

Migrating Your Data to Percent Pledge

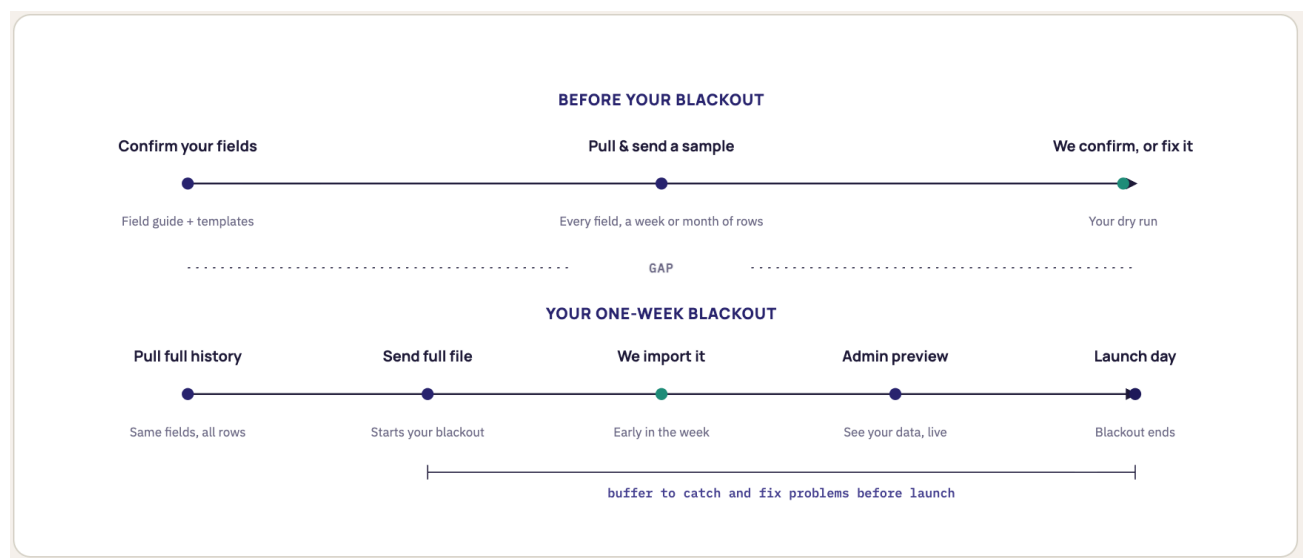
Use this guide to migrate your historical data (including giving history, volunteer hours, and matching balances) from your current system into Percent Pledge. When we complete this process, your employees will see all their same data when they sign into Percent Pledge.

Before you start

- **What you'll need:** access to your current platform's data exports, and our three CSV templates to put that data into.

How it works

- Confirm exactly what data you need, using our field guide and templates.
- Pull a small sample from your current system, covering every field you'll eventually send, and load it into our templates.
- Send us your sample. This is your dry run, so we can confirm the format works before anything is time-pressured.
- Once your sample is confirmed, pull your full history and send it to us at the start of your one-week blackout.
- We import your data, your admins preview it, and you launch.



The detailed steps

1. **Confirm your data fields.** Check the field guide at the end of this document, or the CSV templates themselves, to see exactly which data fields we need and in what format.
2. **Pull a sample from your current system.** Include every field you'll eventually send us, but only a week or a month of rows, not your full history yet.
3. **Load your sample into our CSV templates.**
4. **Send us your sample.** This is your dry run.
5. **We confirm your sample, or work with you to fix it.** This may take a round or two. Either way, you'll know your format is right before it matters.
6. **At the start of your blackout week, pull your full historical data.** Same fields you already confirmed, all your rows this time.
7. **Load your full data into the templates, and send it to us.** This is what starts your one-week blackout.
8. **We import your data.** Early in the week, so there's time to fix anything before you launch.
9. **Your admins preview your data.** Log into Percent Pledge and see your history loaded, before your employees do.
10. **Launch day.** Your blackout ends, and your employees see their full history.

