



New Member Submission Guide

Welcome to Data Center! This guide describes the New Member Add-in process and answers key questions to help you start off right. This guide is for new members who are submitting data to the TRG Data Center for the first time. If you're already a member, ask for details on refreshing your data.

Inside this Guide

- Timeline for Joining
- Submission Process Overview
- Step 1 - Complete the New Member Survey
- Step 2 - Prepare Your Data for Upload
- Step 3 - Submit Your Data
- Step 4 - Check Your Data for Errors
- Step 5 - Complete TRG Data Center Training
- Step 6 – Attend Quick Wins Training

Who do I talk to with questions?

For questions regarding any step of the Data Submission Process or Data Center functionality, please view the online trainings in Data Center, accessed from the question mark icon on the top right of the platform.

If you still have questions after viewing training materials, contact the TRG Help Desk at help@trgarts.com.

For questions regarding your Community Network membership, please contact TRG. For a list of TRG Community Networks and partner organizations, go to:

<http://www.trgarts.com/Whatwedo/CommunityNetworks/FindaNetworknearMe.aspx>.

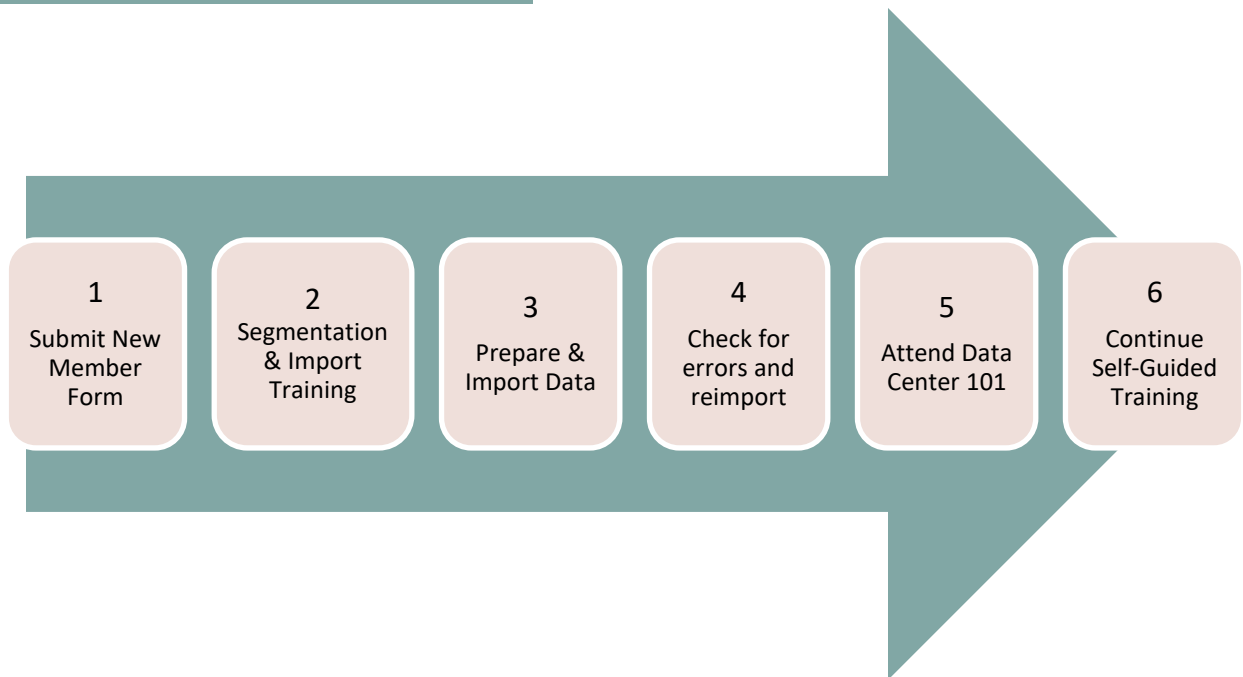
Timeline: When Can I Join?

New members can join on a monthly basis using the basic timeline below.

