Importing Offline Donations from a CSV File

Category: Offline Donations
Published: Nov 03, 2026
Reading Time: 9 min

Got a pile of checks, cash or match-day pledges for many participants? You don't have to enter them one at a time. Fill in a spreadsheet, upload it, check the preview, and MyEvent adds every donation to the right participant or team in one go.

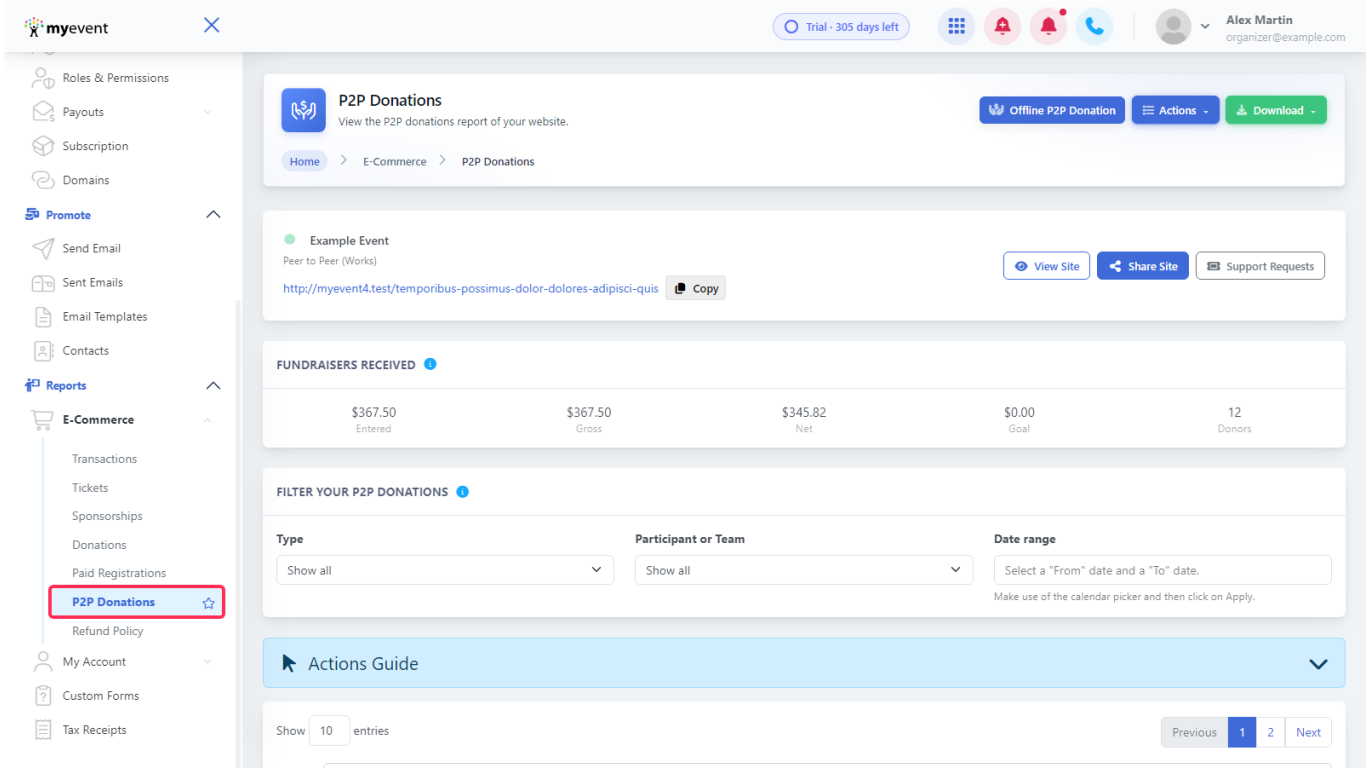
> **To get this feature, contact support.** Offline donation import is turned on for each website by the MyEvent support team. If you don't see the **Actions** button described below, contact support and ask them to turn on offline donation import for your website.

Before you start

- Every imported donation is saved as an **offline donation**: by **check** if you fill in a check number, otherwise as **cash**. Offline donations count toward participant, team and event totals like donations you enter by hand.
- **Donors are not emailed.** The import doesn't send receipts or thank-you emails to donors. Only you (the person who uploaded the file) get an email when the import is done.
- **Nothing is imported until you confirm.** After you upload, you see a preview of every row and what it matched.
- **You can undo a whole import** later if something went wrong.

Step 1: Open the P2P Donations report

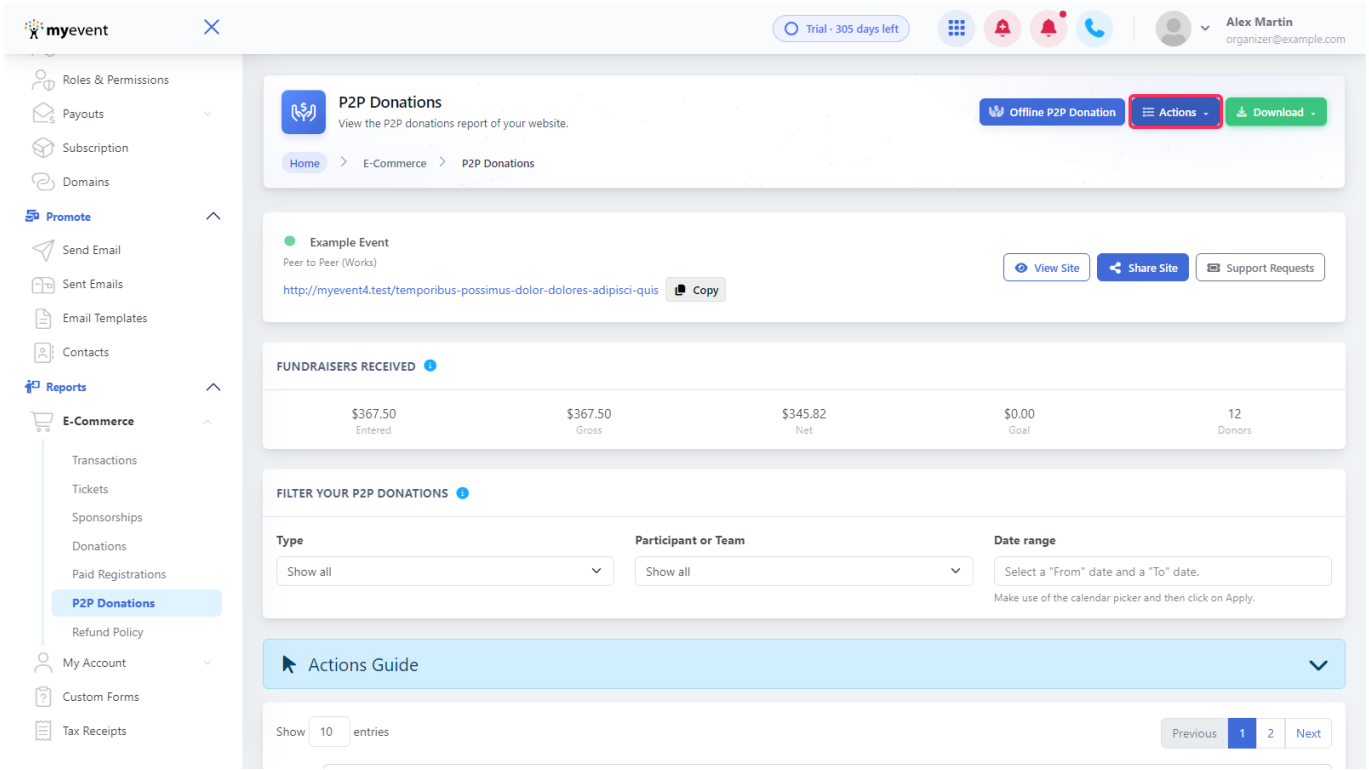
In your dashboard, go to **Reports → E-Commerce → P2P Donations**. (The same tools are also on **Reports → E-Commerce → Donations**.)



