

Importing Data

Avoid wearing out your team with tedious data re-entry. If you have used software in the past or even if you have information in a spreadsheet format, we will work with you to migrate it onto your site. Your donor list is often the most valuable data, but sales items and some items may be worth loading.

The key to successful migration is a clean spreadsheet. You know your data better than us so, for example, having the phone numbers, street addresses or first names all in the the correct columns will make your team's effort easier when it is on your site and it needs to be cleaned up.

Contact support@tofinauctions.com with your request and attach the data to be imported. (If you have a specific deadline, please include that in the request.)

If you look at the data entry screens for donors, users, or items, you will see what boxes exist for you to fill with data. When a column is included in your data that does not match the site's dataset, we will try to adapt by putting it in the Notes section.

There are four distinct imports but the basic data elements of Users appear in all the others.

1. Donors

2. Users - All Individuals (Donors, ticketholders, volunteers etc.)

3. Donor and Items

4. Ticketholding Guests

1. Donors

Pro Save typing and keep notes from past years.

Con None I can think of.

Match the column heads in this Spreadsheet of Donor Data Elements ([CSV](#)) ([Excel](#)) for best import results.

DONOR DETAIL GLOSSARY

Below are the list of data elements most common to imported donor lists in the order they occur in the dataset. (Think of this a continuous row of headings that extend in a single line.)

Required field is either the business name or the First name.

tracking_identifier (unique Identifier from another database)/ **procurement_agent** (solicitor responsible for this Donor) / **misc** (empty field for self determined use) / **is_donor** (Yes or No) /

is_public_donor (Yes or No) / **is_business** (Yes or No) / **business_name** (name of the Business) / **contact_person** (business contact) / **contact_person_title** (Role or title of the business contact) / **first_name** (Individual Donor first name) / **last_name** (Individual Donor last name) / **relationship_to_school** (empty field for self determined use) / **address** (street address) / **city** / **state** (2 Letter abbrev..) / **zip** / **phone_primary** / **phone_secondary** / **fax** / **website** / **email_primary** / **email_secondary** / **im_primary** (Instant message address) / **im_secondary** / **notes** (empty field for self defined use) / **bio_page** (Text description when donor is made public) / **is_sponsor** (Yes or No) / **county** / **employer** / **occupation** / **city_of_employment** / **udf_"field_name"** Addition fields indicated by labeling column head - udf_"column_name"
E.G. udf_maiden_name = Maiden Name .

Common reasons Donor Import is Delayed.

- Not clear whether the donor is an individual or a a business. "Person's name in Business name column and in First and Last Name columns."
- Extra fields that do not have a **udf_** in front of the column name being imported. Extra fields can be accommodated as long as they are labeled.

2. Users - All Individuals (Donors, ticketholders, volunteers etc.)

Pro Save typing if tickets are entered internally to record snail mail RSVP's. The existing User can be connected to a ticket.

Con If tickets are sold online duplicate records are created.

Match the column heads in this Spreadsheet of all User (person/donor/ticketholder) Data Elements ([CSV](#)) ([Excel](#)) for best import results.

Below is every data element that may be filled in at some time if an individual is listed in the database.

Bidder number, Is donor, Is public donor, Is ticket holder, Has checked in, Is business, Business name, Contact person, Contact person title, First name, Last name, Relationship to school, Address, City, State, Zip, Phone primary, Phone secondary, Fax, Website, Email primary, Email secondary, Im primary, Im secondary, Notes, Bio page, Is active, Created on, Updated on, Vegetarian meal, Seat assignment, Is sponsor, Is linked, Save credit card info, County, Employer, Occupation, City of employment,

3. Donor and Items (When you signed up late after most of your donations were entered into a spreadsheet)

Pro Save data entry and item editing.

Con Complicated data that may require heavy editing after importation.

Match the column heads in this Spreadsheet of Donors and Items (each item has a donor) Data Elements ([CSV](#)) ([Excel](#)) for best import results.

Below is every data element that may be filled in at some time if an individual is listed in the database.

is business, is public donor, business name, contact person, contact person title, relationship to school, first name, last name, address, city, state, zip, phone primary, phone secondary, fax, website, email primary, email secondary, im primary, im secondary, notes, category name, type name, item name, list as priceless, fair market value, buy now price, min bid, min raise, closing time, description, restrictions, private notes, is visible to public

4. Ticketholding Guests

Pro If you have purchased the auction software late in the game so all the tickets are already sold and paid for elsewhere, you can save data entry.

Con It is much better to type items directly into the web site rather than into some other format that has to then be manipulated and imported.

The most complex import because the person/Guest needs to be associated with a ticket type, a buyer, and a payment. [See instructions.](#)

Match the column heads in this Spreadsheet of Ticketholders ([CSV](#)) ([Excel](#))