

Adding Multiple Contributions at Once (Batch Data Entry)

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Donor Management System

If your organization has received many of the same or similar offline Contributions from a small to a medium number of donors, you can use the Batch Data Entry tool to easily **add all these Contributions at once**.

For example, if 10 donors have each sent in \$10.00 as part of your school supplies package gift guide, you can use the Batch Data Entry tool to speed up the manual recording of these gifts in your DMS. You can also Save incomplete Batches of data as a draft and edit Data Entry Batches at your convenience.

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Considerations

- The DMS Batch Entry tool represents a slightly more manual input of information from your charity. For this reason, we often recommend it for recording a small to a medium number of donations. That said, **you can use the Batch Entry tool to add as many as 100 Contributions at once**.

Accessing the Batch Data Entry Tool

1. Visit the **Contributions** tab
2. Under **Advanced Actions**, select **Batch Data Entry** from the menu

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Search by contributor name or email

Advanced Search

Actions 0 Selected Records Only All 1435 Records

All Contributions

Advanced Actions

Add Contribution

Batch Data Entry

(BETA) Search Builder

Bulk Import Contributions

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Batch No.	Thanked
<input type="checkbox"/>	March 1st, 2023 02:31 PM Tamara Rahmani	\$100.00	General Fund		DMS Manual	Cheque			-
<input type="checkbox"/>	March 1st, 2023 02:19 PM Nicole Lam	\$500.00	General Fund		DMS Manual	Cheque			-
<input type="checkbox"/>	March 1st, 2023 01:17 PM Nicole Lam	\$300.00	General Fund		DMS Manual	Cheque	Completed		-
<input type="checkbox"/>	March 1st, 2023 12:32 PM Tamara Rahmani	\$150.00	General Fund		DMS Manual	Cheque	Completed		-
<input type="checkbox"/>	March 1st, 2023 09:41 AM Noboru K	\$50.00 (Recurring)	2023	Monthly Giving Webinar	DMS Manual	Cheque	Completed		✓

Hover over Advanced Actions to view Batch Data Entry

3. You will be directed to the **Batch Data Entry Page** where you can:

- **Add a New Data Entry Batch:** begin the process of creating a new Data Entry Batch by selecting the **New Data Entry Batch** button.
- **Browse or search a pending Data Entry Batches:** the DMS keeps a record of all started and pending Data Entry Batches that can either be browsed or searched on the page. **You can't see completed Batches at this time on this page, however, you can see them by filtering Reports.**

Performing a Batch Data Entry

1. Select the **New Data Entry Batch** button at the top left corner of the screen

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Batch Data Entry

Data Entry Batches

SEARCH

Complete OR partial batch name.

New Data Entry Batch

Show 25 entries

First Previous 1 2 3 Next Last

Batch Name	Type	Item Count	Total Amount	Status	Created By	
Batch 90: 2023-02-09	Contribution	10	\$ 2,323.00	Data Entry	John Bonjovi	Enter records Edit Delete

New Data Entry Batch

2. On the next page, enter your Batch Data Entry's initial information, and select the **Save**.

- **Batch Name:** this field can be edited but will be prefilled with the sequential order of the Batch that is being created and the current date.
- **Type:** the only selection at this moment is *Contribution*. We will be introducing new options in the future.
- **Description:** provides more details regarding your Batch.
- **Number of Items:** the number of Contributions/transactions your Batch Data Entry contains. The DMS uses this to generate the proper number of rows.
- **Total Amount:** the total value of the Bath Data Entry (e.g.: if you've received 10 donations of \$10 each, insert \$100 in total)

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CiviCRM

New Data Entry Batch

Save Cancel

Batch Name * School Supplies Gift Guide

Type Contribution

Description Donations received for our "School Supplies Package Gift Guide" campaign

Number of Items * 10

Total Amount * 100.00

Save Cancel

?

Initial details for Batch

3. On the next screen, **fill out the necessary information** for each individual Contribution.

Tip: if you have many repeated values (e.g., all Contributions assigned to the same Campaign), you can select the "two pieces of paper" icon next to a column's name to copy the value in the first row to all subsequent rows in that column.

