crimson

Loading Donations Received from WinRed

Step 1 – Enter the Conduit's Contribution

1. Create a people record for WinRed PAC if one does not already exist.

2. After this record is created, click **Add Gift**.

3. Create a gift with the Payment type of **WR-Win Red**. The amount should be the Gross Amount of the Transfer from WinRed PAC.

   o By selecting this payment type, this payment will automatically be marked as a memo with **FEC Memo Text** of "See Attributions below" and you will now see the "Earmark Attribution Import" tab on the gift record.

Step 2 – Enter the Earmarked Contributions

1. Under the conduit's money record, click the **Earmark Attribution Import**

2. Follow the normal importing steps 1 – 4

   o Step 1: Upload File

   o Step 2: Import Type

   o Step 3: Mapping

   o Step 4: Validate and Import
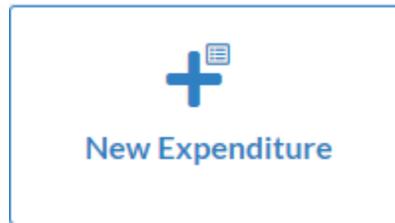

NOTE: Gifts loaded this way will link to the conduit record and automatically have the proper FEC memo text. They will also report at a 1:1 ratio, showing one WinRed memo for every Earmarked gift.

Step 3 – Enter the Processing Fees

1. Click the **New Expenditure** action button on the **Treasury Dashboard**.

2. Search for an existing **Payee** or click to add a new one to Crimson. The payee should be:

WinRed Technical Services LLC

1776 Wilson Blvd, Suite 530

Arlington, VA 22209

3. Once you have selected or created a new payee, the **New Disbursement** window will open.

4. Enter the new expenditure's information.

5. Click **Save** when done