Importing Auction Data

The following document was created by Patrick Shaw, formerly of NPower Seattle. Thanks Patrick for sharing your work for others to use!

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Disclaimer:

This is a guide, not a one-sized fits all set of instructions. Please work carefully with your Salesforce Administrator to adjust and amend these instructions so that they work for you.

Assumptions:

- You have Salesforce and know how to use it
- You have the latest version of Auctions for Salesforce
- You are up to date with the Nonprofit Starter pack updates
- You are or are working with a Salesforce Administrator for your agency
- You have access to a copy of Microsoft Excel and know how to use these formulae:
    - VLookup
    - Concatenate
    - Trim
- You are familiar with Salesforce nomenclature (Contacts, Households, Organizations, Opportunities, and Campaigns) and how your agency is using those items
- You have and know how to use the Apex Data Loader
- You know how your nonprofit uses Salesforce – naming conventions and so on
- You've reviewed all of the Auctions for Salesforce documentation
- You are in a calm and peaceful state of mind!

Overview:

Importing your auction data into Salesforce is not technically challenging. But it may take a while – you'll have to obtain and understand your auction data, you'll most likely have to clean it up and organize it in a way that Salesforce likes, and you will likely make several passes at import/export rounds to get it all working properly. In general, though – you'll follow these steps:

(Details on each step follow this overview).

1. Prepare your data
2. Create a new Auction in Salesforce, and export that data so you can obtain a Salesforce Campaign ID (There are actually 4 campaigns created per Auction, and you'll want most of them: Auction Donated Items, Auction Attendees, Auction Sponsors, and Auction Tickets).
3. Sync your Auction and Salesforce Contacts. Compare your list of Auction attendees to the Contacts you already have in Salesforce. If needed, import new people, tidy up any household names, and export all of your contacts so that you have a Contact and Organization ID for each person. (You might also want to include the people that did NOT attend – so you know whom you invited).
4. Import the auction items (two options):

    a. Just create the items, or;
    b. Create opportunities for donated items that were given to the auction first and THEN turn those into auction items
5. Prepare your list of Attendees
    a. Assign a table captain to each table (optional)
    b. Assign a bid number to each contact that attended (optional)
    c. Assign each contact a table at which to sit (optional)
6. Import auction bids (two options)
    a. Just the **winning bids (Purchases)**. (We assume you are only tracking the winning bid. You can keep track of the losing bids if you'd like. Those steps are included, but it does mean you will have to prepare a lot of additional data to import.)
    b. **All of the bids**. Those that won, and those that lost
7. Review the data by running reports of who attended (and who didn't), who bid (and who didn't) the totals, and so on.
8. Use the data to plan your next auction!

Preparing Your Data

You should plan on spending a lot of time getting your data ready. This isn't an exhaustive list, but there ARE things you can do in the preparation phase to make the import process much more effective. Here are a few tips:

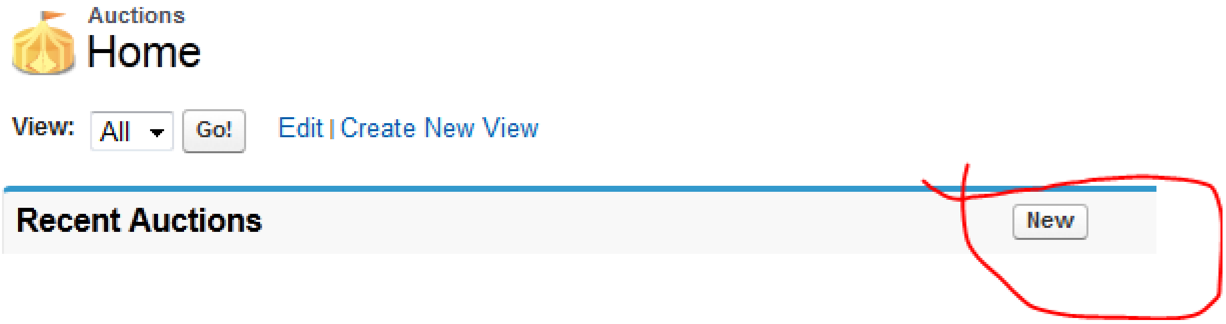
1. You have to import from a CSV file – but it is easier to get your data ready in a regular Excel spreadsheet, and then once it is ready, save it as a CSV file
2. When you enter data, do NOT include a white space at the end –that may get in the way of the import or some of the matching that you'll do
3. Dollar amounts should be entered as a general number, not as currency
4. Dates should be entered using the *3/15/01 date format
5. Organize ALL of your similar data at the same time. See attached spreadsheet for an example.
6. The **TRIM** function takes out extra white spaces!
7. The **CONCATENATE** function lets you join two rows – so you can have a name in one row, and the words "2012 auction" in another, and you can use that function to join them together
8. Excel had a feature called "text to columns" which will split a first and a last name into two different columns
9. Spend a lot of time checking names! Nick might really be Nicholas. John might really be Jon.
10. Test in small increments, and don't keep going until you've checked to make sure that imports or deletions worked as you expected
11. You have an expectation in mind! If you are planning on deleting something, you should know how many records you are starting with, and how many you are deleting, and what you should end up with

