Manually export from GiveSmart Fundraise to Import into Donor CRM

Last Modified on 12/05/2025 2:43 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

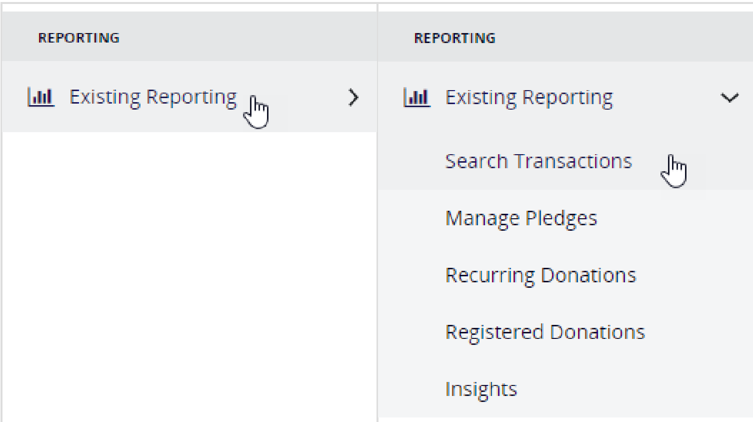
You can copy your reporting data from GiveSmart Fundraise to GiveSmart Donor CRM with a few simple clicks.

Exporting Donor Data from GiveSmart Fundraise

The first step is to gather your data from GiveSmart Fundraise. This is similar to any other Search Transactions report you may run. This article provides a streamlined process. For full information on running a Search Transactions report, **click here**.

Generate Report

- Go to **Reporting** > **Existing Reporting** > **Search Transactions**



- Build the report you wish to export. For more information on the options in the Report Builder, **click here**.

Currently, set it to only search for **Settled** transactions, no Pending/Refunded/Voided transactions.

Pay particular attention to the **Date Information**. You do not want to enter transactions that have already been imported into GiveSmart Donor CRM to avoid the risk of overwriting an update you made manually since the previous import. You can save your report (described below) to assist with this for multiple exports.

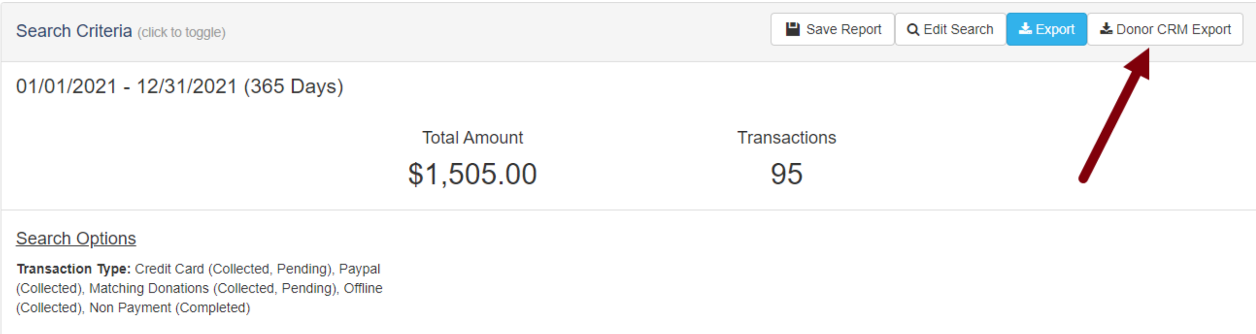
It is recommended to set the end date at least 3-4 days previous (so not a report of the same day or the day before), in case there are any issues with a transaction being cleared with the processor.

Note: it will only view the actual donations, not the matched donations.

Be aware, that you can import offline and non-payment supporter information, but it could exceed your Licensed Limit in your Donor CRM account, so watch what you actually are planning to import.

- Click **Search** when ready.

Review and Export



If you do not have the Donor CRM Export button, contact Support to make sure you have both GiveSmart Fundraise and GiveSmart Donor CRM so it can be enabled.