Getting your data out of your current system

Your current platform should let you export reports covering:

- Donation history, including any employer matching already given
- Donation or rewards credits already spent
- Volunteer activity and hours

Exactly where to find these exports depends on your platform, and the field names your system uses may not match ours exactly. Our CSV templates tell you exactly what we need.

Putting your data in our templates

Use our three CSV templates: donation history, donation credits, and volunteering. Each one tells you which columns are required, the format each one needs, and includes sample rows covering every field.

Please see the field guide at the end of this document. It covers every column in detail.

Rules that apply across all three templates:

- Every row needs all of its required columns filled in, or that row won't import.
- Amounts are USD only. Convert other currencies to USD at a fixed exchange rate before sending us the file.
- Every user_email must already exist in Percent Pledge before you send us the file. Your Percent Pledge contact sets this up separately with you, through your HRIS integration.
- Save your completed file as a CSV before sending it back to us.

Why a one-week blackout

Sending your full data file starts a one-week pause on your current platform, ending on your launch day. In exchange:

- All your data comes over cleanly, with nothing missed and nothing duplicated.
- No employee ends up with a matching budget higher than what they actually earned.
- Every employee has the same, consistent experience on launch day.

Consider telling employees about the blackout ahead of time: give before this date, or after this date, not during. That keeps expectations clear and heads off any anxiety about lost activity.

Your timeline

Once you share your launch date, we'll work out your specific dates together. Here's how the pieces fit:

Milestone	When
You send us a data sample (dry run)	Before your blackout week
We confirm your sample, or help you fix it	Before your blackout week
Blackout begins, you send your full data file	Start of your blackout week
We import your data	Early in your blackout week
Admin preview: log in and see your data	A few days before launch
Launch day	End of your one-week blackout

A few things worth knowing

- If a file is missing required data or in the wrong format, we'll send it back to you to fix. That's what the dry run is for, catching this early, before it's time-pressured.
- Missing your agreed dates can push your launch date back.

Questions?

Your Percent Pledge contact is here to help, at every step.

Field Guide: Historic Donations

Column	Required or Optional	Format	Example
user_email	Required	Text. Must already exist as a user in Percent Pledge.	john.doe@acme.com
user_first_name	Optional	Text. Employee's first name.	John
user_last_name	Optional	Text. Employee's last name.	Doe
cause_id	Required	Text or number. The charity's EIN or tax ID from your export.	12-3456789
cause_name	Required	Text. The charity's full name.	Save the Rainforest
transaction_date	Required	Date. YYYY-MM-DD.	2024-05-30
total_user_donation_amount	Required	Number. Decimal USD, no dollar sign or commas. The amount the employee donated.	100.00
corporate_match_amount	Optional	Number. Decimal USD, no dollar sign or commas. The match amount.	50.00

Field Guide: Historic Donation Credits

This template covers credits your employees have already spent, not unused or remaining credit balances.

Column	Required or Optional	Format	Example
user_email	Required	Text. Must already exist as a user in Percent Pledge.	john.doe@acme.com
user_first_name	Optional	Text. The employee's first name.	John
user_last_name	Optional	Text. The employee's last name.	Doe
cause_id	Required	Text or number. The charity's EIN or tax ID from your export.	12-3456789
cause_name	Required	Text. The charity's full name.	Save the Rainforest
transaction_date	Required	Date. YYYY-MM-DD.	2024-05-30
rewards_donation_amount	Required	Number. Decimal USD, no dollar sign or commas. The amount of credit spent.	50.00

Field Guide: Historic Volunteering

Column	Required or Optional	Format	Example
user_email	Required	Text. Must already exist as a user in Percent Pledge.	john.doe@acme.com
user_first_name	Optional	Text. The employee's first name.	John
user_last_name	Optional	Text. The employee's last name.	Doe
volunteer_opportunity_name	Required	Text. The name of the volunteer event or opportunity.	Central Park Cleanup
cause_name	Optional	Text. The charity or cause supported, if any.	NYC Cares
country_location	Required	Text. 2-letter ISO-3166 country code.	US
volunteer_submission_date_of_service_start_date	Required	Date. YYYY-MM-DD.	2024-05-30
volunteer_submission_time_hours	Required	Number. Decimal hours.	2.5