Create a New Auction

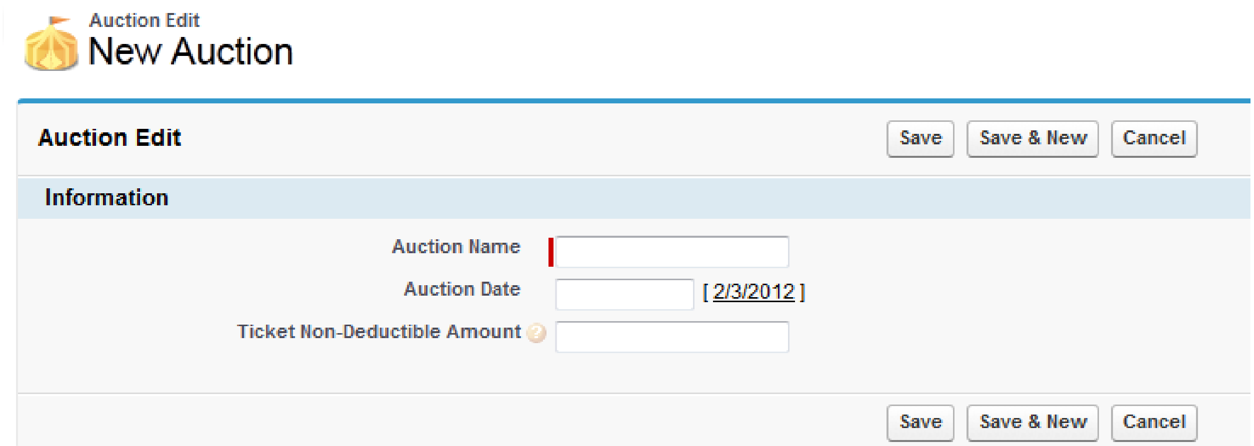
This is the easy part:

1. Head on over to Salesforce, look for the Auctions tab, (talk to your Administrator if you need help finding it) and give it a click:

2. Click the “new” button

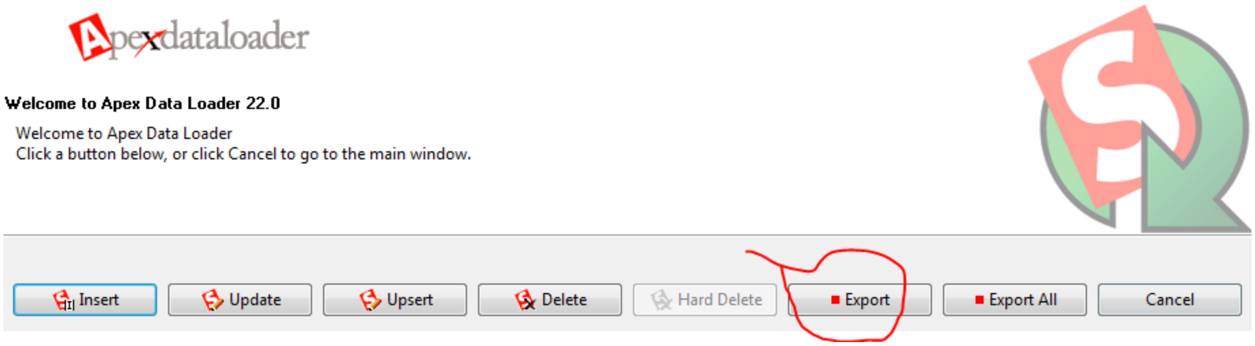


3. Give your auction a name and a date, and specify the ticket amount, if any:

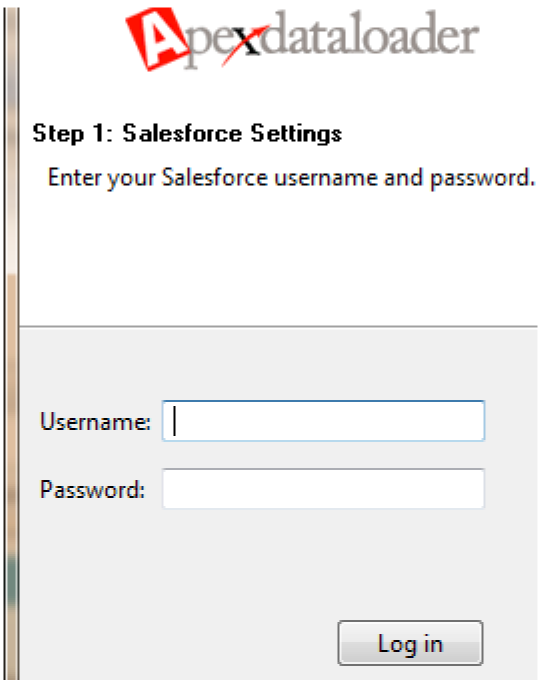


That will create some additional Campaigns for you (Attendees, Tickets, Sponsors, Item Donors).

