Importing – Lists to Append Records

Formatting Your File

Please check that your file fits the following formatting and field requirements before loading:

- Must be saved as an Excel file.
- Every record must have a **Last Name** and the record's **ID Number (PID)** because they are required fields.
- Scan file for odd characters (such as quotes) and formatting discrepancies (such as different alignments for cells) that may cause problems with the load.

Importing Your File

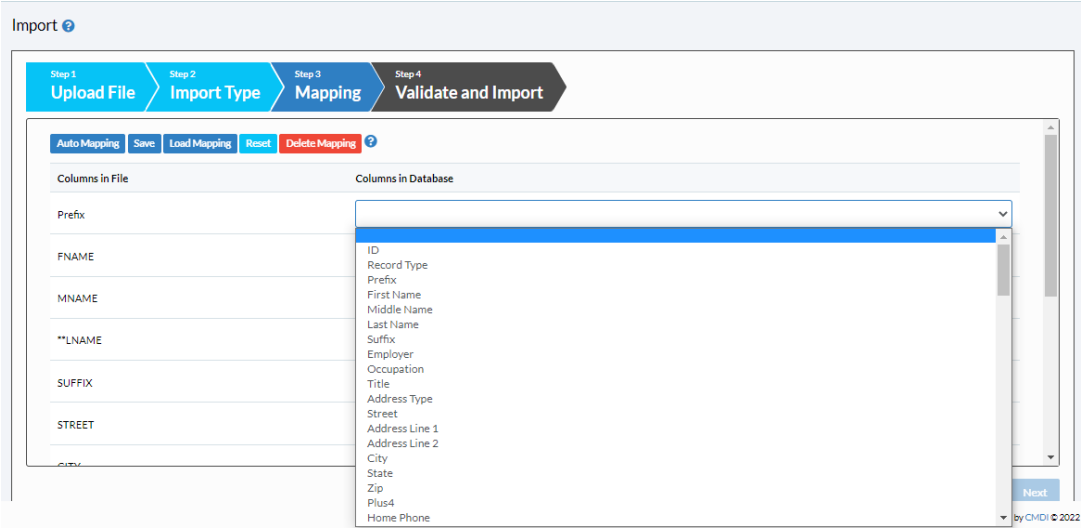
1. To import, navigate to the **People Dashboard** and then select **Import** from the **Dashboard Navigation Bar.**

2. In **Step 1: Upload File,** click the

button and select your excel file from your computer or click and drag the file you want to import into that area. Then, select the worksheet from the excel file that will be uploaded.

3. In **Step 2: Import Type**, choose the import type of **Append to existing records (ID is required)** from the drop-down menu.
    - If you would like the data in your import file to overwrite the data already existing for records in Crimson, check the **If data already existed Overwrite existing data?** checkbox.
    - If you would like the data in Crimson to take precedence over any new data in your import file and only have the data be appended, do not check the checkbox **If data already existed Overwrite existing data?** checkbox.

4. 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.
    - Or you can use the **Auto Mapping** option for Crimson to auto map fields for you, but confirm that the fields were mapped correctly afterwards and that all of the required fields were mapped.



- You can save your mapping to be used 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 option). **Load Mapping** allows you to use a previously saved mapping and **Delete Mapping** allows you to remove a saved mapping.

5. Click the **Validate and Import** button 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 records will be imported**.** To save the validation file after loading, click **Output for Review**.

6. If there were any errors in your load, they will appear and an option to **Output for Review** will also appear. You will need to fix the errors in your file and then attempt to import again.

Notes on Mapping: Field Definition

- Record Types:
  - **I = Individual**
  - **C = Candidate Campaign Committee**
  - **P = Multi-Candidate PAC**
  - **S = State or Local Party Committee**
  - **O = Non Multi-Candidate PAC**
  - **N = National Party Committee**
  - **R = Partnership & LLC**
  - **T = Other**
  - **M = Non-Federal Committee**
  - **J = Joint Fundraising Committee**
  - **D = Indian Tribe**

- Street = Main address field, Address 1 & Address 2 = Additional address info (Ste. #, Apt. #, Floor, PO Box, etc.)