

### Data Import Format Specification for Donation Records

Field #	Field Name	Data Type	Maximum Length	Required Field?
1	Donor Identifier	Text	50	Y
2	Payment Type Code <sup>A</sup>	Numeric	1	Y
3	Donation Import Payment Type Field 1 <sup>B</sup>	B	B	B
4	Donation Import Payment Type Field 2 <sup>B</sup>	B	B	B
5	Donation Import Payment Type Field 3 <sup>B</sup>	B	B	B
6	Donation Import Payment Type Field 4 <sup>B</sup>	B	B	B
7	Donation Import Payment Type Field 5 <sup>B</sup>	B	B	B
8	Donation Import Payment Type Field 6 <sup>B</sup>	B	B	B
9	Donation Import Payment Type Field 7 <sup>B</sup>	B	B	B
10	Donation Import Payment Type Field 8 <sup>B</sup>	B	B	B
11	Donation Import Payment Type Field 9 <sup>B</sup>	B	B	B
12	Donation Import Payment Type Field 10 <sup>B</sup>	B	B	B
13	Donation Import Payment Type Field 11 <sup>B</sup>	B	B	B
14	Donation Import Payment Type Field 12 <sup>B</sup>	B	B	B
15	Donation Import Payment Type Field 13 <sup>B</sup>	B	B	B
16	Donation Import Payment Type Field 14 <sup>B</sup>	B	B	B
17	Donation Import Payment Type Field 15 <sup>B</sup>	B	B	B
18	Donation Import Payment Type Field 16 <sup>B</sup>	B	B	B
19	Donation Import Payment Type Field 17 <sup>B</sup>	B	B	B
20	Donation Import Payment Type Field 18 <sup>B</sup>	B	B	B
21	Donation Import Payment Type Field 19 <sup>B</sup>	B	B	B
22	Donation Import Payment Type Field 20 <sup>B</sup>	B	B	B
23	Donation Import Payment Type Field 21 <sup>B</sup>	B	B	B
24	Donation Import Payment Type Field 22 <sup>B</sup>	B	B	B
25	Donation Import Payment Type Field 23 <sup>B</sup>	B	B	B
26	Donation Import Payment Type Field 24 <sup>B</sup>	B	B	B
27	Donation Import Payment Type Field 25 <sup>B</sup>	B	B	B

