

# Contribution File Template Instructions

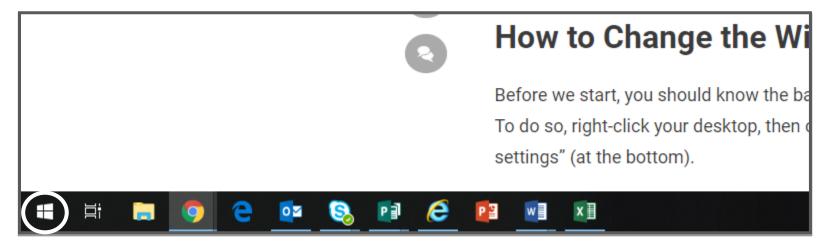
These instructions accompany the CSV Template. The template is used for the creation of a Defined Benefit, Cash Balance or Accounts Receivable Contribution File. This template is a tool to be used by smaller employers who do not have an automated way to create Contribution Files.

Revised: 07/08/2020

# 1) Changing Windows Default Delimiter

#### Step 1:

Click the **Microsoft Windows** icon in the bottom left-hand corner of your screen.





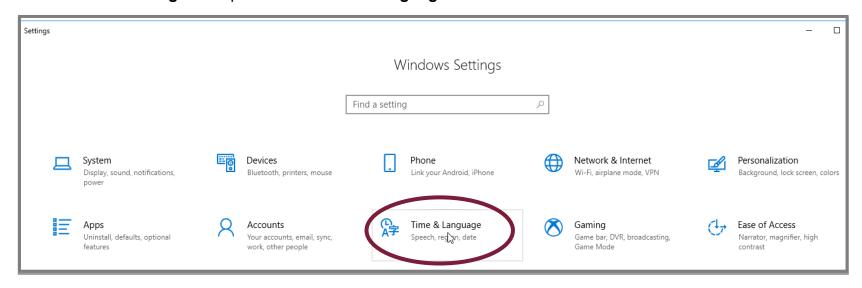
#### Step 2:

Click the **Gear Icon** to open the **Settings**.



# Step 3:

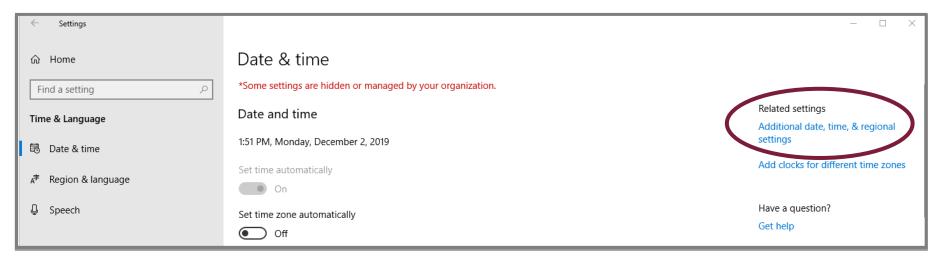
The Windows Settings box opens. Click Time & Language.





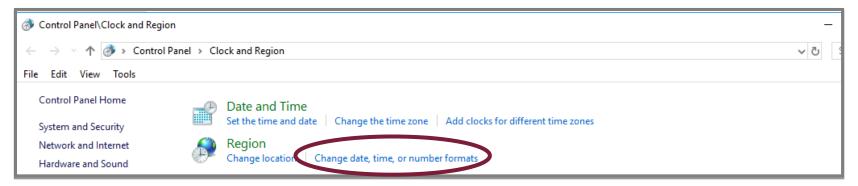
#### Step 4:

Under Related settings click the blue hyperlink for Additional date, time & regional settings.



#### Step 5:

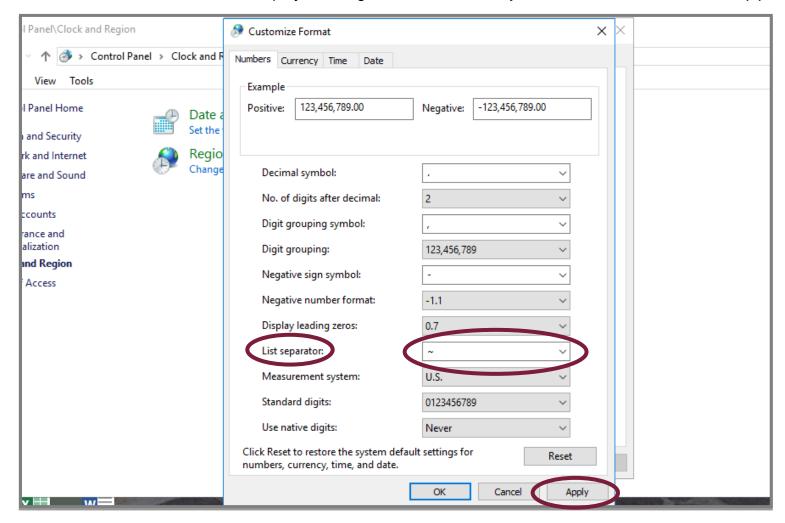
The Control Panel opens. Click the blue hyperlink for Change date, time or number formats.





