Campaign Finance Reporter Technical Bulletin

Importing Contributions Received

A committee may find it helpful, and time-saving to import large amounts of information about new individuals and their contributions to the committee; from a large fundraiser, for example. One can import information regarding names, address, prior year contribution amounts, receipt amounts, receipt dates, employer info, etc. The software then automatically sets up each individual or business as an entity and records a corresponding receipt with each individual.

The files to import must be in comma delimited format, with a file extension of .CSV or .TXT. Each line in the file must have the correct amount of fields relevant to the criteria being imported. If there is no information to be entered for a specific field, just leave it blank by immediately following the comma before the field with another comma, thereby skipping to the next field. Further information on how to format the file for importing is detailed below.

1. In the top menu bar, select **File\Import Contributions Received**
2. Click the **Browse** button, and browse for the .CSV or .TXT file that you wish to import
3. Click the button labeled **Preview**
4. Review the records that will be imported in the window labeled **Import Receipts**
5. Scroll horizontally to the end of the table in the Import Receipts window to the field labeled **Valid**. This field validates the data and reads as 'True' if the record is valid and will be imported or 'False' if the record is not valid.

*If any of the records to be imported contain 'False' in the **Valid** field, click the **Clear** button, open the .csv file, and make the necessary corrections to that record before importing.*

6. When you are satisfied with the records to be imported, click the button labeled **Import**

The *Receipt Import* file must contain the following 19 fields, in the following order, each followed by a comma (except the last):

- Last name
- First name
- Middle initial
- Phone number
- Address: Line 1
- Address: Line 2
- City
- State
- Zip code
- Prior year's contribution amount (Entry cannot include dollar signs [$] or commas [,])
- Contribution amount from 2 years ago (Entry cannot include dollar signs [$] or commas [,])
- Date receipt was received: in the current year
- Date receipt was deposited
- Amount of receipt (Entry cannot include dollar signs [$] or commas [,])
- In-kind receipt indicator: If an in-kind receipt, enter TRUE

- In-kind description
- Self employed indicator: if no employer, enter TRUE
- Employer description: enter self employed description here as well, if applicable
- Project code: if a code is not applicable, enter 0
  (NOTE: Project code is implemented only in version 2.2 and higher of CFR.
  If you have version 2.1, omit this column on your spreadsheet or csv file.

Examples (Each record must be on one line in the import file and amounts cannot include dollar signs [$] or commas [,]):

Doe,Jon,,6515555555,658 Cedar St,,St Paul,MN,55155,50,0,6/10/2009,6/11/2009,100,,,,State of MN,0

Doe,Jane,M,6515555556,658 Cedar,Suite190,St Paul,MN,55155,0,0,1/1/2009,1/1/2009,200, TRUE,Old laptop,TRUE,Farmer,0