

Author: Kristenson, Joel
Last Updated: 2016-01-27

Overview

This article will walk you through the steps to import **expenditures** into your campaign database. This used to require that our support staff ran the import for political customers internally but the program was upgraded at the end of 2016 to allow end-users to import their own expenditures. This KB provides an example spreadsheet showing how to structure your data, the steps involved, the required fields for the import to work, and some best practices along the way.

 **Tip:** Interested in learning all about **importing**? Watch this [video playlist](#), and read [these articles](#) to get up to speed.

Steps for Prepping your File

Download this **spreadsheet** template to use as an *example* when preparing your expenditure data for import:

<http://www.trailblz.com/kb/images/kb0355/expenditure-import.xlsx>

Format your **expenditure data** so it's consistent with the example. My finished example is also available for [download here](#).

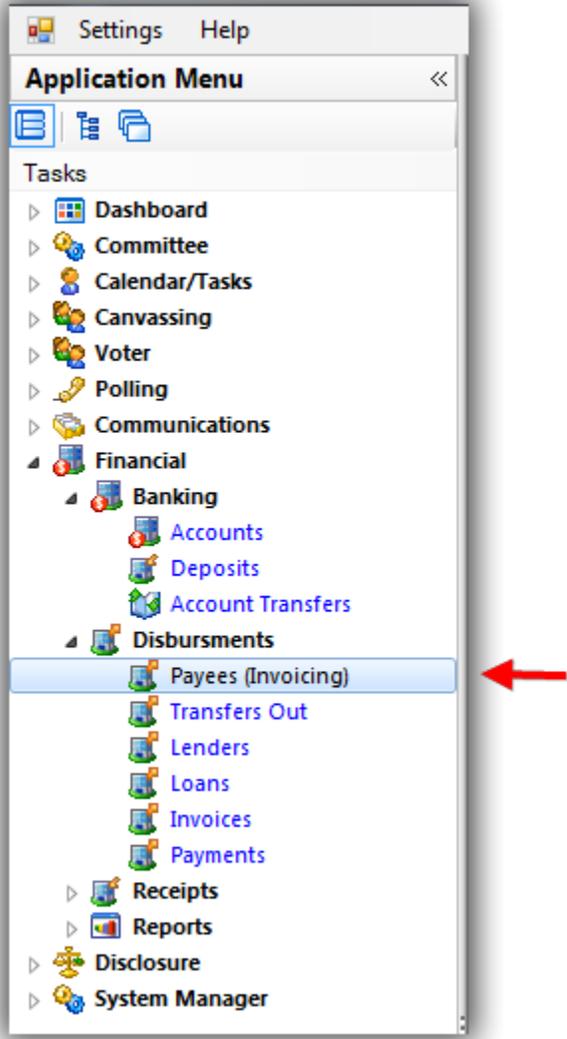
You can **email** that spreadsheet to support@trailblz.com if you need a confirmation that the data is mapped properly, or call us at 1-866-909-8700.

Once the file is prepped you'll need to **save** it as a **.csv** and **close** the file. Store it at a location on the machine that's easy to remember (ex: Temp folder).

Steps to Run the Import

- 1) Start a **new session** of **Trail Blazer** so that if the import gets botched it's easier to [roll-it-back](#).
- 2) Navigate to **Financial > Disbursements > Payees (Invoicing)**.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)



Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

3) Your current list of **payees** will populate automatically. Select **File > Import** from the tool strip at the top.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

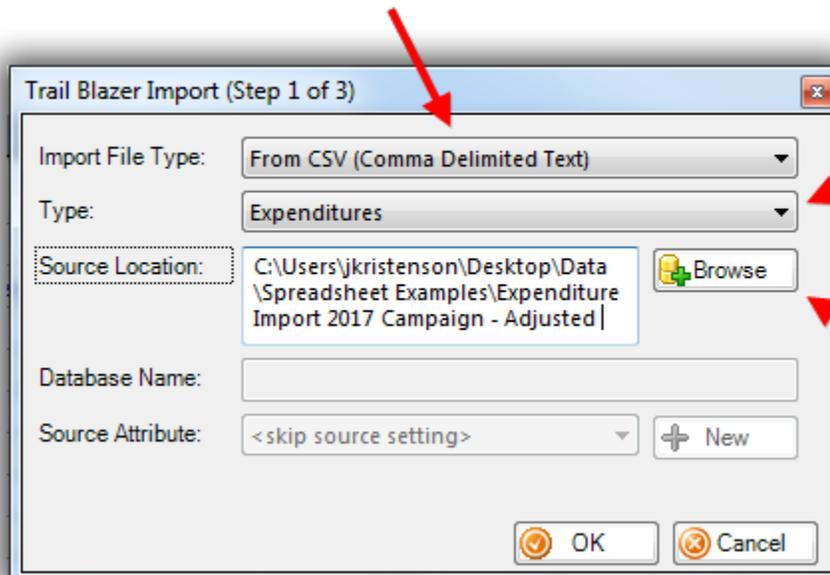
The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and 'Payee List'. The 'File' menu is open, and the 'Import...' option is highlighted with a red arrow. Below the menu, there is a search bar and a 'Company' search form with fields for 'Last Name', 'First Name', and 'ID'. A tooltip for the 'Import...' button reads 'Import new Expenditures (Payees, Invoices, and Payments)'. Below the search area, there is a toolbar with 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', and 'Pivot' options. The main area displays a table titled 'Payee List [164 records found]' with the following columns: ID, Company Name, Code Type, Last Name, First Name, Street, City, State, Zip Code, Payments This Year, Payments Last Year, and Payments Prior Years. The table contains 20 rows of data, including entries for American Express, Premier Global Services, Integra Telecom, Crystal Frolics Committee, Richfield Fourth of July Parade, Glibt Pride Twin Cities, Bill Smith For U.S. House Of Representatives, Inc., At&T, Mn Women's Campaign Fund, Innovative Properties, Llc, Affiliated Insurance Company, Irs, Cd - 5, Hartford Insurance, District 62 Dfl, Senate District 61 Dfl, Modern Screen & Design, Credit Card (Wells Fargo), Insty-prints, Pickartz, The Independent Paper Group, Champion Air, NW Computer Services, Fedex Kinko's, Mn Women's Press/pride, and Us Post Office.

