# **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      * Withdrawn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