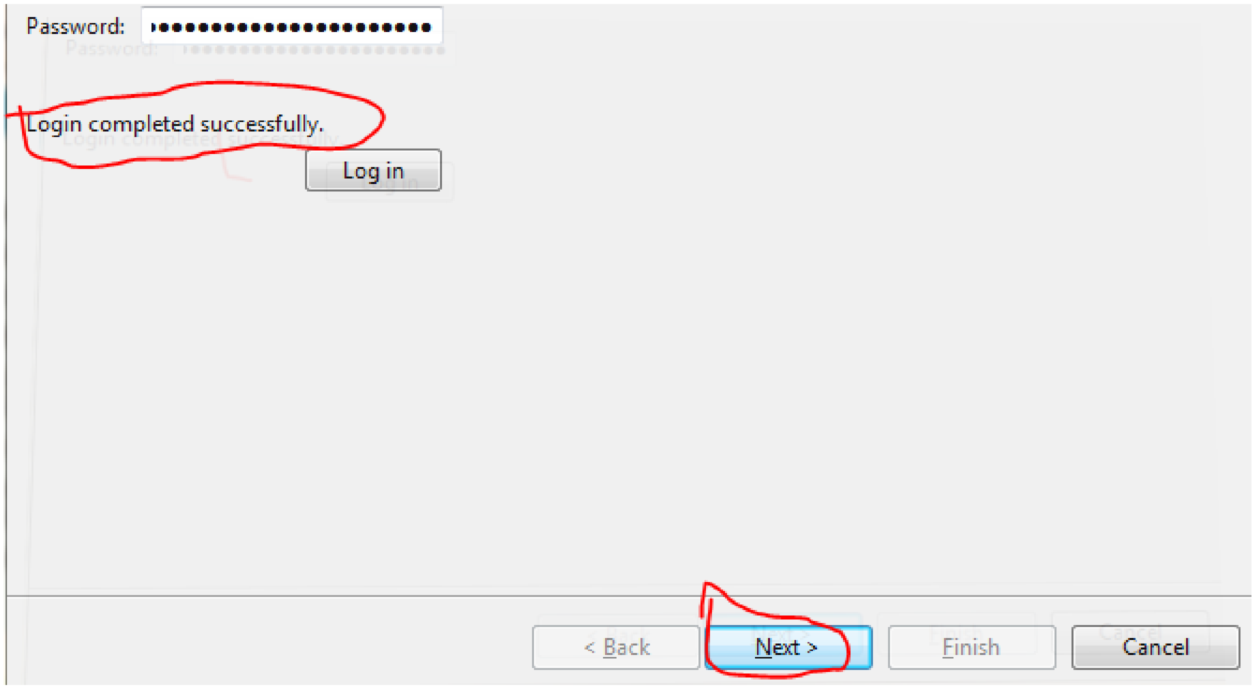
4. Open the Apex Data Loader and select “export”:



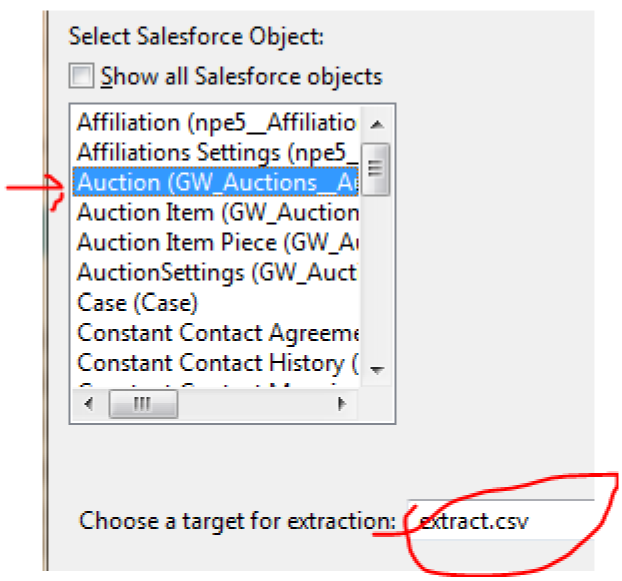
5. Login (remember that you login with your email address for Salesforce, and that when entering your password, you have to append your Salesforce Security Token):



