

Importing DonorScape Ratings into *The Raiser's Edge*

1. Isolate and Export a Prospect List

Use a simple search process to find an individual prospect, or generate a list of prospects, based on a few standard criteria.

1. Click the navigation bar (top of screen) to go to the **Explore Prospects** page, and stay on the default **Simple Search** tab:

The screenshot shows the 'Simple Search' interface. At the top, there are tabs for 'Simple Search' and 'Advanced Search', and a 'Saved Searches' dropdown menu set to 'Top 10000'. The main area is divided into three columns:

- General Information:** Prospect ID (text field), First Name (text field), Last Name (text field), Age (slider with 'Nom - 100' label), Date Uploaded (calendar pickers), and Last Updated (calendar pickers).
- Wealth Information:** Gift Capacity (slider with 'Nom - 1' label), Major Gift Code (slider with 'Nom - A' label), Annual Giving Code (slider with 'Nom - 1' label), Planned Giving Code (slider with 'Nom - P' label), Philanthropic Capacity Rating (slider with 'Nom - P1' label), and Prizm Cluster Code (dropdown menu).
- Location Information:** City (text field), State(s) (dropdown menu with 'Please select'), Zip Code(s) (text field with 'Enter zip codes with commas'), and MSA(s) (dropdown menu with 'Please select').

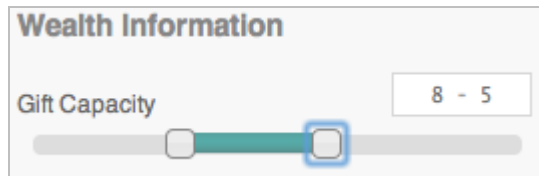
At the bottom right, there are 'Search' and 'Clear Filters' buttons.

2. Use a standard search, or customize your search.

To find this...	Use this...
An Individual Prospect	Enter the prospect's name, or Prospect ID .
Standard List of Prospects	Choose an option from the Saved Searches menu (at top right of screen).
Prospects Based on Gift Capacity	Select the Gift Capacity , then enter any other important criteria. For example, set Gift Capacity to "8 - 5" and State to "NY" to find donors with a

To find this...	Use this...
	gift capacity <\$99,999 who live in NY.
All Prospects in Database	Do not set any search criteria.
Prospect List from a Saved Search	Choose an option from the Saved Searches menu.

For criteria that display a bar, click the tabs (at left and right) to set a range:



To reset the entire search, click **Clear Filters** (at bottom right).

3. Click the **Search** button (at bottom right).

The Search Results appear:

Profile Data		Wealth Data					Wealth Indicators		Giving Codes			
Name	Relationship	Total Giving	Income	Real Estate	Securities	Other	GCR	Gift Capacity	Major	Annual	Planned	PCR
Jones, Robert #9408	Age: 70	\$8,966 State: CA	\$1,078,951	\$2,422,938	\$554,661	\$2,464,172,364	1	>\$10M	E	1	T	P1
Harrison, William #1717	Age: 90	\$5,201 State: NY	\$72,212,019	\$200,000	\$59,362,024	\$7,555	1	>\$10M	E	1	T	P4
Nolan, Peter #8171	Age: 68	\$7,388 State: CA	\$567,981	\$1,683,239	\$345,648,727	\$23,562	1	>\$10M	E	1	T	P4
Kaplan, Stephen #981	Age: 56	\$34,027 State: NJ	\$150,000	\$750,000	\$624,109,030	\$730	1	>\$10M	E	1	X	P4
Jones, Robert		\$553	\$2,358,951	\$1,500,000	\$554,661	\$2,464,386,207	1	>\$10M	E	4	X	P1

4. To make the search more or less restrictive, change the Match Quality.

Click the target (at top of search results) to select options.

Settings range from the most restrictive (center) to least restrictive (outer ring), as follows: **Exact**, **Near**, **Possible**, **Simple**.



Tip: Use a setting that supports your goals:

- **E, N:** Best for a standard search. Finds information on prospects and their spouses. Data accuracy is good, but some prospects are missed.
- **E, N, P** or **E, N, P, S:** Best if you will be reviewing and verifying data. Finds more obscure prospects, but may include some false matches.

- **E:** Best for very limited searches. Finds information only on prospects (not their spouses). Data is highly accurate, but may miss prospects.
5. To toggle back and forth between searches and results, click the list icon (located at top-left of Search Results, and top-right of Search):



Export Search Results

Export the prospect list in Excel format, so you can analyze or share your search results.