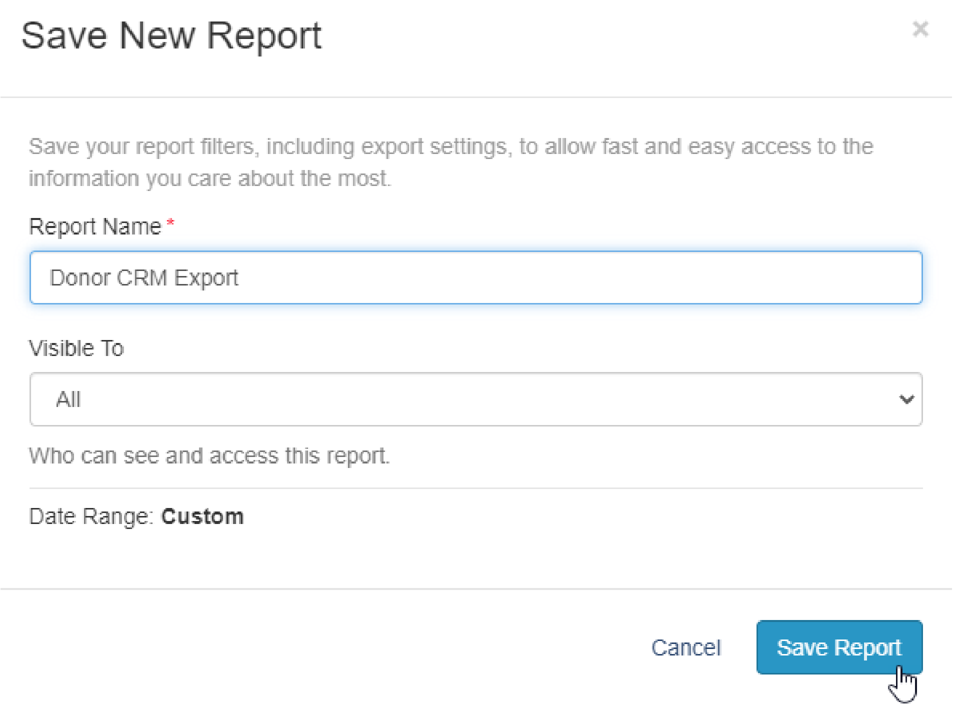
- Make sure your search criteria at the top of the generated report page have the correct information, ***especially the date range***.
- Click the Donor CRM Export button in the upper right.

The Donor CRM Export provides all the needed columns of information that will go into GiveSmart Donor CRM, so you do not have to manage the columns shown on the lower half of the page. Essentially, this is all you need, but we recommend saving the report for use later.

Save Report and Working with the Save

You have now exported the data and can start the import process for GiveSmart Donor CRM. But, it is very likely that you will have new donors, new supporters that you will want to import at a later time. To make this process easier, and to avoid potential duplicate entries, save your GiveSmart Fundraise report.

- Click the **Save Report** button and give your report a memorable name, like Donor CRM Export or whatever you prefer



- Click **Save Report**

Accessing the Saved Report

Now when you are ready to run the report again, you can:

- Go to **Reporting** > **Existing Reporting** > **Search Transactions**
- This time, click on the **Saved Reports** tab
- Click on the name of the report you wish to run (such as Donor CRM Export)
    - All your previous search criteria will show and be used to run the report
- Click on Edit Search
- Change the Date Information
- Scroll down and click Search
- Export your new Donor CRM data with the Donor CRM Export button

> You will likely want to **save** this "new" report so you have a nice record of the last time you ran it, so the next time you know when to start the next report. Saved Reports do not save changes you make when you run them, so you would need to **create a new Saved Report**.

Export Files

The Exported files will be two CSV (comma separated value) files in a zip. It is listed as "donorcrm_export_####_[date of export].zip"

For example, donorcrm_export_2051_20220912.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:

