# **Data Upload - June 25**

[**VIEW RECORDING - 25 mins (No highlights)**](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS)

[@0:00](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=0.0) - **Sharona Reiss Sokolow (otsny.org)**

I'll be right with you. Okay, no problem.

[@0:03](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=3.04) - **Sim Borodach (Hatch)**

Thanks so much.

[@0:35](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=35.5) - **Sharona Reiss Sokolow (otsny.org)**

Thank okay. You

[@2:00](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=120.0) - **Sim Borodach (Hatch)**

Wealth Signals. Wealth Signals. Hey, Sharona. Hi, how are you? Awesome. It's so great to meet you. You guys are, you're doing all the right things over there.

You know, you're just, from the moment that I was clued into your account, you guys are moving at a steady pace.

[@3:10](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=190.62) - **Sharona Reiss Sokolow (otsny.org)**

We're trying.

[@3:12](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=192.32) - **Sim Borodach (Hatch)**

We're trying. Seems like you have a lot of database management experience.

[@3:18](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=198.58) - **Sharona Reiss Sokolow (otsny.org)**

Yeah. I mean, I manage a database, but it's funny because we're going to be converting to Salesforce and Salesforce looks very different than what we have.

So it's like, we got, we had a demo this morning and, but I think until we see our data in there, it's hard to imagine.

**ACTION ITEM: Export donor data from DDC. Prep 2 files - bulk enrichment (no donations) & donations import. Upload bulk enrichment to Hatch. -** [**WATCH**](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=221.9999)

[@3:37](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=217.46) - **Sim Borodach (Hatch)**

Yeah, absolutely. Absolutely. And, and that's, that's the way that data really is. You know, you could talk about it all day long, but until you look at it.

[@3:47](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=227.2) - **Sharona Reiss Sokolow (otsny.org)**

Right.

[@3:48](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=228.12) - **Sim Borodach (Hatch)**

Edge cases, all that.

[@3:50](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=230.88) - **Sharona Reiss Sokolow (otsny.org)**

Right. Exactly.

[@3:51](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=231.94) - **Sim Borodach (Hatch)**

Until we see it. Um, so from what I understand, our goal is to get today your data. Exported or understand like what the steps are to export it and hopefully get uploaded onto Hatch.

And just to clue you in, I just got off a call with another customer who I think is even less savvy than you, and we were able to export and upload their data in about 20 minutes.

[@4:15](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=255.68) - **Sharona Reiss Sokolow (otsny.org)**

Yeah, okay. If we stay focused here, hopefully we can get some progress in. Okay, no problem.

[@4:24](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=264.56) - **Sim Borodach (Hatch)**

So to what extent do you understand what the upload process involves in Hatch? Have you looked at it?

[@4:31](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=271.68) - **Sharona Reiss Sokolow (otsny.org)**

Well, I haven't really looked at it. mean, I set up our account yesterday and I have it on, like I have the main dashboard or whatever that's called.

But I, you know, getting all the information out of DDC, that's what we use now, isn't like, is sometimes a little problematic.

But from what I understand, you don't need all the fields. You only need, like we only need to get our names, address.

Fred. We don't really have reports that get out every piece of information, but from what I understood from Joey, you really only need name, address, and maybe a phone number or an email.

[@5:11](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=311.28) - **Sim Borodach (Hatch)**

We want, okay, so let me tell you, we want first name, last name.

[@5:15](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=315.76) - **Sharona Reiss Sokolow (otsny.org)**

Right.

[@5:16](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=316.54) - **Sim Borodach (Hatch)**

I mean, I'm going to give you the basics and then we can look at the whole, there's a whole list that's sectioned by category.

But yeah, writing it down is great. So first name, last name, ID of that donor.

[@5:28](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=328.82) - **Sharona Reiss Sokolow (otsny.org)**

Right. Okay, right. Right. I forgot that part.

[@5:32](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=332.06) - **Sim Borodach (Hatch)**

Yes. All possible email fields. not just one, but all possible email fields and all possible phone fields. Okay. Full home address, ideally separated into address, address 2, city, state, zip code.

[@5:48](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=348.92) - **Sharona Reiss Sokolow (otsny.org)**

Yeah.

