

**\* Required Fields**

Contact Field	<b>Account ID (Contact ID)</b>	→	If your previous system has an ID present, you will want to include it here to help reduce duplicates. We will import it as the External ID.
Contact Field	<b>Contact Type</b>	→	Is your contact an Individual or an Organization? i.e. John Smith versus Smith Foundation.
Donation Field	<b>Donation Date*</b>	→	All donations require an individual donation date MM/DD/YYYY. If this is missing, it may slow your import. Don't know the exact date? You can always assign January 1st of the respective year.
Donation Field	<b>Donation Amount*</b>	→	What is the amount of the donation?
Donation Field	<b>Payment Method*</b>	→	How did the donor pay for the donation? If you're unsure, we will place Other into the field.
Donation Field	<b>Fair Market Value</b>	→	Is there an amount of the donation that is not tax-deductible? If so you can use this to detail that, i.e. Ticket Price \$100 with \$50 of it covering food.
Donation Field	<b>Campaign</b>	→	How did you raise the donation? This is typically something such as Giving Tuesday, Year-End Campaign, Spring Gala.
Donation Field	<b>Designation</b>	→	Often called Fund in other system, this is where the donor has designated the funds to go. i.e. Building Fund, Child Sponsorship, etc...
Contact Field	<b>Full Name*</b>	→	When adding a contact, you'll see the only required field is Full Name. Donor management then breaks the name down into Prefix, First, Middle, Last Names, and Suffix. Always make sure you have at least the First Name for every contact.
Contact Field	<b>Email</b>	→	While email is not required, we do recommend putting an email on all of your contacts as it will aid you in communicating with your contacts and donors.
Contact Field	<b>Receive Emails?</b>	→	This lets donor management know if the contact is subscribed to your emails. Simply put a Yes or No value for each contact
Contact Field	<b>Mobile Phone</b>	→	This is the primary phone number for your contacts. If you're unsure if the number is mobile, put it in this field so you can test it out with the Text Messages feature.
Contact Field	<b>Gender</b>	→	Helps you understand your contact's demographics.
Contact Field	<b>Date of Birth</b>	→	Allows you to track your contact and donor's birthdays. Sending a birthday note is a great way to keep them engaged with your organization.
Contact Field	<b>Home Phone</b>	→	One of the multiple phone fields this will be their home phone, not used in the Text Message feature.
Contact Field	<b>Formal Greeting</b>	→	This allows you to assign a formal greeting to your contact, and it is used as a Merge Field when sending out a communication. i.e. Mr. and Mrs. Smith
Contact Field	<b>Informal Greeting</b>	→	This allows you to assign an informal greeting to your contact, and it can be used as a Merge Field when sending out a communication. i.e. Arlene and Jack
Contact Field	<b>Household Name</b>	→	This field is important when you have multiple contacts in a household, and it allows you to specify what you would like their household called. This is particularly important for mailing labels when using the Direct Mail feature.
Contact Field	<b>Home Address</b>	→	This is the contact's full home address.
Contact Field	<b>Head of Household?</b>	→	Head of household designation applies formal greeting, informal greeting, and household name stored on this contact record to all other contacts that share the same address.
Contact Field	<b>Employer</b>	→	Store the contact's employer as part of their contact information.
Contact Field	<b>Job Title</b>	→	List out the contact's title at their place of employment. Important when you're working on partnering with businesses.
Contact Field	<b>Work Email</b>	→	Allows you to store a secondary email for the contact. Not used for the Email Blast feature.
Contact Field	<b>Work Phone</b>	→	Store the contact's direct work number for outreach.
Contact Field	<b>Work Address</b>	→	Store the contact's work address. Not used for the Direct Mail feature.