


# **Welcome to Bloomerang Academy**

Thank you for joining us!

Please drop into the chat and tell us where you are joining us from  
and what the weather is like where you are!



# Housekeeping

**Live Transcript**

We all know what we want to do is spend  
administration and more time Doing the w

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Chat



Raise Hand



Q&A



Live Transcript

**Share ideas**

**Ask questions**

# Housekeeping

Dial in audio access: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to [support@bloomerang.com](mailto:support@bloomerang.com). Our support team is amazing!

# Poll



# Megan Collins

Data Migration Associate

Megan has been with Bloomerang for 4 years and spent the first half of that time in the Customer Support Department. She now works in the Implementations Department as a Data Migration Associate. Before joining Bloomerang, Megan gained customer service, administrative, and event management skills in the hospitality industry through various roles at world-class hotels and theme parks.



# Import Basics



# Topics We'll Cover Today

1. Why would you run an import?
2. Imports: the CAN and CANNOTs
3. Prepare your file
  - a. Templates
  - b. Editing existing files
4. How to conduct the import
5. Demo some imports in Bloomerang

# Why would you run an import?

- Add new constituents in bulk
- Efficiently update data on existing constituents
- Mass create transactions from a processor or collection
- Log event attendance via an interaction import
- Transfer data from another system to Bloomerang
- And more!



## An import CAN

- Create individual and organization constituents
- Add constituent contact info
- Update existing constituents & constituent custom fields/groups
- Create new donations, interactions, notes

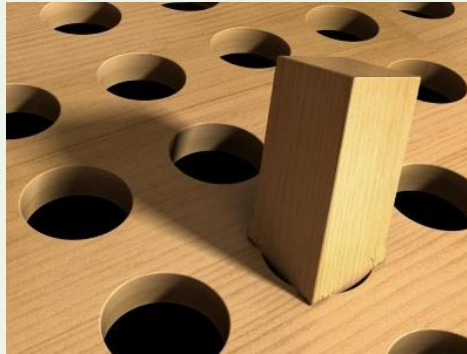


## An import CANNOT

- Create relationships or households
- Update specific contact info (ex. if you have an incomplete address already on the constituent's account, an import will only add a new address, not update the existing)
- Update existing donations, interactions, notes
- Create pledges, recurring donations, soft credits
- Mass delete data (however, we do have a Mass Delete tool!)

## Common Misconception:

**“I can just take a file from another source and import it straight into Bloomerang as-is!”**



**FALSE.**

**You need to manipulate your data so it will fit into Bloomerang.  
This is true of ANY import for ANY software.**

**The amount of time it takes to do this entirely depends on the state of your data.**

Large, vibrant green Monstera leaves with characteristic holes, positioned in the top-left corner of the slide.

# Preparing Your Data

A very faint, light-colored background image of a person sitting at a desk, possibly working on a laptop, located in the lower right quadrant of the slide.

## Option 1: Paste data into Bloomerang's provided import templates

### Pros:

- All required fields are already present
- Column headers already match Bloomerang field names

### Cons:

- Lots of copying and pasting/manual entry increases probability of human error
- You have to add in custom fields

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## Option 2: Edit an existing file

### Pros:

- Less chance of data being misplaced or left out because everything's already there
- Depending on the format of the file, you may just need to make a few simple edits

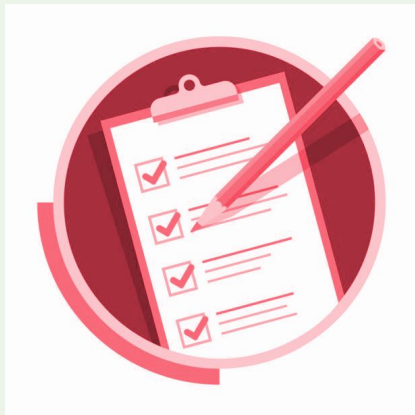
### Cons:

- Higher probability of mis-mapping, leading to data being imported to the wrong fields
- Depending on the format of the file, you may need to make a LOT of edits



# File Setup

# General Guidelines



## Recommendations

- Column headers should match available **field names** in Bloomerang. Use [this guide](#) for reference.
- Remove any **unnecessary columns** from your file.

## Requirements

- **Individuals & Organizations** must be in separate files\*
- Values for many fields (custom fields, Fund, Campaign, Appeal, etc.) must match **already-existing values** in the database.
- No **blank rows** in the file.
- The file must be saved as a **.csv**
- File **size limit** is 10,000 rows or 2MB.

\*If you have all constituents' **Bloomerang account numbers** in the file, you can import Individuals and Organizations **together**.