[@5:49](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=349.56) - **Sim Borodach (Hatch)**

Okay. That's what we have. And then there's a slew of other like secondary fields, which include birthday. If you have any.

Social media URLs.

[@6:03](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=363.04) - **Sharona Reiss Sokolow (otsny.org)**

Okay, we don't really have any of that. And don't really have so many birthdays or, or their social media.

No, the, what we have is like address and if they have a summer house or somewhere, a secondary address, a business address, we don't really have that.

I mean, not to say that we shouldn't, but we don't.

[@6:22](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=382.9) - **Sim Borodach (Hatch)**

Sure. No, no worries. We, we really just want the primary address of the person.

[@6:28](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=388.72) - **Sharona Reiss Sokolow (otsny.org)**

Right. So for, for the most part, we have it. There are times that we don't have the address where we just have an email or we just have a phone number and an ID and a first name, last name.

But that's because it's whatever information we get is what we put in.

[@6:43](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=403.84) - **Sim Borodach (Hatch)**

Absolutely. And then there's, like, do you have company names where the person works?

[@6:52](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=412.08) - **Sharona Reiss Sokolow (otsny.org)**

Yeah. So we do have that sometimes also on the account. We have the business address. We don't always have, have the name of the business.

[@7:00](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=420.18) - **Sim Borodach (Hatch)**

But I guess. For the most part, we do. Yeah, we don't want the address, we just want the name.

[@7:04](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=424.1) - **Sharona Reiss Sokolow (otsny.org)**

Okay.

[@7:05](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=425.36) - **Sim Borodach (Hatch)**

And then there's a second, and that's, we've covered everything except for the last section of fields, which is contact person.

So does anyone have like a secondary contact where they'd be like first name, last name, email, phone, like a secretary or an assistant?

It could be a spouse, like if there's a whole spouse entity, but usually we just put the spouse name in the spouse field.

[@7:28](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=448.0) - **Sharona Reiss Sokolow (otsny.org)**

Right, mean normally the spouse is on the main account, so it's first name, spouse name, last name, that's how it comes.

[@7:34](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=454.92) - **Sim Borodach (Hatch)**

There are occasions we have secretary names, but those are usually in the notes of the phone numbers that we have.

Okay, so let's forget about the contact fields. So let's try to do the export now.

[@7:45](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=465.28) - **Sharona Reiss Sokolow (otsny.org)**

Okay, so what is it? So what is it that, so I just have to, like we have export, should I just send over one that, that we exported in the panel?

[@7:59](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=479.46) - **Sim Borodach (Hatch)**

I mean, if it has all those. Fields, yeah, sure.

[@8:02](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=482.34) - **Sharona Reiss Sokolow (otsny.org)**

Just to see, whoops, yeah, I don't know where.

[@8:06](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=486.8) - **Sim Borodach (Hatch)**

Yeah, just to see what's available. You could share your screen, you can open it and share your screen, or you can upload it into your account and then I can download it on my side.

[@8:15](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=495.02) - **Sharona Reiss Sokolow (otsny.org)**

Yeah, okay, so should I share the screen? Because I don't know what I'm doing.

[@8:20](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=500.1) - **Sim Borodach (Hatch)**

Okay, so I'm clicking on share.

[@8:22](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=502.72) - **Sharona Reiss Sokolow (otsny.org)**

And now what do I want to do? I've never shared a screen before.

[@8:25](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=505.86) - **Sim Borodach (Hatch)**

Oh, just hit the green button. If you hover over your Zoom window, you hit the green button that says share.

[@8:32](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=512.16) - **Sharona Reiss Sokolow (otsny.org)**

Yeah, so I did. And now it says share.

[@8:34](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=514.1) - **Sim Borodach (Hatch)**

It's asking me what I want to share. You could share your, I mean, ideally you just share the window with the, with the...

**SCREEN SHARING: Sharona started screen sharing -** [**WATCH**](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=515.732182)

[@8:40](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=520.76) - **Sharona Reiss Sokolow (otsny.org)**

Wait, so do you see... Wait, let me see, because I have too many...

[@8:48](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=528.42) - **Sim Borodach (Hatch)**

You might have something sent, like this is...

