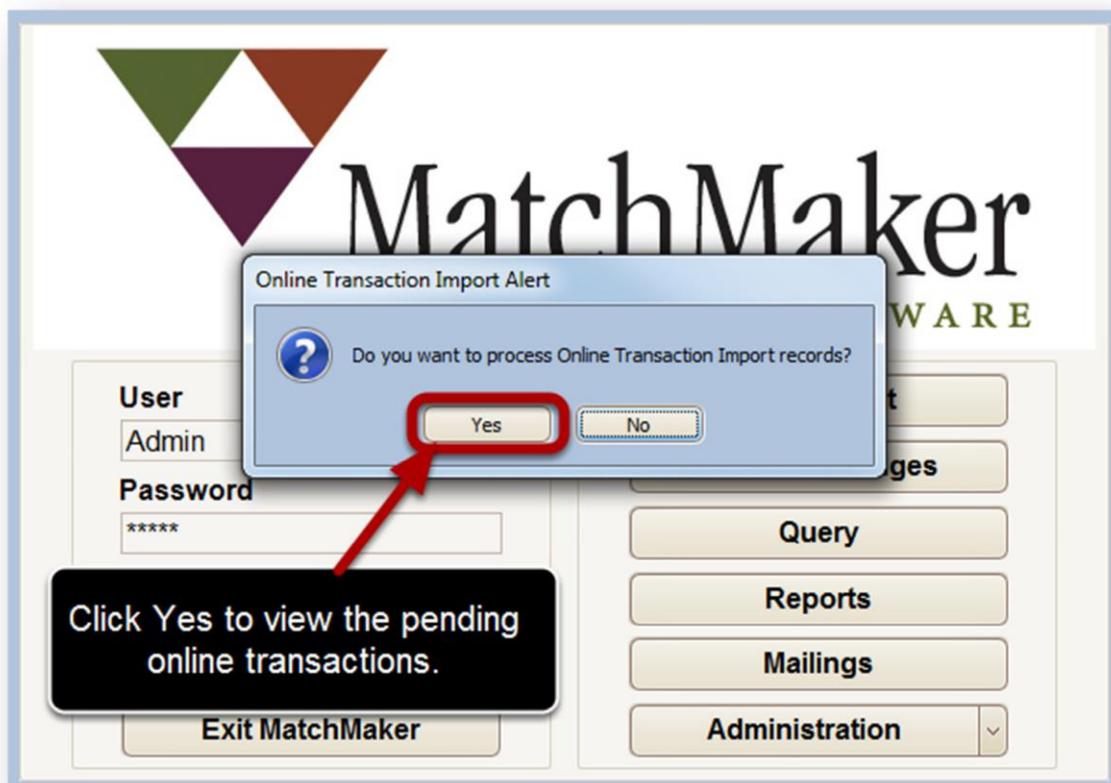


# Guide for Online Donation Import into MatchMaker FundRaising Software

This guide will provide basic instructions for importing online donations, online event registrations, and online membership into MatchMaker FundRaising Software

## Online Transaction Notification



When a user logs on to MatchMaker FundRaising Software, the application will notify the user of impending online transactions. Click Yes to view the online transactions.

## Online Transaction Dashboard

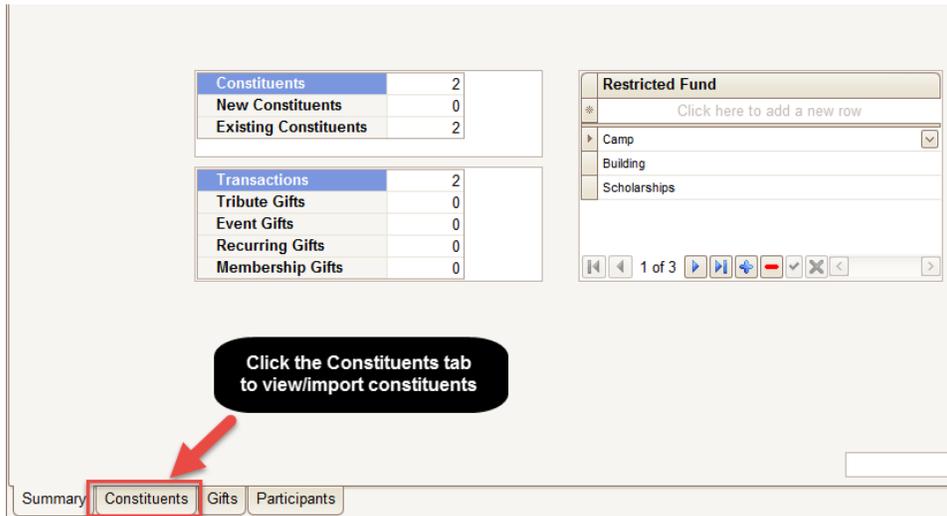
The screenshot displays the Online Transaction Dashboard with three numbered sections:

