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NPSP: Uploading Opportunities

This article walks through the basic process of uploading Opportunities to be associated with already existing Contacts or Accounts in your system, utilizing some NPSP-specific fields.

Determine Your 'External Id'

You'll first need a way to associate your new incoming donations/Opportunities with your existing Contacts. If your organization is small, the last name may be sufficient. If you have a larger organization, a member or donor Id can be of assistance, an email address, or a randomly assigned external Id can also be used. Provided the value is **unique** and can be found on **both your Contact/Account records as well as on your donations/Opportunities** to be uploaded, any value will suffice.

In the image below, we show two open .csv files. On the left, we see a list of four Salesforce Contacts, with an additional field called 'External Id' which is a unique identifier. On the right, we see a list of four donations, with an external id that matches one the Contacts on the left, an amount, and also the date of the donation.

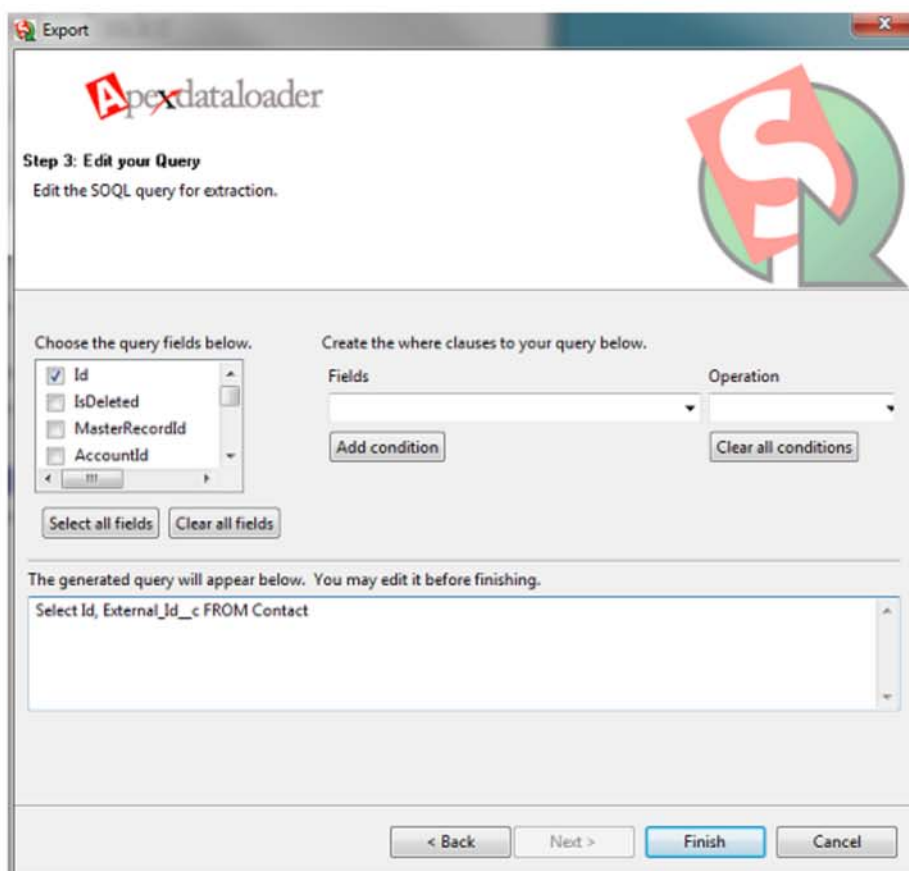
The image shows two Excel spreadsheets side-by-side. The left spreadsheet, labeled 'Book1', has columns A through D: ID, FirstName, LastName, and ExternalId. The right spreadsheet, labeled 'Book2', has columns A through G: ExternalId, Amount, Date, and three empty columns (D, E, F). Red circles are drawn around the 'ExternalId' column in both spreadsheets. Two red arrows point from the 'ExternalId' column in the left spreadsheet to the 'ExternalId' column in the right spreadsheet, indicating a data mapping or export process.

