

Help Content: Import Contributions

The Import Contributions function allows you to import names and monetary contributions data into C-SMART from a comma-separated values (CSV) file. A CSV file can easily be created using Excel or a similar application by saving the file in a CSV format. For C-SMART to accept the file, it will need to fit certain criteria. See the [File Layout](#) and [Code List](#) below for the specifications. You can also see a sample spreadsheet and download a template CSV file [below](#). Once the CSV file is temporarily uploaded into C-SMART, you will need to review and process each name record and transaction individually. As with regular data entry, C-SMART will perform checks to ensure that the data meets compliance requirements, such as source restrictions and contribution limits.

FILE LAYOUT

- ✓ Fields **highlighted in yellow** are required. **Note:** Even though not every column needs to be populated with information, every column listed below must exist in the file.
- ✓ **Red text** denotes that the field has a specific format requirement.
- ✓ An asterisk (*) denotes that a code is required. Review the [Code List](#) below in order to meet the format requirements.
- ✓ Do not include column headers in the CSV file.
- ✓ The Source ID (column A/1) might be provided to you by the credit card processor. If not, any number can suffice.
- ✓ Your Candidate ID (column B/2) and Committee ID (column D/4) can be found in the Campaign Profile section of your [C-Access](#) account.

Column Letter/Number	Maximum Number of Characters	Description
A	1	Source ID
B	2	Candidate ID
C	3	Election Cycle
D	4	Committee ID
E	5	Date Contribution Received: (M/D/YY) or (MM/DD/YY)
F	6	Contribution Amount: (xxxx) or (xxx.xx)
G	7	Matchable Amount: (xxxx) or (xxx.xx)
H	8	Contribution Type *
I	9	Check Number
J	10	Runoff/Rerun Indicator: Y/N
K	11	Segregated Indicator: Y/N
L	12	2000 Contribution Notes
M	13	5 Intermediary Number
N	14	1 Intermediary Indicator: Y/N
O	15	6 Prefix Code *
P	16	15 First Name
Q	17	1 Middle Initial
R	18	30 Last Name or Entity Name
S	19	6 Suffix Code *
T	20	6 Name Code *
U	21	8 Building Number

V	22	32	Street Name
W	23	6	Apartment Number
X	24	1	Borough Code *
Y	25	25	City Name
Z	26	2	State Abbreviation
AA	27	5	ZIP Code
AB	28	4	ZIP Code Extension
AC	29	30	Contact
AD	30	15	Contact Phone (xxxxxxxxxx)
AE	31	5	Contact Phone Extension
AF	32	6	Phone Type Code *
AG	33	15	Contact Phone 2 (xxxxxxxxxx)
AH	34	5	Contact Phone 2 Extension
AI	35	6	Phone 2 Type Code *
AJ	36	15	Contact Phone 3 (xxxxxxxxxx)
AK	37	5	Contact Phone 3 Extension
AL	38	6	Phone 3 Type Code *
AM	39	30	Employer Name
AN	40	8	Employer Building Number
AO	41	32	Employer Street Name
AP	42	6	Employer Apartment Number
AQ	43	25	Employer City Name
AR	44	2	Employer State Abbreviation
AS	45	5	Employer ZIP Code
AT	46	4	Employer ZIP Code Extension
AU	47	30	Occupation
AV	48	6	Email Type Code *
AW	49	30	Email Address
AX	50	6	Email 2 Type Code *
AY	51	30	Email 2 Address
AZ	52	6	Email 3 Type Code *
BA	53	30	Email 3 Address
BB	54	4000	Name Screen Notes
BC	55	30	Formal Prefix
BD	56	1	Resident Indicator: Y/N
BE	57	6	Doing Business Indicator: Yes/No

CODE LIST

- ✓ Use the following codes for the fields in the File Layout table marked with an asterisk (*).
- ✓ Codes must be entered in capital letters.

Contribution Type (Column H/8) Codes	
Description	Code
Cash	1
Check	2
Other	3
Credit Card	4
Money Order	5
Text	6

Prefix (Column O/15) Codes	
Description	Code
Dr.	DR
Ms.	MS
Mr.	MR
Mrs.	MRS
Miss.	MISS

Suffix (Column S/19) Codes	
Description	Code
II	II
III	III
Jr.	JR
Sr.	SR

Name (Column T/20) Codes	
Description	Code
Candidate	CAN
Corporation	CORP
Employee Organization	EMPO
Family	FAM
Individual	IND
Limited Liability Company	LLC
Other	OTHR
Partnership	PART
Candidate Committee	PCOMC
Political Action Committee	PCOMP
Political Party Committee	PCOMZ
Spouse	SPO

