Tips for Organizing Your Historical Donor Data

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Donor Management System

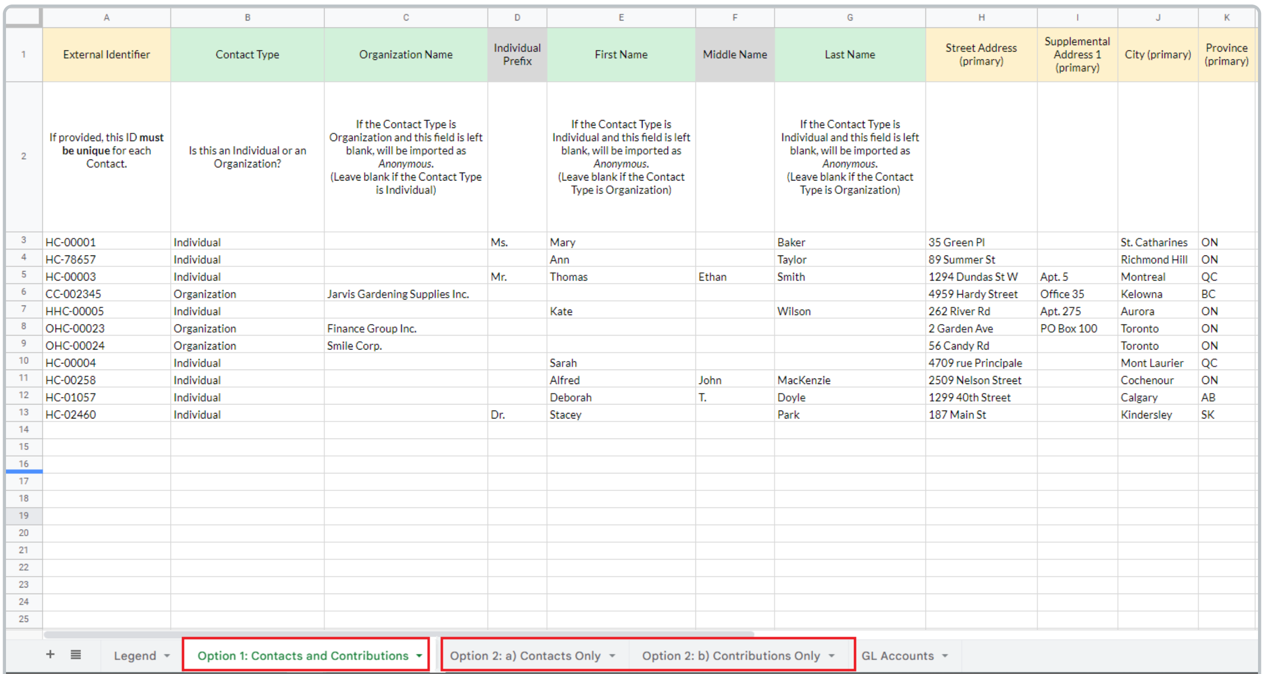
Importing your historical data into your DMS is crucial for getting the full picture of your fundraising. But preparing your donor data for import doesn't have to be a ton of work!

Below are some useful tips for organizing your donor data before submitting it for import. Along with our Template, following these tips will help us map your historical data correctly in your DMS, and help speed up the data migration process.

Table of Contents:

General Tips

- If you can, please submit your data file in **.xlsx format** (so it can be opened with a spreadsheet program like Excel or Google Sheets)
  - Tip: do you have foreign accents in your data? Save your file in **.CSV UTF-8 format** instead!
- Treat each row as a single Contact entry if possible (i.e., include all of a Contact's information in the same row, separated by columns)
- You can submit your information as **either:**
  - One file with **Contacts and Contributions on the same sheet** (see *Option1: Contacts and Contributions* sheet in the Template), OR
  - One file with separate **Contacts** and **Contributions sheets** (see *Option 2a) Contacts Only* and *Option 2b) Contributions Only* sheets in the Template):