ID	FirstName	LastName	ExternalId
1	0038000001CWZ1	Kevin	12345
2	0038000001CWZ1	Steve	12345
3	0038000001CWZ1	Nick	34567
4	0038000001CWZ1	Evan	45678

ExternalId	Amount	Date
12345	\$125.00	5/12/2013
12345	\$150.00	4/15/2013
34567	\$400.00	4/30/2013
45678	\$150.00	6/1/2013

Export Your Contacts/Accounts with their Id and your External Id

You can utilize any number of tools to export and import data into your Salesforce org. For this tutorial, we'll make use of the Apex Data Loader. Instructions on downloading and configuring the Data Loader can be found here (</articles/Resource/Downloading-and-Configuring-the-Apex-Data-Loader>). Instructions on exporting data can be found here (</articles/Resource/Exporting-Data-with-the-Apex-Data-Loader>). You'll need to export at least two fields from your Contacts and/or Accounts, the Salesforce Id as well as the field you're using for your external Id. In the image below, we're exporting the Id and External_Id__c fields from Contact.



Export

Apexdataloader

Step 3: Edit your Query
Edit the SOQL query for extraction.

Choose the query fields below.

- ☒ Id
- ☐ IsDeleted
- ☐ MasterRecordId
- ☐ AccountId

Select all fields Clear all fields

Create the where clauses to your query below.

Fields Operation

Add condition Clear all conditions

The generated query will appear below. You may edit it before finishing.

Select Id, External_Id__c FROM Contact

< Back Next > Finish Cancel

Join Your .csv Files

Once we have our two files locally, we'll need to join them together based on the external Id located in both files.

We'll add the Contacts' (or Accounts) Id to the file containing our Opportunity information. We can do this through a few different mechanisms, we'll touch on two here.

vLookup

Microsoft Excel offers the vLookup functionality. This searches one datasheet and applies matches in the data to the other. There are quite a few examples to using vLookup, so we'll point to those instead of rehashing them here.

There's a great video available here (http://www.youtube.com/watch?v=3tk_Mif7040). There is also the official Microsoft documentation available here (<http://office.microsoft.com/en-us/excel-help/vlookup-HP005209335.aspx>).

Table Join

A table join uses SQL to bring two tables of data together based on a common column. This can be done in a program such as MS Access, MySQL, MS SQL Server, or many others. After loading the .csv files into their own separate tables (follow the documentation for whatever database you're using to do this), you'll then need to construct a query between those two tables to select the values you'd like. The query would appear something like

the following MS SQL Server:

```
select c.ID, o.CloseDate, o.Amount from MyNewOpportunities o  
left join MyContacts c on c.External_ID = o.External_ID
```

Select my Contact's Id, and the Opportunity Close Date and Amount from my list of Opportunities. Get the Contact ID from MyContacts table where the two External Ids are equivalent.

3rd Party Apps

There are also several 3rd party tools available via the AppExchange (<http://appexchange.salesforce.com/>) that provide some level of functionality around this. Apsona (<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JejzEAC>) and DemandTools (<https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016bXjEAI>) both offer variations on these approaches.

Define Your Fields

We now need to create our final .csv file for import. The following fields are the most commonly used column headers for your Opportunities, those marked with an (*) are required for your insert to be successful.

API Name	Description
AccountId*	<p>The Id of the Account this Opportunity should be associated with. This can either be a 1x1 Account or regular Account. This field can be left blank only if the npe01__Contact_Id_for_Role__c field is filled in.</p> <p>The value should always start with '001' and be either 15 or 18 digits long</p>

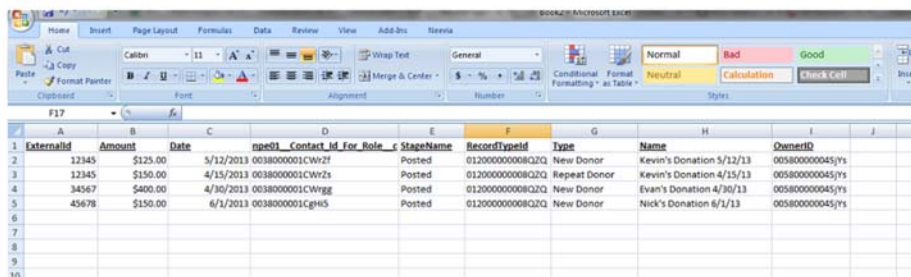
API Name	Description
RecordTypeId	<p>The RecordTypeId for your Opportunity's record type. While not required, failing to provide a value will result in the Opportunities being inserted with your default Opportunity record type</p> <p>The value should always start with '012' and be either 15 or 18 digits long</p>
IsPrivate	<p>A boolean value indicating if the donation is considered private</p> <p>The value can be one of: '0', '1', 'true' or 'false'</p>
Name*	<p>The name to be used for the Opportunity</p> <p>A text value, 120 characters limit</p>
Description	<p>The Opportunity Description field</p> <p>A text value, 32k characters limit</p>
StageName*	<p>The value of an existing stage from your Stage picklist. Common values include 'Posted' or 'Closed Won'. Check your individual organization for the appropriate stage</p> <p>A text value, matching an existing stage name</p>
Amount*	<p>The total amount of the Opportunity</p> <p>A valid monetary decimal.</p>
CloseDate*	<p>The close date for the Opportunity</p> <p>A date value in the MM/DD/YYYY format, or DD/MM/YYYY format for non-US locales</p>