Borough (Column X/24) Codes	
Description	Code
Brooklyn	K
Manhattan	M
Queens	Q
Staten Island	S
Bronx	X
Out of City	Z

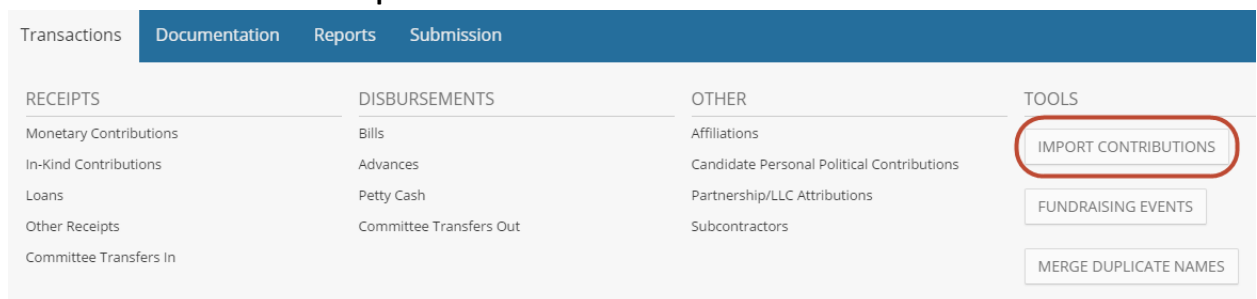
Phone Type (Columns AF/32, AI/35, & AL/38) Codes	
Description	Code
Business	BIZ
Cellular	CELL
Home	HOME
Other	ZOTHER

Email Type (Columns AV/48, AX/50, & AZ/52) Codes	
Description	Code
Business	BIZ
Personal	PERS
Other	ZOTHER

HOW TO IMPORT CONTRIBUTIONS

1. Go to Import Contributions.

Click **Transactions** and then **Import Contributions**.



2. Select the file and click Upload.

You are now on the **Import Contributions Data** screen. Make sure your data is saved in CSV format, meets the [file layout criteria](#), and is in an accessible location. Then, click **Browse** to select the file. Once the file is selected, click **Upload**.

Import Contributions Data ⓘ

Step 1: Select File

Select CSV File Browse Upload

Only .CSV (comma separated text) files can be imported.

Import Data Show 10 entries

Record	Name	Received Date	Amount	Matching Amount	Transaction ID	Imported
No data available in table						
						Total Imported Amount: \$0.00
Showing 0 to 0 of 0 entries						
						Previous Next

3. Import, review, and save.

After you click upload, C-SMART will load a list of all of the transactions you are trying to import. Starting with the first record and proceeding from there, click **Import** to review the name record and the transactions details and to save the transaction. You will need to do this for each contribution you wish to import.

CANDIDATE SERVICES TIP(S):

- ✓ *If you wish to import just the name information of the record, select the Import Names Only option.*
- ✓ *Review the name and transaction data carefully to ensure that it is accurate. Any necessary modifications should be made at this time.*
- ✓ *Make note of all Transaction IDs corresponding to the imported contributions and write them on backup documentation as you would with regular data entry.*

Import Contributions Data ⓘ

Step 2: Import Contribution

Select CSV File Browse Upload Import Names Only File Name: CY2016 Help Content - Import Contributions - CSV

Template.csv Import List

Only .CSV (comma separated text) files can be imported.

Import Data Show 10 entries

Record	Name	Received Date	Amount	Matching Amount	Transaction ID	Imported
Import	1	Rosario, Sophia	07/15/2016	\$100.00	\$100.00	
Import	2	Smith, Mary A	08/29/2016	\$2750.00	\$175.00	
Import	3	Jones, Dan	09/2/2016	\$50.00	\$0.00	
Import	4	Smith, Roger L	09/9/2016	\$500.00	\$175.00	
Import	5	Baker, Shirley	09/28/2016	\$350.00	\$175.00	
Import	6	Johnson, Mike	10/4/2016	\$250.00	\$0.00	
Import	7	Bruno, Peter	10/5/2016	\$10.00	\$10.00	
Import	8	Leisler, Jessica	10/10/2016	\$175.00	\$175.00	
Import	9	Wong, Barbara S	10/29/2016	\$75.50	\$75.00	
Import	10	Sumpter, Larry	11/8/2016	\$20.00	\$20.00	
						Total Imported Amount: \$0.00
Showing 1 to 10 of 12 entries						
						Previous 1 2 Next