# Step 6:

The Customize Format window displays. Change the default List separator from a comma to a tilde (~) and click Apply.

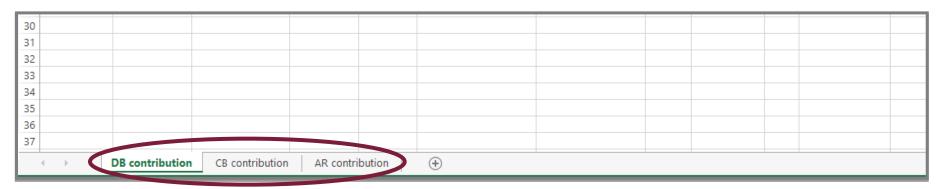




# 2) Creating a Contribution File

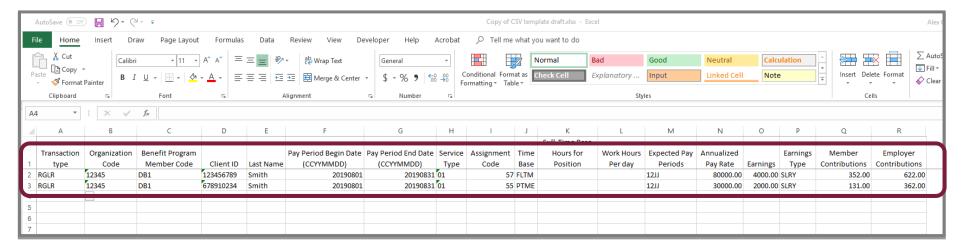
#### Step 1:

At the bottom of the template, select the appropriate tab for the file type you want to create.



#### Step 2:

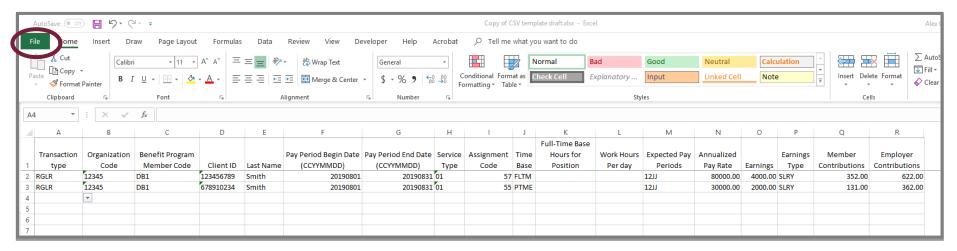
Enter information into each column as needed. You may enter up to 999 records.





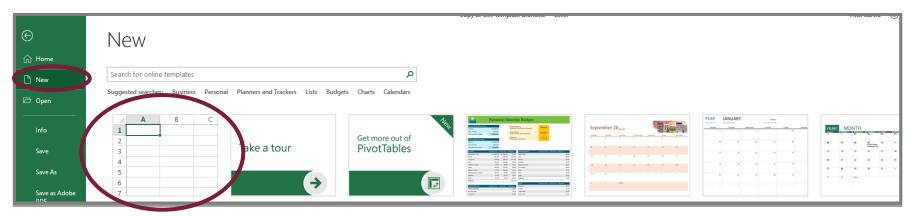
#### Step 3:

After you've entered all your records, open a new Excel Workbook. In the top right hand corner click File.



#### Step 4:

Click New, then Blank Workbook. A blank workbook displays.