Batch Data Entry for Contributions

Total amount expected: \$100.00
Total amount entered: \$100.00

Contact	Received	Campaign	Fund	Amount	Payment Method	Status	Cheque Number	External Transaction ID	Contribution Source	Note	CONTRIBUTION RECEIVED	EXCLUDE FROM TAX RECEIPTING	Recurring
✓ Clotilde Nieto	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cheque	Completed	324658				<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Bridget Jones	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cash	Completed					<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Lili Duran	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cash	Completed					<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Nevada Brown	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cheque	Completed	5451410				<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Roger Alagh	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cash	Completed					<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Laura Pezzetti	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cash	Completed					<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>
✓ Bill Kosterko	03/01/2023 05:03PM	Christmas in July Campa	General Fund	10	Cash	Completed					<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> <input checked="" type="checkbox"/>

Batch Data Entry Details

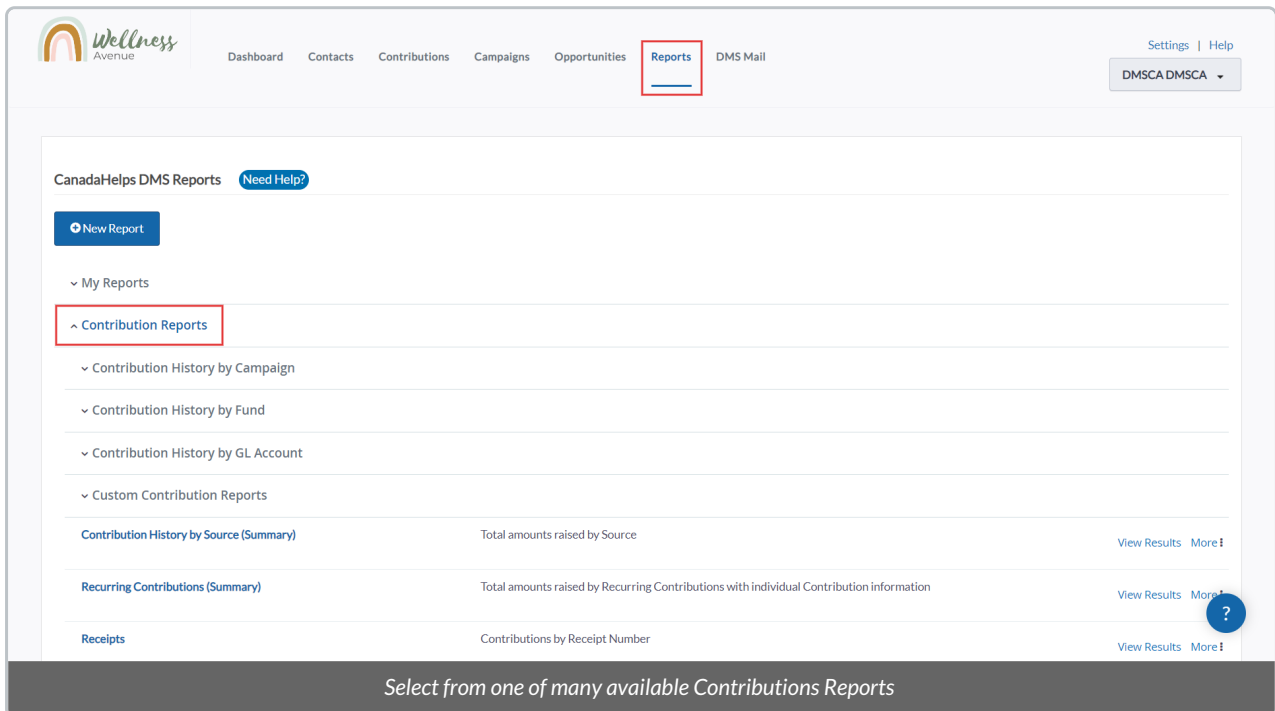
- **Contact:** add an existing Contact in the DMS or add a brand new one.
- **Received:** defaults to your current date and time but can be edited.
- **Campaign:** which Campaign the Contribution is associated with.
- **Fund:** which Fund the Contribution is associated with.
- **Amount:** the Contribution's monetary value. The \$ amount can be entered with or without decimals.
- **Payment Method:** the payment method utilized in the transaction.
- **Status:** defaults to *Complete* but this can be edited.
- **Cheque Number:** optional for further segmentation.
- **External Transaction ID:** optional for further segmentation.
- **Contribution Source:** the source associated with the Contribution when it was originally imported into the DMS
 - For **Contribution Source**, we recommend labelling each contribution added through Batch Data Entry as **DMS Manual**, so that you can perform effective [Advanced Searches on your Contributions](#).
- **Note:** optional details.
- **Contribution Received:** mark the selected contribution/s as already tax-receipted (e.g., because a tax receipt has already been issued outside of the DMS)
- **Exclude from Tax Receiving:** mark the selected contribution/s as ineligible to receive a tax receipt via the DMS
- **Recurring:** mark the selected contribution/s as recurring (**Note:** this is simply a label and will *not* automatically process/record new, subsequent Contributions)

4. After adding all the necessary information, select **Validate & Process The Batch** at the bottom of your screen to add all the Contributions to their corresponding Contacts, or select **Save & Continue Later**.

Searching by Completed Data Batches

Once done, you can see any of your completed Batch Data Entries when pulling specific Reports in your DMS.