1. Go to the **Explore Prospects** page. Search for prospects, and go to the **Search Results**.
2. To customize the types of information to be exported in the spreadsheet, click the gear icon (at top right of Search Results):



3. Click the download icon to export the Search Results.
You will receive an email when the export is ready for download from the **Search Results** page. The download link will remain visible until you log out of your session.

2. Raiser's Edge Setup Prior to Import

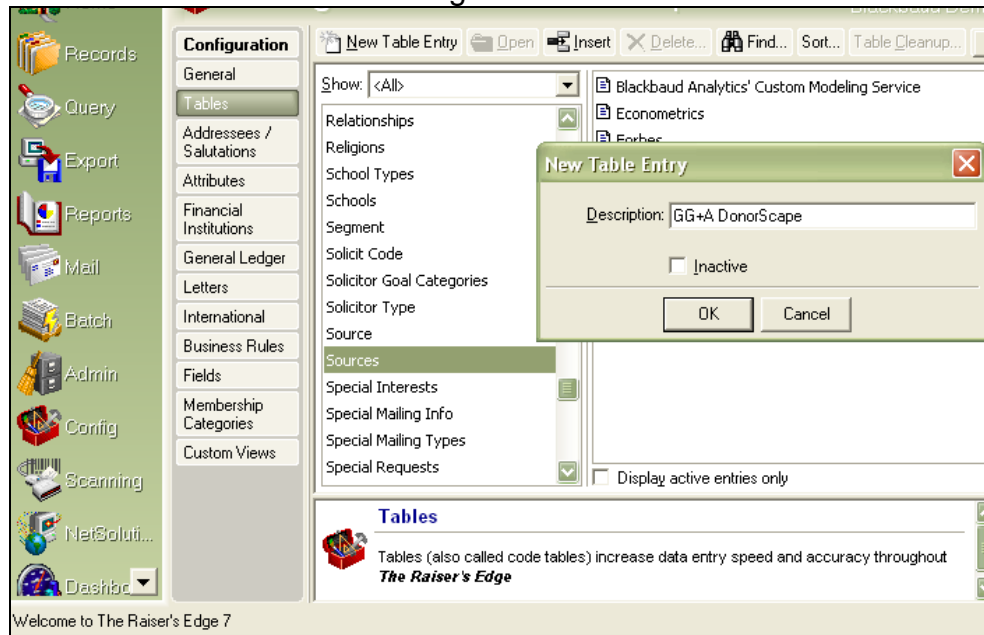
All import instructions below assume the RE: Prospect module is in use. If this module is not available, ratings and codes from DonorScape can be imported as constituent attributes. See the section "Importing DonorScape Ratings as Attributes" below for more details.

Ratings

Importing DonorScape ratings and codes requires table values setup with the RE Prospect tab prior to import. This can be done under "Configuration" using "Table" setup.

TABLE: Sources

Begin by creating a “Sources” table value of “GG+A DonorScape”. All ratings and codes imported will have this source value assigned.



