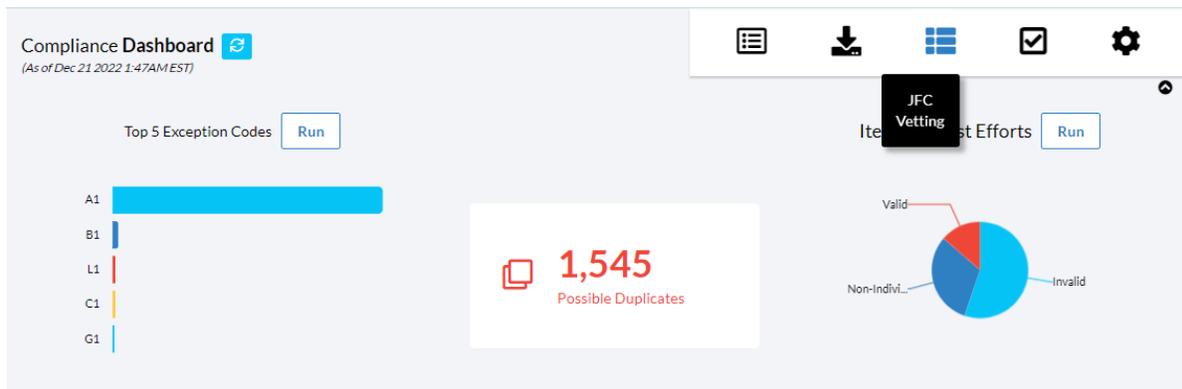


With more and more fundraising coming through joint fundraising committees, you may find an increasing amount of your time spent vetting JFC lists. Crimson provides a new tool designed to speed up the process by using our import matching logic to determine if a donor exists in your database and how much they have given to a specified fund code.

Accessing the JFC Vetting Tool

The JFC Vetting Tool can be found on the [Compliance Dashboard](#) at the top right corner of the page from the **Navigation Bar**.



1. 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**.
2. In **Step 2: Import Type**, select the **Fund Code** from the drop-down. If you select more than one fund code, it will combine the totals into one column, so it is recommended you do separate imports for Primary and General. You also need to select either CTD or YTD for a donation total option. Primary and General fund codes should select CTD while PAC or PARTY fund codes should use YTD.

JFC Vetting

Step 1 Upload File Step 2 Import Type Step 3 Mapping Step 4 Validate and Import

Choose a file or drag it here.

3. 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 the required fields and then click **Next** or **Step 4: Validate and Import**. Since you aren't importing any gift data, you do not need to map amount or date.

JFC Vetting

Step 1 Upload File Step 2 Import Type Step 3 Mapping Step 4 Validate and Import

Auto Mapping Save Load Mapping Reset Delete Mapping ?

Columns in File	Columns in Database
Last Name	<input type="text"/>
Gift Amount	<input type="text"/>
Fund Code	<input type="text"/>
Batch Number	<input type="text"/>
Batch Date	<input type="text"/>
Source Code	<input type="text"/>

- 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.
- 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.



4. 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 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.
- The output file will be identical to the file you imported with columns appended on the right that indicate the matched PID, the CTD or YTD total, and the date the load was run. For rows where PID is blank, this signifies no record was found in the database and a manual search should be done to confirm the donor doesn't exist.

	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
	OCCUPATION	STREET	ADDR1	CITY	STATE	ZIP	HMPHN	BSPHN	FAX	CELL	EMAIL	P2020	G2020	PID	CTD	_asOf
1	Business Executive	1233 Test St.		Test	CA	12354	5555555555	56723412341e011		3452341234	yahoo@yahoo.com	\$2,800.00	\$500.00	74157837	\$0.00	04/05/2019
2		1301 Collingwood Pl		Corydon	IN	47112	3106592181					\$2,800.00	\$500.00	74023732	\$0.00	04/05/2019
3	Finance	140 Albermarle Road		Marshfield	WI	54449	8551481622				email74024942@email.com	\$2,800.00	\$500.00	74024942	\$0.00	04/05/2019
4	Software developer	1593 Spring Hill Rd		Vienna	VA	22182	7031111111	7037706004	703.123.1234	7033011234	lsiu@cmdi.net	\$2,800.00	\$500.00	74492018	\$0.00	04/05/2019
5	Retired	2152 Evans Drive		Falls Church	VA	22202	7037706032	7033144666			fia_05@hotmail.com	\$2,800.00	\$500.00	74157789	\$0.00	04/05/2019
6	Retired	444 Test Street		Washington	DC	20016	7038694455				frankamaya@gmail.com	\$2,800.00	\$500.00	74178553	\$0.00	04/05/2019
7		467 Lee Highway		Falls Church	VA	22046						\$2,800.00	\$500.00	74022685	\$0.00	04/05/2019
8	Retired	9 Sagebrush Trl		Artesia	NM	68210					Xdanbanks@usa.net	\$2,800.00	\$500.00	74465685	\$0.00	04/05/2019
9																
10																
11																
12																
13																

NOTE: This tool is designed to supplement, not replace manual vetting of JFC donations. It uses our import matching logic and is dependent on your database being clean and deduped. If a donor exists in your database with different information than provided in the JFC file, we will not find a match and you may inadvertently accept an excessive donation. We recommend you still manually vet your lists, especially for records where no match is found.