

## Data Import Format Specification for Batch Donation Credit Card 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              | Y              |
| 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      | Text      | 50             | N              |
| 42      | WriteInAgency2Name              | Text      | 50             | N              |
| 43      | WriteInAgency2EIN               | Numeric   | 9              | N              |

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|    |                                 |         |     |   |
|----|---------------------------------|---------|-----|---|
| 44 | WriteInAgency2DesignationAmount | Numeric | 8   | N |
| 45 | WriteInAgency2Address1          | Text    | 100 | N |
| 46 | WriteInAgency2Address2          | Text    | 100 | N |
| 47 | WriteInAgency2City              | Text    | 50  | N |
| 48 | WriteInAgency2State             | Text    | 200 | N |
| 49 | WriteInAgency2ZipCode           | Text    | 10  | N |
| 50 | WriteInAgency2ZipCodeExt        | Numeric | 4   | N |
| 51 | WriteInAgency2CountryCode       | Text    | 2   | N |
| 52 | WriteInAgency2Contact           | Text    | 100 | N |
| 53 | WriteInAgency2Phone             | Text    | 10  | N |
| 54 | WriteInAgency2EmailAddress      | Text    | 50  | N |
| 55 | WriteInAgency3Name              | Text    | 50  | N |
| 56 | WriteInAgency3EIN               | Numeric | 9   | N |
| 57 | WriteInAgency3DesignationAmount | Numeric | 8   | N |
| 58 | WriteInAgency3Address1          | Text    | 100 | N |
| 59 | WriteInAgency3Address2          | Text    | 100 | N |
| 60 | WriteInAgency3City              | Text    | 50  | N |
| 61 | WriteInAgency3State             | Text    | 200 | N |
| 62 | WriteInAgency3ZipCode           | Text    | 10  | N |
| 63 | WriteInAgency3ZipCodeExt        | Numeric | 4   | N |
| 64 | WriteInAgency3CountryCode       | Text    | 2   | N |
| 65 | WriteInAgency3Contact           | Text    | 100 | N |
| 66 | WriteInAgency3Phone             | Text    | 10  | N |
| 67 | WriteInAgency3EmailAddress      | Text    | 50  | N |
| 68 | WriteInAgency4Name              | Text    | 50  | N |
| 69 | WriteInAgency4EIN               | Numeric | 9   | N |
| 70 | WriteInAgency4DesignationAmount | Numeric | 8   | N |
| 71 | WriteInAgency4Address1          | Text    | 100 | N |
| 72 | WriteInAgency4Address2          | Text    | 100 | N |
| 73 | WriteInAgency4City              | Text    | 50  | N |
| 74 | WriteInAgency4State             | Text    | 200 | N |
| 75 | WriteInAgency4ZipCode           | Text    | 10  | N |
| 76 | WriteInAgency4ZipCodeExt        | Numeric | 4   | N |
| 77 | WriteInAgency4CountryCode       | Text    | 2   | N |
| 78 | WriteInAgency4Contact           | Text    | 100 | N |
| 79 | WriteInAgency4Phone             | Text    | 10  | N |
| 80 | WriteInAgency4EmailAddress      | Text    | 50  | N |
| 81 | WriteInAgency5Name              | Text    | 50  | N |
| 82 | WriteInAgency5EIN               | Numeric | 9   | N |
| 83 | WriteInAgency5DesignationAmount | Numeric | 8   | N |
| 84 | WriteInAgency5Address1          | Text    | 100 | N |
| 85 | WriteInAgency5Address2          | Text    | 100 | N |
| 86 | WriteInAgency5City              | Text    | 50  | N |
| 87 | WriteInAgency5State             | Text    | 200 | N |
| 88 | WriteInAgency5ZipCode           | Text    | 10  | N |

