
TrueAppend's Input Guide

Contents

Quick Overview	1
Field Requirements	2
Input ID.....	2
First Name and Last Name (or Full Name)	2
Address 1.....	2
City and State, or Postal Code.....	2
Postal Codes Starting with Zero	3
Pass-Through Fields	3
TrueAppend's Recommended Mapped Fields.....	3
File Type Requirements	3
Processing Your File	4
Upload.....	4
Mapping Fields.....	4
Process Your File	5
Completed File	6
Errors.....	6

Quick Overview

- File must be a .csv, .txt, .xls, or .xlsx.
- File must contain: Input ID, First Name, Last Name, Address 1, City and State (or Zip Code).
- File must have Input ID – this aids in matching your output file back to your database.
- Company Name should be listed in the Last Name Field.
 - This will return more accurate data for each company.
 - You can map it to Full Name but risk the Company name being parsed incorrectly.
- Double check your mapping.
 - Note: If the app finds an issue with your mapping, an error will return on the top of the page!
- The TrueAppend Report is complimentary and returns summary information about your processed file.

Continue reading to learn even more about input file guidelines.

Field Requirements

Users must include certain fields to run a file with TrueAppend. These fields are required to best match your records to the database(s). To upload a file, TrueAppend requires the following fields:

- Input ID
- First Name and Last Name **or Full Name**
- Address 1
- City and State **or Postal Code**

Each of the above fields should be in their own column. See [TrueAppend's Recommended Mapped Fields](#).

If you have an ID that you use within your organization, you should include that column on upload and map it to our Individual ID field. We also encourage users to include as much address related information on their upload file as possible, including: Address ID, Address 2, and Postal Code. These fields should be populated and have the appropriate headers.

Input ID

Input ID is a unique identifier given to each record. Usually a set of numbers, the Input ID aids users in matching our output to their database. Because our system is looking for numbers, *the input ID should not be mapped to any other fields*. If you don't have an ID for your constituents, we recommend just adding a new column in your file named Input_ID and numbering your records starting with 1.

First Name and Last Name (or Full Name)

Constituent names should be separated into First Name and Last Name. We also accept Full Name. First and Last name is highly recommended by TrueAppend as it allows the app to read the name most clearly. Full Name is automatically parsed or separated into First Name and Last Name.

If your file contains Company Name, you should follow these steps to make sure those records are processed correctly:

1. If your file contains ONLY company names and company addresses, please make sure that company name is located in the Last Name Field. You should create a first and last name field in your file. Leave the First Name field blank and place all company names in the last name field. Then, upload your file to our app, and map your First and Last Name fields to the system's First Name and Last Name fields.
2. If your file contains BOTH individual and company names and addresses, please make sure that company name is located in the Last Name Field. You should create a first and last name field in your file. Leave the First Name field blank and place all company names in the last name field. Then, upload your file to our app, and map your First and Last Name fields to the system's First Name and Last Name fields.

Address 1

TrueAppend requires Address 1 to be included in the input file. Without this field, your file will not run. Address 1 should contain the main address information on a constituent; this includes house number and street name. Apartment or Unit numbers can also be included, but we recommend adding those to an Address 2 field.

Please Note: If you have Care of (c/o) fields or company names located in the Address 1 field, we encourage you to move these to a separate field. Sometimes these extra address details shift the actual address to Address 2, therefore causing the system to read it incorrectly. If you have company name, read the [First Name and Last Name \(or Full Name\)](#) section above.

City and State, or Postal Code

City, State, and Postal Code should each have their own field. TrueAppend requires city level location to be included in the input file. This city level location can be given by either supplying City and State (2 fields), Postal Code (1 field), or City and State and Postal Code (3 fields).

We recommend giving all three city level location fields to help find the correct address, but remember, some errors could still occur. If you decide to map all three fields, each record should have City, State, and Postal Code data included. Meaning every field Have an issue? Please contact support@trueappend.com for help.

has data in it. Some users may benefit from only mapping City, State. Whereas others may benefit more from only mapping Postal Code. Users may run their file several times (for FREE) and can review the TrueAppend Report for Free!

We always encourage users to review their file for errors or incorrect data before uploading and processing.

Postal Codes Starting with Zero

Sometimes when Postal Codes start with zeros, Excel drops the zeros even when formatted correctly. To resolve this issue, update your records with Postal Codes starting with zero to have a single quote. (Example: '00123). If you have City and State listed on your file, feel free to map City and State instead of Postal Code. City and State are acceptable locations.

Pass-Through Fields

If your file contains data fields that aren't required for mapping, that's ok. You can skip that field during mapping by leaving the dropdown blank.

However, **if you need that data returned on the export**, you can use the Pass-Through field mapping option to retain those fields through the process. If you don't see the Pass-Through option, just click the toggle fields button to change your view.

