

Importing Contributions in Bulk (Import Tool)

Last Modified on 07/04/2024 10:52 am EDT

Donor Management System

This article will cover how to import a large number of Contributions into your DMS at once using the **Bulk Import tool for Contributions**.

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Preparing for Import

1. Download our two handy Data Templates, and use them as guides when preparing your Contribution data for import. All you have to do is **copy the Template column names, and paste them directly into your data's corresponding columns**.

[Importer Template for Contributions- Individuals](#) 

[Importer Template for Contributions- Organizations](#) 

Tip: Pay special attention to columns labelled **Mandatory (green)** and **Recommended (yellow)**, so you can be sure to include the information that the DMS needs in order to map your Contributions successfully.

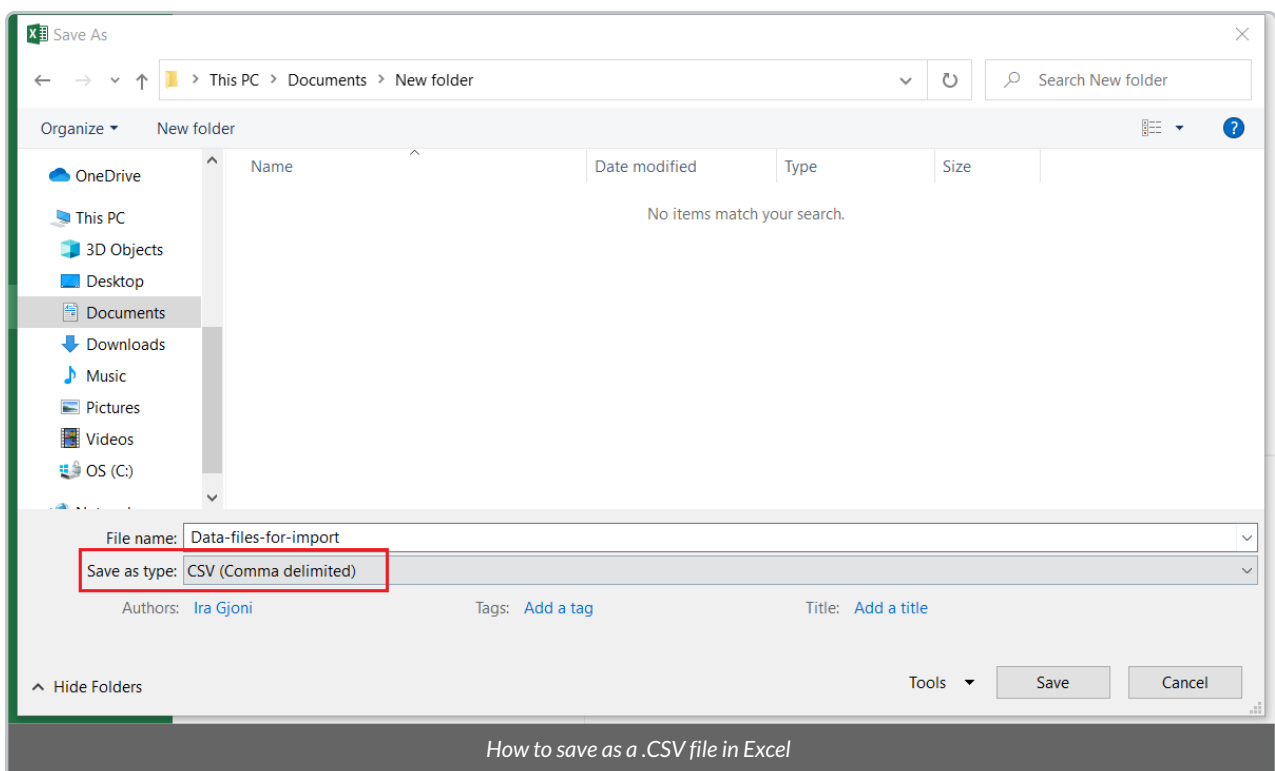
If they aren't relevant to your import, feel free to leave out any **Optional (grey)** columns from your import file.

2. For a successful import, **any Contributions that you import must correspond to Contacts that already exist** in your DMS. So, make sure that any Contributions you'll be importing belong to an existing Contact in the DMS, and if needed, **add a new Contact manually** first.