The P2P Donations item in the dashboard menu

Step 2: Open the Actions menu

At the top right of the report, click **Actions**.



The Actions button at the top of the P2P Donations report

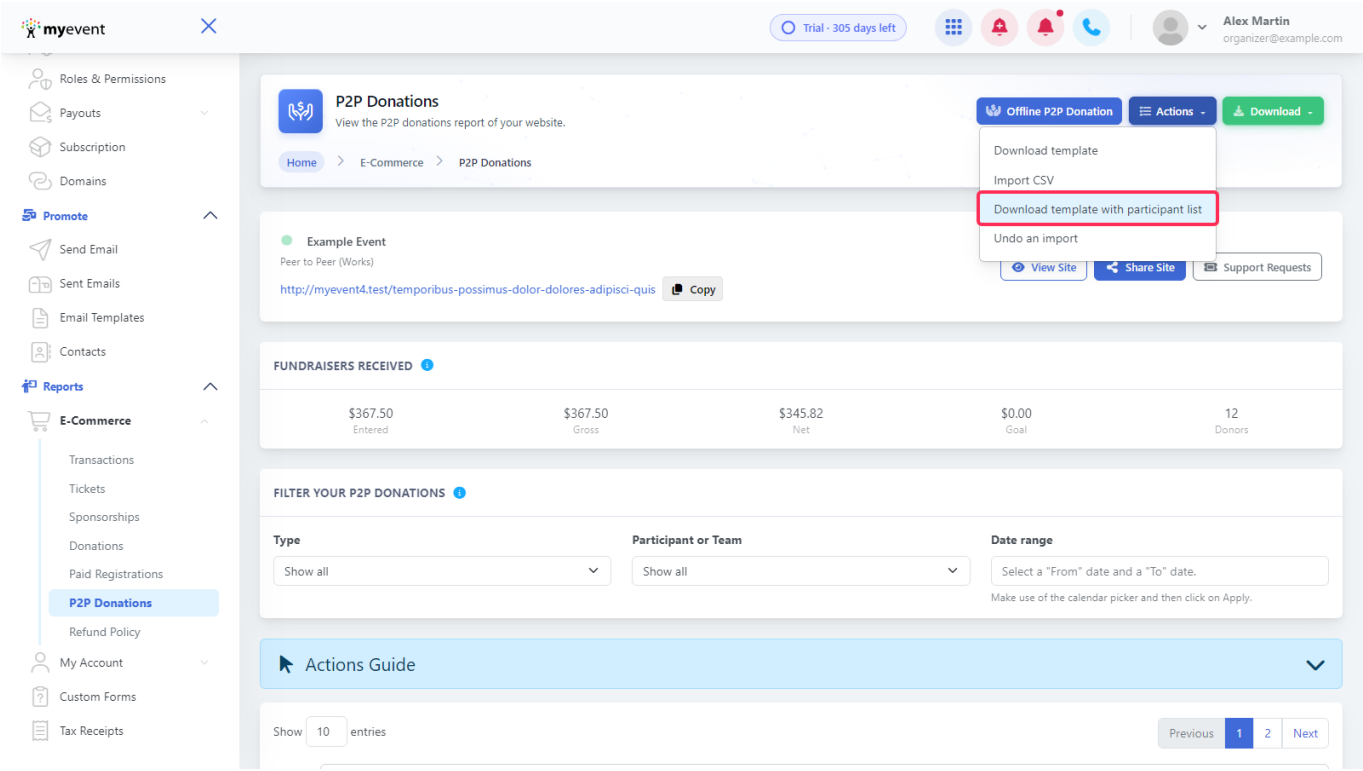
The menu has four options:

- **Download template**: a blank spreadsheet with all the columns.
- **Import CSV**: upload your filled-in file.

- **Download template with participant list**: a spreadsheet that already lists every participant on your website.
- **Undo an import**: remove all donations from an earlier import.

Step 3: Download a template

For a match day, or any time you're crediting many participants, click **Download template with participant list**. Each participant already has a row with their name, email, participant ID (profile_id) and team filled in, so you only need to type the amounts and donor details. Rows you leave without an amount are skipped.



Download template with participant list in the Actions menu

To start from an empty file, choose **Download template** instead.

Templates start with lines beginning with **#**: an instructions line (and, in the blank template, an example). Lines starting with # are ignored, so you can leave them. Files made with the old template (first_name, last_name, email…) still work.

Step 4: Fill in the spreadsheet

Open the file in Excel, Google Sheets or Numbers, fill it in and save it as **.csv**. Keep the column titles exactly as they are. Column order doesn't matter.

Column reference

Column	Required?	What it does	Format	Example
participant_first_name	Conditional: with participant_last_name, when there's no participant_email or profile_id	Participant's first name, used to find who gets credit	Text	Franz
participant_last_name	Conditional: with participant_first_name, when there's no participant_email or profile_id	Participant's last name	Text	Purdy
participant_email	Optional (the best way to find the participant)	Finds the participant by email	Email	franz@example.com
profile_id	Optional	Participant ID. When filled, it wins over all other participant columns	Number	1915
group_name	Optional	Exact team name. Use it alone for a team-only donation	Text (exact name)	Team Blue
group_id	Optional	Team ID. Wins over group_name	Number	134
amount	**Required** (the only column the file must have)	Donation amount	Numbers only	50.00
donation_date	Optional (today if empty)	Date the donation was received	YYYY-MM-DD	2026-10-31
donor_first_name	Conditional: with donor_last_name, unless donor_company_name is filled	Donor's first name	Text	Pat
donor_last_name	Conditional: with donor_first_name, unless donor_company_name is filled	Donor's last name	Text	Placeholder
donor_company_name	Conditional: required if there's no donor first and last name	Company that gave (for example, a matching sponsor)	Text	Example Matching Co.
donor_email	Optional	Donor's email (not the participant's)	Email	pat@example.com
donor_phone	Optional	Donor's phone	Text	555-555-0100

Column	Required?	What it does	Format	Example
check_number	Optional (cash if empty)	Check number. When filled, the donation is recorded as a check	Text	1001
message	Optional	Donor's message for the participant	Text	Go team!
anonymous	Optional (not anonymous if empty)	Makes the donation anonymous	1 (also yes, y, x, true, oui)	1
donor_address	Optional	Donor's street address	Text	123 Main St
donor_city	Optional	Donor's city	Text	Toronto
donor_state	Optional	State or province code	Code	ON
donor_country	Optional	Country code	Code	CA
donor_zip	Optional	ZIP or postal code	Text	M5V 1A1

Who gets credit: the rules

The donor. Every row with an amount needs a donor: either **donor_first_name and donor_last_name**, or **donor_company_name**. A first name alone isn't enough.
The participant. To credit a participant, fill in **one** of these:

1. **participant_email** (recommended). Upper/lower case and extra spaces don't matter. You don't need the names when you give an email. If you do fill in the names too, they must match that participant.
2. **participant_first_name and participant_last_name**, both of them. If two participants have the same name, the row is flagged and you need to add participant_email or profile_id.
3. **profile_id**, the participant ID. It's optional, but when it's filled it wins over the other participant columns, and the names aren't checked.