External Identifier	Contact Type	Organization Name	Individual Prefix	First Name	Middle Name	Last Name	Street Address (primary)	Supplemental Address 1 (primary)	City (primary)	Province (primary)
If provided, this ID **must be unique** for each Contact.	Is this an Individual or an Organization?	If the Contact Type is Organization and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Individual)		If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)		If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)				
HC-00001	Individual		Ms.	Mary		Baker	35 Green Pl		St. Catharines	ON
HC-78657	Individual			Ann		Taylor	89 Summer St		Richmond Hill	ON
HC-00003	Individual		Mr.	Thomas	Ethan	Smith	1294 Dundas St W	Apt. 5	Montreal	QC
CC-002345	Organization	Jarvis Gardening Supplies Inc.					4959 Hardy Street	Office 35	Kelowna	BC
HHC-00005	Individual			Kate		Wilson	262 River Rd	Apt. 275	Aurora	ON
OHC-00023	Organization	Finance Group Inc.					2 Garden Ave	PO Box 100	Toronto	ON
OHC-00024	Organization	Smile Corp.					56 Candy Rd		Toronto	ON
HC-00004	Individual			Sarah			4709 rue Principale		Mont Laurier	QC
HC-00258	Individual			Alfred	John	MacKenzie	2509 Nelson Street		Cochenour	ON
HC-01057	Individual			Deborah	T.	Doyle	1299 40th Street		Calgary	AB
HC-02460	Individual		Dr.	Stacey		Park	187 Main St		Kindersley	SK

Options for how to organize your data by sheets

Tips for Contacts

1. First Name and Last Names

- First and Last Names are **mandatory**. If any records are missing either of these fields, we'll input the missing value as “Anonymous”

2. External IDs

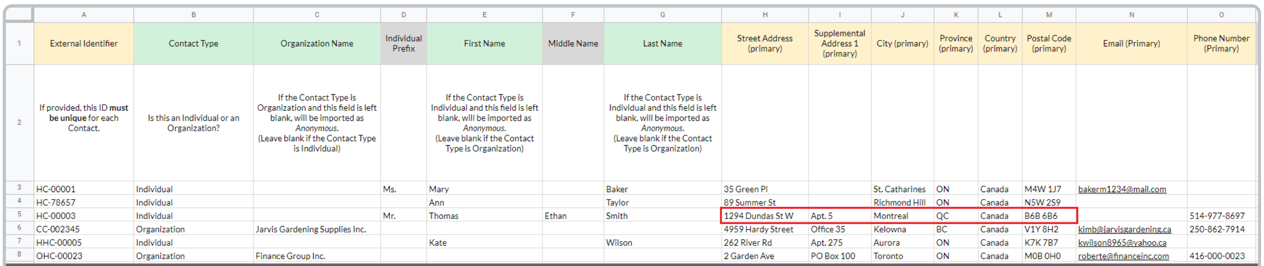
- An External ID is a unique record identifier that is assigned to every one of your Contacts
- If your previous system has already assigned IDs to your Contacts, feel free to provide them. They'll help us identify duplicate Contacts and link any associated Contributions to them
- **If no external IDs are provided,** our Data Team will create one for each Contact

3. Contact Type

- Contacts in the DMS are separated into 2 different types: Individual, Organization
- Please include a **separate column for *Contact Type*** to help us avoid importing contacts under the wrong type (e.g., if an organization has a name that resembles an individual)

4. Personal Contact Details

- Including identifying information (i.e., mailing address, email, phone number) helps our Data Team better spot duplicate Contacts
- Feel free to include the following information for each Contact Type:
    - **Individuals:** Middle Name, Formal Title, Preferred Language (set as English unless specified)
    - **Organizations:** Preferred Language, Address, Email, Phone Phone Extension, Website
- For mailing addresses, please ensure separate columns for each element:
    - Street Address
    - Secondary Address
    - City
    - Province
    - Postal Code
    - Country



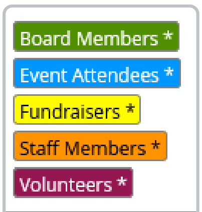
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	External Identifier	Contact Type	Organization Name	Individual Prefix	First Name	Middle Name	Last Name	Street Address (primary)	Supplemental Address 1 (primary)	City (primary)	Province (primary)	Country (primary)	Postal Code (primary)	Email (Primary)	Phone Number (Primary)
2	If provided, this ID **must be unique** for each Contact.	Is this an Individual or an Organization?	If the Contact Type is Organization and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Individual)		If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)		If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)								
3	HC-00001	Individual		Ms.	Mary		Baker	35 Green Pl		St. Catharines	ON	Canada	M4W 1J7	bakerm1234@mail.com	
4	HC-78657	Individual			Ann		Taylor	89 Summer St		Richmond Hill	ON	Canada	N5W 2S9		
5	HC-00003	Individual		Mr.	Thomas	Ethan	Smith	1294 Dundas St W	Apt. 5	Montreal	QC	Canada	B6B 6B6		514-977-8697
6	CC-002345	Organization	Jarvis Gardening Supplies Inc.					4959 Hardy Street	Office 35	Kelowna	BC	Canada	V1Y 8H2	kimb@jarvisgardening.ca	250-862-7914
7	HHC-00005	Individual			Kate		Wilson	262 River Rd	Apt. 275	Aurora	ON	Canada	K7K 7B7	kwilson8965@yahoo.ca	
8	OHC-00023	Organization	Finance Group Inc.					2 Garden Ave	PO Box 100	Toronto	ON	Canada	M0B 0H0	roberte@financeinc.com	416-000-0023