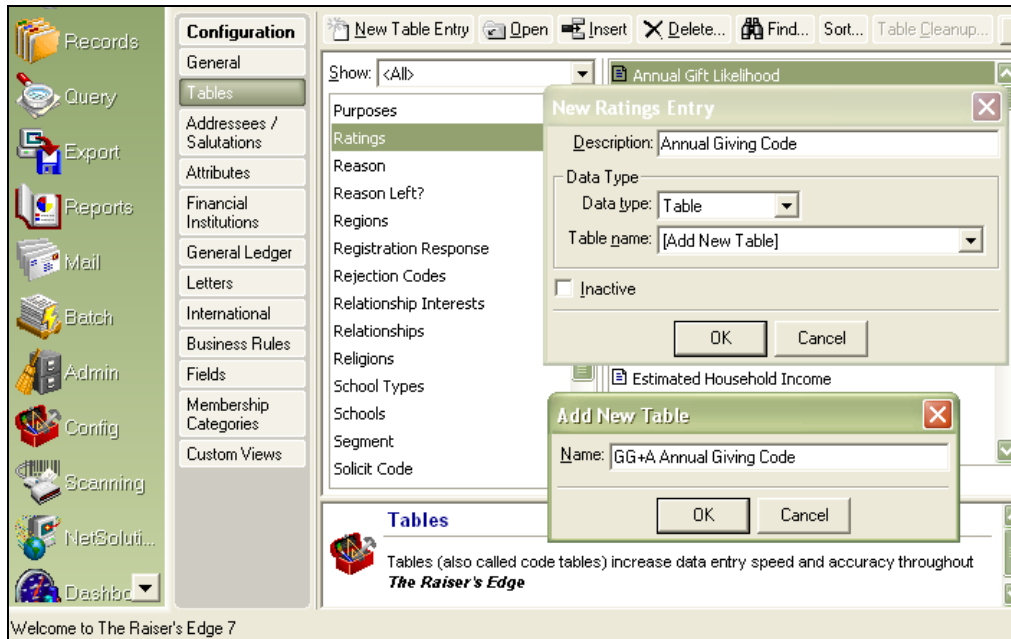
Setting RE Source Value

TABLE: Ratings

Ratings values must be set for each imported DonorScape rating and code. Each new rating description must have a corresponding table set up for its values. This is done by selecting “[Add New Table]” for the Table Name field during “New Ratings Entry”. See the figure below.

Use the following table to enter the Ratings Descriptions and Table Names for the DonorScape ratings and codes.

New Ratings Description	Add New Table Name
Annual Giving Code	GG+A Annual Giving Rating
Estimated Household Income	GG+A Household Income
Gift Capacity Estimate	GG+A Gift Capacity Estimate
Gift Capacity Rating	GG+A Gift Capacity Rating
Home Market Value	GG+A Home Value
Major Gift Code	GG+A Major Gift Rating
Planned Giving Code	GG+A Planned Gift Rating
PRIZM Cluster Code	GG+A PRIZM
Special Focus Code	GG+A Special Focus



Setting Ratings Value

3. Data Preparation for Raiser's Edge Import

Export File

The comma delimited text file downloaded from the mydonorscape.com website must be formatted into a file structure that The Raiser's Edge import process can recognize. Depending on the size of your downloaded file, this can be accomplished using a spreadsheet application such as MS Excel. For larger files (over 65K records) a database program such as MS Access should be used. All Ratings and Codes can be formatted into one file structure with the following fields:

Field Name	Description
ConsID	The DonorScape "prospectid" field.
PRateDesc	The actual ratings returned from DonorScape.
PRateCat	"Ratings" table values setup previously in RE.
PRateSource	"Source" table value setup previously in RE.
PRateDate	The date of the DonorScape screening (not the import date).

The file must be in the comma delimited format. Depending upon the size of the import data file, all codes and ratings can be combined into one import file. Below are examples of how the import file should be built for each rating imported:

Major Gift Code

DonorScape export field name: **ggaMajorGiftCode**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
232	A	Major Gift Code	GG+A DonorScape	7/1/2008
12241	C	Major Gift Code	GG+A DonorScape	7/1/2008

2232	E	Major Gift Code	GG+A DonorScape	7/1/2008
1222	B	Major Gift Code	GG+A DonorScape	7/1/2008
4216	A	Major Gift Code	GG+A DonorScape	7/1/2008

Note that the Major Gift Codes (A-E) should be imported as is. No translation is necessary for code values.

Annual Giving Code

DonorScape export field name: **ggaAnnualGivingCode**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
32	2	Annual Giving Code	GG+A DonorScape	7/1/2008
38	1	Annual Giving Code	GG+A DonorScape	7/1/2008
268	2	Annual Giving Code	GG+A DonorScape	7/1/2008
361	4	Annual Giving Code	GG+A DonorScape	7/1/2008
444	1	Annual Giving Code	GG+A DonorScape	7/1/2008

Note that the Annual Giving Code (1-6) may be augmented to add descriptive values prior to import. Use the list below to adjust the values in the export file if needed.

