

ATS Ultimate Spreadsheet Importer

A Difficult Task Made Easy

Presented by:

Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year



Hosted by



Presenter:

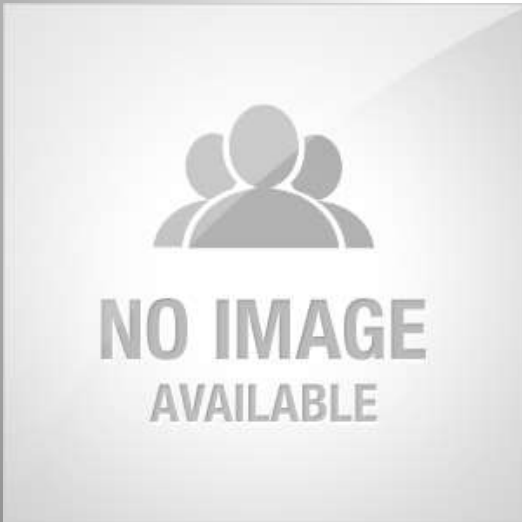
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What is the Ultimate Spreadsheet Importer?

- Stand-alone product that allows you to create and update records from an Excel spreadsheet into iMIS
- Create individual and/or company records and link individuals to companies
- Can create usernames and passwords for existing and new records
- Validate against general lookup tables
- Create Activity records
- Import into user-defined tables (single and multi-instance)



Benefits of Using the USI

- Allows for the creation of templates that simplify the matching process between iMIS and spreadsheets you import from the same source regularly
- Powerful de-duping algorithms to ensure your iMIS data stays clean
- Allows for easy integration of third-party data sets that are not real-time.
 - If you are using a third-party system check with our list of over 70 bridges to iMIS.



Applications

- Event Registration Import
 - Does not import actual registrations
- Third-party Mailing Lists
- Update user-defined table data from third-party sources
 - e.g. financial or population data about companies or cities
- Username/Password Generation
- Import Rosters for Large Member Companies/Organizations



Simple Installation & Setup

- Installed on local machine
- Simple wizard-based installer
- Configured to your iMIS database
- Login with your iMIS login and password



User Security

- Enable users access to run the USI using the ACCESS_KEYWORDS general lookup table with the ATSIMPORTER keyword.

The screenshot shows the 'General lookup/validation' interface. The 'ACCESS_KEYWORDS' table is selected, and the 'ATSIMPORTER' keyword is highlighted. A 'Desktop' arrow points to the table, and a 'Staff Site' arrow points to the table. A starburst callout says 'Add to User Credentials for each user'.

Code	Description
ATSCHECKINADMIN	ATSCHECKINADMIN
ATSIMPORTER	ATSIMPORTER
ATSTOREADMIN	Access to Online Marketplace Admin Portal
MNGR	Store Manager

General Lookup Tables for Duplicate Checking



- DUPLICATE_ADDRESS_STRINGS
- Creates duplicate checking for address abbreviations
- Don't need reciprocal
- The more you enter the smarter the USI gets

General tables	
DUPLICATE_ADDRESS_STRINGS	
Code	Description
Ave	Avenue
Blvd	Boulevard
Cir	Circle
Dr	Drive
E	East
N	North
NE	Northeast
NW	Northwest
Pky	Parkway
Rd	Road
Rt	Route
S	South
SE	Southeast
St	Street
Ste	Suite
SW	Southwest
W	West

General Lookup Tables for Duplicate Checking



- DUPLICATE_COMPANY_STRINGS
 - Accommodates for acronyms
 - Accommodates for abbreviations in company names

General tables

<u>Code</u>	<u>Description</u>
ATS	Association Technology Solutions
Corp	Corporation
Inc	Incorporated
Intl	International
KFC	Kentucky Fried Chicken

General Lookup Tables for Duplicate Checking



- DUPLICATE_FIRST_NAMES
 - Looks for shortened names

General tables

<u>Code</u>	<u>Description</u>
Bill	William
Bob	Robert
Dan	Daniel
Dave	David
Don	Donald
Doug	Douglas
Ed	Edward
Jeff	Jeffrey
Jim	James
Melissa	Missy

General Lookup Table for Allowance User-Defined Tables

- ATSIMPORTER General Lookup Table
- Enter the name as displayed in Customizer in Desktop under Customers>>Set up modules>>Additional Windows>>Define Windows

The image shows two screenshots from a software application. The top screenshot displays a table titled 'General tables' with a dropdown menu set to 'ATSIMPORTER'. The table lists various lookup tables with their codes and descriptions. A blue arrow points from the 'Name-Demo' entry in the table to the 'Window Designer' window below.