How to best record mailing addresses

Reminder: A Contact's mailing address is required in order to issue them a tax receipt

5. Tags

- Tags are customizable, visual labels for your Contacts; the DMS comes with the below preset Tags:



Preset Tags

- You can add as many other Tags as needed and list them all on the same line for each Contact:

Q	R	S	T	U	V	W
Related Contact	Relationship Type (of Related Contact)	Related Contact Job Title	Related Contact 2	Relationship Type 2 (of Related Contact 2)	Contact Tag/s	Contact Notes
Related Contacts will be imported as a separate Contact (Individual).	See below for example Relationship Types. **Note:** if you've added a Related Contact but haven't specified a Relationship Type, we'll simply mark the Related Contact as a generic "Related to".	If you'd like to provide other details for Related Contacts (e.g., address, phone number, job title, notes), simply create new columns such as this one.	If a single Contact has multiple Relationships, you can create new columns (like this one) as required.		**Preset DMS Tags:** Board Member, Volunteer, Event Attendees, Fundraiser, Staff Members. Choose from above and/or list any other applicable Tags. Leave Blank if n/a.	Include any/all relevant notes here.
						Has a dog
Kevin Taylor	Spouse		Cameron D. Taylor	Son	Board Member, Volunteer	Allergic to peanuts
Agatha Smith	Family Member	Artist	Amy Smith	Daughter	Volunteer	
Kim Brown	Main Contact	COO				
Mark Wilson	Spouse				Event Attendees, Gold Membership	
Robert Evans	Main Contact					Contact between 9am-5pm EST
Dr. Francis Sanders	Owner	Orthodontist			Sponsor, Volunteer, Platinum Donor	Closed on Mondays
Thomas	Spouse					
Valerie Laroche	Coworker	Finance Manager	Beverly Owen	Coworker	Volunteer	Employee fundraises

How to list multiple Tags

6. Privacy Preferences

- You can also provide information on privacy specifications (e.g., Do not email, Do not phone, Do not mail).
- Contacts with no specified Privacy requests will be input without any privacy preferences (don't worry, you can update these details in your DMS at anytime):

W	X	Y	Z	AA	AB	AC	AD
Contact Notes	Membership note	Preferred Language	Preferred Communication Method	Do Not Email	Do Not Mail	Do Not Phone	Deceased
Include any/all relevant notes here.	Include all necessary information (start/end date, membership type, status, description).	Default is English (Canada), (Format also accepted: en_CA, fr_CA) Leave Blank if unknown.	Leave Blank if unknown.	Mark "Yes" if applicable. (Leave Blank if n/a)	Mark "Yes" if applicable. (Leave Blank if n/a)	Mark "Yes" if applicable. (Leave Blank if n/a)	Mark "Yes" if applicable. (Leave Blank if n/a)
Has a dog		English	Postal Mail				
Allergic to peanuts		en_CA	Do not contact	Yes	Yes	Yes	
		French	Phone	Yes	Yes		
		fr_CA	Email				
	Family: 1/1/20 - 12/31/21	English	Postal Mail			Yes	
Contact between 9am-5pm EST		English	Email		Yes	Yes	
Closed on Mondays							
	Individual: 1/1/20 - 12/31/20	English	Email				

Example: A 'Yes' under 'Do not phone' means no telephone communication

7. Relationship Information

- You can include relevant relationships for any Contact under the *Relationship Type* column (e.g., “Employer”, “Employee of”, “Spouse of”, "Sibling of", "Partner of")
- You can then list the full name (or External ID, if applicable) of the related individual under the adjoining *Related Contact* column
- You can also add new columns with relevant details about a Related Contact (e.g., job title, address, notes)
- If one Contact has multiple relationships, you can add additional columns as needed:

