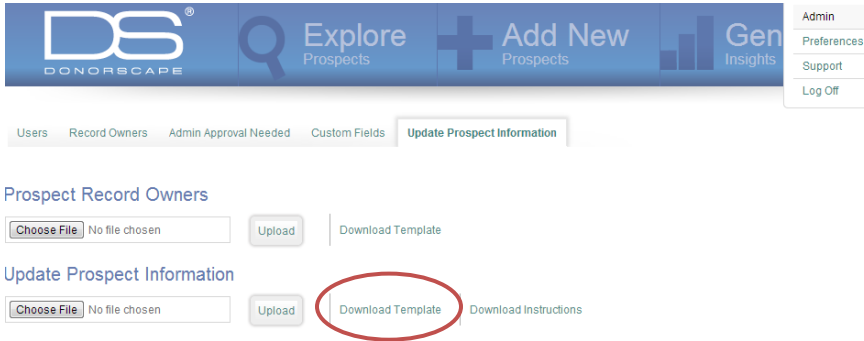




## DONORSCAPE® UPDATE MULTIPLE PROSPECTS

The Update Multiple Prospects feature allows Admin level users to update prospect information with the click of a button.

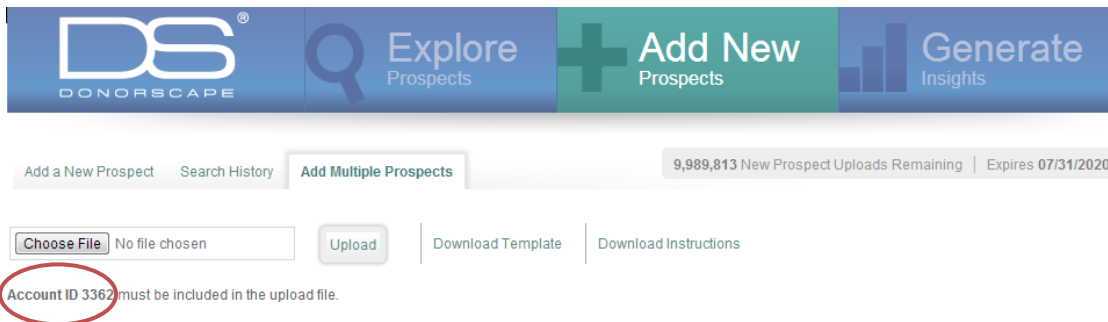


### Preparing a File for Update Multiple Prospects

- Fill out the Update Multiple Prospects template following the tech specifications. These specifications are EXACT. Variations will cause your updates to be rejected. Specifications can be found by hovering over the column headers in the template and are listed below.
  - Account ID and Prospect ID are required columns. They have a yellow heading in the template. All other columns are optional and may be deleted if unused.

	A	B	C	D	E	F	G	H	I
1	AccountID	ProspectID	SpouseID	HomeStreetAddress	HomeAptUnitSuite	HomeCity	HomeState	HomeZipCode	BusinessStreet
2									
3									
4									

- Your Account ID is listed under Add New Prospects > Add Multiple Prospects




- Save the file in a comma delimited format (.CSV or .TXT) beginning with your Account ID (Ex: 1001\_JanuaryUpdates.csv or 1001\_January Updates.txt)

- Once your Update 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.

