C-SMART HELP

IMPORT CONTRIBUTIONS

C-SMART allows you to import contributor information if it is formatted as a comma-separated values (CSV) file, which can be created in Excel by saving your workbook as a CSV file.

This guide will show you how to prepare your spreadsheet so that it can be uploaded into C-SMART. See the File Layout and Code List below for the specifications. You can also view a sample spreadsheet and download a template CSV file below.

Once the CSV file is 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 contributions meet compliance requirements such as source restrictions and contribution limits.

FILE LAYOUT

➢ Fields highlighted in yellow are required.

➢ Red text indicates that the field has a specific format requirement.

➢ An asterisk (*) indicates that a code is required. Review the **Code List** below in order to meet the format requirements.

➢ 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.

Important: Do not include column headers in the CSV file.

COLUMN LETTER/NUMBER		MAXIMUM NUMBER OF CHARACTERS	DESCRIPTION
A	1	4	Source ID
B	2	4	Candidate ID
C	3	5	Election Cycle
D	4	1	Committee ID
E	5	10	Date Contribution Received: (M/D/YY) or (MM/DD/YY)

COLUMN LETTER/NUMBER		MAXIMUM NUMBER OF CHARACTERS	DESCRIPTION
F	6	11	Contribution Amount: (xxxx) or (xxx.xx)
G	7	11	Matchable Amount: (xxxx) or (xxx.xx)
H	8	1	Contribution Type *
I	9	15	Check Number
J	10	1	Runoff/Rerun Indicator: Y/N
K	11	1	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

COLUMN LETTER/NUMBER		MAXIMUM NUMBER OF CHARACTERS	DESCRIPTION
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

COLUMN LETTER/NUMBER		MAXIMUM NUMBER OF CHARACTERS	DESCRIPTION
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.

PHONE TYPE (COLUMNS AF/32, AI/35, & AL/38) CODES	
DESCRIPTION	DESCRIPTION
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

CONTRIBUTION TYPE (COLUMN H/8) CODES	
DESCRIPTION	CODE
Cash	1
Check	2
Other	3
Credit Card	4
Money Order	5
Text	6

SUFFIX (COLUMN S/19) CODES	
DESCRIPTION	CODE
II	II
III	III
Jr.	JR
Sr.	SR

BOROUGH (COLUMN X/24) CODES	
DESCRIPTION	CODE
Brooklyn	K
Manhattan	M
Queens	Q
Staten Island	S
Bronx	X
Out of City	Z

PREFIX (COLUMN O/15) CODES	
DESCRIPTION	CODE
Dr.	DR
Ms.	MS
Mr.	MR
Mrs.	MRS
Miss.	MISS

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

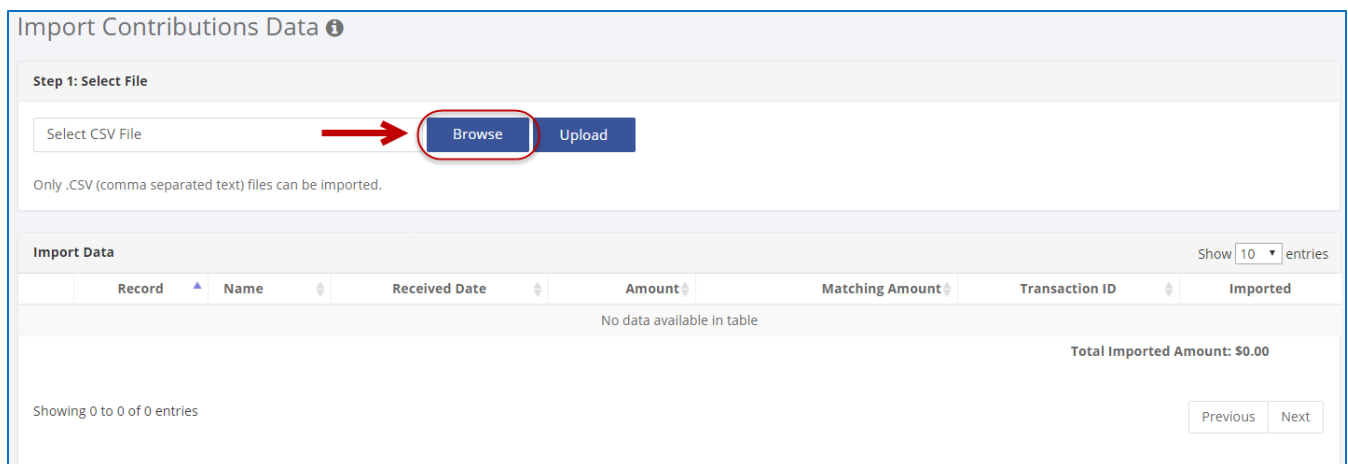## HOW TO IMPORT CONTRIBUTIONS

1. Go to **Import Contributions**.

   ➢ Hover your cursor over **Transactions** and click **Import Contributions**.

2. On the **Import Contributions Data** page, click **Browse** to select the file and then **Upload**.

3. Import the file, review the information, and click **Save**.

   ➢ C-SMART will generate a list of all of transactions contained in the spreadsheet. You must review the the name and the transactions details for each to proceed.

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

Best practices:

◆ Any necessary changes should be made now, so carefully review all data and make sure it is correct. Note the Transaction ID for each contribution and write it on the backup documentation as you would with regular data entry.

◆ To import just the name information, select Import Names Only.

Important:

◆ Make sure the data is saved in CSV format and meets the file layout criteria.

SAMPLE CSV FILES

➢ **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	13314

➢ **Notepad**

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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,1046
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,1
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,11
1,1389,2017,L,11/25/2016,2000,0,2,487,N,N,,,,,,,United Baristas Local 1246,,EMPO,100-130,Nome Avenu
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

➢ Use our template CSV file as a reference.

➢ Review the required **File Layout** and **Code List** above before using the template CSV file.

➢ Delete all of the headers (row 1) before attempting to import the CSV file.

➢ Columns with headers in capital letters are required.

➢ An asterisk (*) indicates that a code is required. Review the **Code List** above in order to meet the format requirements.

Important: Even though not every column needs to be populated with information, every column listed in the required File Layout must exist in the file.