- 1 - \$5,000
- 2 - \$2,500
- 3 - \$1,000
- 4 - \$500
- 5 - \$100
- 6 - <\$100

Planned Giving Code

DonorScape export field name: **ggaPlannedGivingCode**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
6	X	Planned Giving Code	GG+A DonorScape	7/1/2008
7	S	Planned Giving Code	GG+A DonorScape	7/1/2008
9	T	Planned Giving Code	GG+A DonorScape	7/1/2008
10	T	Planned Giving Code	GG+A DonorScape	7/1/2008
11	T	Planned Giving Code	GG+A DonorScape	7/1/2008

PRIZM Cluster Code

DonorScape export field name: **prizmClusterCode**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
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1	27 - Middleburg Managers	PRIZM Cluster Code	GG+A DonorScape	7/1/2008
2	29 - American Dreams	PRIZM Cluster Code	GG+A DonorScape	7/1/2008
4	04 - Young Digerati	PRIZM Cluster Code	GG+A DonorScape	7/1/2008
5	29 - American Dreams	PRIZM Cluster Code	GG+A DonorScape	7/1/2008
6	19 - Home Sweet Home	PRIZM Cluster Code	GG+A DonorScape	7/1/2008

Note that the PRIZM Cluster Codes may be augmented to add descriptive values prior to import. Refer to “Appendix A – PRIZM Cluster Code Descriptions” for descriptions for altering the export file.

Special Focus Indicator

DonorScape export field name: **ggaSpecialFocusIndicator**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
10	NL	Special Focus Code	GG+A DonorScape	7/1/2008
11	NL	Special Focus Code	GG+A DonorScape	7/1/2008
37	NL	Special Focus Code	GG+A DonorScape	7/1/2008
54	NL	Special Focus Code	GG+A DonorScape	7/1/2008
73	NL	Special Focus Code	GG+A DonorScape	7/1/2008

Estimated Household Income

DonorScape export field name: **estimatedHouseholdIncome**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
1	\$30,000 - \$39,999	Estimated Household Income	GG+A DonorScape	7/1/2008
2	\$50,000 - \$74,999	Estimated Household Income	GG+A DonorScape	7/1/2008
4	\$75,000 - \$99,999	Estimated Household Income	GG+A DonorScape	7/1/2008
6	GREATER THAN \$124,999	Estimated Household Income	GG+A DonorScape	7/1/2008
7	\$75,000 - \$99,999	Estimated Household Income	GG+A DonorScape	7/1/2008

Home Market Value

DonorScape export field name: **homeMarketValue**

Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
1	\$50,000 - \$74,999	Home Market Value	GG+A DonorScape	7/1/2008
2	\$300,000 - \$349,999	Home Market Value	GG+A DonorScape	7/1/2008
4	\$150,000 - \$174,999	Home Market Value	GG+A DonorScape	7/1/2008
5	\$175,000 - \$199,999	Home Market Value	GG+A DonorScape	7/1/2008
6	\$125,000 - \$149,999	Home Market Value	GG+A DonorScape	7/1/2008

Gift Capacity Estimate

Gift Capacity Rating

Gift Capacity Estimates and Ratings may be imported based on “Exact”, “Exact & Near” or “Exact&Near&Possible” match criteria. Your DonorScape account manager will help you decide which level of match is appropriate for import.

DonorScape export field names (depending on match level chosen):

Exact&Near&PossibleGiftCapacityEstimate

Exact&Near&PossibleGiftCapacityRating

Exact&NearGiftCapacityEstimate

Exact&NearGiftCapacityRating

ExactGiftCapacityEstimate

ExactGiftCapacityRating

Gift Capacity Estimate Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
11	\$25 000 to \$99 999	Gift Capacity Estimate	GG+A DonorScape	7/1/2008
73	\$250 000 to \$999 999	Gift Capacity Estimate	GG+A DonorScape	7/1/2008
133	\$25 000 to \$99 999	Gift Capacity Estimate	GG+A DonorScape	7/1/2008
268	\$25 000 to \$99 999	Gift Capacity Estimate	GG+A DonorScape	7/1/2008
329	\$100 000 to \$249 999	Gift Capacity Estimate	GG+A DonorScape	7/1/2008

Gift Capacity Rating Import File Example:

ConsID	PRateDesc	PRateCat	PRateSource	PRateDate
1	10	Gift Capacity Rating	GG+A DonorScape	7/1/2008
2	10	Gift Capacity Rating	GG+A DonorScape	7/1/2008
3	10	Gift Capacity Rating	GG+A DonorScape	7/1/2008
4	10	Gift Capacity Rating	GG+A DonorScape	7/1/2008
5	10	Gift Capacity Rating	GG+A DonorScape	7/1/2008

4. Final Import Process

The comma delimited ratings file built based on the above specifications should be uploaded using the “Prospect Ratings” import utility under Constituent Imports. The field names used above will automatically map to the correct RE field name once the import file is loaded in the utility. Refer to Raiser’s Edge documentation for more details on using this utility.

