Campaign Finance Reporter Technical Bulletin

Importing Entities

A committee may find it helpful, and time-saving to import large amounts of information about new individuals. One can import information regarding names, address, prior year contribution amounts, etc. The software then automatically sets up each individual or business as an entity.

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 Entities**
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**
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 12 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
- Contribution amount from 2 years ago
- Entity Type: "Ind" for Individual or "Other"

Examples (each entity must be on one line in the import file):

Doe,Jon,,6515555555,658 Cedar St,,St Paul,MN,55155,50,0,Ind

Kinkos,,M,6515555556,658 Cedar,Suite190,St Paul,MN,55155,0,0,Other