Field #	Field Name	Data Type	Maximum Length	Required Field?
28	Donation Import Payment Type Field 26 <sup>B</sup>	B	B	B
29	Donation Import Payment Type Field 27 <sup>B</sup>	B	B	B
30	Donation Import Payment Type Field 28 <sup>B</sup>	B	B	B
31	Donation Import Payment Type Field 29 <sup>B</sup>	B	B	B
32	Donation Import Payment Type Field 30 <sup>B</sup>	B	B	B
33	Donation Import Payment Type Field 31 <sup>B</sup>	B	B	B
34	Donation Import Payment Type Field 32 <sup>B</sup>	B	B	B
35	Designation Amount Type <sup>F</sup>	Text	1	Y
36	Agency 1 Designation Account Number	Text	50	N <sup>1</sup>
37	Agency 1 Designation Amount	Numeric	8	N <sup>1</sup>
38	Agency 2 Designation Account Number	Text	50	N <sup>1</sup>
39	Agency 2 Designation Amount	Numeric	8	N <sup>1</sup>
40	Agency 3 Designation Account Number	Text	50	N <sup>1</sup>
41	Agency 3 Designation Amount	Numeric	8	N <sup>1</sup>
42	Agency 4 Designation Account Number	Text	50	N <sup>1</sup>
43	Agency 4 Designation Amount	Numeric	8	N <sup>1</sup>
44	Agency 5 Designation Account Number	Text	50	N <sup>1</sup>
45	Agency 5 Designation Amount	Numeric	8	N <sup>1</sup>
46	Agency 6 Designation Account Number	Text	50	N <sup>1</sup>
47	Agency 6 Designation Amount	Numeric	8	N <sup>1</sup>
48	Agency 7 Designation Account Number	Text	50	N <sup>1</sup>
49	Agency 7 Designation Amount	Numeric	8	N <sup>1</sup>
50	Agency 8 Designation Account Number	Text	50	N <sup>1</sup>
51	Agency 8 Designation Amount	Numeric	8	N <sup>1</sup>
52	Write-In Agency 1 Name	Text	50	N <sup>2</sup>
53	Write-In Agency 1 EIN	Numeric	9	N <sup>2</sup>
54	Write-In Agency 1 Designation Percentage	Numeric	8	N <sup>2</sup>
55	Write-In Agency 1 Address Line 1	Text	100	N <sup>2</sup>
56	Write-In Agency 1 Address Line 2	Text	100	N <sup>2</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
57	Write-In Agency 1 City	Text	50	N <sup>2</sup>
58	Write-In Agency 1 State/Province	Text/Text	2/200	N <sup>2</sup>
59	Write-In Agency 1 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
60	Write-In Agency 1 ZIP Code Extension	Numeric	4	N <sup>2</sup>
61	Write-In Agency 1 Country	Text	2	N <sup>2</sup>
62	Write-In Agency 1 Contact	Text	100	N <sup>2</sup>
63	Write-In Agency 1 Phone	Text	15	N <sup>2</sup>
64	Write-In Agency 1 Email Address	Text	80	N <sup>2</sup>
65	Write-In Agency 2 Name	Text	50	N <sup>2</sup>
66	Write-In Agency 2 EIN	Numeric	9	N <sup>2</sup>
67	Write-In Agency 2 Designation Percentage	Numeric	8	N <sup>2</sup>
68	Write-In Agency 2 Address Line 1	Text	100	N <sup>2</sup>
69	Write-In Agency 2 Address Line 2	Text	100	N <sup>2</sup>
70	Write-In Agency 2 City	Text	50	N <sup>2</sup>
71	Write-In Agency 2 State/Province	Text/Text	2/200	N <sup>2</sup>
72	Write-In Agency 2 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
73	Write-In Agency 2 ZIP Code Extension	Numeric	4	N <sup>2</sup>
74	Write-In Agency 2 Country	Text	2	N <sup>2</sup>
75	Write-In Agency 2 Contact	Text	100	N <sup>2</sup>
76	Write-In Agency 2 Phone	Text	15	N <sup>2</sup>
77	Write-In Agency 2 Email Address	Text	80	N <sup>2</sup>
78	Write-In Agency 3 Name	Text	50	N <sup>2</sup>
79	Write-In Agency 3 EIN	Numeric	9	N <sup>2</sup>
