

Helpful Village Import guidelines

Version 2.0

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Prepared by
Manuel Acevedo
Helpful Village

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1: Overview

This is a **one-time*** import intended to import data from a previous platform/system into HV. This document is intended to provide guidelines to help you understand the import file CSV format that Helpful Village has sent you for the **ESTABLISHED PACKAGE**.

If you already had a spreadsheet file with your contact information, you can replace the name of each column with the names we sent you. **Note that the order of the columns is not important, only the name of the column will be used for the import.**

2: Email Field

The **email** field is the most important column, because it is used as a unique identifier, which allows us to send emails and is also used by members and volunteers to login. Some people may not have an email address, but whenever possible it is important to have one. If the person doesn't have an email (or shares an email with another person. In this case, please give the real email to the 'primary' member of the household and give a dummy email to the secondary member) we invite you to use a dummy email following the following convention: firstname.lastname@noemail.com

3: Relationships

Many of the columns are self-explanatory. After [date_of_birth](#), we have:

[related_user_relationship_name](#) [related_user_email](#)

These two columns can be used to enter family relationships between users (in the example provided we say that Manuel is Claire's spouse and also in the other sense). (you can leave them blank too).

4: Groups

Then we have:

[volunteer_services](#) [committees](#) [mailing_lists](#) [office_corps](#)

If you enter information in these columns, the import will put these people in these groups. If you leave them blank that is ok as well. We will be able to add each user to each group using the website later.

5: Prospect Info

[prospect_info](#) (optional) You can enter any notes that can be useful to the person trying to convince the prospect to become (member, volunteer, donor).

6: Hub and Spoke Village

[local_village](#) (optional) If your village is hub and spoke here is where you enter the local village of this person.

7: Additional Information

The rest of the columns allow us to import membership information for Established Villages (ex: emergency contact, etc.).

For columns with yes/no or true/false entries, begin the label with “tag__”

For example: tag__is_donor?

For custom columns (columns that are different from the ones requested) begin the label with “custom__”

For example: custom__name_of_household

8: Get Help

If you have any questions about the import file, please let us know:
support@helpfulvillage.com