Q	R	S	T	U	V
Related Contact	Relationship Type (of Related Contact)	Related Contact Job Title	Related Contact 2	Relationship Type 2 (of Related Contact 2)	Contact Tag/s
Related Contacts will be imported as a separate Contact (Individual).	See below for example Relationship Types. **Note:** if you've added a Related Contact but haven't specified a Relationship Type, we'll simply mark the Related Contact as a generic "Related to".	If you'd like to provide other details for Related Contacts (e.g., address, phone number, job title, notes), simply create new columns such as this one.	If a single Contact has multiple Relationships, you can create new columns (like this one) as required.		**Preset DMS Tags:** Board Member, Volunteer, Event Attendees, Fundraiser, Staff Members. Choose from above and/or list any other applicable Tags. Leave Blank if n/a.
Kevin Taylor	Spouse		Cameron D. Taylor	Son	Board Member, Volunteer
Agatha Smith	Family Member	Artist	Amy Smith	Daughter	Volunteer
Kim Brown	Main Contact	COO			
Mark Wilson	Spouse				Event Attendees, Gold Membership
Robert Evans	Main Contact				
Dr. Francis Sanders	Owner	Orthodontist			Sponsor, Volunteer, Platinum Donor
Thomas	Spouse				
Valerie Laroche	Coworker	Finance Manager	Beverly Owen	Coworker	Volunteer

How to list multiple Relationships

8. Contact Notes

- Use the *Contact Notes* column to include any notes relevant to a Contact that don't otherwise have a dedicated place in the Template (based on the columns available)
  - If our Data Team can suggest a better location for the information in the DMS, we'll let you know!

Tips for Contributions

1. Dates Received

- The Date Received (including month, date, and year) is a **mandatory** field for all Contributions
- If you don't know the date associated with a Contribution, you can either:
  - Set the date as the day of a specific event/campaign (for Contributions associated with said event/campaign)
  - Add a temporary date (e.g. set all non-dated contributions in 2022 as of 01/01/2022), and adjust them later
  - Remove the Contributions with no dates and import them at a later time when you know this information
- Make sure all of your dates follow a consistent format to avoid confusion (e.g., 01/02/2020 can be interpreted as January 2nd, 2020 *or* February 1st, 2020).

AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO
Transaction ID	Contribution Amount	Date Received	Payment Method	Campaign Name	Fund	Fee	Non-Deductible Amount	GL Account	In Honour Name	In Memory Name
If provided, this identifier **must be unique** for each transaction.	Total amount of a **single** contribution.	If blank: contribution will not be imported. Please ensure dates follow a consistent format.	If blank: will be imported as "Other"	If blank: will be imported as "General Campaign"	If blank: will be imported as "General Fund". **Note:** if any contributions were gifted In Kind, Fund should be "In Kind"	Amount of processing fees (if applicable).	Is there an advantage amount? Leave blank if n/a or unknown.	If you'll be providing GL codes, please also include them in a separate sheet (see "GL Accounts" sheet below).		
HT-00001	25	8/30/2017	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200		Beth Smith
HT-00002	25	5/31/2018	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200	Martha Green	
HT-00003	100	4/9/2019	Cash	General Campaign	General Fund			4200		
HT-00004	1,200.00	7/9/2019	Cheque	General Campaign	General Fund		480.00	4200		
MDD-00001	500	3/21/2020	Etransfer	Buy a Book	Education Fund	20.00		1100	Angela Wing	
MDD-00002	2,000.00	4/12/2020	Cash	Buy a Book	Education Fund		1,980.00	1100		
MDD-00003	300	12/7/2020	In Kind	In Kind	In Kind			4300		
HT-00005	250	12/26/2020	Credit Card	General Campaign	General Fund	1		4200		

Make sure to include a 'Date Received' for all Contributions (following a consistent format)

2. Transaction IDs

- Similar to a Contact's *External ID*, the Transaction ID is a unique record identifier that is assigned to each *transaction*
- Feel free to provide transaction IDs if these have been assigned by your previous system
- If you've been recording your data manually and haven't assigned Transaction IDs, don't worry! Our Data Migration Team will create one for each Contribution.

