



***GiveSmart***<sup>®</sup>  
***Donor CRM***

# Import File Specifications

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# Overall Description

GiveSmart Donor CRM allows users to import both contact/donor records (Names, Addresses, Phone numbers, Email addresses, and Custom fields) as well as one or many gift transactions related to each donor (Gift Amount, Gift Date, Solicitation Method, General Ledger, Campaign, Notes, and Custom fields).

To access the import functions, [click on your 'Launchpad' in the system.](#)

Also, GiveSmart Donor CRM offers data conversion services, making sure your data is imported safely and securely. [Data transfer FAQ can be found here.](#)

# Excel Templates

There are two Excel file templates you can use:

## [Donor/Contact Excel Template](#)

- This contact template includes two sample records for an individual and one for an organization (Jon Bidermann and GiveSmart Donor CRM with Jon Biedermann as the contact). Our suggestion is to still include them, but then delete them when you have successfully imported the file.
  - NOTE: The template includes sample custom field examples so that you know how to configure custom fields for each of the five data types (Text, Date, Number, Money, Checkbox (Yes/No), & Dropdown List). Make sure to delete these custom fields (Columns AD-AI) before importing.
- While they are in Excel, you will need to export them as a CSV (Comma Separated Values) files in Excel (using Save As) when you are done using the templates.
- On the second tab at the bottom of the Contact file, there are further instructions on what to look out for and how to save to CSV.

## [Gift/Transaction Excel Template](#)

- The gift file contains six sample gifts.
- **IMPORTANT: You must use the same Donor\_ID you assigned in the first import to all gifts in the gift import file for each gift.** DO NOT use the Contact\_ID's assigned by GiveSmart Donor CRM; ensure you use the Donor\_ID's that you assigned to each contact record when you uploaded the original contact file.

- You can delete these six sample gifts – they are there to provide a guide of how to make sure the data is formatted correctly.

# Contacts

Contacts contain the names, ID's, addresses, phone numbers, email addresses, and custom fields for your constituent records. It is necessary to upload the contacts file first, with the associated DONOR\_ID, before uploading other information related to the DONOR\_ID, such as transactions, activities, etc.

## Fields:

- DONOR\_ID
  - Can be text or numeric – you assign these yourself
  - Example value: 345
  - Required
  - Note: If you are importing gifts, you will need to use this same DONOR\_ID for each gift in the gift file.
- FIRST\_NAME
  - Example value: Jon
- LAST\_NAME
  - Example value: Smith, or GiveSmart Donor CRM if an organization name (See CONTACT\_TYPE below for how to track and organizational record)
  - Required
- CREATED\_AT
  - Example value: 11/19/2010 0:00:00
  - Format: MM/DD/YYYY H:M:S
- TITLE
  - Example value: Mr. & Mrs.
  - Not required
- CONTACT\_TYPE

- This field tells GiveSmart Donor CRM if the record is an individual record or organization record
- Options: I, O
- Not required
- Default: I
- If the record is an organization, then set the contact type to 'O' and set Address1 to the complete name of the contact person at the organization. You can use their professional title in Address2, and the rest of the street address in Address3 and/or Address4. This way, mailing labels and envelopes will print correctly, (In GiveSmart Donor CRM, this is called an 'Address Block' and the system automatically formats the address information to print correctly for physical mailings.)
- SUFFIX
  - Example value: Smith
  - Not required
- BIRTHDAY
  - Example value: 11/19/2018
  - Not required
- FACEBOOK\_PROFILE
  - Not required
- INSTAGRAM\_PROFILE
  - Not required
- TWITTER\_PROFILE
  - Not required
- LINKEDIN\_PROFILE
  - Not required
- ANONYMOUS
  - Options: Y or N
  - Example value: N
  - Not required

