Manually export from GiveSmart Events to Import into Donor CRM

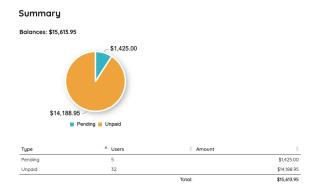
Last Modified on 11/26/2025 5:50 pm EST

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



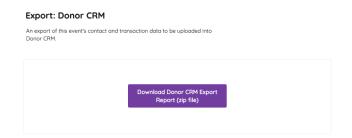
Export Donor Data from GiveSmart Events

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**

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



- 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.O.ADDRESS1
 - ADDRESSES.O.CITY
 - ADDRESSES.O.STATE_PROVINCE
 - ADDRESSES.O.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

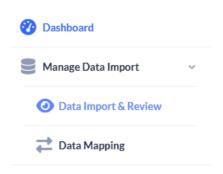
Import Files

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!

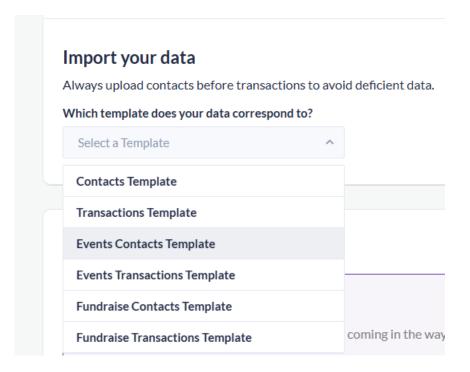
• Click on Manage Data Import-->Data Import & review on the left



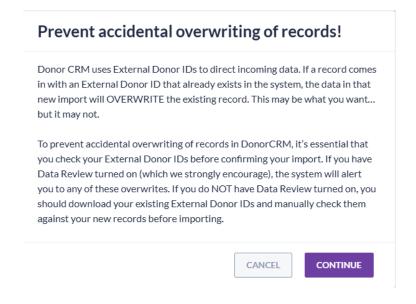


Import Contacts

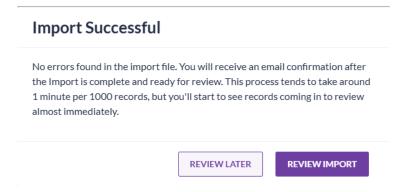
• From the Data Import & Review section, click on **Select a Template dropdown** in the **Import your Data** box and select **Events Contacts Template**



- 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:



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



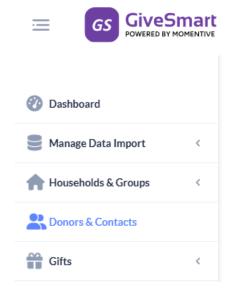
- Selecting Review Import takes you immediately to the Import Review section. More details on that process can be found HERE
- You will also receive an email letting you know when the import is complete.

Bulk Import Complete!



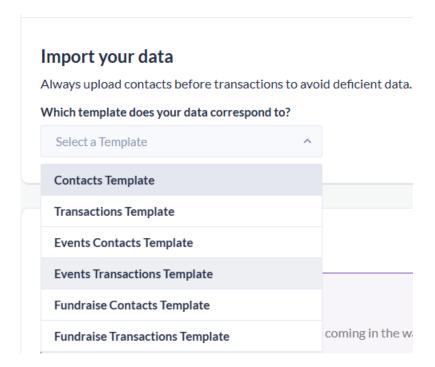
We have successfully imported 6 contacts (6 contacts updated), with 0 failures.

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

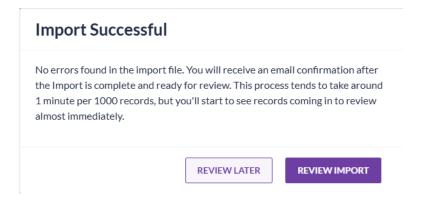


Import Gifts

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



- Browse for your file from your hard drive wherever you saved/downloaded it. For the
 Contacts import, you want to choose the events-transactions-donorcrmimport.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



• 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!



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.