- **donors__####_[date of export].csv** This includes the Donor CRM Fields for the donor information:
    - **DONOR_ID**: A unique database ID to differentiate between each donor.
    - **FIRST_NAME**: First Name
    - **LAST_NAME**: Last Name
    - **CREATED_AT**: The date this donor first was added to the GiveSmart Fundraise system
    - **CONTACT_METHODS_DICT.CELL_PHONE**: Phone number
    - **CONTACT_METHODS_DICT.EMAIL**: Email
    - **ADDRESSES.0.ADDRESS1**: Street Address
    - **ADDRESSES.0.CITY**: City
    - **ADDRESSES.0.STATE_PROVINCE**: State
    - **ADDRESSES.0.POSTAL_CODE**: Zip Code
- **txns__####_[date of export].csv** This includes the Donor CRM Fields for the donation information:
    - **TRANSACTION_ID**: A unique database ID of the transaction / donation
    - **DONOR_ID**: The same Donor ID in the donor list's CSV
    - **GIFT_DATE**: The date of the transaction/donation
    - **THANK_YOU_METHOD**: Whether a Thank You note should be sent to this donor from within Donor CRM. Since GiveSmart Fundraise automatically thanks each donor, this will default to NO_THANK_YOU to tell Donor CRM no additional thank you note is needed.
    - **GIFT_AMOUNT**: Donation amount
    - **SOLICIT_NAME**: This will display the Activity Type (Fundraising or Crowdfunding) associated to each gift
    - **SUB_SOLICIT_NAME**: The type of transaction, such as a donation or ticket sale
    - **CAMPAIGN_NAME**: This is the friendly name of the campaign within your GiveSmart Fundraise account
    - **CAMPAIGN_ID**: A unique database ID for the campaign
    - **NOTES**: This provides the form name, keyword and shortcode, and campaign name associated to each gift
    - **SOLICIT_ID**: A unique database ID for the activity
    - **FAIR_MARKET_VALUE**: The Fair Market Value of the donation, tickets and/or items included in the transaction

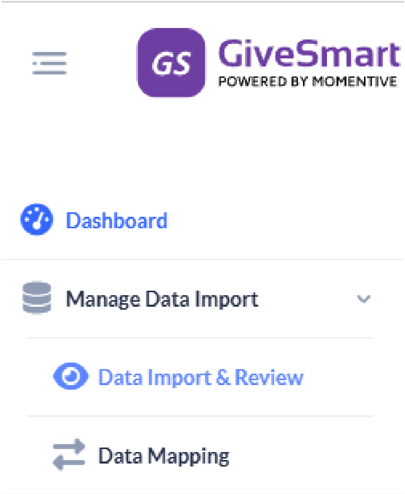
Importing the Data into Donor CRM

Now that you have the export from your GiveSmart Fundraise account, go into your GiveSmart Donor CRM account to import the data.

Remember to unzip the files from the GiveSmart Fundraise download!

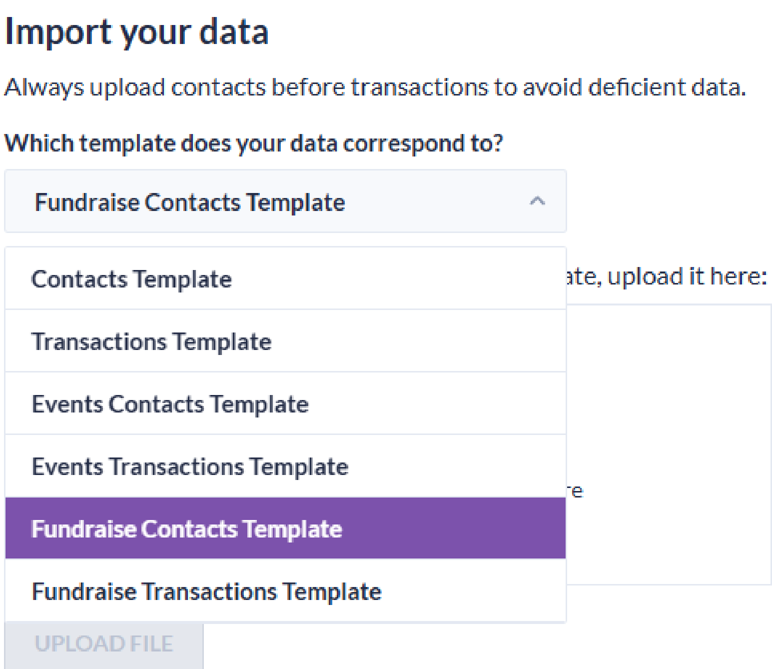
You need to import the contacts first and then the gifts/transactions next. The contact ID from the contacts file is needed so the transaction can be attributed to that contact.