The team.

- A donation to a participant always goes to that participant's own team. You can leave group_name and group_id empty. If you fill in a team that isn't the participant's team, the row is flagged.
- To credit a **team only**, leave all participant columns empty and fill in **group_name** (exact team name, case and spacing don't matter) or **group_id**. If both are filled, group_id is used. If two teams share the name, use group_id.
- If you leave all participant and team columns empty, the row is imported as a general donation to the event.

Amounts. Numbers only, for example `50` or `50.00`. Spaces and `$`, `€` or `£` signs are removed, and `1,234.50` is read as one thousand two hundred thirty-four fifty. A comma followed by one or two

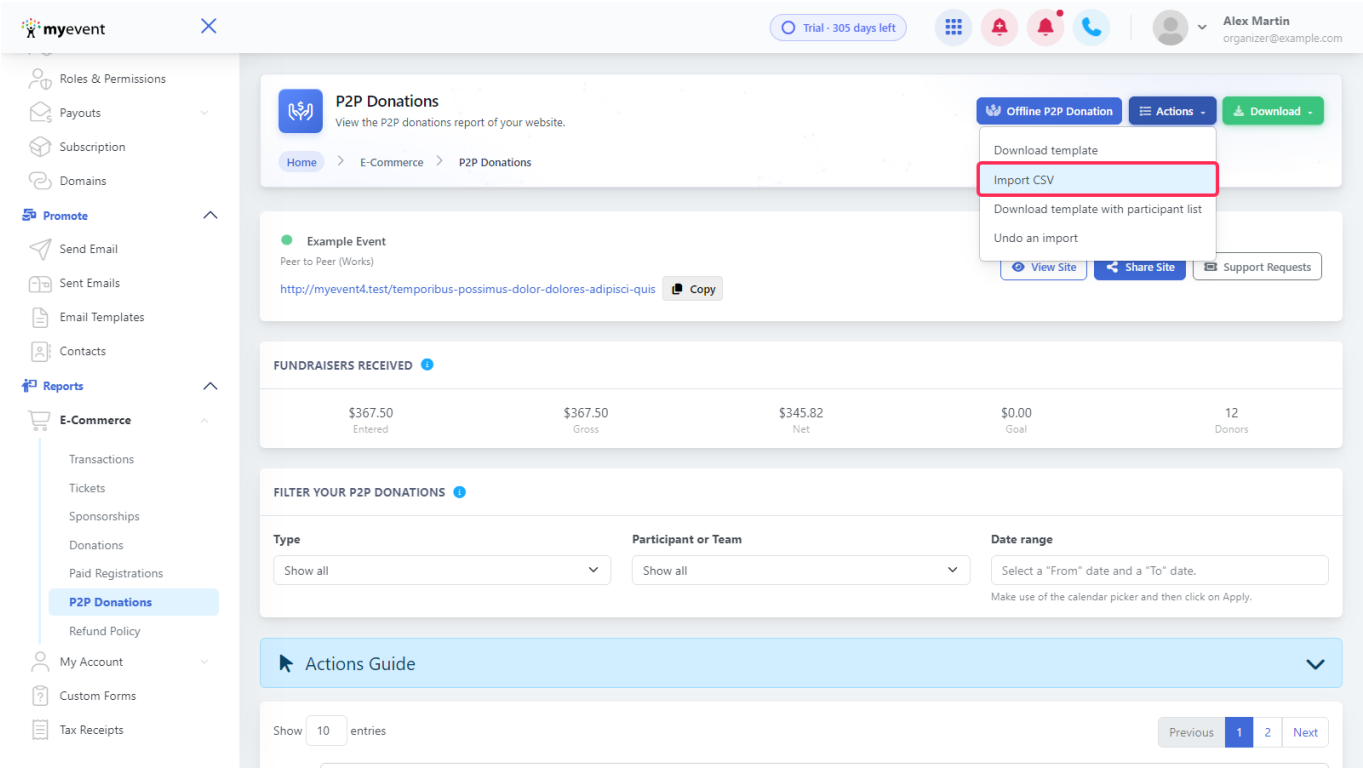
digits (`50,25`) is read as a decimal. The amount must be more than zero.

Dates. Use **YYYY-MM-DD** (for example `2026-10-31`). Other common date formats usually work too. Dates are read in your website's time zone. Future dates aren't accepted. Leave the date empty to use today's date.

Blank values. Empty date = today. Empty check_number = cash. Empty anonymous = not anonymous. A row with no amount and no donor is skipped. A row with a donor but no amount is flagged.

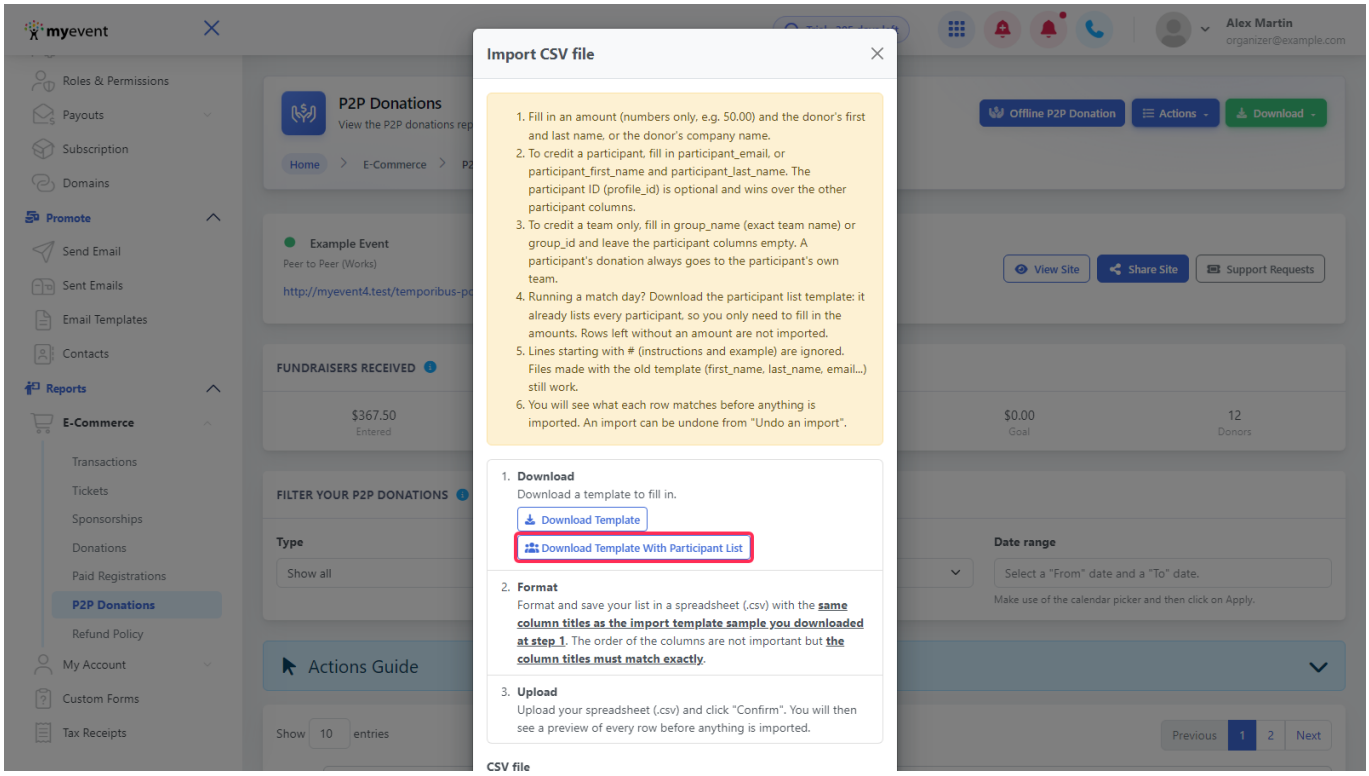
Step 5: Upload the file

From **Actions**, click **Import CSV**.