ID	Company Name	Code Type	Last Name	First Name	Street	City	State	Zip Code	Payments This Year	Payments Last Year	Payments Prior Years
23	American Express	ICV	Express	American	PO Box 53852	Phoenix	AZ	85072-3852	.00	.00	100.00
120	Premier Global Services	ICV	Premier Global Servi		PO Box 404351	Atlanta	GA	30384-4351	.00	.00	537.46
66	Integra Telecom	ICV	Integra Telecom		PO Box 2966	Milwaukee	WI	53201	.00	.00	5,181.92
45	Crystal Frolics Committee	ICV			PO Box 28074	Crystal	MN	55428	.00	.00	50.00
121	Richfield Fourth of July Parade	ICV			PO Box 23381	Richfield	MN	55423	.00	.00	100.00
56	Glibt Pride Twin Cities	ICV	Cities	Glibt	PO Box 2104	Minneapolis	MN	55402-0104	.00	.00	210.00
163	Bill Smith For U.S. House Of Representatives, Inc.	ICV	Smith	Bill	PO Box 1341	Chicago	IL	60601	.00	.00	.00
27	At&T	ICV	At&t		P.O. Box 8212	Aurora	IL	60572	.00	55.12	422.94
88	Mn Women's Campaign Fund	ICV			P.O. Box 582944	Minneapolis	MN	55458	.00	.00	1,200.00
64	Innovative Properties, Llc	ICV	Innovative Propertie		P.O. Box 390448	Minneapolis	MN	55439	.00	.00	10,360.00
22	Affiliated Insurance Company	ICV	Affiliated Insurance		P.O. Box 27643	Golden Valley	MN	55427	.00	.00	1,894.00
68	Irs	ICV	Irs		On-line	Kansas City	MO	64999	.00	.00	24,205.92
37	Cd - 5	ICV			John Engevik	Minneapolis	MN	55404	.00	.00	1,000.00
58	Hartford Insurance	ICV	Hartford Insurance		Hartford Plaza, 690 As...	Hartford	CT	06115	.00	.00	704.90
48	District 62 Dfl	UCV			Address Unknown				.00	.00	50.00
125	Senate District 61 Dfl	UCV			Address Unknown				.00	.00	50.00
90	Modern Screen & Design	ICV	Modern Screen & Desi		926 Dale Street N	St. Paul	MN	55103	.00	.00	1,154.64
166	Credit Card (Wells Fargo)	ICV			90 S 7th St	Minneapolis	MN	55415	.00	4,555.12	.00
65	Insty-prints	ICV			8840 7th Ave North	Golden Valley	MN	55427	.00	.00	3,092.81
117	Pickartz	ICV			8400 Coral Sea Street	Blaine	MN	55449	.00	.00	1,712.00
134	The Independent Paper Group	ICV			807 Hampden Avenue	St. Paul	MN	55114	.00	.00	121.40
38	Champion Air	ICV			8009 34th Ave S	Minneapolis	MN	55425	.00	4,999.00	74.20
109	NW Computer Services	ICV	Nw Computer Services		800 Transfer Rd	St. Paul	MN	55114	.00	.00	3,928.50
50	Fedex Kinko's	ICV	Fedex Kinko's	Fedex	7900 Eden Rd	Eden Prairie	MN	55344	.00	.00	330.04
89	Mn Women's Press/pride	ICV			771 Raymond Ave	St. Paul	MN	55114	.00	.00	806.00
139	Us Post Office	ICV			7701 Golden Valley Ro...	Golden Valley	MN	55427	.00	.00	1,842.90

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

4) Make sure the **Import File Type** is set as **CSV (Comma Delimited Text)**. Select '**Expenditures**' from the drop-down for the **Type**. Click [**Browse**] to select the prepped spreadsheet file to import.

1. Leave the file type as **.csv (Comma Separated Value)**.

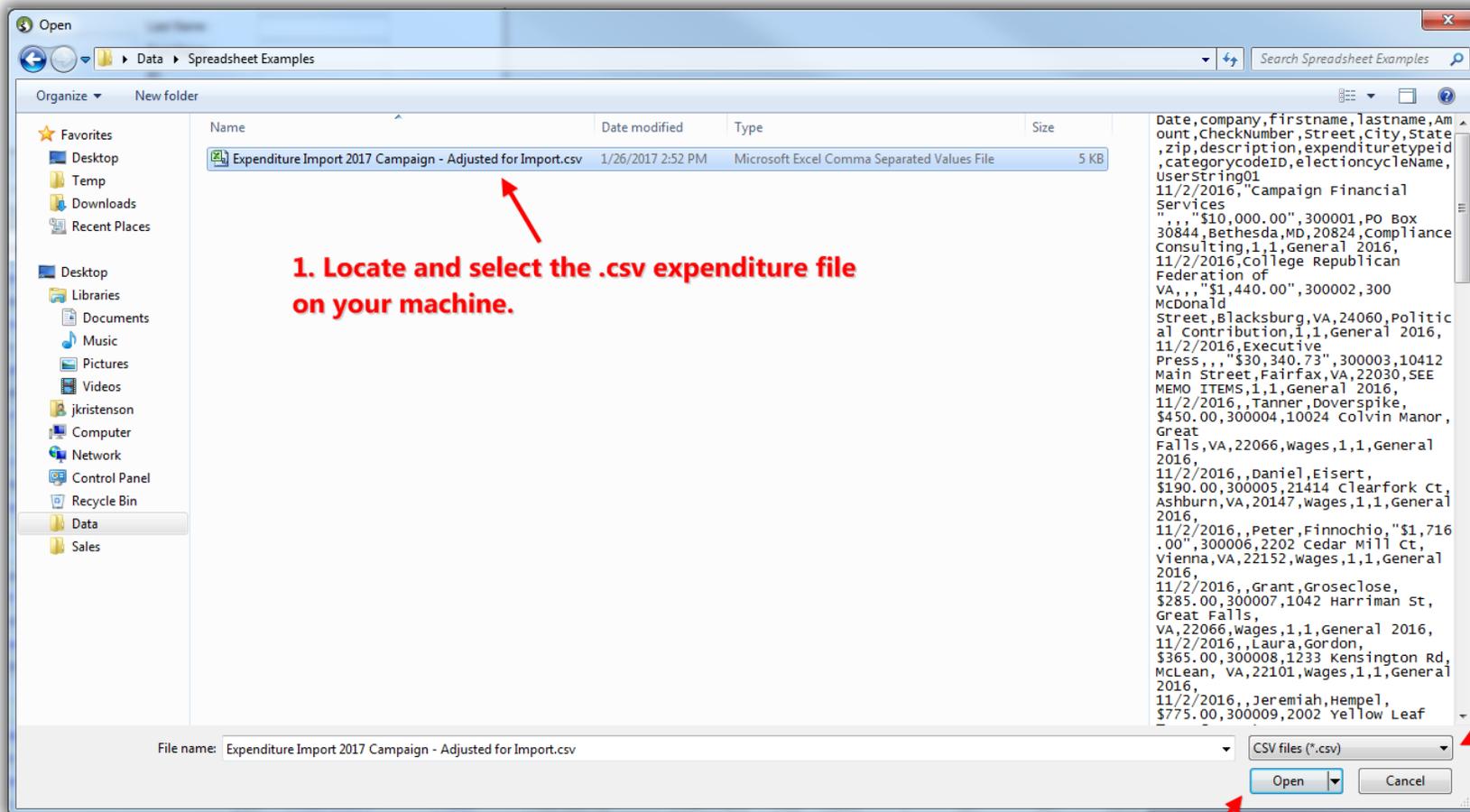


2. Select '**Expenditures**' for the import type.

3. Click [**Browse**] to select the expenditure spreadsheet.

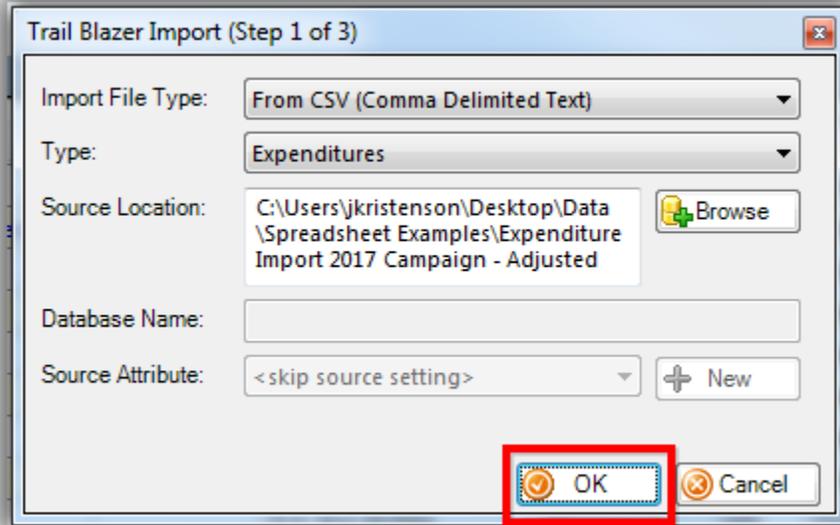
5) **Navigate** to the location where the prepped .csv spreadsheet is **located**, **select** it, and click [**Open**]. *If you don't see the file, make sure that CSV Files is selected in bottom-right. My example is below.*

