# **Funders Template**

# **REQUIRED COLUMNS**

* + - Funder Name
	+ OPTIONAL COLUMNS
		- Description - character limit 10000
		- Areas of Interest - character limit 10000
		- Funder Categories - multiple categories must be separated by a “|”. The character limit on a category is 200 characters. Do not include any commas in the categories column.
		- Min Funding Range - must be a number (Sometimes excel will automatically add currency formatting. When this happens reformat the column as text.)
		- Max Funding Range - must be a number
		- Funder Type - values must match the following
			* Corporation
			* Donor Advised
			* Foundation
			* Government
			* Individual
			* Other
		- Website - must be a url
		- Custom link - must be a url
		- Funder Email - must be email format
		- Funder Phone
		- Funder Fax
		- Facebook - must be a url
		- Twitter - must be a url
		- LinkedIn - must be a url
		- Instagram - must be a url
		- Street 1
		- Street 2
		- Street 3
		- City
		- State
		- Postal Code
		- Country Code
		- Created Date - must be a date

**Contact Template**

* + **REQUIRED COLUMNS**
		- Funder Name - the funder must already exist on the Funder template
		- Contact First Name
		- Contact Last Name
	+ OPTIONAL COLUMNS
		- Contact Prefix
		- Contact Suffix
		- Contact Title
		- Contact Email - must be an email address
		- Contact Phone
		- Contact Fax
		- Street 1
		- Street 2
		- Street 3
		- City
		- State
		- Postal Code

# **Opportunities**

# **REQUIRED COLUMNS**

* + - Funder Name - the funder must already exist in the Funder template
		- Opportunity Name - the name must be unique within the funder
		- Proposal Deadline - must be a date
		- Amount Requested - must be a number. If there is no value it will default to $0.00 but will not prevent import.
		- Status - must match the following
			* Research
			* Planned
			* In-Progress
			* LOI-Submitted
			* LOI-Draft
			* Application-Submitted
			* Awarded
			* Awarded-Closed
			* Denied
			* Withdrawn
			* Abandoned
		- *Amount Awarded - \*Only required for opportunities with an awarded status, must be a number. If there is no value it will default to $0.00 but will not prevent import.*
		- *Decision Date - \*Only required for opportunities with an awarded or denied status, must be a date*
		- Owner - The owner email must match the email of an existing user
	+ OPTIONAL COLUMNS
		- Description - character limit 10000
		- Funding Type - must match the following
			* Capital Campaign Support
			* General Operating Support
			* Program Funds
			* Sponsorships
			* Other
		- Award ID
		- Date Submitted - must be a date
		- Funder Notification Date - must be a date
		- Award Details
		- Amount Expected - must be a number
		- Is Rolling Deadline - Use Yes/No or TRUE/FALSE other values will cause an error.
		- Award Term Start Date - must be a date
		- Award Term End Date - must be a date
		- Primary Contact - must already exist for the funder
		- Application Type - must match the following
			* Email
			* Online
			* Paper
			* Other
		- Categories - multiple categories must be separated by a “|”. The character limit on a category is 200 characters. Do not include any commas in the categories column.
		- Custom Reminder Lead Days - must be an integer
		- Created Date - must be a date