Code	Description
DUES_Activity	DUES_Activity
MEETING_Activity	MEETING_Activity
Name-Demo	Name-Demo
Name-Favorite_Things	Name-Favorite_Things
Name-Lists	Name-Lists
Name-Product_Reviews	Name-Product_Reviews
Name-Test_Results	Name-Test_Results
ORDER_Activity	ORDER_Activity

The bottom screenshot shows the 'Window Designer' window. The 'Current windows' dropdown is set to 'Name-Demo'. The 'Table' field is also set to 'Name-Demo', and the 'Number of columns' is set to 2. The 'Current fields' list includes: Spouse (Spouse), School Attended (School Attend), Sponsor (Sponsor), Mobile_Phone (Mobile Phone), Date_Certified (Date Certified), Staff_Size (Staff Size), Annual_Revenue (Annual Reven), Activity_Fee (Activity Fee), System_Type (System Type), EMERGENCY_NAME (Emergency), and EMERGENCY_PHONE (Emergenc). The 'Available fields' list includes: Board (Board), Newsletter, Key_Contact (Key Contact), Legislative, Exhibitor, Advertiser, Interest_Codes (Interest Codes), List_Codes (List Codes), FAV_COLOR (Favorite Color), and FAV_NUMBER (Favorite Number). The window also has buttons for 'Add', 'Up', 'Down', and 'Remove', and an 'Access keywords' field.

General Lookup Table for Allowance into Activities

- ATSIMPORTER
General Lookup Table
- For activity types enter activity-type code + underscore + Activity – DUES_Activity

The screenshot displays the ATSIMPORTER General Lookup Table interface. At the top, a dropdown menu is set to 'ATSIMPORTER'. Below this is a table with columns 'Code' and 'Description'. The table lists several activity types, including 'DUES_Activity', 'MEETING_Activity', 'Name-Demo', 'Name-Favorite_Things', 'Name-Lists', 'Name-Product_Reviews', 'Name-Test_Results', and 'ORDER_Activity'. A blue arrow points from the 'DUES_Activity' row to the 'Activity types' form below. The form has buttons for 'New', 'Copy', 'Edit', and 'Delete'. A dropdown menu for 'Product Types' is open, showing a list of options including 'DONORCLUB', 'EMAIL', 'EX-ISR', 'EX-PRO', 'EX-RES', 'EXPO', 'FORGOTFND', 'GIFT', 'JOB_POST', 'LETTER', 'MEETFUNC', 'MEETING', 'MEMBERSHIP', 'WESC', 'ORDER', 'PLEGGE', 'PNM', 'PROMOTION', and 'REFUND'. The 'DUES' option is selected. The form fields include: 'Type' (DUES), 'Description' (Dues Payments), 'Prompts' (Subtype, Note, Eff. Date, Source, Task Date, CBU Type/Category), and a grid of 'UF' (User Field) entries (UF_1 through UF_7). Other fields include 'Profile Position' (2), 'Retain (months)' (36), 'Other Code', and 'Keywords'.

Prepare Your Spreadsheet

- First row contains column headers – don't have to match iMIS field names
- Required fields for Individuals
 - First Name
 - Last Name
 - Member Type
 - Status

