


To import new payee or vendor records, click the  icon in the **Dashboard Navigation Bar** within the Treasury **Dashboard**.

### 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** or **Organization 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.
- **Entity Types:**
  - o **ANP = Additional National Party Accounts** (ie. RNC, NRSC, NRCC, etc.)
  - o **CAN = Candidate Committee**
  - o **COM = Committee**
  - o **IND = Individual**
  - o **NPO = National Party Organization**
  - o **ORG = Organization** (not a committee or a person)
  - o **PAC = Political Action Committee**
  - o **PTY = State/District/Local Party Organization**
- **NOTE: Street = Main address field**, Address Line 1 and Address Line 2 = Additional Address information (Ste. #, Apt, #, Floor, PO Box, etc.)

### Importing the File:

1. To import, click on the  icon in the **Dashboard Navigation Bar** in the **Treasury 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 Vendor** and 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 Crimson. 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 . 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  to see the import's results which you can save.