[@8:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=535.0) - **Sharona Reiss Sokolow (otsny.org)**

Selecting the whole desktop, you just want to share this... You Oh, these are coming in as DBFs. need to be CSV files, right?

Who else? I don't know.

[@9:11](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=551.46) - **Sim Borodach (Hatch)**

So let's just go to the CRM in that case.

[@9:15](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=555.96) - **Sharona Reiss Sokolow (otsny.org)**

Do you see it? What does that mean, CRM?

[@9:18](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=558.88) - **Sim Borodach (Hatch)**

Wherever the data is stored originally.

[@9:21](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=561.28) - **Sharona Reiss Sokolow (otsny.org)**

Oh, in the database? So here's the database.

[@9:23](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=563.66) - **Sim Borodach (Hatch)**

Yeah.

[@9:24](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=564.7) - **Sharona Reiss Sokolow (otsny.org)**

And I should just run a report, but I'm not sure.

[@9:27](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=567.26) - **Sim Borodach (Hatch)**

Yeah, you can definitely export as a CSV.

[@9:29](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=569.8) - **Sharona Reiss Sokolow (otsny.org)**

Okay, so let me...

[@9:31](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=571.94) - **Sim Borodach (Hatch)**

But are you sure that this has all the fields that we talked about?

[@9:36](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=576.36) - **Sharona Reiss Sokolow (otsny.org)**

For the most part...

[@9:38](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=578.8) - **Sim Borodach (Hatch)**

I'm just saying, before we go through, like, if we can look at it right there in your database, then why, like...

[@9:44](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=584.68) - **Sharona Reiss Sokolow (otsny.org)**

Oh, yeah. Okay, fine. I see what you're saying. So I should just go to... So here's an account that I have.

So his address is here.

[@9:52](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=592.88) - **Sim Borodach (Hatch)**

Do they show you a pre... Do they show you what the exported file will look like?

[@9:59](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=599.68) - **Sharona Reiss Sokolow (otsny.org)**

Um, no, I mean, the only thing... The thing I can show you is like, this is a file that I exported on Friday.

[@10:05](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=605.16) - **Sim Borodach (Hatch)**

Oh, perfect. But we can open it in Excel.

[@10:07](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=607.64) - **Sharona Reiss Sokolow (otsny.org)**

Right.

[@10:08](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=608.46) - **Sim Borodach (Hatch)**

But I can't open it from here.

[@10:10](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=610.04) - **Sharona Reiss Sokolow (otsny.org)**

I have to open it. I don't know if this is, oh, here, this is actually what I exported.

[@10:16](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=616.54) - **Sim Borodach (Hatch)**

Okay. So there's title, first name, last name, city, state, date, donation, campaign, description, type. Right, but this one doesn't have the address.

[@10:28](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=628.3) - **Sharona Reiss Sokolow (otsny.org)**

has phone numbers, but I see it doesn't have, I don't think it has the codes that they, so this is not a good one.

But wait, I can show you a different one that might be gone. I don't want to say that. Okay, I like this one.

Oh, I keep making this mistake. I have to open up them in here.

[@10:54](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=654.04) - **Sim Borodach (Hatch)**

Okay.

[@10:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=655.86) - **Sharona Reiss Sokolow (otsny.org)**

Open. Yeah. So, these are Florida, like I don't know which, okay let's just open this one just to see, so here's the ID in column A, then there's, see what happens is it bunches up all the email addresses together, Do you see what I'm saying?

[@11:33](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=693.48) - **Sim Borodach (Hatch)**

Yeah, are you able to separate them into different columns?

[@11:35](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=695.8) - **Sharona Reiss Sokolow (otsny.org)**

If not, it's okay. No, it puts them all together. mean, not everybody do we have more than one, but yeah, it becomes an issue when I need to separate No worries, it's totally fine as it is.

[@11:48](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=708.8) - **Sim Borodach (Hatch)**

So, that's fine.

[@11:50](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=710.54) - **Sharona Reiss Sokolow (otsny.org)**

This has first name, last name, spouse name, if it's a firm, but I don't think it's like differentiating. It's differentiating.

If it's a firm, if that's what we have listed, that we should be using their business address as opposed to using their home address.

Does that make sense?

