

Data Import Format Specification for Batch Donation Direct Bill Import

Field #	Field Name	Data Type	Maximum Length	Required Field
1	DonorIdentifier	Text	50	Y
2	DonationAmount	Currency	10	Y
3	DesignationAmountType	Numeric	1	Y
4	FrequencyType	Numeric	1	Y
5	BillingStartDate	LongDate	8	Y
6	PaymentAddress1	Text	100	Y
7	PaymentAddress2	Text	100	N
8	BillingCity	Text	50	Y
9	BillingState	Text	200	Y
10	BillingZipCode	Text	10	Y
11	BillingZipCodeExt	Numeric	4	N
12	BillingCountryCode	Text	2	N
13	Agency1DesignationAccountNumber	Text	50	N
14	Agency1DesignationAmount	Numeric	8	N
15	Agency2DesignationAccountNumber	Text	50	N
16	Agency2DesignationAmount	Numeric	8	N
17	Agency3DesignationAccountNumber	Text	50	N
18	Agency3DesignationAmount	Numeric	8	N
19	Agency4DesignationAccountNumber	Text	50	N
20	Agency4DesignationAmount	Numeric	8	N
21	Agency5DesignationAccountNumber	Text	50	N
22	Agency5DesignationAmount	Numeric	8	N
23	Agency6DesignationAccountNumber	Text	50	N
24	Agency6DesignationAmount	Numeric	8	N
25	Agency7DesignationAccountNumber	Text	50	N
26	Agency7DesignationAmount	Numeric	8	N
27	Agency8DesignationAccountNumber	Text	50	N
28	Agency8DesignationAmount	Numeric	8	N
29	WriteInAgency1Name	Text	50	N
30	WriteInAgency1EIN	Numeric	9	N
31	WriteInAgency1DesignationAmount	Numeric	8	N
32	WriteInAgency1Address1	Text	100	N
33	WriteInAgency1Address2	Text	100	N
34	WriteInAgency1City	Text	50	N
35	WriteInAgency1State	Text	200	N
36	WriteInAgency1ZipCode	Text	10	N
37	WriteInAgency1ZipCodeExt	Numeric	4	N
38	WriteInAgency1CountryCode	Text	2	N
39	WriteInAgency1Contact	Text	100	N
40	WriteInAgency1Phone	Text	10	N
41	WriteInAgency1EmailAddress	Email	50	N
42	WriteInAgency2Name	Text	50	N
43	WriteInAgency2EIN	Numeric	9	N

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44	WritelnAgency2DesignationAmount	Numeric	8	N
45	WritelnAgency2Address1	Text	100	N
46	WritelnAgency2Address2	Text	100	N
47	WritelnAgency2City	Text	50	N
48	WritelnAgency2State	Text	200	N
49	WritelnAgency2ZipCode	Text	10	N
50	WritelnAgency2ZipCodeExt	Numeric	4	N
51	WritelnAgency2CountryCode	Text	2	N
52	WritelnAgency2Contact	Text	100	N
53	WritelnAgency2Phone	Text	10	N
54	WritelnAgency2EmailAddress	Email	50	N
55	WritelnAgency3Name	Text	50	N
56	WritelnAgency3EIN	Numeric	9	N
57	WritelnAgency3DesignationAmount	Numeric	8	N
58	WritelnAgency3Address1	Text	100	N
59	WritelnAgency3Address2	Text	100	N
60	WritelnAgency3City	Text	50	N
61	WritelnAgency3State	Text	200	N
62	WritelnAgency3ZipCode	Text	10	N
63	WritelnAgency3ZipCodeExt	Numeric	4	N
64	WritelnAgency3CountryCode	Text	2	N
65	WritelnAgency3Contact	Text	100	N
66	WritelnAgency3Phone	Text	10	N
67	WritelnAgency3EmailAddress	Text	50	N
68	WritelnAgency4Name	Text	50	N
69	WritelnAgency4EIN	Numeric	9	N
70	WritelnAgency4DesignationAmount	Numeric	8	N
71	WritelnAgency4Address1	Text	100	N
72	WritelnAgency4Address2	Text	100	N
73	WritelnAgency4City	Text	50	N
74	WritelnAgency4State	Text	200	N
75	WritelnAgency4ZipCode	Text	10	N
76	WritelnAgency4ZipCodeExt	Numeric	4	N
77	WritelnAgency4CountryCode	Text	2	N
78	WritelnAgency4Contact	Text	100	N
79	WritelnAgency4Phone	Text	10	N
80	WritelnAgency4EmailAddress	Text	50	N
81	WritelnAgency5Name	Text	50	N
82	WritelnAgency5EIN	Numeric	9	N
83	WritelnAgency5DesignationAmount	Numeric	8	N
84	WritelnAgency5Address1	Text	100	N
85	WritelnAgency5Address2	Text	100	N
86	WritelnAgency5City	Text	50	N
87	WritelnAgency5State	Text	200	N
88	WritelnAgency5ZipCode	Text	10	N

