

How To Import Fundraisers and donations

1. Import Fundraisers

Many third part fundraising platforms will have the ability to track Fundraisers. This is particularly true for Peer-to-Peer fundraising platforms where the Fundraiser might organise an event, but may/may not provide an actual donation.

When using Payments2Us with the Nonprofit Success Pack, the fundraiser will get the Soft Credit for all donations that were linked with them. For example, if a fundraiser did a cycling event around the country and organised for a number of people to sponsor them, then they would get a Soft Credit for all of the donations raised, but the individual donors would get hard credited for their own individual donations

In order to soft credit donations to a Fundraiser, the Fundraiser must first exist in the system. Use this process to import the fundraisers (without any donations), then use a second import to import the donations and link those donations with the fundraiser.

1.1. Import Files - Contact (Fundraiser) Upload

On the Import Files Tab, Press New:

- Make sure you select Contact Load Only (This way, it will not create any opportunities, will only create the Contacts)
- Select a CSV file. The CSV file should include a minimum of first name, last name, fundraiser id. Note, the more information that you are able to bring in, the more criteria Payments2Us can de-duplicate on.

Press "Next" button

1.2. Match Columns

Match the columns in your CSV file with the data in Salesforce.

As a minimum, match first name, last name and Fundraiser Id

⚠ For the import of the fundraiser, do NOT match Fundraiser First Name, Fundraiser Last Name. These are used for uploading of donations (hard credit) and linking the donation to Fundraisers (soft credit).

Import File Field	System Field	Status
-- Please select --	DpsBillingId	✓
-- Please select --	Email	✓
first name	First Name	✓
-- Please select --	Freight	✓
-- Please select --	Frequency	✓
-- Please select --	Fundraiser First Name	⚠
fundraiser id	Fundraiser ID	✓
-- Please select --	Fundraiser Last Name	⚠
-- Please select --	Invoice No.	✓
last name	Last Name	✓
-- Please select --	Merchant Fee	✓

This Import File Line Item field has no equivalent in the Payment Txn Object

1.3. Save Mappings for future loads

Enter a name for the Saved Mapping (1) and then press the Save Mapping button

Note, Saved mappings will now appear under the Import Type picklist on the first step of the Import Files wizard

The name before the " - " will be used as the Fundraiser Source. The Fundraiser Source is then stored on the the Contact "Fundraiser ID Source" and related list to the Contacts "Fundraiser IDs".

In the example below, the Fundraiser Source will be "Raisley"

If you are trying to upload Fundraiser Source and the fundraising No. to populate the Contact - related list "Fundraiser IDs", then please pay particularly close attention to the details in this procedure:

- Contact Upload Only checkbox on the first step is selected
- The template name used has {fundraising source} - {description}. There is a space before and after the hyphen " - ".

Import File - Step 2

Import Type Template: **Raisley - Fundraisers**

Column in uploaded file	Map to Payment Txn Field	Translation Code	Regular Expression
-- Please select --	Account No.		
-- Please select --	Amount		
-- Please select --	Bank		
-- Please select --	Bank Account Name		
-- Please select --	Bank Deposit Date		
-- Please select --	Billing Token		

Buttons: Previous, Cancel, **Save Mapping**, **Import**

1.4. Submit for importing.

When finished mapping all fields, press the "Import" button.

After the import has finished press close

Return Code: ⚠️ This Import File Line Item field has no equivalent in the Payment Txn Object

State: ✓

Street: ✓

Subscribe to Email Updates: ✓

Suburb/Town: ✓

Tax Amount: ✓

Title: ✓

Transaction Date: ✓ use the standard date format dd/mm/yy

TxnRef: ✓

Uploading Progress

Your request has been submitted and you will receive an email confirmation once the updates are complete.

APEX CLASS	CREATED DATE	CREATED BY	STATUS	COMPLETION DATE
importFileUploadProcessor	30/05/2019 3:00 PM	Anusree Parabath	Completed	30/05/2019 3:00 PM

Close

1.5. Process uploaded data

From the Import File header, Press Process.

The screenshot shows the 'Import File' header for file ID I20190530006. The 'Process' button is highlighted with a red box. Below the header, the 'Details' section shows the following information:

Merchant Facility	Payment Form	Total Amount	No. of Line Items	No. of Lines with Errors	Import Type
DEMO FACILITY	7. Appeal	\$0.00	3	0	Fund Raiser

The 'Import File Line Items (3)' section shows the following details:

Line No.	Amount	Transaction ...
1		
2		
3		

The press Process button again to confirm.

The screenshot shows the 'Import File' 'Process Uploaded Items' section. The 'Process Transactions' button is highlighted with a red box. The section displays the following information:

Import Name	Merchant Facility	Payment Form	Import Type	Contact Load Only	Import From	Campaign	Import Date	No. of Line Items	No. of Lines with Errors	Total Amount
I20190530006	DEMO FACILITY	7. Appeal	Fund Raiser	✓	File Upload		30/05/2019	3	0	\$0.00

1.6. Wait for batch processor to complete

The Import files - Process uses the import line items data to create Payment Txn's.

After this process has completed, the Batch Processor will use the Payment Txn information to create/update objects just as Contacts, Accounts, Campaign members. You should wait for this process to complete first before uploading donations.

2. Matching Rule setup

As a once off setup, make sure the matching rules on the Merchant Facility include the "Fundraiser ID" option

3. Import Donations

3.1. New import file for donations

Start a new import file for the donations.

