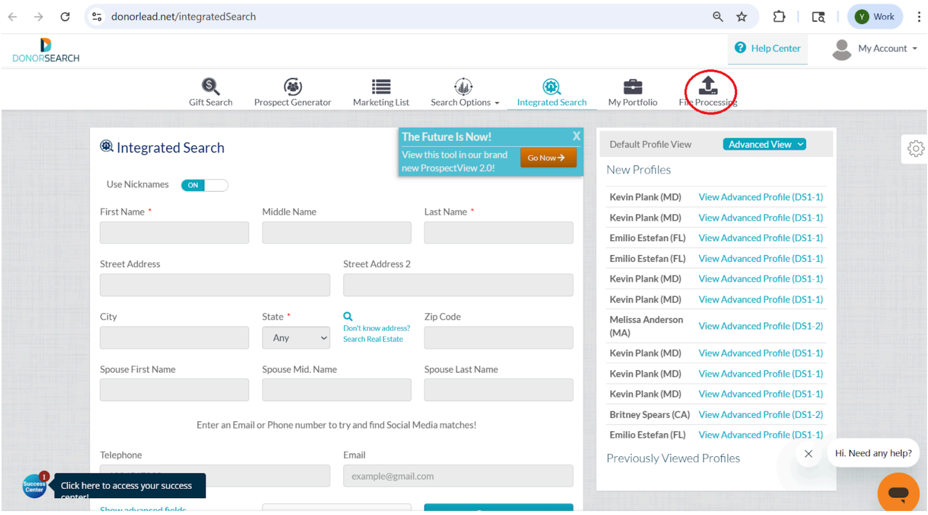
How do I upload my screening?

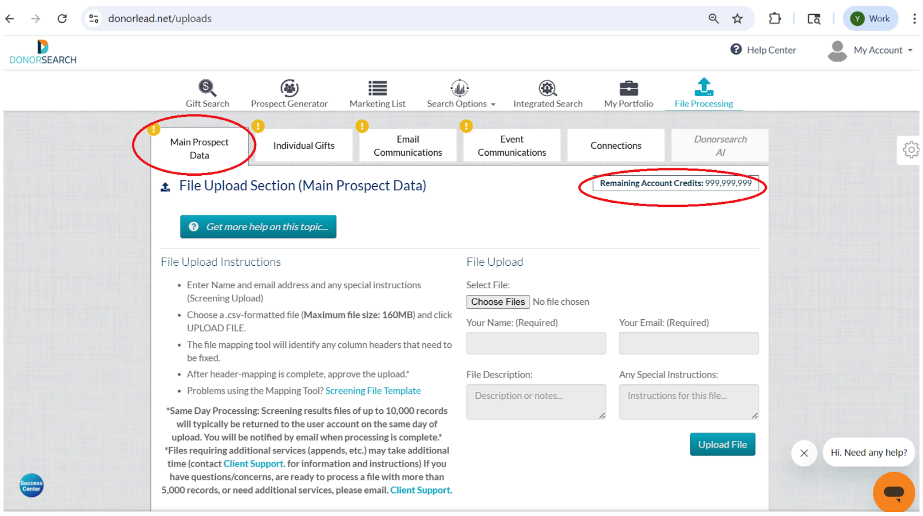
1. Log in to the DonorSearch Tool.
2. Select the “File Processing” icon at the top of the screen.

**** Only the Master Account holder will be able to upload files for screening under the File Processing tab. Sub-Users do not have access to the File Processing tab. If you are logged into the Master Account and do not see this tab, please contact us at clientsupport@donorsearch.net ****