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|     |                                 |         |      |   |
|-----|---------------------------------|---------|------|---|
| 89  | WriteInAgency5ZipCodeExt        | Numeric | 4    | N |
| 90  | WriteInAgency5CountryCode       | Text    | 2    | N |
| 91  | WriteInAgency5Contac            | Text    | 100  | N |
| 92  | WriteInAgency5Phone             | Text    | 10   | N |
| 93  | WriteInAgency5EmailAddress      | Text    | 50   | N |
| 94  | WriteInAgency6Name              | Text    | 50   | N |
| 95  | WriteInAgency6EIN               | Numeric | 9    | N |
| 96  | WriteInAgency6DesignationAmount | Numeric | 8    | N |
| 97  | WriteInAgency6Address1          | Text    | 100  | N |
| 98  | WriteInAgency6Address2          | Text    | 100  | N |
| 99  | WriteInAgency6City              | Text    | 50   | N |
| 100 | WriteInAgency6State             | Text    | 200  | N |
| 101 | WriteInAgency6ZipCode           | Text    | 10   | N |
| 102 | WriteInAgency6ZipCodeExt        | Numeric | 4    | N |
| 103 | WriteInAgency6CountryCode       | Text    | 2    | N |
| 104 | WriteInAgency6Contact           | Text    | 100  | N |
| 105 | WriteInAgency6Phone             | Text    | 10   | N |
| 106 | WriteInAgency6EmailAddress      | Text    | 50   | N |
| 107 | WriteInAgency7Name              | Text    | 50   | N |
| 108 | WriteInAgency7EIN               | Numeric | 9    | N |
| 109 | WriteInAgency7DesignationAmount | Numeric | 8    | N |
| 110 | WriteInAgency7Address1          | Text    | 100  | N |
| 111 | WriteInAgency7Address2          | Text    | 100  | N |
| 112 | WriteInAgency7City              | Text    | 50   | N |
| 113 | WriteInAgency7State             | Text    | 200  | N |
| 114 | WriteInAgency7ZipCode           | Text    | 10   | N |
| 115 | WriteInAgency7ZipCodeExt        | Numeric | 4    | N |
| 116 | WriteInAgency7CountryCode       | Text    | 2    | N |
| 117 | WriteInAgency7Contact           | Text    | 100  | N |
| 118 | WriteInAgency7Phone             | Text    | 10   | N |
| 119 | WriteInAgency7EmailAddress      | Text    | 50   | N |
| 120 | WriteInAgency8Name              | Text    | 50   | N |
| 121 | WriteInAgency8EIN               | Numeric | 9    | N |
| 122 | WriteInAgency8DesignationAmount | Numeric | 8    | N |
| 123 | WriteInAgency8Address1          | Text    | 100  | N |
| 124 | WriteInAgency8Address2          | Text    | 100  | N |
| 125 | WriteInAgency8City              | Text    | 50   | N |
| 126 | WriteInAgency8State             | Text    | 200  | N |
| 127 | WriteInAgency8ZipCode           | Text    | 10   | N |
| 128 | WriteInAgency8ZipCodeExt        | Numeric | 4    | N |
| 129 | WriteInAgency8CountryCode       | Text    | 2    | N |
| 130 | WriteInAgency8Contact           | Text    | 100  | N |
| 131 | WriteInAgency8Phone             | Text    | 10   | N |
| 132 | WriteInAgency8EmailAddress      | Text    | 50   | N |
| 133 | NegativeDesignation             | Text    | 1000 | N |

## Data Import Format Specification for Batch Donation Credit Card Import

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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 |

Valid values Credit Card Type are:

- 1 - Visa
- 2 - Mastercard
- 3 - American Express
- 4 - Discover
- 5 - Diner's Club

Credit Card Number should not contain any spaces or formatting characters.

Credit Card Expiration Date should follow 'mmyy' format.

Billing Start Date should follow 'mmddyyyy' format.

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
- 7 - CentsPerDay
- 8 - BonusDollars

# Data Import Format Specification for Batch Donation Credit Card Import

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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

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

# Data Import Format Specification for Batch Donation Credit Card Import

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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.