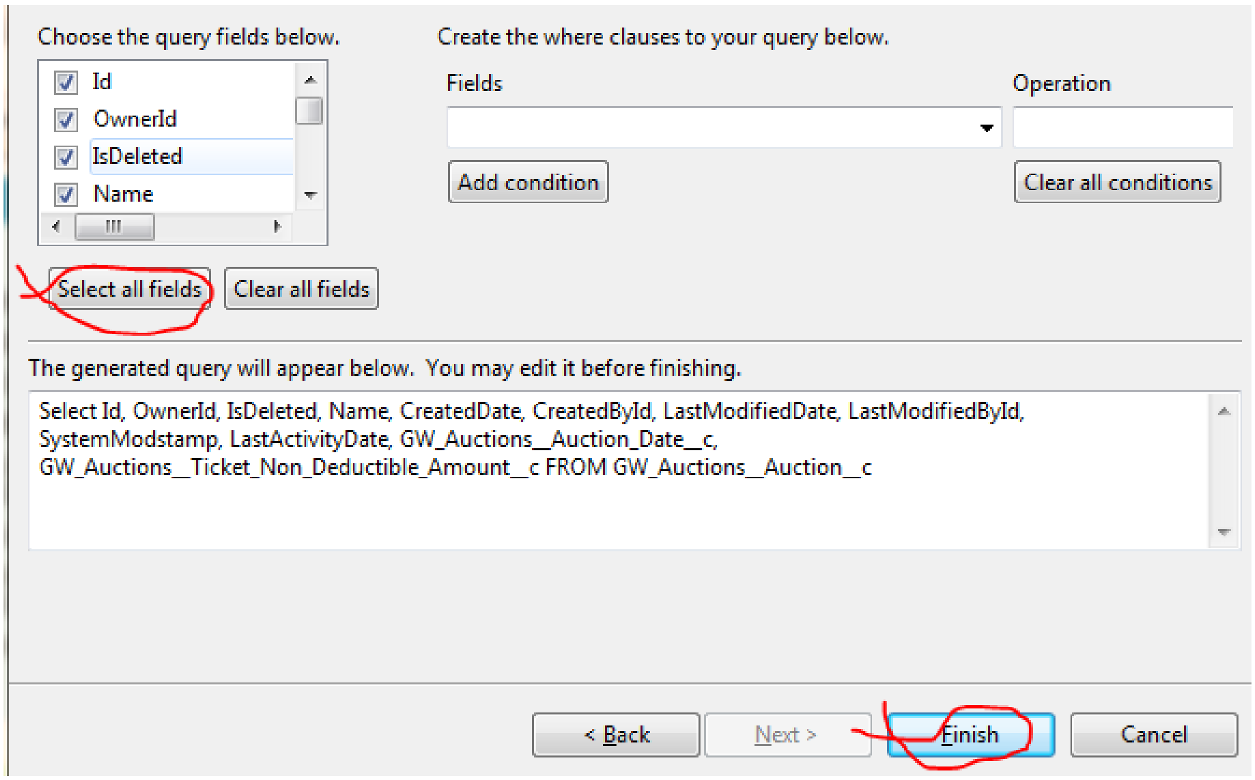
6. Don’t be fooled when you still see the login button – it will tell you if you have logged in or not – if you have, select “next”. If you haven’t re-try your user name and password.



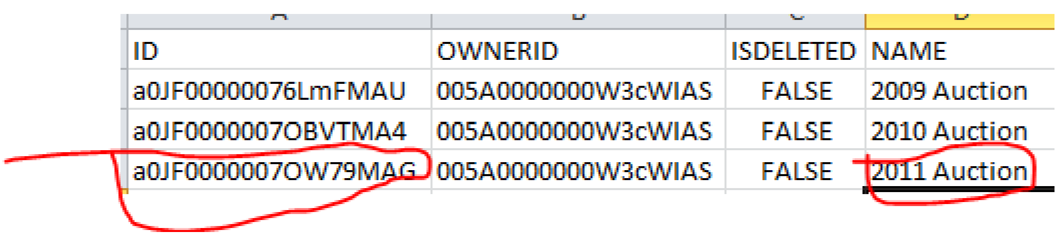
7. Select Auction (GW_Auctions_Auction_c) from the export list, and choose a name and a location for the file:



8. Select all of the fields, and click “finish”, and then select “yes” at the next dialogue box:

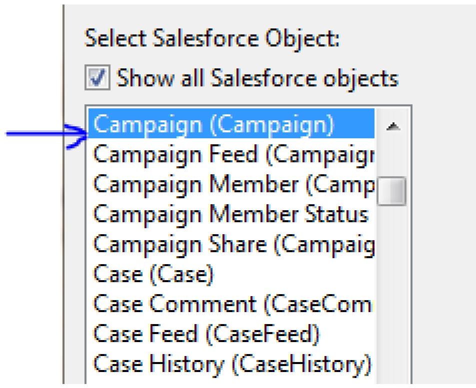


9. Open the file and find the name of the new Auction, and note the ID's – it will look something like this:



ID	OWNERID	ISDELETED	NAME
a0JF00000076LmFMAU	005A0000000W3cWIAS	FALSE	2009 Auction
a0JF0000007OBVTMA4	005A0000000W3cWIAS	FALSE	2010 Auction
a0JF0000007OW79MAG	005A0000000W3cWIAS	FALSE	2011 Auction

