

The Events Module Import option allows you to import a list of invitees to an event.

### Prepping Your File:

Before you begin importing please save the file as an Excel. The following are the available fields for import:


<b>Columns to Include</b>	<b>Description</b>
<b>ID</b>	Use field if the record already exists in Crimson. This is suggested to avoid duplicate issues.
<b>Record Type</b>	Default Options Available: <ul style="list-style-type: none"> <li>• I = Individual</li> <li>• C = Candidate Campaign Committee</li> <li>• P = Multi-Candidate PAC</li> <li>• S = State or Local Party Committee</li> <li>• O = Non Multi-Candidate PAC</li> <li>• M = Non Federal Committee</li> <li>• N = National Party Committee</li> <li>• R = Partnership &amp; LLC</li> <li>• T= Other</li> <li>• J = Joint Fundraising Committee</li> <li>• D = Indian Tribe</li> </ul>
<b>Prefix, First Name, Middle Name, Last Name, &amp; Suffix</b>	Each of these fields should be parsed out into their own separate column.
<b>Employer &amp; Occupation</b>	Each of these fields should be parsed out into their own separate column
<b>Title</b>	This is the invitee's work title, different from "Occupation".
<b>Salutation, Informal Salutation, Mail Salutation</b>	These fields are defined by the clients, but be consistent with what each salutation is composed of.
<b>Mail Name</b>	Name used for mail.
<b>Primary Mail</b>	Use "True" or "False" depending on whether this record will be a primary mail record or not.
<b>Spouse Name</b>	This field can have first name for spouses with the same last name or first and last name when the last names are different.
<b>Address Type</b>	Only import one type at a time. Options: <ul style="list-style-type: none"> <li>H = Home</li> <li>B = Business</li> <li>S = Seasonal</li> <li>O = Other</li> </ul>

<b>Street, Address Line 1, Address Line 2, City, State, Zip, &amp; Plus 4</b>	Each of these fields should be parsed out into their own separate column.
<b>Bus.Street, Bus.Address Line 1, Bus.Address Line 2, Bus.City, Bus.State, Bus.Zip, &amp; Bus.Plus4</b>	Each of these fields should be parsed out into their own separate column.
<b>Home Phone, Business Phone, Fax, Cell Phone, Email, Second Email, &amp; URL</b>	Each of these fields should be parsed out into their own separate column.
<b>Assistant, Assistant Phone, &amp; Assistant Email</b>	Each of these fields should be parsed out into their own separate column.
<b>Date of Birth</b>	MM/DD/YYYY or MM/DD/YY format.
<b>Event Code</b>	The code (not description) for the Event.
<b>Event Status</b>	Default status options in Crimson are: Invited, Confirmed, Attended. <i>See below for more information on where to add/edit status options.</i>
<b>Attend Date</b>	Also known as the RSVP date
<b>Table #</b>	Use this field if using assigned table numbers for an event.
<b>Answer01-25</b>	Use this to answer the questions already created for an event. Can answer up to 25 questions for an event.
<b>Industry</b>	The industry of the invitee. Options: T = Telecommunication AG = Agriculture AL = Alcohol AU = Auto BE = Beverage BL = Building CH = Chemical CP = Computer CO = Construction DF = Defense EL = Electronic
<b>Flag 1-10</b>	Can select up to 10 Flags already in Crimson to assign to the imported invitees.
<b>Keyword 1-10</b>	Can select up to 10 Keywords to assign to the imported invitees.
<b>Contact Prefix, Contact First Name, Contact Middle Name, Contact Last Name, Contact Suffix, &amp; Contact Title</b>	Each of these fields should be parsed out into their own separate column.
<b>Contact Street, Contact Address Line 1, Contact Address Line 2, Contact City, Contact State, Contact Zip, &amp; Contact Plus 4</b>	Each of these fields should be parsed out into their own separate column.
<b>Contact Home Phone, Contact Business Phone, Contact Fax,</b>	Each of these fields should be parsed out into their own separate column.

Contact Cell Phone, & Contact Email

Contact Informal Salutation      Contact's informal salutation.

## Importing the Event List:

Navigate to the **Event Dashboard** on the left **Main Menu**. Click the **Import Invitees**  button on the top right **Dashboard Navigation Bar** and follow the import steps:

### Step 1: Upload File

Click the **Upload File** button and then select the file you saved to your computer for import. Choose the worksheet you want to import from the drop down list that appears. Click **Next**.

### Step 2: Import Type


Select **Event** from the **Import Type** drop-down menu and type the **Event Code** you are importing your invitees to. As you start to type, existing **Event Codes** will populate for you to select from or if the event does not

yet exist, click  to create it. You can also select whether or not to overwrite existing data. Click **Next**.

### Step 3: Mapping

The first column will display the column headers of your file. The second column will have drop-down menus with Crimson headers. Map the fields together by selecting the corresponding Crimson headers for your file. Click **Auto Mapping** for Crimson to auto map fields. If using this feature, be sure to check for fields Crimson did not auto map. For more information on **Auto Mapping**, see the [Crimson 3 – Automapping](#) guide on the HelpDesk. Click **Next**.

### Step 4: Validate and Import

Click  to scan your file for possible errors. It will display results if any occur or display a ready to import result. If there are no errors, it will automatically import, show you the results, and give you an option to **Output for Review**.

For more information about the newest Event features in Crimson, see the [Crimson 3 - New Events Features](#) guide on the HelpDesk. To create a new event or edit an existing event, see the [Crimson 3 – Creating a New Event](#) or [Crimson 3 – Editing Event Details](#) on the HelpDesk.