API Name	Description
Type	<p>A value for the Type field on the Opportunity</p> <p>A text value, matching an existing Type</p>
LeadSource	<p>A value for the Lead Source field on the Opportunity</p> <p>A text value, matching an existing Lead Source</p>
CampaignId	<p>An Id of an existing Campaign in Salesforce to populate the Primary Campaign Source field on the Opportunity</p> <p>The value should always start with '701' and be either 15 or 18 digits long</p>
OwnerId	<p>An Id of a valid Salesforce user who will be the Opportunity owner, this value will default to the uploading user if not provided</p> <p>The value should always start with '005' and be either 15 or 18 digits long</p>
npe03__Recurring_Donation__c	<p>An Id of a valid Salesforce Recurring Donation that this Opportunity is associated with</p> <p>The value should always be either 15 or 18 digits long</p>
npe01__Contact_Id_for_Role__c*	<p>The Id of the Contact this Opportunity should be associated with. This field can be left blank only if the AccountId field is filled in</p> <p>The value should always start with '003' and be either 15 or 18 digits long</p>

API Name	Description
npe01__Member_Level__c	<p>A value for the Membership Level field on the Opportunity</p> <p>A text value, matching an existing Membership Level</p>
npe01__Membership_End_Date__c	<p>The Membership End Date for the Opportunity</p> <p>A date value in the MM/DD/YYYY format, or DD/MM/YYYY format for non-US locales</p>
npe01__Membership_Origin__c	<p>A value for the Membership Origin field on the Opportunity</p> <p>A text value, matching an existing Membership Origin</p>
npe01__Membership_Start_Date__c	<p>The Membership Start Date for the Opportunity</p> <p>A date value in the MM/DD/YYYY format, or DD/MM/YYYY format for non-US locales</p>
npe01__Do_Not_Automatically_Create_Payment__c	<p>A boolean value indicating if a payment record should be automatically created for this Opportunity</p> <p>The value can be one of: '0', '1', 'true' or 'false'</p>
bde__Batch__c	<p>A Salesforce Id for the Batch that this Opportunity should be associated with</p> <p>The value should always be either 15 or 18 digits long</p>

Finalize Your Import, and Import!

Once you've mapped your fields and created your final .csv file, you're ready to import. Simply follow the click-through steps in the Apex Data Loader after selecting the 'Insert' operation. If you used the row-headers shown above, you'll be able to use the Auto-Match capability to automatically map your Salesforce fields to the column headers in your .csv file. The image below shows a ready-to-go .csv file with four new Opportunities.



ExternalId	Amount	Date	npes01_Contact Id For Role	StageName	RecordTypeId	Type	Name	OwnerId
12345	\$125.00	5/12/2013	0038000001CWr2f	Posted	012000000008Q2Q	New Donor	Kevin's Donation 5/12/13	0058000000045Ys
12345	\$150.00	4/15/2013	0038000001CWr2s	Posted	012000000008Q2Q	Repeat Donor	Kevin's Donation 4/15/13	0058000000045Ys
34567	\$400.00	4/30/2013	0038000001CWrgg	Posted	012000000008Q2Q	New Donor	Evan's Donation 4/30/13	0058000000045Ys
45678	\$150.00	6/1/2013	0038000001CgHb5	Posted	012000000008Q2Q	New Donor	Nick's Donation 6/1/13	0058000000045Ys



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(/_ui/core/userprofile/UserProfilePage?u=00580000003egB0AAI) Contribution by Kevin Bialstra/Alice 2.0 User profile

/UserProfilePage?u=00580000003egB0AAI)

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