

# 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

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Search by contributor name or email   Advanced Search

Actions ▾  3 Selected Records Only  All 1430 Records

<input type="checkbox"/>	Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	March 1st, 2023 09:41 AM	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	March 1st, 2023 09:19 AM	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input type="checkbox"/>	March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input type="checkbox"/>	March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
<input checked="" type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912	✓
<input checked="" type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911	✓
<input type="checkbox"/>	February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed		-

Select Contacts

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

4. Select the **Export contributions** option

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Search by contributor name or email   Advanced Search

Actions ▾  50 Selected Records Only  All 1430 Records

- Export Contributions**
- Issue Aggregated Tax Receipts
- Issue Separate Tax Receipts
- Send Thank You

<input type="checkbox"/>	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
<input type="checkbox"/>	Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓
<input checked="" type="checkbox"/>	Alex Fergie	\$100.00	General Fund		DMS Manual	Cheque	Completed	WELL00000913	✓
<input checked="" type="checkbox"/>	March 1st, 2023 01:52 AM	Noboru K	\$1.00	2023	Monthly Giving Webinar	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	
<input checked="" type="checkbox"/>	March 1st, 2023 01:51 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	
<input checked="" type="checkbox"/>	February 28th, 2023 06:30 PM	Nicole Lam	\$250.00	General Fund		DMS Manual	Cheque	Completed	WELL00000912
<input checked="" type="checkbox"/>	February 28th, 2023 03:40 PM	Lucas Froese	\$50.00	General Fund		DMS Manual	Cheque	Completed	WELL00000911
<input checked="" type="checkbox"/>	February 28th, 2023	Nicole Lam	\$150.00	General Fund		DMS Manual	Cheque	Completed	

Select Export contributions

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

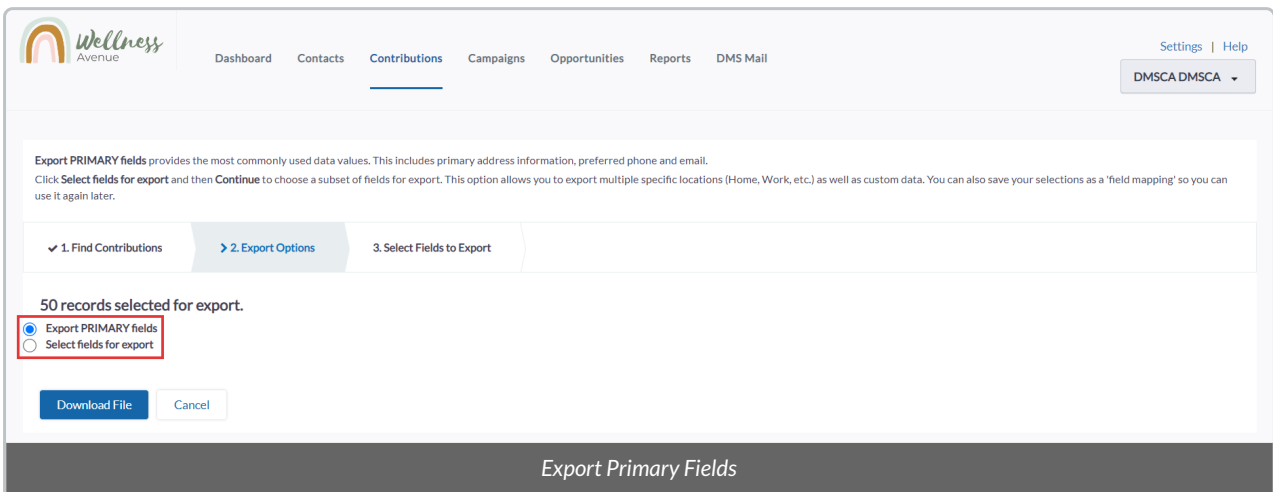
## Exporting your Contributions

On this page, you can export:

