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 exporting all your data from the system. Exporting Contacts, Contributions, Campaigns and Opportunities will cover everything stored in your instance, ensuring no information is left behind. Once complete, you'll have all your data easily readable in Excel, providing a full backup of your records. Let's get started!

How to Export Your Data

The export process is the same for each data category:

1. Go to the relevant tab (**Contacts**, **Contributions**, **Campaigns**, or **Opportunities**).

2. Click on **Export All**.

3. Click on **Start Export**.

4. Once the export is complete, a summary table will display all available files. You can download each file individually in CSV format or select **Download All Files (ZIP)** to download all files together.

Repeat these steps for each of the following sections to ensure you've exported all the data you need.

1. Contacts

The Contacts export includes information recorded for individual, organization, and household-type contacts, such as:

- Contacts
- Emails
- Phones
- Addresses
- Websites
- Contact Notes
- Relationships
- Group Memberships
- Activities

2. Contributions

The Contributions exports every field, including custom fields and tags:

- Contributions
- Recurring Contributions

3. Campaigns

The Campaigns exports every field, including custom fields and tags:

- Campaigns Groups (Campaigns)
- Budget Groups

4. Opportunities

If your organization has been tracking Opportunities in DMS, we recommend exporting these records as well to retain that information.