Note that the “Create New Table Entries” check box **MUST** be selected for proper import.

Importing DonorScape Ratings as Attributes

Organizations not using the RE Prospect module can import ratings into constituent attributes. Each rating category should be set up as a distinct attribute with table values assigned in similar structure as detailed above.

For example, the Annual Giving Code, would be set up under Configuration/Attributes as a new attribute named "GG+A Annual Giving Code". An attribute table with the same name should be setup to house the values of the new attribute. This should be done for all ratings and codes imported into Raiser's Edge.

The import file structure for the new attributes is listed below:

ConsID	CAttrDesc	CAttrDate	CAttrCat
10	1	7/1/2008	GG+A Annual Giving Code
10000	3	7/1/2008	GG+A Annual Giving Code
10006	2	7/1/2008	GG+A Annual Giving Code
10012	4	7/1/2008	GG+A Annual Giving Code
1005	2	7/1/2008	GG+A Annual Giving Code

The Import Process named "Constituent Attribute Import" should be used within Raiser's Edge.

Additional Import Processes

Other data from DonorScape may imported into The Raiser's Edge based on an organization's needs.

Age/Birthdate

Birthdate is a constituent import. Since Donorscape returns only Age, birthdate can only be calculated as year of birth. Raiser's Edge import will allow year only imports. File structure is as follows:

ConsID	Bday	KeyInd
16270	1985	I
15740	1985	I
15731	1985	I
11734	1985	I
867	1985	I
15735	1985	I
16265	1985	I

Home Address updates

Updated addresses in Raiser's Edge is a three step process:

1. Identify addresses that have changed. Note that changes may have been made to constituent addresses since the original data was provided for screening. It's important to identify these address updates and exclude them from any import changes.
2. Addresses flagged by DonorScape as changed must then be imported into Raiser's Edge and identified as "Former Home Addresses". Address Import IDs are necessary for this import.

3. New or changed addresses are imported into Raiser's Edge.

Financial Information

Similar to RE Prospect Ratings, financial information from DonorScape may also be imported into the RE Prospect Module under "Financial Information". Speak to your DonorScape account manager for more details. Listed below are some types of DonorScape financial data that can be captured in Raiser's Edge:

- a. FEC Contributions
- b. Income
- c. Pension
- d. Real Estate
- e. SEC Direct Holdings

Appendix A – PRIZM Cluster Code Descriptions

01 - Upper Crust	35 - Boomtown Singles
02 - Blue Blood Estates	36 - Blue-Chip Blues
03 - Movers & Shakers	37 - Mayberry-ville
04 - Young Digerati	38 - Simple Pleasures
05 - Country Squires	39 - Domestic Duos
06 - Winner's Circle	40 - Close-In Couples
07 - Money & Brains	41 - Sunset City Blues
08 - Executive Suites	42 - Red, White & Blues
09 - Big Fish, Small Pond	43 - Heartlanders
10 - Second City Elite	44 - New Beginnings
11 - God's Country	45 - Blue Highways
12 - Brite Lites, Li'l City	46 - Old Glories
13 - Upward Bound	47 - City Startups
14 - New Empty Nests	48 - Young & Rustic
15 - Pools & Patios	49 - American Classics
16 - Bohemian Mix	50 - Kid Country, USA
17 - Beltway Boomers	51 - Shotguns & Pickups
18 - Kids & Cul-de-Sacs	52 - Suburban Pioneers
19 - Home Sweet Home	53 - Mobility Blues
20 - Fast-Track Families	54 - Multi-Culti Mosaic
21 - Gray Power	55 - Golden Ponds
22 - Young Influentials	56 - Crossroads Villagers
23 - Greenbelt Sports	57 - Old Milltowns
24 - Up-and-Comers	58 - Back Country Folks
25 - Country Casuals	59 - Urban Elders
26 - The Cosmopolitans	60 - Park Bench Seniors
27 - Middleburg Managers	61 - City Roots
28 - Traditional Times	62 - Hometown Retired
29 - American Dreams	63 - Family Thrifts
30 - Suburban Sprawl	65 - Big City Blues
31 - Urban Achievers	66 - Low-Rise Living
32 - New Homesteaders	
33 - Big Sky Families	
34 - White Picket Fences	