Make sure your import file includes details for the donor and the donations, such as first name, last name, donation amount

AND columns for the fundraiser that is linked to the donation, such as fundraiser first name, fundraiser last name, fundraiser id (NOTE these details should have been included in the upload of fundraisers in this procedure)

The screenshot shows the 'Import File - Step 1' interface in the Payments2us application. The form is designed for importing data into Salesforce. Key fields include:

- Merchant Facility:** A search field containing 'DEMO FACILITY'.
- Payment Form:** A search field containing '2. Donation with option c'.
- Import Type:** A dropdown menu set to 'Custom'.
- Import From:** Radio buttons for 'File Upload' (selected) and 'Copy/Paste'.
- Header On Row:** A text input field.
- Campaign:** A search field.
- Automatically Create Child Campaigns:** A checkbox.
- Contact Load Only:** A checkbox.
- Import Date:** A date field set to '30/05/2019' with a calendar icon.
- Notes:** A large text area for additional information.
- File Upload Details:** A section at the bottom showing 'File Name' as 'Donations.csv' and a 'Choose File' button.

3.2. Map CSV columns

Map the column in the CSV file with the data elements in Salesforce. Be sure to include a minimum of the fields highlighted below.

Once all you mapping is complete. Press the Import button and wait for the import processing to complete.

 It is recommended that you use a Import File Template. You can enter any value you wish here and press Save Mapping (so it can be used for future use).

Note the name before the " - " is used for payment source and for the Fundraiser Id Source. In the example below, the Fundraiser ID source is set as "Raisley". This is important when using with multiple fundraising platforms as the same contact could be linked with multiple sources. The Fundraising Source is used as part of the matching process to ensure it link the donation with the correct fundraiser.

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Import File

Previous Cancel Save Mapping Import

Import File - Step 2

Import Type Template: Donations

COLUMN IN UPLOADED FILE	MAPS TO...	EXISTING PAYMENT TXN FIELD	RECEIVING FIELD EXISTS	MANDATORY TO PROCESS	COMMENTS
Please select	Account No.		✓	✓	
Donation	Amount		✓	✓	
Please select	Bank		✓	✓	
Please select	Bank Deposit Date		✓	✓	use the standard date format dd/mm/yy
Please select	Biller Code		✓	✓	
Please select	BIS No.		✓	✓	
Please select	Campaign Name		✓	✓	
Please select	Comments		✓	✓	
Please select	Country		✓	✓	
Please select	Credit Card CCY to Process		✓	✓	
Please select	Credit Card Expiry MMYYYY		⚠		This Import File Line Item field has no equivalent in the Payment Txn Object
Please select	Credit Card No to Process		✓	✓	
Please select	Currency		✓	✓	
Please select	Donation Amount		✓	✓	Decimal values may be truncated during processing
Please select	Donation By		✓	✓	
Please select	Donation By/Company Name		✓	✓	
Please select	Opportunity		✓	✓	
Please select	Email		✓	✓	
First name	First Name		✓	✓	
Please select	Freight		✓	✓	
Please select	Frequency		✓	✓	
Fundraiser first name	Fundraiser First Name		⚠		This Import File Line Item field has no equivalent in the Payment Txn Object
Fundraiser id	Fundraiser ID		✓	✓	
Fundraiser last name	Fundraiser Last Name		⚠		This Import File Line Item field has no equivalent in the Payment Txn Object
Please select	Invoice No.		✓	✓	
Last name	Last Name		✓	✓	
Please select	Merchant Fee		✓	✓	
Please select	Method of Payment		✓	✓	

3.3. Process Imported data

From the Import File, press the Process Button

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Import File

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Process Edit

Import File ID: I20190530008

Merchant Facility	Payment Form	Total Amount	No. of Line Items	No. of Lines with Errors	Import Type
DEMO FACILITY	2. Donation with option of regular giving	\$4,500.00	3	0	Donations

Details

Import Name: I20190530008

Merchant Facility: DEMO FACILITY

Payment Form: 2. Donation with option of regular giving

Import Type: Donations

Campaign:

Automatically Create Child Campaigns:

Owner: Anusree Parabath

No. of Line Items: 3

No. of Lines with Errors: 0

No. of Credit Card Charge Errors: 0

Has Credit Cards to Process:

Total Amount:

Import File Line Items (3)

IL0000011
Line No.: 1
Amount: \$1,000.00
Transaction ...

IL0000012
Line No.: 2
Amount: \$1,500.00
Transaction ...

IL0000013
Line No.: 3
Amount: \$2,000.00
Transaction ...

Then process again to confirm

The screenshot shows the 'Process Uploaded Items' window in the Payments2us Salesforce interface. The window displays the following details:

- Import Name: I20190530008
- Merchant Facility: DEMO FACILITY
- Payment Form: 2. Donation with option of regular giving
- Import Type: Donations
- Contact Load Only: ☐
- Import From: File Upload
- Campaign:
- Import Date: 30/05/2019
- No. of Line Items: 3
- No. of Lines with Errors: 0
- Total Amount: \$4,500.00
- Notes:

At the bottom right of the window, there are two buttons: 'Process Transactions' and 'Cancel'.

3.4. Wait for Batch Process to complete

The Import File process creates Payment Txns.

There is a separate process that runs approximately every 10 minutes. This process uses the information in the Payment Txn file to create/update Accounts/Contacts/Campaign Members/Opportunities etc.