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89	WritelnAgency5ZipCodeExt	Numeric	4	N
90	WritelnAgency5CountryCode	Text	2	N
91	WritelnAgency5Contac	Text	100	N
92	WritelnAgency5Phone	Text	10	N
93	WritelnAgency5EmailAddress	Text	50	N
94	WritelnAgency6Name	Text	50	N
95	WritelnAgency6EIN	Numeric	9	N
96	WritelnAgency6DesignationAmount	Numeric	8	N
97	WritelnAgency6Address1	Text	100	N
98	WritelnAgency6Address2	Text	100	N
99	WritelnAgency6City	Text	50	N
100	WritelnAgency6State	Text	200	N
101	WritelnAgency6ZipCode	Text	10	N
102	WritelnAgency6ZipCodeExt	Numeric	4	N
103	WritelnAgency6CountryCode	Text	2	N
104	WritelnAgency6Contact	Text	100	N
105	WritelnAgency6Phone	Text	10	N
106	WritelnAgency6EmailAddress	Text	50	N
107	WritelnAgency7Name	Text	50	N
108	WritelnAgency7EIN	Numeric	9	N
109	WritelnAgency7DesignationAmount	Numeric	8	N
110	WritelnAgency7Address1	Text	100	N
111	WritelnAgency7Address2	Text	100	N
112	WritelnAgency7City	Text	50	N
113	WritelnAgency7State	Text	200	N
114	WritelnAgency7ZipCode	Text	10	N
115	WritelnAgency7ZipCodeExt	Numeric	4	N
116	WritelnAgency7CountryCode	Text	2	N
117	WritelnAgency7Contact	Text	100	N
118	WritelnAgency7Phone	Text	10	N
119	WritelnAgency7EmailAddress	Text	50	N
120	WritelnAgency8Name	Text	50	N
121	WritelnAgency8EIN	Numeric	9	N
122	WritelnAgency8DesignationAmount	Numeric	8	N
123	WritelnAgency8Address1	Text	100	N
124	WritelnAgency8Address2	Text	100	N
125	WritelnAgency8City	Text	50	N
126	WritelnAgency8State	Text	200	N
127	WritelnAgency8ZipCode	Text	10	N
128	WritelnAgency8ZipCodeExt	Numeric	4	N
129	WritelnAgency8CountryCode	Text	2	N
130	WritelnAgency8Contact	Text	100	N
131	WritelnAgency8Phone	Text	10	N
132	WritelnAgency8EmailAddress	Text	50	N
133	NegativeDesignation	Text	1000	N

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134	AcknowledgementQuestion1Answer	Text	1	N
135	AcknowledgementQuestion2Answer	Text	1	N
136	AcknowledgementQuestion3Answer	Text	1	N
137	AcknowledgementQuestion4Answer	Text	1	N
138	AcknowledgementQuestion5Answer	Text	1	N
139	AcknowledgementQuestion6Answer	Text	1	N
140	AcknowledgementQuestion7Answer	Text	1	N
141	Comment	Text	255	N
142	HomeEmailAddress	Text	50	N
143	Designation1AllowReleaseDonorData	Text	1	N
144	Designation1SpecialInstructions	Text	255	N
145	Designation1RecognitionType	Numeric	1	N
146	Designation1RecognitionName	Text	100	N
147	Designation1AcknowledgementName	Text	100	N
148	Designation1AcknowledgementAddress1	Text	100	N
149	Designation1AcknowledgementAddress2	Text	100	N
150	Designation1AcknowledgementCity	Text	50	N
151	Designation1AcknowledgementState	Text	100	N
152	Designation1AcknowledgementZipCode	Text	50	N
153	Designation1AcknowledgementZipCodeExt	Numeric	4	N
154	Designation1AcknowledgementCountryCode	Text	2	N
155	Designation2AllowReleaseDonorData	Text	1	N
156	Designation2SpecialInstructions	Text	255	N
157	Designation2RecognitionType	Numeric	1	N
158	Designation2RecognitionName	Text	100	N
159	Designation2AcknowledgementName	Text	100	N
160	Designation2AcknowledgementAddress1	Text	100	N
161	Designation2AcknowledgementAddress2	Text	100	N
162	Designation2AcknowledgementCity	Text	50	N
163	Designation2AcknowledgementState	Text	100	N
164	Designation2AcknowledgementZipCode	Text	50	N
165	Designation2AcknowledgementZipCodeExt	Numeric	4	N
166	Designation2AcknowledgementCountryCode	Text	2	N
167	Designation3AllowReleaseDonorData	Text	1	N
168	Designation3SpecialInstructions	Text	255	N
169	Designation3RecognitionType	Numeric	1	N
170	Designation3RecognitionName	Text	100	N
171	Designation3AcknowledgementName	Text	100	N
172	Designation3AcknowledgementAddress1	Text	100	N
173	Designation3AcknowledgementAddress2	Text	100	N
174	Designation3AcknowledgementCity	Text	50	N
175	Designation3AcknowledgementState	Text	100	N
176	Designation3AcknowledgementZipCode	Text	50	N
177	Designation3AcknowledgementZipCodeExt	Numeric	4	N
178	Designation3AcknowledgementCountryCode	Text	2	N

