

A Step-by-Step Guide: How to Export All Your DMS Data

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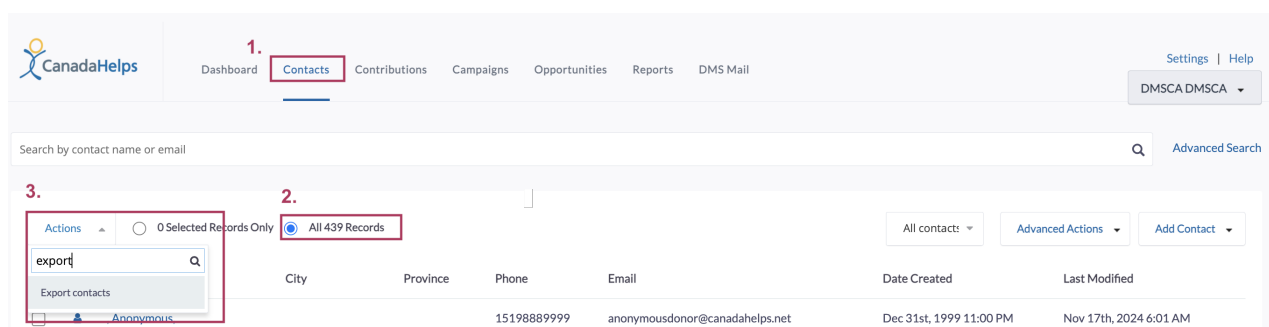
Exporting All Your DMS Data

This article will guide you through the step-by-step process of exporting all your data from the system. Exporting Contacts, Contributions, and Opportunities will cover everything stored in your instance, ensuring no information is left behind. Once complete, you'll have three CSV files, easily readable in Excel, providing a full backup of your records. Let's get started!

1. Exporting All Contacts

This Contacts export method includes all contact-related information, such as notes, addresses, phone numbers, communication preferences, and everything ever recorded for your individual, organization, or household-type contacts.

To export please follow the steps below:

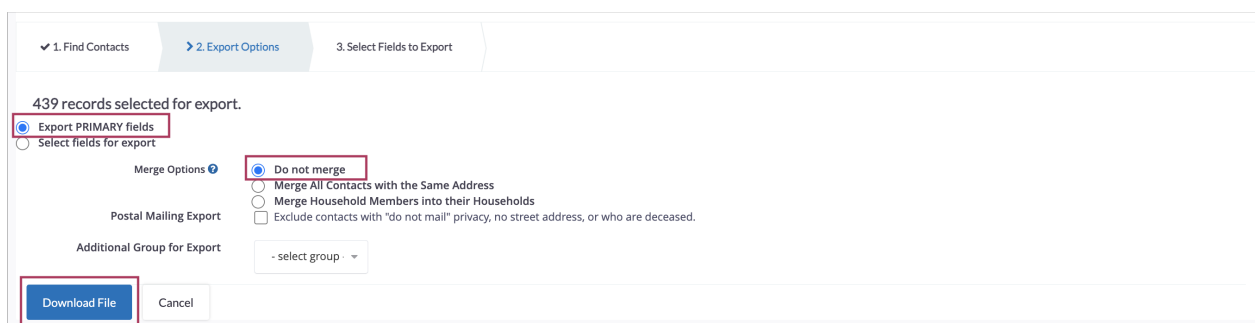


1. Go to the **Contacts** Tab

2. Click on **All # Records**

3. Click on **Actions** and choose **Export Contacts**

4. You will be directed to the next page, where the **Export Primary Fields** and **Do Not Merge** options are preselected. Ensure these options remain selected, then click **Download File** to proceed.



Primary fields include every single column available in your system, ensuring that no information is excluded.

Your CSV file will include Canada Helps driven contacts, as well as all manually recorded or previously imported data. Your file will be downloaded immediately to your device.

2. Exporting All Contributions

To complete the Contributions export, you will follow a similar process. This export includes all contribution-related information, covering donations made through Canada Helps, manually recorded contributions, and contributions processed directly within your DMS with iATS.

The screenshot shows the CanadaHelps interface. At the top, the 'Contributions' tab is selected. Below the navigation bar, there is a search bar and a table of contributions. The table has columns for Name, Amount, Fund, Campaign, Source, Method, Status, Receipt No., and Thanked. Two records are visible: Alfred MacKenzie (\$150.00, General Fund, DMS Manual, Cheque, Completed) and Andy Āccèntović (\$11.00, 16 Jan P2PJ, DMS Manual, Credit Card, Completed, Receipt No. WELL00001493). A dropdown menu is open over the table, showing 'Export contributions' as the selected option. Above the table, the 'All 3180 Records' radio button is selected. The 'Add Contribution' button is visible in the top right.

1. Go to the **Contribution Tab**
2. Click on **All # Records**
3. Click on **Actions** and choose **Export Contributions**
4. Make sure that **Export Primary Fields** option is pre-selected and click on **Download File** to proceed.

The screenshot shows a dialog box with three steps: '1. Find Contributions', '2. Export Options', and '3. Select Fields to Export'. The '3180 records selected for export.' message is displayed. Below the message, there are two radio buttons: 'Export PRIMARY fields' (selected) and 'Select fields for export'. At the bottom, there are 'Download File' and 'Cancel' buttons.

3. Exporting All Opportunities

If your organization was recording Opportunities we highly recommend exporting them as well.

1. Go to the **Opportunities Tab**

2. Click on **All # Records**

3. Click on **Actions**

4. Choose **Export opportunities**

CanadaHelps

Dashboard Contacts Contributions Campaigns **Opportunities** Reports DMS Mail

Settings | Help

DMSCA DMSCA

Search by contact name or email

0 Selected Records Only **All 19 Records**

All Opportunities:

Prospect	Opportunity Status	Opportunity Type	Application Deadline	Opportunity Amount	Amount Received	Opportunity Report Due
Ada Anderson	Approved	Grant	September 12th, 2022	\$5,000.00	\$2,000.00	September 6th, 2023
Ada Anderson	In Progress	Donation		\$500.00		

5. Make sure that **Export Primary Fields** is pre-selected and click on **Continue** to proceed.

✓ 1. Find Opportunities > 2. Export Options 3. Select Fields to Export

19 records selected for export.

Export PRIMARY fields

Select fields for export