

### Data Import Format Specification for Donor Records

Field #	Field Name	Data Type	Maximum Length	Required Field?
1	Donor Identifier	Text	50	Y
2	Username	Text	50	N <sup>1</sup>
3	Password <sup>A</sup>	Text	15	N <sup>1</sup>
4	Prefix	Text	8	N
5	Last Name	Text	50	Y
6	First Name	Text	50	Y
7	Middle Name	Text	50	N
8	Suffix	Text	4	N
9	Nickname	Text	50	N
10	Gender <sup>B</sup>	Text	1	N
11	Employee Number	Text	14	N
12	Social Security Number	Numeric	9	N
13	Home Address Line 1	Text	100	N <sup>2</sup>
14	Home Address Line 2	Text	100	N <sup>2</sup>
15	Home City	Text	50	N <sup>2</sup>
16	Home State/Province	Text/Text	2/200	N <sup>2</sup>
17	Home Zip Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
18	Home Zip Code Ext	Numeric	4	N <sup>2</sup>
19	Home Country	Text	2	N
20	Home Phone	Numeric	15	N <sup>2</sup>
21	Home Email Address	Text	80	N
22	Work Address Line 1	Text	100	N <sup>3</sup>
23	Work Address Line 2	Text	100	N <sup>3</sup>
24	Work City	Text	50	N <sup>3</sup>
25	Work State/Province	Text/Text	2/200	N <sup>3</sup>
26	Work Zip code/Postal Code	Numeric/Text	5/10	N <sup>3</sup>
27	Work Zip code Ext	Numeric	4	N <sup>3</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
28	Work Country	Text	2	N
29	Work Phone	Numeric	15	N <sup>3</sup>
30	Work Email Address	Text	80	N <sup>5</sup>
31	Mailing Address Preference <sup>C</sup>	Text	1	N
32	Annual Salary	Currency	10	N <sup>4</sup>
33	Hourly Pay Rate	Currency	10	N <sup>4</sup>
34	Paid Time Off Rate	Currency	10	N
35	Pay Period Code	Text	10	N <sup>4</sup>
36	Company Level Code	Text	20	N
37	Functional Hierarchy Level Code	Text	20	N
38	Coordinator Hierarchy Level Code	Text	20	N
39	Leadership Recognition Name	Text	65	N
40	Anonymous	Text	1	N
41	Spouse Name	Text	65	N
42	Spouse Employer	Text	65	N
43	Spouse Pledge Amount	Currency	10	N
44	Custom Field 1 Description <sup>D</sup>	Text	50	N
45	Custom Field 1 Value <sup>D</sup>	Text	50	N
46	Custom Field 2 Description <sup>D</sup>	Text	50	N
47	Custom Field 2 Value <sup>D</sup>	Text	50	N
48	Custom Field 3 Description <sup>D</sup>	Text	50	N
49	Custom Field 3 Value <sup>D</sup>	Text	50	N
50	Custom Field 4 Description <sup>D</sup>	Text	50	N
51	Custom Field 4 Value <sup>D</sup>	Text	50	N
52	Custom Field 5 Description <sup>D</sup>	Text	50	N
53	Custom Field 5 Value <sup>D</sup>	Text	50	N
54	Custom Field 6 Description <sup>D</sup>	Text	50	N
55	Custom Field 6 Value <sup>D</sup>	Text	50	N
56	Custom Field 7 Description <sup>D</sup>	Text	50	N

Field #	Field Name	Data Type	Maximum Length	Required Field?
57	Custom Field 7 Value <sup>D</sup>	Text	50	N
58	Custom Field 8 Description <sup>D</sup>	Text	50	N
59	Custom Field 8 Value <sup>D</sup>	Text	50	N
60	Custom Variable 1 <sup>E</sup>	Text	100	N
61	Custom Variable 2 <sup>E</sup>	Text	100	N
62	Custom Variable 3 <sup>E</sup>	Text	100	N
63	Custom Variable 4 <sup>E</sup>	Text	100	N
64	Custom Variable 5 <sup>E</sup>	Text	100	N
65	Custom Variable 6 <sup>E</sup>	Text	100	N
66	Custom Variable 7 <sup>E</sup>	Text	100	N
67	Custom Variable 8 <sup>E</sup>	Text	100	N
68	System Administrator User Name	Text	50	N
69	Coordinator Hierarchy Role Code	Text	20	N
70	Change Password Required At Next Login <sup>F</sup>	Text	1	N
71	Last Year's Total Annual Gift	Currency	10	N
72	Donation Ask Amount	Currency	10	N
73	Donation Edit Type <sup>G</sup>	Numeric	1	N
74	Donation Count Limit <sup>H</sup>	Numeric	2	N
75	Payroll Donation Count Limit <sup>M</sup>	Numeric	2	N
76	Donor Group Name	Text	100	N
77	Coordinator Hierarchy Reporting Code <sup>K</sup>	Text	300	N
78	Coordinator User Name	Text	50	N
79	RegistrationCustomField1Description <sup>J</sup>	Text	100	N
80	RegistrationCustomField1 <sup>J</sup>	Text	50	N
81	RegistrationCustomField2Description <sup>J</sup>	Text	100	N
82	RegistrationCustomField2 <sup>J</sup>	Text	50	N
83	RegistrationCustomField3Description <sup>J</sup>	Text	100	N
84	RegistrationCustomField3 <sup>J</sup>	Text	50	N
85	RegistrationCustomField4Description <sup>J</sup>	Text	100	N

