

# Manually export from GiveSmart Events to Import into Donor CRM

Last Modified on 12/05/2025 2:41 pm EST

## What are some situations where I'd need to manually import records into Donor CRM?

- Bring in Activities that occurred prior to Automated Data Sync being enabled
- Accidentally declined records during the data import & review step
- Transactions synced to Anonymous or Unknown User

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

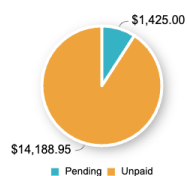
## Settle Remaining Balances

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

### Summary

Balances: \$15,613.95



Type	Users	Amount
Pending	5	\$1,425.00
Unpaid	32	\$14,188.95
Total:		\$15,613.95

## 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**

## Exports

Donor CRM  
Greater Giving  
Greater Giving  
Go Time  
Millennium  
FR50  
Purchaser  
Detail

- 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

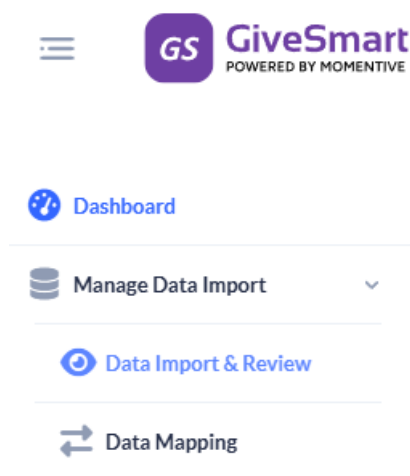
- CONTACT\_METHODS\_DICT.CELL\_PHONE
- CONTACT\_METHODS\_DICT.EMAIL
- ADDRESSES.0.ADDRESS1
- ADDRESSES.0.CITY
- ADDRESSES.0.STATE\_PROVINCE
- ADDRESSES.0.POSTAL\_CODE
- **events-transactions-donorcrm-import.csv** This includes the Donor CRM Fields for the gift information:
  - TRANSACTION\_ID
  - DONOR\_ID
  - 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!

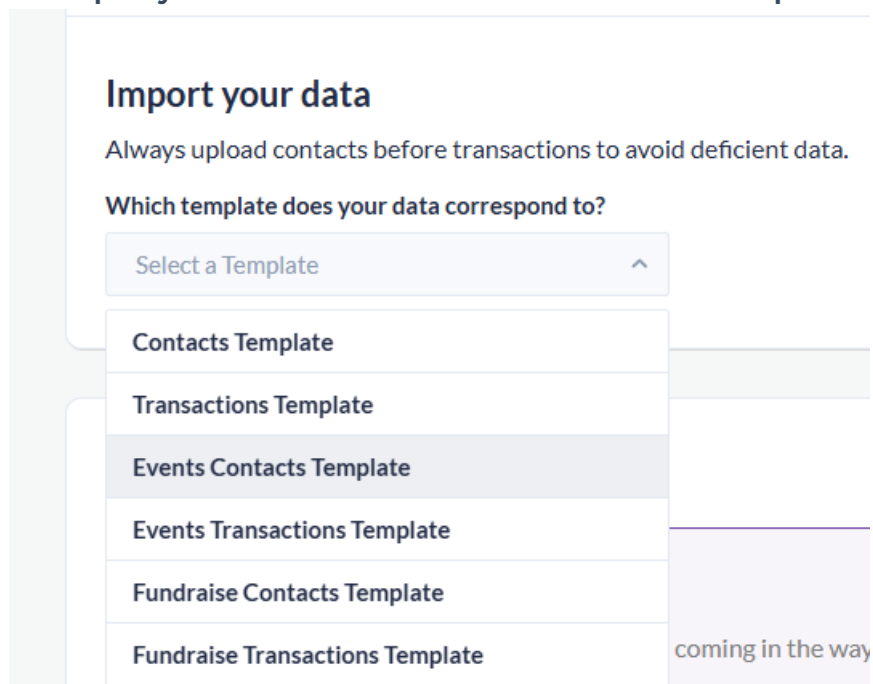
- Click on Manage Data Import-->Data Import & review on the left



## Import Contacts

- From the Data Import & Review section, click on **Select a Template dropdown** in

the **Import your Data** box and select **Events Contacts Template**



**Import your data**

Always upload contacts before transactions to avoid deficient data.