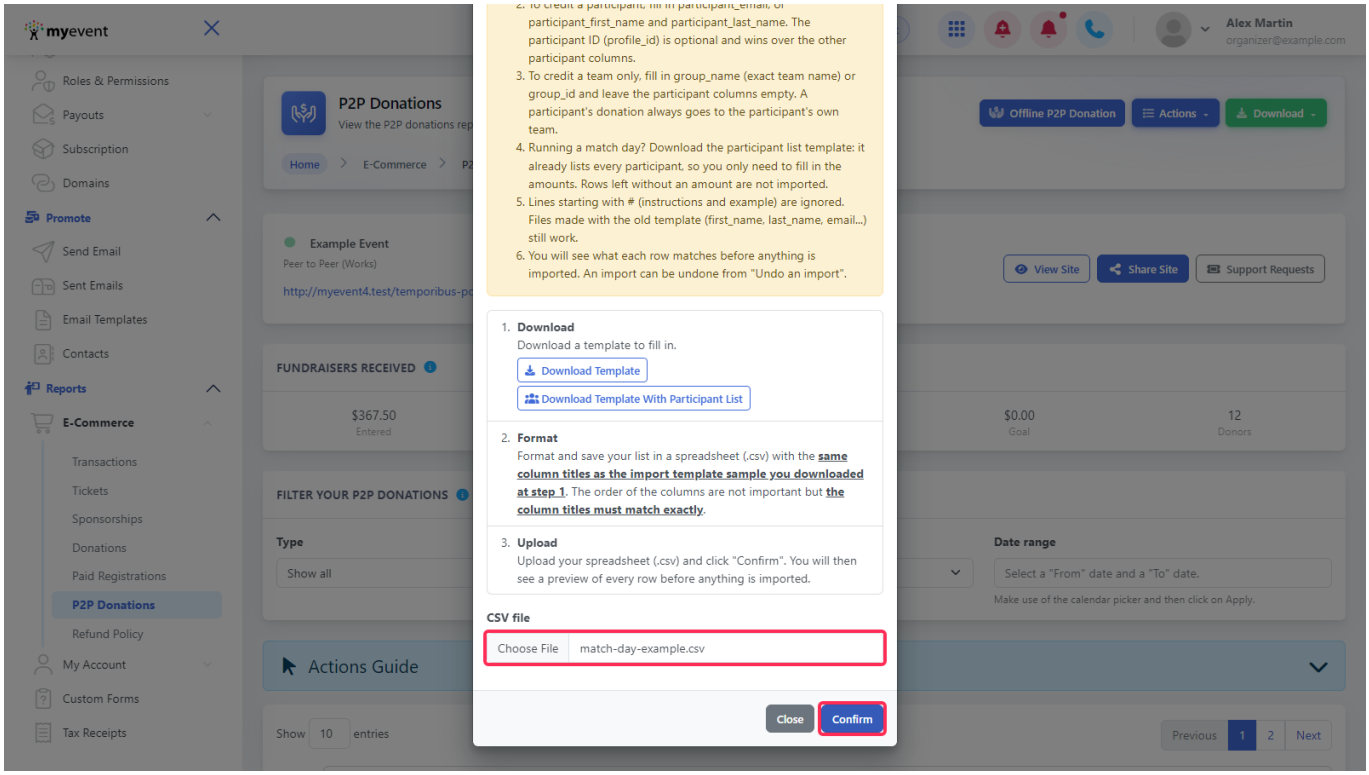
Import CSV in the Actions menu

The **Import CSV file** window repeats the main rules. Both templates can also be downloaded from here.



The Import CSV file window with the template download buttons

Under **CSV file**, click **Choose File**, pick your .csv (max 10 MB) and click **Confirm**.

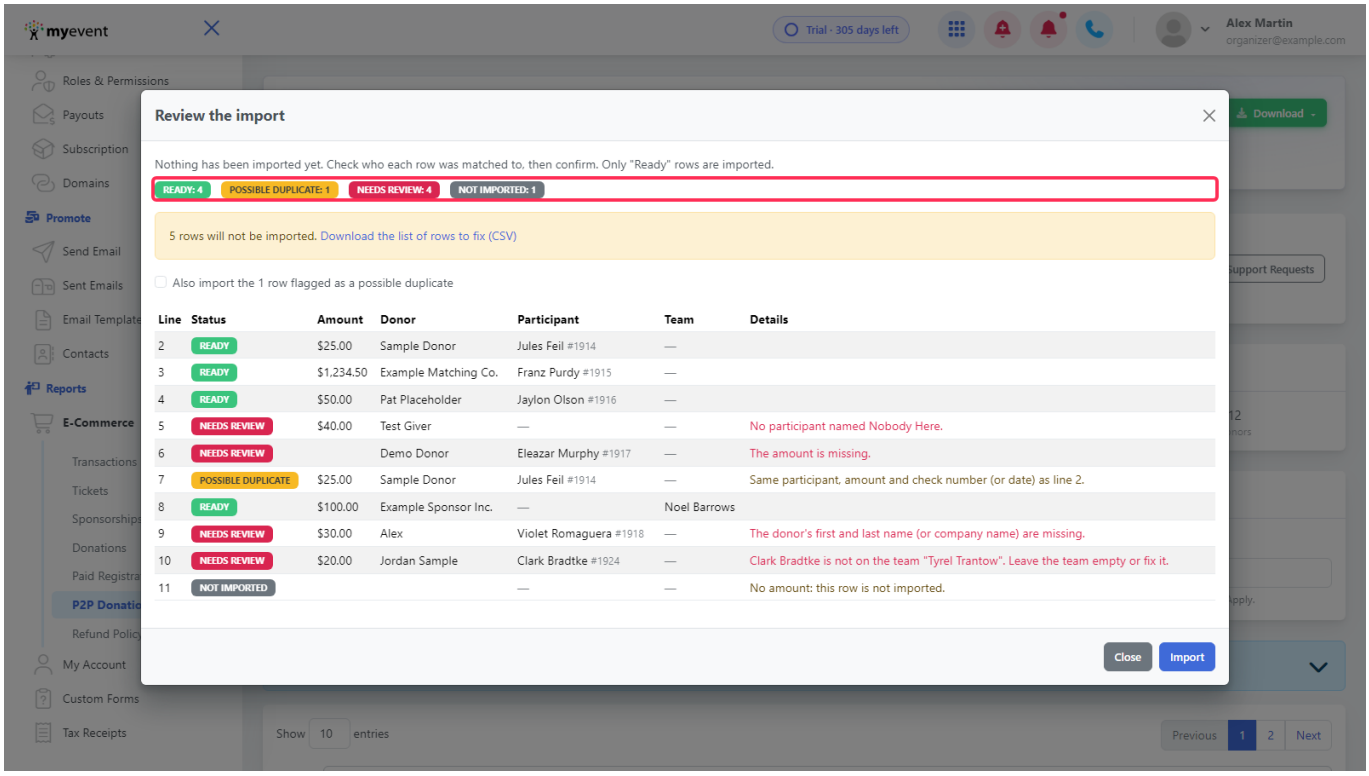


Choose File and the Confirm button

If the **amount** column is missing, you'll see "The file is missing required column(s): amount." Add the column and upload again.

