New Member Submission Guide

TRG
ARTS

Welcome to your area's community database! Participating in a community database provides you with the tools to effectively execute targeted marketing campaigns, while saving time and money.

This material will 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
- Template for Data Submission (attached excel spreadsheet)
- Sample for Data Submission (attached excel spreadsheet)

New members have the opportunity to join the community database every eight weeks. Data must be submitted by the deadline in order to be live in eMerge on the corresponding date.

Submission Deadline	Data Live in eMerge
12/2/2011	12/21/2011
2/3/2012	2/22/2012
4/6/2012	4/25/2012
6/1/2012	6/20/2012
8/3/2012	8/22/2012
10/5/2012	10/24/2012
11/30/2012	12/21/2012

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

Los Angeles, Seattle, Portland, San Francisco

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For the quickest response and support, email help@trgarts.com.

Step #1 - Take Inventory of your Lists / Segments

Consider the past several seasons or membership cycles and where the data is housed (ticketing system, donor or fundraising system, education lists, staff or artist lists, volunteer lists, etc.).

Any data you provide can be hidden within eMerge so only your organization has access.

How much of my data should I submit to the community database?

We recommend that you treat the community database as your own online marketing tool and send *ALL* the data you have available on all patrons and their transactions from the last five years. The more data you put into the community database, the more control, marketing intelligence, and savings you will get out of it. Only with complete data *IN* the community database can you expect maximum benefits *OUT* of it.

Step #2 – Plan Your Segmentation Scheme

What is segmentation?

Segmentation organizes the composite of your data into segments (or lists). TRG uses three fields to determine segmentation: Buyer Type, Year, and Description. *Records that do not have segmentation will not be accepted.*

Buyer Type

Buyer Type defines the transaction or interaction a group of patrons had with your organization.

Year

Year defines the year or season in which an event took place. An event that takes place during the 11-12 Season should be marked as 2012.

Description

Description defines the event or transaction that took place.

Why do I need to segment my data?

Segmentation determines how your data appears eMerge, and provides context for the records that are within any particular list. It is important for your staff and trading partners to understand the specific interaction those patrons had with your organization. For example, you can quickly identify that the patrons within the ‘10-11 STB: Magic Flute’ segment purchased a single ticket for “The Magic Flute” in the 2010-2011 season.

Segmentation Style Guide
TRG has created a set of segmentation standards to ensure consistency and ease-of-use. It is strongly suggested that you follow this standard when naming your lists.

- Single Ticket Events (whether paid or free events)
  - Event Year (split or full), buyer type, colon, show/event/etc.
    - Example: 10-11 STB: Nutcracker
- Subscriptions should be segmented by package type
  - Full, 6-Pack, Flex, CYO (Choose Your Own)
    - Example: 10-11 SUB: Full Dance, 2011 SUB: Flex
- Donors will predominately be used by the organization supplying the information and not shared within the community; however, there are a few segmentation standards to consider
  - By giving level – 2010 DON: $250-$1000
    - This is the preferred recommendation as it allows organizations the most visibility and use in the system.
  - By year – 2010 Donor
  - By campaign – 2010 DON: Annual Fund

<u>Other Buyer Types :</u>

Buyer Type	Definition	Event Description Example
DNC	Do Not Call - available for you when creating a phone list	Do Not Call
DNE	Do Not Email - removed from email lists created	Do Not Email
DNM	Do Not Mail - removed from trades, mailing list created	Do Not Mail
DNT	Do Not Trade - removed from trades	Do Not Trade – 2011 Board Members
SUP	Suppression - removed from all trades, orders; MOST COMPREHENSIVE	2011 VIPs 2011 Staff 2011 Major Donor Fundraising Dinner
ALL	All House	2011 ALL: Magic Flute Preview
CMP	Complementary	2011 CMP: La Traviata
EDU	Education	2011 EDU: Family Improv Workshop
EMA	Email List	2011 EMA: Free Dinner & Tickets Contest – Nutcracker 2011 EMA: Newsletter
GEN	General	2011 GEN: General Mailing List
GRP	Group	2011 GRP: La Boheme
PRO	Prospect	2011 PRO: Prospective Annual Fund Donors
REN	Venue Rental – list obtained through renting your venue to another organization	2011 REN: Other Theatre Company - Comedy
SUR	Survey	2011 SUR: Fall Subscriber Survey
TRA	Trade	2011 TRA: City Opera – General List
VOL	Volunteer	2011 Volunteers
CLA	Class	

Step #3 – Pull your data

Once you have a sense of the data available to you, pull and compile it. A template and sample submission has been provided for your reference. Valid records are those that have at least ONE of these fields populated: Last Name, Full Name, Company, or Email. Records without one of these will not go into eMerge.

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.

Why is it important that I send my suppression (Do Not Mail, etc) segments?
Suppression lists allow you to control who you are mailing, but more importantly who you are not mailing. Any record included in a suppression list will be automatically removed from any other house or trade list in which they appear.

Should I include Patron ID numbers in my data submission?
Organizations that rely on patron ID numbers within their own ticketing or patron tracking system often include them in their submissions. Patron IDs are not required for submission.

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. Each record (row in Excel) represents an individual transaction. Should a patron purchase more than once, simply include a record for each transaction. For example, if Jane Smith purchased a single ticket to Nutcracker and a single ticket to Giselle, she would have two separate records.

BUYER TYPE	YEAR	DESCRIPTION	FIRST	LAST	FULL NAME	COMPANY	EMAIL	ADDRESS 1	CITY	STATE	ZIP
STB	2011	10-11 STB: Nutracker	Jane	Smith	Ms. Jane Smith			123 Main St.	New York	NY	10019
STB	2012	11-12 STB: Giselle	Jane	Smith	Ms. Jane Smith			123 Main St.	New York	NY	10019

eMerge de-duplicates records at the order level (mailing list, email list, etc). Do not de-duplicate your data prior to sending to TRG.

*Quick Tip: Including first, last **and** full name ensures that records are properly de-duplicated and appended with demographic data. The combination of last name and street address is used for both processes. The full name field will never be altered in any way. The system generates first and last names from the full name field when left blank. Think of the full name field as the salutation field, Mr. and Mrs. Robert Jones, Jane Graham and Michael Smith. If you do not designate a primary first and last name, you will have Jane Smith rather than Jane Graham.*

Step #4: What File Format to use

TRG can accept most electronic file formats including:

- Microsoft Excel 97-2003 (.xls)
- Microsoft Access (.mdb)
- Text Format or Comma Delimited (.txt or .csv)

Step #5: Submit your data to TRG

1. **Name the file you are submitting with your organization name**
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: Westcoops**

   b. **Password: addin1**

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
   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
   h. Record Count: Record quantity of uploaded file
   i. Confirmation E-mail: You can add additional e-mail addresses to receive a confirmation message
   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.*