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	FIRST_NAME	LAST_NAME	MEMBER_TYPE	STATUS	COMPANY	CO_MEMBER_TYPE	CO_STATUS	COPREFMAIL	COPREFBILL	COPREFSHIP	1ADDR_1	1ADDR_2	1ADDR_3	1CITY	1STATE	1ZIP	1PI
2	Bob	Billington	M	A	Billington Manufacturing	CM	A	1	1		1 1428 NW 23rd Ave.			Casper	WY	89112	
3	Laura	Smithen	M	A	AMC Management	CM	A	1	1		1 6455 S. Corporate Dr.			Aurora	IL	33212	
4	Paul	Williams	M	A	XYZ Association	CM	A	1	1		1 2133 S. Parker Rd., #1125			Denver	CA	80209	
5	William	Bluerton	M	A	A New Solution Company	CM	A	1	1		1 987 S. Cleveland St., #200			Indianapolis	IN	42367	
6	Edward	Norman	M	A	Norman's Processing	CM	A	1	1		1 1000 S. Broadway, #4000			Los Angeles	CA	90345	
7	Gail	Balcom	M	A	DPI Specialties	CM	A	1	1		1 P.O. Box 1111			Newark	NJ	07107-2564	
8	Randy	Richter	M	A	ATS	CM	A	1	1		1 7375 w 52ND Ave			Arvada	CO	80002	
9																	

Prepare Your Spreadsheet

- First row contains column headers – don't have to match iMIS field names
- Required fields for Companies
 - Company Name
 - Member Type
 - Status

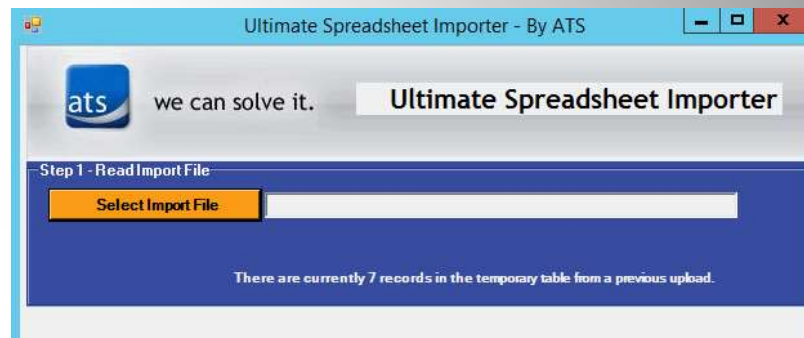
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	FIRST_NAME	LAST_NAME	MEMBER_TYPE	STATUS	COMPANY	CO_MEMBER_TYPE	CO_STATUS	COPREFMAIL	COPREFBILL	COPREFSHIP	1ADDR_1	1ADDR_2	1ADDR_3	1CITY	1STATE	1ZIP	1PI
2	Bob	Billington	M	A	Billington Manufacturing	CM	A	1	1		1 1428 NW 23rd Ave.			Casper	WY	89112	
3	Laura	Smithen	M	A	AMC Management	CM	A	1	1		1 6455 S. Corporate Dr.			Aurora	IL	33212	
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7	Gail	Balcom	M	A	DPI Specialties	CM	A	1	1		1 P.O. Box 1111			Newark	NJ	07107-2564	
8	Randy	Richter	M	A	ATS	CM	A	1	1		1 7375 w 52ND Ave			Arvada	CO	80002	
9																	

Prepare Your Spreadsheet

- Rows that contain required fields for individuals and companies will create individual and company records and link the individual(s) to the company by Company ID.
- If you have iMIS ID's in your spreadsheet but if it does that row will be matched to corresponding iMIS ID.

Import a File

- Select File
 - Pro Tip: Don't have the file open in Excel
- Match Fields
- Select Worksheet

