Exporting Contributions

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Donor Management System

You have the option of exporting all of your Contributions or the results of a simple or Advanced Search.

You can also select which DMS fields you would like to export. This can be useful if you need to export some of your data and import it to QuickBooks, FreshBooks, or another software.

Contributions may be exported for various purposes such as archiving, further analysis, etc.

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Considerations

- Consider if exporting is necessary at all for your current situation.
- It is possible that what you are hoping to achieve with the export can be done from an Advanced Search or a Report.

First Steps

1. Visit the **Contributions Tab**

2. Search for a specific Contribution or select either:

- (1) **The specific Contributions** you wish to export,
- (2) Every listed Contribution **on the page**, or
- (3) All **Contributions** in your search criteria

Select Contacts

3. Select the *Actions* menu at the upper-left side of the Contributions list

4. Select the *Export contributions* option

Select Export contributions

5. Once selected, you will be brought to the **Export Page** which we'll go into detail below .

# Exporting your Contributions

On this page, you can export:

- Every Contribution field, or
- Select Contribution fields.

Export Primary Fields

6. By default, the *Export PRIMARY fields* option will be selected. This will allow you to download all the Contribution fields in the DMS.

Export Primary Fields
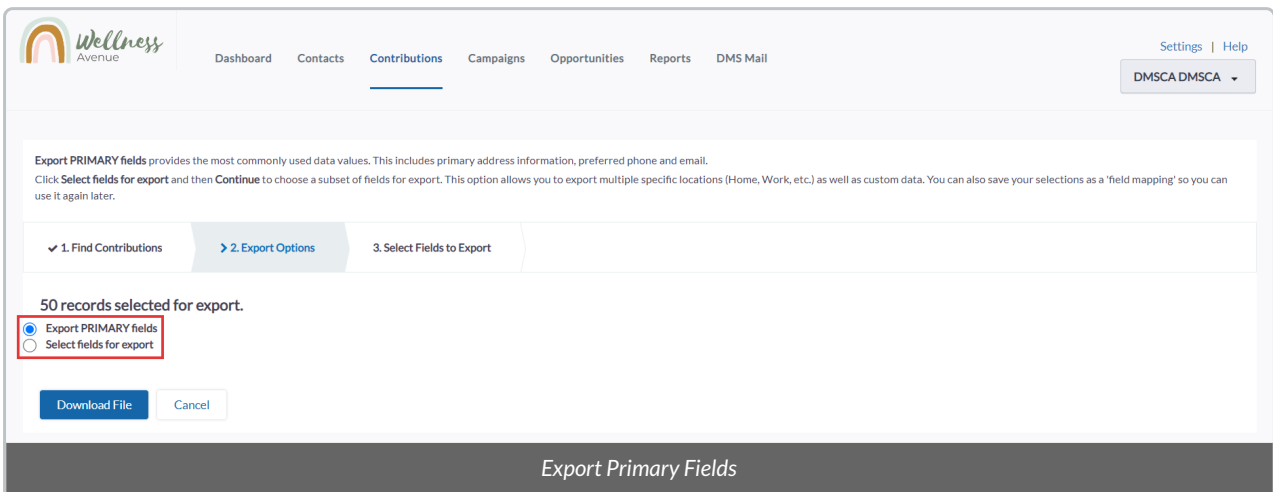
7. Once all your options have been reviewed and selected, proceed by selecting the *Download File* button at the bottom left of the screen.