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

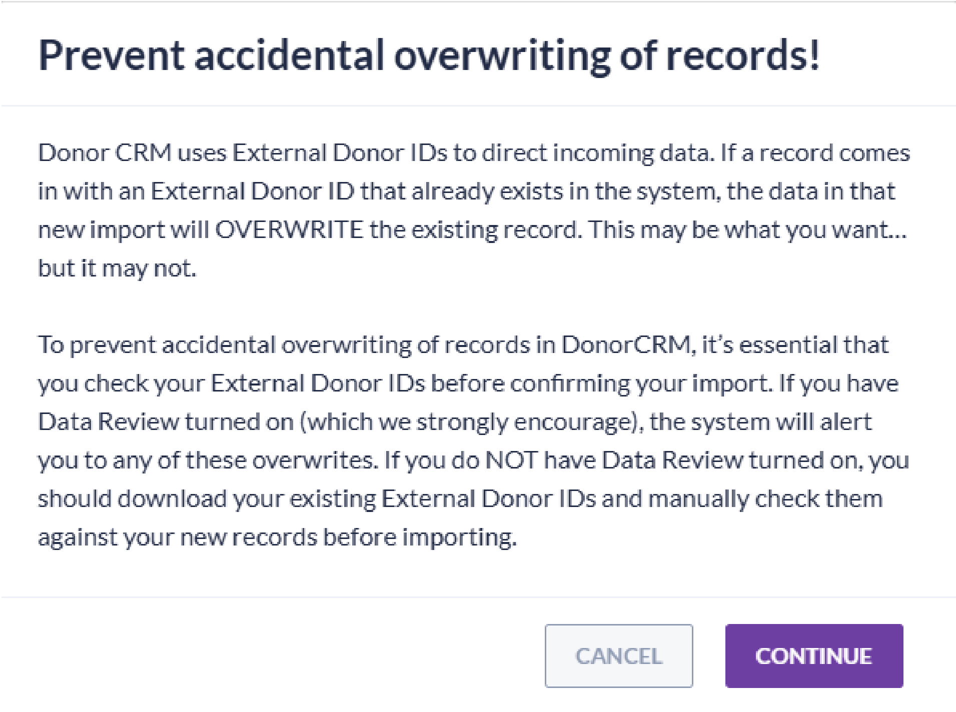


Import Contacts

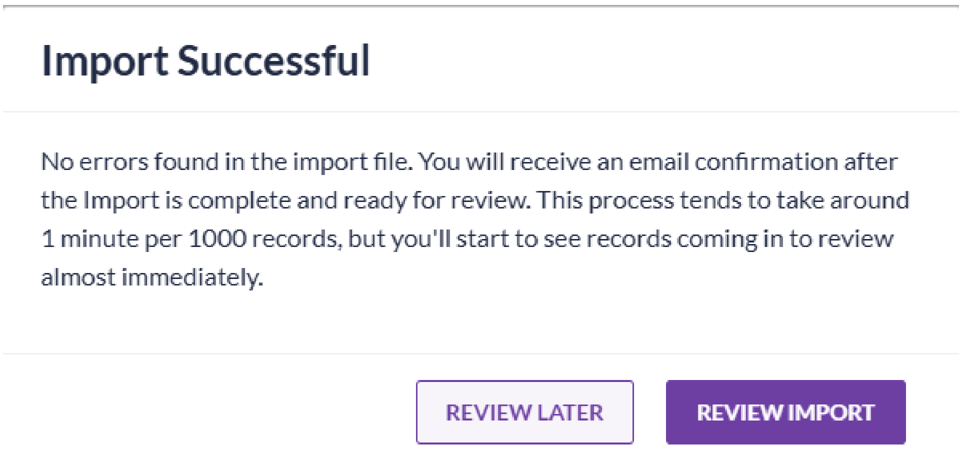
- From the Data Import & Review section, click on **Select a Template dropdown** in the **Import your Data** box and select **Fundraise Contacts Template**