3. Total Contribution Amounts

- Keep in mind that the *Contribution Amount* column refers to the **total amount for a single donation**, rather than the all-time amount gifted by a specific donor

> **Reminder**: The DMS will automatically calculate *Year-To-Date* and *Total Lifetime Amounts* on each Contact's Summary page, so you don't need to worry about providing this information.

4. Campaigns and Funds

- **Campaigns** are your online or offline fundraising appeals. They indicate **where a donation has come through** (e.g., a gala, a walk-a-thon, a direct mail campaign)
- **Funds** allow you to record where each donation will be allocated once received by your organization. They indicate **where a donation will be directed to** (e.g. Operating Fund, After School Program Fund, Emergency Supplies Fund)
- By default, your DMS comes with a preset *General Fund* and an *In-Kind Fund*, but you can create an unlimited number of DMS Funds
  - Contributions from the same Campaign may be directed to different Funds (example below)
- If you have Contributions with no set fund/campaign, feel free to label them as "General Fund" or "General

Campaign" and update them later

AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN
Transaction ID	Contribution Amount	Date Received	Payment Method	Campaign Name	Fund	Fee	Non-Deductible Amount	GL Account	In Honour Name
If provided, this identifier **must be unique** for each transaction.	Total amount of a **single** contribution.	If blank: contribution will not be imported. Please ensure dates follow a consistent format.	If blank: will be imported as "Other"	If blank: will be imported as "General Campaign"	If blank: will be imported as "General Fund". **Note:** if any contributions were gifted In Kind, Fund should be "In Kind"	Amount of processing fees (if applicable).	Is there an advantage amount? Leave blank if n/a or unknown.	If you'll be providing GL codes, please also include them in a separate sheet (see "GL Accounts" sheet below).	
HT-00001	25	8/30/2017	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200	
HT-00002	25	5/31/2018	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200	Martha Green
HT-00003	100	4/9/2019	Cash	General Campaign	General Fund			4200	
HT-00004	1,200.00	7/9/2019	Cheque	General Campaign	General Fund		480.00	4200	
MDD-00001	500	3/21/2020	Etransfer	Buy a Book	Education Fund	20.00		1100	Angela Wing
MDD-00002	2,000.00	4/12/2020	Cash	Buy a Book	Education Fund		1,980.00	1100	
MDD-00003	300	12/7/2020	In Kind	In Kind	In Kind			4300	
HT-00005	250	12/26/2020	Credit Card	General Campaign	General Fund	1		4200	

How to record Campaigns and Funds

---> Learn more about Campaigns and Funds in your DMS

5. Receipt Information

- For those contributions which have already been issued a tax receipt, wherever possible, please including any relevant receipt information, such as receipted date and receipt number (which should be unique to each Contact)
- If your data includes any Contributions that **haven't been receipted yet** (but for which you'd like to issue a tax receipt through the DMS), make sure to **add a 'No' in the *'Is Tax Receipted?'* column**:

Is Tax Receipted?	Receipt Number	
No		*We'll mark the Contribution as **eligible** for a DMS tax receipt (i.e., not yet receipted)
Yes	RC0000012	*We'll mark the Contribution as **ineligible** for a tax receipt through the DMS

6. Multiple Contributions Per Contact

If you're including your Contact and Contribution data in the same sheet, and a single Contact has made more than one Contribution, simply list the different Contributions as separate rows for that Contact. In this case, you can either:

- Duplicate the entire row for that Contact and update the information for each Contribution they've made;

Or

- If you're using **External Identifiers**, duplicate the row but only include the External Identifier for that Contact (example below). You can then update the information for each Contribution they've made:

