

Bulk Offline Uploading

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Upload offline donations in bulk into your GiveSmart Fundraise account for simple inclusion of multiple offline donations into your campaign. Save time and effort and easily include *all* donations in your campaign total.

Uploaded donations will show on the Campaign thermometer for Text-to-Donate and Crowdfunding campaigns. For Text-to-Donate campaigns, offline donations are uploaded to the Keyword. For Crowdfunding and Peer-to-Peer campaigns, offline donations can be bulk uploaded to a main crowdfunding page, team or individual.

How to Upload a Bulk List

Prepare your list to upload

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Phone	Amount	First name	Last name	Middle Name	Email	Payment Met	Source	Anonymous	Team	Fundraiser	Transaction [Street addr:	City	State	Zip	Gender
2	8883331231	7290	Abraham	Lincoln		abr@somedc	Check	Event	yes	Ash	John Smith	11/16/18	1011 S. 2nd S	Springfield	IL	62704	Male
3	888-333-123	\$8,055	John	Public	Q	jp@somedon	Cash	Website				8/23/18					M
4	(888) 333-12	\$5,497	Wilma	Sanders		ws@somedo	Other	Mail	no	Elm	Janet Jones	12/25/18	50 Granite Av	Pittsburgh	PA		F

1. Create your list as a comma separated value (CSV) spreadsheet
 - We have an example file that you can work with, [Bulk Upload List Template](#) .
2. Make sure the **Amount** field is populated
 - Everything else is technically optional, but you will likely want to include more
 - Phone and Amount formatting doesn't matter. You can include parentheses, dashes, commas, dollar signs and it will still recognize the amount.
3. Make sure the **Anonymous** column has the the word "yes" in it for those who wish to remain anonymous. You do not need to add "no" but it won't hinder the upload
 - If you do not have a (non-required) field to upload, it is fine to leave it blank.
4. For **Crowdfunding and Peer-to-Peer Fundraising** uploads, make sure to include the **Team** and/or **Fundraiser**.
 1. Those entries without a Team or Fundraiser (or a misspelled team/fundraiser) will still upload, but only to the general activity numbers.
 2. If you upload to a fundraiser who belongs to a team, it will also add the amount to the team's amount.
5. If you have custom elements on your form, you can also include these in the list.

Transaction Dat ▾

11/16/2018

8/23/2018

12/25/2018

Note: If you include **Transaction Dates**, the year MUST be a **four digit year** and it will show whether it is 2 or 4 digits when you upload so you can verify it. The Date should be in the format of **mm/dd/yyyy**. Make sure when you export or save your CSV that it doesn't rewrite the year to a 2-Digit. Blank and improperly formatted transaction dates will bring in the donation at the current date/time.

Upload Your List

1. Go into the activity you wish to upload the list.
2. Select **Enter Offline Donations** on the left column

The screenshot shows a navigation menu with two columns. The left column contains the following items: Keyword, Online Forms, Mobile Experience, Fulfillment, Fundraising Thermometer, GiveLater, GiveLater Buttons, and **Enter Offline Donation** (highlighted with a dark blue background and a mouse cursor). The right column contains: Fundraiser Dashboard, Fundraising Page, Online Forms, Mobile Experience, Teams, Team Categories, Sign Up Form, Social Media Settings, and **Enter Offline Donation** (highlighted with a dark blue background and a mouse cursor).

3. Click the **Add Multiple** Button on the top right

The screenshot shows the 'Enter Offline Donation' form for the activity 'TEXT2DONATE on 41444 (Active)'. The form has a sidebar on the left with navigation options: Keyword, Online Forms, Mobile Experience, Fulfillment, Fundraising Thermometer, GiveLater, GiveLater Buttons, and Social Media Settings. The 'Enter Offline Donation' option is highlighted. The main form area includes a title 'Enter Offline Donation' and a '+ Add Multiple' button. Below the title is a checkbox for 'Make anonymous'. The form fields are: First Name, Last Name, Address, City, State (dropdown), Zip, and Phone. The 'Enter Offline Donation' button is highlighted in dark blue.

4. Click **Browse** to upload your prepared CSV file.
 1. If you do NOT have headers, like Amount, Date, Phone, etc. then select My file doesn't have a header row (include first row in upload), otherwise, leave it unchecked.

5. Click **Next**

Step 1 of 2: Add Records

Upload records from CSV File

Default Offline List.csv Browse

- My file doesn't have a header row (include first row in upload)

Back Next

6. Verify and/or Match the Columns to the correct item.
 - If you have used the headers in the example file, then it should show the proper items.
 - Note: If you leave the Team and Fundraiser columns in the CSV file, and you upload it to a Text to Donate activity, these columns will not be

recognized.

7. Click Confirm to process the file

Step 2 of 2: Match Columns

You're almost done! Let's match the columns in your file to your account records

Phone Number	Amount	First Name	Last Name	Middle Name
8883331231	7290	Abraham	Lincoln	
888-333-1232	\$8,055	John	Public	Q
(888) 333-1233	\$5497	Wilma	Sanders	

Back

Confirm

8. You will be taken back to the Enter Offline Donation Page and told that it is processing.

Your upload is almost done!

Processing your donations in the background. Once completed they will appear in the table below.

Enter Offline Donation

+ Add Multiple

9. Refresh to see when your list is complete and see the new entries below the Offline Donation Entry area.

Your Donations have been uploaded!

Enter Offline Donation

+ Add Multiple

If this is for a Text to Donate activity, and you have the correct settings on the Thermometer, then these entries will show on the Fundraising Thermometer.

If this is a Crowdfunding and Peer-to-Peer Fundraising activity then these entries should now show on the Donor tab if enabled and properly routed to the Campaign/Team/Fundraiser,