



DonorBase® Data Submission Guidance

DonorBase has created this helpful guide to assist you in your data posts:

- What data does DonorBase need for my quarterly updates?
- What records should I be including or excluding?
- In what format should my data be delivered?
- How do I transfer my data to DonorBase?

The following offers guidelines for the data DonorBase needs – and the data DonorBase does not wish to receive – as part of your update and suppression file submissions.

[Providing Donor Data for DonorBase® Updates](#)

At a minimum, DonorBase needs to receive a copy of your active donor file, including all direct-response generated donors and their individual gift amounts and dates of donation.

There are two acceptable formats for providing the data:

[I. Consolidated Donor Name, Address, and Gift data \(gift amount and date\)](#)

The following fields marked with an asterisk are required (and all fields are desired) for update data submissions:

[Customer/Donor ID number*](#)

[Title/Salutation](#)

[First Name*](#) [Use either the first name and last name, or the full name. If both are provided, the full name takes precedence]

[Last Name*](#)

[Full Name*](#) [The full name may contain the title, first name, last name, and suffix. Providing either First and Last name fields, or the Full Name field, is acceptable (file does not have to contain both parsed and full name).]

[Primary Address*](#)

[Secondary Address*](#)

[City*](#)

[State*](#) [Send state abbreviations rather than full state names (i.e. “NJ” not “New Jersey”)]

[Zip Code*](#) [This may be supplied as a five digit Zip Code or a ten position Zip Code-Zip Plus 4]

[Phone Number](#) [If available, phone number must include the area code. Please provide as a dedicated field (not comingled with email or other data)]

[Email Address](#) [If available. Please provide as a dedicated field (not comingled with phone or other data)]

[Gift Date*](#) [Format should be MM/DD/YYYY or YYYY-MM-DD]

[Gift Amount*](#) [Format should be #####.## without commas or dollar signs. **Please note that the Gift Amount should always contain decimals.** Please remove zero dollar or negative dollar transactions.]

When providing all donor/gift data in one file, each gift should be recorded in a separate row.

For Example, when Jane Doe has given three times to your organization, her donor information would be represented as:

Title	First Name*	Last Name*	Full Name*	Primary Address*	Secondary Address*	City*	State*	Zip Code*	Phone Number1	Email Address1	Gift Date*	Gift Amount*
Ms.	Jane	Doe	Jane J. Doe	195 Alpha Avenue	Apt. 4	Jacksonville	FL	32202-1384	904-224-0349	janejdoe@samplenet.com	12/1/2015	25.00
Ms.	Jane	Doe	Jane J. Doe	195 Alpha Avenue	Apt. 4	Jacksonville	FL	32202-1384	904-224-0349	janejdoe@samplenet.com	6/6/2016	25.00
Ms.	Jane	Doe	Jane J. Doe	195 Alpha Avenue	Apt. 4	Jacksonville	FL	32202-1384	904-224-0349	janejdoe@samplenet.com	5/28/2017	30.00

➤ **Always provide a header record or layout for every file provided.**

II. Separate Name/Address and Transaction files

Donor Update data may also be submitted to DonorBase as two files (“master” donor/address file and gift/transactional files **linked together by a common Customer/Donor ID**).

When providing data in this format, DonorBase needs:

A) **Donor name and address file** (donor master file), providing a Customer/Donor ID number, Name, Address, City, State and Zip Code for each individual donor in conjunction with:

B) **Donor transactional file**, providing corresponding Customer/Donor IDs for each individual gift amount and gift date for all direct-response gifts made to the organization

When sending both master & transaction files, transactions must include Date & Dollar information along with a Customer/Donor ID number to link back to the master file.

The Master file needs to contain the Name, Address, City, State, and Zip Code as well as the unique Customer IDs of all donors (which serves as the Primary Key between the 2 files).

For example, your Donor Master (name and address file) would provide:

Donor_ID	Title	First Name*	Last Name*	Full Name*	Primary Address*	Secondary Address*	City*	State*	Zip Code*	Phone Number1	Email Address1
21782459	Ms.	Jane	Doe	Jane J. Doe	195 Alpha Avenue	Apt. 4	Jacksonville	FL	32202-1384	904-224-0349	janejdoe@samplenet.com
43106452	Rev.	John	Smith	John Smith	1302 Charter Street		Kansas City	KS	64106-8875	913-674-0421	revsmith@samplenet.org
661379	Mr.	David	Public	David Q. Public	4558 Lyon Avenue	#39	Rutland	MA	01543-6543	508-886-0508	davepublic@samplenet.com
22463626	Dr.	Teresa	Roe	Teresa P. Roe	791 Coburn Hollow Road		Monmouth	IL	61462-2254	309-457-0158	troe@samplenet.com
23427625	Ms.	Laura	Luna	Laura L. Luna	1701 Flinderation Road		Chicago	IL	60654-2453	708-322-5683	laural@samplenet.com

...while your Donor Transaction file would provide:

