Bulk Upload Tool Instructions

1. Using the program's template, or a spreadsheet based on it, create a spreadsheet of contributions that have not yet been reported. You can find the template in two places:
    a. OpenElectionsPortland.org/contributions: click bulk add, click template in the pop up box
    b. Portland.gov/SmallDonorElections/small-donor-elections-code-rules-and-program-forms

2. Make sure addresses are written in alignment with how the Voter Registration List records them.

Quadrants are abbreviated

Do	Don't Do
NW	~~Northwest~~
NE	~~Northeast~~
SW	~~Southwest~~
SE	~~Southeast~~
N	~~North~~
S	~~South~~

Streets are abbreviated

Do	Don't Do
St	~~Street~~
Ave	~~Avenue~~
Blvd	~~Boulevard~~
Dr	~~Drive~~
Ct	~~Court~~
Ln	~~Lane~~

Legal Names are used

Do	Don't Do
Alberto	~~Beto~~
James	~~Jim~~
Christina	~~Chrissy~~

Using written out quadrant information or street names, or using nicknames, reduces the odds that matchable contributors will get validated as matchable. Sometimes a nickname is the only name you have to report, but this can be minimized this by asking for "Legal Name" on remit forms and on online credit card fields.

3. Make sure the following categories are expressed using the correct terminology and capitalization. The template found here uses a drop down menu with only the correct terms and formatting.
    - Contributor Type: individual, business, family, labor, political_committee, political_party, unregistered, other
    - SubType: cash, inkind_contribution, inkind_paid_supervision, inkind_forgiven_account, inkind_forgiven_personal, item_sold_fair_market, item_returned_check, item_misc, item_refund
    - InKindType: wages, broadcast_advertising, fundraising_event_expenses, general_operating_expenses, printing, management, print_advertising, other_advertising, petition_circulators, postage, preparation_of_advertising, surveys_and_polls, travel_expenses, utilities
    - ContributorType: individual, business, family, labor, political_committee, political_party, unregistered, other
    - OAEType: seed, matchable, public_matching_contribution, qualifying, allowable, inkind, other
    - PhoneType: Mobile, Work, Home
    - Occupation: employed, self-employed, not-employed, foreign_employment, other
    - PaymentMethod: cash, check, money_order, credit_card_online, credit_card_paper, electronic_funds_transfer, debit

4. Make sure dates - in Date and Occupation Letter Date fields - are in YYYY/MM/DD format.

5. Save as CSV file.

6. On OpenElectionsPortland.org/contributions, click Bulk Add button.

7. Click Choose File.

8. Click Import.

9. Select the spreadsheet to import. If there are errors, it will list them. Fix the errors in the spreadsheet and try again.

10. Open each contribution and click "submit." They are not reported until they have been submitted.