

CRM: Export Data from Other CRMs

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Transferring Data from Popular Data Sources

The GiveSmart implementation staff has extensive experience converting Fundraising CRM data from a wide variety of data sources, including other CRM systems.

While we expect the data to be provided in CSV format (with the 1st line containing the field names), we can help you convert generic data file formats into CSV files including:

- Microsoft Excel/Google Sheets
- Microsoft Access MDB files*
- DBF files*
- SQL files, including .BAK*

*There may be an additional charge depending on the complexity/number of tables in these file formats.

Transferring Data from Other CRM Systems

In addition, we can provide instructions from the respective vendor to export files from the following CRM systems, and here are the links to their respective help documents, if they provide them.

- **Blackbaud eTapestry**
 - Using the eTapestry report writing tool, you can export your data to Excel/CSV files.
- **Blackbaud Raiser's Edge**
 - Note: Raiser's Edge uses different terminology and the way to export data from RE is to create an "Import" file, as outlined from [their help documentation](#):
 - "Create an import file of records in your Raiser's Edge database to use in another application. All three options are available on the General tab.
 - While unfortunately counterintuitive, it is the best way to export records from Raiser's Edge to GiveSmart DonorCRM.
- **Bloomerang**
 - Bloomerang allows you to export data through creating a custom report. You can also download all files by:
 1. Login to Bloomerang.

2. Click Settings, View All Settings.
3. Click Edit on the Organization tile.
4. In the Database Export pane, click Create New Export. The export may take many minutes to finish.
- 5.

1. TIP: You may leave this screen while your export is being created. When you come back to the screen, you will see the Download button if the export is finished. If it's not there, press F5 to see if the export is complete.

6. Click Download.

- **DonorPerfect**
 - In DonorPerfect's Report Center, there is an "Export to File" report selection that allows you to export all data from DonorPerfect to Excel/CSV files.
- **Fundraising 50 (FR50)** 
 - Since Fundraising 50 is owned by GiveSmart, we will help you easily create a backup file from Fundraising 50 to transfer your data to GiveSmart Donor CRM!
- **Giftworks**
 - The Giftworks database is a Microsoft Access database. Once in Microsoft Access, you can export the tables to Excel/CSV files.
- **Little Green Light**
 - [Click on this help article](#) to use their "Comprehensive Export" tool to create CSV files of your data to import into GiveSmart Donor CRM.
- **Network for Good**
 - Network for Good has an "Export Bulk Action" that once you select all your contacts (or all your giving records) you can export them easily. [Click on this help article](#) to export the data to Excel/CSV files.
- **SalesForce** 
 - While you can export any SalesForce report to CSV files, SalesForce does allow an easier way to export your data all at once by clicking Setup > Administration Setup > Data Management > Data Export. [Click on this help article](#) to export the data to Excel/CSV files.
- **Salsa/Donor Pro**
 - Salsa allows you to export all of your supporters (donors & constituents) along with their transactions. [Click on this help article](#) to export the data to Excel/CSV files.

Note: There may be an additional charge depending on the complexity/number of tables in these file formats, please consult with your Customer Success Manager for additional information.