As an example, if it's important for you to have a constituent's phone number on your export, you could map phone number to Pass-Through, and the phone number you provided will be on your records in the export file.

TrueAppend's Recommended Mapped Fields

TrueAppend has found the best results when the following fields are mapped:

✔	✔
Input ID	Input ID
First Name	Full Name
Last Name	Address Line 1
Address Line 1	Address Line 2
Address Line 2	City
City	State Code
State Code	Postal Code
Postal Code	

Don't forget to add Input ID!

File Type Requirements

Files processed through TrueAppend must be one of the following file types:

- Comma-Separated Value files (.csv)
- Tab Delimited files (.txt)
- Excel files (.xls)

A Comma-Separated Value (CSV) File is a simple file format used to store tabular data, such as a spreadsheet or database, created by adding commas to separate the data. [View a CSV file](#). CSV files can be created in Excel by saving the table and changing the 'Save as Type' to CSV (*Comma Delimited*).

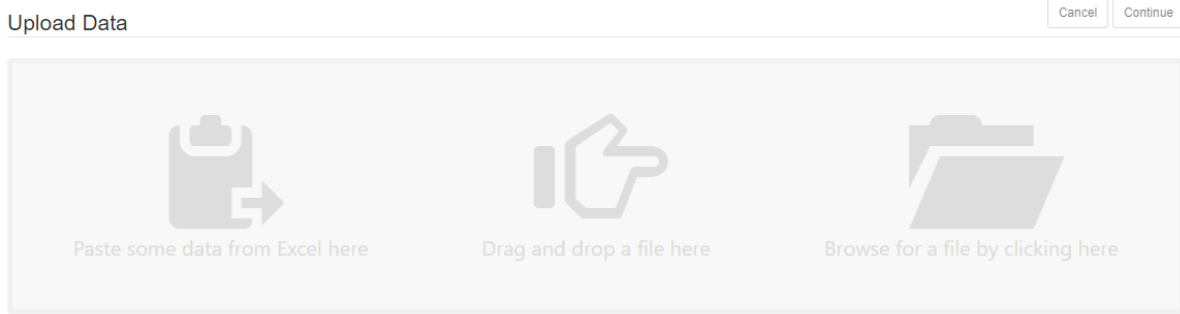
A Tab Delimited File is a simple text format for storing data in a tabular structure, such as a spreadsheet or database, created by adding tabs between data fields. [View a Tab Delimited file](#). Tab Delimited files can be created in Excel by saving the table and changing the 'Save as Type' to *Text (tab delimited)*.

An Excel File is known as the Binary Interchange File Format (BIFF). Data inside all Office Document files are stored in series of fixed-size streams. All the data is contained in records that have headers, which give the record type and length. [View a XLS File.](#)

Processing Your File

Upload

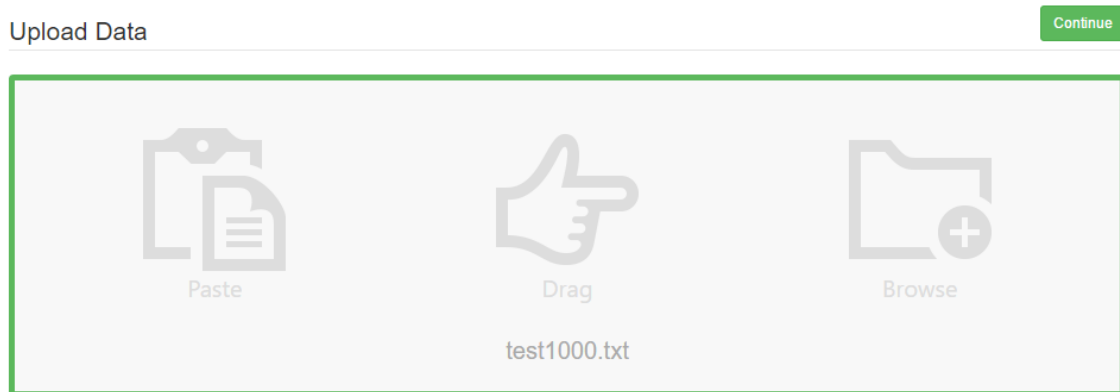
Users can upload a file right from our homepage. Upload your file one of three ways: Paste, Drag/Drop, and Browse.



1. **To Paste:** User should 1) open their file; 2) copy all rows including the header; 3) and paste into the Upload Box. User should paste near the Copy/Paste icon.
2. **Drag/Drop:** User should 1) access their file and drag into the Upload Box. User should drag the file to the Drag Icon in the Upload box to have a successful file upload.
3. **Browse Files:** User should click the Browse Icon. Their File Explorer should open and allow the user to select the file they want to upload.

