

and Attributions

When a committee receives a contribution from a Joint Fundraising Committee (JFC) both the JFC check and the attribution information need to be entered. There are two ways to get the attribution details into Crimson, but first you will want to start by entering the JFC's contribution.

Entering the JFC Donor Record

If the JFC doesn't already exist in Crimson, then use the **Add a Record** dashboard button on the **People Dashboard** to create the record. Be sure to use the **People Type** of **J - Joint Fundraising Committee**.

Entering the JFC Contribution

Rather than using the Data Entry module, you can add the contribution directly into the JFC's people record:

1. Use the **People Search** to find the JFC's record and open its profile.
2. Select the **Giving History** panel to see the **Giving History** panel summary. Click the **Add Gift** button.
3. Enter in the **Amount** of the gift (this should be the actual check/wire amount received from JFC).
4. Complete the remaining fields: **Batch #**, **Batch Date**, **Fund Code** and **Source Code**.
5. Change the Payment Type to **JF – Joint Fundraising Committee** and click **Save**.

Money - Washington Victory Committee (PID: 76004191)

Money

Gift

Transaction Id#
0

Batch #
1125

Batch Date
10/20/2022

Amount
\$ 10000

Fund
G2022 - General 2022

Account Code
N/A - N/A

Channel
Unspecified

Source Code
0001 - TEST1234

Initiative
TESTPKG - TEST PKG

Payment

Payment Type
JF - Joint Fundraising Committee

Check / Card Number

Card Exp Date (mm/yy)

Approval Code

CC Transaction Id

Comment

Adjustment

Adjustment Type

Adjustment Date

Adjustment Amount
\$

Miscellaneous

Thank You
Y - Send "Thank You"

FEC Memo Text

Fundraiser

Track#

Amount
\$

Add Fundraiser

Attributions

Total	Name	Amount
\$ 0		

Importing Attributions



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First, you will need to format the file to fit the following criteria:

1. Must be saved as an excel document.
2. Must have the following required fields:
 - **LAST NAME/ORG NAME**
 - **FIRST NAME**
 - **RECORD TYPE**
 - **AMOUNT**
 - **SOURCE CODE**
3. May also want to include the following fields:
 - **STREET**
 - **CITY**
 - **STATE**
 - **ZIP**
 - **BATCH DATE**

*(**Please note: When used, this batch date will be on the FEC report. If not used then the JFC payment's batch date will be used for all attributions as default).*

4. Remove any superfluous rows and columns.

When your file is ready:

1. Perform a **People Search** to find the JFC record you keyed earlier.
2. Open the contribution that you wish to attribute funds to.
3. Click on the **JFC Attribution Import** tab along the top of the screen.
4. Follow the steps to complete the import. In **Step 1 Upload File**, click on the **Choose a File** section to select the file of attribution details that you saved and the worksheet that should be used. The records should fill into the space below Step 1. ***If no records auto-populate here, please go back and check the formatting of your file.*
5. In **Step 2 Import Type**, enter the **Number of Gifts** and **Total Amount** that is in the excel file. Check the **"If data already existed Overwrite existing data?"** checkbox if you want to overwrite any existing data.
6. Click on **Step 3 Mapping** to begin mapping the column headers in your file to the field names in Crimson. Please see the [Crimson – Auto and Load Mapping](#) guide on the HelpDesk for information on that feature. ***Please note: If you would like to save the mapping to use in the future, click **Save Mapping**.*
7. Next, in **Step 4 Validate and Import**, click the **Validate and Import** button. If there are any errors, fix them in the file and start the import process again with the corrected excel.
8. If there are no errors, the file will automatically import. When the load is complete a message will appear stating, **"# of records imported."** The import is complete.

OR Manually Key Attributions

Manual entry of attributions is very similar to partnership attributions and other adjustments. Before you begin assigning attributions you will need to make sure each of the recipient donors are in



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Crimson. You can do this by using the **Add a Record** feature under the **People Dashboard**. Then take the following steps:

1. Perform a **People Search** to find the JFC record you keyed earlier.
2. Open the contribution that you wish to attribute funds to.
3. Click on the blue **Adjust** button.
4. Choose the adjustment type **AB – JFC Attribution**.
5. Enter the appropriate **Adjustment Date** and **Amount**.
6. Enter the donor's PID or First and Last Name then click the search button.
7. Once the correct donor is located, click **Select**.
8. Now click **Apply** to complete the attribution.
9. Repeat the process for each donor you wish to attribute funds to.