# Check for Required Fields



## **Constituent**

Individual: First Name + Last Name

Organization: Organization Name

## **Donation**

Date, Amount, Fund

## **Interaction**

Date, Subject, Purpose, Channel

## **Note**

Date, Note

Date must be in MM/DD/YY or MM/DD/YYYY format



# Ensure you have enough data points for DUPLICATE MATCHING

## Individuals

First Name + Last Name

## Organizations

Organization Name



**At least 1 of the  
following:**

Email Address  
Phone Number  
Mailing Address

**TIP:** If you have constituents' **Bloomerang account numbers** in the file, you don't need the name and contact information. Account numbers ensure an **exact match**.

# Ensure all data is inline

**Incorrect**



	A	B	C	D	E
1					
2					
3		<b>John Doe</b>	<b>123 A St, Any Town IN 46000</b>	<b>johndoe@test@bloomerang.com</b>	<b>317-111-1111</b>
4			12/31/23	\$75	General/Operating
5			12/25/23	\$80	Building Fund
6			12/26/23	\$100	General/Operating
7			12/28/23	\$80	General/Operating
8			12/30/23	\$100	Building Fund
9			12/29/23	\$75	General/Operating
10			12/31/23	\$80	Building Fund
11		<b>James Smith</b>	<b>654 Main St, Any Town IN 46000</b>	<b>jamessmith@test@bloomerang.com</b>	<b>317-222-2222</b>
12			12/26/23	\$100	Building Fund
13			12/28/23	\$80	General/Operating
14			12/30/23	\$100	General/Operating

**Correct**



	A	B	C	D	E	F	G	H	I	J	K
1	<b>First Name</b>	<b>Last Name</b>	<b>Home Street</b>	<b>Home City</b>	<b>Home State</b>	<b>Home Zip</b>	<b>Home Email</b>	<b>Home Phone</b>	<b>Date</b>	<b>Amount</b>	<b>Fund</b>
2	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/31/23	\$75	General/Operating
3	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/25/23	\$80	Building Fund
4	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/26/23	\$100	General/Operating
5	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/28/23	\$80	General/Operating
6	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/30/23	\$100	Building Fund
7	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/29/23	\$75	General/Operating
8	John	Doe	123 A St.	Any Town	IN	46000	johndoe@test@bloomerang.com	317-111-1111	12/31/23	\$80	Building Fund
9	James	Smith	654 Main St.	Any Town	IN	46000	jamessmith@test@bloomerang.com	317-222-2222	12/26/23	\$100	Building Fund
10	James	Smith	654 Main St.	Any Town	IN	46000	jamessmith@test@bloomerang.com	317-222-2222	12/28/23	\$80	General/Operating
11	James	Smith	654 Main St.	Any Town	IN	46000	jamessmith@test@bloomerang.com	317-222-2222	12/30/23	\$100	General/Operating

# Separate Names and Addresses into the correct fields

 **Incorrect**

	A	B
1	<b>Name</b>	<b>Address</b>
2	John Doe	123 A St. Any Town, IN 4600
3	James Smith	654 Main St. Any Town, IN 46000

**Correct** 

	A	B	C	D	E	F
1	<b>First Name</b>	<b>Last Name</b>	<b>Home Street</b>	<b>Home City</b>	<b>Home State</b>	<b>Home Zip</b>
2	John	Doe	123 A St.	Any Town	IN	46000
3	James	Smith	654 Main St.	Any Town	IN	46000

# Only one data point per cell\*

**Incorrect**



	A	B	C
1	<b>First Name</b>	<b>Last Name</b>	<b>Email</b>
2	John	Doe	johndoe+test@bloomerang.com, johndoework+test@bloomerang.com

	A	B	C	D
1	<b>First Name</b>	<b>Last Name</b>	<b>Home Email</b>	<b>Work Email</b>
2	John	Doe	johndoe+test@bloomerang.com	johndoework+test@bloomerang.com

**OR**

**Correct**



	A	B	C
1	<b>First Name</b>	<b>Last Name</b>	<b>Work Email</b>
2	John	Doe	johndoe+test@bloomerang.com
3	John	Doe	johndoework+test@bloomerang.com

# \*Except for Pick Multiple custom fields

You can use the pipe character ( | ) to separate values

	A	B	C	D
1	<b>First Name</b>	<b>Last Name</b>	<b>Work Email</b>	<b>Volunteer Interests</b>
2	John	Doe	johndoework+test@bloomerang.com	Cleaning   Data Entry   Events

However, the “one data point per cell” rule is still acceptable; using a pipe is a shortcut.

