



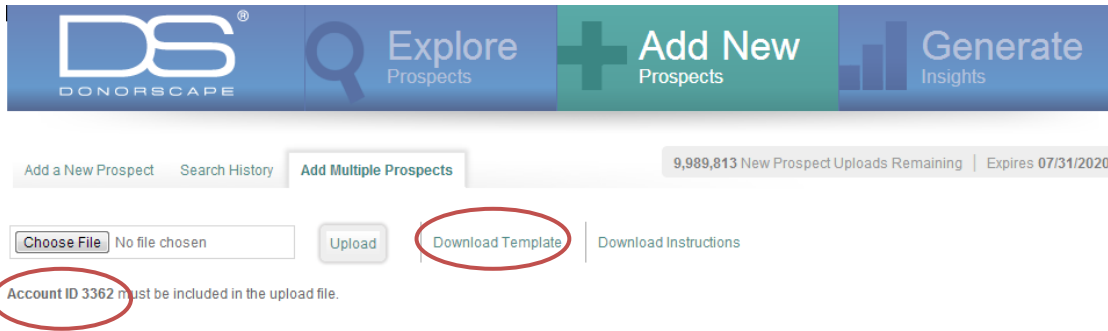
DONORSCAPE® ADD MULTIPLE PROSPECTS

The Add Multiple Prospects feature allows users to upload files of up to 5,000 prospects.

Files larger than 5,000 prospects must be divided into smaller files with 5,000 prospects or less.

Preparing a File for Add Multiple Prospects

Fill out the Add Multiple Prospects template following the tech specifications. These specifications are EXACT. Variations will cause your upload to be rejected. Specifications can be found by hovering over the column headers in the template and are listed below. If you do not see the Add Multiple Prospects subtab available on your screen, contact your Account Administrator to give you access.



- Your Account ID is listed below the **Choose File** section of the Add Multiple Prospects subtab of the Add New Prospects Tab. Every prospect requires a unique ProspectID. Most clients use the ID from their client management system. Required columns have a yellow heading.

	A	B	C	D	E
1	AccountID	ScreeningIndicator	ProspectID	Title	FirstName
2					
3					

- Required columns include:

AccountID	HomeStreetAddress
ProspectID	HomeCity
ScreeningIndicator	HomeState
FirstName	HomeZipCode
LastName	

- The following columns are recommended for better screening results and have a green column heading:

HomeAptUnitSuite	SpouseLast	SeasonalStreetAddress
MiddleName	Employer	SeasonalAptUnitSuite
Age	BusinessStreetAddress	SeasonalCity
DateOfBirth	BusinessAptUnitSuite	SeasonalState

SpouseId	BusinessCity	SeasonalZipCode
SpouseFirst	BusinessState	TotalGivingDollars
SpouseMiddle	BusinessZipCode	ClientDefinedField_20

- All other columns are optional and may be deleted if unused.
- Save the file in a comma delimited format (.CSV or .TXT) beginning with your Account ID (Ex: 1001_JanuaryUploads.csv or 1001_JanuaryUploads.txt)
- Once your Add Multiple Prospects file has been created according to the format specifications, use the **Choose File** button to locate the file on your computer. Once the desired file has been selected, click the **Upload** button to initiate the upload process.
- The system will immediately process your file through a data validity filter to ensure all the necessary fields and formatting is present. Once all prospect records pass the validity test, they will be matched and loaded into your constituent list.
- If validity errors exist, the word 'Yes' will appear in the validity error column. If the 'Validity Error' field contains a 'Yes' value, clicking on the 'Yes' will populate the Errors table below with the appropriate errors in your file. An 'In Progress' value signifies all records are being processed correctly. Once all validity errors have been corrected, the file can immediately be uploaded again through the Add Multiple Prospects feature.
- You will receive an email once the upload is complete.

Add Multiple Prospects Tips

- The second street address lines are reserved for apartment, suite, or unit numbers. To increase the likelihood of an address match, include the number and the apartment, suite or unit prefix (e.g. 'Suite 100' rather than '100').
- Limit your employer entries to commonly used company names and avoid entering extraneous information. 'ABC Corporation' stands a much better chance of matching to the vendor databases than 'ABC Corporation-California/R&D Division'.
- Use ClientDefinedField_20 as a batch file indicator (i.e. "Parents2010", "Upload 1-2009", etc.). This allows the user to isolate the file records in a query after screening.

