

Campaign Finance Reporter Technical Bulletin

Importing Expenditures

A committee may find it helpful, and time-saving to import large amounts of information about committee expenditures. One can import information regarding names, address, expenditure amounts, etc. The software then automatically sets up each individual or business as an entity and records a corresponding expenditure 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 Expenditures**
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 **Expenditure Import**
5. Scroll horizontally to the end of the table in the Expenditure Import window to the field labeled **Valid Record**. 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 *Expenditure Import* file must contain the following 41 fields, in the following order, each followed by a comma (except the last). The first row of the file will be considered a header, **do not enter data in the first row**; enter the field names below or your own title for each field:

- Date
- Amount (Entry cannot include dollar signs [\$] or commas [,])
- Description
- Payee's Registration Number (if applicable)
- Payee's last name
- Payee's first name
- Payee's middle initial
- Payee's address (line 1)
- Payee's address (line 2)
- Payee's city
- Payee's state
- Payee's zip code
- Payee's phone number
- Is the payee a financial institution? (Y or N)

- Check number
- If not relevant, anything beyond this line can be left blank, though the field must still exist (by comma separation)
- Is this expenditure a contribution to another committee? (Y or N)
 - Is this an Approved Expenditure? (Y or N)
 - Is the Approved Expenditure approved by the benefiting committee's treasurer? (Y or N)
 - Is this an Independent Expenditure? (Y or N)
 - Is the Independent Expenditure for a candidate? (Y, or N if its against a candidate)
 - Candidate's registration number (for an Independent or Approved Expenditure)
 - Is this a Ballot Question expenditure? (Y or N)
 - Ballot Question description
 - Is this a Reimbursing Expenditure? (Y or N)
 - Reimbursing Expenditure description/original Vendor name and address
 - Is this an Unpaid Bill? (Y or N)
 - User Project number
 - 3rd Party Payee registration number
 - 3rd Party Payee last name
 - 3rd Party Payee first name
 - 3rd Party Payee middle initial
 - 3rd Party Payee address 1
 - 3rd Party Payee address 2
 - 3rd Party Payee city
 - 3rd Party Payee state
 - 3rd Party Payee zip code
 - 3rd Party Payee phone number
 - Is the 3rd Party a financial institution? (Y or N)
 - Is the expenditure a payment on a loan? (Y or N)
 - Is the expenditure a loan to another entity? (Y or N)
 - If this is a Ballot Question expenditure, Is this expenditure for the ballot question? (Y or N if its against the Ballot Question)

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

Cash Expenditure

6/1/2010,8824,Cash Expenditure,,Vendor Name,,,Commercial Invoice,P O Box
59228,Minneapolis,MN,55459-0228,651-282-6893,N,72380,,,,,,,,,,,,,,,,,,,,,

Cash Contribution to Another Registered Committee

6/1/2010,20.52,Contribution to Registered Committee,,Education Minnesota,30558,,41
Sherburne Ave,,St Paul,MN,55103,9524857662,N,72381,Y,,,,,,,,,,,,,,,,,,,,,

Ballot Question Cash Expenditure

6/1/2012,8824,Ballot Question Cash Expenditure,,Vendor Name,,,Commercial Invoice,P O Box
59228,Minneapolis,MN,55459-0228,651-282-6893,N,72380,,,,,,Y,Ballot Question
Description,,,,,,,,,,,,,Y