

Crowdfunding

- This process outlines how to import crowdfunding data onto Raiser's Edge once a project is complete
- You will need training in and access to ImportOmatic

Pre-Import

1. You will receive either a report from the Regular Giving Officer (Hubbub report) that details the crowdfunding donations for the particular project (open up the file) OR
2. Follow the link in the email from the Regular Giving Officer and download the report (found on the dashboard tab).



PROJECT SPONSORS

[Download Report](#) [Message All Sponsors](#)

£1 Select this reward if you just want to donate to the project without receiving a reward. [Message Sponsors](#) ⓘ

Sponsor's Name	Delivery Address	Payment			
		Method	Status	Amount	GiftAid
GrahamWinterbone	No reward selected, address withheld.	stripe	✓	£50.00	✓

3. **Check if there are any failed payments** – this info is column D of the file. We only want to import the successful payments so delete rows that have a payment status 'failed'.
4. **Check if there are any cash payments** – do not need to import to RE so delete.
5. Save the file as a CSV in a location of your choice on the P Drive.

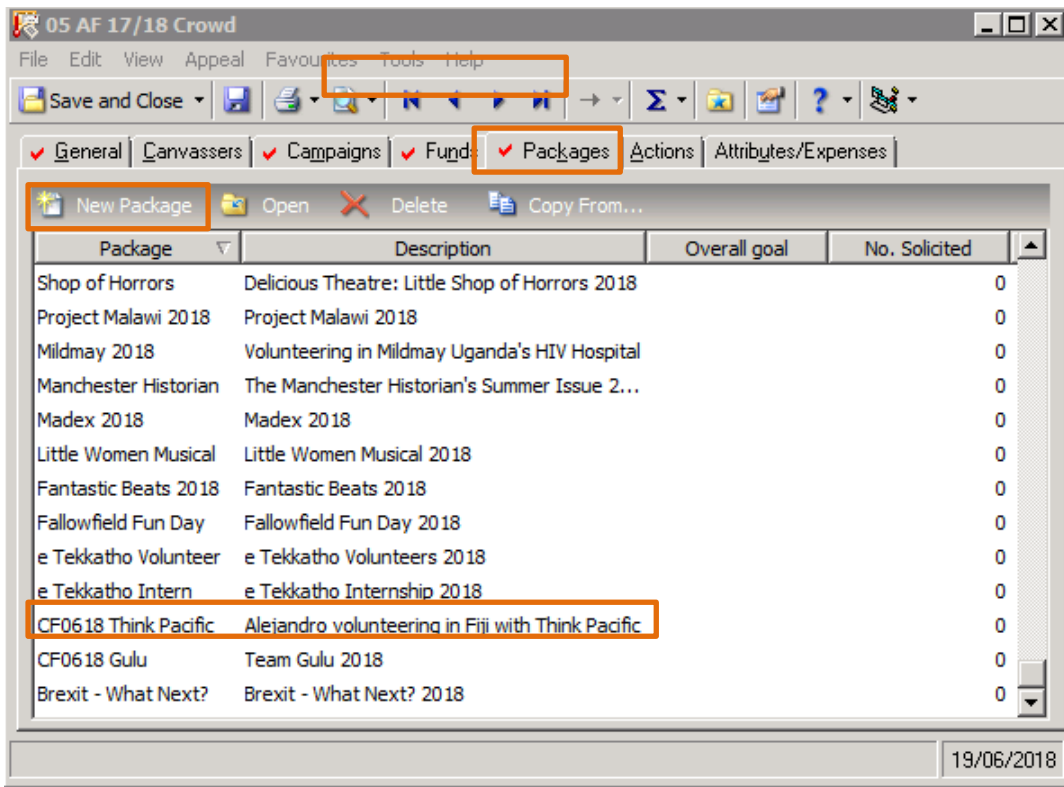
For info: if an individual has given to the project more than once, they will be on the file equal to the number of times they donated. So some individuals may have more than 1 row of data.

6. Add the package to the appeal

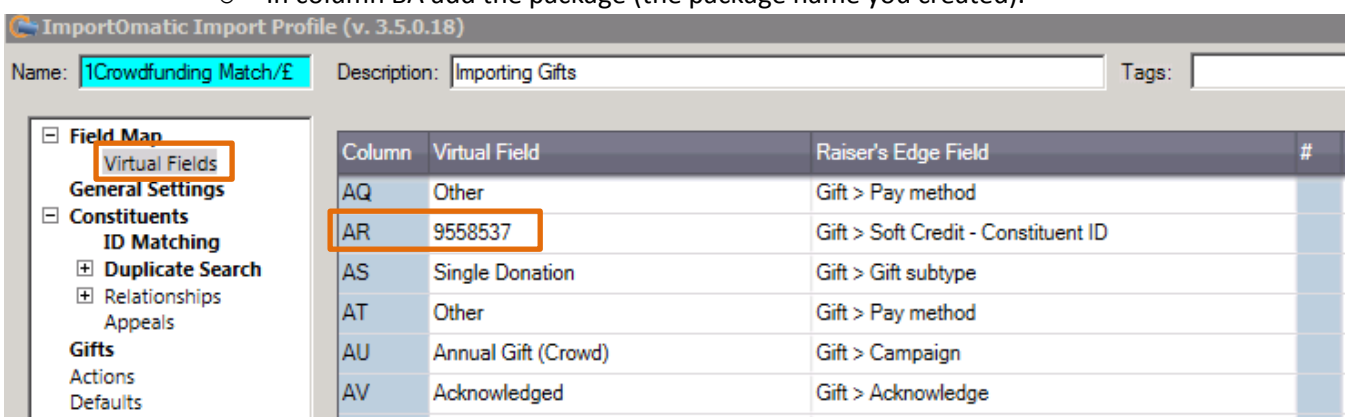
1. Go to 'records' → 'appeals' tab → 'open an appeal' on the right hand side
2. The box will appear → type the ID for the relevant crowdfunding year. E.g, '04 RG 18/19 Crowd' and 'find now'