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179	Designation4AllowReleaseDonorData	Text	1	N
180	Designation4SpecialInstructions	Text	255	N
181	Designation4RecognitionType	Numeric	1	N
182	Designation4RecognitionName	Text	100	N
183	Designation4AcknowledgementName	Text	100	N
184	Designation4AcknowledgementAddress1	Text	100	N
185	Designation4AcknowledgementAddress2	Text	100	N
186	Designation4AcknowledgementCity	Text	50	N
187	Designation4AcknowledgementState	Text	100	N
188	Designation4AcknowledgementZipCode	Text	50	N
189	Designation4AcknowledgementZipCodeExt	Numeric	4	N
190	Designation4AcknowledgementCountryCode	Text	2	N
191	Designation5AllowReleaseDonorData	Text	1	N
192	Designation5SpecialInstructions	Text	255	N
193	Designation5RecognitionType	Numeric	1	N
194	Designation5RecognitionName	Text	100	N
195	Designation5AcknowledgementName	Text	100	N
196	Designation5AcknowledgementAddress1	Text	100	N
197	Designation5AcknowledgementAddress2	Text	100	N
198	Designation5AcknowledgementCity	Text	50	N
199	Designation5AcknowledgementState	Text	100	N
200	Designation5AcknowledgementZipCode	Text	50	N
201	Designation5AcknowledgementZipCodeExt	Numeric	4	N
202	Designation5AcknowledgementCountryCode	Text	2	N
203	Designation6AllowReleaseDonorData	Text	1	N
204	Designation6SpecialInstructions	Text	255	N
205	Designation6RecognitionType	Numeric	1	N
206	Designation6RecognitionName	Text	100	N
207	Designation6AcknowledgementName	Text	100	N
208	Designation6AcknowledgementAddress1	Text	100	N
209	Designation6AcknowledgementAddress2	Text	100	N
210	Designation6AcknowledgementCity	Text	50	N
211	Designation6AcknowledgementState	Text	100	N
212	Designation6AcknowledgementZipCode	Text	50	N
213	Designation6AcknowledgementZipCodeExt	Numeric	4	N
214	Designation6AcknowledgementCountryCode	Text	2	N
215	Designation7AllowReleaseDonorData	Text	1	N
216	Designation7SpecialInstructions	Text	255	N
217	Designation7RecognitionType	Numeric	1	N
218	Designation7RecognitionName	Text	100	N
219	Designation7AcknowledgementName	Text	100	N
220	Designation7AcknowledgementAddress1	Text	100	N
221	Designation7AcknowledgementAddress2	Text	100	N
222	Designation7AcknowledgementCity	Text	50	N
223	Designation7AcknowledgementState	Text	100	N