Step 6: Review the preview

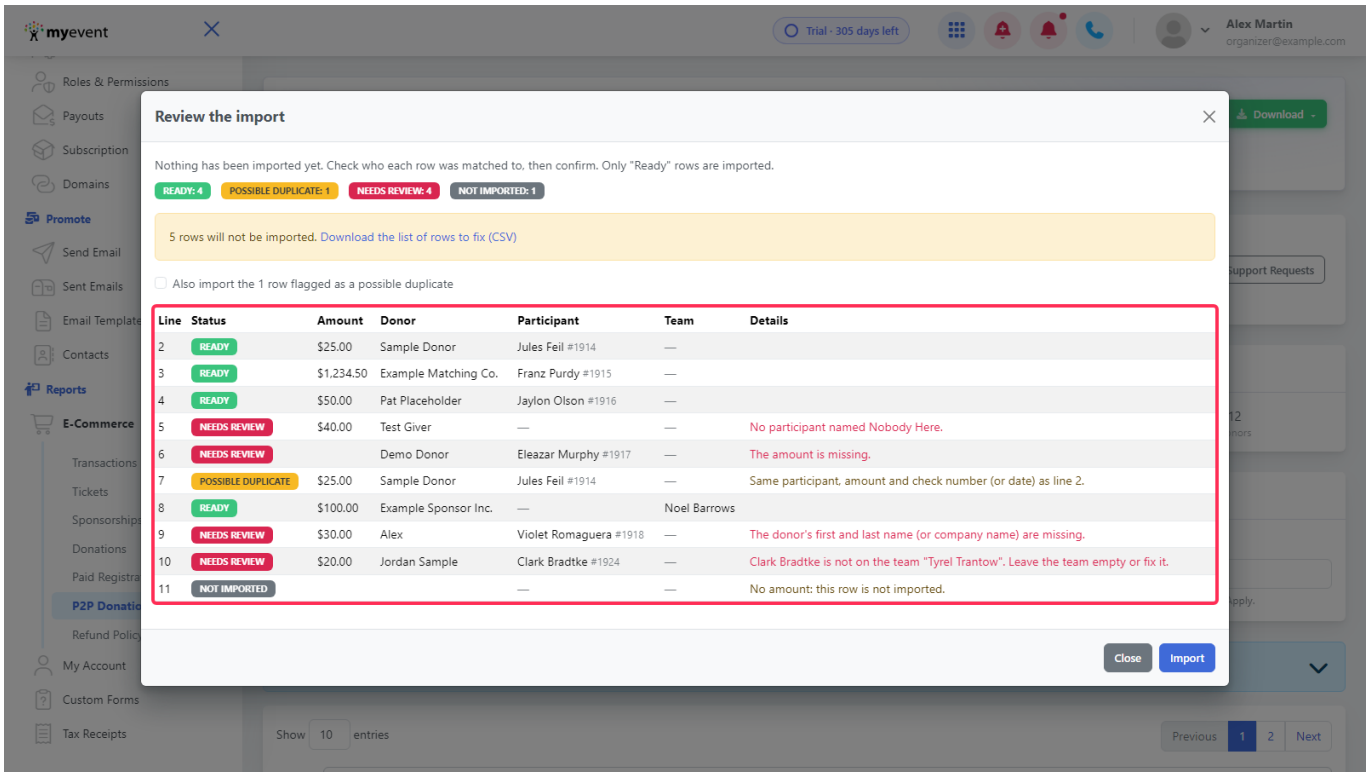
The **Review the import** window shows what each row matched. **Nothing has been imported yet.** The counts at the top show how many rows have each status:



Status counts at the top of the preview

Status	Meaning
Ready (green)	Will be imported.
Possible duplicate (yellow)	Looks like another row in the file, or an offline donation already on your site (same participant, amount and check number, or date). Not imported unless you tick the box in Step 7.
Needs review (red)	Has a problem and won't be imported. The **Details** column says why.
Not imported (grey)	No amount and no donor, so the row is skipped.

For each row, the table shows the line number in your file, the status, amount, donor, the participant it matched (with their ID), the team and the details.

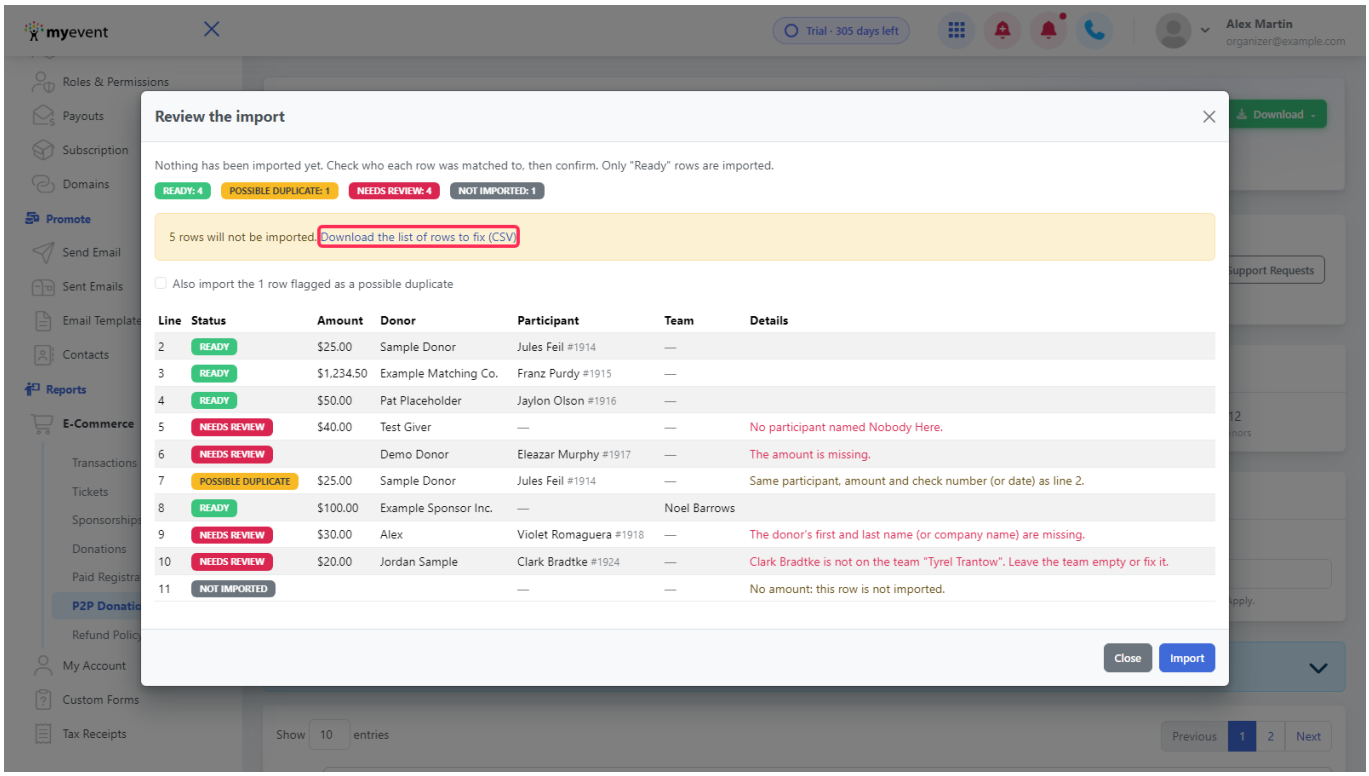


The preview table with Ready and flagged rows
Common messages under Details:

