

Instructions for Sending Transactional Data to Target Analytics

Target Analytics requires one data file from your organization to create the donorCentrics reports. The data file required is a download of your entire history of transactions for all your donors, with one record per each gift transaction.

Please send a layout description for the data files. If your file includes field labels that are non-descriptive (e.g. "attribute1"), provide definitions for the field names.

If you have any questions, contact data support at ftpsupport@blackbaud.com. If you are unsure about whether Target Analytics will need a particular data element in the download file, please include it.

File Format

- Send a flat ASCII file either fixed-length or comma-separated (.txt or .csv files, not Unicode).
- Use a 4-digit year format for all dates (e.g., DD-MM-YYYY, YYYY/MM/DD, etc.).
- Be sure that all records end with a carriage return and a linefeed.

Required Data

It is very important for the integrity of the reporting that we receive all records on your database dating as far back as possible. We do not require donor names and addresses.

IMPORTANT: Select ALL records on the database through the close of your fiscal or calendar year; transaction download should contain one record per individual gift. The columns listed in bold are required.

<u>Gift Transaction Data</u>	<u>Description</u>
Account	ID The code that identifies the donor who gave the gift. E.g. 0013947
Payment Date	Date the gift was made. Include 4 digits for the year, exclude timestamps. E.g. 10-JAN- 2011.
Payment Amount	Please format without currency symbol or thousands separator. E.g. 1500.00
Source Code	Complete source code or appeal code that identifies the appeal or gift channel. E.g. WI1039.
Source Type	If available, a category of source channel. E.g. Mail, Telemarketing, Events, Web.

Gift Type	Indicate whether recurring (regular) gift, one-time single gift.
Frequency	If available, indicate whether recurring (regular) gift is given on a monthly, quarterly, bi- annual, annual basis.
Payment Method	E.g. cash, check, credit card, direct debit, bank transfer, etc.
Transaction Type	Identify pledges, matching gifts, and soft credits.
Gift ID	Include the unique identifier of the gift transaction.

Please include any other data elements that would help us understand and interpret your giving history or donor file data. If you are uncertain about the usefulness of any field, please include it anyway.

File Delivery Instructions

Please go to [here](#) for instructions on how to transfer your files to us via secure FTP. These instructions explain how to set up a connection to the Target Analytics FTP site.

Instructions for Completing donorCentrics Surveys

For security purposes, a user name and password are required to access the surveys. You should have received those credentials from your Blackbaud Project Manager.

Upon receipt of user name and password, go [here](#) and scroll down to click on *E-participation Site for Regional, National and International Organizations*.

1. Login and complete the Fundraising Practices Survey – This survey will provide Target Analytics with information about your fundraising practices. This information complements the revenue, donor, and gift metrics that we calculate from your transactional data download.
2. If your organization meets the requirements listed below, login and complete the Data Specification and Coding Survey – This survey will provide Target Analytics with information needed to interpret the data and codes in your data files.
 - a. A completed data survey is **required** for us to process your data if you are the following
 - i. a new client
 - ii. have undergone a database conversion in the last year