# Importing – Importing Donations

| Speech | Cursor Actions |
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| Note that only certain users are allowed to import data into a Sumac database. If you are going to import data, your Sumac administrator must give you the Bulk Edit & Import capability in your user profile. | picture of a user record and highlight the Bulk Edit & Import capability |
| You may have donation data in different places – spreadsheets, or perhaps other databases. You want to gather it all together in your Sumac database. | picture of various spreadsheets, perhaps with person in the middle |
| Perhaps you just held an event. At that event, attendees made donations, which you recorded in a spreadsheet and after the event, you want to import those donations into your Sumac database. | Show console. |
| Before importing your spreadsheet, you should clean up the data. Use Sumac's Import Workspace to do this. | Expand Utilities. Point to Import Workspace |
| Click Import Workspace. Select the file and click OK. | Import Workspace. choose file, click OK. |
| First, specify the number of header rows in your spreadsheet, so that Sumac does not mistake column headers for actual data. This spreadsheet has one header row. In the file management area, under header rows, select 1. Notice that Sumac greyed out the header row to indicate that this row holds column titles. | Choose Header Rows: 1 Point to header row to show grey. |
| The donor contact is a mandatory field in donation records, so you *must* have a donor contact for each donation. You need to use data in the incoming file to identify the donor. If the donor is not already in the Sumac database, then you need to add them. | |
| You can do this by selecting columns that hold contact data. In this spreadsheet, the contact first and last name columns hold the contact information, so select those two columns, then click Get Contact IDs. | Select first and last name columns. Click Get Contact IDs. |
| Sumac asks you to identify what information is in the two selected columns. In this example, it is the donors' first and last names, but note that you could use many other contact fields to identify these contacts, for example their street address, birth date, or email address. | Choose First and Last Name |
| Click OK, and Sumac looks in the database to find contacts with the specified first and last names, then creates a new column to hold the contact IDs for the donors that are already in your database. Records that have problems are selected. Click to show only selected records. | Click OK. Point to new contact ID column. |
| There are two possible problems: either the contact is not in the database, in which case there will be no contact ID. Alternatively, the columns being used to identify the contacts – in this example, the first and last names – do not uniquely identify a contact and there are two or more contact IDs showing. | [make sure there is at least one example of both types of problem] |

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| First, let's deal with contacts that are not in the database. If there are many of them, you could save this file and import new contacts into the database. Since there is only one, we can quickly add them to the database and enter their IDs in the file. | |
| | Enter new contact, note their IDs, put IDs in the Import Workspace window |
| Ambiguously defined contacts can only be resolved if you know which of two contact IDs to use. Let's say that we know which of the two James Smiths in our database actually made the donation, so we can delete the incorrect ID. | |
| Show all rows and we now have a single donor contact ID for every donation. Just to be doubly sure, it is a good idea to click the contact ID column and validate them. | select Contact ID column, choose Validate/Contact IDs |
| Continue validating other columns, like currency amount and date fields, to ensure that all the data in this spreadsheet is valid. That reduces the chance of errors when importing these donations. | Validate date and currency amounts |
| Although the spreadsheet contained only one column for the amount, Sumac donation records contain fields for both a total amount and a receiptable amount. Often these are the same amounts, so click to select the amount column, and duplicate it. | Select amount column, duplicate it. Name the columns "Total Amount" and "Receiptable Amount" |
| Save the work you've done in Import Workspace. Notice that Sumac proposes a revised file name. Each time Import Workspace saves a file, it increments the file version number. | Click Save As, and save file. |
| Now that you've imported the new contacts and cleaned your spreadsheet, click Utilities, Import, and Import. | Click Import. |
| Indicate that you are importing donations. | Choose Donations. |
| Choose the data file, | Choose data file. |
| and click OK. | Click OK. |
| The data appears on the right hand side. You must tell Sumac which donation fields correspond to which column of data. | Point to Data File. |
| First, identify the contacts in the incoming donation records. Contact names may be ambiguous, but you used Import Workspace to find contact IDs for all the donors, so you can identify the contacts using their IDs. | Point to first and last name columns. Point to ID column |
| Select the ID column, and specify that this column contains the donors' contact ID. | Select ID column. Choose Donor contact ID |
| The left hand side of the window holds a list of all the fields in donation records. | Point to Fields Available. |
| Match field names to data columns by dragging field names and dropping them onto the data columns. | Drag and drop Field name into columns. |

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| Some donation information may not actually be in the file. For example, you know that these donations came from a particular event, but the event is not in a column in the file. You can specify the event by clicking beside the Event field on the left hand side, then choosing the event. This specifies the event that will be used in every donation being imported. | [show this being done for each column; do not fast forward through this process] |
| Once all the donation columns have been matched, you must check the data before you can import it. | |
| Click "Check Before Import" to tell Sumac to check all the data. Sumac checks every row in every column to make sure that the data is correct. | Click Check Before Import. Click OK. |
| If something is wrong, perhaps a date or amount that is incorrectly formatted, then Sumac highlights the incorrect cell and puts an error message at the start of the row. | Highlight data in the first row. Highlight "contains error." |
| At this point, you may choose to stop the import, fix up the original file, and try again. Before you do this, you should Save Column Choices to save the list of column selections; | |
| later when you import again, you can save some time by clicking Load Column Choices. | Highlight Load Column Choices button. |
| Alternatively, if there appears to be something wrong with an entire column, you can click to select the column, then click Clear Column Title to tell Sumac to not import that column. | Highlight Clear Column Title button. |
| Alternatively, you can click to just ignore this single row of data in the incoming file. | Click to exclude the bad first row. |
| Then click Import. | Click Import. |
| All the donation records are imported into Sumac. They turn from black to green to indicate successful importing. | Click OK. |
| If you now look at the donations list, and search for donations from your event, you see that the newly imported donations have been added to your database. | Close window. Click Donations. Search by Event. Choose the event, click Search. Show the newly imported donations. |
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