

Export Reporting for CRM Upload

Last Modified on 04/22/2022 12:03 am EDT

The CRM upload requirements determine the series of steps to be taken. The path to successfully upload the reporting data will be determined by the CRM requirement surrounding the CRM ID, however, the first step will remain the same for any CRM.

Watch a Video

Export Purchaser Detail Report

The Purchaser Detail report provides all reporting data needed to import the data back into your specific CRM.

1. From the **Admin Navigation**, select **Reports > Purchaser Detail**.
2. Export the report in the desired format (Excel or CSV are the preferred formats for CRM upload template conversion).

Note: Purchaser details from multiple campaigns can be exported via the [Org Hub Reporting](#).

Import CRM Template

To locate the CRM Upload Template or to confirm if it requires the CRM ID, please reach out to your CRM Support Team to acquire this information.

CRM Does Not Require CRM ID (most common)

1. Copy necessary fields from exported Purchaser Details report, paste onto the CRM Upload Template.
2. Upload template to CRM.

CRM Requires CRM ID

1. Export a user report from the CRM which includes a CRM ID field.
2. Combine exported CRM report with the exported Purchaser Details report to add the ID's to the Purchaser Detail Report.
3. Copy the necessary fields from the exported Purchaser Details report, paste onto CRM Upload Template.
4. Upload template to CRM.

Note: If the CRM ID's were already included on the campaign as a User Custom Field, then

these ID's will be included on the Purchaser Details report when exported.