10. You'll need this ID later – next step is to ensure that you sync up your Auction attendee list with the contacts you have in Salesforce
11. Export Campaigns – you'll need to know of the ID numbers that are associated with your auction campaign. Follow the steps above, but export the Campaign (campaigns) module:



12. Make sure you look for the current Auction – it will be the ID you collected in the previous step.
13. Keep track of the other ID's associated with this Campaign – they will also be in the list – you'll want these items:
    a. 2012 Attendees
    b. 2012 Tickets
    c. 2012 Sponsors
    d. 2012 Item Donors
    e. Record Type ID (this will be the same for all of the above items)

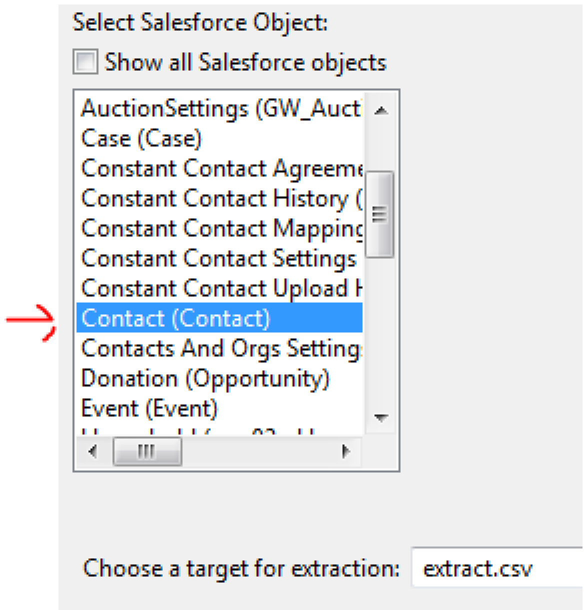
Sync Your Auction and Salesforce Contacts

As you may imagine – there are many ways to do this. Check with your Salesforce Administrator if needed to find the method that works best for you. The method I use follows these steps:

1. Prepare your Auction attendee list
    a. Check for extra white spaces
    b. Review names for spelling mistakes
    c. If you have sample or fake names, assign them to a sample or fake contact that already exists in Salesforce, and make a note about who they were with "John's Guest)

Export your Salesforce Contacts

1. Export your contacts (see steps 4-6 above), but select "Contact" instead, and give the file a name and a location:



2. Follow step 8 in the “Create a new auction” section
3. Open the file in Microsoft Excel
4. You only need to keep 3 columns of Data:
    a. ID
    b. AccountID
    c. Name
5. Delete all of the other columns in the spreadsheet

Tidy up your Auction Attendee List

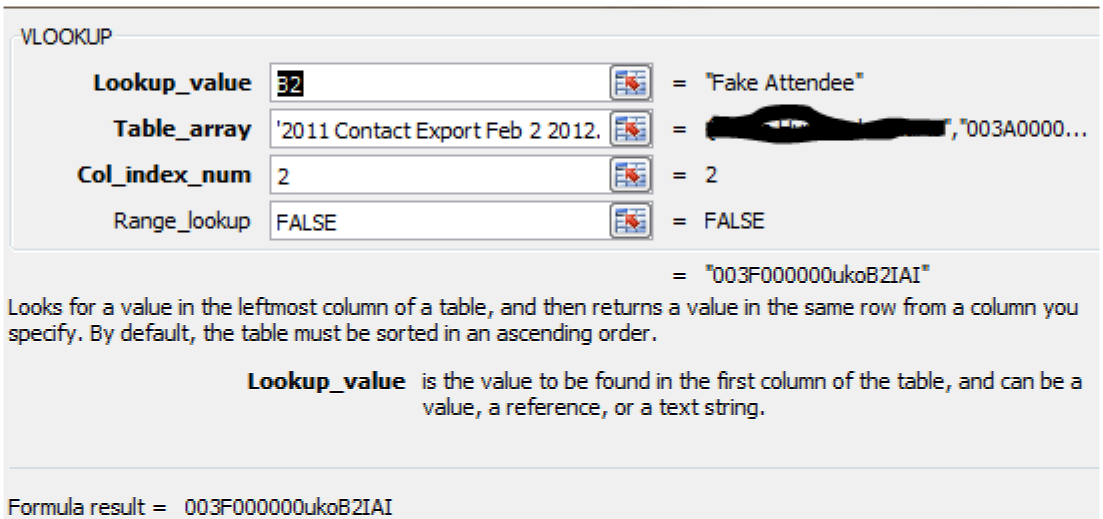
When preparing your Attendee list, look carefully at those names. When you match to Salesforce, it will look for an exact match, so if your Attendee list says “Tom Smith”, but Salesforce has “Thomas Smith”, you’ll have to decide if it is the same person. If it is, adjust the name on your Attendee list.