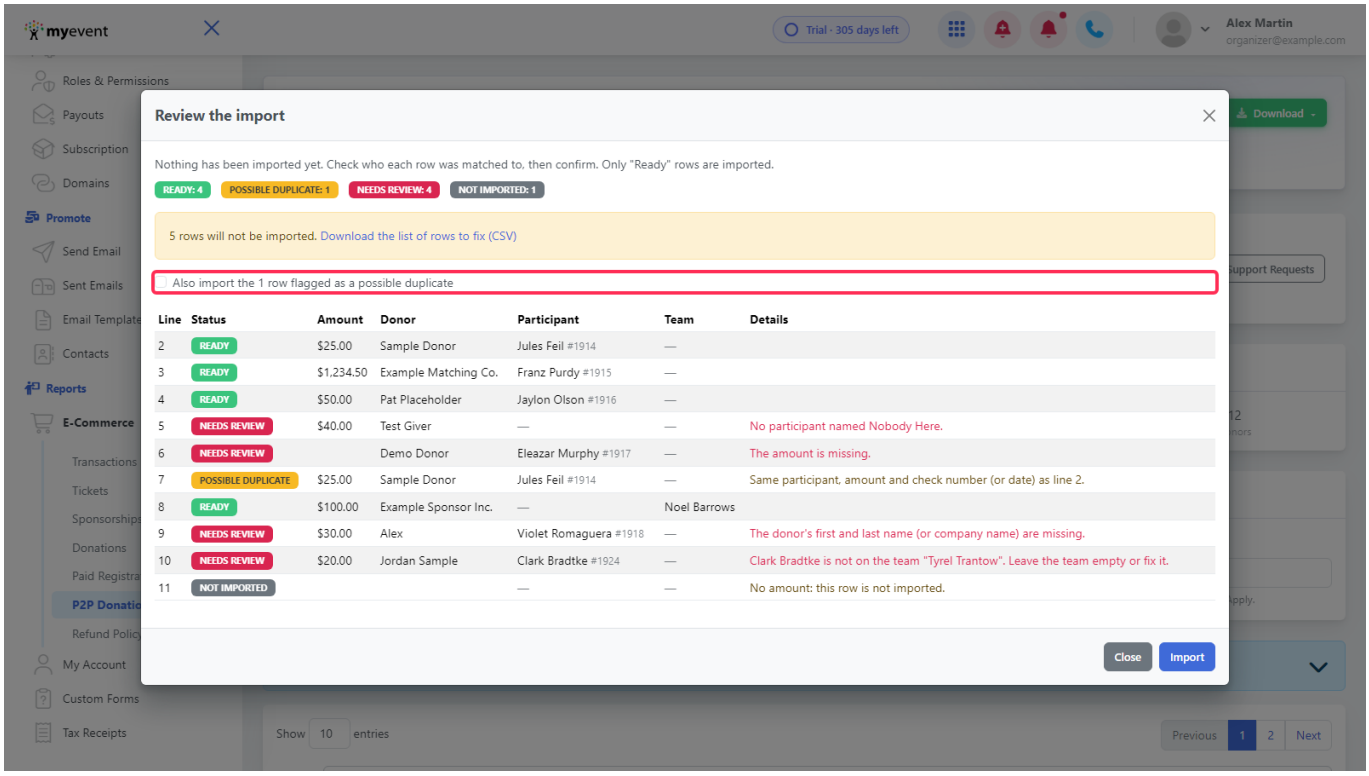
- "No participant named …": check the spelling, or use participant_email.
- "… participants are named …": add participant_email or profile_id.
- "The amount is missing." or "… is not a valid amount."
- "The donor's first and last name (or company name) are missing."
- "… is not on the team …": leave the team empty or fix it.
- "The date … is not valid. Use YYYY-MM-DD."

Step 7: Fix flagged rows (optional)

Click **Download the list of rows to fix (CSV)** to get only the rows that won't be imported. Each row has its line number, status and reason, followed by the usual template columns. Fix them and upload that file as a new import later.



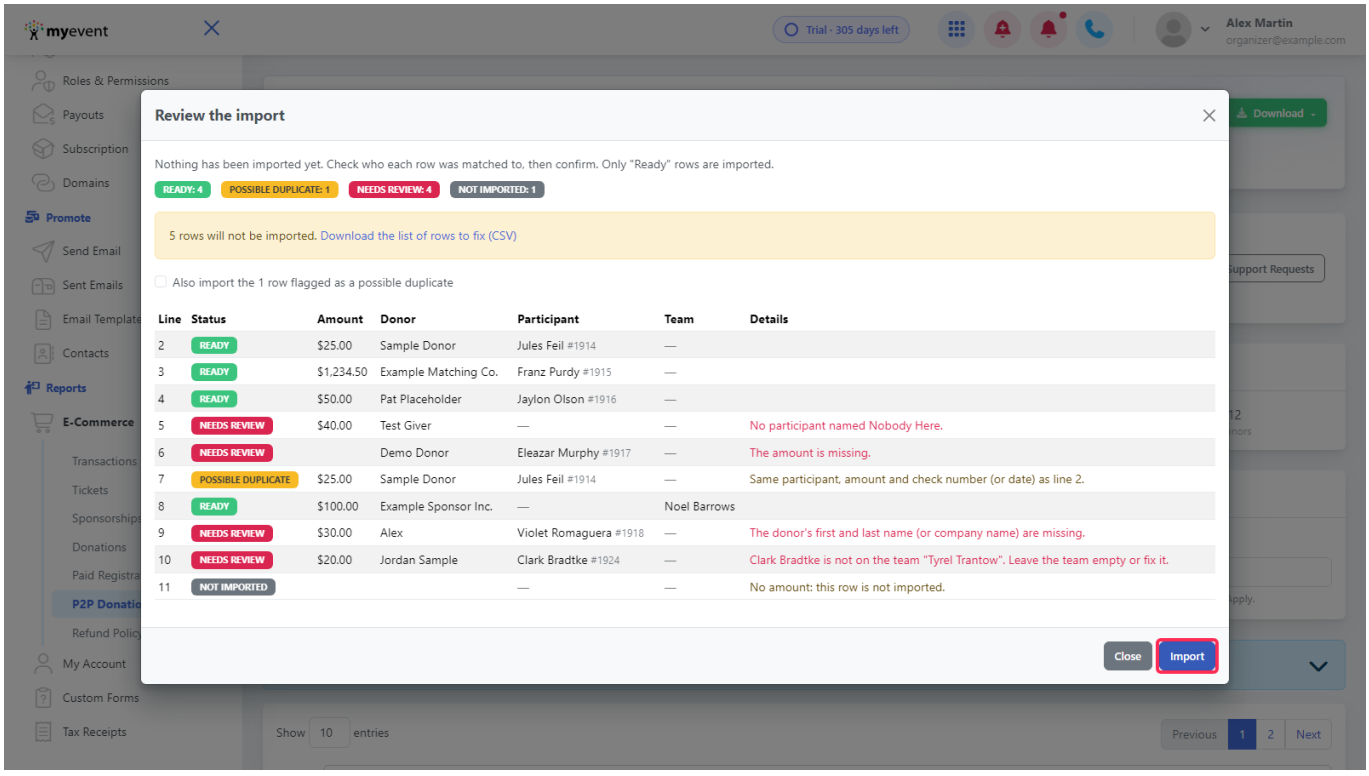
The Download the list of rows to fix (CSV) link
If the possible duplicates really are separate donations, tick **Also import the … rows flagged as possible duplicates**.