Finding Uploaded Records in DonorScape

- To isolate all records added in a specific date range, select the beginning and ending dates under Date Uploaded feature on the Simple Search function

The screenshot shows the DonorScape search interface with three main filter sections:

- General Information:** Includes fields for Prospect ID, First Name, Last Name, Age (range: None - 120), Date Uploaded (range: mm/dd/yyyy to mm/dd/yyyy), and Last Updated (range: mm/dd/yyyy to mm/dd/yyyy). The Date Uploaded field is circled in red.
- Wealth Information:** Includes Gift Capacity Rating (range: None - 1), Major Gift Code (range: None - A), Annual Giving Code (range: None - 1), Planned Giving Code (range: None - P), Philanthropic Capacity Rating (range: None - P1), and PRIZM Cluster Code (Please select).
- Location Information:** Includes City, State(s) (Please select), Zip Code(s) (Enter zip codes with commas), and MSA(s) (Please select).

- To isolate a specific file by a Client Defined Field (such as Client Field 20 suggested above), records added in a specific date range, select Constituent Information then the Client Defined Field under the Advanced Search function.

The screenshot shows the DonorScape search interface with the Advanced Search function selected. The search criteria are as follows:

- Constituent Information:** Select Field
- Select Category:** Client Field 006, Client Field 007, Client Field 008, Client Field 009, Client Field 010, Client Field 011, Client Field 012, Client Field 013, Client Field 014, Client Field 015, Client Field 016, Client Field 017, Client Field 018, Client Field 019, Client Field 020
- Select Operator:** ?
- Enter Value:** Enter Value
- Clear:** Clear

There are multiple rows of the same search criteria, and a "Clear All" button is visible at the bottom right.

For more information: Consult DonorScape Online Support Resources or contact support@donorscape.com

ADD MULTIPLE PROSPECTS FILE FORMAT REFERENCE

*Indicates Required Field

Name	Type	Character Limit	Requirements
*AccountID	Text	4	Cannot be NULL. Must equal your assigned AccountID from GG&A for each record in your file - invalid or NULL AccountID's will be rejected
*ScreeningIndicator	Text	1	Must be 'Y'
*ProspectID	Text	32	Cannot be NULL. Each record must have a unique ProspectID. Cannot exceed 32 characters in length
Title	Text	25	Cannot exceed 25 characters
*FirstName	Text	30	Cannot be NULL. Insert NOT PROVIDED if unavailable. No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 30 characters
MiddleName	Text	30	Cannot exceed 30 characters
*LastName	Text	50	Cannot be NULL. Insert NOT PROVIDED if unavailable. No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 50 characters
Suffix	Text	15	No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 15 characters
*HomeStreetAddress	Text	100	Cannot be NULL. Insert NOT PROVIDED if unavailable. Cannot exceed 100 characters - do not put apartment, unit, suite, cottage, etc. information on this line
HomeAptUnitSuite	Text	75	Cannot exceed 75 characters - put apartment, unit, suite, cottage etc. information on this line
*HomeCity	Text	31	Cannot be NULL. Insert NOT PROVIDED if unavailable. Cannot exceed 31 characters - numbers are not allowed.
*HomeState	Text	2	Cannot be NULL. Insert XX if unavailable. Cannot exceed 2 characters
*HomeZipCode	Text	5	Cannot be NULL. Insert 99999 if unavailable. First five digits only. Cannot contain dash separators
HomePhone	Text	25	Cannot exceed 25 characters
Employer	Text	150	Cannot exceed 150 characters
JobTitle	Text	75	Cannot exceed 75 characters
BusinessStreetAddress	Text	100	Cannot exceed 100 characters – do not put apartment, unit, suite, cottage etc. information on this line
BusinessAptUnitSuite	Text	75	Cannot exceed 75 characters - put apartment, unit, suite, cottage etc. information on this line
BusinessCity	Text	31	Cannot exceed 31 characters - numbers are not allowed
BusinessState	Text	2	Cannot exceed 2 characters
BusinessZipCode	Text	5	First five digits only. Cannot contain dash separators
BusinessPhone	Text	25	Cannot exceed 25 characters
SeasonalStreetAddress	Text	100	Cannot exceed 100 characters – do not put apartment, unit, suite, cottage etc. information on this line

