

Greater Giving Instructions

TO EXPORT USERS

Please provide GiveSmart with an export of all users 2 days prior to the event. The export that works with GiveSmart’s platform is “A Supporter Export Filtered with Both Members.” Please be sure the export sorts couples, as well as guests’ first and last names, in separate columns.

TO IMPORT AUCTION INFORMATION

Using a PC

1. Go to FILE
2. Select IMPORT DATA
3. Select the CSV file
4. Under the IMPORT DATA INTO area select SALES > click NEXT
5. The fields should automatically matchup (if not you will need to match the fields from the spreadsheet to the fields in the software > click NEXT
6. You can save the settings here if you did manually match the fields > click NEXT
7. If all records are showing a checkmark > click NEXT
	1. If a checkmark is not showing for all records, you will need to click on those records that have red ‘X’ to see what the issue is in order to correct. Or, you can select to remove that row from the import > click NEXT
8. Click FINISH