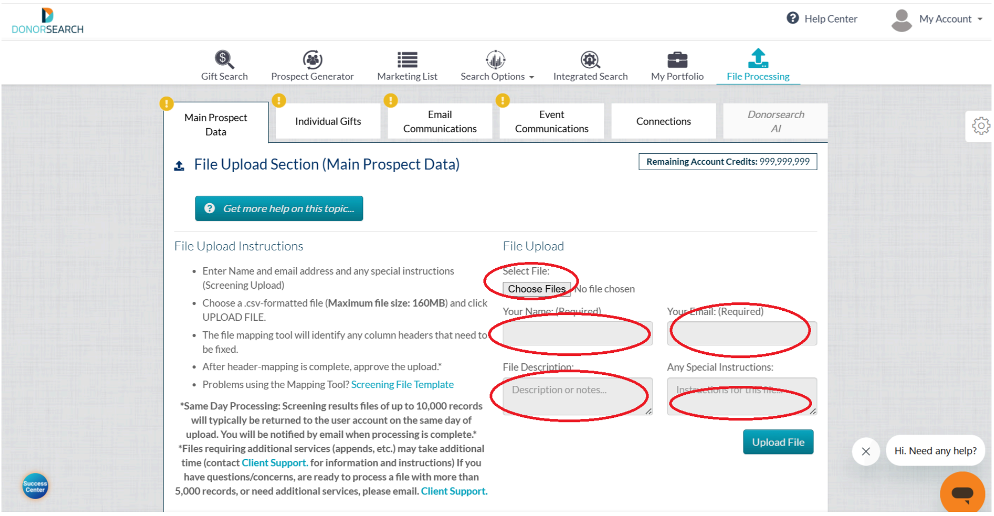


[Click here](#) to follow our guide on how to upload a screening file.

3. You will upload your screening file to the “Main Prospect Data” tab within File Processing. The remaining account credits are also listed on this page in the top right corner.



Please keep in mind that you won't be able to go over your allotted amount of credits.



4. Select that you would like by clicking on “Choose File”.

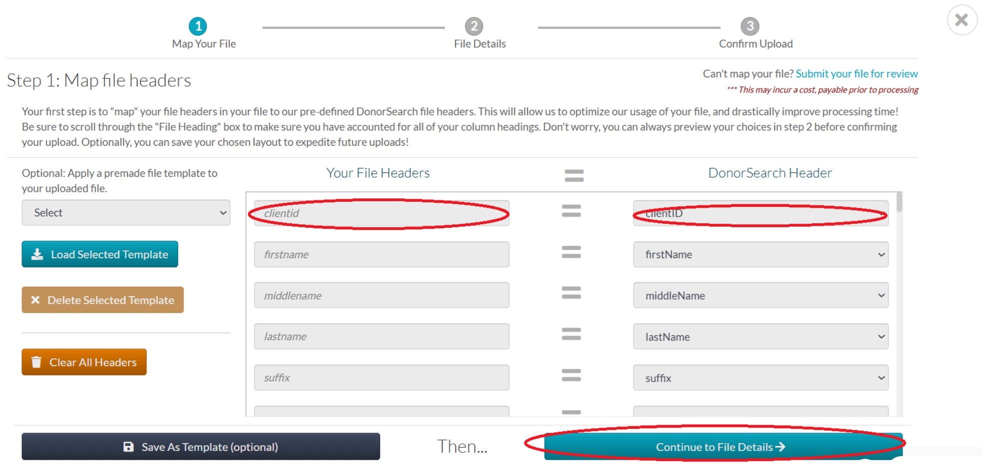
5. Enter your name and your email address.

6. Enter a file description and any special instructions (this step is optional).

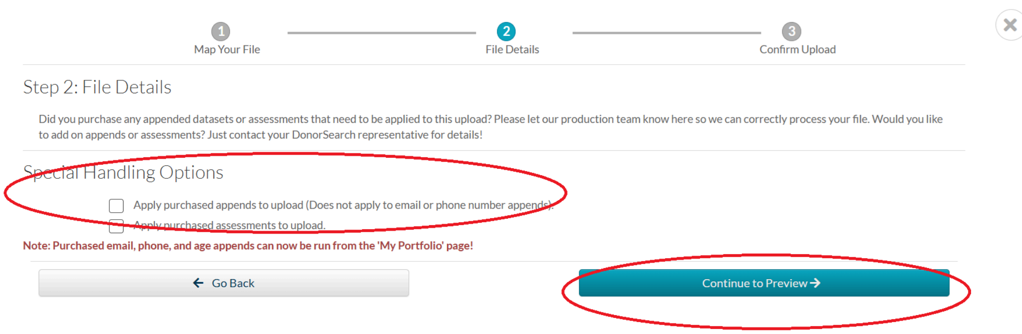
- A file description can be any description of the file. For example, “this file is missing a column and needs to be appended.”
- Special instructions can be used for non-standard files. For example, if you forget to include a column in your screening, you can upload a file of client IDs and the missing columns for our IT department to append. The special instructions would include the name of the original file that needed the column added. Keep in mind, your file must contain an ID in order to do this sort of file fix. Please reach out to your client success representative or **clientsupport@donorsearch.net** for additional assistance.

7. Click on “Upload file”.

8. For each field, confirm your file headers by confirming how you named each header with the data that DonorSearch is expecting in each header and click on “Continue to File Details”



9. If you have purchased additional appends select which ones by clicking on the boxes. If you have not purchased any additional appends leave these boxes blank. Click on "Continue to Preview".



10. The Confirm Upload Page will show a preview of your data. Confirm that the columns are ordered in the same way you selected during the mapping (for example, first name contains first names). Then hit approve and upload.