You’ll also need to look for partial names, such as “Tom’s Brother”. You can either call Tom (or someone else) to find out that name, or you can assign that person to a fake contact record. To make it really easy, create a contact in Salesforce with the first name of Fake, and a last name of Attendee. Again – check with your Salesforce Administrator and your Auction team to decide how to handle names.

Match Name with Salesforce Contact ID using V-lookup

1. Open both your Attendee spreadsheet and Contact Export spreadsheet.
2. On the Contact export spreadsheet, put the columns in this order:
    a. Name
    b. ContactID
    c. AccountID

3. Sort by name
4. Save the spreadsheet
5. On the Attendee spreadsheet, you should have two blank columns:
    a. ContactID
    b. AccountID
6. Insert the Vlookup function in the ContactID cell. Use the Contact Export spreadsheet for your source data. It will probably look something like this:



You can see that I am looking up the name Fake Attendee. And I am searching the columns and rows from my Contact Export spreadsheet. And I'm asking it "please find the name "Fake Attendee" and tell me the contact ID, which is in column 2. And since I want each contact ID to be unique, I set the Range Lookup value to False – that's because Salesforce always creates a unique ID – so there shouldn't be any duplicates in the Contact Export sheet.

7. Copy the formula to the bottom of the column
8. If you have errors, review the features of V-Lookup
9. If you still have errors, check the spelling of the names, and adjust your Attendee list accordingly
10. Double check! Find someone that you just assigned a contact ID to on our Attendee sheet, and then look them up in Salesforce. And then look them up on your Contact Export to make sure that you've made a match!

Import Contacts That Did Not Match

Even though in the last step – you did your best to match the contacts – you can import the new contacts as Leads. This will give you the option to allow Salesforce one more chance to try and find a match – helping you keep your data free from duplicates! (You can skip this step, and import the list directly as a Contact list if you prefer).

1. Copy the names of the contacts to be imported to a new spreadsheet. Include these fields
    a. First Name (John)
    b. Last Name (Smith)
    c. Company (Company should be the first and last name together (John Smith)
2. Save as a CSV file
3. Open the Data Loader (see steps, above) and import as Leads
4. Select "today's leads"
5. Shift+click on the first name (opens in a new window) and select the "search for duplicates" button. If you find a dup, you can merge.
6. After de-duping the lead, select the "convert lead" button
7. In the next dialogue box, under "contact" select "Create New" to create a new contact.
8. Continue until you have a new contact record for all of the new folks!

Export your Salesforce Contacts (Again)

See the above steps. Now that you have added new people and they have an ID – you need to re-export so you can match them to your attendee list.

Match Name with Salesforce Account ID using V-lookup

Repeat the steps for matching the Contact ID, but this time use the third row – the one with the Account ID.

Review Your Work

Check again – make sure that contacts exist in Salesforce, and that you have both a ContactID and an AccountID for each in your spreadsheet!

Import Auction Items

Next step is to import your Auction items. If you are keeping track of where you got them – you'll need to import them as an Auction Donated Item. Otherwise, you'll just import them as Auction Items. Here's how:

Prepare Your Items Spreadsheet for Import

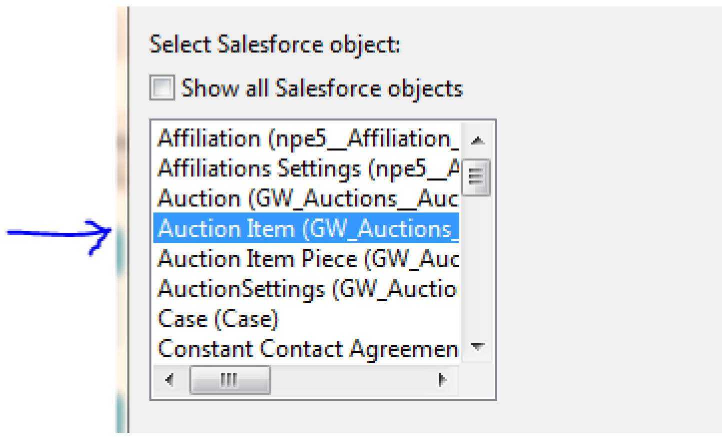
Remember – you'll need to import your items, and then export them with the unique ID that Salesforce assigned to each item. So your import should have these columns:

Item Name	This is the text name of the item – something like "2 Tickets to the Superbowl"
Item Category	If you are tracking the kind of item (tickets, experiences, food , travel), include those here
Fair Market Value	This is the value of the item
Item Description (if desired)	If you plan on printing an auction booklet, you can include that description here
Auction Group	If you have "rounds" of either silent, live, or both – indicate

	which round each item is for
CampaignID	This is the ID from your first step. Every item should have the same campaign ID (you want the Auction's ID, not one of its Campaign ID's.)