	A	B	C	D
1	<b>First Name</b>	<b>Last Name</b>	<b>Work Email</b>	<b>Volunteer Interests</b>
2	John	Doe	johndoework+test@bloomerang.com	Cleaning
3	John	Doe	johndoework+test@bloomerang.com	Data Entry
4	John	Doe	johndoework+test@bloomerang.com	Events

# Spreadsheet tips!



- Use the [Split Text to Columns](#) command to easily split Full Name columns to First Name and Last Name
- Add an apostrophe ( ' ) in front of a 0 to retain the leading zero in a Zip Code



# Importing Your Data

# Hold Your Horses!



- Import a test/sample of up to 5 constituents in your file before importing a big file.
- After importing a test, spot check constituents and make adjustments as needed.
- **Take your time.** Remember that imports are irreversible. A lucky few can be rectified quickly, but the vast majority of the time, **paid data services** or **hours of manual work** are needed to fix imports gone wrong.

**TIP:** Email your file to Support for testing! They will help ensure that everything will be imported as expected, and give you instructions on how to update or fix your file if applicable.



# The Import Workflow

For more details, please see [Import Data into Bloomerang](#).

To import data into Bloomerang:

1. Click **Data Tools --> Import**.
2. Click **New** to create a new import template.
  - a. For best results, avoid using **templates** created from past imports unless the new file has IDENTICAL column headers.
3. **Type in a name** (for example, New Constituent Import).
4. **Choose the type of import:** Constituents, Donations, Interactions or Notes.
5. Choose **Individual** or **Organization**.
6. Click **Select a File**. Browse and select the import file from your computer (CSV format).



# IMPORTANT!



How do you want us to bring in your data?

### Constituent Fields

First Name	= [First Name]	
Last Name	= [Last Name]	
Account Number	= [Account Number]	×
Name Title	= [Title]	×
Name Suffix	= [Suffix]	×
Middle Name	= [Middle Name]	×
Home Address	= [Address Line 1]	×
Home City	= [City]	×
Home State	= [State/Province]	×
Home ZIP Code	= [Postal Code]	×
Home Country	= [Country]	×
Home Email	= [Email Address 1]	×
Home Phone Number	= [Phone - Work Phone]	×
Work Phone Number	= [Phone - Work Phone]	×
Mobile Phone Number	= [Phone - Mobile]	×
Interests	= [Volunteer Interests]	×
+ Add Another Field		

## Step 7: Map your data.

The fields on the left are the field names in Bloomerang, while the fields on the right are the column headers from your file.

Check that:

- a. All fields from your file are being mapped.
- b. The columns are being mapped to the CORRECT fields in Bloomerang.

Bloomerang will automatically suggest fields to map to based on your column headers, as shown. DO NOT simply assume they're correct. Check EACH AND EVERY ONE and make corrections if necessary.

# Final Steps

Step 6/6 Prev Run

## Verify Your Information

1 New Constituent will be added

**We will skip the following 2 lines**

**Line 2**  
'Cleaning; Data Entry; Events' is not a valid value for the field 'Interests'.

**Line 3**  
'Graphic Design; Events' is not a valid value for the field 'Interests'.

8. Verify your information.
  - a. Check for [import errors](#).
  - b. Choose how to handle errors, if any. Take action to correct any errors.
9. Click Run.