80	Write-In Agency 3 Designation Percentage	Numeric	8	N <sup>2</sup>
81	Write-In Agency 3 Address Line 1	Text	100	N <sup>2</sup>
82	Write-In Agency 3 Address Line 2	Text	100	N <sup>2</sup>
83	Write-In Agency 3 City	Text	50	N <sup>2</sup>
84	Write-In Agency 3 State/Province	Text/Text	2/200	N <sup>2</sup>
85	Write-In Agency 3 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
86	Write-In Agency 3 ZIP Code Extension	Numeric	4	N <sup>2</sup>
87	Write-In Agency 3 Country	Text	2	N <sup>2</sup>
88	Write-In Agency 3 Contact	Text	100	N <sup>2</sup>
89	Write-In Agency 3 Phone	Text	15	N <sup>2</sup>
90	Write-In Agency 3 Email Address	Text	80	N <sup>2</sup>
91	Write-In Agency 4 Name	Text	50	N <sup>2</sup>
92	Write-In Agency 4 EIN	Numeric	9	N <sup>2</sup>
93	Write-In Agency 4 Designation Percentage	Numeric	8	N <sup>2</sup>
94	Write-In Agency 4 Address Line 1	Text	100	N <sup>2</sup>
95	Write-In Agency 4 Address Line 2	Text	100	N <sup>2</sup>
96	Write-In Agency 4 City	Text	50	N <sup>2</sup>
97	Write-In Agency 4 State/Province	Text/Text	2/200	N <sup>2</sup>
98	Write-In Agency 4 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
99	Write-In Agency 4 ZIP Code Extension	Numeric	4	N <sup>2</sup>
100	Write-In Agency 1 Country	Text	2	N <sup>2</sup>
101	Write-In Agency 4 Contact	Text	100	N <sup>2</sup>
102	Write-In Agency 4 Phone	Text	15	N <sup>2</sup>
103	Write-In Agency 4 Email Address	Text	80	N <sup>2</sup>
104	Write-In Agency 5 Name	Text	50	N <sup>2</sup>
105	Write-In Agency 5 EIN	Numeric	9	N <sup>2</sup>
106	Write-In Agency 5 Designation Percentage	Numeric	8	N <sup>2</sup>
107	Write-In Agency 5 Address Line 1	Text	100	N <sup>2</sup>
108	Write-In Agency 5 Address Line 2	Text	100	N <sup>2</sup>
109	Write-In Agency 5 City	Text	50	N <sup>2</sup>
110	Write-In Agency 5 State/Province	Text/Text	2/200	N <sup>2</sup>
111	Write-In Agency 5 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
112	Write-In Agency 5 ZIP Code Extension	Numeric	4	N <sup>2</sup>
113	Write-In Agency 5 Country	Text	2	N <sup>2</sup>
114	Write-In Agency 5 Contact	Text	100	N <sup>2</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
115	Write-In Agency 5 Phone	Text	15	N <sup>2</sup>
116	Write-In Agency 5 Email Address	Text	80	N <sup>2</sup>
117	Write-In Agency 6 Name	Text	50	N <sup>2</sup>
118	Write-In Agency 6 EIN	Numeric	9	N <sup>2</sup>
119	Write-In Agency 6 Designation Percentage	Numeric	8	N <sup>2</sup>
120	Write-In Agency 6 Address Line 1	Text	100	N <sup>2</sup>
121	Write-In Agency 6 Address Line 2	Text	100	N <sup>2</sup>
122	Write-In Agency 6 City	Text	50	N <sup>2</sup>
123	Write-In Agency 6 State/Province	Text/Text	2/200	N <sup>2</sup>
124	Write-In Agency 6 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
125	Write-In Agency 6 ZIP Code Extension	Numeric	4	N <sup>2</sup>
126	Write-In Agency 6 Country	Text	2	N <sup>2</sup>
127	Write-In Agency 6 Contact	Text	100	N <sup>2</sup>
128	Write-In Agency 6 Phone	Text	15	N <sup>2</sup>
129	Write-In Agency 6 Email Address	Text	80	N <sup>2</sup>
130	Write-In Agency 7 Name	Text	50	N <sup>2</sup>
131	Write-In Agency 7 EIN	Numeric	9	N <sup>2</sup>
132	Write-In Agency 7 Designation Percentage	Numeric	8	N <sup>2</sup>
