 TrueNCOA

TrueNCOA's Output File Guide

Contents

Overview

TrueNCOA's Output File Guide describes how to export, download, and understand the TrueNCOA data. Once your file is in a status of "Completed", you define your export and download your data. Depending on which layout and fields you select, you may have to interpret the output differently. For the purposes of this document, we have used the "Shared Layouts: Default Layout". The general process is as follows:

1. Import data by uploading a file or pasting data
2. Map your import file fields to the TrueNCOA system fields
3. Submit the import file for Processing
4. Review the TrueNCOA Report to determine if you want to purchase the results
5. Pick your export template
6. Download and extract the data you need for mailing or to update your CRM
7. Please refer to our Data Dictionary to view all fields and descriptions.

Definitions

- Import file – this is the file uploaded to TrueNCOA and what is processed.
- Import field – this is a field included in the import file uploaded to TrueNCOA and is used during processing.

Have an issue? Please contact support@truencoa.com for help.   1

- Export file – this is the file exported from TrueNCOA and has been processed through NCOA.
- Export field – this is a field included in the export file downloaded from TrueNCOA.
- Address ID – Address_ID is unique to each address. If a person has moved they will have separate address IDs for their old and new addresses.

Exporting A File

When your file is in a status of "Completed", you can click the "Export" button located at the top of the file display page.

Files > test500.txt

Edit   Export   Delete
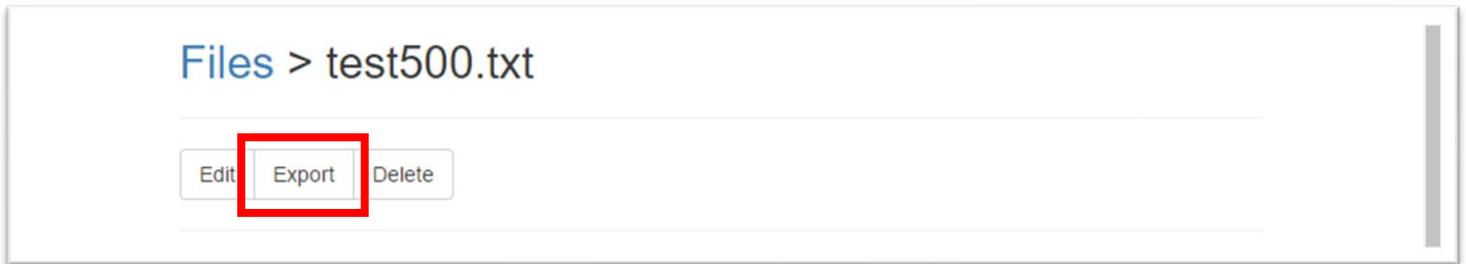
This will direct you to the export page, where you select your layout, choose which fields to export, and have the option to rename the output fields.

test500.txt > Export

Download

Details

Type	Import
Status	Processed
Name	test500.txt
Records	500
Create Date	4/28/2017 8:51:28 AM