1. Visit the **Reports Tab** and expand the full list of your **Contribution Reports**



2. Some Contribution Reports we recommend to **filter** by **Batch** name are:

- Contribution History by Campaign (Detailed)
- Contribution History by Fund (Detailed)
- Receipts
- Contributions for Bookkeeping (Detailed)

3. Once you've selected your desired Report, select the **Filters** tab

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Contribution History by Campaign (Detailed)

Columns **Filters**

Contact Name (in sort format)	Contains	
Contact ID	Is less than or equal to	
Contact Type	Is one of	- select -
Contact Sub Type	Is one of	- select -
Is deleted	Is equal to	No
Preferred Language	Is one of	- select -
Do Not Email	Is equal to	Any
Do Not Phone	Is equal to	Any
Do Not Mail	Is equal to	Any

Reports filters

4. Scroll down and **filter your Report by Batch Name**. You'll be able to choose from among your completed Batches in this field.

Contribution Aggregate	Is less than or equal to	
Contribution Count	Is less than or equal to	
Campaign Group	Is one of	- select -
Contribution Source	Is one of	
Payment Method	Is one of	
Campaign Type	Is one of	
CH Fund	Is one of	
Batch Title	Is one of	<ul style="list-style-type: none"> Batch TEST CELINA: 2022-09-13 November 14 Batch Oct 2022 School Supplies Gift Guide Winter Direct Mail 2023 pt 2
Credit Card Type	Is one of	- select -
Tag	Is one of	- select -
Group	Is one of	- select -

Filter by completed Batch Data Entry

5. You'll then be able to see a report of the Contributions comprising your selected Batch Data Entry.

Contribution History by Campaign (Detailed)

Columns		Filters	
<input checked="" type="checkbox"/> Donor Name	<input type="checkbox"/> Contact Type	<input type="checkbox"/> Contact Sub Type	<input type="checkbox"/> Do Not Trade
<input checked="" type="checkbox"/> Contact ID	<input type="checkbox"/> Donor Phone	<input checked="" type="checkbox"/> Campaign	<input checked="" type="checkbox"/> Source
<input type="checkbox"/> Donor Email	<input checked="" type="checkbox"/> Fund	<input type="checkbox"/> Transaction ID	<input type="checkbox"/> Date Received
<input type="checkbox"/> Contribution ID	<input type="checkbox"/> Campaign Number	<input type="checkbox"/> Amount	<input type="checkbox"/> Non-deductible Amount
<input checked="" type="checkbox"/> Payment Type	<input type="checkbox"/> Thank-you Date	<input type="checkbox"/> Cancelled / Refunded Date	<input type="checkbox"/> Cancellation / Refund Reason
<input type="checkbox"/> Receipt Date	<input type="checkbox"/> Net Amount	<input type="checkbox"/> Batch Name	<input type="checkbox"/> City
<input type="checkbox"/> Fee Amount	<input type="checkbox"/> Campaign Type	<input type="checkbox"/> Supplementary Address Field 2	<input type="checkbox"/> Disbursement Date
<input checked="" type="checkbox"/> Campaign Group	<input type="checkbox"/> Supplementary Address Field 1	<input type="checkbox"/> Country	
<input type="checkbox"/> Street Address	<input type="checkbox"/> Province		
<input type="checkbox"/> Postal Code			

Additional info
Contribution Details
Dedication Information
Custom Question
Privacy Email opt-in

[Refresh results](#)

Actions

Group(s)	Campaign
Is deleted	Is equal to No
Contribution OR Soft Credit?	Is equal to Contributions Only
Contribution Status	Is Completed
Batch Name	Is School Supplies Gift Guide

Campaign: Fundraising for peace (5 contributions: \$ 100.00)

Campaign Group	Contact ID	Donor Name	Date Received	Amount	Fund	Campaign	Source	Payment Type
	446	sachdeva ya	2023-03-01 17:26:00	\$ 20.00	General Fund	Fundraising for peace		Cheque
	322	Rahmani Tamara	2023-03-01 17:26:00	\$ 20.00	General Fund	Fundraising for peace		Credit Card
	320	Potiziani Daniel	2023-03-01 17:26:00	\$ 20.00	General Fund	Fundraising for peace		Cash
	310	Munoz Jordan	2023-03-01 17:26:00	\$ 20.00	General Fund	Fundraising for peace		Cheque
	522	Roca Pilar	2023-03-01 17:26:00	\$ 20.00	General Fund	Fundraising for peace		Cash

Row(s) Listed	5
Total Amount (Contributions)	\$ 100.00 (5)
Total Contributions	5
Fees	\$ 0.00
Net	\$ 100.00
Average	\$ 20.00

Contributions included in your selected Batch Data Entry, sorted by Campaign