crimson

Importing New Contributions

To import new contributions, click the 📤 icon in the **Dashboard Navigation Bar** on the **People** or **Fundraising Dashboards**.
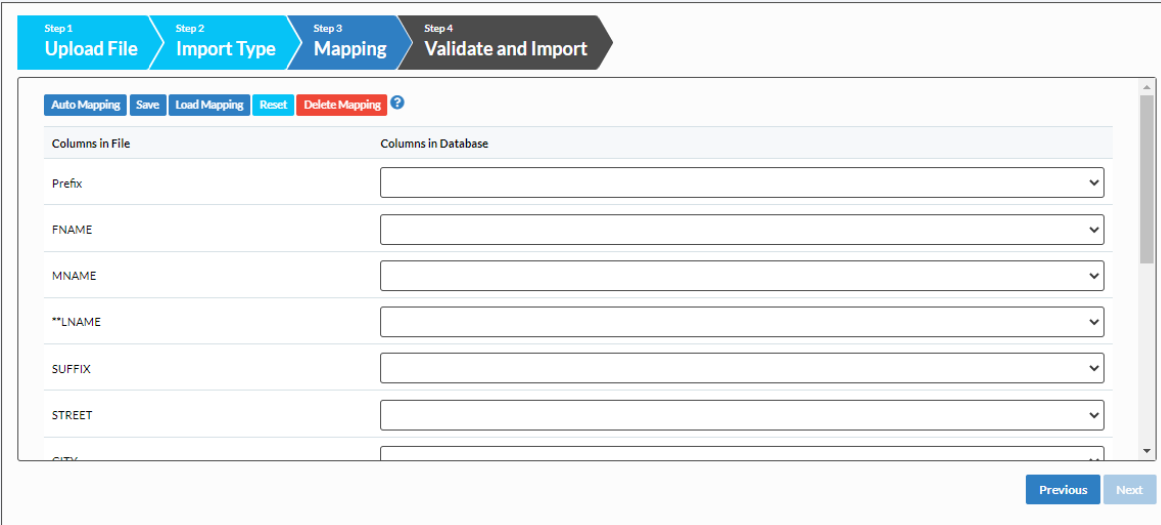
Formatting the File

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**
- Scan file for odd characters (such as quotes) and formatting discrepancies (such as different alignments in cells) that may cause problems with the load
- **Gift amount** for each record (format money fields with decimals, no commas or $ sign)
- **Fund Code** – Ex: P2018 for Primary 2018 (if identified in batch header, then not required in file)
- **Batch Number** – 4 alphanumeric characters (if identified in batch header, then not required in file)
- **Batch Date** – this date will pull on FEC reports (if identified in batch header, then not required in file)
- **Source Code** – fundraising code that allows for tracking where contributions come from
- **Payment Types:**
    - **CA = Cash**
    - **CH = Check**
    - **CC = Credit Card**
    - **CI = Credit Card – Internet**
    - **EF = Electronic Transfer**
    - **IK = In-Kind**
    - **OT = Other**
    - **AX = American Express**
    - **VM = Visa/MasterCard**
    - **DS = Discover**
    - **PP = PayPal**
    - **JF = Joint Fundraising Committee**
    - **EM = Earmark**
    - **PG = Pledge**
- **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**
    - **NOTE: Street** = Main address field, Address Line 1 and Address Line 2 = Additional Address information (Ste. #, Apt, #, Floor, PO Box, etc.)
    - Please see the **Mappable Import Fields** document below for more details.

Importing the File:

1. To import, click on the ⬆ icon in the **Dashboard Navigation Bar** either in the **People** or the **Fundraising Dashboard**.

2. In **Step 1: Upload File**, click within the white box to choose a file from your computer or click and drag the file into the white box. Then, select the worksheet to be used for import from the file and click **Next** or **Step 2: Import Type**.

3. In **Step 2: Import Type**, choose the import type of **New Gift.**
   o Select the **Fund Code** from the drop-down and enter the **Default Batch #** and **Default Batch Date** (which will only be used it they are not defined in your file). Enter the **# of Gifts** and **Total Amount** that is the file. Then, click **Next** or **Step 3: Mapping**.

4. In **Step 3: Mapping**, the fields in the first column are the headers from the 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 the file and Crimson. Make sure to map all of the required fields and then click **Next** or **Step 4: Validate and Import**.

   o Use **Auto Mapping** and Crimson will attempt to auto map the columns in the file to the columns in the database. If any fields are not auto mapped or are auto mapped incorrectly, you can manually update the mapped fields.

   o Save the mapping for future use by clicking **Save**. Choose **Save to Selected Mapping** (to select a previously saved mapping to overwrite) or **Save to New Mapping** (to create a brand new saved mapping). **Load Mapping** loads previously saved mapping and **Delete Mapping** deletes any saved mapping. Click **Reset** to wipe out all mapped fields and start over.

5. In **Step 4: Validate and Import**, click **Validate And Import**. This step validates that all required fields are included and that the file's format is correct.
    - If the import fails, a message will appear saying why the file was not validated and imported. Fix the listed errors, and then attempt the import again.
    - If successful, a confirmation message will appear confirming how many records were validated and imported. Another message will appear saying whether the import was successful with a preview of the output results.
    - Click **Output for Review** to see the import's results which you can save.