Layout

Default Layout ▾

☑ **Field**	**Output Field Name**
☑ City	input_City
☑ State	input_State
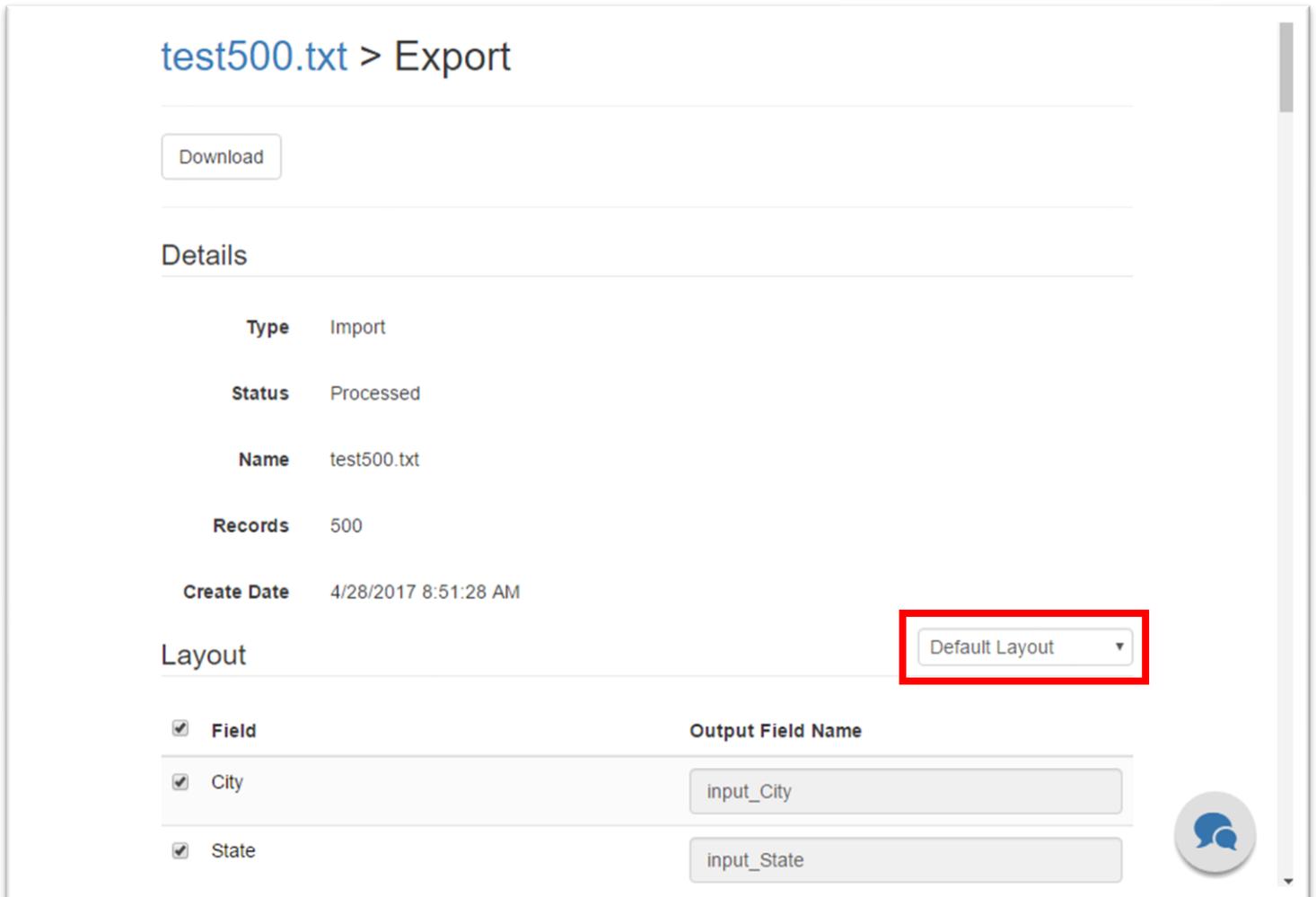
On this page, there is nothing more to do unless you wish to customize the export file, which is not required. The default selections will return all data and all fields.

Optional Steps

- Choose your Layout by selecting a Layout from the drop-down list to the right of the "Layout" label. Read more about the different Export Templates below.
- Select or deselect the export fields you wish to include/exclude in your export file.
- Rename the export fields as you wish. NOTE: you cannot rename the import file fields on the export, they are prefixed with "input_" by default to eliminate confusion. You should also take care to not duplicate any field names you rename; each export file field name must be unique.

Once you are satisfied with your selections, you can download your export file by clicking on the "Download" button at the top. You will need a minimum of one (1) credit to download the export file. The system will prompt you twice before you use a credit, so there should be no concern about accidentally using a credit.

The download will start automatically, and your export file will be placed in a ZIP file. You can open this file to find your NCOA'd file. Once you have downloaded and opened your file, you are ready to explore the data returned to you - including updated addresses!