133	Write-In Agency 7 Address Line 1	Text	100	N <sup>2</sup>
134	Write-In Agency 7 Address Line 2	Text	100	N <sup>2</sup>
135	Write-In Agency 7 City	Text	50	N <sup>2</sup>
136	Write-In Agency 7 State/Province	Text/Text	2/200	N <sup>2</sup>
137	Write-In Agency 7 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
138	Write-In Agency 7 ZIP Code Extension	Numeric	4	N <sup>2</sup>
139	Write-In Agency 7 Country	Text	2	N <sup>2</sup>
140	Write-In Agency 7 Contact	Text	100	N <sup>2</sup>
141	Write-In Agency 7 Phone	Text	15	N <sup>2</sup>
142	Write-In Agency 7 Email Address	Text	80	N <sup>2</sup>
143	Write-In Agency 8 Name	Text	50	N <sup>2</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
144	Write-In Agency 8 EIN	Numeric	9	N <sup>2</sup>
145	Write-In Agency 8 Designation Percentage	Numeric	8	N <sup>2</sup>
146	Write-In Agency 8 Address Line 1	Text	100	N <sup>2</sup>
147	Write-In Agency 8 Address Line 2	Text	100	N <sup>2</sup>
148	Write-In Agency 8 City	Text	50	N <sup>2</sup>
149	Write-In Agency 8 State/Province	Text/Text	2/200	N <sup>2</sup>
150	Write-In Agency 8 ZIP Code/Postal Code	Numeric/Text	5/10	N <sup>2</sup>
151	Write-In Agency 8 ZIP Code Extension	Numeric	4	N <sup>2</sup>
152	Write-In Agency 8 Country	Text	2	N <sup>2</sup>
153	Write-In Agency 8 Contact	Text	100	N <sup>2</sup>
154	Write-In Agency 8 Phone	Text	15	N <sup>2</sup>
155	Write-In Agency 8 Email Address	Text	80	N <sup>2</sup>
156	Negative Designation	Text	1000	N
157	Acknowledgement Question 1 Answer <sup>C</sup>	Text	1	N
158	Acknowledgement Question 2 Answer <sup>C</sup>	Text	1	N
159	Acknowledgement Question 3 Answer <sup>C</sup>	Text	1	N
160	Acknowledgement Question 4 Answer <sup>C</sup>	Text	1	N
161	Acknowledgement Question 5 Answer <sup>C</sup>	Text	1	N
162	Acknowledgement Question 6 Answer <sup>C</sup>	Text	1	N
163	Acknowledgement Question 7 Answer <sup>C</sup>	Text	1	N
164	Auto Renew <sup>D</sup>	Text	1	N
165	Payment Increase Amount	Currency	10	N
166	Payment Increase Amount Type Code <sup>E</sup>	Numeric	1	N
167	Confirmed <sup>G</sup>	Text	1	N
168	Date Created Override <sup>H</sup>	Date	8	N
169	Agency 1 Special Instructions	Text	255	N <sup>1</sup>
170	Agency 2 Special Instructions	Text	255	N <sup>1</sup>
171	Agency 3 Special Instructions	Text	255	N <sup>1</sup>
172	Agency 4 Special Instructions	Text	255	N <sup>1</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
173	Agency 5 Special Instructions	Text	255	N <sup>1</sup>
174	Agency 6 Special Instructions	Text	255	N <sup>1</sup>
175	Agency 7 Special Instructions	Text	255	N <sup>1</sup>
176	Agency 8 Special Instructions	Text	255	N <sup>1</sup>
177	Write-In Agency 1 Special Instructions	Text	255	N <sup>2</sup>
178	Write-In Agency 2 Special Instructions	Text	255	N <sup>2</sup>
179	Write-In Agency 3 Special Instructions	Text	255	N <sup>2</sup>
180	Write-In Agency 4 Special Instructions	Text	255	N <sup>2</sup>
181	Write-In Agency 5 Special Instructions	Text	255	N <sup>2</sup>
182	Write-In Agency 6 Special Instructions	Text	255	N <sup>2</sup>
183	Write-In Agency 7 Special Instructions	Text	255	N <sup>2</sup>
184	Write-In Agency 8 Special Instructions	Text	255	N <sup>2</sup>