External Identifier	Contact Type	Organization Name	First Name	Last Name	Street Address (primary)	City (primary)	Province (primary)	Country (primary)	Postal Code (primary)	Email (Primary)	Phone Number (Primary)	Job Title	Employer
If provided, this ID **must be unique** for each Contact.	Is this an Individual or an Organization?	If the Contact Type is Organization and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Individual)	If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)	If the Contact Type is Individual and this field is left blank, will be imported as *Anonymous*. (Leave blank if the Contact Type is Organization)								Employers will be imported as a separate Contact (Organization).	
HC-00001	Individual		Mary	Baker	35 Green Pl	St. Catharines	ON	Canada	M4W 1J7	bakerm1234@mail.com		Administrator	Summer Corp.
HC-78657	Individual		Ann	Taylor	89 Summer St	Richmond Hill	ON	Canada	N5W 2S9			Chief Executive Offic	Taylor Media Group
HC-78657													
HC-00003	Individual		Thomas	Smith	1294 Dundas St W	Montreal	QC	Canada	B6B 6B6		514-977-8697		
CC-002345	Organization	Jarvis Gardening Supplies Inc.			4959 Hardy Stree	Kelowna	BC	Canada	V1Y 8H2	kimb@jarvisgardeni	250-862-7914		
HHC-00005	Individual		Kate	Wilson	262 River Rd	Aurora	ON	Canada	K7K 7B7	kwilson8965@yahoo.ca		Teacher	Toronto District Sch
OHC-00023	Organization	Finance Group Inc.			2 Garden Ave	Toronto	ON	Canada	M0B 0H0	roberte@financeinc	416-000-0023		
OHC-00024	Organization	Smile Corp.			56 Candy Rd	Toronto	ON	Canada	M2M 2M2	info@smilecorp.com	312-001-7676		
HC-00004	Individual		Sarah	Tweed	4709 rue Principa	Mont Laurier	QC	Canada	J9L 3G8	saraht03@gmail.cor	819-513-5366		
HC-00258	Individual		Alfred	MacKenzie	2509 Nelson Stree	Cochenour	ON	Canada	P0V 1L0	alfred1960@yahoo.	807-662-3142		
HC-01057	Individual		Deborah	Doyle	1299 40th Street	Calgary	AB	Canada	T2J 0N5	doyled@cadstudio.c	403-278-0362	Accountant	Cad Studio
HC-02460	Individual		Stacey	Park	187 Main St	Kindersley	SK	Canada	S0L 1S0	s.park@gmail.com	306-512-284		

External Identifier	Related Contact	Relationship Type (of Related Contact)	Contact Tag/s	Contact Notes	Preferred Language	Transaction ID	Contribution Amount	Date Received	Payment Method	Campaign Name	Fund
	Related Contacts will be imported as a separate Contact (Individual).	See below for example Relationship Types. **Note**: if you've added a Related Contact but haven't specified a Relationship Type, we'll simply mark the Related Contact as a generic "Related to".	**Preset DMS Tags:** Board Member, Volunteer, Event Attendees, Fundraiser, Staff Members. Choose from above and/or list any other applicable Tags. Leave Blank if n/a.	Include any/all relevant notes here.	Default is English (Canada), (Format also accepted: en_CA, fr_CA) Leave Blank if unknown.	If provided, this identifier **must be unique** for each transaction.	Total amount of a **single** contribution.	If blank: contribution will not be imported. Please ensure dates follow a consistent format.	If blank: will be imported as "Other"	If blank: will be imported as "General Campaign"	If blank: will be imported as "General Fund". **Note**: if any contributions were gifted In Kind, Fund should be "In Kind"
HC-00001				Has a dog	English	HT-00001	25	8/30/2017	Credit Card	Summer Festival Even	Supporting Young Talent
HC-78657	Kevin Taylor	Spouse	Board Member, Vo	Allergic to peanuts	en_CA	HT-00002	25	5/31/2018	Credit Card	Summer Festival Even	Supporting Young Talent
HC-78657						HT-00003	85	12/27/2018	Cheque	Holiday Hero	General Fund
HC-00003	Agatha Smith	Family Member	Volunteer		French	HT-00004	100	4/9/2019	Cash	General Campaign	General Fund
CC-002345	Kim Brown	Main Contact			fr_CA	HT-00005	1,200.00	7/9/2019	Cheque	General Campaign	General Fund
HHC-00005	Mark Wilson	Spouse	Event Attendees, Gold Membership		English	MDD-00001	500	3/21/2020	Etransfer	Buy a Book	Education Fund
OHC-00023	Robert Evans	Main Contact		Contact between 9a	English	MDD-00002	2,000.00	4/12/2020	Cash	Buy a Book	Education Fund
OHC-00024	Dr. Francis Sander	Owner	Sponsor, Voluntee	Closed on Mondays		MDD-00003	300	12/7/2020	In Kind	In Kind	In Kind
HC-00004	Thomas	Spouse			English	HT-00006	250	12/26/2020	Credit Card	General Campaign	General Fund
HC-00258											
HC-01057	Valerie Laroche	Coworker	Volunteer	Employee fundraises							
HC-02460											

Listing multiple Contributions made by a single Contact ***(using External IDs)***

