

Upload Offline Donations in Bulk

Rallybound allows administrators to add donations in bulk, by uploading a CSV file to the admin panel. To do so, follow the instructions below:

- Log in to your admin panel (at yourcampaign.com/admin)
- Click "Transactions" and then "Donations" in the left sidebar
- Click "Upload CSV" at the top of the window
- Click "Download CSV Sample Template" in the pop up window
- After the Sample Template downloads, open it in your spreadsheet program, and add new donations (with their information) to the spreadsheet*. Important: When editing/adding to the template, do not modify the first row.
- Once you've finished entering your data into the spreadsheet, save it as a CSV file
- Back in the admin panel > "Upload CSV" pop up window, click "Browse", and attach the CSV file you just saved. Then click "Upload".

* Below is the CSV template structure:

- Donor Information
 - Donor ID (optional)
 - First Name
 - Last Name
 - Email
 - Donor Name To Display On Site (donor name override)
 - Address1
 - Address2
 - City
 - State
 - Zip
 - Country
 - Phone
- Admin Comment (for donor) - admin notes on donor record
- Donation Date
- Donation Amount
- Donation Type (General, Team or Member donation)
- Donation to Member ID (ID of member)
- Donation to Team ID (ID of team)
- Donation to Goal ID (goal ID if known)
- Payment Information
 - Payment Type (Check Cash OfflineCreditCard Wire or InKind)
 - Transaction ID (for OfflineCreditCard and Wire payments)
 - Check Number
- Donation Settings
 - Donation Message (to display on site)
 - Donation Is Verified (true or false)
 - Donor's Name Is Anonymous (true or false)
 - Donation Amount Is Anonymous (true or false)
 - Donation Is Corporate Sponsorship (true or false)
 - Donation Is Pledge (true or false)
 - Admin Comment (for donation) - admin notes on donation record
 - Dont Sync (true or false) - sync to Salesforce
- Any other custom field on donation