:: List Cooperative
Data Submission Guide
Submission Deadline: May 14, 2010

TRG
ARTS

Data Submission

Thank you for participating in the Houston List Co-Op. The List Co-Op provides you with tools and capabilities that will help you market better and smarter while saving time and money.

Target Resource Group (TRG) has designed this guide to help you make the most of your participation in the List Co-Op and guide you through the process of organizing, preparing, and delivering your data for submission. In the following pages, please find:

- Step by Step Guide to Data Preparation & Submission
- Frequently Asked Questions
- Appendix of Buyer Type Codes
- Template for Data Submission (attached excel spreadsheet)

For questions regarding any step of the **Data Submission Process**, please contact your TRG representative:

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Data Preparation & Submission Step by Step Guide

Step #1 - Take Inventory of your Lists / Segments

Think about the various types of “lists” you have, considering the past several seasons or memberships cycles and where they are housed. Remember that including all available lists will give you greater ability to use the system. Any list you provide can also be tagged as Not Allowed for Trade after upload to eMerge so only your organization has access to it. Some of those types of lists include:

- Subscribers
- Members
- Ticket Buyers / Admission
- Donors
- School students
- Volunteers
- Prospects and Inquiries
- Board Members
- DO NOT MAIL
- DO NOT PHONE
- DO NOT EMAIL
- DO NOT TRADE

Patrons in segments with the Do Not Trade, Do Not Mail or Suppression buyer types are the only records suppressed (excluded) from every trade you approve. While you can hide lists (segments) from view to other organizations, patrons on these lists are suppressed individually, regardless of the other lists on which they are included.

Step #2 – Pull your data

Now that you have a sense of what types of lists / segments you have and can submit, here is a list of the required and optional data fields to pull for each segment. A template has been provided for your reference. **Please note that TRG can only accept ONE file (single tab in MS Excel, one text file, etc) per organization; that file can have as many segments or records as needed to fully represent the organization’s patronage.**

Required Fields:

- ORG: Organization ID for eMerge given to you by TRG (found in the participant contact information sheet in eMerge; Not required for new members)
- TYPE: Buyer type for the transaction (See the attached Appendix for codes)
- YEAR: Fiscal year of transaction (2009, 2008)
- DESCRIPTION: The name of the segment as it should appear in eMerge (08-09 STB: Nutcracker, 2009 Donor: Annual Fund)
- LAST: Last name of patron
- FIRST: First name of patron
- ADDRESS 1: Address of patron
- ADDRESS 2
- CITY
- STATE
- ZIP

Accepted Fields:

- PREFIX
- SUFFIX
- COMPANY
- HOME PHONE (*can’t be traded, but will be available for your internal lists*)
- BUSINESS PHONE (*can’t be traded, but will be available for your internal lists*)
- EMAIL (*can’t be traded, but will be available for your internal lists*)
- PATRON ID * (*Patron IDs may be stored in eMerge. However, they will not be used in de-duplication of your file. The Patron ID field is simply retained for use by member organizations*)

Step #3: What File Format to use

As your List Co-Op service provider, TRG can accept most electronic file formats including:

- Microsoft Excel (.xls)
- Microsoft Access (.mdb)
- Text Format or Comma Delimited (.txt or .csv)

Step #4: Submit your data to TRG

1. Name the file you are submitting with your Org ID and Organization Name (ie: 123 – The Theatre)
2. Go to www.trgarts.com
3. Click on the link "**Client Login**"
4. Select the "**File Transfer**" from the pull-down menu and enter the following:
    a. Username: **HAA**
    b. Password: **HAA2008**
5. Click "**Login**"
6. On the Upload section, select "**New File**"
7. Fill in the upload form:
    a. **Your Name**
    b. **Your Organization:** Organization sending the file (NOT HAA)
    c. **Your Title**
    d. **Your Email**
    e. **Your Phone Number**
    f. **File Name**
        i. **Step 1:** Click the browse button on the right to open a "**Choose File**" wizard
        ii. **Step 2:** Browse your hard drive, highlight the file and click "**Open**"
    g. **File Description:** Name of the file (example: 2010 Organization X Database)
    h. **Record Count:** Record quantity of uploaded file
    i. **Confirmation E-mail:** You can add additional e-mail addresses to receive a confirmation message on TRG's receipt of the file, (the email provided under Your Email will automatically be included).
    j. Click the "**Save**" button and wait for the server to upload the file

NOTE:

Due to the number of member organizations submitting data for the Co-Op TRG is not accepting data via email.

Frequently Asked Questions

Where do I find my Org ID?
Your Org ID can be found in the upper left corner after logging into eMerge (next to your name and organization).

I'm new to the Co-op – how do I get my Org ID?
New members do not have to provide an org ID in their submission. You may leave that field blank for population by our team.

Why must I submit Buyer Type, Year, and Description fields?
These three key fields provide important labels for segmenting data. When you have these fields in view, you can develop strategically targeted lists and trade requests. These key fields also allow TRG to segment your data and provide us with a view of how you would like to see your data in eMerge. Without these fields, we have no way of knowing proper segmentation and you risk losing the opportunities for good strategic segmentation.