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224	Designation7AcknowledgementZipCode	Text	50	N
225	Designation7AcknowledgementZipCodeExt	Numeric	4	N
226	Designation7AcknowledgementCountryCode	Text	2	N
227	Designation8AllowReleaseDonorData	Text	1	N
228	Designation8SpecialInstructions	Text	255	N
229	Designation8RecognitionType	Numeric	1	N
230	Designation8RecognitionName	Text	100	N
231	Designation8AcknowledgementName	Text	100	N
232	Designation8AcknowledgementAddress1	Text	100	N
233	Designation8AcknowledgementAddress2	Text	100	N
234	Designation8AcknowledgementCity	Text	50	N
235	Designation8AcknowledgementState	Text	100	N
236	Designation8AcknowledgementZipCode	Text	50	N
237	Designation8AcknowledgementZipCodeExt	Numeric	4	N
238	Designation8AcknowledgementCountryCode	Text	2	N
239	WriteInAgency1AllowReleaseDonorData	Text	1	N
240	WriteInAgency1SpecialInstructions	Text	255	N
241	WriteInAgency1RecognitionType	Numeric	1	N
242	WriteInAgency1RecognitionName	Text	100	N
243	WriteInAgency1AcknowledgementName	Text	100	N
244	WriteInAgency1AcknowledgementAddress1	Text	100	N
245	WriteInAgency1AcknowledgementAddress2	Text	100	N
246	WriteInAgency1AcknowledgementCity	Text	50	N
247	WriteInAgency1AcknowledgementState	Text	100	N
248	WriteInAgency1AcknowledgementZipCode	Text	50	N
249	WriteInAgency1AcknowledgementZipCodeExt	Numeric	4	N
250	WriteInAgency1AcknowledgementCountryCode	Text	2	N
251	WriteInAgency2AllowReleaseDonorData	Text	1	N
252	WriteInAgency2SpecialInstructions	Text	255	N
253	WriteInAgency2RecognitionType	Numeric	1	N
254	WriteInAgency2RecognitionName	Text	100	N
255	WriteInAgency2AcknowledgementName	Text	100	N
256	WriteInAgency2AcknowledgementAddress1	Text	100	N
257	WriteInAgency2AcknowledgementAddress2	Text	100	N
258	WriteInAgency2AcknowledgementCity	Text	50	N
259	WriteInAgency2AcknowledgementState	Text	100	N
260	WriteInAgency2AcknowledgementZipCode	Text	50	N
261	WriteInAgency2AcknowledgementZipCodeExt	Numeric	4	N
262	WriteInAgency2AcknowledgementCountryCode	Text	2	N
263	WriteInAgency3AllowReleaseDonorData	Text	1	N
264	WriteInAgency3SpecialInstructions	Text	255	N
265	WriteInAgency3RecognitionType	Numeric	1	N
266	WriteInAgency3RecognitionName	Text	100	N
267	WriteInAgency3AcknowledgementName	Text	100	N
268	WriteInAgency3AcknowledgementAddress1	Text	100	N

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269	WritelnAgency3AcknowledgementAddress2	Text	100	N
270	WritelnAgency3AcknowledgementCity	Text	50	N
271	WritelnAgency3AcknowledgementState	Text	100	N
272	WritelnAgency3AcknowledgementZipCode	Text	50	N
273	WritelnAgency3AcknowledgementZipCodeExt	Numeric	4	N
274	WritelnAgency3AcknowledgementCountryCode	Text	2	N
275	WritelnAgency4AllowReleaseDonorData	Text	1	N
276	WritelnAgency4SpecialInstructions	Text	255	N
277	WritelnAgency4RecognitionType	Numeric	1	N
278	WritelnAgency4RecognitionName	Text	100	N
279	WritelnAgency4AcknowledgementName	Text	100	N
280	WritelnAgency4AcknowledgementAddress1	Text	100	N
281	WritelnAgency4AcknowledgementAddress2	Text	100	N
282	WritelnAgency4AcknowledgementCity	Text	50	N
283	WritelnAgency4AcknowledgementState	Text	100	N
284	WritelnAgency4AcknowledgementZipCode	Text	50	N
285	WritelnAgency4AcknowledgementZipCodeExt	Numeric	4	N
286	WritelnAgency4AcknowledgementCountryCode	Text	2	N
287	WritelnAgency5AllowReleaseDonorData	Text	1	N
288	WritelnAgency5SpecialInstructions	Text	255	N
289	WritelnAgency5RecognitionType	Numeric	1	N
290	WritelnAgency5RecognitionName	Text	100	N
291	WritelnAgency5AcknowledgementName	Text	100	N
292	WritelnAgency5AcknowledgementAddress1	Text	100	N
293	WritelnAgency5AcknowledgementAddress2	Text	100	N
294	WritelnAgency5AcknowledgementCity	Text	50	N
295	WritelnAgency5AcknowledgementState	Text	100	N
296	WritelnAgency5AcknowledgementZipCode	Text	50	N
297	WritelnAgency5AcknowledgementZipCodeExt	Numeric	4	N
298	WritelnAgency5AcknowledgementCountryCode	Text	2	N
299	WritelnAgency6AllowReleaseDonorData	Text	1	N
300	WritelnAgency6SpecialInstructions	Text	255	N
301	WritelnAgency6RecognitionType	Numeric	1	N
302	WritelnAgency6RecognitionName	Text	100	N
303	WritelnAgency6AcknowledgementName	Text	100	N
304	WritelnAgency6AcknowledgementAddress1	Text	100	N
305	WritelnAgency6AcknowledgementAddress2	Text	100	N
306	WritelnAgency6AcknowledgementCity	Text	50	N
307	WritelnAgency6AcknowledgementState	Text	100	N
308	WritelnAgency6AcknowledgementZipCode	Text	50	N
309	WritelnAgency6AcknowledgementZipCodeExt	Numeric	4	N
310	WritelnAgency6AcknowledgementCountryCode	Text	2	N
311	WritelnAgency7AllowReleaseDonorData	Text	1	N
312	WritelnAgency7SpecialInstructions	Text	255	N
313	WritelnAgency7RecognitionType	Numeric	1	N