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)



6) Click **[OK]** once the file has been selected.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

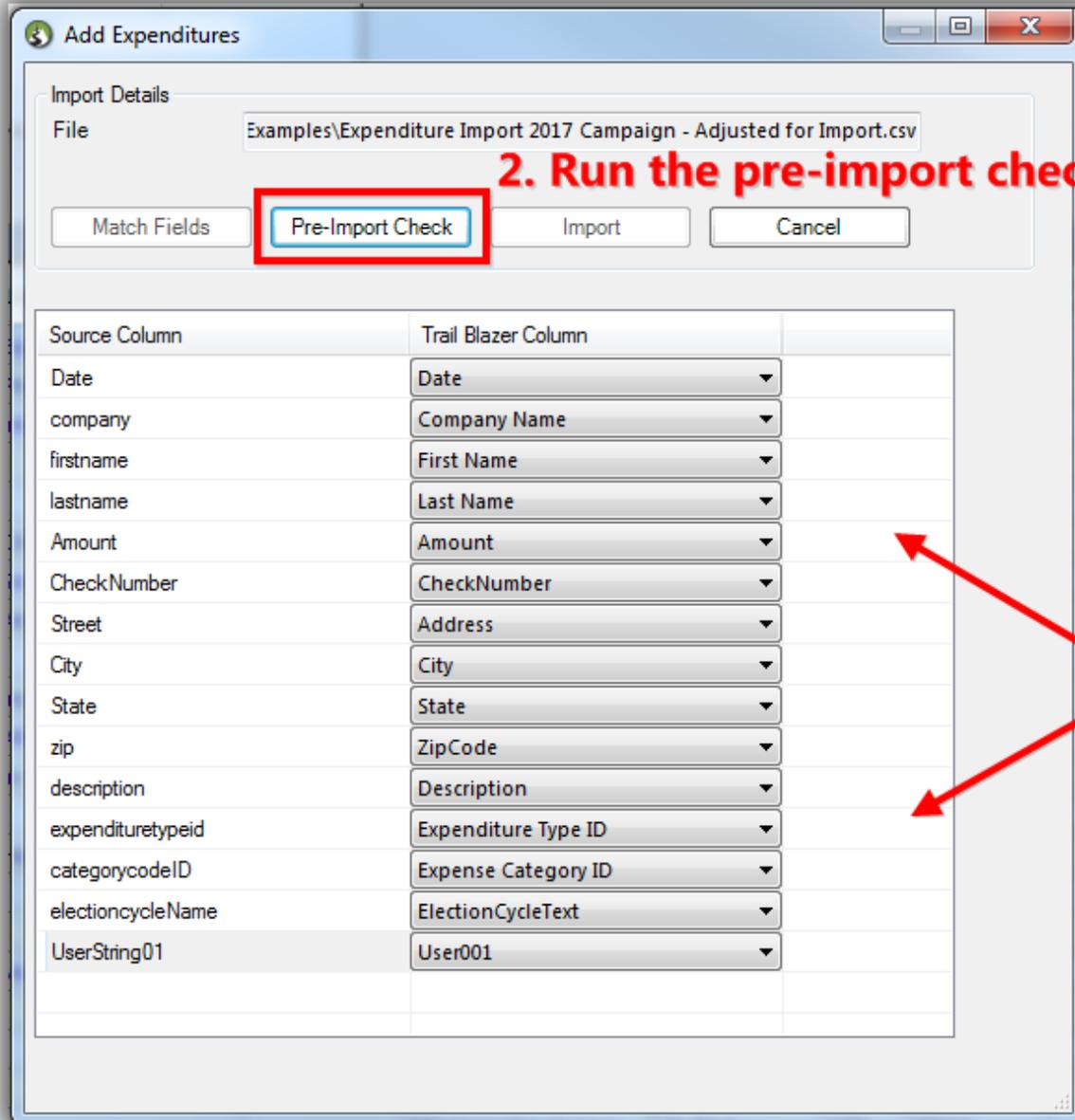


7) The **Add Expenditures** window will open. Click **[Match Fields]**.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

8) **If* you named the column titles in your spreadsheet the same as the example (at the top of this article) the columns will **automatically map**. Otherwise **click** the **corresponding drop-downs** and **select** the appropriate field to map too from the list (Ex: Check Number = CheckNumber). *My example is below.*

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)



2. Run the pre-import check.

Source Column	Trail Blazer Column
Date	Date
company	Company Name
firstname	First Name
lastname	Last Name
Amount	Amount
CheckNumber	CheckNumber
Street	Address
City	City
State	State
zip	ZipCode
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

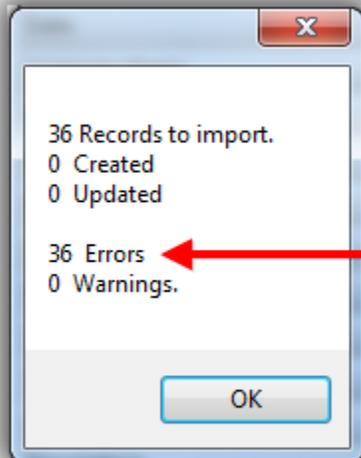
1. Map the required fields.

(If you name them using the spreadsheet example they should automatically map for you).

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

9) Once the fields are mapped correctly click the **[Pre-Import Check]** button (shown in the screenshot above).

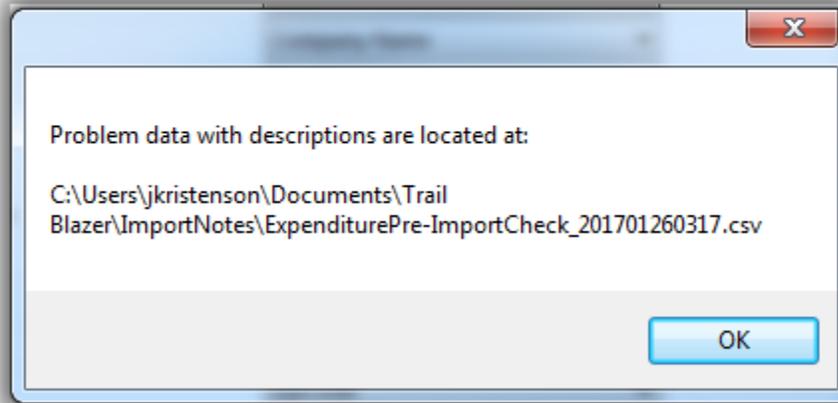
10) Once the pre-import check is finished running you'll be prompted with the results. **if you have **errors** they will **need** to be fixed before you can run the import. **Warnings** should also be fixed but they won't prevent the import from running. In my first attempt I had 36 errors as shown below.*



If you get 'errors' they'll need to be fixed before the import will run. 'Warnings' should also be fixed but the import will still run with warnings present.