New Member Timeline to Join

Action	Monthly Deadlines
Data Center New Member Form submitted	Complete by the 1st business day of each month. Submit here.
Segmentation Strategy & Import Training	Week 1 Live training session covering the foundations of preparing your data and importing it into Data Center. This one-hour session is held on the first Thursday of each month. RSVP here.
Import your data into Data Center	Week 2-3 Begin importing your data after attending the Segmentation & Import training. Review Basic File Preparation & Basic File Import materials for support.
NCOA Processing	Week 4 Initial NCOA processes on the last Thursday of the month. Regularly, quarterly NCOA continues after the initial processing.
Accounts are live!	Week 4 The following Monday after NCOA processes accounts are fully live with all functionality active, including Trading, List Building, and Reports. You will receive notification of this.
Data Center 101 Training	Week 5 Live training session covering the functionality of Data Center, including how to build campaigns, request trade lists, run reports, and more! This one-hour session occurs the first Wednesday of each month. RSVP Here.
Data Center Quick Wins Training	Quarterly trainings. These training dive deeper into one topic and you will receive a separate email invite after you are live in Data Center.
Data Center Help Page	Self-guided as needed. The Data Center Help & Training page is a comprehensive knowledgebase to help you become a Data Center power user! Materials include video tutorials, on-page support, and more. Access these materials via the question mark icon when logged into your Data Center account.

Submission Process Overview



Step 1 – Complete the Data Center New Member Form – This form lets TRG know your basic organization details and the contact information of your staff who will need login credentials. You can have unlimited users and [Manage Users](#) inside your account.

Step 2 – Attend Segmentation & Import Training – Attend [Segmentation Strategy & Import Training](#) to understand how to setup your account. Take inventory of your data against the required fields for participation and design your segmentation strategy for the data load.

Step 3 – Prepare & Import Your Data and Submit Your PAF – Import your data into TRG Data Center using the Imports module. Review the [Basic File Preparation](#) and [Basic File Import](#) trainings for support.

Upon your first time login, you'll be prompted to complete your [Processing Acknowledgement Form](#) (PAF), required by the USPS. The PAF gives us permission to run your data through NCOA hygiene.

Step 4 – Check Your Data for Errors – Run the data quality reports in the Data Center to find and fix any errors in your data import. Ensure all data has completed importing by the last Thursday of the month to be included in the monthly new member NCOA. Please allow 1-5 days for your data to complete importing (NOTE: we cannot guarantee overnight importing so plan accordingly). Once your initial data completes NCOA processing, you will be able to load new data any time and your data will be run through NCOA quarterly thereafter.

Step 5 – Attend Data Center 101 & Quick Wins Trainings – Attend these live, interactive training sessions to help you get started on building lists and conducting patron research.

Step 6 – Continue TRG Data Center Self-Guided Training – Login to view the full suite of training courses, including how to build lists, run reports, and more! These trainings are available anytime and are a resource to help you learn the tool.

Data Requirements

Can the TRG Data Center replace my database or CRM?

The TRG Data Center is a tool to research patrons and build lists for your campaigns. It is not a tool to manage your daily relationships or transactions with customers. You'll still need your CRM for selling tickets and managing daily transactions. The process of submitting data is like "copying and pasting" from your current database, into an environment where you can build and trade lists for campaigns and marketing analysis.

What data am I required to submit?

TRG Data Center allows you to submit biographical patron data that includes single ticket buyers, members, subscribers, donors, and others. It is best practice to include at least 3 years' historical patron data, but you can import more than 3 years if preferred. You have unlimited imports, and TRG's best practice is to import your data on a monthly basis if your capacity allows. If you do not have the resources to perform monthly imports, then plan to import your data at the end of each event to ensure the most recent data is available for use. The more data you import, the greater your capacity to use the system to its full advantage.

Biographical Data

These fields include standard contact info, such as patron name, address and email, as well as the ability to load unique IDs from your database or CRM. All records must contain a patron name and mailing address, to assist with the de-duplication and demographic append processes that will happen later in the TRG Data Center. You will not de-duplicate your lists at the time of upload; a patron will appear multiple times if they had multiple interactions with you.

Can I also submit my suppression lists?

