

PAXTON

EST 1979

CHURCH & CHARITY
ACCOUNTING SOFTWARE

Importing Donors

Administration > Getting Started > Import Donors



You can import donors into Paxton from a csv file.

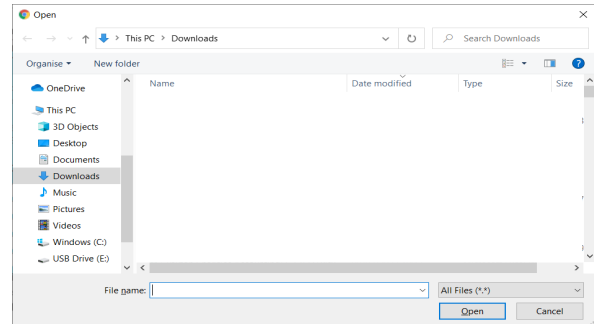
If you're running online then you will need to upload your donor import csv file to the cloud.

Click on the grey tab at the top middle of your browser screen and you will see the following icons:-



Click on the first icon which is 'From PC to server'.

Browse to the location of the file you wish to upload, select the file and click on Open.



Click on the button with the 2 dots next to the 'Import file' field and select your csv file.

The data in your file will be previewed in the grid below:-

Import file

Data Preview | Core fields | Import Report

Import data preview

Reference	Surname	Forenames	Initials	Title	Salutation	Address	P
ALEXJ	Alexander	Jane	J	Mrs	Mrs Alexander	75 Minton Road ^Lincoln	Lf
BENNA	Bennett	Angus	A	Mr	Angus	284 Weldon Road ^Gravesend ^Kent	D
BRADD	Brady	Daniel	D	Mr	Daniel	164 Lenton Street ^Boston ^Lincs	Lf
CARSID	Carstairs	Ian	I D	Mr	Ian	66 Norbury Rise ^Wandsworth ^London	S
EVANJ	Evans	John	J	Mr	Mr Evans	18 Halsey Way ^Dorchester	B
GASDS	Small donations scheme						
HARPLT	Harper	Len Thomas	L T	Mr	Mr Harper	55 Devons Road ^Colchester ^	C
HOLLD	Hollingsworth	David	D	Mr	David	54 Harrow Road ^Doncaster	D
LARSO	Larson	David	D	Mr	David	19 Charrel Drive ^Bristol	B
LEWIP	Lewis	Pauline	P	Mrs	Mrs Lewis	The Red House ^Pebble Lane ^Ross on Wye	G
MISC	Unknown donor						
PARKH	Parker	Howard	H	Mr	Mr Parker	20 Belsize Avenue ^Cambridge	C
PEMBD	Pembury	Diane	D	Mrs	Diane	Plaintrees ^Harbury Way ^Knutsford ^Ches	C
PERCS	Percival	Sally	S	Mrs	Sally	The Grange ^Howden Road ^Lee on Solent	P
ROGESJ	Rogers	Stephanie Jane	S J	Mrs	Mrs Rogers	12 Cross Deene ^Maidstone ^Kent	M
SMITA	Smith	Anne	A	Mrs	Anne	16 Greenwood Road ^Oadby ^Leicester	Lf

Import Exit

Click on the 'Core fields' tab and all the fields that you can import data into will be displayed. Click the down arrow against each field you wish to import and select the corresponding column on your csv file.



You can either import the Donor References from your csv file or tick the 'Auto generate Donor ref' tick box and it will generate the references start. If you choose to auto generate you need to ensure you have the 'Auto donor reference' field set to Y and the 'Next donor number' set in System Maintenance.

Click on Import and click Yes on the confirmation message.

The donors will be imported and any issues will be displayed in the Import Report tab.