- DO\_NOT\_CONTACT
  - Options: Y or N
  - Example value: N
  - Not required
- NOTES
  - A virtually unlimited field to track notes. Please note that if you have carriage returns in your import file, the import file fields MUST be delimited with quotation marks ( " ") for each field in the import file.
  - Not required
- CONTACT\_METHODS\_DICT.HOME\_PHONE
  - Example value: (865) 573-0426
  - Not required
- CONTACT\_METHODS\_DICT.CELL\_PHONE
  - Example value: (865) 573-0426
  - Not required
- CONTACT\_METHODS\_DICT.WORK\_PHONE
  - Example value: (865) 573-0426
  - Not required
- CONTACT\_METHODS\_DICT.EMAIL
  - Example value: [test@test.com](mailto:test@test.com)
  - Not required
- CONTACT\_TAGS
  - Example value: Tag 1, Tag 2, Tag 3
  - Tags separated by a comma and a space
  - Each tag will be created in the Tags field automatically if it does not already exist.
  - Make sure that donors with a common Tag have the Tag name spelled \*exactly\* the same. I.E., if one contact record is tagged with 'Board Member' and another contact record is tagged with 'Board Mmber', the system will treat these as two distinct and separate Tags.



- Not required

## Addresses:

NOTE: Address1 is required. If no address is available, put in 'NO ADDRESS' for Address1 and " " for other required fields.

- ADDRESSES.0.ADDRESS1
- ADDRESSES.0.ADDRESS2
- ADDRESSES.0.ADDRESS3
- ADDRESSES.0.ADDRESS4
- ADDRESSES.0.CITY
- ADDRESSES.0.STATE\_PROVINCE
- ADDRESSES.0.POSTAL\_CODE
- ADDRESSES.0.COUNTRY

If you have more than one address per donor, then you can include additional address fields for the second, third, fourth, etc. complete address. *(Note: None of the additional address fields below are required.)*

- ADDRESSES.1.ADDRESS1
  - ADDRESSES.1.ADDRESS2
  - ADDRESSES.1.ADDRESS3
  - ADDRESSES.1.ADDRESS4
  - ADDRESSES.1.CITY
  - ADDRESSES.1.STATE\_PROVINCE
  - ADDRESSES.1.POSTAL\_CODE
  - ADDRESSES.1.COUNTRY
- 
- ADDRESSES.2.ADDRESS1
  - ADDRESSES.2.ADDRESS2

- ADDRESSES.2.ADDRESS3
- ADDRESSES.2.ADDRESS4
- ADDRESSES.2.CITY
- ADDRESSES.2.STATE\_PROVINCE
- ADDRESSES.2.POSTAL\_CODE
- ADDRESSES.2.COUNTRY

- ADDRESSES.3.ADDRESS1
- ADDRESSES.3.ADDRESS2
- ADDRESSES.3.ADDRESS3
- ADDRESSES.3.ADDRESS4
- ADDRESSES.3.CITY
- ADDRESSES.3.STATE\_PROVINCE
- ADDRESSES.3.POSTAL\_CODE
- ADDRESSES.3.COUNTRY

For any additional addresses, just include an additional block of fields starting with 'ADDRESSES.X' where X is 4, then 5,6,7, etc.

# Custom Fields

## For both the Contact table and Transaction/Gift table

- CUSTOM\_\_YOURFIELDNAME\_\_TYPE
  - (Note: the double hyphen before and after YOURFIELDNAME which the system uses to recognize custom fields)
  - Name: birthday, type: date
    - CUSTOM\_\_BIRTHDAY\_\_date
  - Name: maiden name, type: text
    - CUSTOM\_\_MAIDEN\_NAME\_\_text
  - Name: volunteer, type: checkbox
    - CUSTOM\_\_VOLUNTEER\_\_checkbox
  - Name: volunteer, type: dropdown
    - CUSTOM\_\_VOLUNTEER\_TYPE\_\_dropdown
- Available data types:
  - Text
  - Date
    - Example value: 11/19/2020
    - Format: MM/DD/YYYY
      - Note: including a time stamp in this field will not affect the import process. Only the date will be imported.
  - Number
  - Money
  - Checkbox
    - Options: Y, N
  - Dropdown
    - Example value for contact record #1: 'Part Time'

- Example value for contact record #2: 'Full Time'
- Note: Every distinct value will create an option in the dropdown list, so make sure that the dropdown values for the same thing are spelled EXACTLY the same.

# Import Transactions

In order to import gift transactions successfully, you must first import the Contact file (above) and then repeat the same DONOR\_ID in the contact file for each gift in the Transaction file below.