<sup>A</sup> Values for PaymentTypeCode include:

- 1 – Payroll Deduction
- 2 – Credit Card
- 3 – Debit Card
- 4 – ACH (Electronic Check)
- 5 – Cash
- 6 – Check
- 7 – Direct Bill
- 8 – Stock
- 9 – No Donation

<sup>B</sup> Values for Donation Import Payment Type Fields 1 through 32 refer to Specific payment Type Specification

- Payroll Deduction
- Credit Card
- Debit Card
- ACH (Electronic Check)
- Cash
- Check
- Direct Bill
- Stock
- No Donation

<sup>C</sup> 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.*

<sup>D</sup> Valid values for Auto Renew are:

Y  
N

<sup>E</sup> Valid values for Payment Increase Amount Type Code are:

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

<sup>F</sup> Valid values for Designation Amount Type are:

1 – Dollars  
2 – Percent

<sup>G</sup> Valid values for Confirmed are:

Y  
N (Default)

<sup>H</sup> Date Created Override should follow 'mmddyyyy' format.

<sup>1</sup> If any items within each agency group are provided, Agency Designation Account Number and Designation Percentage are required.

<sup>2</sup> If any items within each write-in agency group are provided, Write-In Agency Name and Write-In Agency Designation Percentage are required.

## **Other Notes**

- All donor identifiers MUST have a corresponding donor record in the system.
- The total designated amount must equal the total value of the gift.
- The total count of designated agencies (including write-in agencies) must be equal to or less than allowed by the option set settings or 8, whichever is less.
- 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, (999)555-1212 should be written as 9995551212).
- Fields are not required, unless specified in the Required Field column or in the footnotes.



**Data Import Format Specification for  
Payment Type Fields for Payroll Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Donation Amount Type <sup>A</sup>	Numeric	1	Y
5	Frequency Type <sup>B</sup>	Numeric	1	Y

<sup>A</sup> Valid values for Donation Amount Type are:

- 1 - Dollars
- 2 - Percent of Salary
- 3 - Hours / Pay Cycle
- 4 - Dollars - Additive
- 5 - Dollars / Pay Cycle
- 6 - Dollar / Day
- 7 - Cents / Day
- 8 - Bonus dollars
- 9 - PTO hours

<sup>B</sup> Valid values for Frequency Type are:

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

**Other Notes**

- All donors MUST have a corresponding donor record in the system that will allow the total amount of the donation to be calculated (Salary and/or Hourly rate provided).

**Data Import Format Specification for  
Payment Type Fields for Credit Card Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Frequency Type <sup>A</sup>	Numeric	1	Y
5	Blank <sup>B</sup>	Numeric	1	Y
6	Blank	Text	50	Y
7	Blank <sup>C</sup>	Text	16	Y
8	Blank <sup>D</sup>	Text	50	Y
9	Billing Start Date <sup>E</sup>	Date	8	Y
10	Billing Address Line 1	Text	100	Y <sup>1</sup>
11	Billing Address Line 2	Text	100	N <sup>1</sup>
12	Billing Address City	Text	50	Y <sup>1</sup>
13	Billing Address State/Province	Text/Text	2/200	Y <sup>1</sup>
14	Billing Address Zip Code/Postal Code	Numeric/Text	5/10	Y <sup>1</sup>
15	Billing Address Zip Code Extension	Numeric	4	N <sup>1</sup>
16	Billing Address Country	Text	2	Y <sup>1</sup>
17	Email Address	Text	80	Y <sup>1</sup>

<sup>A</sup> Valid values for Frequency Type are:

- 1 – One-time
- 2 – Monthly
- 3 – Quarterly
- 4 – Semi-annual

<sup>B</sup> Valid values Credit Card Type are:

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

<sup>C</sup> Credit Card Number should not contain any spaces or formatting characters.

<sup>D</sup> Credit Card Expiration Date should follow ‘mmyy’ format.

<sup>E</sup> Billing Start Date should follow ‘mmddyyyy’ format.

<sup>1</sup> The following fields are required, Billing Address Line 1, Billing Address City, Billing Address State/Province, Billing Address Zip Code/Postal Code, Billing Address Country and Email Address are required.

