Importing Your Donor Data

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Donor Management System

Does your charity receive gifts outside of CanadaHelps? And have you been managing this donor data through another CRM? Or maybe you've been tracking it using spreadsheets? No matter the case, if you have donor data you'd like to bring into your new DMS, you're in the right place!

Find out how our team will migrate your donor data into the DMS for you during your Onboarding, and learn how you can help make it a quick and easy process.

Table of Contents:

Why Import Your Data?

Your charity probably receives donations outside of CanadaHelps from time to time, such as cash, cheques, e-transfers or gifts-in-kind. No matter how you track this donor data (i.e., through another CRM or spreadsheets), **we refer to any pre-DMS, non-CanadaHelps data as your *historical data*.** And, you'll want to have all of this historical data imported into your new DMS so that you can see the complete picture of your fundraising, and steward all of your donors, participants, prospects, volunteers, etc., in one place.

That's where the donor data migration comes in: **our Data Team takes your historical data and makes sure it's properly mapped out and ready for you to use in the DMS.**

But, because the DMS has specific naming requirements that have to be met in order for us to be able to bring in your data, you can help ensure a smooth (and quicker!) import by referencing our **Data Migration Template** when you start to prepare your data.

What Should Be Imported?

Great question! And something that you should definitely ask yourself as you get to work on organizing your historical data. After all, to get the most out of your new DMS, you'll want to make sure you're importing only the most relevant, useful donor data.

Here are a couple of guiding questions if you're unsure whether to have something imported:

- Why is a specific data point important? Is it relevant for fundraising, prospecting, communications, stewardship etc.?
- Based on the columns in the Data Migration template, is there a logical place for it in the DMS? (If you're unsure, don't worry! Our data team can help.)

Also, in an effort to migrate only the most pertinent donor information, we often recommend only importing **between 2-5 years' worth of historical data**, because anything older is (usually) considered to be an unengaged donor (with potentially outdated information).

That said, it's still good practice to keep a copy of all historical donor data somewhere (bonus points if it's backed up in the cloud!). You just might not need to work with these older records in your day-to-day.

Your CanadaHelps Data

As a reminder, all of your CanadaHelps data syncs automatically with the DMS on a daily basis (around 6 am EST). This means **you don't have to worry about providing us with any CanadaHelps donor/donation information**

We'll take all of your donor, donation, and campaign data that has come through CanadaHelps **within the past 5 years** and import it for you into your DMS in the first few days of your Onboarding, so you can start managing this information in your DMS right away!

---> Learn more about exactly what information syncs from your CanadaHelps tools

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Extracting Your Historic Data

Charities who need to import donor data into the DMS fall into two buckets: those **using an existing CRM** (customer relationship manager) and those **not currently using one**.

Using a CRM

Your charity might be receiving offline gifts (i.e., cash, cheques, e-transfers, in-kind gifts), as well as online donations which you've been recording and managing in another CRM software. If this is the case, you'll just need to export from your current platform any of the data that you want to see in the DMS.

Depending on your CRM, the steps for extraction may differ slightly. But no matter the system, it'll likely involve:

- Using your CRM's **data export function** (in some cases, this might just be a report/s you can download)
- Selecting which **values** (first/last names, donation amount, campaigns etc.) you want to export

- Selecting a **date range** for the data that you need (remember: within 2-5 years is usually best!)
- Saving your data file as **an .xlsx file** - this'll allow you to open it in a spreadsheet program
    - Tip: do you have foreign accents in your data? Save your file in**.CSV UTF-8 format** instead!

If you run into any speed bumps during this data extraction, we always recommend first reaching out to your existing provider for support, since they'll be most familiar with your current system.

Not Using a CRM

It's possible that your charity receives offline gifts (i.e., cash, cheques, e-transfers, in-kind gifts) but you don't currently use a fundraising software to manage them. You might instead be tracking all of your donor, constituent, volunteer etc. data in one (or more!) spreadsheets.

In this case, you'll want to keep in mind:

- If you have donor data spread out across multiple sources, **consolidate everything** into one file - it'll be much easier to organize your historic data if you're not jumping between multiple spreadsheets
- Save your consolidated data file as **an .xlsx file** - this'll allow you to open it in a spreadsheet program
    - Tip: do you have foreign accents in your data? Save your file in**.CSV UTF-8 format** instead!

No matter which of these two buckets your charity falls into, once you have your data files in hand, organizing them doesn't need to be hard! In fact, our **Data Migration Template** will help you sort through and easily label your data to get it ready for import.

Data Migration Template

Organizing your donor data doesn't have to be a lot of work. We simply want to avoid any delays or incorrect mapping when importing your donor data into the DMS. That's why we created a handy **Data Migration Template** that you can use as a guide when preparing your historic data.

Click here to download the Data Migration Template

(can be opened with any spreadsheet program such as Excel or Google Sheets)

How should I use the Template?

Once you've exported (or centralized) your historic data files, we suggest using the Data Migration Template as a reference for what information our team is looking for.

In other words, you don't need to input your offline data into our template. Instead, we simply recommend **copying the column names from the template and pasting them into *your data's* corresponding columns**. It's that simple!

That way, we can ensure that your columns are the same/similar to our DMS' required naming. And, if you're unsure of what information we're looking for, we've provided some handy examples/tips under each template column.

You'll also want to make sure that:

1. You've included all of the mandatory information (template columns highlighted in **green**)
2. You've provided any recommended information where applicable (template columns highlighted in **yellow**)

Finally, be careful not to leave any **empty fields**, check for any obvious **duplicates** if you can, and wherever possible, aim to follow a **consistent format** (in dates, city names, etc.). It's as easy as that!

Are you unsure about something in the template? **Check out our Tips for Migrating Your Historic Data**

Or watch this video about using our Data Migration Template as a guide:

Questions?

If you have any questions as you work through organizing your historical donor data, don't hesitate to **contact your Onboarding Expert directly.**

Or, feel free to bring up any specific data questions during your **Configuration Call.** That's what we're here for!

Final Step: Submitting Your Data

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

You're now ready to submit your data files 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 we 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.