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314	WriteInAgency8RecognitionName	Text	100	N
315	WriteInAgency7AcknowledgementName	Text	100	N
316	WriteInAgency7AcknowledgementAddress1	Text	100	N
317	WriteInAgency7AcknowledgementAddress2	Text	100	N
318	WriteInAgency7AcknowledgementCity	Text	50	N
319	WriteInAgency7AcknowledgementState	Text	100	N
320	WriteInAgency7AcknowledgementZipCode	Text	50	N
321	WriteInAgency7AcknowledgementZipCodeExt	Numeric	4	N
322	WriteInAgency7AcknowledgementCountryCode	Text	2	N
323	WriteInAgency8AllowReleaseDonorData	Text	1	N
324	WriteInAgency8SpecialInstructions	Text	255	N
325	WriteInAgency8RecognitionType	Numeric	1	N
326	WriteInAgency8RecognitionName	Text	100	N
327	WriteInAgency8AcknowledgementName	Text	100	N
328	WriteInAgency8AcknowledgementAddress1	Text	100	N
329	WriteInAgency8AcknowledgementAddress2	Text	100	N
330	WriteInAgency8AcknowledgementCity	Text	50	N
331	WriteInAgency8AcknowledgementState	Text	100	N
332	WriteInAgency8AcknowledgementZipCode	Text	50	N
333	WriteInAgency8AcknowledgementZipCodeExt	Numeric	4	N
334	WriteInAgency8AcknowledgementCountryCode	Text	2	N

Valid values for Designation Amount Type are:

- 1 – Dollars
- 2 – Percent

Valid values for Frequency Type are:

- 1 - One-time
- 2 - Monthly
- 3 - Quarterly
- 4 - Semi-annual
- 5 - Per Pay Period

Valid values for Payment Amount Type are:

- 0 - Unselected
- 1 - Dollars
- 2 - PercentOfSalary
- 3 - HoursPerPayPeriod
- 4 – DollarsAdditive
- 5 – DollarsPerPayPeriod
- 6 – DollarsPerDay

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- 7 – CentsPerDay
- 8 – BonusDollars
- 9 – PTOHours
- 10 - DollarsPerMonth

Valid values for IsPaid and IsPaidToUW are:

- Y
- N

*If IsPaidToUW is 'Y' then IsPaid value is required.

Valid values for Allow Release Donor Data are:

- Y
- N

Valid values for Auto Renew are:

- Y
- N

Valid values for Payment Increase Amount Type Code are:

- 1 – Scalar (By the same amount type as the payroll donation)
- 2 - Percent of Salary

Valid values for Recognition Type are:

- 0 - None
- 1 - In Honor Of
- 2 - In Memory Of
- 3 - On Behalf Of

Valid values for Acknowledgement Question Answers are:

- Y
- N

Acknowledgement Question Answers that contain no value will default to 'N'. Answers will be aligned to Acknowledgment Questions as defined by the order of the Acknowledgement Questions.

Valid values for Donation Method are:

- 1 – Total Value
- 2 – Detail

Data Import Format Specification for Batch Donation Direct Bill Import

If Donation Method is Total Value, then Total Stock Value is required.

Expected Transfer Date should follow 'mmddyyyy' format.

If any items within each stock group are provided, Stock Name, Stock Ticker Symbol, Stock Share Count, and Stock Share Value are required.