



Data File Preparation Guidelines

Acceptable File Types

The preferred format for data files is a delimited CSV or Excel file, followed by DBF and tab-delimited TXT files, though we can work with any type of file.

For CSV (comma delimited) files, be sure to have the output with the following orientation: (“,”). Some of the CSV files that we receive require manual correction when intentional commas within a field cause a field to be split apart because the output did not have a comma and double quotes together. If the double quotes cannot be added because of your data system, we would recommend Pipe delimited (|) output, especially for larger files with over 60,000 records. For example:

John Doe, Jr.|ABC Company|1234 Main St|Anytown|US|12345-6789

Double quotes should only be used for delimited purposes and should not be within the data fields themselves. When double quotes are not used properly, the fields will split incorrectly.

We convert all other files types to CSV files for processing, and some file types require more time to convert than others. Sending CSV files will help move your project through production more quickly and avoid additional data processing costs. However, rest assured that we have the capabilities and expertise to handle your data in any format.

Secure File Transfer

Uploading your files to our website is the fastest, most secure and most efficient way to send us your data files, matrices, variable copy, and artwork. Your files will be completely safe and will enter into our system instantly, alerting our Prepress, Data Processing, Customer Service and your salesperson immediately upon their arrival. We can download files from your FTP site if this is what your company requires for security purposes. E-mailing files is not recommended because this is not a secure method, and there is always the chance that they may be overlooked or not get into the right hands quickly enough.

File Headers

Please include a header row in all data files so that each column of data is identified. The format we suggest for standard column headers in data files is as follows:

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---------|------|--------|-------|--------|-------|--------|----------|---------|------|-------|-----|
| 1 | ACCTNUM | NAME | PREFIX | FNAME | MIDDLE | LNAME | SUFFIX | ADDRESS2 | ADDRESS | CITY | STATE | ZIP |

Please take care not to include duplicate field names/headers in your data files, empty headers, or unclear header names. If levels, categories, tiers, or cell codes are used in your matrices, please label the header record with the header *LEVEL*.

When using variable coupons on your mailpieces, columns containing coupon data should be labeled to match the corresponding coupon such as *COUPON1*, *COUPON2*, *COUPON3*, and so on. More complex coupons such as those with variable offers and barcodes could be labeled as *COUPON1B* and

COUPON1Ba, instead of *FOOD1* and *FOODBARCODE1*, for example. If a *date of birth* field is contained in your data, we suggest that this field be labeled *DOB*.

When supplying multiple files, please make sure that all headers are consistent in format and spelling so that common field headers match exactly in each file. This will speed the processing of your files and help avoid additional programming charges. In addition, making sure your files have consistent formatting *every time* you submit a file to us will help us know what to expect so that we can process them more quickly in future runs, which will also help us keep your costs down.

Multiple Files

If multiple data files will be used for one mailing, please format both files in the same way with the same headers as mentioned in the previous section. Depending on the project, it is likely optimal for you to put them together into a single mail file, with a *TYPE* field to designate the differences between the records. For example, a casino client may have a database containing *Slot* players, and another containing *Table* players; since these two groups receive different coupon offers, this customer would use the *TYPE* field to designate who is *SLOTS* and who is *TABLES*. Doing this in such cases will reduce processing time and is also more reliable.

When sending separate data files cannot be avoided, a field declaring the name of the file is helpful so that when we merge the files together, we will know from which file the record originally came. We usually create this field on our end when combining files for one mailing.

Seeds

Seeds are records that you might add to your data file for your internal quality control purposes. Your seeds may include yourself, other members of your marketing team, upper management, or you may not wish to add seeds. If we will be adding seeds to your mail file, please furnish specific seed instructions along with your data files. When a mailing includes multiple art versions or data levels/segments/tiers/recipient groups, please provide instructions explaining which version(s)/level(s) should be seeded. For example, one client may want their seed recipients to receive one mail piece from each art version, while another client may only need their seed recipients to receive one particular version of the mailer. Please keep in mind that seeding all art and/or data versions can become costly if there are a large number of segments in your data, and depending on the size of your seed file.

