

Import Donors from Millennium

Last Modified on 05/20/2022 12:57 am EDT

Once the donor list is exported from Millennium, make a few adjustments to ensure that the donor list uploads successfully.

Note: Reach out to our Support with additional questions.

Example of Exported Donor List

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	CLIE	ema	FNA	MN	LNA	SUF	Pho	H_S	H_S	H_S	H_C	H_S	H_Z	
2	000000001	smith@smith.com	John	MN	Anderson		1234567890	123 Anderson Lane				Andersonville	IL	12345
3	000000002	todd@todd.com	Todd		Black		1234567898	456 Black Dr				Queens	NJ	54321
4	000000003	josh@josh.com	Josh		Crown		1234567891	987 Royalty Circle				Statesville	SC	98765
5	000000004	sarah@sarah.com	Sarah		Donovan		1234567892	45 Donovan Dr				Quinly	SC	87654
6	000000005	bill@bill.com	Bill		Elliott	M.D.	1234567893	543 Elliott St				Jupiter	SC	76543
7	000000006	steph@steph.com	Stephanie		Forester		1234567895	333 Forest Lane				Paris	WV	12356

By moving and re-naming a few of these columns and pasting them onto the Guest List Template, admins will be able to import this list of donors directly to your campaign.

Import Millennium donors to GiveSmart

1. Open exported Millennium donor report.
2. Delete the following columns
 - o The blank Column 'C' (the one after the e-mail)
 - o MN - middle name
 - o SUF - suffix
 - o the 2nd and 3rd H_S columns

	A	B	C	D	E	F	G	H	I
1	CLIE	ema	FNA	LNA	Pho	H_S	H_C	H_S	H_Z
2	000000001	smith@smith.com	John	Anderson	1234567890	123 Anderson Lane	Andersonville	IL	12345
3	000000002	todd@todd.com	Todd	Black	1234567898	456 Black Dr	Queens	NJ	54321
4	000000003	josh@josh.com	Josh	Crown	1234567891	987 Royalty Circle	Statesville	SC	98765
5	000000004	sarah@sarah.com	Sarah	Donovan	1234567892	45 Donovan Dr	Quinly	SC	87654
6	000000005	bill@bill.com	Bill	Elliott	1234567893	543 Elliott St	Jupiter	SC	76543
7	000000006	steph@steph.com	Stephanie	Forester	1234567895	333 Forest Lane	Paris	WV	12356

3. Insert 4 blank columns in front of the CLIE column.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1					CLIE	ema	FNA	LNA	Pho	H_S	H_C	H_S	H_Z
2					000000001	smith@smith.com	John	Anderson	1234567890	123 Anderson Lane	Andersonville	IL	12345
3					000000002	todd@todd.com	Todd	Black	1234567898	456 Black Dr	Queens	NJ	54321
4					000000003	josh@josh.com	Josh	Crown	1234567891	987 Royalty Circle	Statesville	SC	98765
5					000000004	sarah@sarah.com	Sarah	Donovan	1234567892	45 Donovan Dr	Quinly	SC	87654
6					000000005	bill@bill.com	Bill	Elliott	1234567893	543 Elliott St	Jupiter	SC	76543
7					000000006	steph@steph.com	Stephanie	Forester	1234567895	333 Forest Lane	Paris	WV	12356

4. Cut and Paste the FNA and LNA columns into columns A and B.
5. Cut and paste the Pho column into column C.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	FNA	LNA	Pho		CLIE	ema				H_S	H_C	H_S	H_Z
2	John	Anderson	1234567890		000000001	smith@smith.com				123 Anderson	Andersonville	IL	12345
3	Todd	Black	1234567898		000000002	todd@todd.com				456 Black Dr	Queens	NJ	54321
4	Josh	Crown	1234567891		000000003	josh@josh.com				987 Royalty Ct	Statesville	SC	98765
5	Sarah	Donovan	1234567892		000000004	sarah@sarah.com				45 Donovan Dr	Quinly	SC	87654
6	Bill	Elliott	1234567893		000000005	bill@bill.com				543 Elliott St	Jupitor	SC	76543
7	Stephanie	Forester	1234567895		000000006	steph@steph.com				333 Forest Lane	Paris	WV	12356

