

CTB Export/Import Option - Florida

For Importing Contribution Records

Destination File - This is the Campaign ToolBox database file that is to receive the imported records. This is typically the file shown on the Opening Form when Campaign ToolBox is opened.

Source File - This is the tab-delimited text file that contains records that are to be imported into Campaign ToolBox. It is important that the Source File be in exactly the format described on the attached spreadsheet - any other format will result in errors and/or corrupted data.

Creating the Source File

There are two basic methods of creating the Source File.

Campaign ToolBox - The most accurate and reliable method is to use Campaign ToolBox to create the file. A typical arrangement would be for one or more people to use Campaign ToolBox to enter contribution records, then create export files (Source File) of those records. Those files are then given to the campaign Treasurer who uses the Importer to import the records into his Campaign ToolBox database. The Treasurer is the only one who actually creates Statutory Reports with Campaign ToolBox.

To create the file from records in Campaign ToolBox, click on Activities > Create Export File for CTB. Enter the starting and ending dates for the records you want to export. All records between and including those dates will be exported. Click the Export button. You will be prompted for the file name and location. The default file name includes the start and end dates of your exported records. If there is more than one person creating Source files, you might want to add your initials to the end of the file name.

Spreadsheet Export - The second method is to create the file yourself using Microsoft Excel or other spreadsheet program. The file structure is a tab-delimited as produced by Microsoft Excel as follows:

1. Use Microsoft Excel to create a spreadsheet exactly as described in the File Format section at the end of this document.
2. Click the menu item "File"
3. Select "Save as"
4. In the "Save as type" drop-down list, select "Text (Tab delimited) (*.txt)" and save the file.

Make sure that the file contains only records. There should NOT be any totals at the end of the file or any blank lines or anything other than the Header plus the records.

Campaign ToolBox will remember the last-used path and file name for both the Source and the Destination files. If the files no longer exist, the file fields will be empty and you will need to select the file(s) you want to use.

Duplicate Record Checking - Before any records are imported, the program looks at the last record in the source file and then searches the Destination File for a record with the same first name, last name, and date. If a match is found, a message is displayed with the name and date and a warning that a duplicate was found. You must then either click on Yes to continue, or No to cancel the operation.

Importation Defaults - The program will insert the following values into each record:

Contribution Source “_N/A”
Demographic Source “IMPORT”
Contrib. Comment “Imported record - [date and time stamp]”

NOTES

- Always have a current backup of your database file - especially before importing a large quantity of records.
- The Source file must be EXACTLY as described in the Importer File Specs document (files created by Campaign ToolBox meet the specs). If you have extra blank lines at the end of the file, CTB Importer will try to treat them as records and will display an error. In that case, you should open the Source file using Windows Notepad, set Word Wrap to OFF (click on the “Format” menu item, and uncheck “Word Wrap”), and delete any extra lines or other problems.

Program Limitations - The following limitations are inherent in the attempt to link transactions with existing demographic records using the specified import data. The software user must understand and accept this risk and limitation.

Item 1

The Software will attempt to check for an existing demographic record to attach a transaction to by using the following criteria:

First Name = exact match
Last Name = exact match
Suffix = exact match
Address = first 3 characters match

In nearly all cases, this will result in linking the new transaction with the correct existing demographic record. There are, however, potential cases where there may be incorrect linking. A potential incorrect linking might be "John Doe, Sr." and "John Doe, Jr." living at the same address where no suffix is given for either one; there would be a 50% chance that the

program would find the incorrect demographic record and link the transaction to that record.

Item 2

If the Source file contains more than one contribution record from the same person, and that person is not already in the Destination file, those records will be imported as different people. To avoid this, the Source file (while in Excel format or within Campaign ToolBox) should be checked for duplicate names before importing. You will need to establish your own internal controls to assure that records are accurately imported.

1	2	3	4	5	6	7	8
EntityType	Organization	LastName	FirstName	MiddleName	Suffix	AddressMajor	AddressMinor
I, B, C, P, S, O	Text	Text	Text	Text	Text	Text	Text
I		Washington	George	A.	Jr.	123 Mt. Vernon Rd	Suite 201
R	O	O	O	O	O	R	O
1	70	30	20	10	10	30	30

ROW 1 = Field Number

ROW 2 = Field Description

ROW 3 = Data Format

ROW 4 = Sample Data

ROW 5 = Required/Optional for Importer to work. Some "Optional" fields are REQUIRED for reporting purposes.

ROW 6 = Maximum field size (in number of characters). Anything beyond that will be truncated.

The first row of the file must be a Header row. No other rows may be used for anything other than records (i.e., no notes or totals)

Rev. 03/31/2008

9	10	11	12	13	14	15	16	17
City	State	ZipCode	Occupation	TypeOfContrib	InKindDescription	Date	Amount	SpecialElect
Text	Text	00000-0000	Text	CHE, CAS, INK, IN	Text	MM/DD/YYYY	0.00	0 - 11
Jacksonvill FL		12345-6789	Retired	INK	Yard sign material	12/25/2005	250.00	0
R	R	R	O	R	O	R	R	R
30	2	10	30	3	30	01/10/1900		2