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# TrueNCOA's Input File Guide

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## Quick Overview

- File must be a .csv, .txt, .xls, or .xlsx.
- Any of the file types above can be singularly zipped into a zip file folder and uploaded.
- Only one file should be zipped and uploaded.
- File must contain: First Name, Last Name (or Full Name), Address 1, City and State Code (and/or Zip Code).
- 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.
- Free Processing: Users may run their file several times (for FREE) and can review the TrueNCOA Report to decide which file they would prefer to purchase and download. We always encourage users to review their file for errors or incorrect data prior to uploading and processing.

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

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## Field Requirements

Users must include certain fields to run a file with TrueNCOA. These fields are required by the United States Postal Service to return corrected addresses and give the user the most accurate information. To upload a file, TrueNCOA requires the following fields:

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

We encourage users to include as much address related information on their upload file as possible, including: Input ID, Address ID, Address 2, and Postal Code. These fields should be populated and have the appropriate headers.

### Parsing

Our updated name parser identifies multiple names included in the same row and splits them into multiple rows to ensure both names are processed. For example, if your file had a row with "John and Jane Doe" in the full name field, or "John and Jane" in the First Name field and "Doe" in the Last Name field, our parser can identify that "John Doe" and "Jane Doe" are different people and process them separately. This maximizes coverage and can sometimes help TrueNCOA find additional moves on your file.

Please be mindful that if you have multiple names within a single record and both persons listed have a move, then you could receive up to two returned records per person within a single record. (2 persons with moves will return 4 export rows)

Read more in [Advanced Options](#).

### 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 TrueNCOA as it allows USPS 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.

### Other Name Fields

Other name fields are accepted during mapping: Prefix, Middle Name, Suffix. These fields are optional and can be mapped fields. If mapped, we will use these fields during your processing, and they will be used by USPS to match to move addresses.

### Address 1

TrueNCOA 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.

### Care of or Attention Information

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. These extra address details shift the actual address to Address 2, therefore causing the system to read it incorrectly. Your address will be identified as invalid by USPS.

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If you have company name, read the *First Name and Last Name (or Full Name)* section above.

### City and State Code, or Postal Code

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

We recommend giving all three city level location fields to help the USPS find the correct address, but some errors could still occur. If you decide to map all three fields, each record should have City, State Code, and Postal Code data included. Meaning every field has data in it. Some users may benefit from only mapping City, State Code. Whereas others may benefit more from only mapping Postal Code.

Only State Code is accepted (2 characters); state name will be shortened to only use the first two characters of the name. If you do not have State Code, we encourage you to only map to City and Postal Code. State name can be mapped as a pass-through.

### 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). You can also update the column to use special formatting, but you'll need to do this every time you open your file in excel.

If you have City and State Code listed on your file, feel free to map City and State Code instead of Postal Code. City and State Code are acceptable locations for the USPS NCOA process.

Additionally, using a CSV or TXT file and not opening the file within Excel will help you to avoid this issue all-together.

### Pass-Through Fields

If your file contains data fields that aren't required for NCOA 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.

### Fields to Avoid

While TrueNCOA accepts many fields during our mapping, there are certain field names or phrases that you should avoid.

- record\_id
- Zip5
- Zip4
- Fields prefixed with 'input\_'

The inclusion of these fields and phrases will cause your file to error at different times, so while your file may import successfully, it may error during processing. Or your file may complete processing successfully, but then your export will error.

## TrueNCOA Recommended Mapped Fields

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

✓	✓
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	

## File Requirements

The files used for processing must follow certain rules as well.

### File Types

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

- Comma-Separated Value files (.csv)
- Tab Delimited files (.txt)
- Excel files (.xls; .xlsx)
- One of the above + Zip File Folder (.zip)

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 a series of fixed-size streams. All the data is contained in records that have headers, which give the record type and length. [View an XLS or XLSX File.](#)

A zip file folder is a folder that compresses large files to be transferred more easily. If you use a zip file folder, you should only have one file within the folder. TrueNCOA is able to upload a single file (csv, txt, xls, xlsx) that has been compressed in a .zip file. Sometimes apply computers will include hidden files within your zip file folder; so make sure you check for those and exclude them.