**Data Import Format Specification for  
Payment Type Fields for Debit Card Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Frequency Type <sup>A</sup>	Numeric	1	Y
5	Blank	Text	50	Y
6	Blank	Text	50	Y
7	Blank <sup>B</sup>	Text	50	Y
8	Blank <sup>C</sup>	Text	50	Y
9	Billing Start Date <sup>D</sup>	Date	8	Y
10	Billing Address Line 1	Text	100	Y <sup>1</sup>
11	Billing Address Line 2	Text	100	N <sup>1</sup>
12	Billing Address City	Text	50	Y <sup>1</sup>
13	Billing Address State/Province	Text/Text	2/200	Y <sup>1</sup>
14	Billing Address Zip Code/Postal Code	Numeric/Text	5/10	Y <sup>1</sup>
15	Billing Address Zip Code Extension	Numeric	4	N <sup>1</sup>
16	Billing Address Country	Text	2	Y <sup>1</sup>
17	Email Address	Text	80	Y <sup>1</sup>

<sup>A</sup> Valid values for Frequency Type are:

- 1 – One-time
- 2 – Monthly
- 3 – Quarterly
- 4 – Semi-annual

<sup>B</sup> Debit Card Number should not contain any spaces or formatting characters.

<sup>C</sup> Debit Card Expiration Date should follow 'mmyy' format.

<sup>D</sup> Billing Start Date should follow 'mmddyyyy' format.

<sup>1</sup> The following fields are required, Billing Address Line 1, Billing Address City, Billing Address State/Province, Billing Address Zip Code/Postal Code, Billing Address Country and Email Address are required.

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**Data Import Format Specification for  
Payment Type Fields for Electronic Check Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Frequency Type <sup>A</sup>	Numeric	1	Y
5	Blank	Numeric	10	Y
6	Blank	Text	50	Y
7	Blank	Text	50	Y
8	Blank	Numeric	9	Y
9	Blank	Numeric	50	Y
10	Blank <sup>B</sup>	Date	8	N
11	Billing Address Line 1	Text	100	Y <sup>1</sup>
12	Billing Address Line 2	Text	100	N <sup>1</sup>
13	Billing Address City	Text	50	Y <sup>1</sup>
14	Billing Address State/Province	Text/Text	2/200	Y <sup>1</sup>
15	Billing Address Zip Code/Postal Code	Numeric/Text	5/10	Y <sup>1</sup>
16	Billing Address Zip Code Extension	Numeric	4	N <sup>1</sup>
17	Billing Address Country	Text	2	Y <sup>1</sup>
18	Email Address	Text	80	Y <sup>1</sup>
19	Phone	Numeric	15	Y <sup>1</sup>
20	Drivers License Number	Text	25	Y <sup>1</sup>
21	Drivers License State	Text	2	Y <sup>1</sup>

<sup>A</sup> Valid values for Frequency Type are:

- 1 – One-time
- 2 – Monthly

<sup>B</sup> Billing Start Date should follow 'mmddyyyy' format.

<sup>1</sup> The following fields are required, Billing Address Line 1, Billing Address City, Billing Address State/Province, Billing Address Zip Code/Postal Code, Billing Address Country, Email Address, Phone, Drivers License Number and Drivers License State are required.

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**Data Import Format Specification for  
Payment Type Fields for Cash Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Is Paid	Text	1	N

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**Data Import Format Specification for  
Payment Type Fields for Check Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Check Number	Text	10	N
5	Is Paid	Text	1	N

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**Data Import Format Specification for  
Payment Type Fields for Direct Bill Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Amount	Currency	10	Y
4	Frequency Type <sup>A</sup>	Numeric	1	Y
5	Billing Start Date <sup>B</sup>	Date	8	N
6	Billing Address Line 1	Text	100	Y <sup>1</sup>
7	Billing Address Line 2	Text	100	N <sup>1</sup>
8	Billing Address City	Text	50	Y <sup>1</sup>
9	Billing Address State/Province	Text/Text	2/200	Y <sup>1</sup>
10	Billing Address Zip Code/Postal Code	Numeric/Text	5/10	Y <sup>1</sup>
11	Billing Address Zip Code Extension	Numeric	4	N <sup>1</sup>
12	Billing Address Country	Text	2	Y <sup>1</sup>

<sup>A</sup> Valid values for Frequency Type are:

- 1 – One-time
- 2 – Monthly
- 3 – Quarterly
- 4 – Semi-annual

<sup>B</sup> Billing Start Date should follow 'mmddyyyy' format.

