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

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.
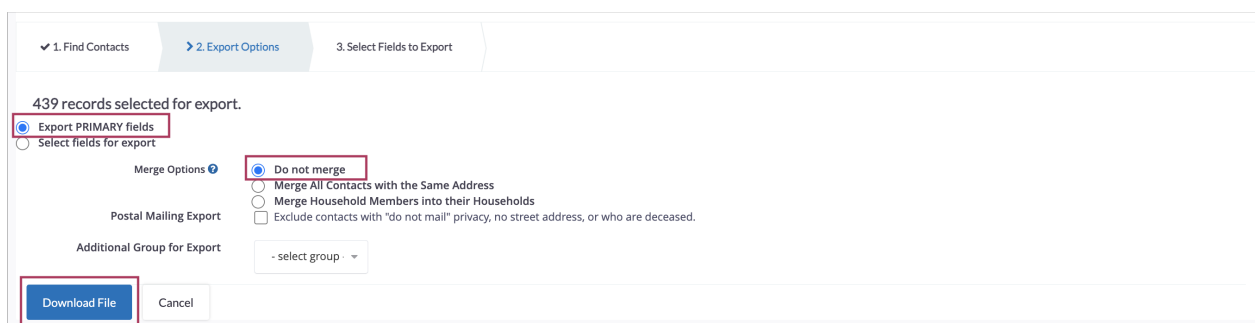
To export please follow the steps below:
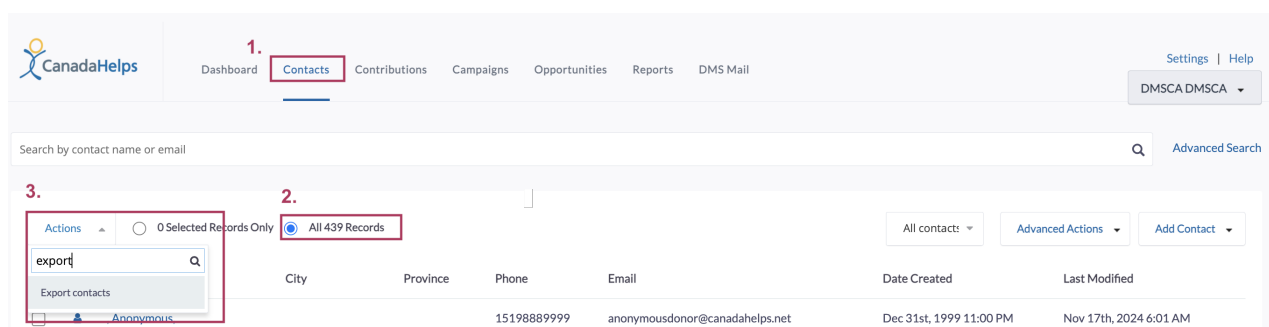
1. Go to the **Contacts** Tab

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.

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.

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**

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