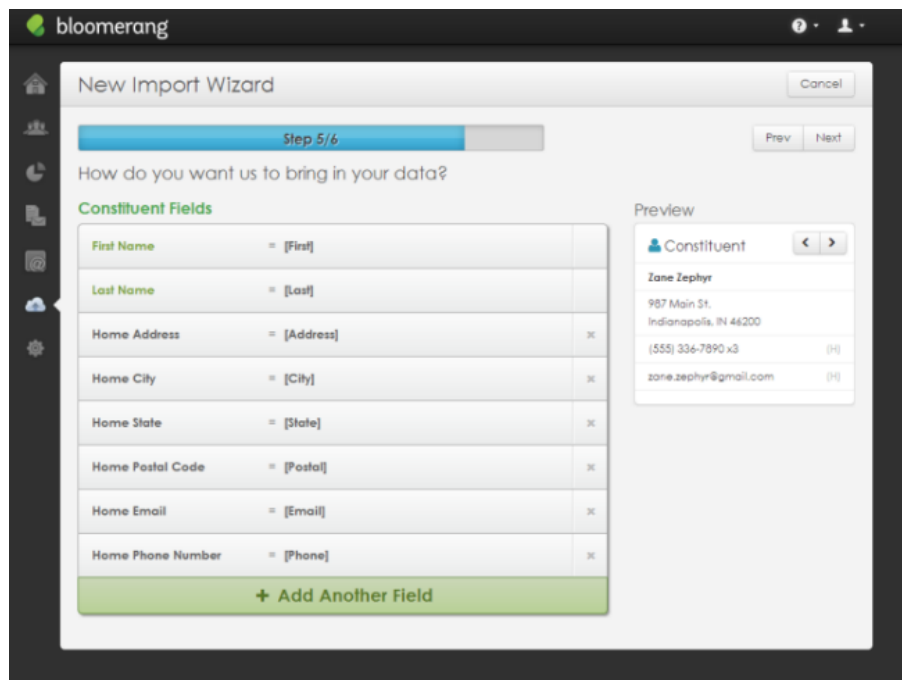
These three items will not be something you can edit after this import template is saved.

Next, select your import file from your computer. Once the file has finished uploading, you will be brought to the Mapping screen.

## Mapping Your Import

On a new import template, Bloomerang will attempt to map the columns from your file into the appropriate Bloomerang fields.

(Remember how we recommended making your header names similar to the Bloomerang field names? This is why!)

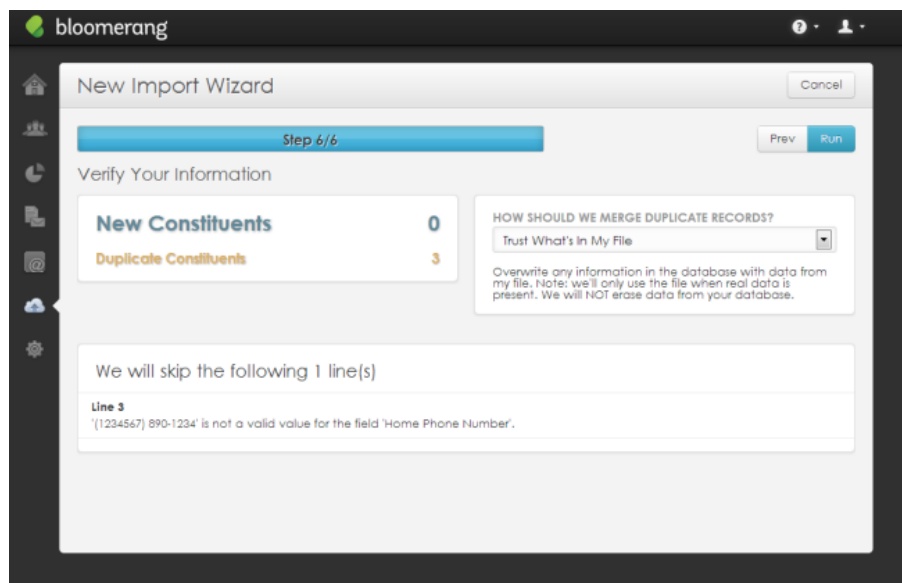


This auto-mapping may not get all of your columns mapped the way you want. To adjust the mapping of a Bloomerang field that already has a column selected, just click on it, and then change the selection of which column from your file should be mapped into that field. To map data into a Bloomerang field that is not yet mapped, click the Add Another Field button, and select the field. Then, select the column from your file that should be mapped into that field.

Use the Preview on the right side of the screen to scroll through a few records and make sure your mapping is sound. When you're ready to proceed, click Next.

## Import Preview

The step following the Mapping is a Preview of what will happen when the import runs. It shows you how many new constituents will be created, how many duplicates were found, and for donation imports, how many donations will be created.



If there are any duplicates found in your file, use the option on the right to specify how you want those to be handled. Choose “Trust What’s in My File” if you want the data in your file to overwrite existing data in the database. Choose “Trust What’s In the Database” if you want it to leave existing data in the fields alone and only add in new data in cases where the fields were blank. Please note that for Address, Phone, and Email info, the import will always create new entries on the account rather than overwriting the old address, phone, or email data.

#### Handling Errors in your File

If there are any rows in your file where the data is not correct, you’ll see them listed at the bottom of the Preview screen as errors. An example of an error might be if you have a row where required data is missing (for example, the First Name is blank) or a row where the data isn’t valid for the field it’s mapped into (for example, if Birthdate is “2/30/2013”).

Don’t worry if you have errors in your file. You can still run your import, and it will import all of the data from the rows with no errors listed. The rows that had errors will then be placed into a separate spreadsheet with the error info. After the import runs, you can download that spreadsheet, correct the errors, and then run the spreadsheet through that same import template to import the data.

#### Run Your Import!

When you’re ready to run the import, click Run!

When it finishes, you’ll see a success page. If there were any errors that were skipped, it will have a button to allow you to download the

Skipped Records file. You can also download that file from the Recently Processed Imports list on the main Import screen.

**Permalink:** [click here](#)

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#### ABOUT US

Bloomerang helps nonprofit organizations to reach, engage and retain the advocates they depend on to achieve their vision for a better world.

Our cloud-based donor management application is rooted in principles of philanthropy, simple to use and focused on empowering your team to achieve remarkable results through enhanced donor loyalty.

Bloomerang is designed to deliver maximum results, maximum utilization by your team and maximum flexibility with no need for additional technology spending on your part.

Plugging in the latest technologies and delivering them with a clean, modern interface and with the added benefit of donor retention insights, our system is your “go-to” for better fundraising!

#### FROM THE BLOG

> Donor Advised Funds: A Wake Up Call For Fundraisers

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> 7 Productivity Tips That Will Transform Your Fundraising

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> [VIDEO] Get Your Board On Fire About Fundraising

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> Let's Stop Putting Donors Into A Bucket

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#### REACH OUT

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