FRANKLIN
Data Empowered Direct Marketing

DATA File Preparation Guidelines

1. Acceptable File Types

Though we can work with any type of file, the preferred formats are **delimited CSV** or **Excel**, followed by **DBF** and **tab-delimited TXT files**.

For CSV (comma delimited) files, be sure to have the output with the following orientation: (","). Some CSV files 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 can't 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, we have the capabilities and expertise to handle your data in any format.

2. Secure File Transfer

Uploading your files to our website is the most efficient and secure way to send us your data files, matrices, variable copy, and artwork. Your files will be completely safe and will enter our system instantly, alerting our Prepress, Data Processing, and Customer Service departments, along with your salesperson, immediately upon receipt.

We can download files from your FTP site if this is what your company requires for security purposes.

E-mailing files is not recommended as it isn't a secure method, and there is a chance that they may be overlooked and not get into the right hands quickly enough.

Access our FTP site by going to: **gofranklingo.com**

Then click on "Send A File" or "Login to Client Portal" in the upper right-hand corner.

Contact Us	Send A File	Login to
Company Directory	Upload your files now	Client Portal

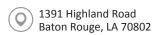**BATON ROUGE | MEMPHIS**

3. 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, empty headers, or unclear header names in your data files. 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 (ie. **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 processes them more quickly in future runs, which will also help us keep your costs down.

4. Multiple Files

If multiple data files will be used for one mailing, please format both files in the same way (ie. same headers) as mentioned in section three. Alternatively, it might be optimal to combine them all into a single mail file, with a **TYPE** field to designate the differences between the records.

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 can't 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.

6. 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.

7. 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, use only one matrix for a single project instead of several separate ones, as it will help decrease processing time.** We prefer a flattened matrix, which helps us process your data more quickly, though we can certainly 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 now to link the two and risk doing so incorrectly. Please clearly explain which data segments/levels use which art versions. Also be sure to format fields properly by keeping dates in date format, so that we can avoid having to convert them. Taking these steps will help avoid errors.

5. 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, etc.

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.

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 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. Many of our clients prefer this method, and only send us new seed lists if updates have been made to the file. We then link to the most recent seed list in all mailings unless instructed otherwise.

8. 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 new PDFs be supplied any 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 remains fairly consistent, 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** in section three for information on creating proper file headers for coupon data.

9. Variable Printing

Variable printing is the process of printing data or images that change throughout the run.

At Franklin, we achieve this using a couple different processes, and whatever process we ultimately end up using is determined by the overall scope of the project.

Color Digital Presses

Especially economical on jobs with small print quantities, we are able to print **4-color artwork + 4-color variable data (images or text)** simultaneously on our color digital presses. Nothing has to remain the same, meaning art and data may vary from one piece to another. This can include changing up salespeople's photographs, names or signatures, entirely different base artwork for each piece, or art versions mixed in postal sorting order throughout ONE run.
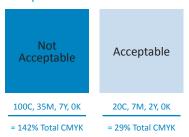
NOTE: Variable 4-color images or text may only be used when printing a job digitally, as is reversing variable text out of, or adding 4-color variable text against, a background.

Offset Press + High-Speed Black-and-White Laser Printing

For jobs with large print quantities, it is typically more cost-effective to print **4-color "shells"** (base artwork) on one of our offset presses, then apply **black-and-white variable data** afterwards on one our high-speed laser printers. You might have one or more shell versions, each differing slightly depending on data segmentation (Example: A casino may have one shell with imagery pertaining to table games, while another may have imagery pertaining to slot machines).

Tip: When printing black-and-white variable data onto a pre-printed shell, in order for the laser toner to adhere properly to the paper, the area where the data is to be applied should be screened to no more than 30% of cyan, magenta, yellow and black combined.

Example:

Not Acceptable	Acceptable
100C, 35M, 7Y, 0K	20C, 7M, 2Y, 0K
= 142% Total CMYK	= 29% Total CMYK

When we will be producing a mailer with different versions of art, to be used as variable images, please supply specific written instructions to explain how to the match art and variable data. Clear and obvious instructions help reduce the chance for errors.

10. 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.