Download File
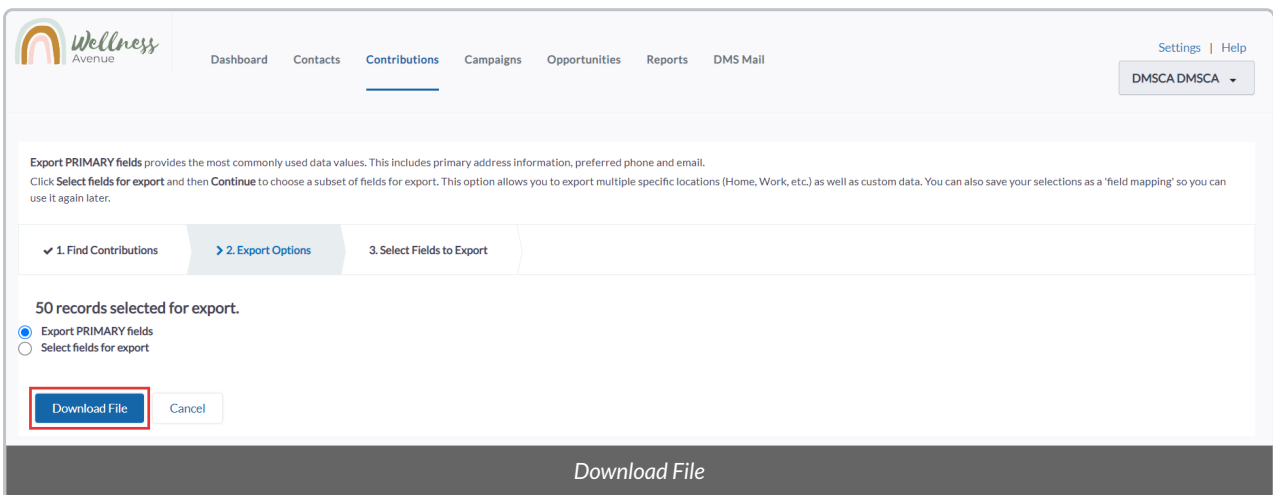
8. The DMS will begin **compiling a list of all your selected Contributions**. This process usually takes a few seconds but may take up to a few minutes, so please do not refresh your page until the process is finished.

9. **The resulting .csv** can be opened with any recent version of Excel, Google Sheets, etc.

Select Fields for Export

6. Select the *Select fields for export* option so you can choose which Contribution fields you'd like to export

Select fields for export

> **Note:** If you'd like to export the same fields in the future, you can save your selection to be used on future exports as *Saved Field Mappings*. Read on to learn more

7. Select your *Use Saved Field Mapping* option if you have saved fields you'd like to export
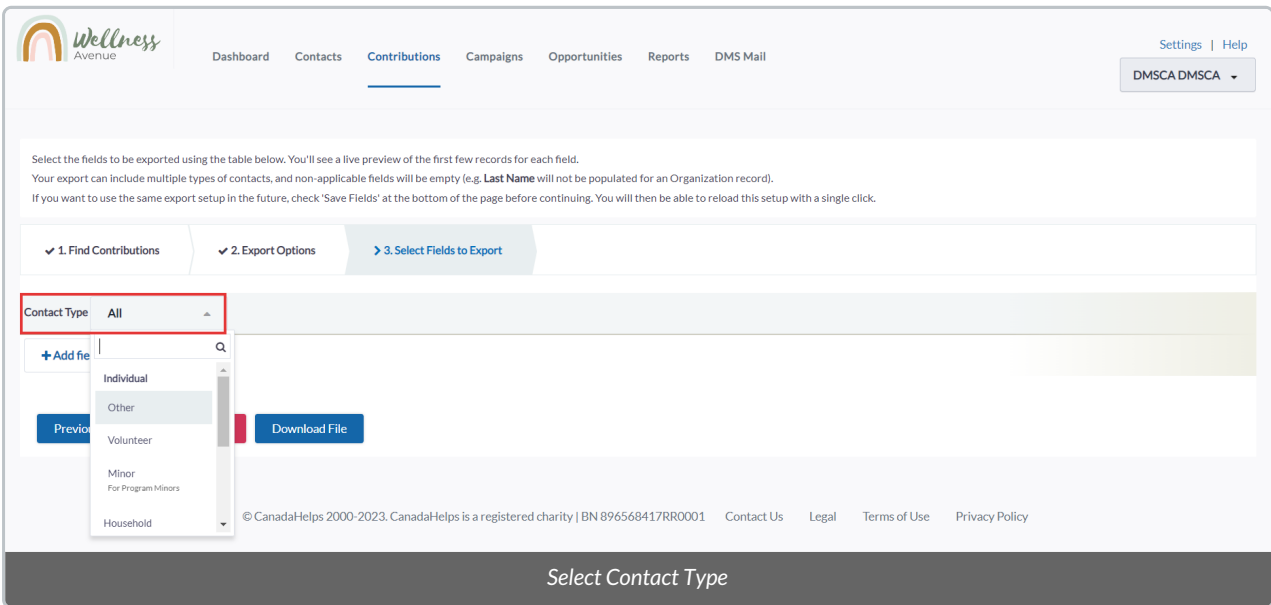

