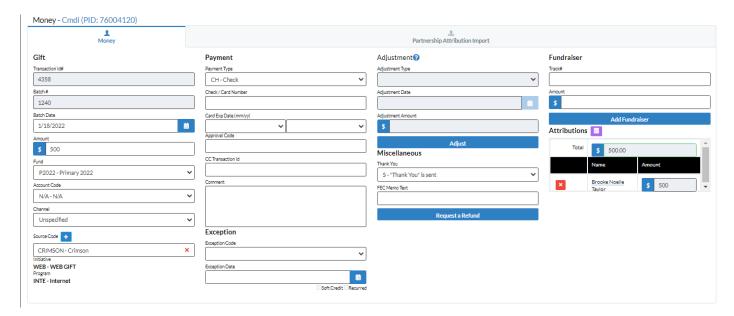


FAQ – How Do I Import Partnership Attributions?

*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.



- 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.
 - O 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 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 <u>Crimson FAQ: How do I assign credit to a partner for a partnership gift?</u> for instructions on how to manually apply partnership attributions to a partnership gift.