The Also import possible duplicates checkbox

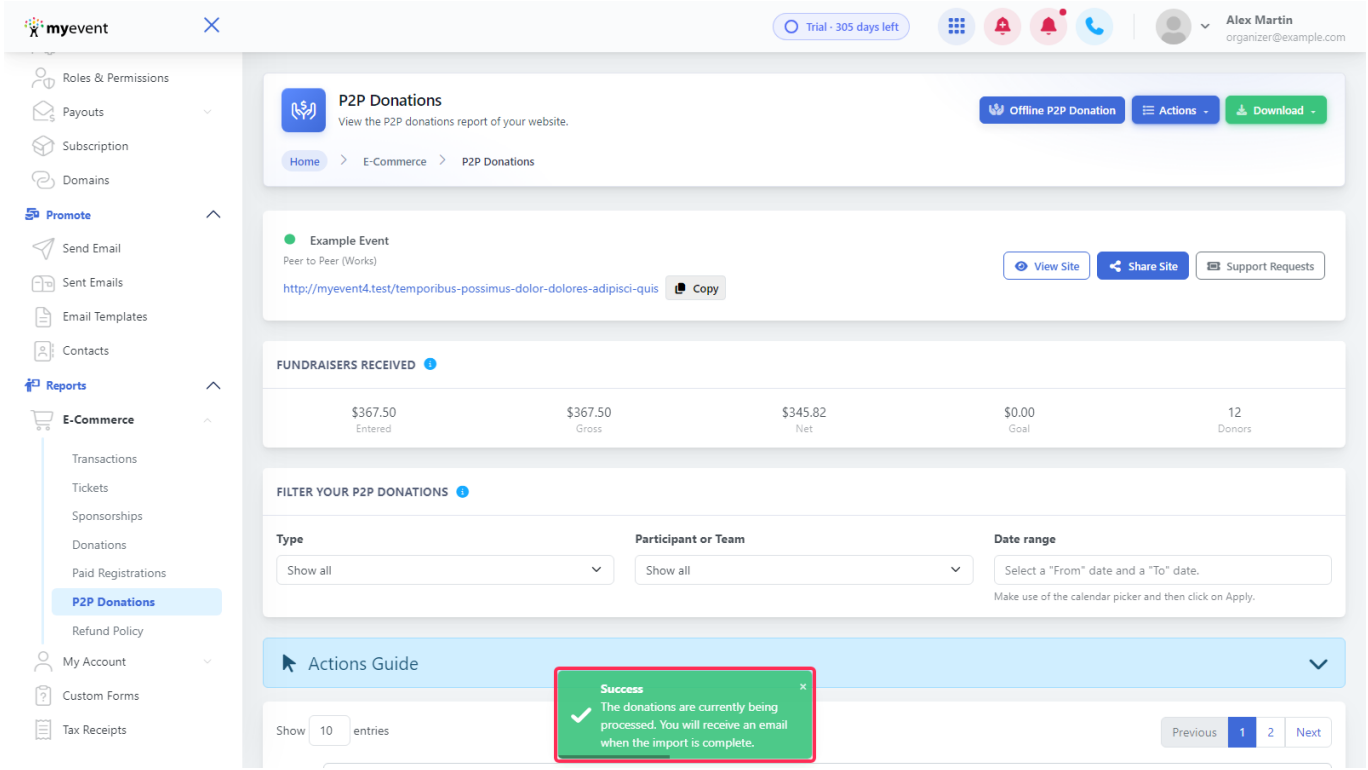
Step 8: Confirm the import

Click **Import**. Only Ready rows are imported, plus possible duplicates if you ticked the box. (The Import button doesn't appear if no row can be imported.)



The Import button

You'll see "The donations are currently being processed. You will receive an email when the import is complete."



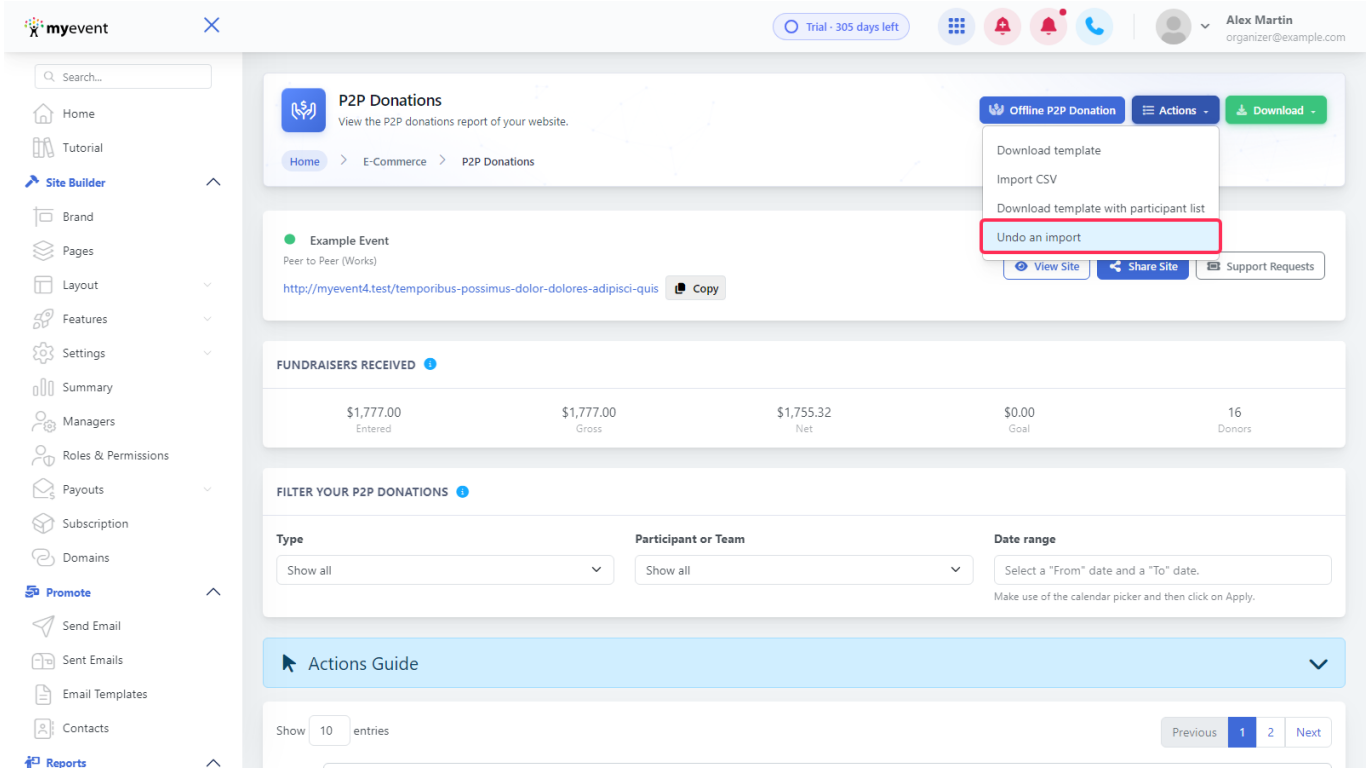
The processing message after clicking Import

When it's done, **you** get an email with the result. Donors don't get any email. The new donations show up in your reports as offline donations.

> The preview only lasts for your current session. If you see "This import preview expired", upload the file again.