- 1 Constituents**: A table showing 4 total constituents, with 2 new and 2 existing.
- 2 Transactions**: A table showing 4 total transactions, including 0 Tribute Gifts, 1 Event Gift, 0 Recurring Gifts, and 1 Membership Gift.
- 3 Restricted Fund**: A list of funds including Camp, Building, and Scholarships, with a 'Click here to add a new row' link and a pagination bar at the bottom.

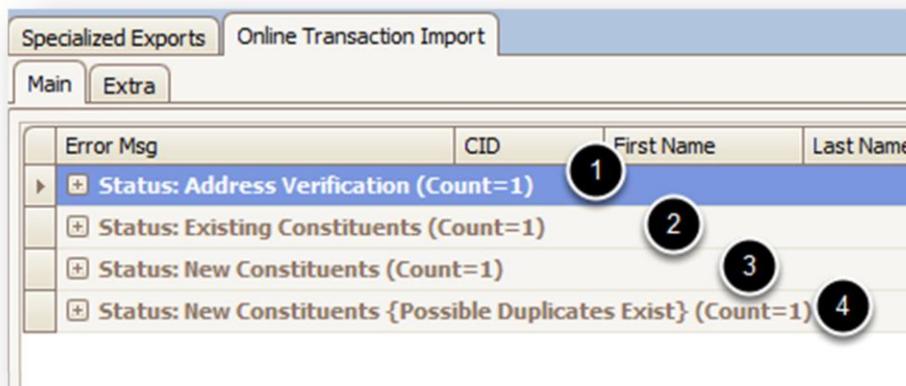
The Online Transaction Dashboard is the first screen to appear when online transactions are present.

1. Constituents - This summary represents the total number of online donors which need to be handled. The summary shows the number of online donors who are existing constituents in your database and the number of online donors who are new to the database.
2. Transactions - This summary represents the total number of transactions to be handled. The summary displays the type of transaction, such as Tribute Gifts, Event Gifts, Recurring Gifts or Membership Gifts.
3. Restricted Fund - By entering a Fund in this list, any online transaction with the corresponding fund will have a *Restricted* Purpose code.

## Import New Constituents



## Constituent Status Messages



The constituents tab will list all online donors by their current status in MatchMaker FundRaising Software.

1. Status: Address Verification - MatchMaker has found the donor's email in the database, but the address they entered into the online form does not match what is in MatchMaker.

2. Status: Existing Constituents - MatchMaker has found the donor's email and the address entered on to the online form matches what is entered into MatchMaker.
3. Status: New Constituents - MatchMaker did not find the donor's email address in the database and the donor's last name does not match any constituent in the database.
4. Status: New Constituents {Possible Duplicates Exist} - MatchMaker did not find the donor's email address in the database, but the donor's last name matches an existing constituent in the database.

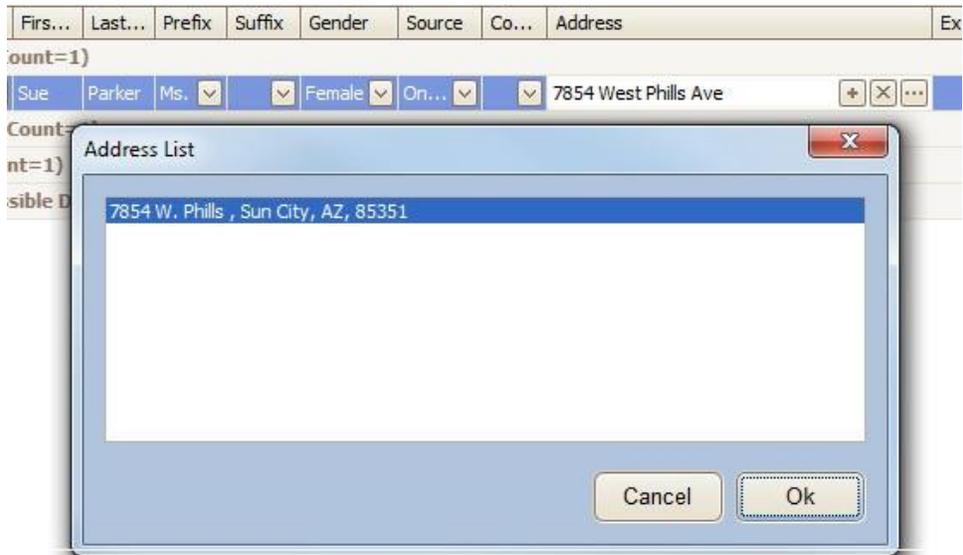
## Handling Constituent Status Message - Address Verification