SAMPLE CSV FILE

Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	
1	1	1389	2017	L	7/15/2016	100	100	1		N	N	Opening bank balance			MS	Sophia	Rosario			CAN	41-45	Hampton Street	4C	Q	Queens	NY	11373	
2	1	1389	2017	L	8/29/2016	2750	175	2	125	N	N					Mary	A	Smith		IND	886	Gates Avenue	11	K	Brooklyn	NY	11221	
3	1	1389	2017	L	9/2/2016	50	0	4		N	N				MR	Dan	Jones		JR	IND	34	W 87th Street		M	Manhattan	NY	10024	
4	1	1389	2017	L	9/9/2016	500	175	5		Y	N			3	Y	Roger	L	Smith		IND	2143	Wallace Avenue		X	Bronx	NY	10462	
5	1	1389	2017	L	9/28/2016	350	175	4		N	N					Shirley		Baker		IND	35-41	80th Street		Q	Queens	NY	11372	
6	1	1389	2017	L	10/4/2016	250	0	4		N	N					Mike		Johnson		SR	IND	1026	N 7th Street		Z	Out of City	NY	11040
7	1	1389	2017	L	10/5/2016	10	10	4		N	N					Peter		Bruno		II	IND	66	Avenue A	21C	M	Manhattan	NY	10008
8	1	1389	2017	L	10/10/2016	175	175	2	300	N	N	Follow up; wants to contribute again				Jessica		Leisler		IND	146	Astoria Boulevard		Q	Queens	NY	11368	
9	1	1389	2017	L	10/29/2016	75.5	75	1		N	N			4	Y	DR	Barbara	S	Wong		IND	100	Water Street		M	Manhattan	NY	10006
10	1	1389	2017	L	11/8/2016	20	20	5		N	N					Larry		Sumpter		III	IND	36-12	31st Avenue	2B	Q	Queens	NY	11106
11	1	1389	2017	L	11/25/2016	2000	0	2	487	N	N							United Baristas Local 1246		EMPO	100-130	Nome Avenue		S	Staten Island	NY	10314	
12	1	1389	2017	L	1/11/2017	1750	0	4		N	Y				MRS	Sarah	Matthews		IND	133-14	Sanford Avenue		Q	Queens	NY	11314		

Notepad

```
File Edit Format View Help
1,1389,2017,L,7/15/2016,100,100,1,,N,N,Opening bank balance,,MS,Sophia,,Rosario,,CAN,41-45,Hampton
1,1389,2017,L,8/29/2016,2750,175,2,125,N,N,,,,,Mary,A,Smith,,IND,886,Gates Avenue,11,K,Brooklyn,NY,
1,1389,2017,L,9/2/2016,50,0,4,,N,N,,,,,MR,Dan,,Jones,JR,IND,34,W 87th Street,,M,Manhattan,NY,10024,,
1,1389,2017,L,9/9/2016,500,175,5,,Y,N,,3,Y,,Roger,L,Smith,,IND,2143,Wallace Avenue,,X,Bronx,NY,10462,
1,1389,2017,L,9/28/2016,350,175,4,,N,N,,,,,Shirley,,Baker,,IND,35-41,80th Street,,Q,Queens,NY,11372
1,1389,2017,L,10/4/2016,250,0,4,,N,N,,,,,Mike,,Johnson,SR,IND,1026,N 7th Street,,Z,Out of City,NY,11040
1,1389,2017,L,10/5/2016,10,10,4,,N,N,,,,,Peter,,Bruno,II,IND,66,Avenue A,21C,M,Manhattan,NY,10008,,
1,1389,2017,L,10/10/2016,175,175,2,300,N,N,Follow up; wants to contribute again,,,,,Jessica,Leisler
1,1389,2017,L,10/29/2016,75.5,75,1,,N,N,,4,Y,DR,Barbara,S,Wong,,IND,100,Water Street,,M,Manhattan,N
1,1389,2017,L,11/8/2016,20,20,5,,N,N,,,,,Larry,,Sumpter,III,IND,36-12,31st Avenue,2B,Q,Queens,NY,11106
1,1389,2017,L,11/25/2016,2000,0,2,487,N,N,,,,,United Baristas Local 1246,,EMPO,100-130,Nome Avenue
1,1389,2017,L,1/11/2017,1750,0,4,,N,Y,,,,,MRS,Sarah,,Matthews,,IND,133-14,Sanford Avenue,,Q,Queens,N
```

TEMPLATE CSV FILE

[Available for download](#) is a template CSV file that you can use when preparing your file for import.

- ✓ Please review the required [File Layout](#) and [Code List](#) above before using the template CSV file.
- ✓ Be sure to delete all of the headers (row 1) before attempting to import the CSV file.
- ✓ Columns with headers in capital letters are required. **Note:** Even though not every column needs to be populated with information, every column listed in the required File Layout must exist in the file.
- ✓ An asterisk (*) denotes that a code is required. Review the [Code List](#) above in order to meet the format requirements.