[@12:08](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=728.5) - **Sim Borodach (Hatch)**

Yeah.

[@12:10](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=730.26) - **Sharona Reiss Sokolow (otsny.org)**

So, you know, so there will be certain things in these columns, but for the, like...

[@12:16](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=736.6) - **Sim Borodach (Hatch)**

That's fine. Yeah, no, this is, don't worry about it.

[@12:18](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=738.3) - **Sharona Reiss Sokolow (otsny.org)**

That's, that's totally fine. Okay. And then, wait, let me get back up to the top. So, of address, address two, city, state, zip, phone numbers, that's the home number, business number.

[@12:32](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=752.4) - **Sim Borodach (Hatch)**

Perfect. This file looks excellent.

[@12:34](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=754.98) - **Sharona Reiss Sokolow (otsny.org)**

Okay, so this does have a bunch of stuff. mean, there are, I don't know if it's giving the email, the self, it's not giving all the numbers that are on the account.

So this is a report that would run that has basic information.

[@12:49](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=769.52) - **Sim Borodach (Hatch)**

Can you easily add the other phone numbers?

[@12:53](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=773.5) - **Sharona Reiss Sokolow (otsny.org)**

So I, well, I can't, I think I would have to look for another report or even ask them how I get all of the...

We numbers there, because it's picking up three phone numbers. don't know, it says Home 1, Home 2, and then Business, but I don't know for sure that that's what it's doing.

[@13:14](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=794.1) - **Sim Borodach (Hatch)**

Have you ever generated a report by selecting the fields you want yourself?

[@13:19](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=799.78) - **Sharona Reiss Sokolow (otsny.org)**

No, we're using fields that are, you know, reports that are already in there, and then we just delete the fields that we don't need.

[@13:28](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=808.56) - **Sim Borodach (Hatch)**

Can you click on the database again, so we can look at it?

[@13:31](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=811.74) - **Sharona Reiss Sokolow (otsny.org)**

Yeah.

[@13:33](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=813.28) - **Sim Borodach (Hatch)**

So where do you go to, like, export the report?

[@13:36](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=816.08) - **Sharona Reiss Sokolow (otsny.org)**

So I go up here. Can you modify an existing query? Yeah, so that's normally what I do. And, well, like here, well, some of them give DBFs, and some of them are Excel files.

And I don't know what all these things mean. I mean, I've saved them at some point, but we don't normally look.

For all that information, so I guess I would have to start from scratch, really, is create a new one, but again, I don't know, because what would you, you would normally need all that information?

Is what you're saying.

[@14:33](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=873.94) - **Sim Borodach (Hatch)**

Are you sure that there are additional phone fields?

[@14:37](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=877.94) - **Sharona Reiss Sokolow (otsny.org)**

Yeah, because I, on this account, there's, like, he has his home number here, he has a cell phone number, and an email address.

[@14:47](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=887.46) - **Sim Borodach (Hatch)**

Uh-huh. He has an Israeli cell phone number.

[@14:49](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=889.44) - **Sharona Reiss Sokolow (otsny.org)**

Now, I don't know if he was on that report, but there are other...

[@14:56](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=896.22) - **Sim Borodach (Hatch)**

Yep, so that, so I would say, like, you pretty much have what you need to get the file uploaded at this...

this point, and let me just show you where you put it into Hatch.

[@15:06](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=906.52) - **Sharona Reiss Sokolow (otsny.org)**

Okay, so I do have it open, like where I signed up yesterday.

[@15:14](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=914.08) - **Sim Borodach (Hatch)**

so then you're going to hit Upload on the left side.

[@15:16](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=916.38) - **Sharona Reiss Sokolow (otsny.org)**

This orange thing?

[@15:17](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=917.5) - **Sim Borodach (Hatch)**

Upload. Yeah, that works. And then Bulk Enrichment.

**ACTION ITEM: Review Sharona's bulk enrichment file once uploaded. Notify approval for donations import. -** [**WATCH**](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=925.9999)

[@15:23](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=923.86) - **Sharona Reiss Sokolow (otsny.org)**

Bulk Enrichment? Okay, Start Enrichment Process. Okay.

[@15:29](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=929.04) - **Sim Borodach (Hatch)**

Scroll down, please.