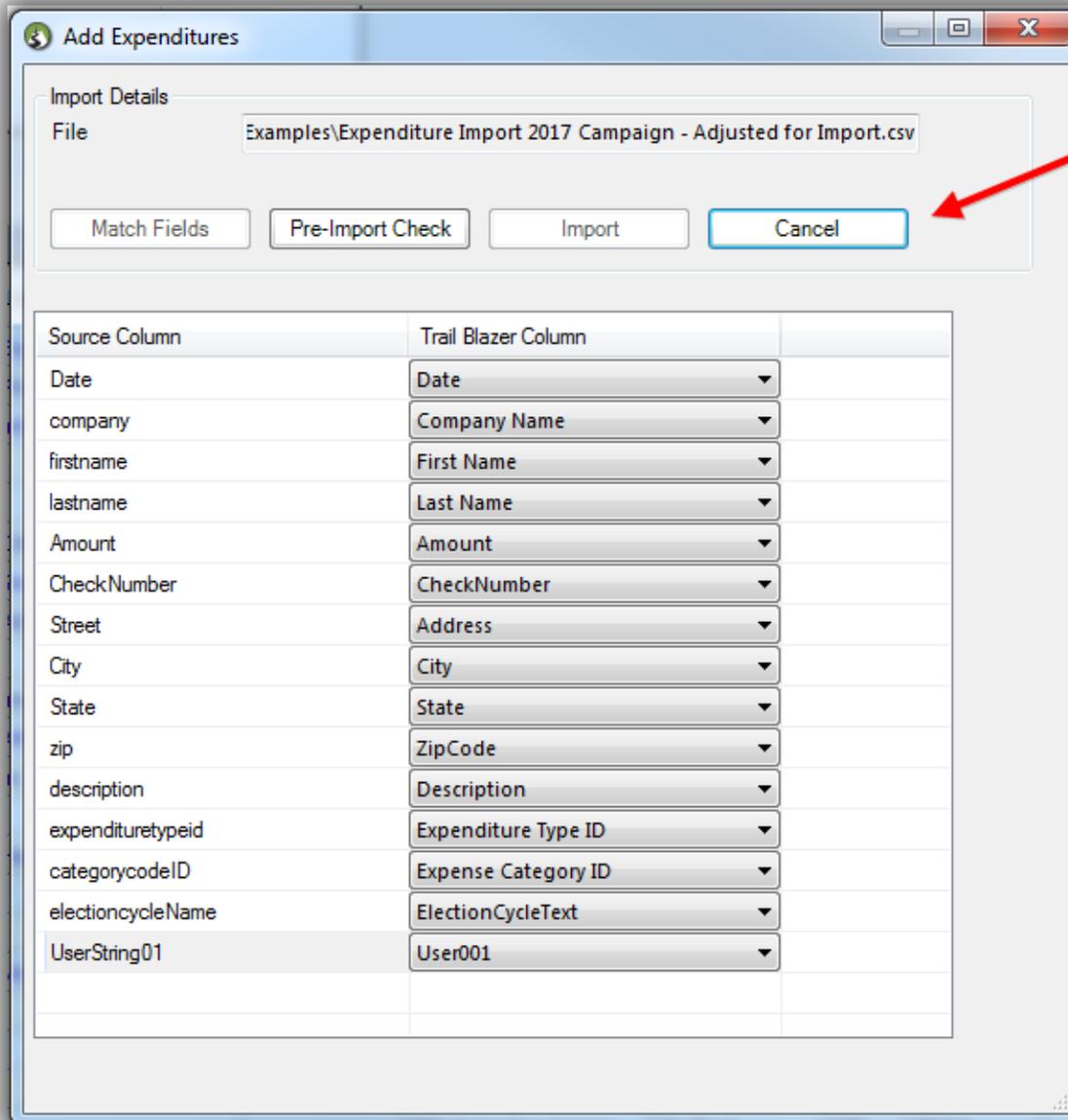
11) If you have any errors or warnings click **[OK]** to open the output file. The file will automatically be saved onto your machine and the directory will be shown.

If you're pre-import check fails you'll get this message. Click [OK] to open the file to make fixes.



12) ****If** you **do** have errors to fix you'll **need** to first **close out** of the **column mapping** screen in **Trail Blazer** by clicking [**Cancel**]. *My example is below. ***If** you **don't** have any errors you can **skip this step** and proceed to the importing of your data.**

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)



Import Details

File: Examples\Expenditure Import 2017 Campaign - Adjusted for Import.csv

Match Fields Pre-Import Check Import **Cancel**

Source Column	Trail Blazer Column
Date	Date
company	Company Name
firstname	First Name
lastname	Last Name
Amount	Amount
CheckNumber	CheckNumber
Street	Address
City	City
State	State
zip	ZipCode
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

***If you do get errors you'll need to [Cancel] out of the import screen in order to make fixes to the original data.**

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

13) **Widen** out the **columns** to view what the **errors** and **warnings** are. *In my example the dollar signs in the amount column are not supported and the errors mention that there are non-numeric values that need to be fixed.*

Go through the error file and fix the errors in the original file. If you need help please contact our live support team by phone or email (1-866-909-8700).

	A	B	C	D	E	F	G	H	I	J	K
1	Date	Company Name	First Name	Last Name	Amount	CheckNumber	Address	City	State	ZipCode	Description
2											
3	11/2/2016	Campaign Financial Services			\$10,000.00	300001	PO Box 30844	Bethesda	MD	20824	Compliance Consulting
4	ERROR: line #2 in the import file has too few items to import.										
5											
6											
7	11/2/2016	College Republican Federation of VA			\$1,440.00	300002	300 McDonald Street	Blacksburg	VA	24060	Political Contribution
8	ERROR: line #3 in the import file has a non-numeric value for Amount.										
9											
10	11/2/2016	Executive Press			\$30,340.73	300003	10412 Main Street	Fairfax	VA	22030	SEE MEMO ITEMS
11	ERROR: line #4 in the import file has a non-numeric value for Amount.										
12											
13	11/2/2016		Tanner	Doverspike	\$450.00	300004	10024 Colvin Manor	Great Falls	VA	22066	Wages
14	ERROR: line #5 in the import file has a non-numeric value for Amount.										
15											
16	11/2/2016		Daniel	Eisert	\$190.00	300005	21414 Clearfork Ct	Ashburn	VA	20147	Wages
17	ERROR: line #6 in the import file has a non-numeric value for Amount.										
18											
19	11/2/2016		Peter	Finochio	\$1,716.00	300006	2202 Cedar Mill Ct	Vienna	VA	22152	Wages
20	ERROR: line #7 in the import file has a non-numeric value for Amount.										

14) **Compare** this error file with the **original** file. Make the **corrections** and **save-and-close** the .csv file. Once those steps are completed you can begin the import/column mapping process again.

