TrueDeceased's Input Guide

Contents

Quick Overview

- File must be a .csv, .txt, .xls, or .xlsx.
- File must contain: First Name, Last Name, and Address Data
- We recommend adding Phone Data and/or Email Data to improve match rates
- 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 TrueDeceased Report is complimentary and returns summary information about your processed file.

Continue reading to learn even more about our input file guidelines.

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Field Requirements

Users must include certain fields to run a file with TrueDeceased. These fields are required to best match your records to the database(s). To upload a file, TrueDeceased allows several combinations of data to match to the database. This data includes Name, Address, Phone, and Email.

Users should always map to the First Name and Last Name field (or Full Name field). You must always have a combination Name information and either Address, Phone, or Email information.

Name + Address + Phone + Email	Name + Address
✅	✅
First Name Last Name Address 1 City State Code Postal Code Phone Email	First Name Last Name Address 1 City State Code Postal Code

NOTE: First Name and Last Name may be replaced with Full Name.

The recommended fields above are **not the only** combination of fields you can use; you can use any combination of Name + Address +(Phone and/or Email). Currently, you must include address data to successfully map your records.

We encourage users to include Input ID. The use of Input ID aids in matching your output file back to your database. If you have an ID that you use within your organization, you should include that column on upload, and map it to our Input ID field or pass-through field.

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 a unique ID, *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. Please Note, Input ID is not a required field, but TrueDeceased highly encourages you, the user, to use an ID field when uploading your file.

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 TrueDeceased as it allows the app to read the name most clearly. Full Name is automatically parsed or separated into First Name and Last Name.

Additional Name Data

TrueDeceased also allows you to map additional name parts to assist with matching. You can also map to Prefix, Middle Name, and Suffix.

Address Data

TrueDeceased recommends using address data when processing your file. This will return more matches than simply using phone or email. When mapping address data, you must use Address 1, City, State, and/or Postal Code.

Address 1

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.

City and State, or Postal Code

City, State, and Postal Code should each have their own field. TrueDeceased requires city level location to be included in the input file for address data. 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).

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. Additionally, using a CSV or TXT file will help you to avoid this issue all-together.

Remember, Address data must always have Name (First Name and Last Name OR Full Name) information associated with it.

Phone Data

TrueDeceased recommends using phone data when processing your file. This will return additional matches that may not match to address or email. When mapping phone data, you should use one field with a header referencing the phone number.

Phone number does not have to be formatted in any specific way. Please make sure that it is not being recorded in scientific number format.

Remember, Phone data must always have Name (First Name and Last Name OR Full Name) + Address information associated with it.

Email Data

TrueDeceased recommends using email data when processing your file. This will return additional matches that may not match to address or phone. When mapping email data, you should use one field with a header referencing the email address.

Remember, Email data must always have Name (First Name and Last Name OR Full Name) + Address information associated with it.

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 age on your export, you could map age to Pass-Through, and the age you provided will be on your records in the export file.

File Type Requirements

Files processed through TrueDeceased 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.

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.
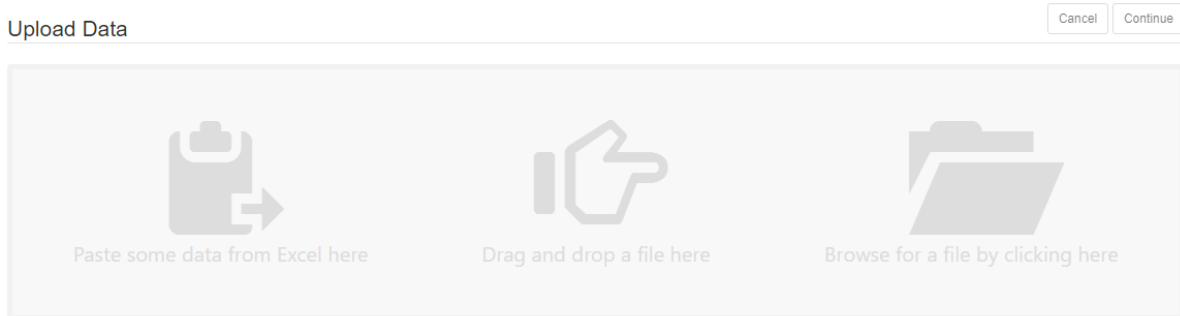
1. **To Paste:** User should 1) open their file; 2) copy all rows including the header; 3) and paste into the Upload Box. User should paste near the Copy/Paste icon.

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.
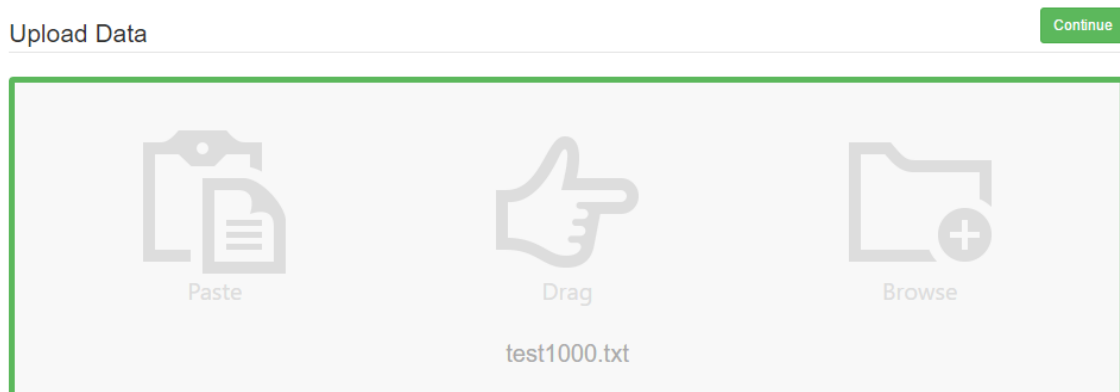
Mapping Fields

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	TrueDeceased.csv
Records	1,008
Create Date	1/26/2018 10:28:21 AM

Fields

Toggle Fields

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

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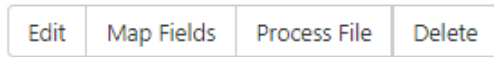
When your file is done processing, you will receive a notification at the top of the File Display page. You will also receive an email notifying you that your file processing is complete, so there is no need to stay on the page during processing.

Completed File

When your file is complete, make sure you check out your TrueDeceased 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 TrueDeceased 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@truedeceased.com.

Error	Reason for Error	Solution
File creation failed	Your file has no records.	Review your file and make sure it is following the TrueDeceased input guidelines.
The key has already been activated, please login with your credentials. If you are still having difficulty accessing your account, contact support at support@truedeceased.com.	Your account has already been activated.	Login using your username and 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.
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.
Invalid file or data.	Upload error: Wrong file extension.	Some initial requirements include: 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.
The same input field has been mapped more than once; please check your field mappings	Duplicate input fields have been mapped to separate system 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 page.
Your file had a problem while processing, but don't worry, we are already investigating the problem :)	The file may have failed during processing.	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@truedeceased.com for help.