Save preferred export fields with Use Save Field Mapping

8. Once all your options have been reviewed and selected, select *Continue*

Select Continue
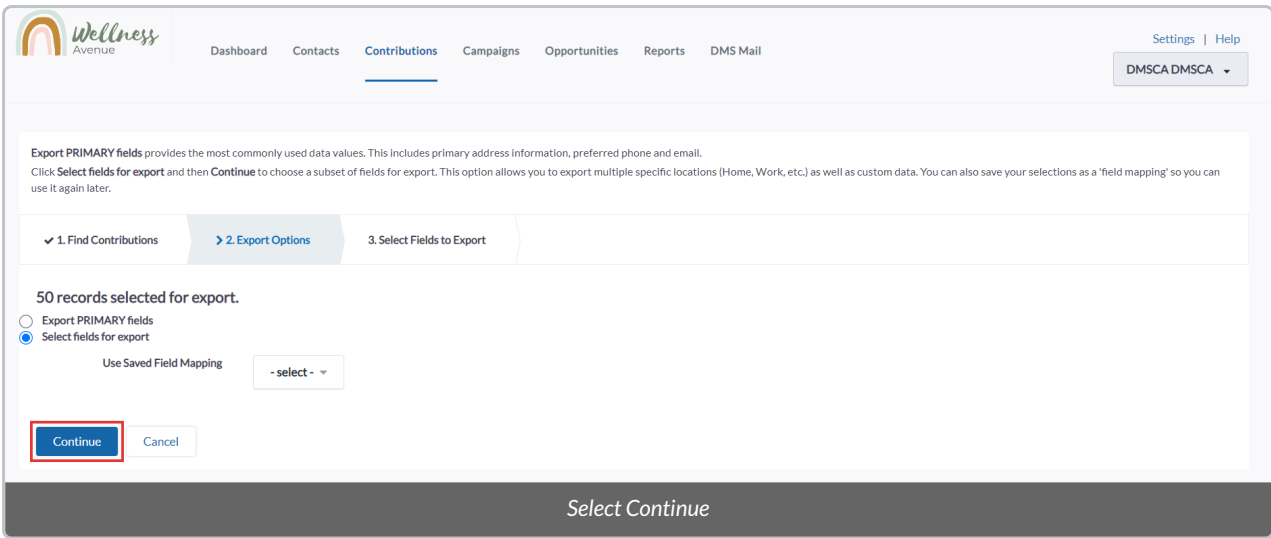
9. On the next page, **select your desired** Contact Type that you'd like to export, or export *All* of them.

Select Contact Type

10. Select *Add field* to choose which fields you'd like to export

Add Field

Note: You can also save your field selections for future use under your *Saved Field Mappings.* You then modify your Saved Field Mappings' Name and Description at anytime.

11. Once all your options have been reviewed and selected, proceed by selecting the *Download File* button at the bottom left of the screen.

Download File to export your desired fields

12. The DMS will begin **compiling a list of all your selected Contributions**. This process usually takes a few seconds

but may take up to a few minutes, so please do not refresh your page until the process is finished.

13. **The resulting .csv** can be opened with any recent version of Excel, Google Sheets, etc.