Please note: A files should be selected from its original file source. Using a file from your recent files or frequent folders will not upload properly.

When a file has uploaded successfully, the Upload Box will have a green border and the Continue Button will turn green. To continue processing your successfully uploaded file, click the green Continue Button.



Mapping Fields

After clicking Continue, you'll have to map your fields to our system fields. The app will try to automatically map your fields, but you should make sure to review them for duplicate mappings or missing fields.

Save Field Mapping

Details

Id 57

Status Created

Name TrueAppend.csv

Records 1,008

Create Date 1/26/2018 10:28:21 AM

Toggle Fields

Fields

Map each input field to a system field. When you are ready, click "Save Field Mapping" above to continue ...

Input Field Name	<input type="button" value="←"/> Sample <input type="button" value="→"/>	Maps To
id	2	Id
full name	John Doe	Full Name
address1	123 Main St	Line 1
address2		Line 2
city	Canfield	City Name
state	OH	State Code
zip	44406	Postal Code

To add Pass-Through fields during mapping, just map the field you want to retain to our Pass-Through field. If you don't see it as an option, just click the toggle fields button to change your view.

If you receive an error, make sure you read the error and update your mapping to avoid the error again. To read about the errors you may encounter, check out our [Errors](#) section.

When you are done mapping, click the Save Field Mapping button located at the top left of the page.

Process Your File

Once you have uploaded and mapped your fields to our system fields, you are ready to process your file! To start processing, simply click the Process File button at the top of the page.

[Edit](#)
[Map Fields](#)
[Process File](#)
[Delete](#)

When your file is done processing, you will receive a notification at the top of the File Display page. You will also receive an email notifying you that your file processing is complete, so there is no need to stay on the page during processing.

Completed File

When your file is complete, make sure you check out your [TrueAppend Report](#). This will give you details as to what changes were made during processing, and it will also give you details about the data appended to your file. If you decide you would like to purchase, buy some credits and then export and download your file.

Errors

You could be getting an error for a number of reasons. Remember TrueAppend only supports csv, txt, and xls or xlsx files!

Check the table below to find your error. If you received an error that is not in this table, please contact support@trueappend.com.

Error	Reason for Error	Solution
File creation failed	Your file has no records.	Review your file and make sure it is following the TrueAppend input guidelines.
The key has already been activated, please reset your password again.	Your Activation link has already been used or already expired.	Reset your password.
Map first name and last name, or map full name to continue - you cannot map first name and last name AND full name at the same time	Mapping first name and last name at the same time as full name	Make sure you are only mapping First Name and Last Name or only mapping Full Name. Using all three fields will cause an error.
First Name and Last Name OR Full Name must be mapped.	Not mapping any name fields.	Make sure you are mapping an individual name by mapping either both First Name and Last Name or by mapping just Full Name. Each record should have a constituent's name listed.
Address city and state code, or postal code must be mapped.	Not mapping any location fields.	Make sure you are mapping location information. You must map location 1 of 3 ways: 1. Address City and State Code 2. Postal Code 3. Address City, State Code, and Postal Code
Individual ID must be mapped.	Not mapping Individual ID field.	Because updated addresses are returned as a new record, users must map Individual ID to correctly identify and match the original records to the updated records in the export.
Duplicate fields have been mapped; only map fields once.	Mapping duplicate fields.	Check your mappings to make sure that there are no fields that are mapped more than once. The only exception for duplicate fields is the Pass-Through field accessible through the Toggle Fields view.
Individual first name and last name, or full name must be mapped.	First name and Last name are not mapped (Ex: Last Name and Full Name are mapped)	Make sure you are mapping an individual name either by mapping both First Name and Last Name or by mapping just Full Name. You cannot map First Name and Full Name or Last Name and Full Name together.

<p>Invalid file or data.</p>	<p>Upload error: Wrong file extension.</p>	<p>Some initial requirements include:</p> <ol style="list-style-type: none"> 1. File must be a .csv, .txt, .xls, or .xlsx. 2. File must contain: First Name, Last Name, Address 1, City, State (or Postal Code), and Input ID.
<p>The same input field has been mapped more than once; please check your field mappings</p>	<p>Duplicate input fields have been mapped to separate system fields.</p>	<p>Check your mappings to make sure that there are no fields that are mapped more than once. The only exception for duplicate fields is the Pass-Through field accessible through the Toggle Fields page.</p>
<p>Your file had a problem while processing, but don't worry, we are already investigating the problem :)</p>	<p>The file may have failed during processing.</p>	<p>Check your file for issues. These issues are usually caused by carriage returns or extra commas included in the file. After the file is updated, rerun a new updated file. If the issue persists, contact support@trueappend.com for help.</p>