SeasonalAptUnitSuite	Text	100	Cannot exceed 100 characters - put apartment, unit, suite, cottage etc. information on this line
SeasonalCity	Text	31	Cannot exceed 31 characters - numbers are not allowed
SeasonalState	Text	2	Cannot exceed 2 characters
SeasonalZipCode	Text	5	First five digits only. Cannot contain dash separators
*TotalGivingDollars	Text/Int	8	Cannot be NULL. Insert 0.00 if unavailable. Cannot contain \$ or “,” and cannot exceed 8 characters
TotalNumberOfGifts	Text/Int	4	Cannot exceed 4 characters
LargestGiftAmount	Text/Int	8	Cannot contain \$ or “,” and cannot exceed 8 characters
LargestGiftDate	Text	10	MM/DD/YYYY format required. Must be 10 characters.
MostRecentGiftAmount	Text/Int	8	Cannot contain \$ or “,” and cannot exceed 8 characters
MostRecentGiftDate	Text	10	MM/DD/YYYY format required. Must be 10 characters.
Relationship	Text	50	Cannot exceed 50 characters
ConstituentCode1	Text	50	Cannot exceed 50 characters
ConstituentCode2	Text	50	Cannot exceed 50 characters
ConstituentCode3	Text	50	Cannot exceed 50 characters
Age	Text/Int	5	Cannot exceed 5 characters
DateOfBirth	Text	10	MM/DD/YYYY format required. Must be 10 characters.
SpouseID	Text	50	Cannot exceed 50 characters
SpouseFirst	Text	30	No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 30 characters
SpouseMiddle	Text	30	Cannot exceed 30 characters
SpouseLast	Text	50	No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 50 characters
AssignedSolicitor	Text	75	Cannot exceed 75 characters
PreferredClassYear	Text	30	Cannot exceed 30 characters
PreferredSchool	Text	50	Cannot exceed 50 characters
PreferredDepartment	Text	50	Cannot exceed 50 characters
CampusSite	Text	30	Cannot exceed 30 characters
GraduationDate	Text	30	Cannot exceed 30 characters
MembershipType	Text	30	Cannot exceed 30 characters
ClientDefinedField_1	Text	75	Cannot exceed 75 characters
ClientDefinedField_2	Text	75	Cannot exceed 75 characters
ClientDefinedField_3	Text	150	Cannot exceed 150 characters
ClientDefinedField_4	Text	75	Cannot exceed 75 characters
ClientDefinedField_5	Text	75	Cannot exceed 75 characters
ClientDefinedField_6	Text	75	Cannot exceed 75 characters
ClientDefinedField_7	Text	75	Cannot exceed 75 characters
ClientDefinedField_8	Text	75	Cannot exceed 75 characters
ClientDefinedField_9	Text	75	Cannot exceed 75 characters
ClientDefinedField_10	Text	75	Cannot exceed 75 characters
ClientDefinedField_11	Text	75	Cannot exceed 75 characters
ClientDefinedField_12	Text	75	Cannot exceed 75 characters
ClientDefinedField_13	Text	75	Cannot exceed 75 characters
ClientDefinedField_14	Text	75	Cannot exceed 75 characters
ClientDefinedField_15	Text	75	Cannot exceed 75 characters
ClientDefinedField_16	Text	75	Cannot exceed 75 characters
ClientDefinedField_17	Text	75	Cannot exceed 75 characters

ClientDefinedField_18	Text	75	Cannot exceed 75 characters
ClientDefinedField_19	Text	75	Cannot exceed 75 characters
ClientDefinedField_20	Text	75	Cannot exceed 75 characters

An Add Multiple Prospects record should look like the following in comma and quote file formatting:

```
"AccountId","ProspectId","ScreeningIndicator","FirstName","MiddleName","LastName","HomeStreetAddress","HomeAptUnitSuite","HomeCity","HomeState","HomeZipCode","134","0012345","Y","John","Q","Sample","123 Main Street","","Metropolis","NY","01234"
```