Note: You should check to make sure both your Item Category list and your Auction Group list in Salesforce has the same names that you are using in your spreadsheet.

1. Save your file as a .CSV file
2. Open the Apex Data Loader (see earlier steps), and select the Auction Item (GW_Auctions_Auction_Item_c) object



3. Select the file you prepared
4. Map the fields. They should look something like this:

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete.

File Column Header	Name
Auction Group	GW_Auctions__Auction_Group__c
AuctionItemName	GW_Auctions__Auction_Item_Name__c
Campaign ID	GW_Auctions__Auction__c
FMV	GW_Auctions__FMV_Override__c
Item Category	GW_Auctions__Category__c
Item Description	GW_Auctions__Description__c

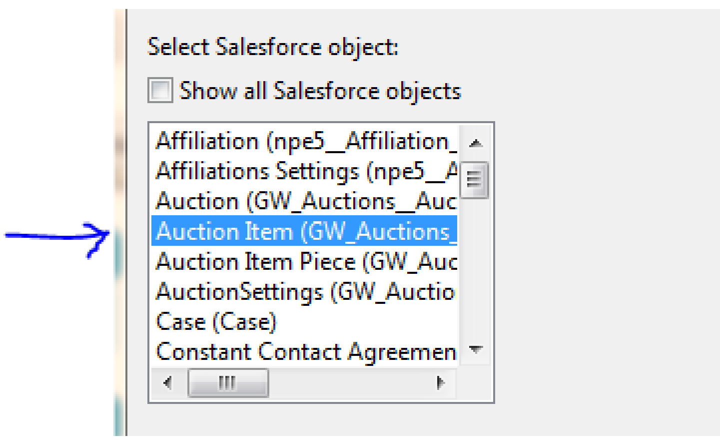
5. Complete the import.

6. Head on over to Salesforce, and review the items for your current auction to make sure everything looks right!

Update Your Spreadsheet with New IDs

Now that you've created your auction items in Salesforce, you'll need to add the new IDs to your spreadsheet. You have two options:

1. Whenever you use the DataLoader to insert or update objects, Salesforce will save a success file that contains your original CSV, with a new column for the ID of the objects inserted or updated. You can then use this file, rather than having to export out the ID's.
2. Export the Auction Items.
1. Open the Apex Data Loader (see earlier steps), and select the Auction Item (GW_Auctions_Auction_Item_c) object



2. Create a name and a location for your export
3. Open the file, and delete any auction items that are from previous auctions
4. Remember the Vlookup trick? You need to do that again, so you can ADD the Salesforce ID to your list of auction items.

Prep Your Campaign Attendees Import

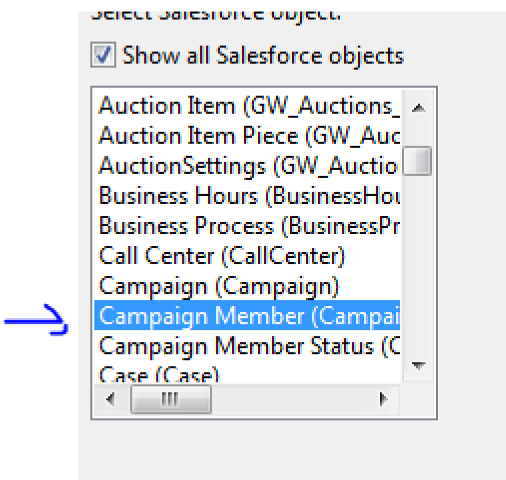
1. Create an Excel spreadsheet for importing your contacts to the auction campaign.