You should not use a Word document or Microsoft Access file.

### File Format

The rows within your file should be formatted to have each field header in the first row. These headers should have their own column. For example, City and State Code should be formatted to be City in one column and State Code in a separate column.

See the following examples:

**Using Full Name**

Full Name	Address Street	City	State Code	Zip Code
	1			
Jane Doe	123 Main St	Chicago	IL	60647

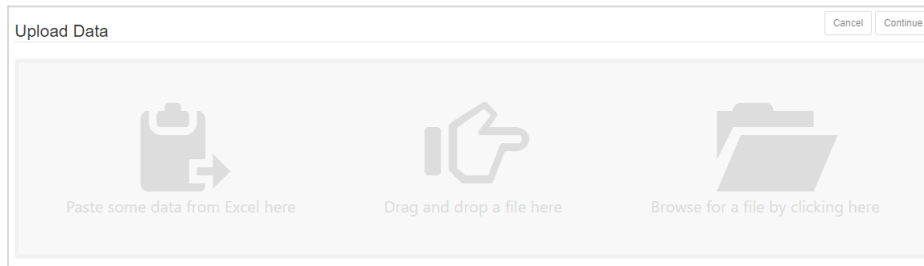
**Using First and Last Name**

First Name	Last Name	Address Street 1	City	State Code	Zip Code
Jane	Doe	123 Main St	Chicago	IL	60647

## Processing Your File

### Upload

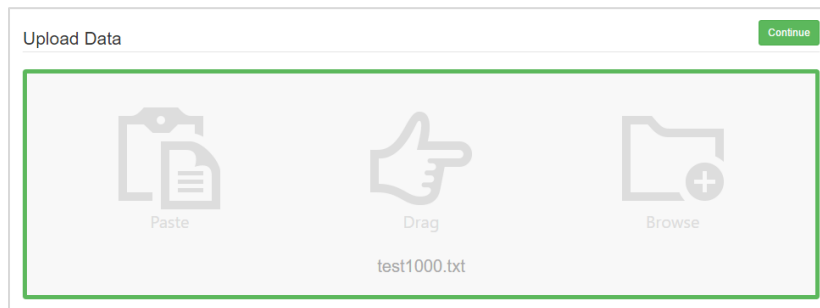
Users can upload a file right from our homepage. Upload your file one of three ways: Paste, Drag/Drop, and Browse.



1. **To Paste:** User should 1) open their file; 2) copy all rows including the header; 3) and paste into the Upload Box. Users should paste near the Copy/Paste icon.
2. **Drag/Drop:** User should 1) click on their file and drag it 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: All files should be selected from their original file source. Using a file from recent files or frequent folders may not upload successfully.

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.

**Id** 56066

**Status** Created

**Name**

**Records** 1,009

**Create Date** 4/8/2019 4:23:16 PM

**Fields** Toggle Fields

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Advanced Options

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	1	<input style="border: 2px solid green;" type="text" value="Id"/>
first	Christopher	<input style="border: 2px solid green;" type="text" value="First Name"/>
last	Klimko	<input style="border: 2px solid green;" type="text" value="Last Name"/>
full name	Christopher Klimko	<input style="border: 2px solid blue;" type="text" value="Pass-Through"/>
address1	3000 Westminster Ave	<input style="border: 2px solid green;" type="text" value="Address Line 1"/>
address2		<input style="border: 2px solid green;" type="text" value="Address Line 2"/>
city	Dallas	<input style="border: 2px solid green;" type="text" value="City"/>
state	TX	<input style="border: 2px solid green;" type="text" value="State"/>
zip	75205	<input style="border: 2px solid green;" type="text" value="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.