Important Note: The pre-import check will look for this **missing** information which is ***required** to run an expenditure import (even if the data in the column is blank):

- Company Name

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

- First Name
- Last Name
- Date
- Amount
- Street
- City
- Zip
- Description
- ExpenditureTypeID
- CategoryCodeID
- Election Cycle Name (a.k.a. cycle for non-profits)

It will also check for this:

- Duplicate column mapped from (source file column names)
- Duplicated column mapped to
- No rows of data
- Too few items in a line of data
- No or non-numeric Expenditure Type ID
- Expenditure Type ID outside range of Trail Blazer's values (currently 1-15):

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

ID	Expenditure Type
1	Regular Committee Operating Expense
2	Contribution to Federal Candidate/Committee
3	In-Kind Contribution to Fed Candidate/Committee
4	Contribution to Non-Federal Candidate/Committee
5	In-Kind Contribution to Non-Federal Candidate/Committee
6	Independent Expenditure Supporting Candidate
7	Independent Expenditure Opposing Candidate
8	Coordinated Expenditure for Federal Candidate
9	Shared Federal/Non-Federal Activity
10	Communication Cost by Corp. Supporting Candidate
11	Communication Cost by Corp. Opposing Candidate
12	Convention Expenditure
13	Earmarked Intermediary Out
14	Earmarked Intermediary Treasury Out
15	Federal Election Activity

- No or non-numeric Expense Category ID
- Expense Category ID that doesn't match any in Trail Blazer. Currently they are:

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

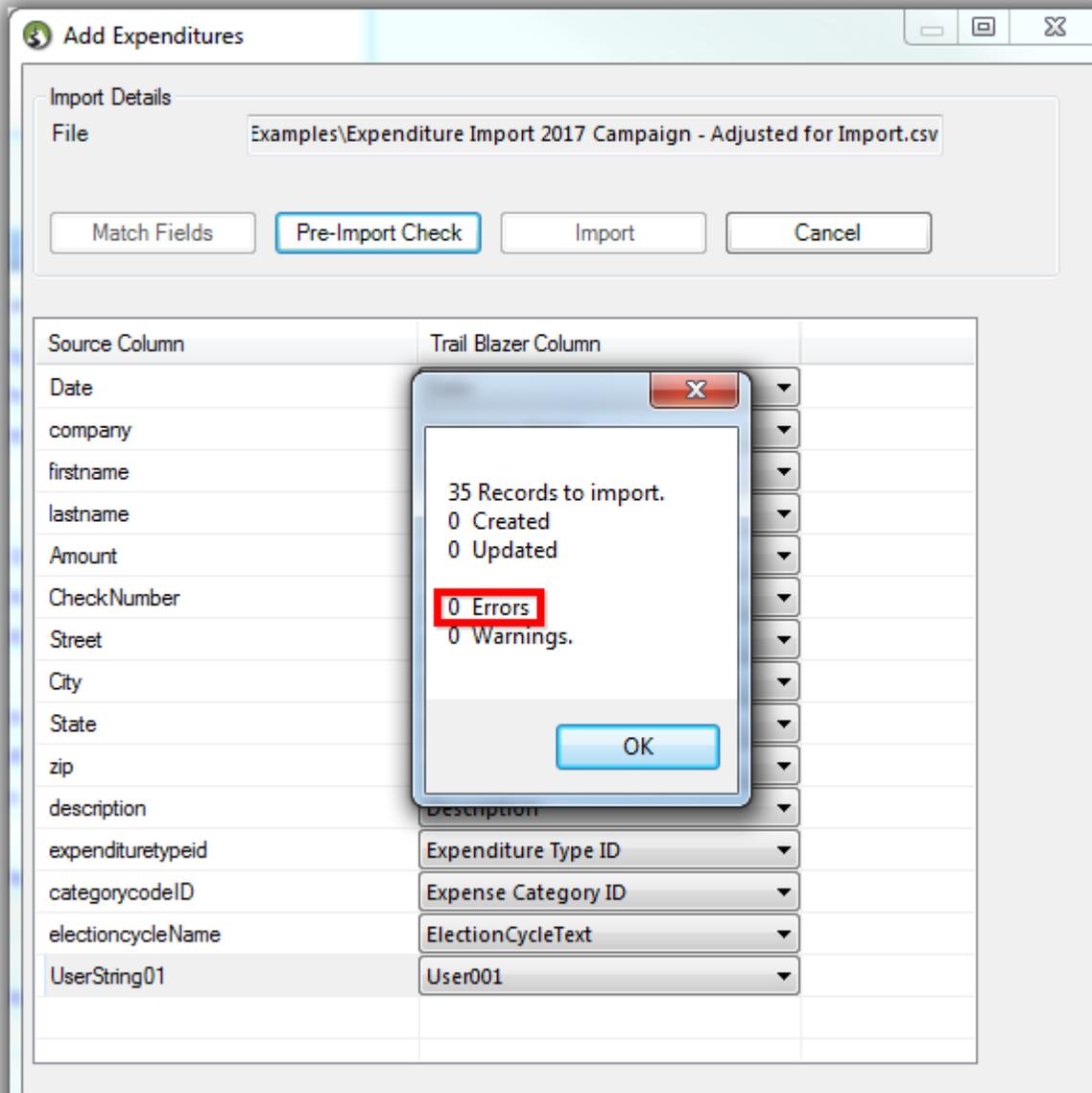
ID	User Description
1	Administrative/Salary/Overhead Expenses
2	Travel Expenses
3	Solicitation and Fundraising Expenses
4	Advertising Expenses
5	Polling Expenses
6	Campaign Materials
7	Campaign Event Expenses
8	Transfers
9	Loan Repayments
10	Refunds of Contributions
11	Political Contributions
12	Donations

 **Tip:** You can add new **expenditure categories** by following **System Manager > Lists > Expenditure Categories > [+ New]**.

- Non-date data for Date
- Non-decimal amount for amount
- No election cycle set up in Trail Blazer matching the one in the data

15) Continue running the pre-import check until **zero errors** occur. *My example is below after making the fixes.*

Once you have zero errors in the pre-import check you can proceed with the import.



The screenshot shows the 'Add Expenditures' dialog box in TrailBlazer. The 'Import Details' section shows the file path: 'Examples\Expenditure Import 2017 Campaign - Adjusted for Import.csv'. Below this are buttons for 'Match Fields', 'Pre-Import Check', 'Import', and 'Cancel'. The 'Pre-Import Check' button is highlighted. A summary dialog box is overlaid on the main dialog, displaying the following information:

Source Column	Trail Blazer Column
Date	
company	
firstname	
lastname	
Amount	
CheckNumber	
Street	
City	
State	
zip	
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

Summary dialog box content:

