

***NOTE: The Partnership Donor Profile (People Type = R - Partnership) and Gift need to exist in Crimson prior to importing partners.**

1. To import Partnership attributions, use the **People** dashboard **People Search** to find and open the People record and Money Record of the gift you wish to add the partners to.
2. Click **Partnership Attribution Import** on the top of the Page.

Money - Cmdl (PID: 76004120)

Partnership Attribution Import

Gift

Transaction Id# 4358

Batch # 1240

Batch Date 1/18/2022

Amount \$ 500

Fund P2022 - Primary 2022

Account Code N/A - N/A

Channel Unspecified

Source Code CRIMSON - Crimson

Initiative WEB - WEB GIFT

Program INTE - Internet

Payment

Payment Type CH - Check

Check / Card Number

Card Exp Date (mm/yy)

Approval Code

CC Transaction Id

Comment

Adjustment

Adjustment Type

Adjustment Date

Adjustment Amount \$

Fundraiser

Track#

Amount \$

Exception

Exception Code

Exception Date

Adjust

Miscellaneous

Thank You S - "Thank You" is sent

FEC Memo Text


Request a Refund

Add Fundraiser

Attributions

Name	Amount
Brooke Noelle Taylor	\$ 500

Total \$ 500.00

3. In **Step 1: Upload File** click the  button and select the excel file.
4. Select the correct Worksheet/tab from the Excel to use for upload.
5. In **Step 2: Import Type** add the number of gifts and the total amount. Decide if you want to:
 - **Not Overwrite Existing Data** – If this data previously existed it will NOT overwrite and replace.

OR

- **Overwrite existing Data** - If data previously existed it will overwrite and replace the data.
6. In **Step 3: Mapping**, the fields in the first column are the headers from your selected file. The drop-down fields in the second column are fields available in your Crimson database. Use these drop-down options to map fields between your file and Crimson.
 - Use the **Auto Mapping** feature to have Crimson map the fields for you. Make sure you map all of the required fields and check to if they all mapped correctly. For more instructions on what terms will Auto Map, see the [Crimson 3 - Auto Mapping](#) guide.
 - You can also save the mapping to use in the future by clicking **Save**. You can choose **Save to Selected Mapping** (and select previously saved mapping) or **Save to**

New Mapping (and create a new mapping). **Load Mapping** allows you to use a previously saved mapping and **Delete Mapping** allows you to remove a saved mapping.

7. Click **Validate And Import** in **Step 4: Validate and Import**. This step validates that all required fields are included and that the file's format is correct. If successful, the data will automatically import. If not, it will show a list of errors by row.
8. When the import is complete, in **Step 6: Result**, you can click **Output Results** and save the import's results.

*Please note: Refer to the [Crimson FAQ: How do I assign credit to a partner for a partnership gift?](#) for instructions on how to manually apply partnership attributions to a partnership gift.