### Update Errors

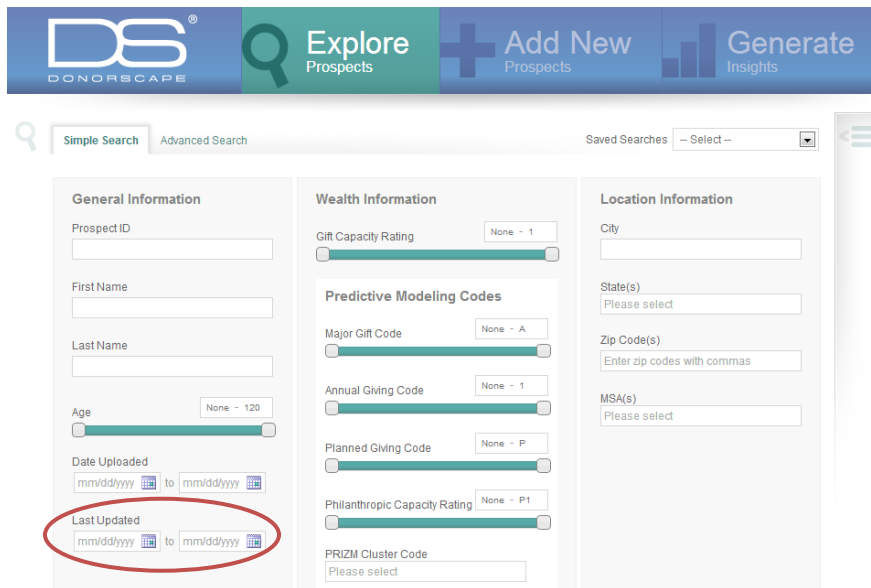
- If your uploaded file contained validity errors, this table will display the row number and the type of error that exists. A validity error may prevent the entire file from being processed. Once all validity errors have been corrected, the file can immediately be uploaded again through the Update Multiple Prospects feature.
- You will receive an email once the update is complete.

### Rescreen Updated Records

- To rescreen the ratings and wealth matches for an individual prospect using this new information, open the prospect's record and click the rescreen icon  next to the prospect's name.
- To rescreen the entire database contact DonorScape support at support@donorscape.com or (866) 378-8540.

### Isolate Updated Records

- To isolate updated records select the date range in which updates took place under the Last Updated feature on the Simple Search function



The screenshot shows the DonorScape web interface with the search filters section. The 'Last Updated' filter is circled in red. The interface includes a navigation bar with 'DS DONORSCAPE', 'Explore Prospects', 'Add New Prospects', and 'Generate Insights'. Below the navigation bar, there are tabs for 'Simple Search' and 'Advanced Search', and a 'Saved Searches' dropdown menu. The search filters are organized into three columns: General Information, Wealth Information, and Location Information. The 'Last Updated' filter is located in the General Information column and is highlighted with a red circle.

**For more information: Consult DonorScape Online Support Resources or contact [support@donorscape.com](mailto:support@donorscape.com)**

## UPDATE FILE FORMAT REFERENCE TABLE

\*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
*ProspectID	Text	32	Cannot be NULL. Each record must have a unique ProspectID. Cannot exceed 32 characters in length
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
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

<b>MostRecentGiftAmount</b>	Text/Int	8	Cannot contain \$ or “,” and cannot exceed 8 characters
<b>MostRecentGiftDate</b>	Text	10	MM/DD/YYYY format required. Must be 10 characters
<b>Relationship</b>	Text	50	Cannot exceed 50 characters
<b>ConstituentCode1</b>	Text	50	Cannot exceed 50 characters
<b>ConstituentCode2</b>	Text	50	Cannot exceed 50 characters
<b>ConstituentCode3</b>	Text	50	Cannot exceed 50 characters
<b>SpouseID</b>	Text	50	Cannot exceed 50 characters
<b>SpouseFirst</b>	Text	30	No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 30 characters
<b>SpouseMiddle</b>	Text	30	Cannot exceed 30 characters
<b>SpouseLast</b>	Text	50	No special characters (commas, hyphens, apostrophes, periods, etc.) or numbers allowed. Cannot exceed 50 characters
<b>AssignedSolicitor</b>	Text	75	Cannot exceed 75 characters
<b>PreferredClassYear</b>	Text	30	Cannot exceed 30 characters
<b>PreferredSchool</b>	Text	50	Cannot exceed 50 characters
<b>PreferredDepartment</b>	Text	50	Cannot exceed 50 characters
<b>CampusSite</b>	Text	30	Cannot exceed 30 characters
<b>GraduationDate</b>	Text	30	Cannot exceed 30 characters
<b>MembershipType</b>	Text	30	Cannot exceed 30 characters
<b>ClientDefinedField_1</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_2</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_3</b>	Text	150	Cannot exceed 150 characters
<b>ClientDefinedField_4</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_5</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_6</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_7</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_8</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_9</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_10</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_11</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_12</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_13</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_14</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_15</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_16</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_17</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_18</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_19</b>	Text	75	Cannot exceed 75 characters
<b>ClientDefinedField_20</b>	Text	75	Cannot exceed 75 characters