

## DonorImport 1.1 installation

For technical help, contact Dan at [donorimport.com](https://donorimport.com).

### 1. Set up Dropbox on your computer.

#### a. Open a Dropbox account.

Dropbox is a cloud storage service. It is free with 2 GB of space, you won't use much space (the sync files are very small).

Here is my referral link:

[https://www.dropbox.com/referrals/AAC\\_sHsZ5zMkKkljKUEcWKcZgzD70ZoH4ng?src=global9](https://www.dropbox.com/referrals/AAC_sHsZ5zMkKkljKUEcWKcZgzD70ZoH4ng?src=global9)

#### b. Install the Dropbox desktop app.

Download the desktop app after you've finished creating an account above. Installing will create a Dropbox folder in your computer's User folder (My hard drive > Users > My username > Dropbox).

Here is a quick link:

<https://dropbox.com/downloading>

#### c. Accept the "shared folder" request in your email today.

You will receive a shared folder request from our administrator. Accepting the share will place a custom folder in your computer's Dropbox, named with your **AG account number**. Just check the Mac Finder or Windows Explorer to see it. This folder is used by DonorImport to sync the files that are downloaded from the AGUSM portal. (After they are processed the files are deleted, so normally this folder will be empty.)

### 2. Set up your DonorImport account.

The DonorImport account is a simple web-based viewer for the donations that have synced through your Dropbox. These donations are *automatically* made available to your support database (Partner Essentials, DonorElf, TntConnect), once your database has the login information for your DonorImport account. (Normally it isn't necessary to use this website directly, unless you use the 12-Month viewer on the Donations tab, or plan to manually download the sync files).

#### a. You will receive an email with your DonorImport account info today.

Click the link in the email to set your new password. Keep this login info in order to use with your support database. And for the future, you can log into your DonorImport account at any time via our website. Just click on the **Account menu** at:

<https://donorimport.com>.

**b. Connect your support database to your DonorImport account.**

If you already use Partner Essentials, DonorElf, or TntConnect, just click in the menu to connect it to your DonorImport account. This will enable syncing to begin.

**c. Please read specific setup instructions for your database at the end of this email.**

Brief instructions are provided for Partner Essentials, DonorElf, and TntConnect.

**3. Install the browser extension for Google Chrome or Microsoft Edge.**

*Note: The extension will download today's AGUSM donation file once it is installed.*

*Therefore, don't install the extension until you are ready!*

The Extension is available for Google Chrome or Microsoft Edge.

**a. In the Chrome or Edge browser, set up a new User Profile.**

Find the Profile icon or menu. Click to set up a new profile. Each “profile” in your browser has its own settings, including default startup page, downloads folder, and browser extensions. Name your new profile “DonorImport” and don’t connect the profile to any Google or Microsoft account; just leave it blank.

**b. Change the Startup page and Downloads folder.**

With your custom User Profile open, open the Settings or Preferences menu. Find the “Startup” or “Home page” section and set the default starting page as “[missionsportal.ag.org](https://missionsportal.ag.org)”. This page will open whenever the browser is launched. Then find the “Downloads” section and set the default Downloads location as the shared Dropbox folder (the one you accepted earlier from DonorImport, which is named with your **AG account number**).

**c. Download the DonorImport Extension from the Web Store.**

Using your custom User Profile (don’t use your normal browser window), go to the downloads page to install the extension. Here is the Store link:

<https://donorimport.com/downloads>

**d. For later: Questions.**

How does it work? The DonorImport Extension runs automatically on your custom User Profile when it is open to the portal page. Normally it downloads your donation files once a day, trying every 5 minutes until it succeeds. It won’t consume any significant resources. Just set and forget — keep it minimized in your dock.

What if it doesn’t work? No worries—there is a fallback if the extension is ever broken or if the AG missions portal changes: you can always manually download the .XLS donation files from the portal and place them in your shared Dropbox folder whenever you want to sync them.

**e. For later: Choose your extension settings**

At this point, there's nothing more you must do. Just leave the custom profile open to the portal at [missionsportal.ag.org](https://missionsportal.ag.org) (any page), and you’re set!

There are several options which you will find useful. Click the **Settings+** menu on the AGUSM Portal page ([missionsportal.ag.org](https://missionsportal.ag.org)) in your custom User Profile. (If you don’t see the Settings+ button, then the extension is either not installed, or you aren’t using your custom User Profile.)

Adjust the "download mode" depending on your preference:

- a. You can have it automatically download the new donation file every day (if you open the custom profile regularly).
- b. Or you can have it download all five recent donation files, in which case you should open the custom profile only at the end of the cycle. Open it a day or two after your paycheck arrives, which is when the last donation file of the month is available. Usually that's between the 4th and 12th of the month.
- c. Or you can turn off automatic downloads.  
If you turn off automatic downloads, just click the "Catch Me Up" task in the Settings menu occasionally. This task will allow you to download the final donation file of the month, for any number of past months. For example, you could get your support database caught up on donations for the past year, in just a couple clicks. Or you could do this every month for the previous month's donations. The extension will automatically know which files to download.

#### 4. Connect your support database for syncing

See instructions for your specific database on the pages below

#### FINAL NOTE:

You need to avoid syncing from two sources for any given month in your database, otherwise there will be duplicate donations! (This would take a lot of work to fix.)

**#1** If you have been syncing files during the current or past month, install the DonorImport Extension in your browser only AFTER the daily file for a new month is available on the AG Missions Portal. By default, the DonorImport Extension automatically downloads the most recent file from the Portal. Therefore you need to wait until at least the 5th of the month, or anytime after your paycheck clears, to install the browser extension.