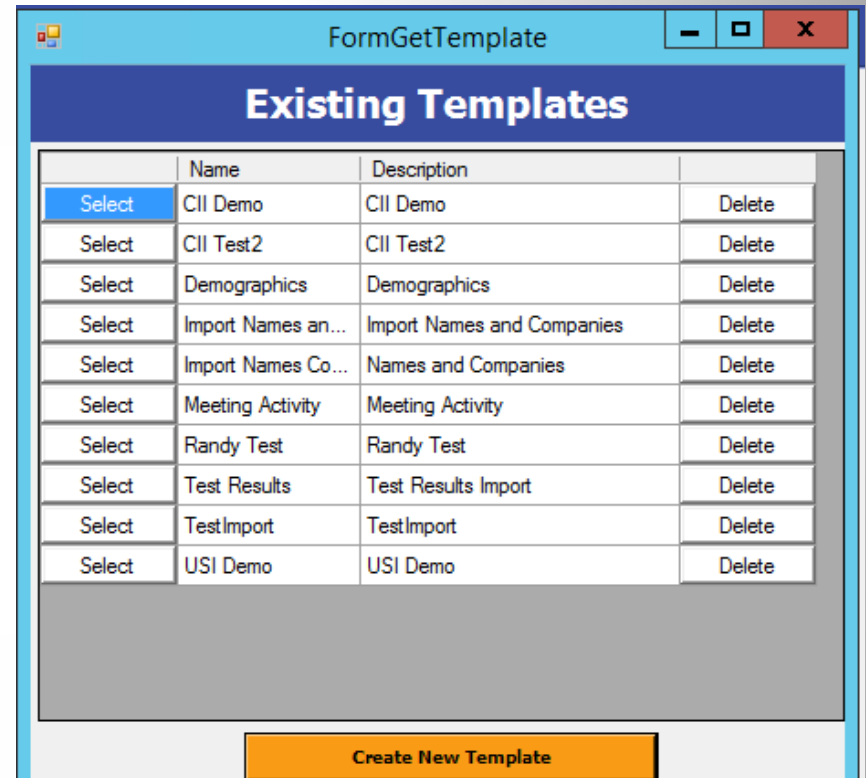


Logout



Templates

- Select an existing field-mapping template or create a new one
- Save templates for imports that always have the same format



Mapping

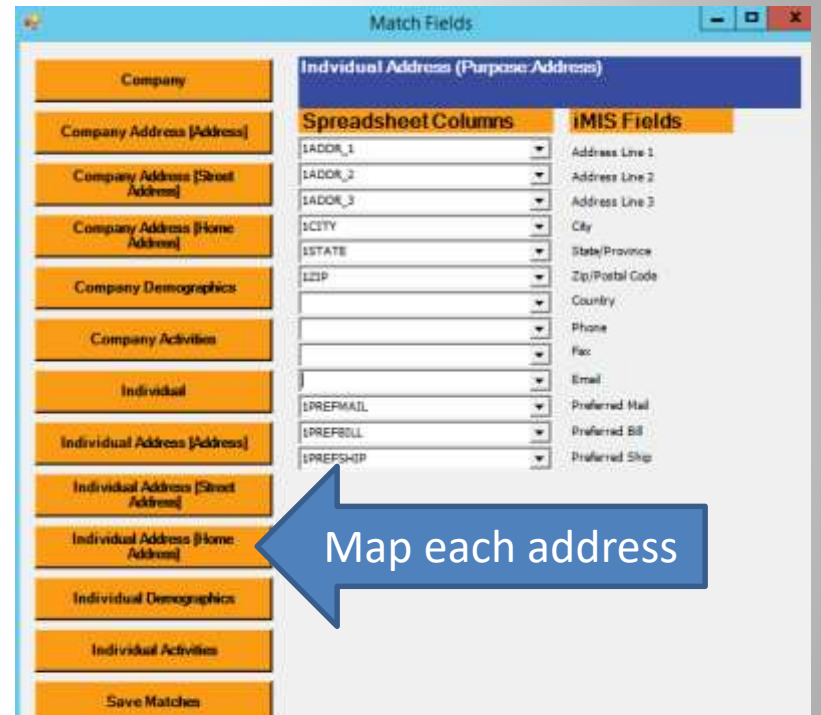
- Field mapping is extensive!
 - Name fields
 - All addresses
 - Demographics
 - Activities
- Go through each button to map each field in your spreadsheet that you want to import.
- Dropdown displays column headers from your spreadsheet

The screenshot shows the 'Match Fields' window for 'Company Information'. The window title is 'Match Fields'. Below the title bar, there are two columns: 'Spreadsheet Columns' and 'iMIS Fields'. The 'Spreadsheet Columns' column has a dropdown menu currently showing 'CONTRANT'. The 'iMIS Fields' column lists various fields: Company iMIS ID, Company Member Type*, Company Category, Company Status*, Prefix, First Name, Informal, Middle Name, Last Name, Suffix, Designation, Title, Company, Home Phone, Work Phone, Toll Free Phone, Fax, Email, Website, and Chapter. A blue header bar at the top of the window contains the text: '* To add companies to iMIS you need to provide a Member Type and Status'.