[@15:30](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=930.88) - **Sharona Reiss Sokolow (otsny.org)**

And then you're going to select a file.

[@15:32](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=932.8) - **Sim Borodach (Hatch)**

And you'll follow the steps from here. They're really straightforward. And even once you submit the file, I'm going to review it, okay?

I'm going to review the file that you submit. So do as best you can. But like certain things like the emails, I'll just take care of.

And once you submit it here, I'll get notified.

[@15:52](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=952.02) - **Sharona Reiss Sokolow (otsny.org)**

So you don't need to let me know.

[@15:53](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=953.26) - **Sim Borodach (Hatch)**

You can just email if you have any questions. But even better than emailing me, there's a blue button in the bottom right corner.

in here. here's Let me You see that little chat icon?

[@16:01](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=961.82) - **Sharona Reiss Sokolow (otsny.org)**

Yeah. Yeah.

[@16:03](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=963.28) - **Sim Borodach (Hatch)**

If you hit that, you can chat with me and I'll answer. Oh, okay. And that's you who I'm chatting with?

Okay. Exactly. And then if you hit the upload button again, you can see there's the upload button on the left side of the page.

[@16:18](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=978.36) - **Sharona Reiss Sokolow (otsny.org)**

Wait, how do I...

[@16:19](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=979.3) - **Sim Borodach (Hatch)**

One second. You don't have to... Well, you hit those little two arrows that are pointing in opposite diagonal directions.

[@16:24](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=984.08) - **Sharona Reiss Sokolow (otsny.org)**

Yeah. Oops. Wait, no. Wait, Wait, no. Did I get out of it?

[@16:34](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=994.0) - **Sim Borodach (Hatch)**

Do you still see No, I'm still seeing your window.

[@16:36](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=996.0) - **Sharona Reiss Sokolow (otsny.org)**

Yeah. Okay. So how do I get back into there?

[@16:43](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1003.32) - **Sim Borodach (Hatch)**

I think you're here.

[@16:44](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1004.92) - **Sharona Reiss Sokolow (otsny.org)**

Oh, okay. Now, I see.

[@16:46](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1006.38) - **Sim Borodach (Hatch)**

Now this...

[@16:47](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1007.74) - **Sharona Reiss Sokolow (otsny.org)**

How do I get rid of this?

[@16:49](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1009.06) - **Sim Borodach (Hatch)**

Oh, sorry. Hit the blue icon in the bottom right corner again.

[@16:51](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1011.92) - **Sharona Reiss Sokolow (otsny.org)**

Oh, okay.

[@16:52](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1012.64) - **Sim Borodach (Hatch)**

Fine. I got it. And then select upload over on the left side.

[@16:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1015.38) - **Sharona Reiss Sokolow (otsny.org)**

Oh, Up below over here.

[@16:57](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1017.62) - **Sim Borodach (Hatch)**

And then you're going to choose donations import.

[@16:59](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1019.92) - **Sharona Reiss Sokolow (otsny.org)**

forward. Okay.

[@17:02](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1022.3) - **Sim Borodach (Hatch)**

And just follow the instructions here to figure out how to get your donations data in and out. Starting with preparing your data with the little robot icon, you just have to read this, and if you scroll a little bit further, you'll see there's a page that explains to you best practices, which are really straightforward, it's not complicated.

You can also download a sample file, and you're going to upload this one after you do the bulk enrichment file, okay?

But wait for me to actually upload your donations, wait for me to notify you, go ahead. Okay, so wait, these are two different, wait, I'm going back.

Yeah.

[@17:42](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1062.48) - **Sharona Reiss Sokolow (otsny.org)**

So first, so these are two different files?

[@17:45](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1065.38) - **Sim Borodach (Hatch)**

Exactly.

[@17:46](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1066.86) - **Sharona Reiss Sokolow (otsny.org)**

Okay. some of the files, so you're saying the one that's in here in bulk enrichment does, should not have any donation information.

[@17:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1075.5) - **Sim Borodach (Hatch)**

Correct.

[@17:56](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1076.78) - **Sharona Reiss Sokolow (otsny.org)**

Okay. And then the one in this one. Yeah. We'll then have donation information.

[@18:02](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1082.5) - **Sim Borodach (Hatch)**

You got it.

