

HOW TO SEND DONOR DATA TO FIVE MAPLES FOR ANALYSIS

1. Fields Needed:

Donor ID	Donor Country
Donor Name	Gift Date
Donor Address	Gift Amount
Donor City	Constituent Code (if desired)
Donor State	Payment Type (if desired)
Donor Zip	Fields of Interest (ex. Gender, Class Year, Fund)

2. Date Criteria:

- a. 10 Full Years of Data plus year-to-date. Example: If it's January 31st, 2019 and your Fiscal Year ends 6/30. We would want 7/1/08-1/31/19.

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3. Transaction Type Criteria:

- a. Please provide annual fund gifts only
 - i. This includes online giving, memorial giving, donor advised giving, employee giving, etc.
 - ii. This does **not** include events (like galas or auctions), capital campaigns, or endowment gifts.
- b. Please do **not** include in-kind gifts or unpaid pledges

4. Format:

- a. Please provide in either Excel or CSV format.

5. Upload to Five Maples

- a. Please send your files via the **File Upload Hightail** button on our home page (fivemaples.com) or click [HERE](#) to go direct to Hightail

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Donor ID	Name	Last Name	Address 1	City	ST	Zip	Constituency	Gift Date	Gift Amount	Pay Type	Campaign	Appeal Code	Package Code
44299	John	Doe	1 Main St.	Generous	NH	03400	Alumni	9/1/2014	\$1,000.00	Check	2014 Annual Fund	14AF1	LY
44299	John	Doe	1 Main St.	Generous	NH	03400	Alumni	8/18/2013	\$500.00	Check	2013 Annual Fund	13AF2	SY
44299	John	Doe	1 Main St.	Generous	NH	03400	Alumni	10/7/2014	\$983.00	Stock	2014 Annual Fund		
44299	John	Doe	1 Main St.	Generous	NH	03400	Alumni	1/31/2010	\$500.00	Check	2010 Annual Fund	10AF3	NG
61239	James	Jones	P.O. Box 31	Big Town	MA	02001	Volunteer	6/15/2015	\$25.00	On-Line	2015 Phone-a-Thon		
68627	Jane	Bee	1 Up St.	Small Town	VT	05300	Parent	8/23/2013	\$500.00	Pledge-Check	2013 Annual Fund		
68627	Lois	Lane	P.O. Box 101	Gotham	NY	10001	Parent	8/26/2014	\$200.00	Check	2014 Annual Fund	14AF1	DL
68631	Sally	Fry	1 Down St.	Forward	ME	04900	Employee	10/31/2015	\$25.00	Pledge-Draft	2015 Annual Fund	15AF1	LY
68631	Sally	Fry	1 Down St.	Forward	ME	04900	Employee	11/30/2015	\$25.00	Pledge-Draft	2015 Annual Fund	15AF1	LY
68631	Sally	Fry	1 Down St.	Forward	ME	04900	Employee	12/31/2015	\$25.00	Pledge-Draft	2015 Annual Fund	15AF1	LY
68633	Jim	Smith	1 Next St.	Helpful	MA	02099	Volunteer	7/21/2010	\$21.00	On-Line	2010 Walk		
68633	Jim	Smith	1 Next St.	Helpful	MA	02099	Volunteer	7/22/2011	\$11.00	On-Line	2011 Annual Fund	11AF3	LY