Yes. As part of your initial load, you may submit suppression files in the following categories:

- **Do Not Mail** – patrons who will be removed from your own mailings, as well as approved trades
- **Do Not Trade** – patrons who will be removed from approved trades, but will remain in your own mailings
- **Do Not Call** – patrons who will be removed from phone or telemarketing lists
- **Do Not Email** – patrons who will be removed from email lists
- **Suppression** – patrons who will be removed from **all** lists and trades ("blanket" suppression)

How much data should I submit?

We recommend that you treat the TRG Data Center as your own online communications tool (not just a trading mechanism) and import *ALL* the data you have available on all patrons and their transactions from the last three to five years. With complete data, you'll get a holistic view of each patron's total interactions with you—helping you better qualify prospects for your own campaigns. Plus, with all of your data in the system, you can create trade lists that do not need to be merged with external data from your database(s), saving you money at the mail house.

What if I don't want other organizations to see some of my data?

Any patron segments you upload can be hidden from trading partners, so that only your

organization can use them. You can [Manage your Segments](#), and no one can see your lists without your permission. Strict security measures ensure that your data remains in your control. As an additional safeguard, you can upload valuable patrons as a Do Not Trade segment, ensuring that their names will never be traded, regardless whether they also appear in other segments.

How do I prepare my data?

Think about the various types of patron lists (aka segments) you have within your organization, considering the past several seasons or memberships cycles. Consider where those segments are housed: in your database, CRM, ticketing system, donor or fundraising system, education lists, staff or artist lists, volunteer lists, etc. The more segments you upload, the greater your capacity will be to use the system to its full advantage. Below are resources to help you plan your segmentation, and it is highly recommended to attend a Segmentation Strategy & Import training.

- [TRG Segmentation Workbook](#)
- [TRG Segmentation Core Concepts Part I](#)
- [TRG Segmentation Core Concepts Part II](#)

Do I need to format my files in a certain way?

Files in the following formats are accepted: .txt, .csv, .xls or .xlsx. You do not need to rename your fields or follow any specific file layout; instead, Data Center will ask you to map your fields to TRG standard attributes during the import process. You must adhere to basic data management practices; review the [Basic File Preparation](#) materials on the training page.

How do I get my data into the TRG Data Center?

You upload your data in the Imports module in Data Center where you will answer a few basic file questions and then map your file fields to the preferred TRG Data Center fields. Follow the [Basic File Import](#) training video for step-by-step instruction.

Will TRG notify me of problems with my data import?

Yes. The user who imports the file will receive an email confirmation when the file import is complete and also shows any validation, parse, or load errors. Organizations are expected to view the Import Details Report in File Manager and correct errors accordingly. If you have questions about your reports, feel free to email them to help@trgarts.com.

What types of errors might occur, and how do I fix them?

Once a file has been imported, you can view the report in the Imports module by selecting the 3-dot icon to the right of the needed file. on the link to see the results of the latest import for that file. See the [Validation Error Import](#) training materials in the Help menu for specific instructions.

How long will it take for my data to be ready for use after I import a file?

To keep the TRG Data Center running smoothly during normal business hours, files are queued for import overnight when fewer users are working in the system. TRG Arts guarantees that the

data will be available for use within five business days, though data is often available the next business day. After you import your file, you can monitor the status in the Imports module. You can also review any data validation errors here by selecting the 3-dot icon to the right of the file. Help Desk will be in touch with you if your file mapping is denied and will explain the error and how to correct it. *Note that your data will not be run through NCOA hygiene until the day specified on page two. Any lists built before that time MUST be hygiened by your mail house.*

NCOA PAF

The National Change of Address Processing Acknowledgement Form (PAF) gives us permission to run your data through NCOA hygiene, and is required by the USPS. The submission of your PAF is automated within Data Center, so when you log in the first time, you'll be prompted to complete the form. Review the [PAF requirements](#) on the training page.

What happens if I miss the NCOA deadline?

If you have imported data after NCOA is run, then you must either wait until the next monthly New Member scheduled NCOA or regularly scheduled quarterly NCOA. If you must use your data before those dates, then you can expedite this by purchasing an Out of Cycle NCOA which is a minimum charge of \$150. Contact Help@trgarts.com to make that request.