Donor_ID	Gift Date*	Gift Amount*
21782459	12/1/2010	25.00
21782459	6/6/2012	25.00
21782459	5/28/2013	30.00
43106452	12/30/2016	50.00
43106452	4/25/2017	50.00
661379	4/26/2016	15.00
22463626	10/27/2008	50.00
22463626	3/16/2009	50.00
22463626	5/18/2011	75.00
22463626	5/1/2015	50.00
22463626	8/9/2016	100.00
23427625	7/4/2014	40.00
23427625	6/1/2016	15.00
23427625	11/17/2016	20.00

Please note:

- All records intended for omission from cooperative marketing purposes (such as “Do Not Mail,” “Do Not Exchange/Trade,” “Do Not Solicit,” or “Deceased” flags) should be excluded prior to sending data to DonorBase.
- Only the Customer/Donor ID number needed for matching the name/address file to their corresponding transaction records should be provided. Please do not send alternative IDs (Account IDs, Gift IDs, etc.) that are not related to linking name/addresses to gifts as they can cause confusion with the matching process.
- Please combine files so there is only one name/address file and one transaction file each (not, for example, separate files for separate months). We do understand that extremely large files may need to be broken into several smaller files.
- ***Please note that DonorBase is unable to process client input data using custom instructions. Data must conform to the specifications outlined above.***
- Please only send files that are needed. When DonorBase receives unnecessary files we are susceptible to processing error (in addition to time spent clarifying the issue with you).
- Always provide a header record or layout for every file provided.

While DonorBase works with a minimum of L24M giving data (inclusive of all gifts made by these “active” donors, even if they go back further in time) most organizations prefer to send all donor data regardless of time frame.

DonorBase uses this data to more fully inform our modeling process and to offer lapsed re-activation segmentation services.

DonorBase expressly does not need, and refuses to receive, sensitive Personally Identifiable Information (including medical, educational, and financial or employment information, full date of birth, social security number, capacity rating, credit card numbers, etc.). In the event that DonorBase ever receives data of this type, our immediate response is to notify the sender and destroy all SPII data that does not conform to our work requirements.

To clarify, the data DonorBase needs to perform our work is donor name and address, and donation gift and date data. It is crucial that DonorBase not receive any sensitive PII or SPII data, nor for DonorBase to take responsibility for any PII or SPII data.

While DonorBase eliminates any data subjects that could be part of the European Union’s General Data Protection Regulation (GDPR), our members must undergo a similar process to ensure they comply with the tenets of the regulation before providing their data to DonorBase. It is the member’s responsibility to ensure they filter out any GDPR data subjects prior to sending it to DonorBase. While DonorBase will not accept any data that contains non-US addresses, clients should consider DonorBase’s processing as a second layer of filtering, and ensure GDPR data does not get sent to DonorBase at all.

[Providing Suppression Data to DonorBase®](#)

Suppression Data represents all records that you want DonorBase to omit from the prospect files we produce for your mailings.

Suppress files may include records such as (but not limited to):

- Board Members
- Chronic Non-Responders
- Deceased
- Do Not Exchange / Do Not Share / Do Not Trade
- Do Not Mail
- Do Not Solicit
- Eliminator / “Kill” Files
- Employee / Organization Omits
- Exclusions
- Inactive Accounts
- Lapsed Donors
- Major Donors
- Nixies
- Non-Direct Mail Donors
- Removals (“Remove Me”)
- Seed Names
- Time-Restricted Solicitations
- Volunteers

Please note -- your Suppression Data needs to be consolidated and submitted as one file for submission to DonorBase.

Submitting multiple suppression files (requiring DonorBase data preparation) will incur processing charges.

[Transferring Data to DonorBase®](#)

Each DonorBase member is assigned a dedicated and unique secure file transfer protocol (“SFTP”) site for secure data transfer to DonorBase.

The connection protocol for DonorBase data transfers is:

Host: **sftp.donorbase.com**
UserID: [provided by your DonorBase representative]
Password: [provided by your DonorBase representative]
Port: **22**

Please note that you cannot use an internet browser to transfer data via SFTP. Many DonorBase members use a SFTP file management tool (such as FileZilla – download at <https://filezilla-project.org/>) to facilitate their file transfers.

Please contact your DonorBase representative for access to your credentials. We’ll be happy to assist you with the process or help with any issue you may be encountering!

[DonorBase® Update Schedule](#)

DonorBase updates on a quarterly basis. The following are the upcoming data cut-off dates for submission of your update/suppression data:

DonorBase Data Submission Cut-Off Date	Data is Available for Order Processing
Thursday, March 15th, 2018	May 2018
Friday, June 15th, 2018	August 2018
Friday, September 14th, 2018	November 2018
Friday, December 14th, 2018	February 2019

Please plan appropriately based on the schedule above. When you need your data to be used in DonorBase for order production, we must receive it by the corresponding cut-off date to be able to apply it during your order fulfillment process.

When DonorBase processes file submissions occurring outside of this update schedule (“ad hoc” file submissions) you will incur a charge for the processing of the data.