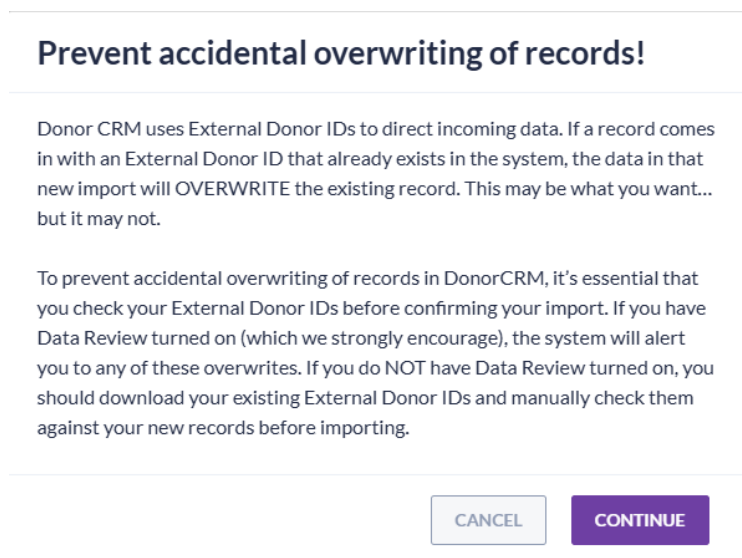
Which template does your data correspond to?

Select a Template ^

- Contacts Template
- Transactions Template
- Events Contacts Template**
- Events Transactions Template
- Fundraise Contacts Template
- Fundraise Transactions Template

coming in the way

- Browse for your file from your hard drive wherever you saved/downloaded it. For the Contacts import, you want to choose the **events-contacts-donorcrm-import.csv** and either drag and drop or click in the **Browse for your File** box to select from your folders.
- Click **Upload File**
- The following Warning will appear:



**Prevent accidental overwriting of records!**

Donor CRM uses External Donor IDs to direct incoming data. If a record comes in with an External Donor ID that already exists in the system, the data in that new import will **OVERWRITE** the existing record. This may be what you want... but it may not.

To prevent accidental overwriting of records in DonorCRM, it's essential that you check your External Donor IDs before confirming your import. If you have Data Review turned on (which we strongly encourage), the system will alert you to any of these overwrites. If you do NOT have Data Review turned on, you should download your existing External Donor IDs and manually check them against your new records before importing.

**CANCEL** **CONTINUE**

- The upload process will begin and once completed will return the following pop up:

## Import Successful

No errors found in the import file. You will receive an email confirmation after the Import is complete and ready for review. This process tends to take around 1 minute per 1000 records, but you'll start to see records coming in to review almost immediately.

[REVIEW LATER](#)[REVIEW IMPORT](#)

- Selecting **Review Import** takes you immediately to the **Import Review** section. More details on that process can be found [HERE](#)
- You will also receive an email letting you know when the import is complete.

## Bulk Import Complete!



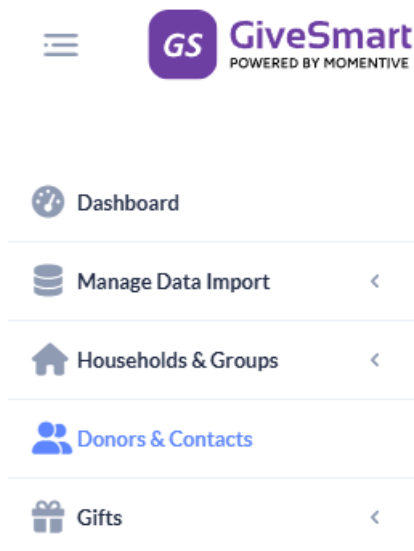
notifications\_crm=givesmart.com@m:  
To Scott Couchman



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.



## Import Gifts

- From the Data Import & Review section, click on **Select a Template dropdown** in the **Import your Data** box and select **Events Transactions Template**

## Import your data

Always upload contacts before transactions to avoid deficient data.

Which template does your data correspond to?

Select a Template ^

Contacts Template

Transactions Template

Events Contacts Template

Events Transactions Template

Fundraise Contacts Template

Fundraise Transactions Template

coming in the w

- Browse for your file from your hard drive wherever you saved/downloaded it. For the Contacts import, you want to choose the **events-transactions-donorcrm-import.csv** and either drag and drop or click in the **Browse for your File** box to select from your folders.
- Click **Upload file**
- You will see the progress bar and the following Done message

## Import Successful

No errors found in the import file. You will receive an email confirmation after the Import is complete and ready for review. This process tends to take around 1 minute per 1000 records, but you'll start to see records coming in to review almost immediately.

REVIEW LATER

REVIEW IMPORT

- Selecting **Review Import** takes you immediately to the **Import Review** section. More details on that process can be found [HERE](#)

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

## Bulk Import Complete!



notifications\_crm=givesmart.com@m:  
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