**#2** Complete *any partially-synced months in your database* by your previous sync methods.

However, if you have several unsynced months in a row, including the current month, then it might be possible to avoid syncing these months by your previous methods and instead use the "Catch me up" feature (found in the DonorImport Settings menu) to sync those months automatically — please email me if this is the case.

Finally, if you've already synced a few donations for this new month by your previous method, but don't mind deleting those donations from your database, that's fine. Just delete them and then start syncing with DonorImport.

## Partner Essentials -----

Go to <https://partneressentials.work>

\* As always, never import donations from two different sources for any given month; this will create duplicates.

### NEW USERS

We will create a new account for you in Partner Essentials. You will receive an email with your new account info.

Once you have logged into your account, please check

#### **=> If you have NO MPDx data:**

To starting syncing gifts into PartnerEssentials, go to Settings (the gear icon) > Connect Services > Organization. Click to add an organization account. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport - Pacific NW Chi Alpha". It will ask for your DonorImport account info, and then it will start syncing.

#### **=> But if you have prior MPDx data:**

First export your data from MPDx:

- Go to <https://mpdx.org> and log in.
- Go to Settings (the gear icon) > Preferences. The bottom dropdown menu option is "Export all data."
- Click the button to "Export all data." This will download an .XML file to your computer.

Then import your data from MPDx:

- In Partner Essentials, go to Tools > Import from MPDx. Select the .XML file that you downloaded from MPDx.
- Wait a few minutes until all the data has loaded into Partner Essentials.
- Take note of the last month that has complete data. Be sure that your incoming NEW DonorImport data does not overlap with the existing months that came from MPDx.

To starting syncing NEW gifts into PartnerEssentials, your organization may already be syncing with DonorImport. But to make sure, go to Settings (the gear icon) > Connect Services > Organization. Click to add an organization account. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport - Pacific NW Chi Alpha". It will ask for your DonorImport account info, and then it will start syncing.

### EXISTING USERS

If you already have a Partner Essentials account, you will be converting from an Individual (DIY) plan to an Organization plan.

**1. Let me know you are ready to stop your Individual billing.** Please remind me at [support@donorimport.com](mailto:support@donorimport.com). I will make the change. Your new billing will only come from DonorImport from now on.

**2. Set up syncing with the DonorImport org.** In Partner Essentials, go to Settings (the gear icon) > Connect Services > Organization. Click to add an organization account. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport - Pacific NW Chi Alpha". It will ask for your DonorImport account info, and then it will start syncing.

**3. Now merge your two donation accounts.** Go to Settings (the gear icon) > Manage Accounts > Merge your accounts. You will see two "accounts" listed — then first is your old DIY donation stream which was being manually uploaded, the second is your new DonorImport (PNW XA) donation stream which is being synced automatically. Click to merge these two accounts together. Now all of your past and future information is combined in the Partner Essentials app. (If you don't do this, you'll have two separate views in Partner Essentials).

**IMPORTANT: This process will create a duplicate contact for all existing donors. Unfortunately, you will need to individually merge these duplicates together — there is no way around this. It will take about 15 minutes to do this. To merge contacts:**

1. Click on the Tools menu > Merge Contacts.
2. You'll be able to select the old and new contacts that it find, and merge them with a single click.

## DonorElf -----

Go to <https://donorelf.com>

\* As always, never import donations from two different sources for any given month; this will create duplicates.

### NEW USERS

When you set up an account, select "DonorImport (Pacific NW Chi Alpha)" as the organization. Do not one of the other "Chi Alpha" options. Picking this organization will also give you the \$9.95/month rate and enable syncing.

DonorElf will ask you for your DonorImport account info, and then it will start syncing.

However, if it doesn't ask or if you miss the alert, to starting syncing gifts into DonorElf just click the Menu button > Import > from DonorHub. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport - Pacific NW Chi Alpha". It will ask for your DonorImport account info, and then it will start syncing.

### EXISTING USERS

You can retain your current account, including all of its donations. However, your method for uploading gifts can now be updated.

To starting syncing gifts into DonorElf via DonorImport, click the Menu button > Import > from DonorHub. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport - Pacific NW Chi Alpha". It will ask for your DonorImport account info, and then it will start syncing.

**IMPORTANT: This process will create a duplicate contact for all existing donors. Unfortunately, you will need to individually merge these duplicates together — there is no way around this. It will take about 30 minutes to do this. To merge contacts:**

1. Click on a contact.
2. Then click Actions > Merge.
3. Select the duplicate contact to merge (search by last name).

## TntConnect -----

Go to <https://www.tntware.com/tntconnect>

TntConnect will run on Windows. It also runs on MacOS using a Windows emulator called Wine.

To download gifts into TntConnect, click the Gift Input button. It will give you a list of organizations that use the **DonorHub** system. Select the organization named "DonorImport (Pacific NW Chi Alpha)". It will ask you for your DonorImport account info, and then it will start syncing.

I don't know if this will create duplicate contacts for existing users. Be sure to search your database by last name to check if duplicates were created for existing contacts after your first sync. You'll need to use the Merge Contacts function, if so.

## Using DonorImport on its own -----

Go to <https://donorimport.com> and click the **Account** menu.

Some users might find this account viewer helpful, even without a separate database!

=> 12-MONTH VIEW

The 12-month view is an important feature (also available in all the databases above). Click Donations > "Switch to Monthly View" to see all your donors for the past 12 months.

=> PARTNER ESSENTIALS "DIY" USERS

You can download donation sync files, if you are using Partner Essentials manually and want to remain on the Individual plan. Click on Donations menu > scroll to the bottom and click on "Partner Essentials DIY".

NOTE: Do not click "Download into Other Support Raising CRMs", which is a link on the Dashboard. This does NOT allow you to download a 1-month data sync file. It only allows for 90 days or all cumulative donations. Only click on the PE data sync file at the bottom of the Donations page.