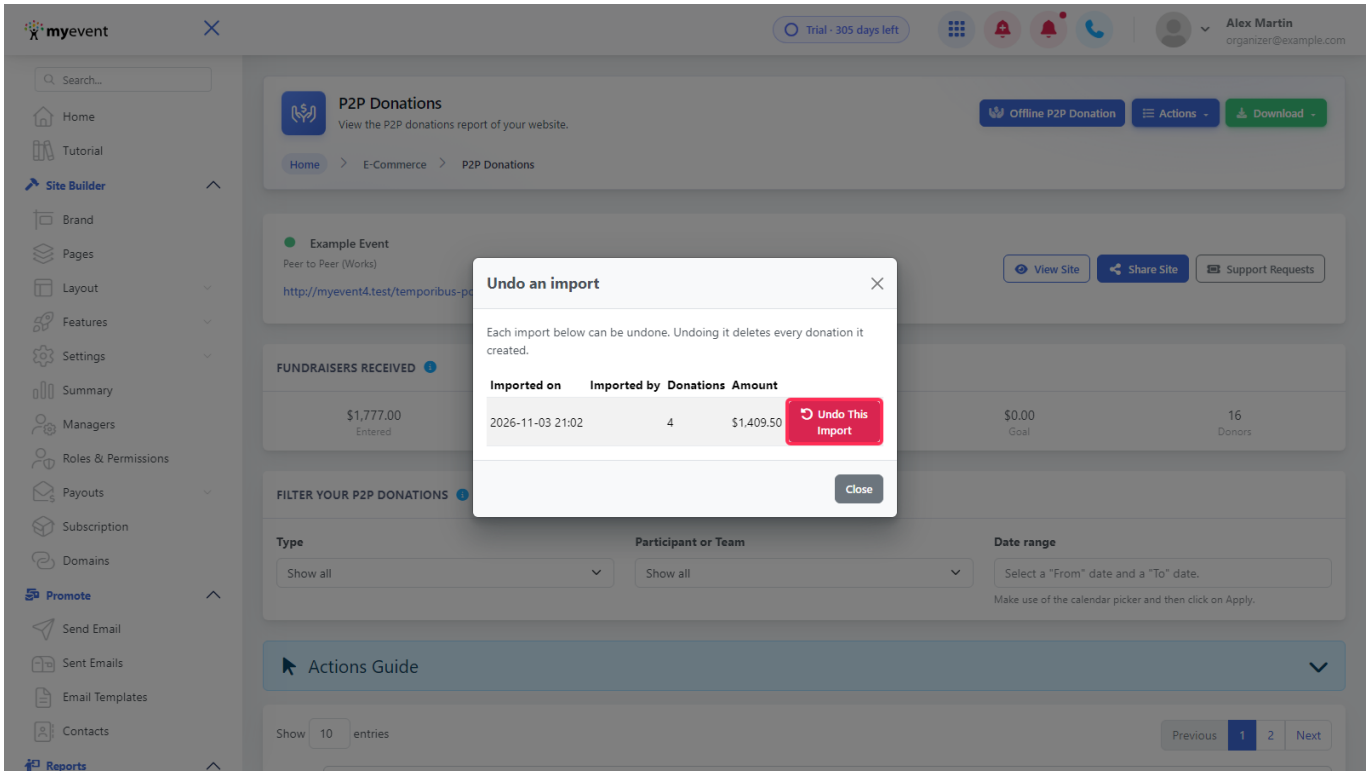
Undo an import

Imported the wrong file? From **Actions**, click **Undo an import**.



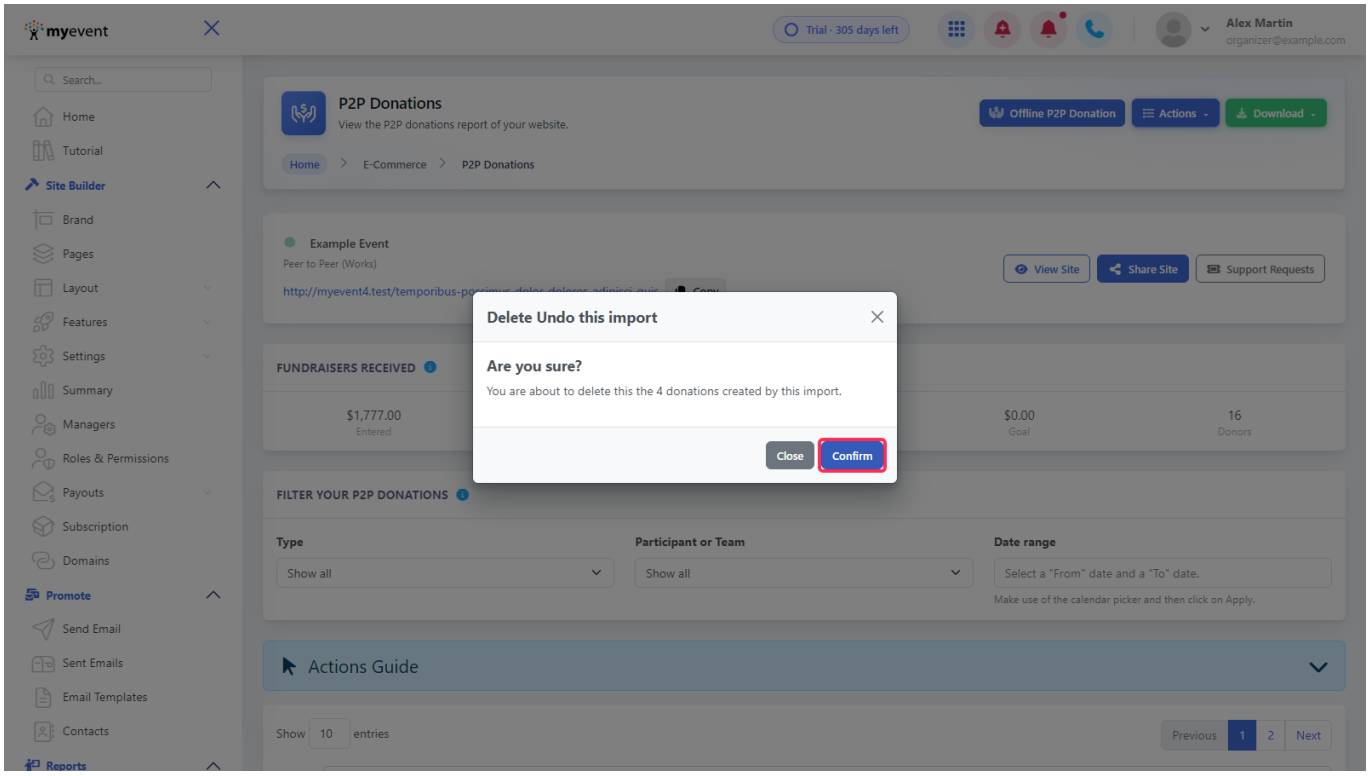
Undo an import in the Actions menu

You'll see your latest imports, with the date, who imported, the number of donations and the total amount. Click **Undo this import** next to the one to remove.



Undo this import next to an import

Click **Confirm**. Every donation created by that import is deleted, and you'll see how many were removed.



The confirmation window

Tips for large files

- Use the **template with participant list**. Rows without an amount are skipped, so you don't have to delete participants who didn't raise anything.
- Use **participant_email** or **profile_id** instead of names. They avoid the "same name" problem.
- Keep the file under **10 MB**. For very large lists, split it into a few files and import them one at a time.
- Fill in **check_number** for checks. It records the payment type and helps catch duplicates.
- Fix what you can before uploading, then use **Download the list of rows to fix** for the rest.
- After a big import, wait for the email before checking totals.