<sup>1</sup> The following fields are required, Billing Address Line 1, Billing Address City, Billing Address State/Province, Billing Address Country and Billing Address Zip Code/Postal Code are required.

**Data Import Format Specification for  
Payment Type Fields for Stock Donation Records**

<b>Payment Type Field #</b>	<b>Field Name</b>	<b>Data Type</b>	<b>Maximum Length</b>	<b>Required Field?</b>
3	Donation Method <sup>A</sup>	Numeric	1	Y
4	Total Stock Value	Currency	10	N <sup>1</sup>
5	Stock 1 Name	Text	50	Y <sup>2</sup>
6	Stock 1 Ticker Symbol	Text	4	Y <sup>2</sup>
7	Stock 1 Share Count	Numeric	10	Y <sup>2</sup>
8	Stock 1 Share Value	Currency	10	Y <sup>2</sup>
9	Stock 1 Expected Transfer Date <sup>B</sup>	Date	8	N <sup>2</sup>
10	Stock 1 Broker Name	Text	50	N <sup>2</sup>
11	Stock 2 Name	Text	50	N <sup>2</sup>
12	Stock 2 Ticker Symbol	Text	10	N <sup>2</sup>
13	Stock 2 Share Count	Numeric	10	N <sup>2</sup>
14	Stock 2 Share Value	Currency	10	N <sup>2</sup>
15	Stock 2 Expected Transfer Date <sup>B</sup>	Date	8	N <sup>2</sup>
16	Stock 2 Broker Name	Text	50	N <sup>2</sup>
17	Stock 3 Name	Text	50	N <sup>2</sup>
18	Stock 3 Ticker Symbol	Text	10	N <sup>2</sup>
19	Stock 3 Share Count	Numeric	10	N <sup>2</sup>
20	Stock 3 Share Value	Currency	10	N <sup>2</sup>
21	Stock 3 Expected Transfer Date <sup>B</sup>	Date	8	N <sup>2</sup>
22	Stock 3 Broker Name	Text	50	N <sup>2</sup>
23	Stock 4 Stock Name	Text	50	N <sup>2</sup>
24	Stock 4 Ticker Symbol	Text	10	N <sup>2</sup>
25	Stock 4 Share Count	Numeric	10	N <sup>2</sup>
26	Stock 4 Share Value	Currency	10	N <sup>2</sup>

Payment Type Field #	Field Name	Data Type	Maximum Length	Required Field?
27	Stock 4 Expected Transfer Date <sup>B</sup>	Date	8	N <sup>2</sup>
28	Stock 4 Broker Name	Text	50	N <sup>2</sup>
29	Stock 5 Stock Name	Text	50	N <sup>2</sup>
30	Stock 5 Ticker Symbol	Text	10	N <sup>2</sup>
31	Stock 5 Share Count	Numeric	10	N <sup>2</sup>
32	Stock 5 Share Value	Currency	10	N <sup>2</sup>
33	Stock 5 Expected Transfer Date <sup>B</sup>	Date	8	N <sup>2</sup>
34	Stock 5 Broker Name	Text	50	N <sup>2</sup>

<sup>A</sup> Valid values for Donation Method are:

- 1 – Total Value
- 2 – Detail

<sup>B</sup> Expected Transfer Date should follow 'mmddyyyy' format.

<sup>1</sup> If Donation Method is Total Value, then Total Stock Value is required.

<sup>2</sup> If any items within each stock group are provided, Stock Name, Stock Ticker Symbol, Stock Share Count, and Stock Share Value are required.