Export from GiveSmart Events to Donor CRM

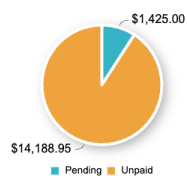Copy your reporting data from GiveSmart Events to GiveSmart Donor CRM with a few simple clicks.

Settle Remaining Balances

The first step is to ensure there are no outstanding balances for your event. View the Outstanding Balances report by

- Selecting **Reports** from the Admin Navigation, and choose **Balances** from the dropdown
- If there are any balances remaining as Pending or Unpaid, please settle these balances before continuing

Export Donor Data from GiveSmart Events

Locate and export the Donor CRM report on the Reports page.

- Click **Reports** from the Admin Navigation, and select **Overview**
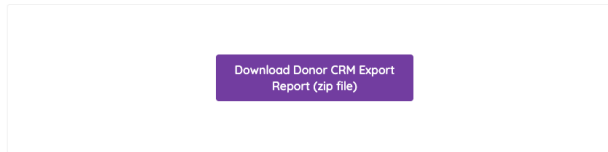- Scroll to the Exports section, and choose **Donor CRM**

- Once selected, click **Download Donor CRM Export Report (zip file)** to download

  Export: Donor CRM

  An export of this event's contact and transaction data to be uploaded into Donor CRM.

  [Download Donor CRM Export Report (zip file)]

- A zip file will download containing 2 CSV reports
  - Contacts
  - Transactions

> **IMPORTANT**: We recommend exporting this report after all transactions have been finalized at the completion of your event. The Donor CRM export provides all needed columns and information that will be needed to import to GiveSmart Donor CRM. There is no external report manipulation that needs to occur.

Exported Files

The Exported files will be two CSV (comma separated value) files in a zip. It is listed as "**events-donorcrm-import.zip**"

You will need to unzip the file to have direct access to each of the CSV files for import.

In the Zip, the two CSVs will be:

- **events-contacts-donorcrm-import.csv** This includes the Donor CRM Fields for the contact information:
  - DONOR_ID
  - FIRST_NAME
  - LAST_NAME
  - CREATED_AT
  - ANONYMOUS
  - CONTACT_METHODS_DICT.CELL_PHONE
  - CONTACT_METHODS_DICT.EMAIL
  - ADDRESSES.0.ADDRESS1
  - ADDRESSES.0.CITY
  - ADDRESSES.0.STATE_PROVINCE
  - ADDRESSES.0.POSTAL_CODE
- **events-transactions-donorcrm-import.csv** This includes the Donor CRM Fields for the gift information:
  - TRANSACTION_ID
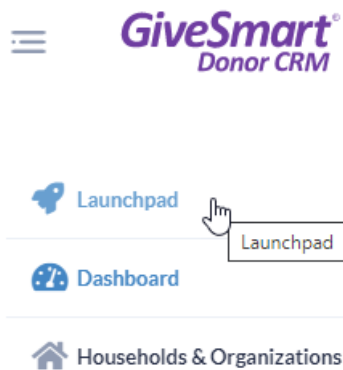 - DONOR_ID
  - GIFT_DATE
  - TY_DATE

- THANK_YOU_METHOD
- GIFT_AMOUNT
- SOLICIT_NAME
- SUB_SOLICIT_NAME
- GL_NAME
- CAMPAIGN_NAME
- NOTES
- FMV

Import Files

Now that you have exported the data from GiveSmart Events, visit your GiveSmart Donor CRM account to import the data.
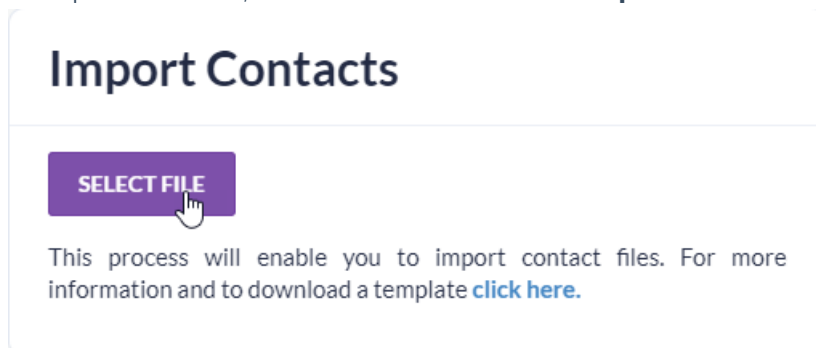
> Remember to unzip the files from the GiveSmart Events download!

- Click on Launchpad on the left

Import Contacts

- To import contacts, click on **Select File** in the **Import Contacts** box

- Select the CSV file from your hard drive wherever you saved/downloaded it. For the Contacts import, you want to choose the **events-contacts-donorcrm-import.csv**
- You will see the progress bar and Done message, then the Import Contacts will revert to normal, so you can enter another csv or import the gifts/transactions.

Import Contacts

This process will enable you to import contact files. For more information and to download a template **click here.**

Import Contacts

Done!

This process will enable you to import contact files. For more information and to download a template **click here.**

- You will also receive an email letting you know when the import is complete.

Bulk Import Complete!

GD notifications_crm=givesmart.com@mi
To ● Scott Couchman

8:35 AM

We have successfully imported 6 contacts (6 contacts updated), with 0 failures.

- You can check to see the new contacts in your **Donors & Contact** section.

Dashboard

Households & Organizations

Donors & Contacts

Donors & Contacts

Gifts

Import Gifts

- To import gifts (transactions), click on **Select File** in the **Import Gifts** box

Import Gifts

SELECT FILE

This process will enable you to import your historical gift transactions. For more information and to download a template **click here.**

- Select the file from your hard drive wherever it saved. For the Gifts import, you want to choose the **events-transactions-donorcrm-import.csv.**
- You will see the progress bar and Done message, then the Import Gifts will revert to normal, so you can enter another csv.
  You will also receive an email letting you know when the import is complete.

Bulk Import Complete!

GD   notifications_crm=givesmart.com@ma
      To ● Scott Couchman   8:37 AM

We have successfully imported 143 transactions (0 transactions updated), with 0 failures.

- You can check to see the newly imported gifts in your **Gifts** > **Gift listing** section.

🎁 **Gifts**   ⌄

☰ **Gift listing**
                    Gift listing

➕ **Add a new Gift**

✉ **Send Gift Thank Yous**