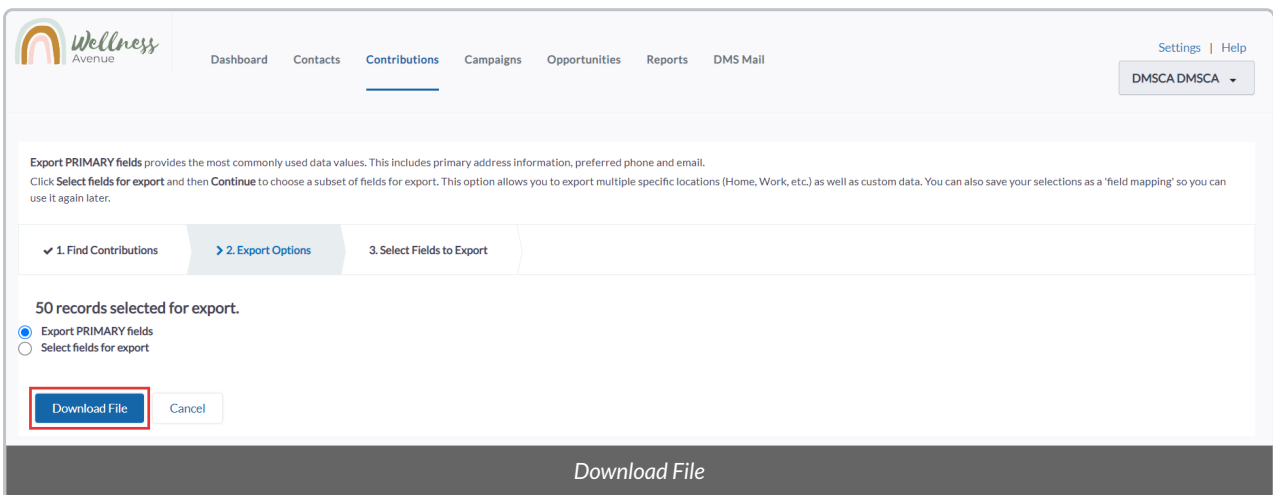
- Every Contribution field, or
- Select Contribution fields.

## 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.



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



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

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Export PRIMARY fields provides the most commonly used data values. This includes primary address information, preferred phone and email.  
Click: **Select fields for export** and then **Continue** to choose a subset of fields for export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

1. Find Contributions > **2. Export Options** > 3. Select Fields to Export

50 records selected for export.

Export PRIMARY fields  
 **Select fields for export**

Use Saved Field Mapping

Continue Cancel

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

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Click: **Select fields for export** and then **Continue** to choose a subset of fields for export. This option allows you to export multiple specific locations (Home, Work, etc.) as well as custom data. You can also save your selections as a 'field mapping' so you can use it again later.

1. Find Contributions > **2. Export Options** > 3. Select Fields to Export

50 records selected for export.

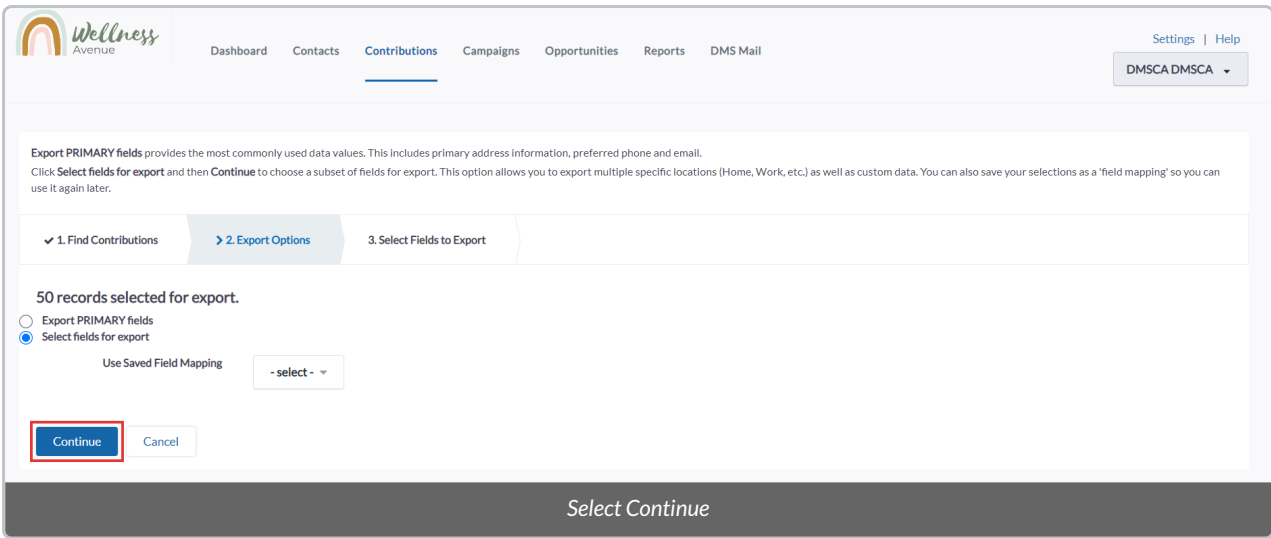
Export PRIMARY fields  
 **Select fields for export**