[@18:03](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1083.98) - **Sharona Reiss Sokolow (otsny.org)**

Okay. But it can be the same, like, export, I just shouldn't, for the first one, I don't need to use the columns that have money in it, is that it?

Exactly.

[@18:13](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1093.06) - **Sim Borodach (Hatch)**

Okay. Let's try and figure out, I mean, I didn't realize that maybe I should have figured out how to do that before we did our Zoom.

No worries. Oh, it's totally fine. It's really straightforward, and again, if you have any questions that come up, you can just message me in the, by hitting the blue icon at the bottom of my corner, trust me, we don't need to even meet again to get you through the bulk enrichment.

Like, nobody, you know, needs extra Zoom meetings, but we can if you feel stuck and you, like, want to get back together.

Ideally, from my perspective, you export the data from the database, you do the bulk enrichment, I review it, I approve it, I let you know that it's been approved, and then you upload the donations file.

Just be sure to follow the instructions, like, read through the instructions in the donation support. They're really easy. care.

is Like, could take you 10 minutes to understand what's in there.

[@19:03](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1143.56) - **Sharona Reiss Sokolow (otsny.org)**

Okay, so on this, I can print out now this download, the sample file, that's for the original, and the other.

[@19:18](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1158.7) - **Sim Borodach (Hatch)**

Yeah, there's also a sample file to use for the other.

[@19:21](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1161.28) - **Sharona Reiss Sokolow (otsny.org)**

For the donation reports, I can save that too.

[@19:24](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1164.14) - **Sim Borodach (Hatch)**

Yep.

[@19:25](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1165.42) - **Sharona Reiss Sokolow (otsny.org)**

Because I'm guessing the names of the fields should be different.

[@19:29](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1169.92) - **Sim Borodach (Hatch)**

Yep. Yep. Sorry?

[@19:34](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1174.64) - **Sharona Reiss Sokolow (otsny.org)**

No, because you saw what our headings were.

[@19:36](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1176.58) - **Sim Borodach (Hatch)**

So I just have to make sure that our headings match the headings that you want. Yeah, you don't have to do that.

Because when you upload the files, you're going to have a map, there's going to be an opportunity to match.

Like you might call it mobile phone, and we call it, sorry, you might call it cell phone, and we call it mobile phone.

Right. you'll match them. And we use AI to do the matching by default, but it is preferable to have them, you know,

And correctly named going in, because it's a better chance it works, you know, but you don't really need to do that.

[@20:06](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1206.92) - **Sharona Reiss Sokolow (otsny.org)**

Okay, now, am I supposed to be trying to do all of our data that we have, or just, or?

[@20:13](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1213.46) - **Sim Borodach (Hatch)**

How many donors do you have?

[@20:14](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1214.92) - **Sharona Reiss Sokolow (otsny.org)**

Do you have any idea? Well, no, so we have, because not everybody in there is donors, some of them are vendors, so really just using the donors, I think probably about 8,000.

We have 15,000 of something, but I think that that includes, like, our vendors and other stuff that we don't, that aren't giving us money.

It's only the ones that are potential donors that I should be doing.

[@20:39](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1239.74) - **Sim Borodach (Hatch)**

Yeah, you don't really want to include vendors.

[@20:42](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1242.06) - **Sharona Reiss Sokolow (otsny.org)**

Okay.

[@20:43](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1243.04) - **Sim Borodach (Hatch)**

Like someone who's not relevant as a donor.

**ACTION ITEM: Consult Joey re donor inclusion criteria (e.g. last 5 yrs). Finalize donor list for Hatch import. -** [**WATCH**](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1243.9999)

[@20:45](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1245.94) - **Sharona Reiss Sokolow (otsny.org)**

Right, right, okay. And does it matter, like, and how far back should I be going?

[@20:54](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1254.94) - **Sim Borodach (Hatch)**

I would ask, like, well.

[@20:57](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1257.68) - **Sharona Reiss Sokolow (otsny.org)**

Like, what do I, oh, I guess I should ask, on my side I should ask. That's Joey who works with me as opposed to the Joey that works with you.

[@21:04](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1264.04) - **Sim Borodach (Hatch)**

Yeah, probably. I mean, you don't really do the fundraising part, right?

