

IMPORT-O-MATIC™

THE FLEXIBLE IMPORT SOLUTION FOR THE RAISER'S EDGE®

- ➔ Import data from banks, lockboxes, mail houses, prospect lists, web sites, and patient or alumni databases efficiently and accurately
- ➔ Process constituent, address, gift, relationship, volunteer, tribute, and event records **simultaneously**
- ➔ On-the-fly **duplicate checking** allows user to select from a list of possible matches or auto pick an exact match
- ➔ Create **unlimited custom templates** to import from nearly any file layout
- ➔ Import **event participants** & **honor/memorial tribute** gifts
- ➔ Optionally import gifts directly into **gift batches**
- ➔ Set default values for nearly any constituent, gift, or participant field
- ➔ **Merge/change** duplicate records on the fly
- ➔ Add or update addresses, as appropriate, **with the click of a button**
- ➔ Match constituents on **alias or email addresses** as well as biographical and address data
- ➔ Automatically proper case biographical information
- ➔ Automatic **data clean up and standardization**
- ➔ Create static result queries for all records modified or added
- ➔ Automatically create or import constituent **action records**
- ➔ Import time sheets and job assignments for **volunteer records**
- ➔ Add or update individual, organization, and educational relationships



“ Import-O-Matic has increased our gift processing productivity on small gift campaigns by 82% while eliminating some of the human error. ”

— Bill Florio, Teach for America

Address Processing

Duplicate Search Matching Results

Constit ID	First	Last	Spou.	Spou.	Address	City	State	Zip	Email
124456789	Kathy	Bowen			324 Dickerson Lane	Kennedy	MN	56733	KBowen@comcastic.net
28532	Robert	Bowen	James	Bowen	324 Dickerson Lane	Kennedy	MN	56733	KBowen@comcastic.net
255	Kate	Bowen			5639 Rosedown Ln	Kennedy	MN	56733	

Duplicate Criteria: Last Name - 20, First Name - 1, ZIP - 4, Email Address

Profile Screen

Field #	Field Name	Record Type	Value Type	#
1	EventID	Participant	Event ID	
2	ConstitID	Constituent Field	ID	
3	FirstName	Constituent Field	First Name	
4	LastName	Constituent Field	Last Name	
5	Address	Constituent Address Field	Address	
6	City	Constituent Address Field	City	
7	State	Constituent Address Field	State	
8	Zip	Constituent Address Field	ZIP	
9	Participation	Participant	Participation	
10	Status	Participant	Status	
11	InvitedDate	Participant	Invite Date	
12	Response	Participant	Response	
13	ResponseDate	Participant	Response Date	
14	Registration	Participant	Registration Date	
15	RegistrationDate	Participant	Registration Date	
16	SeatingGroup	Participant	Group	
17	PrintCards	Participant	Print Cards	
18	PrintCards	Participant	Print Cards	

Matching Results

For more information or to schedule a demo, please contact us
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