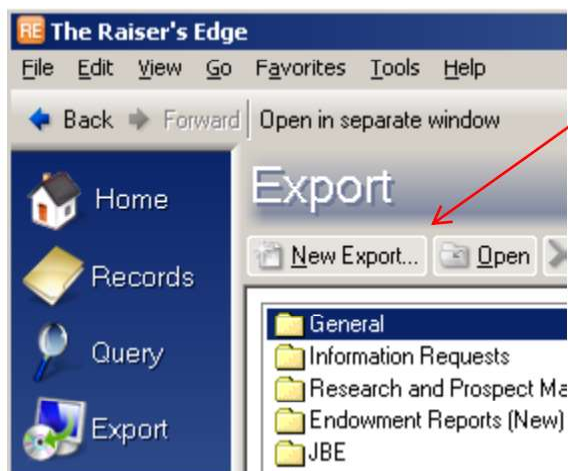


Along with creating the exact import files needed to upload Constituent and Gift records into the Raiser's Edge, EasyREimport uses a copy of your Raiser's Edge database to find possible matches to avoid creating constituent duplicate records.

To create the Export of data that EasyREimport will use for constituent matching follow these steps.

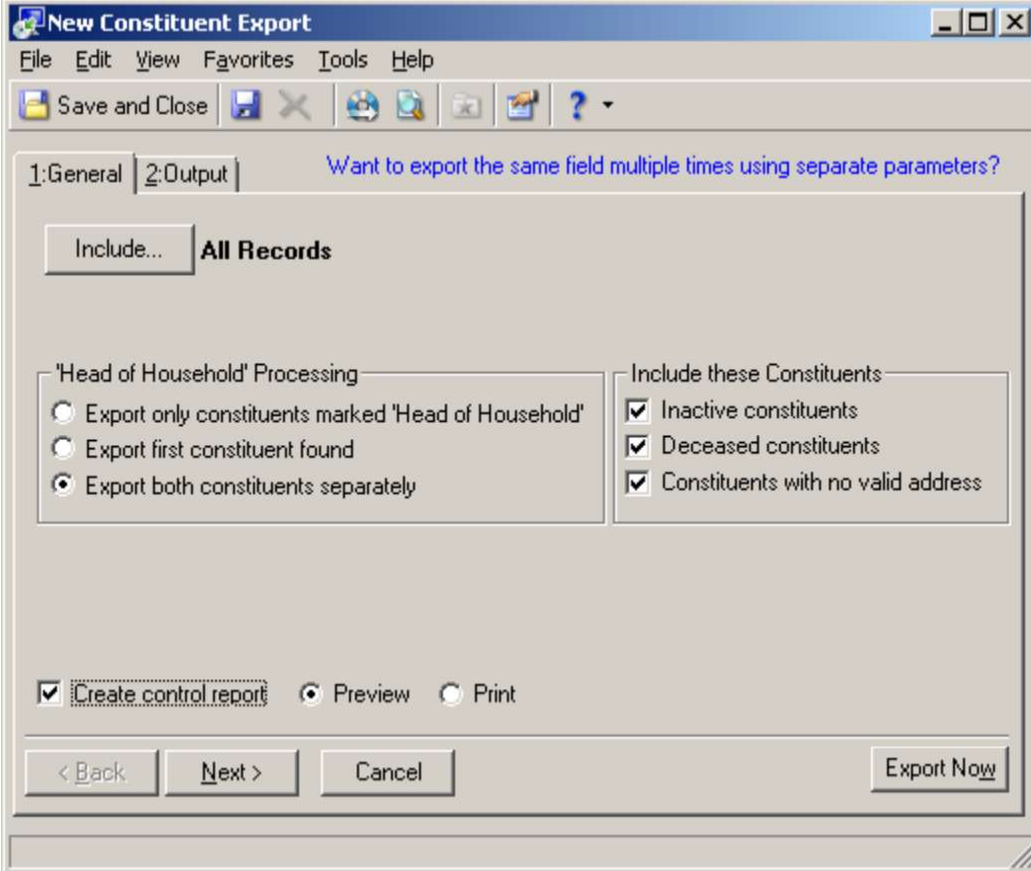
To begin go to Export and choose New Export



1. Then choose a Constituent type and Comma-Separated Values for the Export format:



2. You don't need a query since we are exporting all the records in your Raiser's Edge database.* You can check the box to create a control report as it will tell you what you named the file and where you placed it.



New Constituent Export

File Edit View Favorites Tools Help

Save and Close

1:General 2:Output [Want to export the same field multiple times using separate parameters?](#)

Include... All Records

'Head of Household' Processing

- Export only constituents marked 'Head of Household'
- Export first constituent found
- Export both constituents separately

Include these Constituents

- Inactive constituents
- Deceased constituents
- Constituents with no valid address

Create control report Preview Print

< Back Next > Cancel Export Now

* Note that if you want to only export a specific group of records that is also an option but we recommend checking the entire database for duplicates.