## Fields

- DONOR\_ID (donor ID previously imported in the CONTACTS file above)
  - Example value: 242
  - If contact not found, the system will assign the gift to the 'anonymous/unknown' donor
  - Make sure that the DONOR\_ID is exactly the same format as the DONOR\_ID originally imported for contacts. I.e.: a DONOR\_ID of 242 = 242 in both files will match up correctly, but 242.0 in the contact file DOES NOT = 242 in the gifts file.
- GIFT\_DATE
  - Example value: 11/19/2018 0:00:00 or 11/19 /2018
  - Not required
- TY\_DATE
  - Example value: 11/19/2018
  - Typically, since you are importing records, you have likely already thanked the donors. If so, then set the TY\_DATE to the same date as the GIFT\_DATE and set THANK\_YOU\_METHOD (below) to 'LETTER\_ONLY'.
  - If you have not thanked these gifts yet, include this in the file and set this to blank/no value, and make sure to set the THANK\_YOU\_METHOD to your choice (see below).
- THANK\_YOU\_METHOD

- Options: LETTER\_ONLY, EMAIL\_ONLY, LETTER\_AND\_EMAIL
- This field is necessary to create thank you records under sent or pending
- Since it's likely you have already thanked these imported donors, set the value of this field to LETTER\_ONLY and set the TY\_DATE to the same date as the gift.
- If you have NOT thanked these donors and want GiveSmart Donor CRM to set them as pending thank you's, then also set the TY\_DATE to blank/empty/no value, but make sure that THANK\_YOU\_METHOD (this field) has one of the three options above.
- GIFT\_AMOUNT
  - Example value: 37.50
  - MUST NOT HAVE CURRENCY SYMBOLS. Numbers with two decimals only.
  - Not required – if not included in the import file, 0.00 will be assigned
- SOLICIT\_NAME
  - Example value: The Headless Hunt
  - Required if this code should be assigned to this transaction
  - Make sure that SOLICIT\_NAMES are spelled exactly the same, i.e. 'Annual Gala' and 'Annul Gala' will generate two separate solicitation methods, so make sure values are spelled exactly the same.
- SOLICIT\_CODE
  - Example value: HH
  - Not required – this is used if you want to track a 'short code' for reach solicitation
- SOLICIT\_CODE\_DESCR
  - Example value: The Headless Hunt is our annual Fall fundraiser for the Wizarding Sports Commission.
  - Not required
- GL\_NAME

- Tracks the general ledger of the gift, such as 'unrestricted' or 'building fund'
- Example value: Building Fund
- Required if this name should be assigned to this transaction
- GL\_CODE
  - Example value: BR
  - Not required – this is used if you want to track a 'short code' for each general ledger
- GL\_CODE\_DESCR
  - Example value: Building Fund description
  - Not required
- CAMPAIGN\_NAME
  - Example value: Annual Campaign
  - Required if this code should be assigned to this transaction
- CAMPAIGN\_CODE
  - Example value: AC
  - Not required
- CAMPAIGN\_CODE\_DESCR
  - Example value: The Annual Campaign is a collection of all of our solicitation methods that help fund our organization on an annual basis.
  - Not required
- NOTES
  - Example value: This gift was originally imported using the GiveSmart Donor CRM import tool by {INSERT YOUR NAME HERE}
  - Can also include other information about the gift which doesn't require an extra field, such as Check No, Reference, etc.
  - Not required
- *Additional custom fields associated with each gift can be added to the Transaction/Gift Import file – [please see 'Custom Fields' section above.](#)*

# Summary

By following these guidelines, you should be able to import your own Contact and Transactions/Gifts into GiveSmart Donor CRM.

If you run into a problem, you can send an email to [support@givesmart.com](mailto:support@givesmart.com) and include your summary error message (automatically emailed to you by the import system after you attempt any import). Depending on the inquiry, we may be able to help, but we will not be able to format or manipulate your data for you without a data conversion service.

Finally, if you make a mistake and need to start from scratch, you can either delete the names by hand, or send an email to [support@givesmart.com](mailto:support@givesmart.com) and we will run a global deletion for you.

GiveSmart Donor CRM offers data conversion services at reasonable prices, making sure your data is imported safely and securely. [Data Transfer FAQ can be found here.](#)

Finally, if you import your own data, you do so at your own risk. GiveSmart Donor CRM cannot be held liable for future problems caused by your own data, or failure to format the data correctly. Again, we can do this for you as part of your contract or for a nominal one-time fee.

Thank you!

Your GiveSmart Donor CRM Team  
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