

## 2014 Data File Specifications

### DONORSCAPE® Wealth Screening

*Please provide data tables in the following file format:*

- ASCII text (.txt) with field headers
- Field delimiter must be comma/quote, pipe, or tab
- Contact GG+A for other formats such as Excel or MS Access

*Include with the data:*

- A copy of the record layout
- Definitions of all codes used within the file, such as constituent codes, marital status, client defined fields, etc.

*Records for screening:*

- *Include* all living individuals
- *Exclude* all corporations, foundations, and other non-individual entities

*Data Transfer:*

- When the file is ready to be transferred, please upload to our secure dropbox located at:  
<https://www.hightail.com/u/grenzglier>
- GG+A will confirm receipt in 1–2 business days.
- GG+A provides end-to-end 128-bit SSL encryption for file transfers. For additional security, GG+A recommends transferring data in encrypted archives. There are many software packages that enable encrypted archives, including the free, open-source package 7-Zip, available at <http://www.7-zip.org>.

*Contact us:*

- If you have any questions regarding your data file submission, please contact:
  - Alex Marianyi, analytics consultant, 312-372-5050 x4038, [amarianyi@grenzglier.com](mailto:amarianyi@grenzglier.com) or
  - Liz Krumwiede, manager of analytics operations, 312-372-5050 x4026, [ekrumwiede@grenzglier.com](mailto:ekrumwiede@grenzglier.com).
- For general inquiries and DONORSCAPE® support, please contact us by phone at 866-378-8540 or via email at [support@donorscape.com](mailto:support@donorscape.com).

## Biographical Data

### Required fields in Bold

Data	GG+A Preferred Header	Notes
<b>Unique Entity ID Number</b>	<i>ProspectID</i>	Include any leading zeros
Title	<i>Title</i>	e.g., Mr., Mrs., Dr.
<b>First Name</b>	<i>FirstName</i>	
Middle Name / Initial	<i>MiddleName</i>	
<b>Last Name</b>	<i>LastName</i>	
Suffix	<i>Suffix</i>	e.g., Jr., Sr., III
Date of Birth	<i>DateOfBirth</i>	mm/dd/yyyy (Partial DOB is okay)
Age	<i>Age</i>	
Gender	<i>Gender</i>	
Marital Status	<i>MaritalStatus</i>	
Spouse ID	<i>SpouseId</i>	If separate record exists
Spouse First Name	<i>SpouseFirst</i>	Regardless of separate spouse record
Spouse Middle Name / Initial	<i>SpouseMiddle</i>	Regardless of separate spouse record
Spouse Last Name	<i>SpouseLast</i>	Regardless of separate spouse record
Employer/Business Name	<i>Employer</i>	As it is available
Job Title	<i>JobTitle</i>	
<b>Home Address Line 1</b>	<i>HomeStreetAddress</i>	Street Name & Number
Home Address Line 2	<i>HomeAptUnitSuite</i>	Apartment, Unit, or Suite
<b>Home City</b>	<i>HomeCity</i>	
<b>Home State/Province</b>	<i>HomeState</i>	
<b>Home Postal Code</b>	<i>HomeZipCode</i>	
Home Telephone Number	<i>HomePhone</i>	
Business Address Line 1	<i>BusinessStreetAddress</i>	Street Name & Number
Business Address Line 2	<i>BusinessAptUnitSuite</i>	Apartment, Unit, or Suite
Business City	<i>BusinessCity</i>	
Business State/Province	<i>BusinessState</i>	
Business Postal Code	<i>BusinessZipCode</i>	
Business Telephone Number	<i>BusinessPhone</i>	
Seasonal Address Line 1	<i>SeasonalStreetAddress</i>	Street Name & Number
Seasonal Address Line 2	<i>SeasonalAptUnitSuite</i>	Apartment, Unit, or Suite
Seasonal City	<i>SeasonalCity</i>	
Seasonal State/Province	<i>SeasonalState</i>	
Seasonal Postal Code	<i>SeasonalZipCode</i>	

