

crimson³ Mass Adjustment Tool

The Mass Adjustment Tool allows users to mass apply Full Refund 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

Required Fields:

- **Adjustment Date** - This will affect the period in which the adjustments are reported.
- **Gift Amount** (Format money fields with decimals, no commas or \$ sign) - This amount must equal the amount of the gift in Crimson. If not, the gift will appear in “Not Matched” and a partial refund/chargeback will need to be manually entered.
- **One of the Following required**
 - o **MID** - Transaction Id of the gift record
 - o **Credit Card Transaction ID** - If you have the WinRed automated loads feature enabled, make sure to request the ID field with your payout files from WinRed to match this field. This field should start with rv_ccc or rv_ch and be unique to each record.

Using Mass Adjustment Tool

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



2. In **Step 1**, drag the file you want to import into the area or click to select your excel file from your computer.
3. Then, select the worksheet from the excel file that will be uploaded.
4. In **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

Mass Adjustment

Step 1 Upload File Step 2 Mapping Step 3 Review And Adjust

Auto Mapping Save Load Mapping Reset Delete Mapping ?

Columns in File	Columns in Database
MID	MID
ADJUSTMENT DATE	Adjustment Date
CC Transaction ID	Credit Card Transaction ID
AMOUNT	Gift Amount

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- You can also use the **Auto Mapping** option for Crimson to auto map fields for you but confirm all fields were mapped correctly afterwards and that all the required fields were mapped.
- 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 mapped and matched for the adjustment to be applied to the correct transaction.

- In **Step 3 – Review**, Crimson will match the records in your excel to records in your database based on the information provided in your upload. You will have three sets of results.

Mass Adjustment

Step 1 Upload File Step 2 Mapping Step 3 Review And Adjust

Matched (3328 records) Already Adjusted (3 records) Not Matched (0 records)

Adjustment Type: Full Refund Process Export

STATUS	STATUSINFO	PID	MatchType	FNAME	LNAME	MRCDate	CTD	STREET	ADDR1	ADDR2	CITY
MATCHED		74000000	MID	Marisa	ABC123	2020-09-16T00:00:00	2830	7704 Leesburg Pike			Des Moines
MATCHED		74000000	MID	Marisa	ABC123	2020-09-16T00:00:00	2830	7704 Leesburg Pike			Des Moines
MATCHED		74000008	MID	Rose	Evans	2020-09-16T00:00:00	4602	1593 Spring Hill Road			Vienna
MATCHED		74490573	MID	Lydia	Siu	2020-09-16T00:00:00	5215	1593 Spring Hill Rd Ste 400			Tyson's Corner
MATCHED		74000000	MID	Marisa	ABC123	2020-09-16T00:00:00	2830	7704 Leesburg Pike			Des Moines
MATCHED		74545027	MID	Rochell	Maier	2020-09-17T00:00:00	11.16	W12033 Slack Road			Lodi
MATCHED		74545027	MID	Rochell	Maier	2020-09-17T00:00:00	11.16	W12033 Slack Road			Lodi
MATCHED		74545028	MID	Reinaldo	Lopez	2020-09-17T00:00:00	47.8	3410 Nw 91 Wly			Hollywood
MATCHED		74545029	MID	Shivloachnie	Singh	2020-09-17T00:00:00	9.32	425 Sw 4Th Ave			Fort Lauderdale
MATCHED		74539999	MID	Carine	Silberstein	2020-09-17T00:00:00	11.51	252 Saddle River Rd			Monsey
MATCHED		74545030	MID	Patrick	Armstrong	2020-09-17T00:00:00	481.48	82 S Sewall'S Point Road			Stuart
MATCHED		74545030	MID	Patrick	Armstrong	2020-09-17T00:00:00	481.48	82 S Sewall'S Point Road			Stuart
MATCHED		74545031	MID	Gregory	Aimquist	2020-09-17T00:00:00	48.99	Po Box 522			Watford City

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- **Matched** – The first tab will present you with any confirmed matches.

- You will be asked if you want these treated as **Chargebacks** or **Refunds**.
 - Chargebacks are reported as negatives on Schedule A
 - Refunds only mark these gifts as refunded in Crimson. You need to enter these as refunds on Schedule B to balance the cash on the FEC report.
- After you have confirmed which adjustment type you want, click **Process** and the records will be adjusted.
 - **Already Adjusted** – Their maybe transactions that have already been processed for adjustments. You should review those to confirm no further actions is needed.
 - **Not Matched** – Not matched means either the CC TRAN ID/MID does not exist in Crimson or the Amount does not match. You should review those to confirm no further actions is needed.

Export

6. Click **Export** to export an excel of the selected tab directly to your computer.
7. To process the Matched records for adjustment, use the **Adjustment Type** dropdown to select the type of adjustment to be applied to matched records.

Adjustment Type

Full Refund

Full Refund

Full Chargeback

Process

STATUS STATUSINFO FID matchtype FNAME LNAME

Process

8. **Step 4**, click **Process** to apply the selected Adjustment Type to the matched records.
9. You will see a confirmation of total gifts adjusted, with the total Chargeback or Refund Amount.

Matched (9 records) Already Adjusted (1 records) Not Matched (0 records)

9 records adjusted with total amount of \$118.28. **Export**

STATUS	STATUSINFO	MID	Date	Amount	CCREFNO	ADJMID
PROCESSED		568082	2020-09-16T00:00:00	10		571422
PROCESSED		568083	2020-09-16T00:00:00	10		571423
PROCESSED		568084	2020-09-16T00:00:00	10		571424
PROCESSED		568085	2020-09-16T00:00:00	10		571425
PROCESSED		568087	2020-09-16T00:00:00	10		571426
PROCESSED		568089	2020-09-17T00:00:00	1.6		571427
PROCESSED		568090	2020-09-17T00:00:00	9.56		571428
PROCESSED		568091	2020-09-17T00:00:00	47.8		571429
PROCESSED		568092	2020-09-17T00:00:00	9.32		571430

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10. You can use the “Already Adjusted” and “Not Matched” tabs to review records that may need more attention.