Importing Donations in Bulk

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This article will cover how to import a large number of Donations into Charity OS at once using the Bulk Import tool for Donations.

Table of Contents:

Make sure the contacts tied to those donations already exist in your Charity OS database. If they're not in the system yet, you'll want to import those first. We recommend checking out our guide on importing contacts in bulk for step-by-step help.

Once all the right contacts are in place, you can go ahead and map the donations to their profiles using either the Contact ID or External ID.

Preparing for Import

To make your import process as smooth as possible, we've created a ready-to-use template. It takes the guesswork out of formatting, just copy the column names into your data file so the system can map everything correctly.

Importer Template for Contacts and Donations

A little prep goes a long way. Here are a few things to check before uploading your file:

- Make sure all donors are already in Charity OS before importing donations linked to them.
- Double-check that names are spelled the same across all entries, and use a consistent format for dates.
- Use the same email address for each donor to avoid creating duplicate records.
- Confirm that payment methods, campaigns, funds, and sources are already set up in Charity OS.
- Save your file as a .CSV or .XLSX.

Tip: Look out for column colours in the template:

- **Green = Mandatory**
- **Yellow = Recommended**
- **Grey = Optional** (you can skip these if they're not relevant)

1. Download the import templates zip file, which includes both the Contacts and Donations import templates.

2. Copy and paste all **Mandatory** headers, along with any **Recommended** and **Optional** headers, from the template file into your existing file, or copy and paste your data into the corresponding columns in the template file.

3. Make sure to save the data you're importing as a Comma-Separated Values (.CSV) file or a Microsoft Excel Spreadsheet (.XLSX).

Note: If your existing file is missing a column (for example, if the donor's first and last names are in one column in your file, but Charity OS separates them), you'll need to add the missing column (e.g., for the last name). Then, simply copy and paste all the last names into the new column.

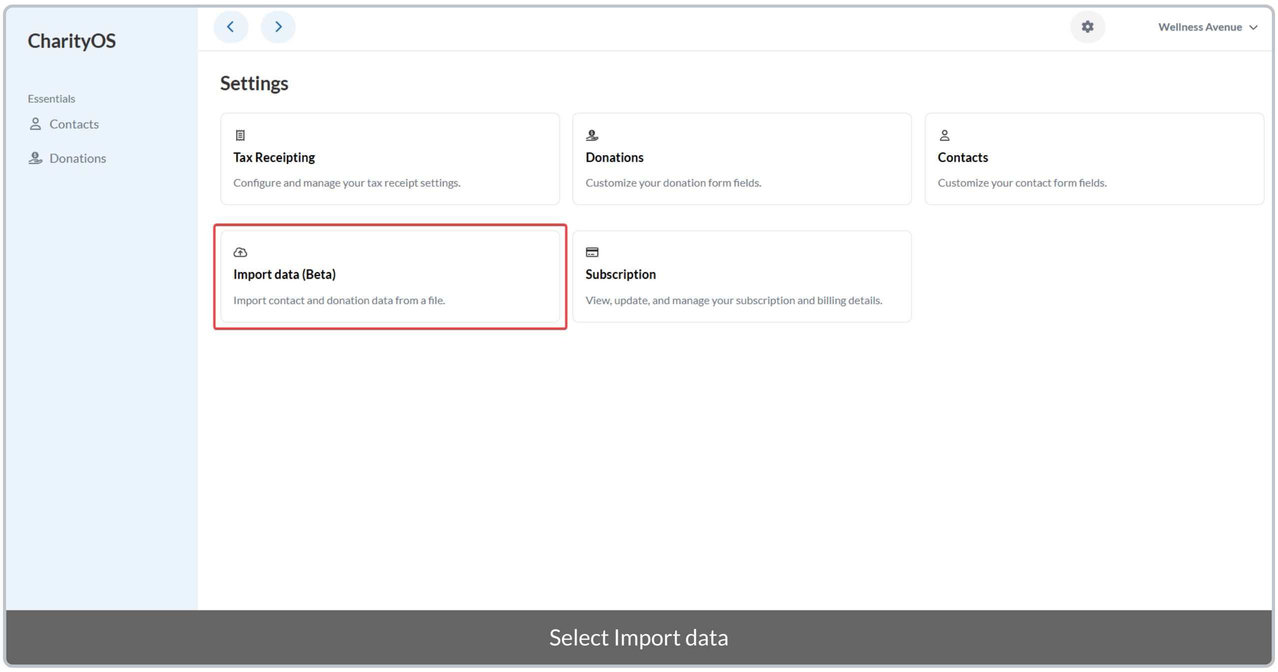
copy and paste the column names into your data file

Accessing the Import Tool

Once you've organized your data, you're ready to start importing into Charity OS!

1. To access **Settings**, click on the **gear icon** in the top-right corner of your account.

2. Select **Import data**.



3. When you’re ready to begin the import, click on **Next**.

4. Select **Contacts** from the drop down list option.

Importing Your Contacts

1. Upload and Sheet Selection

To upload your file, either drag and drop your file into the box or click on **Select files** to locate the file in your computer to upload the file. The accepted file types are .CSV, .XLS.

2. Header Selection

From the file uploaded, select the row that contains the header information (**usually the first row**). This row will identify the labels for each column and help Charity OS map the data correctly.

3. Match Columns

Charity OS will try to match your column headers automatically based on common keywords. If something doesn't match or gets matched incorrectly, just click **Select** next to the column. You can then search for the correct field or scroll through the list to find the right one.

If an option is missing: for example, if you're trying to select **PayPal** under *Payment Method* and it's not showing up, you'll need to add it to Charity OS first. Refer to this article on how to new Donation options:

- (in a new tab) click on **Settings**

- Select **Donations**, then **Payment method**
- Add the missing option

Once that's done, return to your import tab and click on **Back**. This refreshes the available options so the one you just added appears in the list. Don't worry, you won't lose your entire progress. You'll just be taken back one step in the process, and can pick up right where you left off.

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Once all the required fields have been mapped and the checkmarks on the right turn green, click on **Confirm**.

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4. Review Entries

If there are errors with any of the entries (such as):

- **Empty fields:** for mandatory columns.
- **Invalid formats:** for dates or phone numbers.

Charity OS will flag these issues by showing the number of affected rows in the **Error Rows (#)** tab.

To fix them, just click **Find Error**. That'll jump you right to the row with the issue. Look for the **red-highlighted cell**, double-click it, and make your correction directly on the page.

Here are a few examples of errors and fixes:

- **Missing payment method?**

Double-click the cell and select the correct payment method from the dropdown options.

- **Can’t find the donor in Charity OS?**

If it’s a typo in the contact’s name, just double-click and correct the spelling.

If the contact is missing entirely and you're not ready to add them yet (maybe you’re planning another bulk contact import), you can delete the row for now. To do that, click the row number and select the checkbox that appears, then click on the **Delete** option.

Keep going until all errors are fixed. Once everything looks good, click **Complete Import** to finish!

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 Charity OS!