*donor*Centrics™ Data Request for American Red Cross Chapters

General Guidelines

Our goal is to simplify this process for you while efficiently interpreting and analyzing your data. In general we need two files from your chapter. Each of these files is described in detail below, but the requirements can be summarized as follows:

1. A file with name, address and phone information for all donors of all types.
2. A file with the transaction/giving history for all of these donors.

PLEASE NOTE:

- **An account ID must be included with each record in both files**. This is the mechanism for linking the donor account to the gifts associated with each account.
- **The transaction file must contain one record/row per individual gift transaction**.

FORMATTING

- Send your data in a flat file that is either fixed-width or comma-separated (.txt or .csv files).
- Use a 4-digit year format for all data fields (e.g., DD-MM-YYYY, YYYY/MM/DD, etc.).
- Be sure each record/row ends with a carriage return.

ADDITIONAL DOCUMENTATION

- Please send layouts or a header row for both your files. If your file includes field labels that are non-descriptive (e.g. “attribute1”), provide definitions for the field names
- Please provide definitions for codes, especially source and fund codes. If applicable, please also provide translations for values in a particular field (e.g. an “N” in the “mail code” field = not solicitable).

If you have any questions, please contact surveysupport@targetanalysis.com. If you are unsure about whether Target will need a particular field, please **include it anyway**. It is easier for us to ignore a field than for you to create another file if we are missing a field containing important data.

All information provided by you will be kept in strictest confidence and will not be disclosed to anyone outside of Target Analysis Group without your express written consent.

File 1: Account-Related Data

The account-related file should contain ALL donors on your system, including lapsed and deceased donors. Transfer all account-related information in ONE file, with as many of the following fields as you have data for. Select ALL records going back as far as you can:

- **Account Id** — ID number unique to each donor
- **Full Name** — *e.g., Tim Barton, or, if applicable, Mr.Tim Barton & Mrs. Susan Barton*
- **Address** — *e.g., 50 Washington Avenue N., Apt. 3*
- **City**
- **State**
- **Zip Plus 4**
- **Address Type** — Indicate whether address provided is home or business
- **Home Phone** — Include area code
- **Email Address** — If available
- **Donor Status** — *e.g., D = Deceased; A = Active; L = Lapsed*
- **Donor Type** — *e.g., Individual, Corporation, Foundation*
- **Suppression Flags** — *e.g., No Mail, No Phone, No Exchange, Major Donor, Board Member*
- **Chapter Code**

File 2: Transaction-Related Data

Include all historical gift information in this file. Select all records on the database as of today's date. Include as many of the following fields as are applicable. IMPORTANT: This file must contain one record per individual gift transaction. Please provide a list of source types and a description of how to interpret your source codes. Please contact ftpsupport@targetanalysis.com with any questions.

IMPORTANT: Your transaction history download should contain one record per individual gift transaction. Please include the following:

• **Account ID**	Must correspond to Account ID in donor information file.
• **Payment Date**	Date field with year in 'YYYY' format. Please exclude timestamps.
• **Payment Amount**	Please format without $ signs or commas.
• **Transaction Type**	Codes distinguishing between pledges, pledge payments and outright gifts. On some systems may also indicate matching gifts, soft credits, etc.
• **Source Type/Vehicle**	Origin of the gift. e.g., Mail, Telemarketing, Events, Workplace Gift, Internet
• **Source Codes**	Complete source code; may identify a specific package, technique, etc.
• **Gift Type**	e.g. new, renewal, additional, rejoin
• **Pledge ID/Installment ID**	If applicable; ID field to link pledge payments made on a particular pledge or installment series.
• **Installment Indicator**	Indicates if a gift is an installment toward a larger pledge.
• **Soft Credit Flag**	Indicates whether payment amount is a hard or soft credit. Optional if already indicated by Transaction Type, or other field.
• **Soft Credit Amount**	On some systems, soft credits are indicated by a memo credit or associated credit field in the same record as the legal ("hard") credit. Please include all credit amount fields if applicable.
• **Matching ID**	Links an individual donor's gift record with a sponsor's matching gift record. Optional if already indicated in Relationship Code field or other field.
• **Relationship Code**	Code or id field linking hard- and soft-credited gifts, gifts from spouses, matching gifts, etc.
Fund Code	If applicable, the designated use for the money: e.g., IRF, DRF, Biomed, AFES, local disaster, or unrestricted.