crimson

Mass Adjustment Tool

The Mass Adjustment Tool allows users to mass apply Full Refund Adjustments and Full Chargeback Adjustments. To use the Tool, click the ⬆ icon in the **Dashboard Navigation Bar** on the **Fundraising 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
- **Adjustment Date**
- **Gift Amount** for each record (format money fields with decimals, no commas or $ sign)
- **One of the Following required**
    o **MID -** Transaction Id of the gift record
    o **Credit Card Transaction Date**

Using Mass Adjustment Tool

- To import, navigate to the **Fundraising Dashboard** and then select **Mass Adjustment** from the **Dashboard Navigation Bar.**

- In **Step 1: Upload List of Transactions to Match,** click the ⬆ Choose a file or drag it here. 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.
- **Step 2 – 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

- o 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.
- o 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.

NOTE: Adjustment Date **and** Gift Amount are required. **At least one** of TXN ID or Credit Card Transaction ID must be applied/required.

- **Step 3 – Review –** Based on the information provided in your upload, Crimson will match the records in your excel to records in your database.

- o Records will be separated in tabs by those that are **Matched, Already Adjusted, and Not Matched.**

- o Click to export an excel of the selected tab directly to your computer.
- o Use the **Adjustment Type** dropdown to select the type of adjustment to be applied to matched records.

- **Step 4 Results**

- o Click to apply the selected Adjustment Type to the matched records.
- o You will see a confirmation of number of gifts adjusted, with the total Chargeback or Refund Amount.

| Matched (16 records) | Already Adjusted (0 records) | Not Matched (0 records) |

16 records adjusted with total amount of $498.15.

Export

STATUS	STATUSINFO	MID	Date	Amount	CCREFNO	ADJMID
PROCESSED		112	2020-08-05T00:00:00	5.15		4586
PROCESSED		3	2021-09-24T00:00:00	50		4587
PROCESSED		4	2021-04-09T00:00:00	15		4588
PROCESSED		5	2021-09-01T00:00:00	35		4589
PROCESSED		6	2021-09-30T00:00:00	35		4590
PROCESSED		7	2021-09-27T00:00:00	20		4591
PROCESSED		8	2021-07-09T00:00:00	30		4592
PROCESSED		9	2021-07-12T00:00:00	70		4583

Previous   Next

12/28/2022