How will I know what the Buyer Type, Year, and Description fields should be?
Your organization can determine the best method for you. However, we strongly advise using a consistent naming convention for every update. If you have data already in eMerge, please refer to the Manage Lists tab to see how your data is currently segmented. This will allow you to determine what lists should be resubmitted to refresh data and also provide you with the current naming convention.

My year is actually a season, what year should I use?
For the Year in your segmentation, we recommend using the fiscal year associated with your data. For example, if Show X was done in December of 2008, but was a part of the 08-09 season, it should be labeled as 2009. We further recommend that you include the full season name as a part of the description field (ie: 08-09 STB: Nutcracker).

Should I include Patron ID numbers in my data submission?
Some organizations employ patron ID numbers as an important part of their patron history files; other organizations do not. Please know that if you send patron IDs, they will be retained, but will NOT be used in the de-duplication of your mailing or email lists. They will simply be stored in the system for use by the submitting member organization.

Why would I send my Patrons IDs?
If you do have unique Patron IDs (see question above), you should send those IDs with your submission. Having these IDs will help you quickly update your resident system after NCOA cleanings. Additionally, these IDs are used as a first process in de-duplication and merge/purge (followed by address matching). Patron IDs are also helpful to many organizations when pulling internal lists from eMerge in order to indicate who was mailed within their internal database.

Many of my patrons purchase more than one package or ticket from my organization. How do I represent their buying history accurately?
TRG views history by transaction, not by patron. This means that each record (row in Excel) is an individual transaction. Should a patron purchase more than once, please simply include multiple records (rows) to indicate this. For example, if Jane Smith purchased a single ticket to Nutcracker and a single ticket to Giselle, she would have two records (two rows in excel), both in the STB Trans tab. The distinguishing difference in these two transactions would be the buyer

type, year, and description (STB / 2010 / 09-10 STB: Giselle); everything else in the record would be identical biographical information for Jane Smith.

Why is it important that I send my suppression (Do Not Mail, etc) segments?
It is impossible to know who ***not to mail*** if they are not in your database as a suppression list. You need that suppression list to exclude from every trade with another organization as well as every list you pull for your own direct marketing all the households that have told you: Do Not Mail to me.

How much of my data should I submit to the List Co-Op?
We recommend that you treat the List Co-Op as your own online data warehouse and send *ALL* the data you have available on all patrons and their transactions to the List Co-Op. The more data you put into the List Co-Op, the more control, marketing intelligence, and savings you will get out of it.

Why would I do that?
Only with complete data *IN* the List Co-Op can you expect maximum benefits *OUT* of it. The more data you have in; the more control that you have. *(Note: This should also include people you "don't" want to receive mail so that they can be removed from lists you trade for. See importance of suppression lists).*

All of my data? Really?
Yes. Your data is safe and 100% in your control in the List Co-Op.

- Your data is housed in a separate secure server; there are no unauthorized users.
- You decide which segments of your data are hidden, so only you know they exist, and which are available for trade. However, remember, you must have at least one segment available for trade in order to participate in the program.
- *Your permission is always required for any trade* – yours is the last word on who uses your lists, what portions of data they may use, and when.

Do I have to?
No, but we do encourage it. By contributing more it will help you:

- Identify "super patrons" in your community – TRG's national patron behavior research says that the more patrons buy, the more they keep buying.
- Use List Co-Op data intelligence to choose the most responsive lists for your offers.
- Easily include and access your "do not contact" lists
- Access demographic and geographic information to better target your mailings.

Is it possible to trade email address within eMerge?
No. TRG feels strongly that it is a bad business practice to trade email addresses of patrons. It is against industry standards and best practice. Because of this, if you have a traded list in your order, that list cannot be downloaded with email addresses. You will, however, be able to download your own patrons' email addresses through eMerge for your own use.

I'm trying to submit my list, but my login isn't working – why?
The file transfer password is NOT the same as your eMerge login and password. As the file transfer password differs by community, make sure to note what your login and password are.

Appendix of Buyer Type Codes

Please use the codes listed below. If you need an additional code, please contact TRG in advance of submitting your data.

Buyer Type	Definition	Special Note
DNC	Do Not Call	
DNE	Do Not Email	If you are creating an email list in eMerge, the Do Not Email list will automatically be added to your cart as a suppression.
DNM	Do Not Mail	I If you are creating a mail list in eMerge, the Do Not Mail list will be automatically added to your cart as a suppression. This is also automatically suppressed against behind the scenes if someone else is requesting your segment.
DNT	Do Not Trade	Automatically suppressed against behind the scenes if someone else is requesting your segment.
SUP	Suppression	A buyer type of SUP will mark a list as an automatic suppression for any order created. This is also automatically suppressed against behind the scenes if someone else is requesting your segment.
ADM	Admission	
ALL	All House	
ART	Art Gallery	
CLA	Class	
CMP	Complementary	
DEM	Demographic Rental	Demographic List Rental
DON	Donor	
EDU	Education	
EMA	Email List	
GEN	General	
GRP	Group	
MAG	Magazine, Catalog & Other	
MAI	Mail Code	
MEM	Member	
PRO	Prospect	
REN	Venue Rental	This is when a venue is rented out. NOT a List Rental.
RFL	Raffle	
STB	Single Ticket Buyer	
SUB	Subscription	
SUR	Survey	
TRA	Trade	
VOL	Volunteer	