

To import Pledges, you will follow a similar import process as you normally would for a **New Contacts** or **New Gifts** Import.

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
- **Pledge Amount:** Enter the amount of the pledge (format money fields with decimals, no commas or \$ sign). (Required)
- **Pledge Date:** The date of the pledge. (Required)
- **Expect Date:** Enter the date when the pledge is expected to be fulfilled in this field.
- **Fund Code:** Choose the fund code for the pledge. (Required)
- **Source Code:** Choose the source code for the pledge. (Required)
- **Club:** You can attribute a pledge to a specific existing club.
- **Comment:** Enter any additional information/note about the pledge in this field.

Importing



1. Click  in the People or Fundraising Navigation Bars to start the Import Process.
2. In **Step 2 – Import Type** select New Pledge.
 - Enter in the **No. of Pledges** and **Total Amount** that is in the file. The click **Next** or **Step 3: Mapping**.
 - If you would like the data in your import file to overwrite the data already existing for records in Crimson, check the **If data already existed Overwrite existing data?**
 - If you would like the data in Crimson to take precedence over any new data in your import file and only have the data be appended, do not check the checkbox **If data already existed Overwrite existing data?** Checkbox.

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 of the required fields and then click **Next** or **Step 4: Validate and Import**.

- 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 . 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.

A	B	C	D	E
PLEDGE DATE	EXPECT DATE	PLEDGE AMOUNT	FUND CODE	SOURCE CODE
01/17/2024	02/28/2024	\$1,000.00	P2024	CRIMSON

NOTE: To learn more about Pledges, see [Crimson: Pledges](#).