

Data Importing and Exporting

Accurate, up to date data that your organization can use in the pursuit of more effective fundraising: That's the end result of ClearView CRM's powerful data import and export capabilities.

ClearView CRM imports data like gifts and payments made, address changes and membership status from gift processing, online fundraising and other sources. It exports your information in the form of accurate, relevant mailing lists for direct mail services, meaningful reports and other uses. The system can generate and export highly targeted lists based on any combination of donor criteria.

ClearView CRM's standard import and export capabilities include functions like gift imports, payment acknowledgments and pledge billing, and ETL (extract/transform/load) functions like National Change of Address (NCOA) processing, prospect research, accounting updates and Coding Accuracy Support System (CASS) certification.

Data importing and exporting in ClearView CRM let your organization:

- Easily import gifts that a caging service has processed
- Import new donor and gift information from online contributions
- Create mailing lists and other exports in industry-standard formats
- Keep financial ledgers current with accounting imports
- Keep addresses current and accurate
- Ensure data integrity by pre-processing and standardizing import files
- Use standard mailing exports for acknowledgment, pledge reminders and general mailings
- Use a general import tool for donor information, gifts, event registrations, memberships and other transactions

Related ClearView CRM Tools

- Direct Mail Marketing
- Prospect Research
- Reporting and Analytics

For more information, contact SofTrek at 800.442.9211 or sbirnbaum@softrek.com.