Tip: Need to mass-add new Contacts? Check out our [Bulk Import Tool for Contacts](#) first.

3. For a successful import, your **Contributions must be sorted by Contact Type** (i.e., *Individuals* and *Organizations*). For this, simply sort your Contribution data into **two separate .CSV files** (one file for *Individuals*, and one file for *Organizations*; see two templates above). You can then perform **two separate imports** (one for each .CSV file) following the instructions in this article.


4. Finally, you'll want to ensure that the data you'll be importing is saved as a **Comma-Separated Values (.CSV) file**:



Accessing the Import Tool

Once you've finished organizing your Contribution data based on the Template/s above, you're ready to start the import into your DMS!

1. Login to your DMS and visit the **Contributions** tab
2. Under **Advanced Actions** on the right, select **Bulk Import Contributions**.



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DMSCA DMSCA

Search by contributor name or email

Actions

☒ 0 Selected Records Only
☐ All 1435 Records

All Contributions

Advanced Actions

Batch Data Entry
(BETA) Search Builder
Bulk Import Contributions
Completed

Add Contribution

	Received	Name	Amount	Fund	Campaign	Source	Method		pt 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		✓

Bulk Import Contributions

Note: Don't see the Bulk Import tool for Contributions in your DMS? Reach out to our team at info@canadahelps.org and we'll get you set up!

3. On the next page, you'll see the **four steps** required to import your Contributions:



Importing Your Contributions

Step 1: Upload Data

1. The **Data Source** field will be pre-selected for you as **Comma-Separated Values (.CSV)** format.
2. Click on **Choose File** and select the data file you'd like to import
3. If your data file has column headers (e.g., *Amount*, *Campaign*), check off **First row contains column headers** to ensure that your headers aren't imported as a Contribution (but rather used to map your data).

Note: If your data file doesn't have any headers (i.e., the first row contains Contribution information and not column names), leave this box unchecked.

Bulk Import Contributions

> 1. Upload Data 2. Match Fields 3. Preview 4. Summary

The Contribution Import Wizard allows you to easily upload contributions from other applications into CanadaHelps DMS. Files to be imported must be in the 'comma-separated-values' format (CSV) and must contain data needed to match the contribution to an existing contact in your CanadaHelps DMS database.

Continue Cancel

Import Data File * Contributions...or-Import.Csv

File format must be comma-separated-values (CSV).
Maximum Upload File Size: 3 MB

☒ First row contains column headers
Check this box if the first row of your file consists of field names (Example: 'Contact ID', 'Amount').

Upload your data

4. Tell the system what **type of Contact** (*Individuals* or *Organizations*) the Contributions correspond to.

Reminder: The Import tool requires Contributions to be imported separately by **Contact Type**. See [Preparing for Import \(point 3\)](#) above for more information.

Import Options

Contact Type ☒ Individual ☐ Household ☐ Organisation Subtype - select -

Importing by Contact Type

5. Select an **Import mode** to indicate whether the Import tool will be creating new Contributions or updating existing Contributions in your DMS.

Import mode ☒ Insert new contributions ☐ Update existing contributions

You can Insert new contributions or use Update existing contributions to change existing data in contribution fields.

Import modes

Note: When updating existing Contributions, please include the **Transaction ID, Date Received, Total Amount, and Fund** fields in your file.

These are required fields that help the Import tool identify the correct existing Contributions and update them with any new information.

6. If your data includes any dates (e.g. donation date, receipted date), select the Date Format that matches the

format in your data:

Date Format

☒ yyyy-mm-dd OR yyyymmdd (1998-12-25 OR 19981225) OR (2008-9-1 OR 20080901)
☐ mm/dd/yy OR mm-dd-yy (12/25/98 OR 12-25-98) OR (9/1/08 OR 9-1-08)
☐ mm/dd/yyyy OR mm-dd-yyyy (12/25/1998 OR 12-25-1998) OR (9/1/2008 OR 9-1-2008)
☐ Month dd, yyyy (December 12, 1998)
☐ dd-mon-yy OR dd/mm/yy (25-Dec-98 OR 25/12/98)
☐ dd/mm/yyyy (25/12/1998) OR (1/9/2008)

Select the date format used in your data files

Note: If your data contains a different date format than what you've selected, it'll be flagged as an error in the *Preview* step.