### Notes:

- Please include the most current active address that you have on record. GG+A will provide address cleaning and National Change of Address (NCOA) updates; please let us know if you **do not** want us to use NCOA results for screening. To facilitate address import to your donor database, please supply the address import ID.
- Ensure Home Address is primary residence; not necessarily “preferred” mailing address. **GG+A cannot guarantee the accuracy of data acquired using a non-residential address when provided as home address.**
- Seasonal Address might include vacation/2nd home, secondary business, or any additional current address.
- PO Boxes, APO/FPO, and addresses in Puerto Rico, Virgin Islands, Guam and other U.S. Territories are acceptable.

## Relationship Information

### Required fields in Bold

Data	GG+A Preferred Header	Notes
<b>Primary Constituent Type</b>	<i>Relationship</i>	e.g., Alumni, Parent, Member, etc
Additional Constituent Types	<i>ConstituentCode1</i> <i>ConstituentCode2</i> <i>ConstituentCode3</i>	Use constituent hierarchy
Preferred Class Year	<i>PreferredClassYear</i>	For education institutions
Preferred School/College/Unit	<i>PreferredSchool</i>	
Preferred Department/Degree	<i>PreferredDepartment</i>	
Additional Class Year		For education institutions
Additional School/College/Unit		
Additional Department/Degree		
Campus Site	<i>CampusSite</i>	
Graduation Date	<i>GraduationDate</i>	mm/dd/yyyy
Membership Type	<i>MembershipType</i>	For membership organizations
<b>Gift Officer Assigned as Primary</b>	<i>AssignedSolicitor</i>	Lastname, Firstname
Gift Officer School/Unit/Area		e.g., Athletics, Business, Planned Giving
Overall Prospect Stage/Phase		e.g., Cultivation, Solicitation, Stewardship

### Notes:

- DONORSCAPE provides an **additional 20 fields** (referred to as “Client Defined Fields”) which store string data of any type or content. Any supplied data intended to be loaded into the DONORSCAPE application which is not assigned to a field with a “GG+A Preferred Header” will be loaded into a client defined field. These fields may be used in custom queries for list generation and appear in some pre-formatted reports. In addition, client defined fields can be exported to a spreadsheet or text file, along with other selected fields.
- Examples include: Import ID, Head of Household Indicator, Email Address, Planned Giving Indicator, Largest Gift Designation, Prospect Stage, Last Visit Date (for medical clients).
- GG+A reserves client field 20 for the batch ID (to differentiate between upload files). By default, GG+A sets this to the processing date (in yyyyymmdd format), or you may indicate a different batch ID in your submission.

## Giving History

### Required fields in Bold

#### *Giving History Counting:*

- **Gift Commitments, not Cash** (i.e. Outright Gifts and Pledges, no pledge payments)
- Include soft/recognition credits from non-individuals when appropriate
- Indicate your spouse and soft crediting policy (i.e. split or equal credit), **especially regarding credits from non-individual entities**
- **Unless otherwise indicated, Gifts/Giving means Commitments**

#### *Giving History Exclusions:*

- Matching gifts (the employer match)
- In-kind gifts of “service” (in-kind gifts of real estate, art, securities, etc. are okay)
- Write-offs

<b>Data</b>	<b>GG+A Preferred Header</b>	<b>Notes</b>
<b>Cumulative Total Giving</b>	<i>TotalGivingDollars</i>	Commitments
Number of Total Commitments	<i>TotalNumberOfGifts</i>	
Largest Single Gift Amount	<i>LargestGiftAmount</i>	Cash (outright gift or pledge payment)
Largest Single Gift Date	<i>LargestGiftDate</i>	mm/dd/yyyy, oldest date
Most Recent Gift Date	<i>MostRecentGiftDate</i>	mm/dd/yyyy, most recent transaction
Most Recent Gift Amount	<i>MostRecentGiftAmount</i>	Commitment or Cash
First Gift Amount		Commitment
First Gift Date		mm/dd/yyyy