When an Advancement employee wishes to Import a spreadsheet of Interactions into CADENCE in bulk, follow these steps. Please note there is a minimum number of 50 records when requesting a bulk import.

1. Retrieve the template file ‘Bulk Import Interactions Template’ from the documentation library, or at this link: <https://forever.clemson.edu/document.doc?id=1144>
2. Fill out Spreadsheet using guidelines below.
	1. Do not change the name of any column headings
	2. Do not add column headings
		1. If another column is needed contact the Advancement IT Help Desk for assistance.
		2. For example, if you want to have the interaction linked to a designation, add the ‘Fund ID’ column, and then let Advancement IT Help Desk know when you send the interaction load request that the column is included.
	3. Use table below for Column Data needs.
		1. Columns that are not required can be left Blank if not needed by submitter
3. Verify all data in spreadsheet
	1. Ensure that Category and Subcategory are active and are a valid combination
4. Submit file to Power User for your department.
5. Users should submit their uploads through the Create an Advancement IT Help Desk Ticket form and continue to direct issues related to queries, reports, new data fields, and access roles to their Data Steward.
6. File exceptions are handled Manually by Submitter.

|  |  |
| --- | --- |
| **Column Name** | **Notes** |
| Constituent lookup ID | Required |
| Constituent name | Not Required, use by submitter to confirm information |
| Summary (i.e. title) | Required, Max Size 100 characters, use comments for larger data |
| Status | Required |
| Contact method | Required |
| Category | Required |
| Subcategory | Required |
| Owner CADENCE lookup ID | Required, Solicitor for Action |
| Expected date (MM/DD/YYYY) | Required |
| Actual date (MM/DD/YYYY) | Required if Status is completed |
| Comment | Not Required  |
| Event | Not Required  |
| Participants Participant 1 CADENCE lookup ID | Not Required, additional constituent to have interaction on their record  |
| Participants Participant 2 CADENCE lookup ID | Not Required, additional constituent to have interaction on their record  |
| Stewardship Action Level | Not Required, unless action detail is filled in  |
| Stewardship Action Detail | Not Required, unless action level is filled in  |