

Expenditures can be entered in Crimson Filer in Three Different Ways:

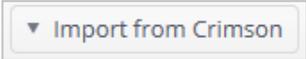
1. Enter all of the information in Crimson and then import it directly into Crimson Filer.
2. Manually enter the expenditures individually into Crimson Filer.
3. Create an Excel document with all expense information and import it into Crimson Filer.

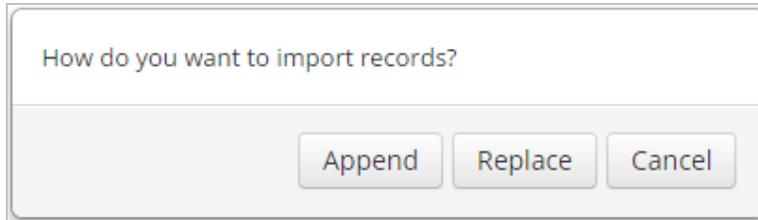
Enter all of the Information into Crimson and Import it into Crimson Filer:

**Please refer to the [Crimson Expenditure Import Guide](#) or the [Expenditure Data Entry Guide](#) for instructions on how to enter expenditures into Crimson.

If you've recorded all of your Expenditures in Crimson, you can export the file out of Crimson using the FEC export, review the file and then follow the steps in #3: **Entering Expenditures by Excel Spreadsheet.**

If you have recorded all of your Expenditures in Crimson and do not need to review/edit your file:

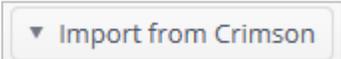
1. Go straight to your report in Crimson Filer.
2. Go to the **Sched B** tab of your report and click .
3. Select the Fund codes that you want to import from Crimson (i.e. P2016, G2016, etc.)
4. Click **Import Now**.
5. You'll be asked, "Are you sure to import now?" When this appears, click **Yes**.
6. When asked,



How do you want to import records?

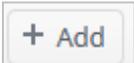
Append Replace Cancel

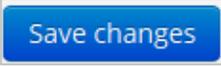
- Click **Append** – if you want to add these receipts to what is already in Schedule B.
- Click **Replace** – if you want this file to delete everything that you have in Schedule B and overwrite the existing data.
- Click **Cancel** – if you do not want to import this file or need to change the mapping.

Please note: You can use  from the **Main page instead of from the **Sched B** tab, but this will import all of your expenses AND all of your receipts.

Manually enter the Individual Expenditures in Crimson Filer:

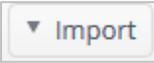
This option can be used to enter expenditures that you do not have recorded in any software or spreadsheets.

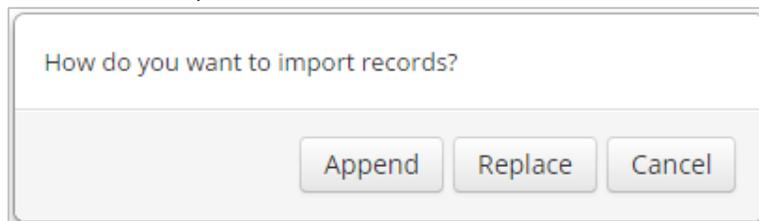
1. To add an expenditure, click .
2. Enter all of the information necessary in the screen that appears (keep in mind there are 5 panels you can expand: **Transaction**, **Candidate**, **Conduit**, **Text**, and **Back Reference**)

3. Click 

Entering Expenditures by Excel Spreadsheet:

We recommend keeping track of this information in accounting software if you are not using the Crimson Expenditure/Disbursements module (under Treasury, in the Compliance view).

1. Save the file in .xlsx or .xls format
2. Make sure your file has the following fields:
 - Unique Transaction ID (**TRAN ID**)
 - Line number (**LINE**)
 - Entity Type (**ENTITYTYPE**)
 - Organization or Individual Name (**LAST NAME, FIRST NAME, or ORGNAME**)
 - Address (**STREET1, STREET2, CITY, STATE, ZIP**)
 - Date (**DATE**)
 - Amount (**AMOUNT**)
 - Transaction Description (**TRANSDISC**)
3. In the report you created in Crimson Filer, go to **Sched B**.
4. Click the  button
5. In **Step 1: Upload File**, choose your file.
6. Click **Step 2: Map Fields** and map each field in your database.
 - If you are going to use this file format frequently, you can save the field mapping by clicking the **Create Mapping...** button. After you have mapped your fields, you can label the mapping (i.e. Expenditures, Disbursements, etc.). You can have as many saved mappings as you need. Then click **Save New Mapping**.
7. Click **Step 3: Validate** and . If validation is not successful, go back and correct any errors in your file and attempt to validate again.
8. If validation is successful, click .
9. You'll be asked, "Are you sure to import now?" When this appears, click **Yes**.
10. You'll then be asked,



How do you want to import records?

- Click **Append** – if you want to add these receipts to what is already in Schedule B.
- Click **Replace** – if you want this file to delete everything that you have in Schedule B and overwrite the existing data.
- Click **Cancel** – if you do not want to import this file or need to change the mapping.