

Local Data Request
General Guidelines

Target requires two files from your organization in order to produce the standard line of TARGET ANALYTICS products. 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, AND:**
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. We use this field to link the donor account to the gifts associated with each account.

The transaction file must contain one record per each 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 (DD-MM-YYYY, YYYY/MM/DD, etc.).

Be sure that each record 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 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 ftpsupport@targetanalysis.com. If you are unsure about whether Target Analysis will need a particular field, **please include it anyway**. It is easier for us to ignore a field than for you to create and send another file if we are missing important data.

All information provided by you will be kept in strictest confidence and will not be disclosed to anyone outside of Target Analytics 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. You may also choose to include prospects and other non-donor populations. Please contact ftpsupport@targetanalysis.com with any questions.

Fields highlighted in red **must be included** for every client and every product. Non-highlighted fields may vary depending upon your organization's specific needs and practices. Include **as many** of the following fields as you can.

Account ID	<i>ID number unique to each donor</i>
Full Name	<i>e.g., Tim Barton, or, if applicable, Mr. Tim Barton & Mrs. Susan Barton</i>
Address	<i>e.g., 50 Washington Avenue N., Apt. 3. Use home address whenever available</i>
City	
State	

Zip Plus 4	
Address Type	<i>indicate whether address provided is home or business</i>
Email Address	
Donor Status	<i>e.g., Deceased; Active; Lapsed</i>
Donor Type	<i>e.g., Individual, Corporation, Foundation</i>
Suppression Flags	<i>e.g., No Mail, No Phone, No Exchange, Major Donor, Board Member</i>
No Premium Request	<i>if applicable; identifies any donor who has requested not to receive premiums. May be included with suppression flags.</i>
Chapter Code	<i>if applicable</i>
Affinity Code	<i>indicates donor has an additional connection to your organization: e.g., Volunteer, Employee, Disease Survivor. If not indicated elsewhere in your file, please include identifiers for volunteers & board members in particular.</i>
Prospect Flag	<i>flags prospective donors who have not yet given</i>
Planned Giving Flag	<i>flags donors who have promised planned gifts, and/or donors who have requested information or otherwise expressed interest in planned giving to your organization.</i>

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.

Fields highlighted in red **must be included** for every client and every product. Non-highlighted fields may vary depending upon your organization's specific needs and practices. Include **as many** of the following fields as you can.

Account ID	<i>must correspond to Account ID in donor information file</i>
Payment Date	<i>date field with year in 'YYYY' format. Please exclude timestamps.</i>
Payment Amount	<i>please format without '\$' signs or commas</i>
Transaction Type	<i>codes distinguishing between pledges, pledge payments, and outright gifts. On some systems this field may also indicate matching gifts, soft credits, etc.</i>
Source Type	<i>origin of the gift, e.g., Mail, Telemarketing, Events, Workplace Gift, Internet</i>
Source Codes	<i>complete source code; may identify a specific package, technique, etc.</i>
Premium Flags	<i>indicates if a premium gift was sent to donor (either front or back end)</i>
Gift Type	<i>e.g. new, renewal, additional, rejoin</i>
Pledge ID/Installment ID	<i>If applicable; ID field to link pledge payments made on a particular pledge or installment series</i>
Installment Indicator	<i>indicates if a gift is an installment toward a larger pledge</i>
Soft Credit Flag	<i>indicates whether payment amount is a hard or soft credit. Optional if already indicated by Transaction Type, or another field</i>
Soft Credit Amount	<i>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.</i>
Matching ID	<i>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.</i>
Relationship Code	<i>code or id field linking hard- and soft-credited gifts, gifts from spouses, matching</i>

	<i>gifts, etc.</i>
List Code	<i>if not included in source code</i>
Restricted Gift Code	<i>if applicable, the designated use for the money; e.g. restricted, unrestricted, particular campaign, PAC gift</i>
Payment Method	<i>e.g., Cash, Check, Credit Card, EFT, Payroll Deduction</i>
Gift ID	<i>unique identifier for each gift</i>