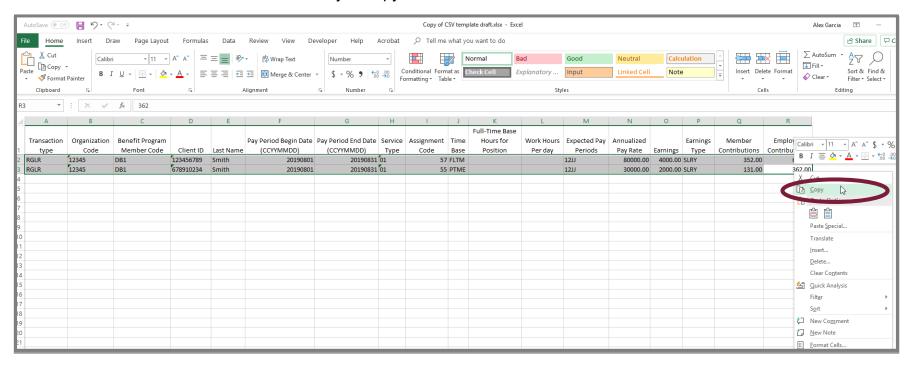




#### Step 5:

Highlight the records you input into the template. Right click and select Copy.

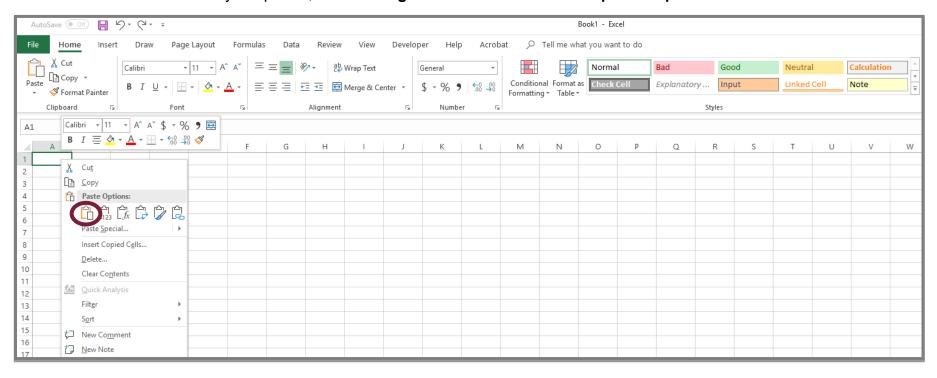
Note: Do not include the Row Headers when you copy the records.





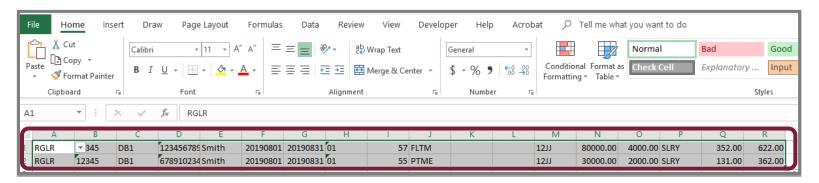
#### Step 6:

Switch to the blank workbook you opened, in cell A1 right click and select the first paste clipboard.



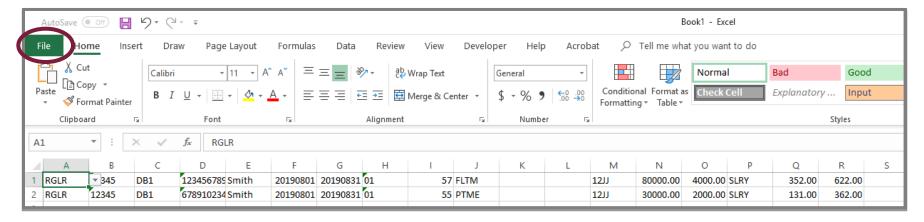
# Step 7:

The record details you copied display.



#### Step 8:

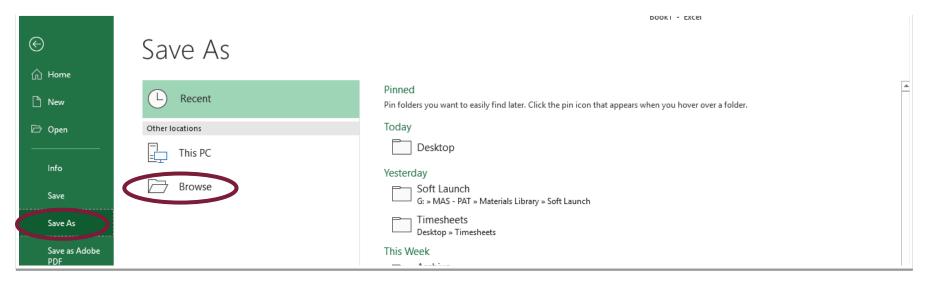
In the new workbook, click File.





### Step 9:

Click Save As, then click Browse. The Save As window appears.



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#### **Step 10:**

Select where you would like to save your file. In the Save as Type dropdown menu, select "CSV (Comma delimited) \*.csv."

