Importing Registrant data to Altru

If your organization uses **Blackbaud Altru** as your CRM, its easy to export the files you need from Jlive to import them to **Altru**.

This guide is specifically for **Importing Registrants to Specific Events** within Altru.

When you have an event set up and need to add multiple participants, you can use an Excel spreadsheet in Comma Separated Values (CSV) format to import these participants onto the event record. If you only have a few participants that you need to add, it may be more efficient to manually add the participants. If you have a lot of participants you need to add at the same time, it will be more efficient to use the steps in this article.

Alternatively, you may wish simply to **Import Records** such as **Individuals**, **Organization Constituents**, or **Revenue** into Altru. You can read how to do so here on the official Blackbaud website.

If you are trying to import **Orders**, you can also download an **Orders CSV** which contains transactional data for each transaction as opposed to registrant data for each registration.

See: How to download Orders CSV

First, Create The Event to Altru

Before you can add participants to an event in Altru, the event must exist in the first place within Altru. The simplest approach would be to manually create the event in Altru.

However, if you have a set of a events that you want to create in bulk, you can import a CSV file to do so.

Here is a How to Import Events guide from the official Blackbaud website showing how to Import Events into Altru.

How to export Attendee CSV from Jlive

First, you will need to gather a list of the Registrants that you would like to import. Typically this is done by going to the Manage Event page on any event and visiting the Attendees page. Here you can find the download CSV button.

See: [How to download Attendee CSV](#)

How to Import Registrants into Altru via CSV

Here are [Import Instructions](#) on the official Blackbaud website. Or you can please read below:

Import Event Participants

Note : Before you proceed with the following instructions, [back up the database](#). If your organization integrates multiple Blackbaud products, refer to the Additional Requirements section of the backup article.

If you are new to importing, please review [How to import](#) before proceeding.

1. [Create a data file](#) or use an existing file.

   - [View a sample data file](#) (7EventParticipant.CSV), which imports Phillip Keller (constituent) and Keith O'Reilly (non-constituent) as participants on the Alta Tennis Tournament event. Because Phillip Keller is a constituent, the event information also displays on the Events tab of Phillip's constituent record.
   - **Note:** The participant import does not import the constituent information. It only links the participant record to an existing constituent record. If you need to import the constituent record as well, first [import the constituent information](#) using a constituent import. Then run the participant import including the import IDs of the newly imported constituents. The only difference between importing participants that have a constituent record than those that don't is that you must include the constituent import ID (ImportID) of the existing constituent record.
   - You may need to widen the columns to view all of the information in a

column. The sample file contains all of the required fields. Your actual import file should contain, at a minimum, all of the fields from the sample file. The sample file was tested in versions 7.84.1720.0. Other versions may vary slightly in the available fields.

- Although headers are not required in The Raiser's Edge, we recommend using them. Otherwise, you must manually map the fields in the data file to the corresponding fields in The Raiser's Edge. You can save the file in any delimited format or in fixed length. However, this example and the sample data file are in [CSV format](#).

2. Include the following fields in the data file (for a sample file, refer to step 1 above). Fields in italics are required fields for a participant import. Some of the fields in italics are required conditionally. For example, the constituent import ID is only needed if the participant has his own constituent record.

- **Headers**

  ImportID, *REGImpID, EventID*, REGTitl1, REGFirstName, REGLastName, *REGKeyInd*, REGParticipation, REGRegistration, REGRegDate, REGAttended, REGDatePaid, REGAmtPaid, REGStatus, REGInvite

- **Fields**

  Constituent Import ID, *Event Participant Import ID, Event ID*, Event Participant Title 1, Event Participant First Name, Event Participant Last Name, *Event Participant Key Indicator*, Event Participant – Participation, Event Participant Event Registration, Event Participant Date, Event Participant Attended, Event Participant Date Paid, Event Participant Amount Paid, Event Participant Status, Event Participant Invitation

Note: In Excel, [use Text as the column type fields with a leading zero](#). Otherwise, Excel drops the leading zeros.

Note : To locate the Event Participant Import ID you will need to run an export and put that into your Import File. You can export this information by utilizing a Participant or Event Export and on the Output Tab adding Participant > Import ID

- If necessary, include other fields in the data file that are available for this import type. Refer to the Participant Fields section of the [Import](#)

Guide (PDF) for a list of available fields (layout table) and for what each is used. In version 7.5 and above, you can also access the layout table from the Fields tab in the import parameters.

- **In Import**, select **Participant from the Event category**. Click New and select the following parameters. For more information on what these parameters mean, refer to [How to import in The Raiser's Edge 7 – The Basics of Importing](#).

General Tab:

- **What do you want to do?** Update existing records
- **Options:** Import records not found as new records
- **What file to you wish to import?** Browse to the import file
- **How do you want the system to identify existing constituents?** Use the Import ID*
- **What is the format of this import file?** Delimited

File Layout Tab:

- **Field Separators and Text Qualifiers:** Comma, Quotation
- **Import Field Names:** Field names are on the first line of the import file
- **Sample Import Format:** Verify the first few rows of the import file

Fields Tab:

- In the Import Fields frame, verify that all rows in the Field to Import column are correctly mapped to the corresponding field in the Raiser's Edge Field column.
- Pay attention to the Extensions column. For example, groupings of phone number fields in the import file must share the same extension.

Summary Tab:

- We recommend marking all available checkboxes. At the very least, mark the Create control report option.

How to Manually Add Event Participants

to Altru

1. Navigate to Records > Events
2. Open the appropriate event record
3. Select the Participants tab
4. Click New Registrant, New Guest or New Sponsor
5. Specify whether the participant is an individual or an organization
6. In the Last Name field, use the binoculars to locate the constituent who attended the event or manually add the participant information if they are not a constituent
7. Enter the appropriate information on the particpant record
8. Save and close the New participant window
9. The participant is now listed on the Participants tab of the Event. If the participant is a constituent, the event will also be listed on the Event tab of the constituent's record.

Additional Resources:

- [How to import event participants (includes sample data file)](#)
- [Event Management Data Entry Guide](#).