Guide to Sending Data for Public Broadcasting Organizations

Blackbaud Target Analytics requires two files from your organization to produce the standard line of our products. Each of these files is described in detail within this guide but the requirements can be summarized as follows:

1. Account-Related – a file with name, address, phone, and email information for all donors of all type…………….Page 2
2. Transaction-Related – a file with the transaction/giving history for all donors………………………………………………Page 3,4

Please note:

- Please send data for all donors and all gifts in your database, with no date restrictions. This will enable us to accurately identify first gifts and model the behavior of recurring donors.
- An account ID should be included with each record in both files. This is the mechanism for linking the information.
- The transaction file should contain one record per individual gift transaction—gift data should not be aggregated, summarized, or "rolled up".

Formatting:

- Send a flat ASCII file that is either pipe-delimited ("|"), comma-separated (.txt or .csv files), or fixed-width. A layout document is required for all fixed-width files. Tab-delimited formatting should be avoided when possible.
- Use a 4-digit year format for all data fields (e.g., DD-MM-YYYY, YYYY/MM/DD, etc.).
- Be sure that all records end with a carriage return and a linefeed.

Additional Documentation:

- Please send layouts for both your account-related and transaction-related 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).
- All files should be named in a manner that includes the station call letters and data purpose, e.g. "WXYZ – Donor Information.txt". We handle large volumes of data on a daily basis so it is important we are able to quickly determine the provenance and purpose of each file submitted in order to avoid unnecessary confusion and processing delays.

We may have made arrangements with you in the past for particular custom processing steps. If you have been sending us transaction data with no issues up to now, you should continue sending your data in the prior format and layout. If you are unsure as to whether Target Analytics 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 a field containing 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 Delivery Instructions

Please visit http://www.blackbaud.com/tasupport and click on 'step-by-step instructions for sending data' to transfer your files to us via secure FTP. These instructions explain how to set up a connection to the Target Analytics FTP site.

File 1: Account-Related Data

The account-related file should contain ALL donors on your system. You may also choose to include prospects and other non-donor populations. Transfer all account-related information in ONE file, with as many of the following fields for which you have data. You do not need to follow these fields exactly, but we do ask that you include all the following information if your station captures it (fields marked with "●" are required).

	Field Type	Field Description
●	Account ID	Unique identifier used to link your files.
	Address Type	
●	City	
●	Deceased Flag	
	Donor Status	
	Donor Title	
●	Email address	
●	First Name	
●	Full Name	e.g., Tim Barton, or, if applicable, Mr.Tim Barton & Mrs. Susan Barton
●	Last Name	
	Middle Name	We can also accept a middle initial.
●	Phone number	
●	State	
●	Street Address	e.g., 50 Washington Avenue N. Apt. 3. Provide PRIMARY address.
	Suffix	
●	Suppression Flag	e.g., No Mail, No Phone, No Exchange, No Solicit
●	Zip plus 4	

File 2: Transaction-Related Data

Transfer all historical payment transactions in one file. Select all records on the database as of today's date. Include all fields below that your organization tracks (fields marked with "●" are required). **Important:** your transaction history download should contain one record per individual gift transaction.

	Field Type	Field Description
●	Account ID	Unique identifier used to link your files.
	Activity	Activity, i.e., Membership, Planned Giving, Capital campaign, etc.
	Activity Type	
●	Affiliation Code or Station Support	Used for Joint Membership and Joint License stations. This is how we identify television and radio gifts in your files.
	Campaign	e.g., On-air pledge, Renewal mail, Lapsed telemarketing,
	Effort	Effort of solicitation – e.g., 1st mailing, 2nd mailing, etc.
●	Expiration Date	Used to identify when a donor has lapsed (If this field is not available, we can calculate your expiration date by adding a year to the gift date)
	Fiscal Month	
	Fiscal Year	
●	Fund Type	The designated use for the money; e.g., Restricted, Unrestricted Designation Code, Capital Campaign, PAC gift.
●	Gift ID	Unique identifier for each gift
●	Gift Kind	Indicating whether gift is either Recurring (regular) or Single (one-time). Recurring gifts are donations that are set up to occur automatically without a need for any additional solicitation of the donor.
●	Gift Received Date	Date payment received. Date field with MM/DD/YYYY format. Exclude timestamps.
●	Gift Type	Used to identify a gift as either New, Renewal, Additional, Lapsed, etc.
●	Initiative	Initiative of gift, e.g., Sept. 02 campaign, etc.
●	Installment Amount	Format 9999999.99. Exclude currency signs or commas.
	List	

	Package	
●	Paid to Date	Format 9999999.99. Exclude currency signs or commas.
●	Payment Amount	Format 9999999.99. Exclude currency signs or commas.
●	Payment Frequency	e.g., Monthly, Annually
●	Payment Method	e.g., Cash, Check, Credit Card, EFT, Payroll, Deduction.
●	Pledge ID/Installment ID	ID field linking pledge payments made on a particular pledge or installment series. On some systems the gift ID field may be used to tie together pledge payments or installment payments.
●	Pledge Amount	Records containing the promised amount; not representative of the actual revenue received.
	Program	
●	Source Category	A category of source. e.g. Mail, Telemarketing, Events, Web. You may also refer to this field as Technique, Appeal Category, or Outbound Channel.
●	Source Code	Complete appeal code identifying the specific solicitation that motivated the gift. Include additional fields if necessary to distinguish response to a mailed appeal from response to telemarketing, etc.
●	Source Description	Text description of the affiliated source code.
	Technique	Value used to identify the general method/technique used to solicit a gift, i.e., Mail, Phone, Web, On-air
●	Transaction Type	May include codes that distinguish transactions as pledges, pledge payments, matching gifts, bequeaths, or other special transaction types.

Contact your Project Manager with any questions about your project.

If you are unsure who to contact, please email TAGAnalyticServices@blackbaud.com.