



Batch Upload Offline Gifts to Convio

Overview: Tracking offline donations at the participant level on Convio is required for every event. Online donations are automatically tracked and offline donations can be tracked through individually adding each donation or batch uploading the gifts to your event’s website. This document will walk you step by step through the batch upload process.

Preparing the Batch Upload File:

- 1) You will be using the participant ID (PART_CONS_ID) to credit individuals their offline donations. To get each registered participant’s ID log into the Event Management Center> Reports> Pull the Offline Gift Upload Report.
- 2) Next, you will need to create your event specific gift upload file using the sample gift upload file located on your event’s managemyrelay.org site.
- 3) For the file to upload successfully you must save the file as a .csv, include all required data, and have the correct column headings.

Required Information:

Column Header:	Date Requirement:
Gift_Amount	Number must appear without spaces and a dollar sign. (Ex: 50.34, 5.78, or 1000.53)
Gift_Date	If you leave this field blank it will default to the day of the upload. (Ex: 2/15/2011)
Gift_Confirmed	True for confirmed (received / deposited) gifts; False for unconfirmed (promised / not deposited) gifts. If left blank it will default to False.
Payment_Type	Fill in with cash or check (Note: text must be lower case). If left blank it will default to cash.
Part_Cons_ID	The ID is available on the Offline Gift Upload Report. Each participant has an ID. This field needs to be left blank if the donation is being credited to a team or the event.
Team_ID	The ID is available on the Offline Gift Upload Report. Each team has an ID. This field needs to be left blank if the donation is being credited to a participant or the event.
Donor_Cons_ID	ID <u>9534690</u> will upload the donor Offline Gifts . Leave blank if you are filling in Donor First & Last Name.
Donor_First_Name	Leave blank if you filled in the Donor_Cons_ID.
Donor_Last_Name	Leave blank if you filled in the Donor_Cons_ID.

Upload Your File

1) Upload Name: After you have saved your .csv file go to Event Management Center> Customer Service> Click Upload Registration and Gifts> Click Upload Gifts> Input Name of your Upload (Ex: Initials “MD” Date “2-18-11” Gift Upload) or leave as default.

2) Test Mode Only: The option is available to run your upload in test mode first. This is highly recommended for verifying your information before

uploading it to the system. The test function will allow you to identify any errors that may be present so they can be fixed before doing the actual upload. To run in test mode, check the box for “Yes, run this in test mode only.” From this point on, the steps are the same as fully uploading the file.

3) Allow Event Gifts: Check this option if you are uploading event gifts in the upload.

4) Relaxed Duplicate Checking: It is very important to leave this box UNCHECKED to avoid duplicates that might have been accidentally entered when configuring you spreadsheet.

5) Confirm Existing Gifts: Do not check this box. It will try to match unconfirmed gifts with the gifts you are uploading.

6) Address Matching Criteria: Uncheck all of these boxes since you are providing Participant and Team IDs.

Customer Service > Upload Registrations and Gifts > Upload Gifts

1. Set Options

2. Upload File

* 1. **Upload Name:**
Identifies this Upload operation on the Upload List (Note: Consider describing the content, such as RegistrationPriorTo081809)

2. **Test Mode Only:**
Enables you to check your data for errors before creating or changing constituent information with it
 Yes, only check the data for errors without processing it

4. **Event Gifts Allowed:**
Determines whether a gift given directly to the event (that is, no participant or team is specified) in this Upload is added as a gift or results in an error
 Yes, process an event gift in this Upload

5. **Relaxed Duplicate Checking Enabled:**
Determines whether to process a gift in this Upload that matches an existing gift from the same donor recorded on the same date and for the same amount to the same participant, team, or the event (Note: Enable this only if necessary to avoid processing errors.)
 Yes, process gifts from this Upload that may be duplicates

6. **Gift Confirmation:**
Determines whether to change the status from Unconfirmed to Confirmed for a gift from this Upload that matches an existing gift from the same donor for the same amount and date on an unconfirmed gift list (instead of creating a new gift record)
 Yes, confirm gifts from this Upload that match existing unconfirmed gifts

7. **Address Matching Criteria:**
Selects the address information to match in the contact records of existing constituents in order to determine if a participant in this Upload is already a constituent on your site
 Street 1
 Street 2
 City
 State/Province
 Zip/Postal Code
 Country

[Next](#) or [Cancel](#)

Click **Next**> Use the Browse button to find your **.csv** batch upload file> Click open and the file name will be displayed in the field> Click **Finish**> Your page closes and redirects you to the Upload List Page with your file in the list and **Uploading** as the **Status**> Click **Refresh this page** until **Complete** displays as the **Status**

****Click Review** under the Action Column to display the upload results. This will give you a summary of your upload including number of gifts added and total of all gifts uploaded. ******

**** If your uploaded file contains errors (Ex: Status is Complete with Errors) review the Gift Upload Errors document on managemyrelay.org under the 2011 Online Chair Resources. ********