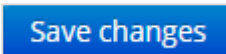
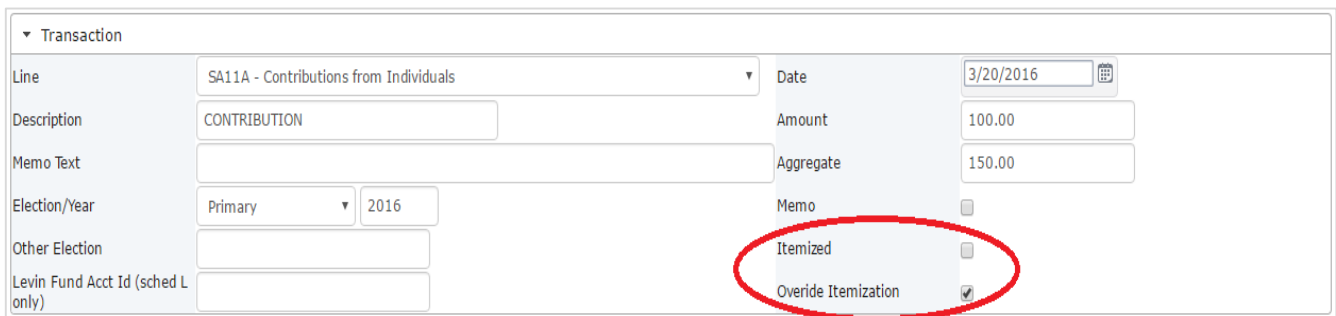


You can force transactions to be itemized or unitemized in CrimsonFiler even if the **Itemization** Settings for a particular FEC line number has been set to itemize transactions only when the aggregate is over \$200. This can be done manually for particular transactions or in mass via importing. For more information on Itemization Settings, please see the **Itemization Settings FAQ** on the HelpDesk.



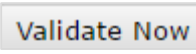

Manually Itemizing/Unitemizing Individual Transactions

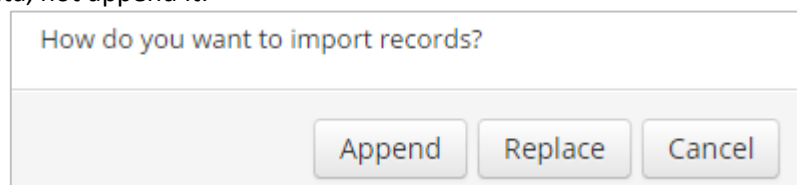
1. Find and open the transaction to be itemized/unitemized in the FEC report Schedules tab.
2. Under the **Transaction** section, you will see the “**Itemized**” and “**Override Itemization**” checkboxes.
3. First, check the “**Override Itemization**” checkbox.
4. Then, check the “**Itemized**” checkbox if you want to force this transaction to be itemized or uncheck the “**Itemized**” checkbox if you want to force it to be unitemized.
5. Press the  button to save the updates to the transaction.



Transaction			
Line	SA11A - Contributions from Individuals	Date	3/20/2016
Description	CONTRIBUTION	Amount	100.00
Memo Text		Aggregate	150.00
Election/Year	Primary 2016	Memo	<input type="checkbox"/>
Other Election		Itemized	<input type="checkbox"/>
Levin Fund Acct Id (sched L only)		Override Itemization	<input checked="" type="checkbox"/>

Mass Itemizing/Unitemizing Transactions in a Schedule via Import

1. Select the Schedule in the FEC report that you need to mass itemize/unitemize transactions for.
2. Press the  button, open the Excel file, and find the **ITEMIZED** and **OVERRIDE** fields.
3. For the records that you want to force itemize, you need those transactions to say “**True**” in the **ITEMIZED** and **OVERRIDE** fields. For the records that you want to force unitemize, you need those transactions to say “**False**” in the **ITEMIZED** field and “**True**” in the **OVERRIDE** field.
4. When done updating the **ITEMIZED** and **OVERRIDE** fields for all of the transactions, save the Excel file.
5. Go back into the Schedule you are editing itemization settings for, and press the  button.
6. In **Step 1: Upload File**, choose the file that you recently saved and select the correct worksheet.
7. In **Step 2: Map Fields**, all of the fields should be pre-mapped for you.
8. In **Step 3: Validate**, press the  button.
9. Once it’s been confirmed that the file has no errors, press the  button and choose to “**Replace**” the data, not append it.



How do you want to import records?

Append Replace Cancel