Work Order Direction for DP

**GENERAL**

DP needs to know:

* If there are mixed cases and how to correct
* If there are soft returns
* If there are multiple addressing fields (beyond normal Add1/Add2), which to use
* If there are multiple name fields, which to use
* Which codes to include
* If we instruct to “Load all fields,” indicate why (for returning final mail file to client)
  + NOTE: It is MUCH more difficult and time consuming to retain original column names if not necessary
* It is preferred to indicate “Load all fields needed for addressing” or “Load all fields needed for merge”
  + NOTE: The names of the variable fields in your variable merge sample document should match the column names in the list
* It is not necessary to list each field individually unless the list has excessive columns and it is unclear which fields would need loading.

**BY FIELD**

NAME: DP automatically checks if first name AND last name are blank and there is no Business/Organization name and will remove it.

Unless it is a merge, it is not necessary to indicate that First Name or Last Name are blank (if only a handful of records. Use your judgement based on list size).

If a record had “Joe” in the first name field, and no last name, it would NOT be corrected and would mail as “Joe.” Know your client. If they would like this corrected, they must fix the list.

TITLE, PREFIX, SUFFIX: If they are present in the list, they will be loaded unless you indicate otherwise.

ADD1/ADD2: DP automatically checks if all address fields are blank and will remove it.

If there are additional addressing fields necessary to use, please indicate.

CITY: Indicate if it contains information other than a city.

STATE: Indicate if state names are spelled out. Mail Manager will only pull in the first two letters of the state field starting from the left. (Ex: “Maine” would pulled in as MA, Massachusetts).

Not necessary to indicate if there are periods or lower cases.

COUNTRY: Field is not necessary if all domestic.

FOREIGN: When foreign is loaded into Mail Manager, City, Province and Zip are all loaded into one field so that errors can be more easily caught.

Therefore, it is not necessary to indicate if there are foreign provinces in any of those fields.

Canadian records do NOT need to have “Canada” in country field, as DP recognizes Canadian provinces.

Other foreign MUST have a country in the Country field. Indicate if it is located in another field, but usually need to request the correction from the client if it is missing.

**MERGE RELATED:**

Always indicate which records receive the Donor/Non Donor/Other applicable versions, unless the list has a coded field that gives explicit direction. For example, if a record with a last gift amount of $0.99 is to be treated as a non donor.

If using Standard Five Maples Ask String Table, not necessary to indicate who receives acquisition string, unless there are additional criteria out of the ordinary.

Please provide direction for formatting Ask Strings and Last Gift Amount.

* DP standard is to NOT include decimals in Ask Amounts (Ex: $X,XXX), but to include decimals in Last Gift Amount ($X,XXX.XX)