7. GL Account Information

- GL Accounts in the DMS are records used to arrange how the money stored in Funds are being transmitted to your General Ledger and Balance Sheet
- If you'd like, you can include historical GL account information with your data by **adding a *GL Account* column**, as well as a corresponding ***GL Accounts* sheet** with more details:

Transaction ID	Contribution Amount	Date Received	Payment Method	Campaign Name	Fund	Fee	Non-Deductible Amount	GL Account
If provided, this identifier **must be unique** for each transaction.	Total amount of a **single** contribution.	If blank: contribution will not be imported. Please ensure dates follow a consistent format.	If blank: will be imported as "Other"	If blank: will be imported as "General Campaign"	If blank: will be imported as "General Fund". **Note:** if any contributions were gifted In Kind, Fund should be "In Kind"	Amount of processing fees (if applicable).	Is there an advantage amount? Leave blank if n/a or unknown.	If you'll be providing GL codes, please also include them in a separate sheet (see "GL Accounts" sheet below).
HT-00001	25	8/30/2017	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200
HT-00002	25	5/31/2018	Credit Card	Summer Festival Event	Supporting Young Talents	1.00		1200
HT-00003	100	4/9/2019	Cash	General Campaign	General Fund			4200
HT-00004	1,200.00	7/9/2019	Cheque	General Campaign	General Fund		480.00	4200
MDD-00001	500	3/21/2020	Etransfer	Buy a Book	Education Fund	20.00		1100
MDD-00002	2,000.00	4/12/2020	Cash	Buy a Book	Education Fund		1,980.00	1100
MDD-00003	300	12/7/2020	In Kind	In Kind	In Kind			4300
HT-00005	250	12/26/2020	Credit Card	General Campaign	General Fund	1		4200

nd ▾ | Option 1: Contacts and Contributions ▾ | Option 2: a) Contacts Only ▾ | Option 2: b) Contributions Only ▾ | GL Accounts ▾

Importing GL information

- In your ***GL Accounts* sheet,** feel free to provide our team with the below details:
  - ***Name (mandatory):*** e.g. *General*
  - ***GL Code (mandatory):*** e.g. *4200*
  - ***Account Type:*** only if you are including non-Revenue Accounts.
  - ***Description***
  - ***Funds Associated*** (mandatory): which Fund is associated with **each** GL Account
  - ***Contributions Associated*** (mandatory): which of your Contributions are associated with the included GL Accounts

What Information is Excluded in the Migration?

1. CanadaHelps Contributions

- Don't worry, any donations received through CanadaHelps (**within the past 5 years**) will be migrated shortly after your Kick-Off call.

2. Negative Contribution Amounts (contributions less than $0)

3. Information directly related to a previous system (e.g., *Last Modified Date, Last Updated By, Added By)*

4. Contribution Statistics

- Your DMS will automatically calculate Contribution statistics based on the data provided (i.e., **last Contribution amount and date, second last Contribution amount and date, all-time total Contribution amounts**) and display it under a Contact's Profile.

Most Common Setbacks

1. Unclear Voided Contributions

- Please label any Contributions that have been cancelled, refunded, or voided. We'll mark these as *Cancelled* so that you can still track them in your DMS.

2. Missing Received Dates

- Remember, Contributions can't be imported without a received date (see *Tips for Contributions* above).

3. Lump-Sum Contribution Amounts vs. Individual Contribution Amounts

- As a reminder, the DMS will calculate *Year-To-Date* and *Total Lifetime* amounts on each Contact's Summary page, so there's no need to include lump-sum Contribution amounts. Just make sure you're providing clear individual amounts and dates for all Contributions.

4. Unidentified/Ambiguous Relationships Between Funds and GL Accounts

- .In the DMS, every Fund automatically creates a corresponding GL account (e.g., Gala Fund > Gala Fund GL Account)
    - But, you can instead map a Fund to another existing GL account (e.g., Gala Fund > **General Fund GL Account**)

- **Note**: a Fund can only be mapped against a single GL Account, but a single GL Account may have multiple Funds within it.

Final Step: Submitting Your Data

So, you've finished preparing your historical data based on the Data Migration Template and the tips above? Hooray!

You're now ready to submit your data file to our team using **our secure form**.

You'll see a confirmation screen letting you know that everything was submitted successfully, and then our Data Team will get to work! If our Data Experts have any questions about your data, your Onboarding Specialist will reach out to you directly.

What's Next?

While we work on importing your historical data, **check out our awesome training webinars** and start learning how to perform key functions in your DMS.