

CDP NRF Data File Requirements – Generic CRM



Donor File Fields

Account ID	Middle Name 2	Country
Account Category	Last Name 2	From Date
Account Status	Suffix Name 2	Through Date
Membership Expiration Date	Email 1	Telephone Type
Affiliation	Email 2	Telephone Number
Name 1	Employer 1	Do Not Mail Flag
Title 1	Employer 2	Do Not Email Flag
First Name 1	Address Type	Do Not Phone Flag
Middle Name 1	Address Line 1	Do Not Exchange Flag
Last Name 1	Address Line 2	Do Not Thank Flag
Suffix Name 1	City	Survey Response Flag
Name 2	State	Planned Giving Status
Title 2	Zip	Volunteer Status
First Name 2	Zip Extension	Event Status

Transaction File Fields

Account ID	Soft Credit Type	Matching Company ID
Gift Date	Fiscal Month	Pledge Number
Gift Sequence	Fiscal Year	Affiliation
Pledge Amount	Activity	Event
Payment Amount	Campaign	Installment Amount
Transaction Type	Initiative	Payment Frequency
Gift Kind	Effort	Source Code
Gift Type	Fund	Source Category
Technique	Fund Type	Premium
Payment Method	List	Premium Category
Payment Category	Program	Date Premium Sent

If your station is currently using Allegiance, Memsys, Raiser's Edge, or ROI Solutions as a CRM, please refer to their respective 1-sheets for more information.

For additional information on this generic file structure, layout, and content, please reach out to us at data@cdpcommunity.org.