

*DonorScape® Prospect Intelligence
Webcast Series – Export All*



GG+A

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Objectives



- + How to run an “Export All”
- + How to convert text files into Excel
- + Three example scenarios

3 Scenarios



Scenario 1: Those who have given \$5,000 or more to similar organizations.

+ DataSource: VeriGift (category and low gift range)

Scenario 2: Those with real estate valued over \$1 million.

+ Data Source: LexisNexis (total assessed value)

Scenario 3: Prospects who sit on nonprofit or corporate boards.

+ Data Source: GuideStar Public and GuideStar Private

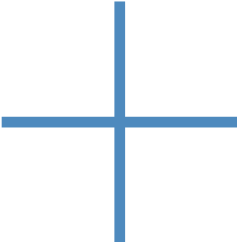
Data Sources



Export All File Name	Data Source	Description
corptech	CorpTech	Tech business profiles
director	Waltman Director	Board participation (on records screened prior to Sep 2016)
dnb	Dun & Bradstreet	Business and executive information
donor	Waltman Donor	Philanthropic giving (on records screened prior to Sep 2016).
edgarHoldings	EDGAR SEC Insiders	Current holdings among public company insiders
edgarTransactions	EDGAR SEC Insiders	Insider trader transactions
fec	FEC	Federal election campaign contributions
gsPrivate	GuideStar Private	Participation in private foundations
gsPublic	GuideStar Public	Participation in public charities
larkspur	Larkspur SEP/Keogh	Pensions
lexisNexis	LexisNexis	Real Estate
marquis	Marquis Who's Who Biographies	Occupation and education
marquisText	Marquis Who's Who Biographies	Extensive biographical details including memberships, awards, civic info, achievements, positions held, and military info.
prospect	GGA codes	Gift capacity rating and predictive modeling codes if applicable
reuters	Market Guide Insider Profiles	Public company leaders including biographical, company, and compensation
supplemental	Your data	Prospect details submitted from your database including giving, relationships, solicitors, and client defined fields
veriGift	iWave's VeriGift	Past charitable giving data (on records screened after Sep 2016)

More detailed information on DonorScape's data sources is available on the [Support Website](#)

Excel Text Import Wizard



+ Step 1

The screenshot shows the Microsoft Excel ribbon with the 'Data' tab selected. The 'From Text' option under the 'Get External Data' group is circled in red. A tooltip for 'Get Data From Text' is visible, stating 'Import data from a text file.' The spreadsheet grid below shows columns A through R and rows 1 through 18. A green selection box is present in cell K3.

Excel Text Import Wizard



+ Step 2

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

- Delimited - Characters such as commas or tabs separate each field.
- Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 File origin: 437 : OEM United States

My data has headers.

Preview of file C:\Users\tkats\Desktop\DonorScape\Marketing\Blogs a...\director_4201_20225.txt.

	prospectid	d_role	d_company	d_category	d_location	d_state	d_name	matchCod
1								
2	1037	College Trustee	Syracuse University	Higher Education	Syracuse, NY	NY		
3	1037	Met. Life Ins., Dir. of State Planning	Audrey Cohen College	Higher E				
4	1072	Volunteer	Henry Street Settlement	Human Services and Social Services				
5	1193	Pawtucket Fasteners, President	Rensselaer Poly. Tech.	Higher Educati				

Cancel < Back Next > Finish

Excel Text Import Wizard



+ Step 3

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

- Tab
- Semicolon
- Comma
- Space
- Other: |

Treat consecutive delimiters as one

Text qualifier: " ▾

Data Sources

prospectiveid	d_role	d_company
1037	College Trustee	Syracuse University
1037	Met. Life Ins., Dir. of State Planning	Audrey Cohen College
1072	Volunteer	Henry Street Settlement
1193	Pawtucket Fasteners, President	Rensselaer Poly. Tech.

Cancel < Back **Next >** Finish

Excel Text Import Wizard



+ Step 4

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

General
 Text
 Date: MDY
 Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

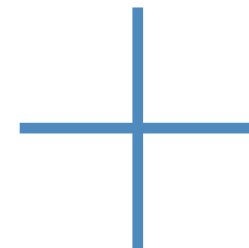
Advanced...

Data preview

General	General	General
prospectid	d_role	d_company
1037	College Trustee	Syracuse University
1037	Met. Life Ins., Dir. of State Planning	Audrey Cohen College
1072	Volunteer	Henry Street Settlement
1193	Pawtucket Fasteners, President	Rensselaer Poly. Tech.

Cancel < Back Next > Finish

Resources



DonorScape Support – Data Sources

<http://support.donorscape.com/DonorScape%20Wealth%20Screening%20Data%20Sources.pdf>

Microsoft – Text Import Wizard

<https://support.office.com/en-us/article/text-import-wizard-c5b02af6-fda1-4440-899f-f78baf41857>

Tax Assessor Database

<http://www.pulawski.net/>

Guidestar – Public Charities and Private Foundations

<https://trust.guidestar.org/just-what-are-public-charities-and-private-foundations-anyway>