Error Msg	CID	First Name	Last Name	Prefix
<input type="checkbox"/> + Status: Address Verification (Count=1)				
<input type="checkbox"/> Status: Existing Constituents (Count=1)				
<input type="checkbox"/> + Status: New Constituents (Count=1)				
<input type="checkbox"/> + Status: New Constituents {Possible Duplicates Exist} (Count=1)				

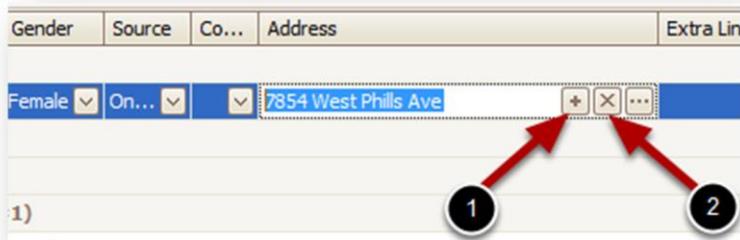
Click the on the plus to view the donors with the Address Verification Status.

Error Msg	CID	Firs...	Last...	Prefix	Suffix	Gender	Source	Co...	Address
<input type="checkbox"/> Status: Address Verification (Count=1)									
<input type="checkbox"/> {538} [CID Match/Ad... ..]		Sue	Parker	Ms.		Female	On...		7854 West Phills Ave

Click the three dot button to view the addresses currently in MatchMaker for the constituent.



The dialog box will open and list the existing addresses in MatchMaker FundRaising Software. At this point, you need to determine if the address is new to this constituent or if it needs to be ignored. Click the Ok button to close the dialog box.



1. Click the Plus button to add a new address.
2. Click the X button to ignore the new address.

In the case of this example, we can see that the address in MatchMaker is a close match, but street direction and the Ave designation are different. We would ignore the new address by clicking the X button.

After you have made your selection click the Save Changes/Refresh Status button in the lower left corner to update the status of the record.

## Handling Constituent Status Message - New Constituents {Possible Duplicates Exist}

Error Msg	CID	First Name	Last Name	Prefix
+ Status: Address Verification (Count=1)				
+ Status: Existing Constituents (Count=1)				
+ Status: New Constituents (Count=1)				
+ Status: New Constituents {Possible Duplicates Exist} (Count=1)				

Click on the plus to view the New Constituents with Possible Duplicates.

+ Status: New Constituents {Possible Duplicates Exist} (Count=1)				
+ Possible Duplicates Exist				
... Dan Ramos Mr. v				

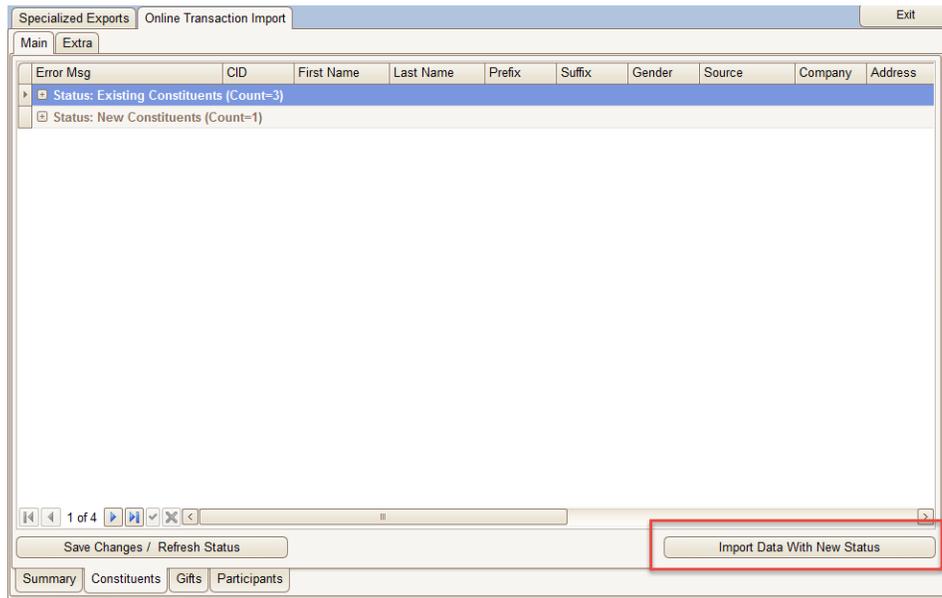
Click the plus next the label Possible Duplicates Exist to view the duplicates.