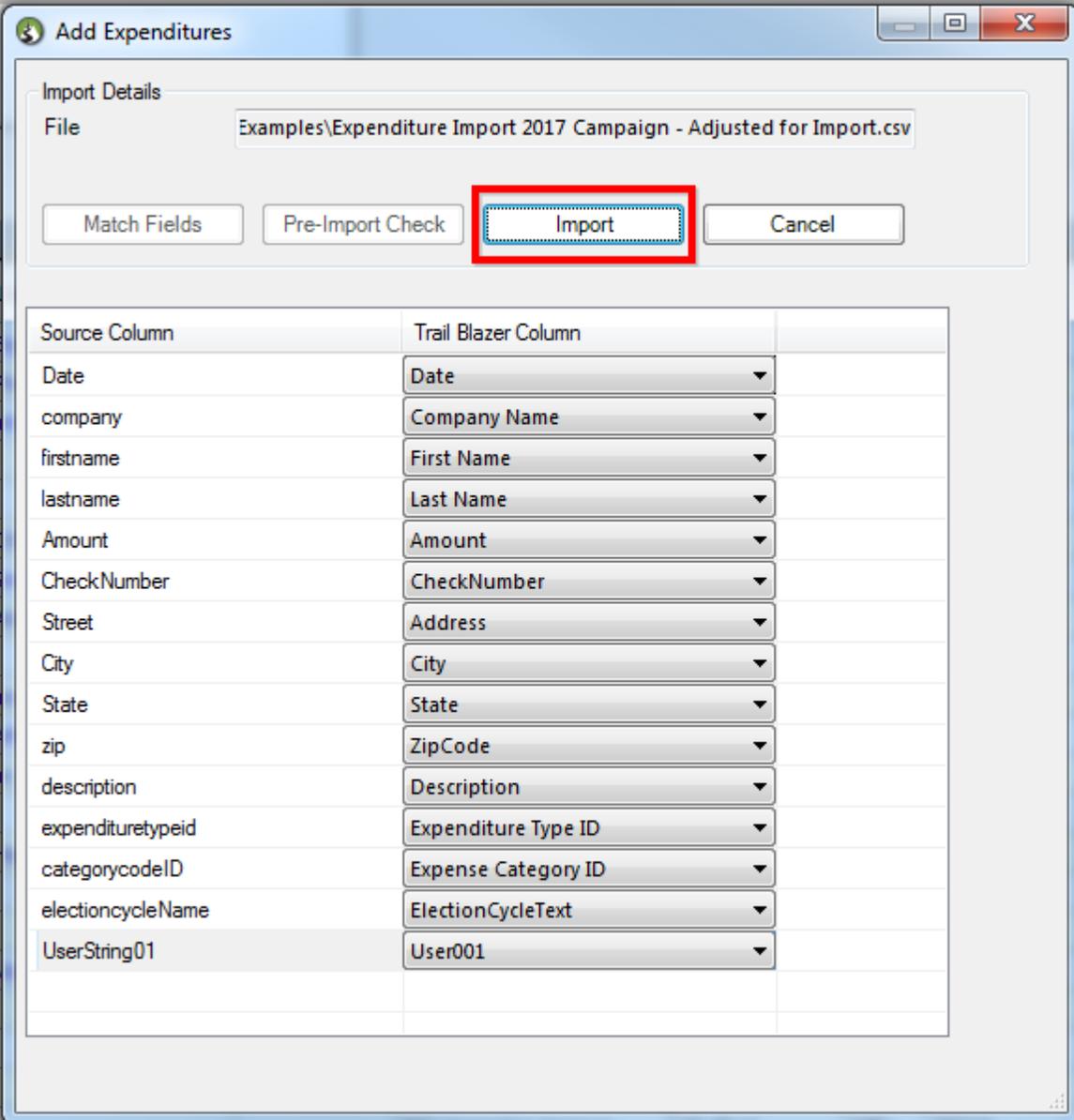
- 35 Records to import.
- 0 Created
- 0 Updated
- 0 Errors** (highlighted with a red box)
- 0 Warnings.

An 'OK' button is located at the bottom of the summary dialog box.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

16) Once the pre-import check passes, click **[Import]**.

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)



Add Expenditures

Import Details

File: Examples\Expenditure Import 2017 Campaign - Adjusted for Import.csv

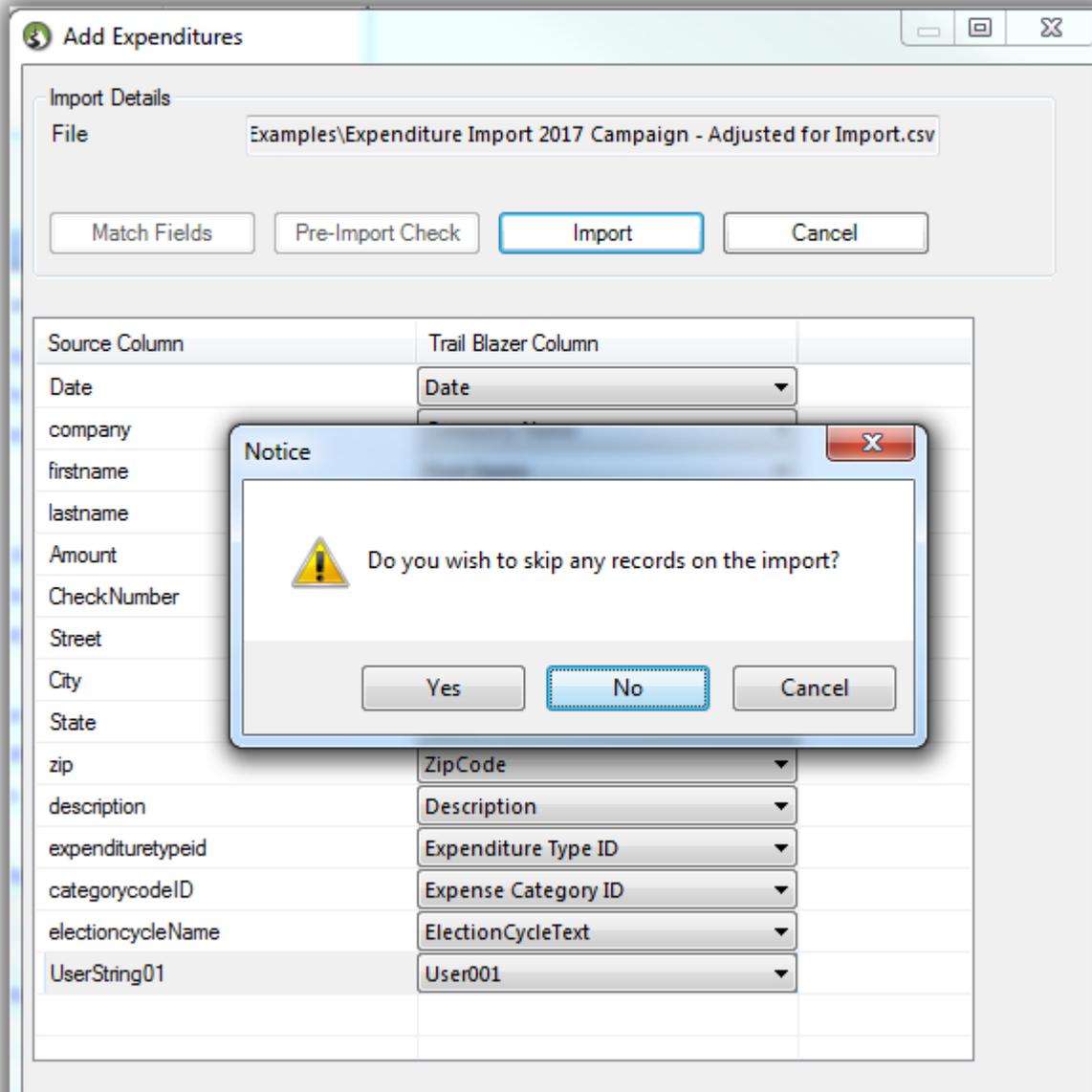
Match Fields Pre-Import Check **Import** Cancel

Source Column	Trail Blazer Column
Date	Date
company	Company Name
firstname	First Name
lastname	Last Name
Amount	Amount
CheckNumber	CheckNumber
Street	Address
City	City
State	State
zip	ZipCode
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

17) You'll be prompted with a pop-up message asking you want to **skip any rows**. Click **[No]** to proceed.

