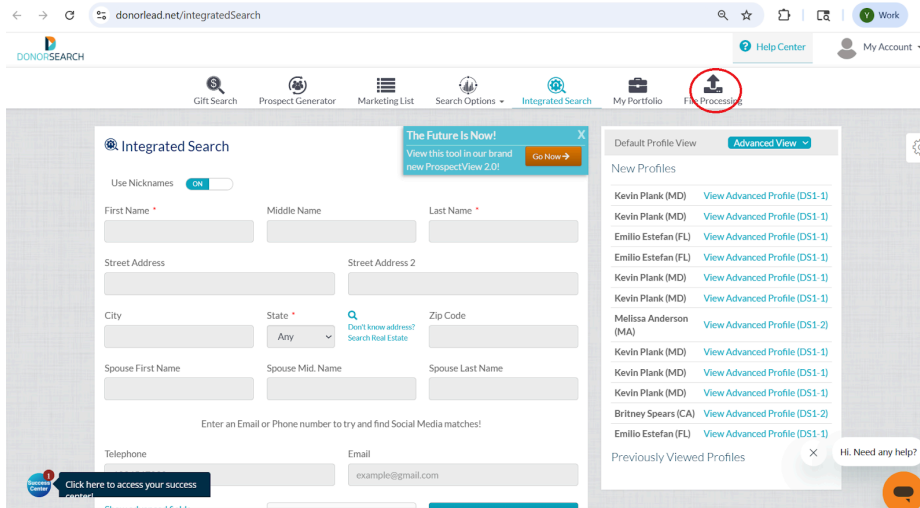


How do I upload my screening?

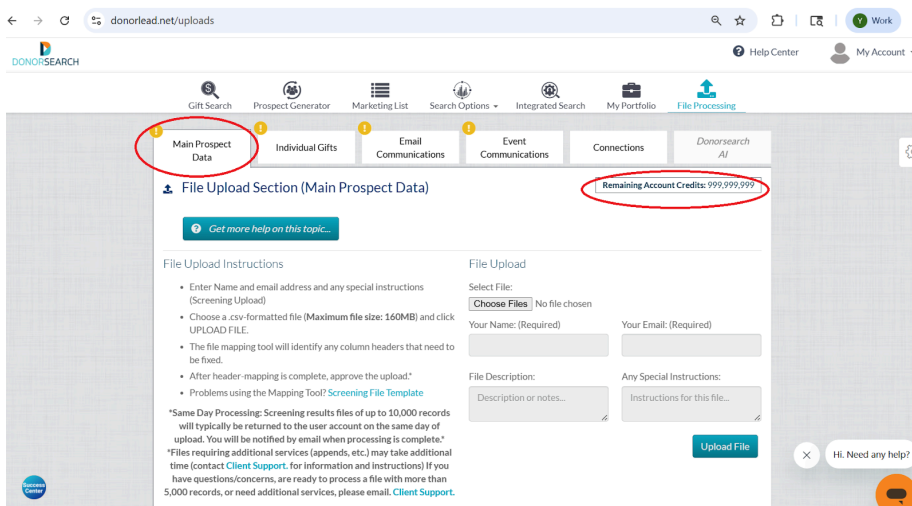
1. Log in to the DonorSearch Tool.
2. Select the “File Processing” icon at the top of the screen.

**** 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 ****



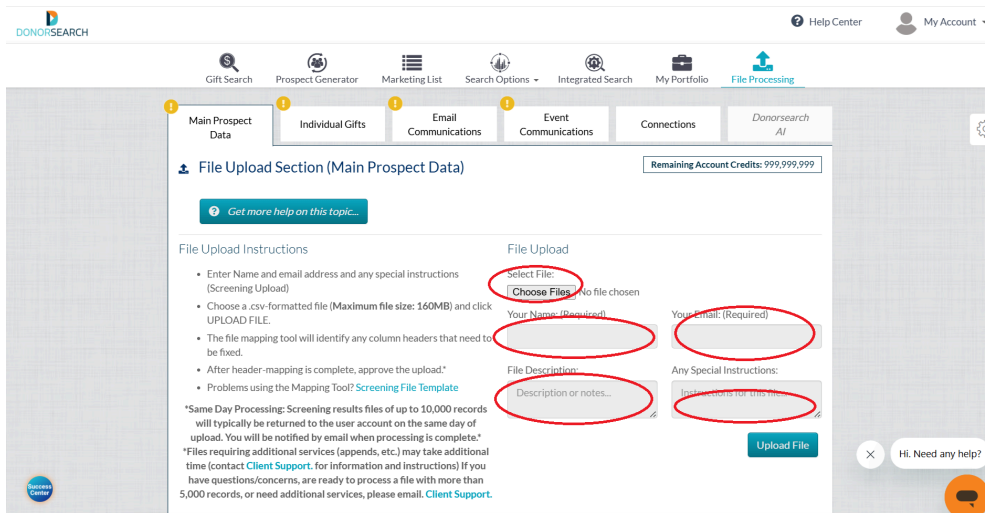
[Click here](#) to follow our guide on how to upload a screening file.

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”





1 Map Your File 2 File Details 3 Confirm Upload

Step 1: Map file headers

Can't map your file? [Submit your file for review](#)
*** This may incur a cost, payable prior to processing

Your first step is to "map" your file headers in your file to our pre-defined DonorSearch file headers. This will allow us to optimize our usage of your file, and drastically improve processing time! Be sure to scroll through the "File Heading" box to make sure you have accounted for all of your column headings. Don't worry, you can always preview your choices in step 2 before confirming your upload. Optionally, you can save your chosen layout to expedite future uploads!

Optional: Apply a premade file template to your uploaded file.

Select

[Load Selected Template](#)

[Delete Selected Template](#)

[Clear All Headers](#)

Your File Headers	DonorSearch Header
clientid	clientID
firstname	firstName
middlename	middleName
lastname	lastName
suffix	suffix

[Save As Template \(optional\)](#) Then... [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".

1 Map Your File 2 File Details 3 Confirm Upload

Step 2: File Details

Did you purchase any appended datasets or assessments that need to be applied to this upload? Please let our production team know here so we can correctly process your file. Would you like to add on appends or assessments? Just contact your DonorSearch representative for details!

Special Handling Options

Apply purchased appends to upload (Does not apply to email or phone number appends)

Apply purchased assessments to upload.

Note: Purchased email, phone, and age appends can now be run from the 'My Portfolio' page!

[Go Back](#) [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.

1 Map Your File 2 File Details 3 Confirm Upload

Step 3: Confirm Your File Layout

Now that you have mapped your file, view a portion of your file below with your new layout. If everything looks correct after scrolling both over and down through your file, you can press the "Approve & Upload" button to complete the upload process. Important: By pressing *Approve & Upload*, you are confirming that your file is correctly mapped and ready for import. Any modifications required by the DonorSearch production department are potentially subject to a separately billed charge, payable prior to processing.

clientID	firstName	middleName	lastName	suffix	age	DOB	address1	address2	city	state	zip	spouseFirst	spouseMiddle	spouseLast	spouseAge	spouseDOB	seasonalStreet
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[Go Back](#) [Approve & Upload](#) [Hi, Need any help?](#)

clientsupport@donorsearch.net