+ Status: New Constituents {Possible Duplicates Exist} (Count=1)							
+ Possible Duplicates Exist							
... Dan Ramos Mr. v							
v Male v On... v							
v 85632 E. Camden							
Possible Duplicates							
Match First Name Last Name Address City State Zip							
Last Name Match v Daniel Ramos 85632 E. C... Chandler AZ 85224							

Review the duplicate list. If a duplicate does exist, click the check mark button in the first column. This will assign the gift transaction to the existing donor in the database. It will also add the email address to the existing constituent. If the constituent is new, do nothing.

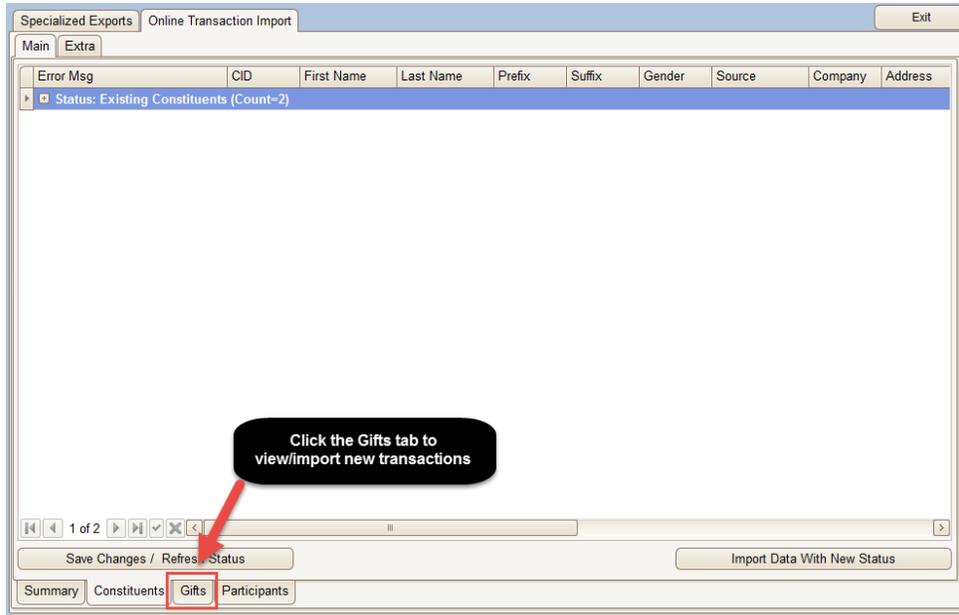
Click the Save Changes/Refresh Status to update your constituent list.