(You'll need these columns in your spreadsheet):

Account ID	And the Account ID that goes with John Smith. This is for your reference only – you don't need this for the import
Bid Number	This is John's bid number. Has to be a number, and it has to be unique. People can't share a bid number.
Campaign ID	This is the Campaign ID for the **Attendees** list
Contact ID	This is the Contact ID that goes with John Smith

Is Table Captain	If the person is a table captain, set this to "TRUE" and if they are not, set it to "FALSE"
Contact Name	This is the full name of the Contact, like "John Smith". This is for your reference only.
Note	Any notes you have about this person. For instance, if you are using a fake name, because you don't know who this person was, but you know it was John Smith's mom, you can put "John Smith's Mom" in the notes field.
Status	If they attended, this should say "RSVP Yes". If they were invited but did not attend, set it to "RSVP No"
Table Captain Name	This is the name of the table captain. This is for your reference only.
Table Captain Contact ID	Use Vlookup to find the unique contact ID for the table captain, and enter it in the cell. This will automatically assign the right table captain to each attendee when you import them
Table Name	This is the name of the table. For instance, it could be "Seattle Seahawks Table", or it could be "Julie Jones Table".
Table Number	This is for your reference only

2. Save it as a .CSV file, and fire up the Apex Data Loader – we're going to import these folks to the Auction Campaign!
3. In the Apex Data Loader, check the "Show all Salesforce objects", and look for the item called "Campaign Member (Campaign Member)".



4. Browse to the CSV file you created, and create a field map. It should look something like this:

File Column Header	Name
AccountID	
Bid Number	GW_Auctions__Bid_Number__c
CampaignID(Attendees)	CampaignId
ContactId	ContactId
IsTableCaptain	GW_Auctions__Is_Table_Captain__c
Name	
Note	GW_Auctions__Note__c
RecordTypeID	
Status	Status
Table Captain Name	
TableCaptianContactID	GW_Auctions__Table_Captain__c
TableName	GW_Auctions__Table_Name_Number__c
TableNumber	

(The blank items are the fields we left in for your reference – it's okay to leave those blank)

5. Import your records!
6. Review your import. If you get a message indicating that there are errors, you'll want to open that spreadsheet and review. Common errors include:
   1. Duplicate bid numbers
   2. Trying to add someone more than once (Like a fake attendee name)
   3. If you have merged contacts in between steps, so the name or ID is no longer valid

Import Auction Bids (Purchases)

Almost done! Now that you have all of the right Contacts in Salesforce, you've added them to a Campaign, they have a Bid Number, are sitting at a Table, and have a Table Captain, and you've imported the Auction Items – now you need to create an opportunity for each winning and losing bid. So – back to your Excel spreadsheets!

1. Create an Excel spreadsheet for importing your Bid Import List to the auction campaign opportunities. You'll need these rows in your table:

Item Name	For your reference only.
Item Description	For your reference only
AuctionItemPurchasedID	This is the unique ID that Salesforce assigned to each item
Bid Number	It's okay if this repeats, because we hope that many people bid on each item. Sometimes the same person bids several times
Contact Name	For your reference only
Organization ID	This is the Organization (or Account) ID that is a unique number

	associated with each contact
Contact ID	This is the Unique contact ID
Amount	This is the amount of the bid. In your spreadsheet, do NOT enter this as currency, or with a dollar sign.
Stage	Losing bids should be marked “Closed – Lost”. Winning bids should be marked “Closed – Thank You Sent”
Donation Name	Check with your Salesforce administrator regarding naming conventions. But it should probably tell you a lot –something like: John Smith – 2012 Auction Bid
Probability	Set all of these to 100
Close Date	Set this to the date of the Auction
Donation RecordTypeId	You collected this earlier.
CampaignID – Attendees	This is the campaign ID for Auction Attendees
Auction ID	This is the Auction ID for the overall auction
Item Note	A text field for any notes such as “This Fake Attendee is John Smith’s Wife”.

2. Open the Apex Data Loader (see earlier steps), and select the Opportunity object
3. Select the file you prepared
4. Map the fields. They should look something like this:

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete.

File Column Header	Name
AccountID	AccountId
Amount	Amount
Bid Number	
CapmaignID	CampaignId
CloseDate	CloseDate
ContactID	npe01__Contact_Id_for_Role__c
Contact Name	
Description	
DonationName	Name
GW_AUCTIONS__AUCTION_DONATED_ITEM_NAME__C	GW_Auctions__Auction_Donated_Item_Name__c
ID (AuctionItem)	GW_Auctions__Auction_Item_Purchased__c
Note	Description
NPE01__CONTACT_ID_FOR_ROLE__C	
Probability	Probability
RecordTypeID	RecordTypeId
StageName	StageName
Type	Type

5. Complete the import and review your data

Review Your Work

Take some time to review ALL of your work. Ask your auction planning team to review, ask the person responsible for thank you letters, ask your financial person if the data you've collected is a close match for what you have recorded in your financial statements, and so on. You'll want to make sure that everyone substantially agrees with the data before you decide that you are done.

Start Planning

Use the data to plan for next year. Maybe you'll find that your "raise the paddle" was the most successful part of your evening. Or maybe you'll find that the Silent auction tired out your donors and they didn't have anything left to give. Or maybe you can tell that some people bid and never won – and that might be an opportunity for you to follow up with those individuals to secure a gift of a different sort. You get the idea – make sure you use the information you're collecting to plan a more effective auction next year!