# Questions?

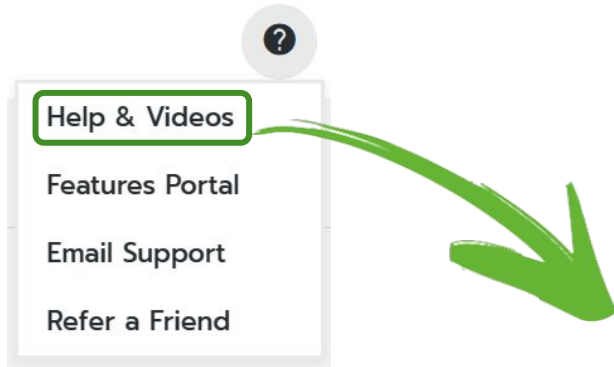


**Let's try it out!**

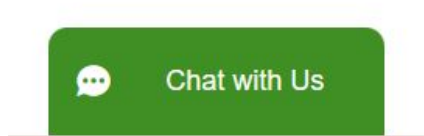


# Resources

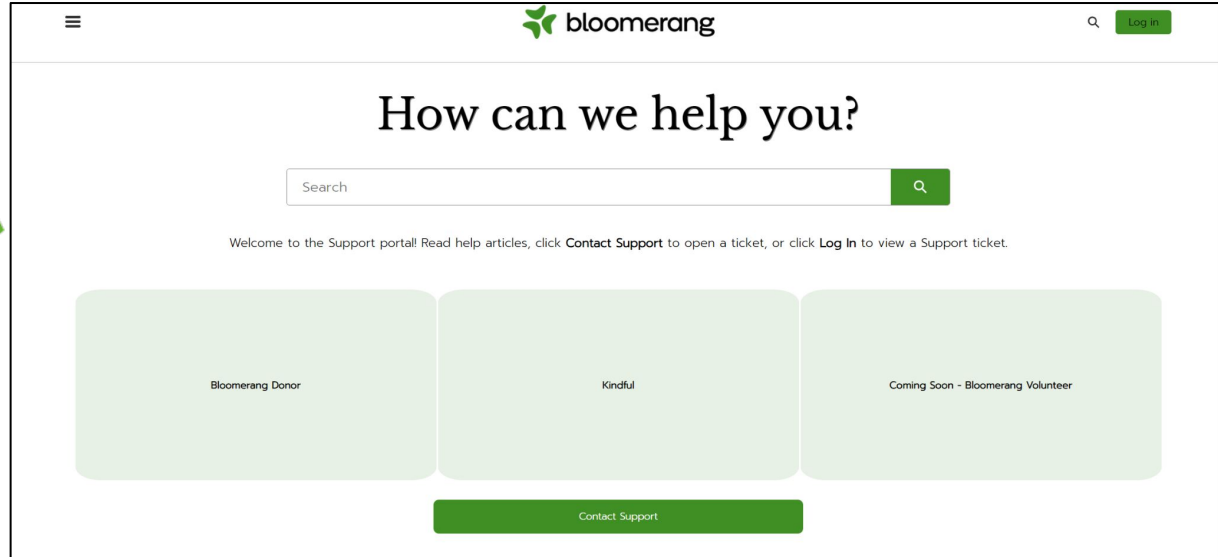
## Bloomerang Knowledgebase and Support Contact



- Help & Videos
- Features Portal
- Email Support
- Refer a Friend



Chat with Us



bloomerang

# How can we help you?

Search

Welcome to the Support portal! Read help articles, click **Contact Support** to open a ticket, or click **Log In** to view a Support ticket.

Bloomerang Donor Kindful Coming Soon - Bloomerang Volunteer

Contact Support

# Resources

## Knowledgebase

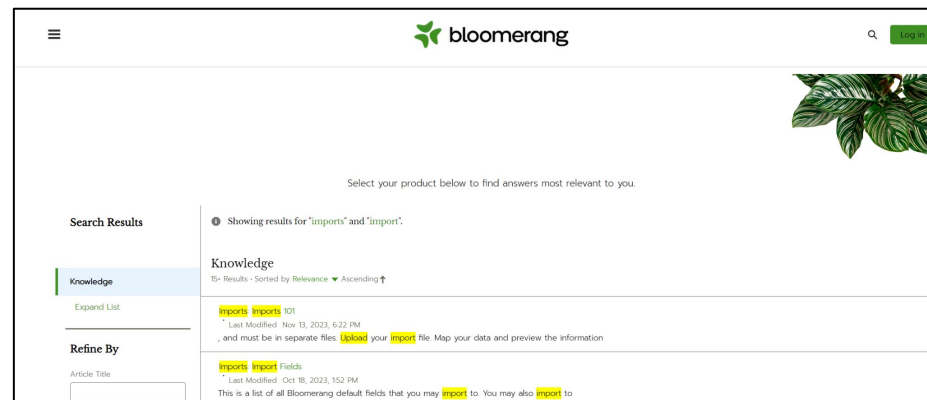
[Imports: Import Fields](#)

[Imports: Set Up Import Files](#)

[Imports: Import Data into Bloomerang](#)

[Imports: Import Errors](#)

[Bulk Delete Constituents](#)



The screenshot shows the Bloomerang Knowledgebase search results page. The header includes the Bloomerang logo and a 'Login' button. The main content area displays search results for the query 'imports' and 'import'. The results are sorted by relevance in ascending order. Two knowledge articles are shown:


- Article 1:** Titled 'imports imports 101', last modified on Nov 13, 2023, at 6:22 PM. The content states that imports must be in separate files and provides instructions to upload an import file to map data and preview information.
- Article 2:** Titled 'imports import Fields', last modified on Oct 18, 2023, at 1:52 PM. The content states that this is a list of all Bloomerang default fields that may be imported.

The left sidebar contains a 'Search Results' section with a 'Knowledge' filter selected, an 'Expand List' button, and a 'Refine By' section with an 'Article Title' search box.

Large, vibrant green monstera leaves with characteristic holes, positioned on the left side of the slide.

**Thank you for attending!**

Visit our website to see more upcoming  
Bloomerang Academy webinars!

A smaller portion of a monstera leaf, located in the bottom right corner of the slide.