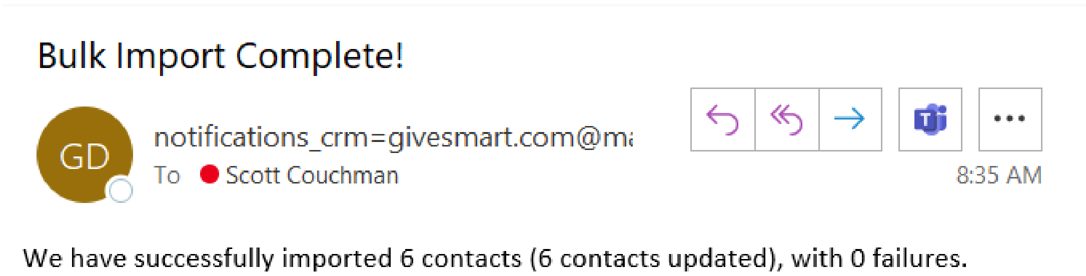
- Browse for your file from your hard drive wherever you saved/downloaded it. For the Contacts import, you want to choose the **donors__####_[date of export].csv** and either drag and drop or click in the **Browse for your File** box to select from your folders.
- Click **Upload File**
- The following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



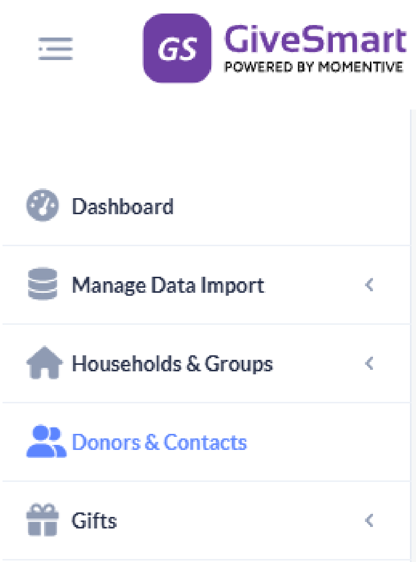
- The upload process will begin and once completed will return the following pop up if successful:



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

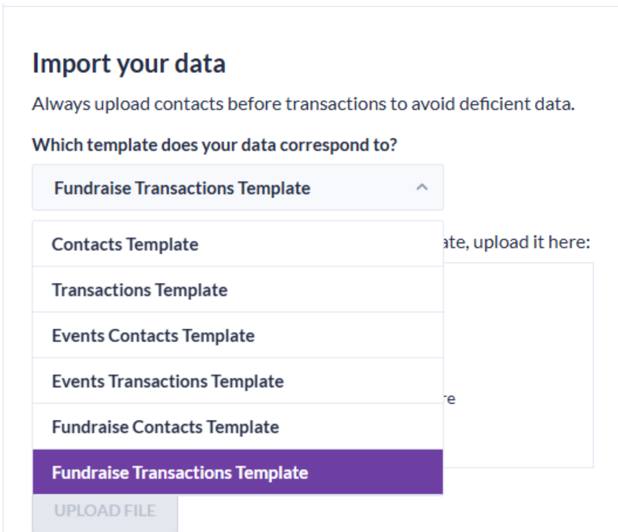


- You can check to see the new contacts in your **Donors & Contact** section

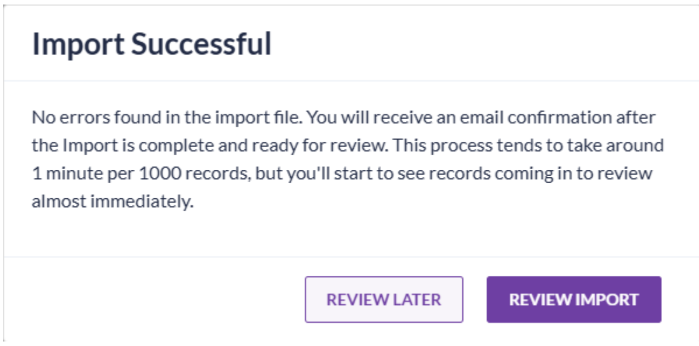


Import Gifts

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



- Browse for your file from your hard drive wherever you saved/downloaded it. For the Contacts import, you want to choose the **txns__####_[date of export].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 pop up:



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

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