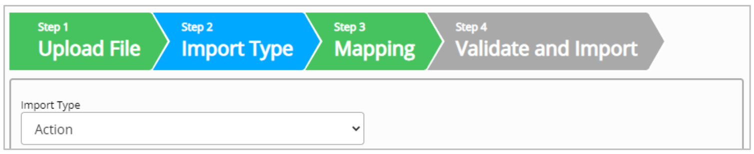
Importing Actions

When importing an Excel list of Actions, follow the same import process as you normally would for a new Contacts import:

Commented [RB1]: Joe can you update the above title, so that it matches our usual layout?

- Click  in the Navigation Bar in the **People** or **Fundraising** Dashboards.
- However, in **Step 2 – Import Type** select **Action**.



Before importing, make sure the following Action related columns to import **Action** information:

- **Action Name** – Put the Action name here, just the name not the Category.
  - NOTE: The Action must already be created in **People Settings** before importing.
- **Action Date** – This is for the Action's Date. This is required for import.
- **Action Source Code** – Source Code, not required.
- **Action Note** – Free text, not required.
- **Custom Fields** – You can import Custom Field information. The custom fields and the values do have to match options that are already in People Settings. For each custom field use the format below, adding a number for each additional custom field. First, add the Field name, second add the value (look up value, number, or date).
  - **Action Custom Field 1**
    - Example: Status
  - **Action Custom Field Value 1**
    - Example: Attended

T	U	V	W	X	Y
Action Name	**Action Date**	**Action Source Code**	**Action Note**	**Action Custom Field 1**	**Action Custom Field Value 1**
Set-up	9/15/2020	EV001	Set up for Event	Volunteer Hours	5
Phone Calls	9/4/2020			Sign-Up Date	9/3/2020
Meeting-Staff	9/10/2020		Even Planning	Hours	2

NOTE: To learn more information on creating new Actions, see Crimson 3: Actions.