Use Saved Field Mapping

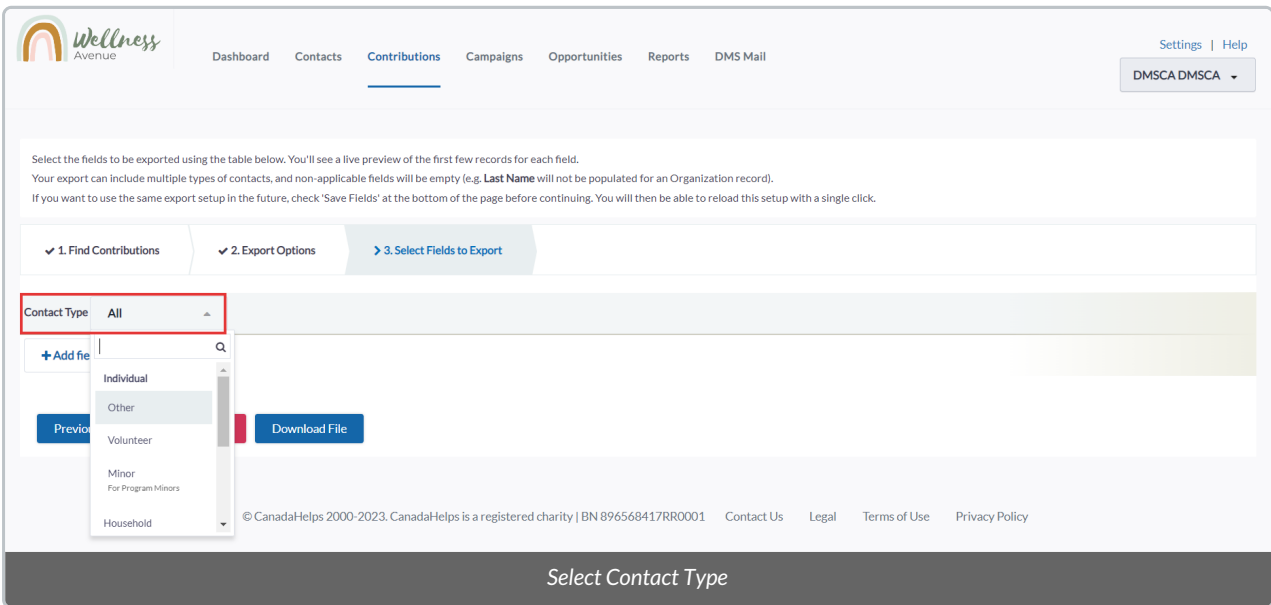
Continue Cancel

Save preferred export fields with Use Save Field Mapping

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



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



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

Select the fields to be exported using the table below. You'll see a live preview of the first few records for each field.  
Your export can include multiple types of contacts, and non-applicable fields will be empty (e.g. **Last Name** will not be populated for an Organization record).  
If you want to use the same export setup in the future, check 'Save Fields' at the bottom of the page before continuing. You will then be able to reload this setup with a single click.

1. Find Contributions    2. Export Options    **3. Select Fields to Export**

Contact Type: All

+ First Name	Noboru	Alex	Krista	Krista
+ Last Name	K	Fergie	Stewart	Stewart
+ Amount of last contri...	50.00	100.00	150.00	150.00
+ Total Amount	50.00	100.00	12345.00	500.00
+ Date Received	2023-03-01 09:41:00	2023-02-23 13:14:00	2023-02-23 13:19:00	2023-02-23 13:19:00

+ Add field    SAVE FIELDS

Previous    Return to Search    Download File

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.

Select the fields to be exported using the table below. You'll see a live preview of the first few records for each field.  
Your export can include multiple types of contacts, and non-applicable fields will be empty (e.g. **Last Name** will not be populated for an Organization record).  
If you want to use the same export setup in the future, check 'Save Fields' at the bottom of the page before continuing. You will then be able to reload this setup with a single click.

1. Find Contributions    2. Export Options    **3. Select Fields to Export**

Contact Type: All

+ First Name	Noboru	Alex	Krista	Krista
+ Last Name	K	Fergie	Stewart	Stewart
+ Amount of last contri...	50.00	100.00	150.00	150.00
+ Total Amount	50.00	100.00	12345.00	500.00
+ Date Received	2023-03-01 09:41:00	2023-02-23 13:14:00	2023-02-23 13:19:00	2023-02-23 13:19:00

+ Add field    SAVE FIELDS

Previous    Return to Search    **Download File**

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.