### Green Mapping Fields

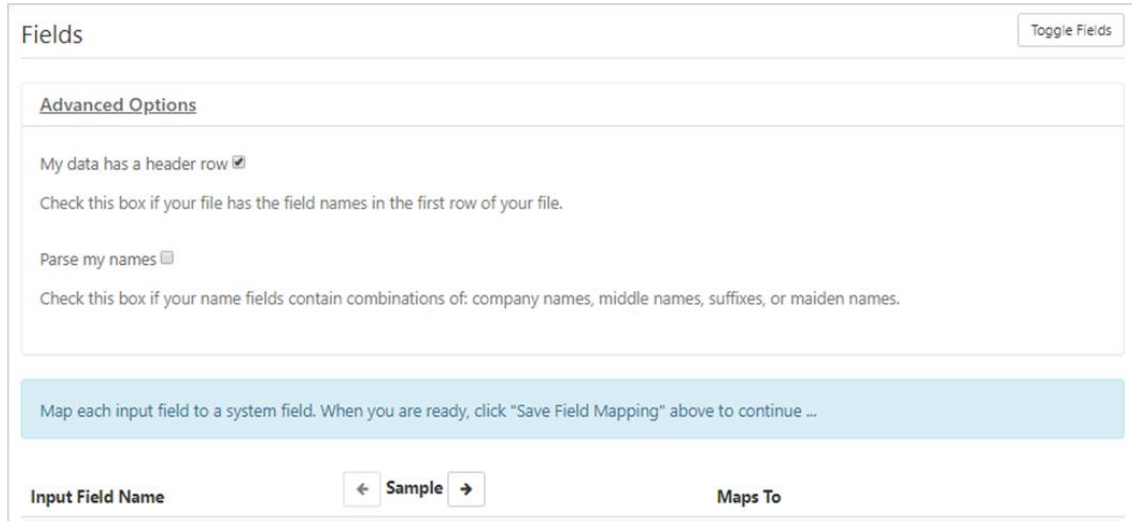
TrueNCOA's system is constantly attempting to learn to assist you in mapping your fields for you. The continued use of the same field names will assist with this function.

The green indication on the mapping page does not mean that your mapping is accurate. It simply means that the system recognized your input field name in order to map it to a TrueNCOA field name. For example, if you include both Full Name and First/Last name, Have an issue? Please contact [support@truencoa.com](mailto:support@truencoa.com) for help.

then the system will map both of those and mark it green. Clicking save will error as only First Name and Last Name OR Full Name is accepted.

### Advanced Options

TrueNCOA provides two advanced settings: *My data has a header row* and *Parse my names*. These are always available on the mapping page. To access these settings, click Advanced Options.



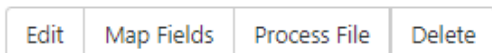
The screenshot shows a 'Fields' configuration window with a 'Toggle Fields' button in the top right. Below the title bar is a section titled 'Advanced Options' containing two checkboxes: 'My data has a header row' (checked) and 'Parse my names' (unchecked). Each checkbox has a descriptive text below it. Below the 'Advanced Options' section is a light blue instruction bar: 'Map each input field to a system field. When you are ready, click "Save Field Mapping" above to continue ...'. At the bottom, there is a table header with 'Input Field Name' on the left, a 'Sample' button in the center with left and right arrows, and 'Maps To' on the right.

My data has a header row is selected by default. The majority of users will upload a file with headers. However, this is not necessary. If you do not have header rows, uncheck this box. Then, a form will pop up and you can provide header names for your records. This ensures that your top row of data is processed as a record and not as headers.

Parse my names is deselected by default. TrueNCOA will not parse your name fields if you have mapped to First Name and Last Name. This is because your file is already parsed. However, if you have more than one name in your First Name field, you should select Parse my names. It is important to note that we ALWAYS parse names that are mapped to our Full Name field.

### 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.



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 [TrueNCOA 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 TrueNCOA only supports csv, txt, and xls, or xlsx files and zip file folders!

Check the table below to find your error. If you received an error that is not in this table, please contact [support@truencoa.com](mailto:support@truencoa.com).

Error	Reason for Error	Solution
File creation failed	Your file has no records.	Review your record and make sure it is following the TrueNCOA 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 <a href="mailto:support@truencoa.com">support@truencoa.com</a> .	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 '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
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 page.
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 required fields. 3. You have more than one file within a zipped file folder.
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 in the NCOA 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 <a href="mailto:support@truencoa.com">support@truencoa.com</a> for help.