[@21:08](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1268.12) - **Sharona Reiss Sokolow (otsny.org)**

No. I mean, I enter in fundraising information and I run reports, but I'm not the one that does fundraising.

[@21:14](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1274.44) - **Sim Borodach (Hatch)**

Kind of for you guys to, like, figure out what makes the most sense to you. Okay. You could go as far back as, like, I mean, anyone who's given in the last five years, right?

Yeah, probably makes most sense, yeah. Yeah, you'll obviously want to include all of their historical giving, right, from the beginning of time, but you may just pick donors from the last five years, but you might, I don't know.

You just talk with Joey and decide.

[@21:39](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1299.36) - **Sharona Reiss Sokolow (otsny.org)**

Okay. All right. So I'll do that. And so first I upload the information without the money, and then the second one is, it's going to have the same information and the money.

[@21:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1315.08) - **Sim Borodach (Hatch)**

Is that correct? You only, you'll see when you go to look at those.

[@21:59](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1319.48) - **Sharona Reiss Sokolow (otsny.org)**

Oh, the sample.

[@22:00](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1320.62) - **Sim Borodach (Hatch)**

Okay. I'll print it out. Yeah, it's just, it's going to be ID, donation amount, donation date, and then there's a few optional fields like campaign name, solicitor, kind of thing.

So you don't need the first name of the donor, the last name of the donor, the emails, phones, because it's going to map with the ID, and you really just need donation details.

[@22:20](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1340.98) - **Sharona Reiss Sokolow (otsny.org)**

Okay, fine. Okay, so I'm going to try and get that information out. our system so that we can get it in, because that, yeah, that'll be.

Okay, and I just have to save this dashboard to my favorites or whatever, and then I can get back to it.

[@22:45](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1365.16) - **Sim Borodach (Hatch)**

Is that correct?

[@22:46](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1366.16) - **Sharona Reiss Sokolow (otsny.org)**

Yeah, yeah. Or you just type in dashboard and it will probably, you start typing dashboard. okay, because that's what I find the hardest.

I can't find where my favorites don't seem to pop up. Okay. Okay. Okay. So for right now, that's all, that's all I need.

Like, getting it out, getting it back, I'm not going to worry about that because first I need to get it to you to begin with.

[@23:11](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1391.36) - **Sim Borodach (Hatch)**

Yeah. And I mean, in reality, like, this shouldn't take so long. I mean, if you could get this done by the end of the week, like that would be, you know, because we love when customers move quickly through onboarding because then we actually get to using the product.

This is just the setup part. So doing it intentionally is important.

[@23:32](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1412.52) - **Sharona Reiss Sokolow (otsny.org)**

Like, not rushing is key.

[@23:33](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1413.96) - **Sim Borodach (Hatch)**

Yeah, yeah, But also just moving it along because then, like, we get into this game where I'm calling you and I'm like, hey, can you please upload your data because I'm not doing my job if I don't care.

But it's like not really the fun part of my job. It's really working with the fundraisers. So, yeah.

[@23:51](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1431.9) - **Sharona Reiss Sokolow (otsny.org)**

Okay, no, I will work on that either today or definitely tomorrow.

[@23:55](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1435.7) - **Sim Borodach (Hatch)**

Awesome.

[@23:56](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1436.44) - **Sharona Reiss Sokolow (otsny.org)**

Of getting, yeah, no, because I don't want to waste the time either. Lord.

[@24:00](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1440.66) - **Sim Borodach (Hatch)**

Yeah, exactly. Well, thank you so much, Sharona, for making the time to meet with me.

[@24:05](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1445.58) - **Sharona Reiss Sokolow (otsny.org)**

Okay, my pleasure. And if I have any questions, if I'm not on here, I could just send you an email to the email that you sent to me.

Even better is to message through that in-app chat message. If you email, it's totally fine. Okay, no problem. Thank you, and nice meet you.

[@24:24](https://fathom.video/share/v45VotdzgbzikLHr6-Cyr59X6XBjkmBS?timestamp=1464.84) - **Sim Borodach (Hatch)**

You too, have a great Shabbat Shalom. Thank you, you too. Thanks. Bye. you.