3. Choose the following fields in this **exact order (Image of completed export on next page)**:

+Constituent Information Section:

Constituent ID
Import ID
Organization Name
First Name
Middle Name
Last Name

+Address

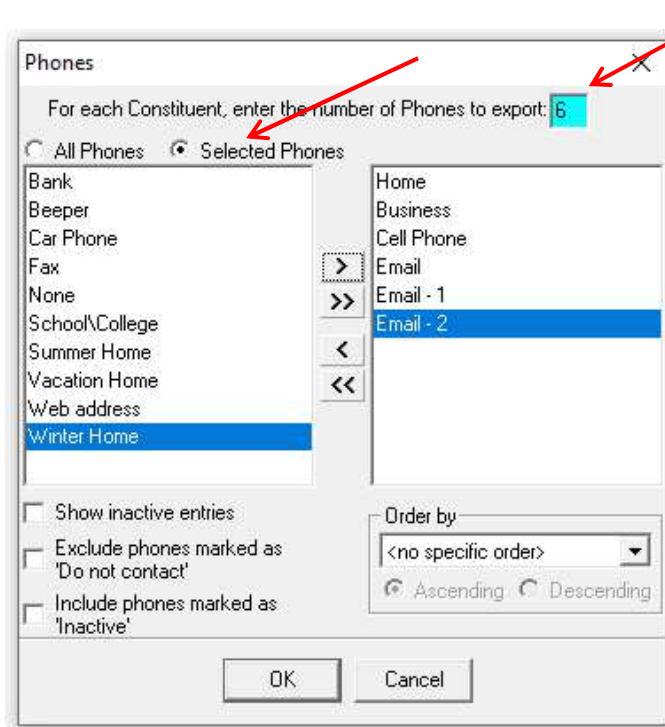
+Preferred Address
Address Line 1
City
State
Zip

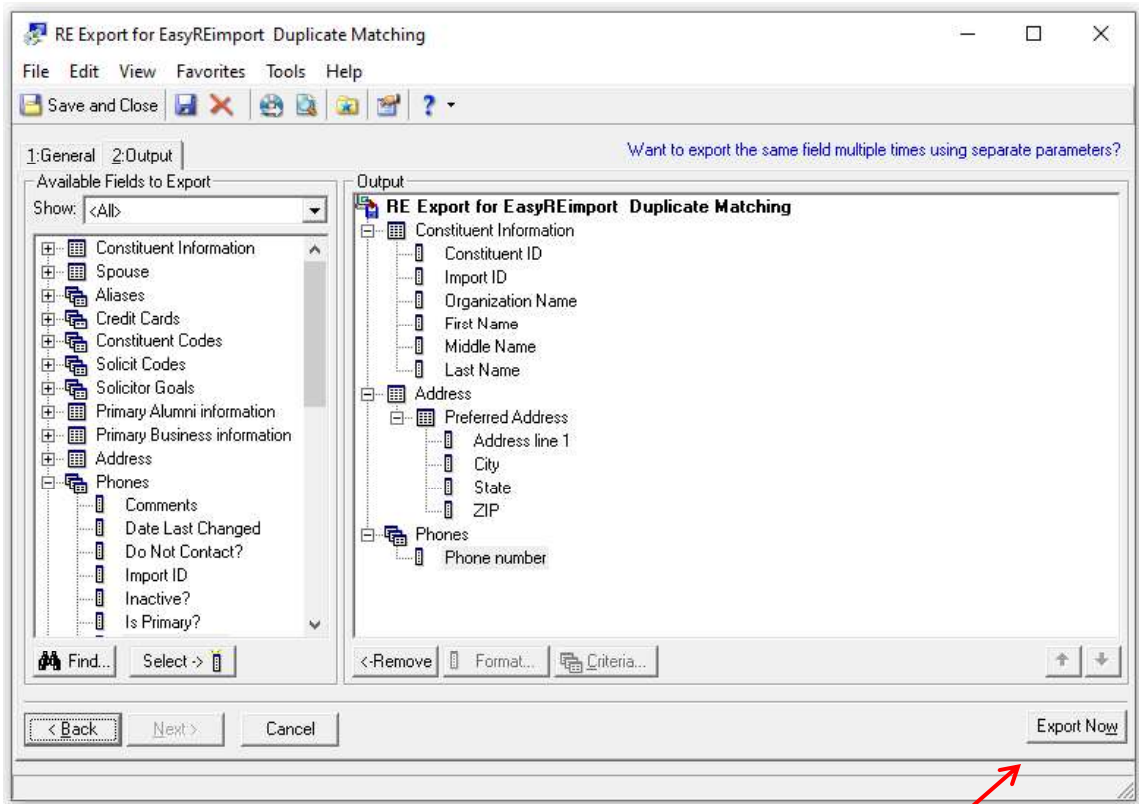
+Phones

+Phone Number

When you choose the phone number field you then need to choose 6. Then choose any 6 phone types that you would like to match against your incoming data file.

Note that you can choose any 6 phone types for matching, the order and types do not matter. Any combination of emails and phones can be used.





4. The last step is to Export the file and save it to your computer

Once you have exported the file place it in a folder along with the data you need to import. Make sure that both files are saved as Comma Separated Values or .CSV files.

You will ultimately enter this RE Export as the existing RE Constituent File as seen below:

Enter the path to existing RE Constituent File:

Enter the path to the source data file:

Enter the output directory where you want to create the import files

If you have additional questions contact us at support@easyreimport.com or visit us at <http://www.easyreimport.com>