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How do we transfer our existing data to Donarius?

To transfer your data from your current software to Donarius® you first export it out of your current software then import it into Donarius. When exporting choose a delimited text file, CSV or Excel format. It is best to export to one file for the names and addresses and another for the contributions. The contribution file must have a way of matching each contribution to the donor that is in the name/address file. You can use any of these:

a) the full name
b) a donor# or member# ID
c) an envelope#

The contribution file also needs the date and amount donated for each donation. Alternatively you can have a file with only the total donated for the year and you would manually type any date in the year. You should also have a column for the category name donated to. Any new category in the file will automatically be created in Donarius. If all donations are in the same category, it can be omitted from the file and the software will save each contribution in the first available category. If desired, the file can also have a column for the method of payment, such as check, cash, credit card or an online platform.

Then import by following these steps:

1. Start Donarius.
2. At the bottom left click Import.
3. Select the file with your names and addresses.
4. At the top left choose **Donors**.
5. At the top right choose **Replace all existing data**.
6. Select the meaning of each column by changing the selection at the top of each. (Click the **==>** button to see more columns.)
7. Click the **Import** button.
8. Click Yes or OK to any confirmation message.
9. When done, you'll be asked if you want to import donations – click Yes.
10. Select the file with the contributions.
11. At the top left choose **Donations**.
12. At the top right choose **Replace all existing data**.
13. Select the meaning of each column by changing the selection at the top of each.
14. Click the **Import** button.
15. Click Yes or OK to any confirmation message.

You can watch a video of this process here:
https://www.donarius.com/videos/importing.html

You can do this yourself or we can help you with a screen share.
To get help, call us at 1-888-479-4636 or 1-866-688-3727.

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Sources:

https://www.donarius.com/videos/importing.html (Accessed Aug 13, 2026)

https://www.donarius.com/Help/import.htm (Accessed Aug 13, 2026)