

Best practices in marketing require keeping your database updated constantly throughout the year. Having up-to-date patron and transaction information in your Community Database eMerge file allows you optimal strategic list segmentation for carefully tailored offers. For example, with frequently refreshed data you can suppress out patrons who have already purchased prior to sending new offers for a particular program. Or, you can contact those that have most recently patronized your organization and invite them to come back.

Recognizing the value to you of having current data at your fingertips, TRG has created a pricing structure that offers members of the HAA Community Database to refresh their data whenever they wish at a very low cost.

<b>Number of Unique Households in the Database</b>	<b>Cost per file</b>
Less than 15,000 patron household records	\$100
More than 15,000 patron household records	\$250

While this special per-file pricing requires your adherence to very specific data submission guidelines outlined on page 2, the opportunities afforded by frequent updating will be well worth undergoing the process.

Please find on the pages noted below details for preparing your data for interim submission to TRG.

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Should you have questions or would like assistance, please contact TRG.

TRG Contact:

Katie Schirmer  
Associate Consultant  
[kschirmer@trgarts.com](mailto:kschirmer@trgarts.com)  
719-494-4963

### File Layout and Required Fields:

In order to keep your per-file cost of interim updates low, TRG is only able to accept data in one specific format. Please prepare your update submission to include all required and accepted fields – no more or less – in one of the four specified formats. A template has been provided for your convenience. **If you are unable to provide the data as outlined here, please contact TRG for pricing. We will quote an individualize price for your update based on the size and means of your planned data update submission.**

#### Required Fields:

- ORG: Organization ID for eMerge given to you by TRG
- TYPE: Buyer type for the transaction (SUB, STB, MEM, DON, etc)
- 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
- BUSINESS PHONE
- EMAIL
- PATRON ID \*

Patron ID numbers are only to be submitted to eMerge if they are certified as unique to one patron. Patron IDs should only be derived from your RESIDENT box office, ticketing, or donor management system. If you have multiple systems providing Patron IDs, please contact your TRG representative for advice on submitting this data. By providing Patron IDs, you assume the risk that if these IDs are not unique, patron information may be overwritten with new data. If the data you are supplying does not meet this criterion, remove all Patron ID numbers.

*No other fields will be accepted. Please remove all extra data from your file prior to submitting it to TRG.*

## File Format:

File Formats Accepted (you must provide your list to TRG in one of these formats):

- Excel (.xls)
- Access (.mdb)
- Comma Separated Values (.csv)
- Text (.txt)

The low TRG interim update price is a per-file cost. You may have multiple segments in one file (denoted by the Type, Year, and Description fields) and the files can be as large as the format will accommodate. However, if you send multiple files (even if they are small files), you will be charged for each file you send.

All files submitted will be appended (added on) to the data already in eMerge; if there is no current segment for the data you are submitting, a new one will be created. However, if you are interested in *replacing* any files in your data, please contact TRG directly prior to submission as special instructions and additional cost may be necessary.

## Submission Process:

- Log on to [www.trgarts.com](http://www.trgarts.com)
- Click on the link “**Client Login**”
- Select the “**File Transfer**” from the pull-down menu and enter the following:
  - Username: **InterimUpdate**
  - Password: **community**
- Click “**Login**”
- On the Upload section, select “**New File**”
- Fill in the upload form:
  - **Your Name**
  - **Your Organization:** Organization sending the file
  - **Your Title**
  - **Your Email**
  - **Your Phone**
  - **File Name**
    - **Step 1:** Click the browse button on the right to open a “**Choose File**” wizard
    - **Step 2:** Browse your hard drive, highlight the file and click “**Open**”
  - **File Description:** Name or description of the file (example: Feb 09 Interim Submission)
  - **Record Count:** Record quantity of uploaded file
  - **Confirmation E-mail Distribution List:** Additional e-mail addresses (the email provided under Your Email will automatically be included) to receive a confirmation message on TRG’s receipt of the file
  - Click the “**Save**” button and wait for the server to upload the file