The screenshot shows the Raiser's Edge interface. On the left, a sidebar contains navigation options: Constituents, Gifts, Actions, Campaigns, Funds, Appeals (highlighted), Memberships, Jobs, and Events. The main area is titled 'Appeals' and includes a 'New Appeal' button. An 'Open' dialog box is displayed in the foreground, with 'Find: Appeal' and 'Search using query: <Default>'. The results table shows one entry: '05 AF 17/18 Crowd' with description '05 AF 17/18 Crowdfu...' and start date '01/08/2017'. The 'Find Now' button is highlighted in the dialog.

3. Double click on the appeal
4. Go to the packages tab → 'new package'



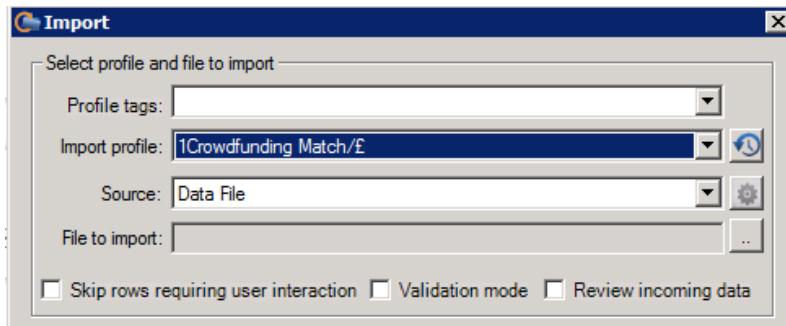
5. Input the...
 - **Package ID:** use format CF *month* *year* *project name*. There is a character limit so do the best you can with the project name.
 - **Description:** this can be the same or partly the same name as the package ID. If you could not fit the full project name in the ID, include this in the description.
6. Insert a column into column A – copy and paste new ConsIDs into this column using the document [here](#) to see the last CF ID used
7. Go to the Crowdfunding Profile **1Crowdfunding Match/£** in IOM (plug ins → IOM → Config)
 - o Go to 'virtual fields'
 - o In column AR add the constituent ID of the project owner – they are soft credited for every gift (ask the regular giving officer for the ID if not provided one).
 - o Sometimes the gifts need to be soft credited to more than one person. In the virtual fields, insert the appropriate number of lines copying the same format as the AR field (right click to insert new virtual field).
 - o In column BA add the package (the package name you created).



8. Save and close the IOM profile

Import 1 – Match/create records and add gifts

9. Use the IOM profile 1Crowdfunding Match/£ to import the file you saved earlier



- *Individual has an RE record and the RE data matches the Hubbub report*
 - They will be matched to their RE record and processed automatically
- *Individual has an RE record but the data doesn't exactly match incoming Hubbub data*
 - A box will appear showing a list of records RE has matched the individual to and each record has a score indicating how good the match is. Pick the record that matches – click **'match record'**. As some data does not match, e.g, the address, another box will appear where you have the option to choose which data to import, add new addresses, update names, etc.
- *Individual is not on RE*
 - RE will still try and match to an existing RE record if it can. The box will appear but you will be able to see that records in the list are not a match and a new record will need to be created – click **'add as a new record'**

Exceptions when importing

If you have any exceptions, make sure they have saved out to the I drive so you can investigate.

A common exception is 'Invalid Code table entry: Country' (for this, delete the value that is in the country field).

Once you have resolved the exceptions, save the exceptions file as a CSV to the P drive and run them through the same 1Crowdfunding Match/£ profile.

Post import tidying if you added new records

New records need an ID assigned and title added

1. Run the 'CHECK – Crowdfunding Gifts' query
2. If the name is clearly not a real name, e.g, 'Blink B', 'Nutty John', put these gifts on the anonymous record (DARO 7987) and delete the record that was created for the individual.
3. Add their 'Title' and gender
4. If claiming gift aid, check they have a valid address. If they don't set the gift to NO GA & let Emma Dixon know (she will get in contact to try and get a valid address)
5. Tidy the address if needed

Import 2 – Adding the gift aid declaration

6. Export the '**CHECK – Crowdfunding Gifts**' query and save in the P drive as a CSV.
7. Import the CSV into RE via IOM using the **1Gift Aid – Crowdfunding profile** (if you change the query output fields, you need to change your IOM profile). This will add gift aid declarations based on the gift aid status from the exported query.