These are a few ways that we recommend seeds be provided to us, in the order of preference:

- Embed seeds into your database, in which case no special instructions or processing are required on our end because the seeds are processed in with the regular mail file.
- Furnish a seed file to us along with your data file(s), which we will then combine with the data file(s). If your data file includes multiple levels or art versions, please indicate which levels/versions should be seeded.
- If your seed file is consistent for each job, you can send us your seed list to keep on file for use in all of your mailings, and send us updates as they occur. Many of our clients prefer this method, and send us new seed lists as they are updated. We then link to the most recent seed list in all mailings unless instructed otherwise.

Samples

If you would like samples of your mailer, please provide specific instructions as to whether you would like your samples to be print-only samples (no variable data), or variable samples, which will include an example of the variables included on the mailer. If you would like variable samples, please specify exactly which name, and/or offer should be used on the samples. Our customers will commonly ask that we either show his or her name on the samples, or a generic name such as "John Sample". Please also specify the quantity of print-only or variable samples you would like to have, or the quantity per version or level/recipient group if applicable. We recommend that samples are requested in the form of seeds when possible, which will be run as part of the job and come to you in the mail.

Matrices

A matrix is typically an Excel spreadsheet which shows us exactly how to match data, offers or coupon copy and art or variable data versions. When possible, please use one matrix instead of several separate matrices, as having all matrices for a single project in a single sheet is ideal and will help decrease processing time. We prefer a flattened matrix, which will help us process your data more quickly, though we are certainly able to process multiple-level matrices.

It is important that you supply us a “key field” between your data and matrix so that we will not need to figure out how to link the two and risk doing so incorrectly. Please be sure to clearly explain which data segments/levels use which art versions. Be sure to format fields properly as well, such as by keeping dates in date format, so that we can avoid having to convert them. Taking these steps will help avoid errors.

Coupon or Letter Copy

Please furnish all coupon copy, letter copy, or other text copy in a format such that will not require us to re-type the text. This will greatly reduce the chance for error. If entire coupons change with each mailing, it is preferred that those coupons be furnished to us in PDF format, and then new PDFs should be supplied each time a coupon is to change. Particularly on mailers with variable coupons, providing these in PDF format will allow us to automatically link the coupons easily to the database. If a coupon will remain relatively the same each time except for a change in date, for example, a simple Word document containing the new date will work fine. Please also refer to the section *File Headers* above for information on creating proper file headers for coupon data.

Variable Images

Variable imaging is the process of printing data or images that vary or change throughout the run. This is done digitally, such as on our black-and-white high-speed lasers or our color digital presses.

If printing shells on one of our offset presses, variable data could be applied on our lasers. This process is usually done when there are little or no changes to the artwork between each piece, and all variable copy that changes can be applied with our lasers using black ink. If a mailer has only a few artwork versions, this may still be the most economical way to produce the piece. Please keep in mind that when lasering variable data, the shell artwork under the laser copy must be screened at 30% or less in order for the laser toner to adhere properly to the paper.

When using our color digital presses, we are able to print art *and* variable data at the same time. With this process, nothing has to remain the same between each piece and art and data may vary. This process would be used to apply color variable copy or images to a mailer, such as a different person’s photograph, a different name reversed out of color artwork, or an entirely different art version for each piece or art versions mixed in postal sorting order throughout the run. Variable color images may only be used when printing a job digitally.

When we produce a mailer with different versions of art to be used as variable images, please supply specific written instructions to explain how to match art and variable data. The more clear and obvious the instructions are, the smaller the chance for error will be.

Additional Questions about Data?

If you have additional questions about data file preparation, please contact your salesperson or CSR, who can help you get the answers you need. If you would like to discuss specific data formatting issues in greater depth, please request to speak directly to a programmer for guidance or assistance.