The screenshot shows the 'Match Fields' window for 'Individual Information'. The window title is 'Match Fields'. Below the title bar, there are two columns: 'Spreadsheet Columns' and 'iMIS Fields'. The 'Spreadsheet Columns' column has a dropdown menu currently showing 'FIRST_NAME'. The 'iMIS Fields' column lists various fields: Individual iMIS ID, Individual Member Type*, Individual Category, Individual Status*, Prefix, First Name*, Informal, Middle Name, and Chapter. A blue header bar at the top of the window contains the text: '* To add people to iMIS you need to provide a Member Type, Status, First, and Last name.'.

Mapping, Cont'd

- You can import multiple addresses for your contacts and identify each preferred address (mail, bill, ship)
- Include 1 to indicate preferred in your spreadsheet



K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
1ADDR_1	1ADDR_2	1ADDR_3	1CITY	1STATE	1ZIP	1PREFMAIL	1PREFBILL	1PREFSHIP	2ADDR_1	2ADDR_2	2ADDR_3	2CITY	2STATE	2ZIP	2PREFMAIL	2PREFBILL	2PREFSHIP
1428 NW 23rd Ave.			Casper	WY	89112	1	1	0	4 S. Maple St.			Casper	WY	89112	0	0	1
6455 S. Corporate Dr.			Aurora	IL	33211	1	0	1	43 Wall Circle			Aurora	IL	33547	0	1	0
2133 S. Parker Rd., #1125			Denver	CA	80209	1	1	1	1027 S. University Blvd.			Denver	CO	80210	0	0	0
987 S. Cleveland St., #200			Indianapolis	IN	4236	1	1	1	334 S. Bayside Dr.			Indianapo	IN	42563	0	0	0

Mapping, Cont'd

- Map Activities
 - As you select each activity type only the fields activated display for mapping
- Map Demographics

The screenshot shows the 'Individual Activities' mapping interface. It features a blue header with the title 'Individual Activities'. Below the header, there are two tabs: 'Spreadsheet Columns' and 'iMIS Fields'. Under the 'iMIS Fields' tab, there are three buttons: 'DUES', 'MEETING', and 'ORDER'. Below these buttons, there are six dropdown menus, each corresponding to a field name on the right: 'Type', 'Transaction Date', 'Begin Date', 'Thru', 'Source', and 'Amount'.

The screenshot shows the 'Individual Demographics' mapping interface. It features a blue header with the title 'Individual Demographics'. Below the header, there are two tabs: 'Spreadsheet Columns' and 'iMIS Fields'. Under the 'iMIS Fields' tab, there are four buttons: 'Name-Product_Reviews', 'Name-Test_Results', 'Name-Lists', and 'Name-Fav'. Below these buttons, there are five dropdown menus, each corresponding to a field name on the right: 'PRODUCT_CODE', 'RANK', 'TITLE', 'DESCRIPTION', and 'REVIEW_DATE'.

Processing

- Read File
- Validate Records
- Match Names
- Review
 - Companies
 - People
- Pro Tip: If linking people to companies, import companies first

The screenshot displays the 'Ultimate Spreadsheet Importer' software interface. The window title is 'Ultimate Spreadsheet Importer - By ATS'. The interface is divided into five steps:

- Step 1 - Read Import File:** Includes a 'Select Import File' button with a file path 'C:\Users\Ttidquist\Desktop\USI Demo Sheets\Demo_NamesCor', a 'Match Fields' button, and a 'Read File' button. A progress bar shows 'Finished reading 7 detail records.'
- Step 2 - Validate Records:** Includes a 'Validate Records' button and the text 'Data validation complete'.
- Step 3 - Match Records:** Includes a 'Match Names' button. Summary statistics show: 'Names Matched: 4', 'Names Unmatched: 3', 'Organizations Matched: 4', and 'Organizations Unmatched: 3'. The status is 'Matching Finished'.
- Step 4 - Review Companies:** Includes 'Review Companies to Add' and 'Review Company Matches' buttons.
- Step 5 - Review People:** Includes 'Review People to Add' and 'Review People Matches' buttons.