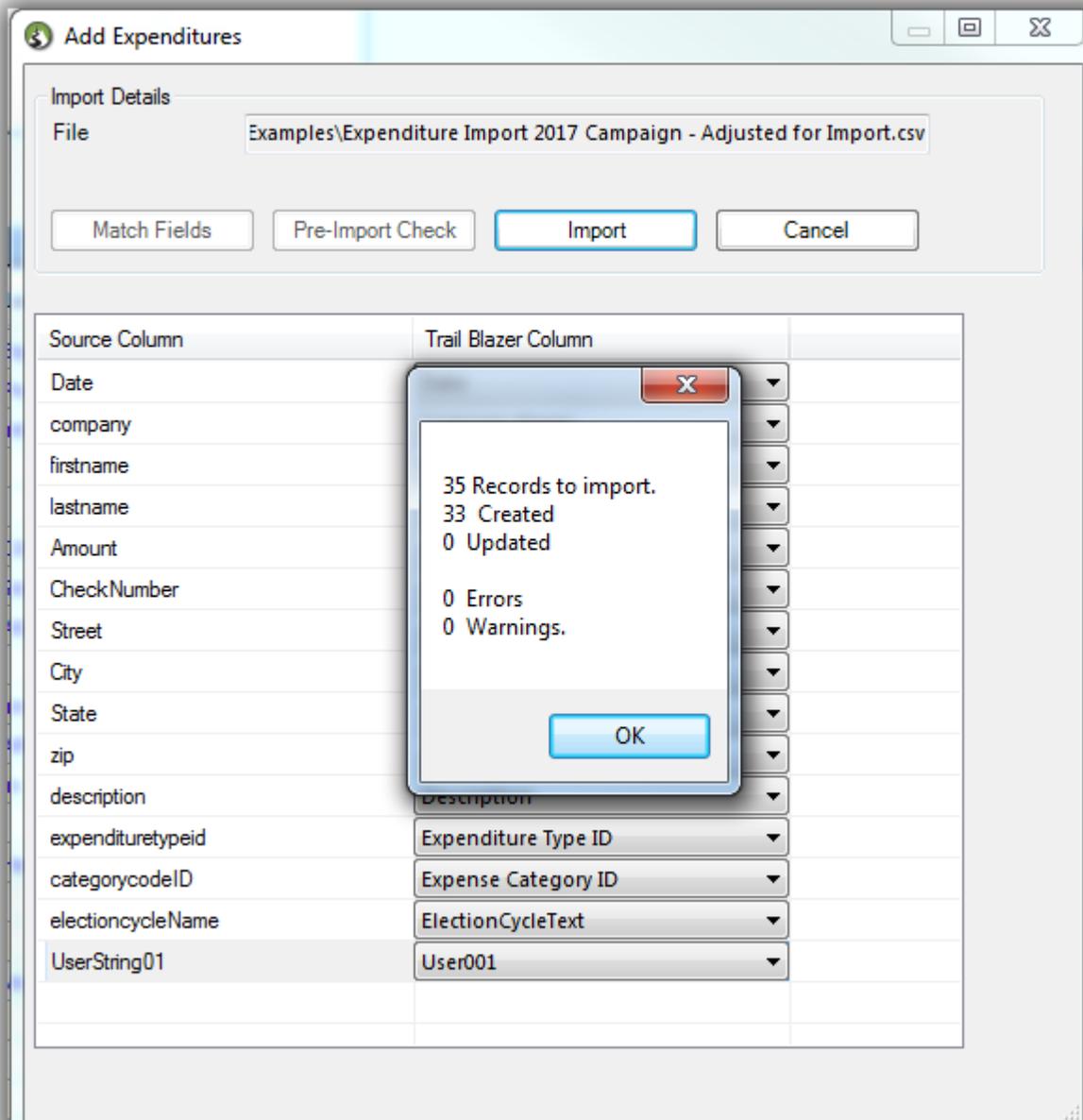
Click [No] to proceed and NOT skip any records during the import.



Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

18) Let the import run and click **[OK]** once you're prompted with the **final results**. *My example is below where 33 records were created.*

Example results from a completed expenditure import.



The screenshot shows the 'Add Expenditures' dialog box in TrailBlazer. The 'Import Details' section shows the file path: 'Examples\Expenditure Import 2017 Campaign - Adjusted for Import.csv'. Below this are buttons for 'Match Fields', 'Pre-Import Check', 'Import', and 'Cancel'. A table below lists source and Trail Blazer columns. A summary dialog box is overlaid on the table, displaying the following information:

Source Column	Trail Blazer Column
Date	
company	
firstname	
lastname	
Amount	
CheckNumber	
Street	
City	
State	
zip	
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

Summary Dialog Box:

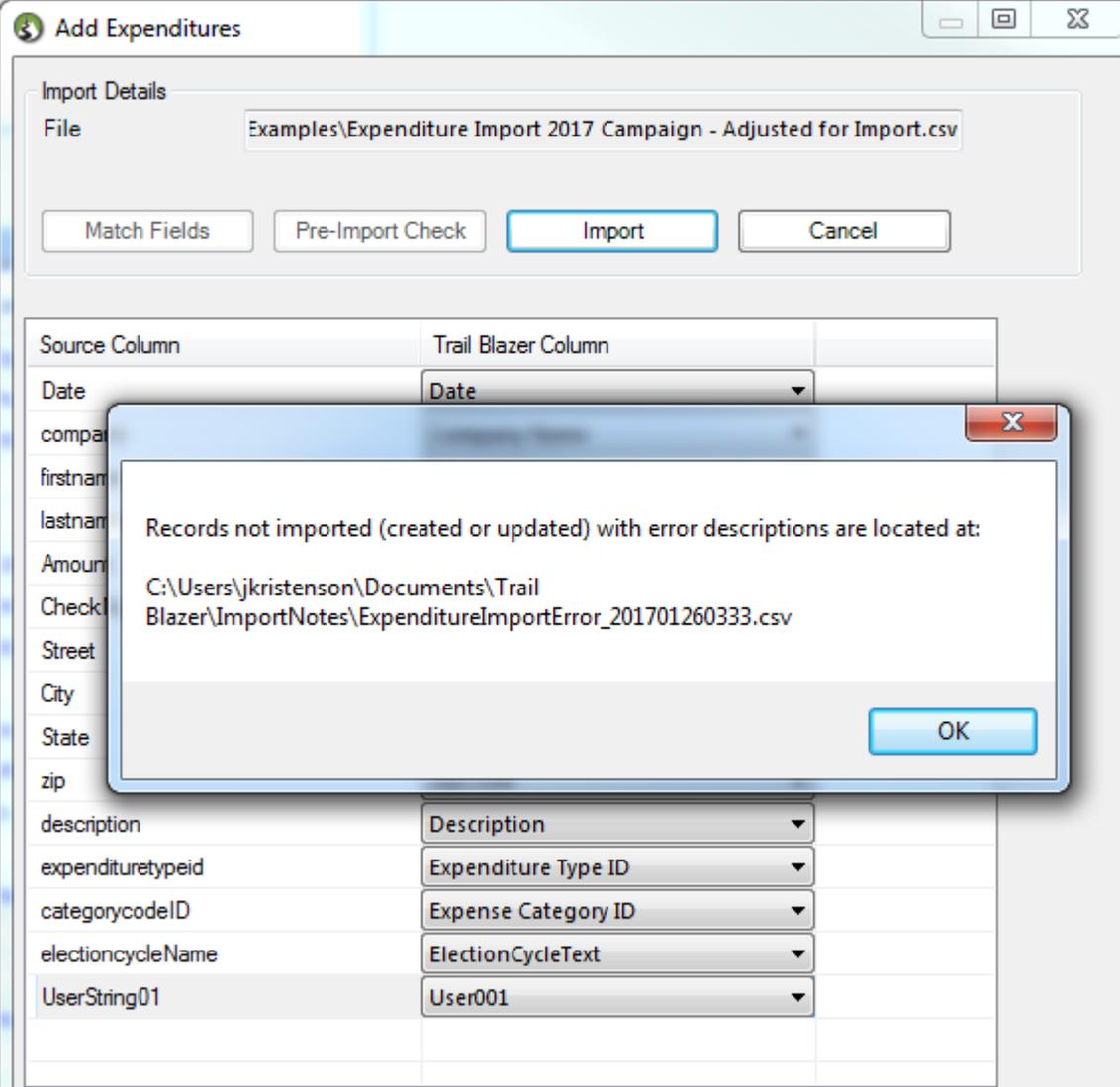
- 35 Records to import.
- 33 Created
- 0 Updated
- 0 Errors
- 0 Warnings.

