Data Conversion

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GiveSmart Donor CRM Data Conversion

When you add GiveSmart Donor CRM, our Services Team will perform your data conversion to get all of your external data into Donor CRM. However there are still a few items that will need to be completed by you before the data is ready for conversion.

Prepare Your Data

1. **Gather your data.** The information we need from you is all your contact information along with any notes or valuable information that you need in your new GiveSmart Donor CRM. You will also want to provide historical donation information for each donor. We recommend you collect all your data from your current CRM or storage location to keep for your records even if it will not be imported into your new Donor CRM. Your data will need to be provided in two main files:
    - **Donor/Contact data.** This is a CSV (Comma Separated Values) file, like a one-page spreadsheet, that contains all the fields/columns of information about your donors. This includes fields such as First Name, Last Name, Mailing Address, Email Address, Telephone numbers, Notes, and even custom fields. If you have a second file for gifts, you will need a "Donor_ID" that is unique to each row in this file.
    - **Gift/Transaction data (optional).** This CSV file contains a row for each gift, with the first field identifying the Donor_ID as described above in the Contacts file. Additional fields include Gift Date, Gift Amount, General Ledger, Solicitation Method, Notes, and custom fields.
2. **Clean your data.** Now is the perfect time to ensure you have the cleanest and most current data imported into your new Donor CRM system. Our templates for Contacts and Gifts are good guides to get you pointed in the right direction. Click here to see our data cleanup tips.

Formatting the Data

- **Work done by you:** A reasonable amount. You will still need to upload the data to our secure folder in formats we can work with, such as CSV, XLSX, DBF, MDB, or SQL .BAK files, for example.
- **Work done by GiveSmart:** We provide you guidance to make sure we get the right data, especially from other CRM systems. We will analyze your data and schedule a mapping appointment to ask you questions about your data and make sure it's transferred to the right place in Donor CRM. We will then conduct training with your own data loaded into the CRM for your review.
- **Data Converted:** Typically, all Contact/Donor records and their associated gift transactions. For activity transactions, such as meeting records/notes associated with each contact record, we will assist you transferring them if the source data is listed below from one of the many CRMs we convert from.

Reviewing the Data

Step 1: Data Transfer Mapping

Once your data is loaded to your secure folder, your advisor will schedule a meeting for data mapping. The advisor will review your data, ask questions, and confirm your data's suitability for import; including if you should consider cleaning up your data prior to import.

Step 2: Final Data Loading

If you need to make changes to your data, or if you have an updated data set to load, this step allows you to load your final data to your secure folder for loading.

Step 3: Data Conversion Review

As part of your Data Conversion, we will review your converted data within Donor CRM for your review. This review process might uncover issues, and if we are able to fix them, we will. Please understand that sometimes the issues are with your own data and cannot be fixed by us, and if this happens, we will explain why and offer suggested solutions to help you.

The GiveSmart Data Conversion process is committed to help you seamlessly transfer your data. If you have any questions about this process, or otherwise want to learn more, please contact your Customer Success Manager for more information.