A 'Logout' button is located at the bottom right. The version and database information 'v1.0.0.55 Current Database: EA202Demo' is shown at the bottom left.

Review Matches

- Companies
- Review Adds and Matched
- Select companies to import
- Upload
- Repeat process for People

Company Records to Add

Put a checkmark in the Upload column by the records that you would like to add into iMIS, then press the UPLOAD button.

Companies that are not in iMIS					
	COMPANY	CITY	STATE	UPLOAD	NOTE
▶	Jones Inc.	Seattle	WA	<input type="checkbox"/>	
	Walt Disney	Orlando	FL	<input type="checkbox"/>	
	Williams, Inc.	Denver	CO	<input type="checkbox"/>	

Matched Company Records

Put a checkmark in the Synchronize column by the records that you would like to synchronize fields into iMIS, then press one of the buttons below.

Companies that are in iMIS						
	iMIS_ID	COMPANY	CITY	STATE	NOTE	SYNCHRONI
▶	201	Ford Movies	Hollywood	CA		<input type="checkbox"/>
	202	Funny Flicks	Phoenix	AZ		<input type="checkbox"/>
	101	Prodigy Make	Newark	NJ		<input type="checkbox"/>
	205	Tracks R Us	New York	NY		<input type="checkbox"/>


Synch Company, Add Activities, Fill in Blank Single Instance Demographics | Add Multi-Instance Demographics Only

Synch Company, Add Activities, Overwrite Single Instance Demographics | Add Activities Only

Close | Export to CSV | Check All | Uncheck All

Individual Record

Gail Holter
MDL Specialties



Member type Individual Member
Status Active

[Print Info](#) [Public Profile](#) [Email](#) [Merge](#)
[Donate](#) [Order](#) [Register](#)

Membership is not due for renewal at this time.
[Renew Now](#)

Primary email is missing
Mobile phone is missing

My Support Requests

Date	Status	Subject	IsEmergency	Phone	Email	Details	IsAMember
There are no records.							

[About](#) [Participation](#) [History](#) [Donor Data](#) [Demographics](#) [Preferences](#)

Engagement Metrics

This chart displays a count of engagement activities for this contact.

- Event registrations and commerce orders include only those items that are paid in full.
- Gifts are individual donations and do not include pledges.
- Committee counts are the total active memberships in any committee.

Use this information when you talk with our constituents to encourage them to take advantage of their benefits.


Membership

IMIS ID	60447	Major key	
Member type	Individual Member	Status	Active
Billing category		Paid through	
Chapter		Member since	
Renewed		Last update	6/1/2017 2:24 PM
Last updated by	MANAGER	Date added	6/1/2017

Addresses

Company Record

MDI Specialties



Member type Company Member

Status Active

[Print Info](#) [Public Profile](#) [Email](#)


[Donate](#) [Order](#)

Membership is not due for renewal at this time.

[Renew Now](#)

[About](#) [Contacts](#) [Participation](#) [History](#) [Preferences](#)

Engagement score



0

Other Import Options

- Sync Contact, Add Activities, Fill in **Blank** Single Instance Demographics
- Sync Contact, Add Activities, **Overwrite** Single Instance Demographics
- Add Multi-Instance Demographics Only
- Add Activities Only
- Export to CSV



Questions & Answers



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Moderator:

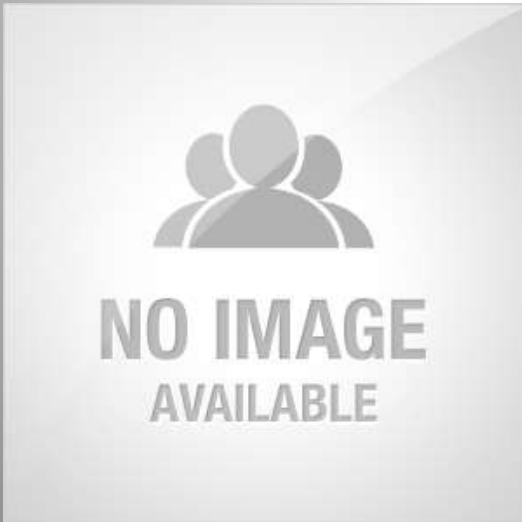
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