## Import Constituents with New Status

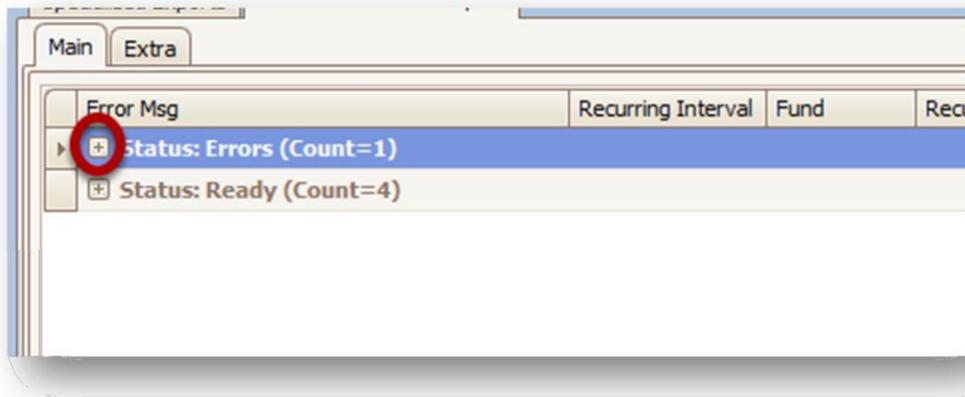


Before you can import gift transactions you must import any data with a New Status. Click the button in the lower right corner of the screen labeled *Import Data With New Status*. After clicking the button all New Constituents will become Existing Constituents.

## Import New Gifts

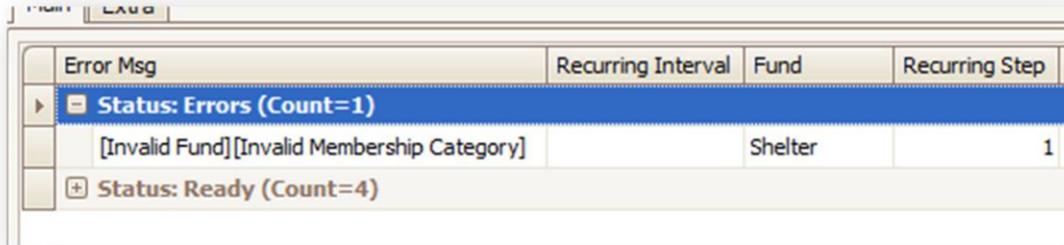


## Gifts Status Messages



All new transactions will be ready to import or need errors corrected. If a transaction has errors click the plus next to the Status: Errors.

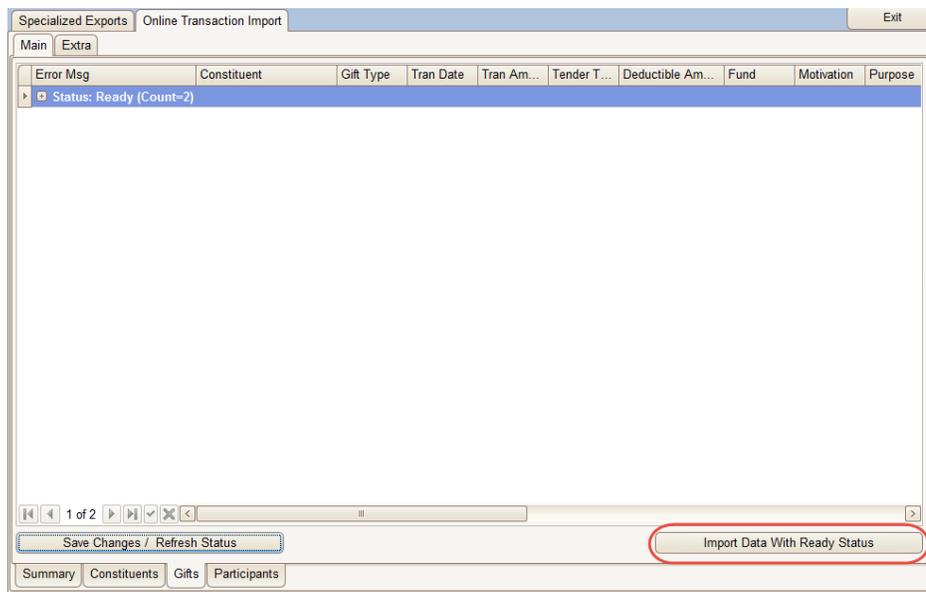
## Gifts Status - Errors



Error Msg	Recurring Interval	Fund	Recurring Step
Status: Errors (Count=1)			
[Invalid Fund][Invalid Membership Category]		Shelter	1
Status: Ready (Count=4)			

The error message will be listed in the first column of the transaction. In this example, the donor selected a fund from the online form that is not in MatchMaker. You have the option to go to list maintenance and add the fund or modify the fund on the transaction by clicking in the fund column and selecting a fund from the existing list. Once the error(s) are corrected click the Save Changes/Refresh Status button in the lower left of the screen.

## Import Gifts with Ready Status



Click the button Import Data With Ready Status in the lower right to import new transactions into MatchMaker.

Transactions will be ready to be batched and posted on the Gift Transaction screen.