OK

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

19) **If* any records **weren't created** you'll be prompted with another pop-up message showing where the file is saved. Click **[OK]** to open it and view the results. *Example below.*

***If there were any records that didn't get imported that file will be saved and you can view them.**



The screenshot shows the 'Add Expenditures' dialog box in TrailBlazer. The 'Import Details' section shows the file path: 'Examples\Expenditure Import 2017 Campaign - Adjusted for Import.csv'. Below this are buttons for 'Match Fields', 'Pre-Import Check', 'Import', and 'Cancel'. A table below maps source columns to Trail Blazer columns. An error message dialog box is overlaid on top, stating: 'Records not imported (created or updated) with error descriptions are located at: C:\Users\jkristenson\Documents\Trail Blazer\ImportNotes\ExpenditureImportError_201701260333.csv'. The error dialog has an 'OK' button.

Source Column	Trail Blazer Column
Date	Date
company	
firstnam	
lastnam	
Amount	
Check	
Street	
City	
State	
zip	
description	Description
expendituretypeid	Expenditure Type ID
categorycodeID	Expense Category ID
electioncycleName	ElectionCycleText
UserString01	User001

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

20) Navigate back to the **Payees List** and click **[Search]** to refresh the list and verify the results. *In my example about 30 new payee records were created.*

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

Click [Search] to refresh the Payee List and the new records will display (if any new records were created).

Search Reset + New File Edit Payee List

Favorites **Name** Address SQL

Search all name/address parts (anywhere in the field)

Company :

Last Name :

First Name :

ID:

Edit Sort Format Wrap Export Print Pivot

Payee List [197 records found]

<input type="checkbox"/>	ID	Company Name	Code Type	Last Name	First Name	Street	City	State	Zip Code	Payments This Year	Payments Last Year	Payments Prior Years
<input checked="" type="checkbox"/>	199		OTH	Asquini	Anianna	9600 Waterline Dr	Burke	VA	22015	.00	145.00	.00
<input checked="" type="checkbox"/>	198		OTH	Stegmaier	Dave	117 Keswick Court	Winchester	VA	22602	.00	232.20	.00
<input checked="" type="checkbox"/>	197		OTH	Boudreau	Aaron	10852 Hampton Rd	Fairfax Station	VA	22039	.00	1,065.00	.00
<input checked="" type="checkbox"/>	196		OTH	Chang	Tara	1437 N Woodhouse Road	Virginia Beach	VA	23454	.00	1,765.00	.00
<input checked="" type="checkbox"/>	195	The Strategy Group Company	ICV			7669 Stagers Loop	Delaware	OH	43015	.00	16,897.93	.00
<input checked="" type="checkbox"/>	194		OTH	Corkery	Jack	3011 Dumbarton Street	Washington	DC	20007	.00	1,800.00	.00
<input checked="" type="checkbox"/>	193		OTH	Heeke	Louise	10268 Colony Park Drive	Fairfax	VA	22032	.00	670.00	.00
<input checked="" type="checkbox"/>	192		OTH	Elgendy	Nadia	7204 Oriole Ave	Springfield	VA	22150	.00	225.00	.00
<input checked="" type="checkbox"/>	191	Mark Weiss Associates	ICV			PO Box 34407	Bethesda	MD	20827	.00	3,150.00	.00
<input checked="" type="checkbox"/>	190		OTH	Codey	Kyle	6063 6th St N	Arlington	VA	22033	.00	465.00	.00
<input checked="" type="checkbox"/>	189		OTH	Migli	Nicholas	15027 Seneca Knoll Way	Haymarket	VA	20169	.00	170.00	.00
<input checked="" type="checkbox"/>	188	Northern Virginia Media Services	ICV			PO Box 591	Leesburg	VA	20176	.00	1,090.00	.00
<input checked="" type="checkbox"/>	187	Capital One	ICV			200 South 10th Street, Su...	Richmond	VA	23219	.00	450.00	.00
<input checked="" type="checkbox"/>	186	Berke Farah Lip	ICV			1200 New Hampshire Ave...	Washington	DC	20036	.00	6,475.00	.00
<input checked="" type="checkbox"/>	185	Gula Graham	ICV			499 South Capitol Street ...	Washington	DC	20003	.00	4,513.04	.00

results

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)

 **Tip:** Setup a **training class** with one of our financial trainers to learn how to correctly manage your finances in your database, and how to file FEC reports (if a federal campaign or PAC).

Review the **related resources** below to learn more about **importing** and the other **financial tools** in **Trail Blazer**.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [How to Enter an Invoice and Payment with the New Payment System, and How to Add a Refund and Deduction](#)

Article: [Delete an Invoice/Payment](#)

Article: [How to Enter an Invoice for a Payee](#)

Article: [How to Enter an Expenditure Refund](#)

Article: [Do I have to Create an Invoice Before I Create a Payment](#)

Article: [Expenditure Reimbursement Schedule A itemization](#)

Article: [How to Un-Deposit a Contribution \(Primarily for Political Customers\)](#)

Article: [Delete a Contribution](#)

Article: [Import Templates](#)

Article: [Pre-Import Check](#)

Article: [Start Import – Importing Data From Access – Add/Update Voter](#)

Article: [Import Information – Definitions and Column Data Type](#)

Article: [Field/Column Mapping When Importing Voter/Donor Data](#)

Video: [Importing 102 Importing your first list](#)

Video: [Importing 201 Merge or Do Not Merge during import](#)

Video: [Importing 101 What to avoid](#)

Video: [Importing Contributions](#)

Video: [Attributes – Import with Date and Value](#)

Video: [Excel- Leading0s – Retaining When Opening CSV Files In Excel](#)

Video: [Enter Invoice and Make Immediate Payment](#)

Video: [Credit Card Memo Entry \(using 2015 version of Financial\)](#)

Video Playlist: [Importing](#)

Trail Blazer Live Support

📞 **Phone:** 1-866-909-8700

✉️ **Email:** support@trailblz.com

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*

Steps to Import Expenditures – Example Spreadsheet – Political Only (Requires Trail Blazer Support to Run the Import)