Field #	Field Name	Data Type	Maximum Length	Required Field?
86	RegistrationCustomField4 <sup>J</sup>	Text	50	N
87	RegistrationCustomField5Description <sup>J</sup>	Text	100	N
88	RegistrationCustomField5 <sup>J</sup>	Text	50	N
89	RegistrationCustomField6Description <sup>J</sup>	Text	100	N
90	RegistrationCustomField6 <sup>J</sup>	Text	50	N
91	RegistrationCustomField7Description <sup>J</sup>	Text	100	N
92	RegistrationCustomField7 <sup>J</sup>	Text	50	N
93	RegistrationCustomField8Description <sup>J</sup>	Text	100	N
94	RegistrationCustomField8 <sup>J</sup>	Text	50	N
95	CoordinatorSummaryCode <sup>L</sup>	Text	300	N
96	MatchingGiftCeiling	Currency	10	N
97	Is Active? <sup>N</sup>	Text	1	N

<sup>1</sup> If either username or password is provided both fields are required.

<sup>2</sup> If any of this group is provided, Address 1, City, State/Province, and Zip/Postal Code are required.

<sup>3</sup> If any of this group is provided, Address 1, City, State/Province, and Zip/Postal Code are required.

<sup>4</sup> If Hourly Pay Rate, Annual Salary, or Paid Time Off Rate are provided, Pay Period Code is required. If Hourly Pay Rate is provided, Annual Salary is also required.

<sup>5</sup> All email communication (including donation confirmation emails) are sent to this email address.

<sup>A</sup> Due to security concerns, all passwords must conform to the following:

- Length must be between 6 and 15 characters
- Password must contain at least 1 character from 2 of the following 3 groups:
  1. Alpha (a-z and A-Z)
  2. Numeric (0-9)
  3. Special Characters (" ~ ", " ' ", " # ", " [ ", " ^ ", " & ", " \* ", " ( ", " ) ", " \_ ", " - ", " + ", " = ", " [ ", " ] ", " { ", " } ", " | ", " \ ", " : ", " ; ", " / ", " ? ")

<sup>B</sup> Valid values for Gender are:

- M - male
- F - female
- N – choose not to disclose  
or no value provided

<sup>C</sup> Valid values for Mailing Address Preference are:

- 1 - Home
- 2 - Work

*If no value is provided for Mailing Address Preference, a value of 2 (Work) will be used as a default*

<sup>D</sup> Custom fields contain any values that you would like to "pass through" the system and are included on the "generic export". These values are not visible through the administrative or donor interface.

For users of Rainbow, the custom fields are specifically used to associate and track key donor information as the information moves from Rainbow, to Campaign Management, and back to Rainbow. The fields imported into Campaign Management (through the use of this file specification) will be mapped and included as part of the Rainbow export file as follows:

Data Reference	Rainbow file name	Rainbow field name	donor record import field name	Length
Home Address	IMPADDR	IA_ADKEY	Custom Field 1 Value	10
Home Address	IMPADDR	IA_AEKEY	Custom Field 2 Value	10
Work Address	IMPADDR	IA_ADKEY	Custom Field 3 Value	10
Work Address	IMPADDR	IA_AEKEY	Custom Field 4 Value	10
Home Phone	IMPPHONE	IP_PHKEY	Custom Field 5 Value	10
Work Phone	IMPPHONE	IP_PHKEY	Custom Field 6 Value	10

<sup>E</sup> Custom variables contain any values that you would like to present to the donor during the on-line donation process through the use of the variable replacement feature.

<sup>F</sup> Valid values for Change Password Required At Next Login are:

- Y
- N

*If no value is provided for Change Password Required At Next Login, a value of N (No) will be used as a default*

<sup>G</sup> Valid values for Donation Edit Type are:

- 1 - Never
- 2 - Once
- 3 - Always

*If no value is provided for Donation Edit Type, a value of 1 (Never) will be used as a default*

<sup>H</sup> Valid values for Donation Count Limit are 1 to 99. If this field is left blank the value will default to 1.

<sup>J</sup> Registration custom fields contain any descriptions and default values that you would like to present to the donor during the on-line donation registration process.

<sup>K</sup> Coordinator Hierarchy Reporting Code can contain multiple entries in one field that are pipe delimited. When running a donor update import all existing codes will be replaced by the codes in the import.

<sup>L</sup> Coordinator Summary Code can contain multiple entries in one field that are pipe delimited. When running a donor update import all existing codes will be replaced by the codes in the import.

<sup>M</sup> Valid values for Payroll Donation Count Limit are 1 to 99. If this field is left blank the value will default to 1.

<sup>N</sup> Valid values for Is Active are:

Y

N

*If no value is provided for Is Active, a value of Y (Yes) will be used as a default*

## Other Notes

- The file format is "tab delimited", indicating that all fields should be separated by a tab character.
- Field names may be included as the first row of the file, the first row of the file is optional.
- DO NOT include any formatting characters (for example, \$9.00 should be written as 9.00, social security number 888-88-8888 should be written as 888888888).
- Fields are not required, unless specified in the Required Field column or in the footnotes.
- Donor Identifier must be unique for the specific campaign.
- Username must be unique for the specific campaign.
- Some fields that are listed as not required and not provided will produce some invalid reports or create limitations to the donor during the donation process.