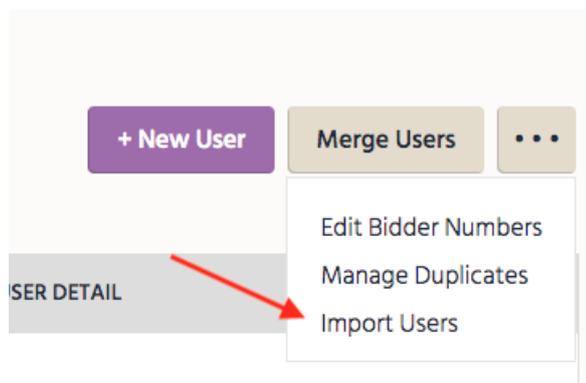
- Delete the 3 blank columns after the e-mail address.
- Insert 1 blank column after the CLIE column.

	A	B	C	D	E	F	G	H	I	J	K
1	FNA	LNA	Pho		CLIE		ema	H_S	H_C	H_S	H_Z
2	John	Anderson	1234567890		000000001		smith@smith.com	123 Anderson	Andersonville	IL	12345
3	Todd	Black	1234567898		000000002		todd@todd.com	456 Black Dr	Queens	NJ	54321
4	Josh	Crown	1234567891		000000003		josh@josh.com	987 Royalty Ct	Statesville	SC	98765
5	Sarah	Donovan	1234567892		000000004		sarah@sarah.com	45 Donovan Dr	Quinly	SC	87654
6	Bill	Elliott	1234567893		000000005		bill@bill.com	543 Elliott St	Jupitor	SC	76543
7	Stephanie	Forester	1234567895		000000006		steph@steph.com	333 Forest Lane	Paris	WV	12356

- Rename the columns headings, which must appear exactly as shown below for the donors to be successfully imported.
 - Column A: First Name
 - Column B: Last Name
 - Column C: Phone
 - Column D: Bidder #
 - Column E: Field1
 - Column F: Field2
 - Column G: Email
 - Column H: Street
 - Column I: City
 - Column J: State
 - Column K: Zip

	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	Phone	Bidder #	Field1	Field2	Email	Street	City	State	Zip
2	John	Anderson	1234567890		000000001		smith@smith.com	123 Anderson	Andersonville	IL	12345
3	Todd	Black	1234567898		000000002		todd@todd.com	456 Black Dr	Queens	NJ	54321
4	Josh	Crown	1234567891		000000003		josh@josh.com	987 Royalty Ct	Statesville	SC	98765
5	Sarah	Donovan	1234567892		000000004		sarah@sarah.com	45 Donovan Dr	Quinly	SC	87654
6	Bill	Elliott	1234567893		000000005		bill@bill.com	543 Elliott St	Jupitor	SC	76543
7	Stephanie	Forester	1234567895		000000006		steph@steph.com	333 Forest Lane	Paris	WV	12356

- Save this report as an MS-Windows (CSV) file.
- Visit the campaign.
- From the **Admin Navigation**, select **Users > Details**.
- Click the More button ("...").
- Select **Import Users** from the dropdown.



- Select the file to import, then click **Begin Import**.

- 15. Select Other in the Field 1 dropdown, type in Millennium ID.
- 16. Check Hide from Users box.

USER IMPORT: Custom Fields

It looks like your list includes custom fields for your users. Please select a title for each field.

Field 1 [?]

Please enter the name of your custom field

Hide From Users

[Cancel Import](#)

- 17. Select Continue
- 18. A pop-up will appear showing that users have been uploaded successfully.
- 19. The imported donors will now appear on the View Admin > Users > Details page.

<input type="checkbox"/>	NAME	MILLENNIUMID
<input type="checkbox"/>	Anderson, John 555-555-5554	000001
<input type="checkbox"/>	Black, Todd 555-555-5552	000002
<input type="checkbox"/>	Crown, Josh 555-555-5556	000003
<input type="checkbox"/>	Donovan, Sarah 555-555-5557	000004
<input type="checkbox"/>	Elliott, Bill 555-555-5558	000005
<input type="checkbox"/>	Forester, Stephanie 555-555-5559	000006