Step 2: Match Fields

1. If you've selected **First row contains column headers** (step 3 above), your column headers should now show up under Column Names and your first row's data under **Import Data (row 1)** (and so on).

Import Contributions

✓ 1. Upload Data

> 2. Match Fields

3. Preview

4. Complete

Review the values shown below from the first 2 rows of your import file and select the correct column names for each. If you think you may be importing additional data from the same data source, check the "Import additional data from this source" box.

Previous

Continue

Cancel

Column Headers	Import Data (row 2)	Import Data (row 3)
External Identifier	HC-00001	HC-78657
Organization Name		
First Name	Mary	Ann
Last Name	Baker	Taylor

Column Names + Rows

2. Based on the file uploaded, the Import Tool will **automatically suggest the Matching DMS Field** that corresponds to your rows, but you can always look for/edit a field by selecting the drop-down arrow.

Import Contributions

✓ 1. Upload Data > 2. Match Fields 3. Preview 4. Summary

Review the values shown below from the first 2 rows of your import file and select the matching CanadaHelps DMS database fields from the drop-down lists in the right-hand column. Select '- do not import -' for any columns in the import file that you want ignored. If you think you may be importing additional data from the same data source, check 'Save this field mapping' at the bottom of the page before continuing. The saved mapping can then be easily reused the next time data is imported.

[Previous](#) [Continue](#) [Cancel](#)

Column Headers	Import Data (row 2)	Import Data (row 3)	Matching CanadaHelps DMS Field
External Identifier	HC-00001	HC-78657	Contact ID (match to contact) *
Organization Name			-do not import-
First Name	Mary	Ann	First Name (match to contact) *
Last Name	Baker	Taylor	Last Name (match to contact) *
Transaction ID	HT-00001	HT-00002	Transaction ID
Contribution Amount	25	25	Total Amount *
Date Received	8-30-2017	5-31-2018	Date Received
Payment Method	Credit Card	Credit Card	Payment Method
Campaign Name	Summer Festival Event	Summer Festival Event	Campaign
Fund	Supporting Young Talents	Supporting Young Talents	Fund *
Fee	1	1	Fee Amount
Non-Deductible Amount			Advantage Amount

Matching your fields to the DMS fields

Note: As you'll see in either of the Contribution Data Templates (provided above), we recommend using unique fields (e.g., *Contact ID*, *External ID*) to match Contributions to Contacts.

3. Use the **Save this field mapping** checkbox at the bottom of your screen to save these mapped fields and avoid having to map them again (e.g., should you need to upload an updated file to correct any errors; see *Step 4: Summary* below).

Save Field Mapping

Cheque Number:

Contribution Note:

☒ **Save this field mapping**

Name:

Description:

[Previous](#) [Continue](#) [Cancel](#)

Save Field Mapping

4. If you do choose to save your field mapping, in the future, you'll be able to find it in the drop-down menu on **Step**

1. Upload Data:

The screenshot shows the 'Bulk Import Contributions' interface, specifically the '1. Upload Data' step. The form includes a progress bar at the top with four steps: '1. Upload Data' (highlighted with a red box), '2. Match Fields', '3. Preview', and '4. Summary'. Below the progress bar, a message states: 'The Contribution Import Wizard allows you to easily upload contributions from other applications into CanadaHelps DMS. Files to be imported must be in CSV format.' There are 'Continue' and 'Cancel' buttons. The 'Import Data File' section has a 'Choose File' button and a text input showing 'data-Migratio...helps (5).xlsx'. Below this, it says 'File format must be comma-separated-values (CSV)' and 'Maximum Upload File Size: 3 MB'. A checkbox labeled 'First row contains column headers' is checked. The 'Contact Type' section has three radio buttons: 'Individual' (selected), 'Household', and 'Organisation'. The 'Import mode' section has two radio buttons: 'Insert new contributions' (selected) and 'Update existing contributions'. The 'Import Field Separator' is set to a comma. The 'Date Format' section has several radio buttons, with 'yyyy-mm-dd OR yyyyymmdd' selected. The 'Saved Field Mapping' section has a text input showing 'Contrib Import Sept '22' and a dropdown menu (highlighted with a red box) to select a saved mapping. At the bottom, there are 'Continue' and 'Cancel' buttons. A dark grey banner at the very bottom of the form reads 'Accessing a previously-saved Field Mapping'.

