

Bulk Upload Tool Steps

1. Download a spreadsheet of contributions that have not yet been reported.
2. Rearrange the spreadsheet to reflect order of template (found on OEP.org/contributions, click bulk add, find the linked template in the pop up box)
3. Copy/paste the contents without formatting into a new file (and then change the date formatting back to date).
4. Copy first row of template onto first row of new file and double check that the content of the columns are aligned with the template.
5. Change contents of Type, SubType (e.g. “cash” not “Cash Contribution,” and “seed” not “Seed Money”), InKindType, ContributorType, OAEType, and PaymentMethod (e.g. “credit_card_online” not “Credit Card – online”) to match options. (The system will tell you what they are if you submit it and they don’t match, but we’ll add a list to this draft document soon.)
6. Save as CSV file.
7. On OEP.org/contributions, click Bulk Add button
8. Click Choose File.
9. Click Import.

If there are errors, it will list them. Fix the errors and try again.

Inputs for Step #5:

- 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
- Date: YYYY/MM/DD
- OccupationLetterDate: YYYY/MM/DD