Step 3: Preview

The **Preview** step serves as the final confirmation page before submitting your data for bulk import.

1. If there are any preliminary errors with your data, the Import Tool will prompt you to **download a list of records that require editing** before proceeding to the final step.

2. To see and update these errors, click the **Download Errors** link to download the CSV file, where you'll find the errors under *Column B*.

Import Contributions

✓ 1. Upload Data ✓ 2. Match Fields **> 3. Preview** 4. Summary

The information below previews the results of importing your data in CanadaHelps DMS. Review the totals to ensure that they represent your expected results.
 CanadaHelps DMS has detected invalid data or formatting errors in 11 records. If you continue, these records will be skipped. You can download a file with just these problem records: [Download Errors](#). If you wish, you can then correct them in the original import file, cancel this import, and begin again at step 1.
 Click 'Import Now' if you are ready to proceed.

[Previous](#) [Import Now](#) [Cancel](#)

Total Rows	11	Total rows (contribution records) in uploaded file.
Rows with Errors	11	Rows with invalid data in one or more fields. These rows will be skipped (not imported).
		Download Errors
Valid Rows	0	Total rows to be imported.

Preview Fields

3. Note: If you opt to **proceed with the import** without correcting any errors, any **rows with errors will not be imported**.

Import Contributions

✓ 1. Upload Data ✓ 2. Match Fields **> 3. Preview** 4. Summary

The information below previews the results of importing your data in CanadaHelps DMS. Review the totals to ensure that they represent your expected results.
 CanadaHelps DMS has detected invalid data or formatting errors in 11 records. If you continue, these records will be skipped. You can download a file with just these problem records: [Download Errors](#). If you wish, you can then correct them in the original import file, cancel this import, and begin again at step 1.
 Click 'Import Now' if you are ready to proceed.

[Previous](#) [Import Now](#) [Cancel](#)

Total Rows	11	Total rows (contribution records) in uploaded file.
Rows with Errors	11	Rows with invalid data in one or more fields. These rows will be skipped (not imported).
		Download Errors
Valid Rows	0	Total rows to be imported.

Importing without correcting errors

Step 4: Summary

This is the final step of your data import. Hooray!

1. If there were **no errors with the import**, the number of **Total Rows will match the Records Imported**. If this is the case, you can select **Done**, as there's no further action required of you

Done

Total Rows	329	Total rows (contribution records) in uploaded file.
Records Imported	329	Total number of rows imported successfully.

Done

Successful import

2. On the other hand, **if the Import tool detected any errors** (e.g., formatting errors) during the import, it'll produce a file/s for you to download and review:

Import Contributions

✓ 1. Upload Data

✓ 2. Match Fields

✓ 3. Preview

> 4. Summary

Import has completed successfully. The information below summarizes the results.

CiviCRM has detected invalid data and/or formatting errors in 116 records. These records have not been imported.

You can [Download Errors](#). You may then correct them, and import the new file with the corrected data.

Done

Total Rows	329	Total rows (contribution records) in uploaded file.
Invalid Rows (skipped)	116	Rows with invalid data in one or more fields. These rows have been skipped (not imported).
		Download Errors
Records Imported	0	Total number of rows imported successfully.

Done

Import errors

3. Depending on the amount of records needing correction, you can decide how you'd like to proceed:

- You can download your errors, make any necessary changes to your data, and repeat the import steps above;
OR
- If there are few errors, you may want to simply [add these Contributions records manually](#) instead

Questions?

If you have any questions as you complete the Bulk Import, don't hesitate to **contact our team**. That's what we're here for!

What's Next?

If you've finished with all of your bulk importing, go ahead and check out all of your newly-imported Contribution data in your DMS!

Tip: Perform an [Advanced Search](#) to filter your Contributions by whatever *Source* name you gave your import (e.g., May 2023 Import).