Export Templates

There are six export templates available for use. In addition, there are Proper – Cased versions of each of these templates. This allows you, the user, to export your name and address fields in Proper Case format.

1. **Default Layout**: This layout includes all of the fields you have come to expect on a TrueNCOA export.

2. **Mailable Records Layout**: This layout returns all records that are considered deliverable by the USPS. These include all Current and Active records and exclude vacant, invalid, and failed DPV records.

3. **Non-Mailable Records Layout**: This layout returns all records that are considered non-deliverable by the USPS. These include all Historical records and Active records that failed DPV or are vacant and invalid.

4. **Updated Records Layout**: This layout returns all records that were updated by the DPV and NCOA process. These records should be updated in your database. These records include Current records and records that have been standardized to the USPS preference.

5. **Basic Layout**: This layout returns your top-level fields needed to make your database update decisions. The fields returned include name fields, address fields, vacant, invalid, residential delivery indicator, and move data.

6. **Move Records Only Layout**: This layout returns all fields but only includes records where move data was found. This will include all 0-48 month moves and any move, no forwarding addresses.

7. **Standardized with Moves**: This layout returns all fields but only one row per input record. This means that you will not receive both a historical and current row when a move is found. Instead, you'll receive either the Historical record if it was a move with no forwarding address, or the Current record if a move was returned.
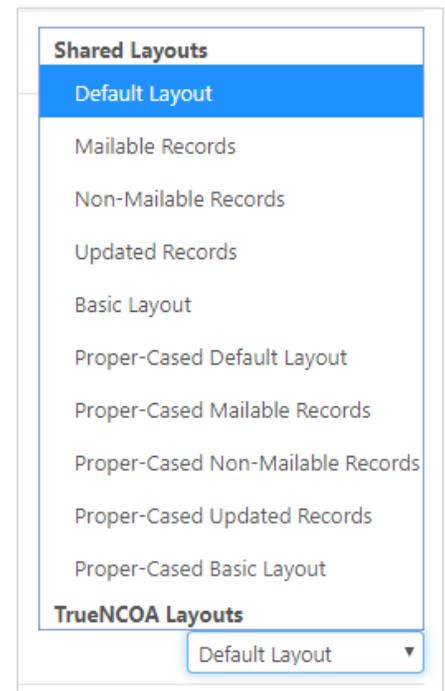
Do you have an annual contract with us and are interested in a custom export? Contact us!

Export Fields

The fields returned include your input fields plus standard NCOA fields. These include name, standardized addresses, address type, record type, updated addresses, residential delivery indicator, carrier route, vacant addresses, etc. To see all returned fields and review your definitions, check out our Data Dictionary located on our FAQ page (http://truencoa.com/faq/).

Updated File Export

Effective 5/1/2023, TrueNCOA will sunset the free update feature for any client that does not have a 501(c)(3) status. If you are interested in having updates included in an annual contract, please contact us at support@truencoa.com)

TrueNCOA automatically re-processes your active file(s) every week. Active files are those that were first processed within the last 95 days. This free, complimentary service helps you get as many standardized and updated addresses as possible. This process runs your addresses with a record_type of either Active or Current through TrueNCOA to check for additional moves. When we find additional moves, we'll send you a notification email with a link to download them. This supplementary file will only have your new moves, so it will probably be just a few rows of data. It's FREE to download within the 95 days, and ready to use. We don't aggregate these results, so you'll have to download the results via the custom link in each alert email. You may receive several notification emails during those 95 days, and you'll get the most out of the service if you download the results from each notification.

To access the update file, you can navigate to your files and access the updated file with a file name: "YOUR FILE NAME – Updated YYYYMMDD". Example: test1000.csv - Update 20170825. Once you are on this page, click the export button; you will then be redirected to the Download page. Review the fields and then click download. You will be prompted to confirm your download, click OK. Your file will now download to your computer.

This update file is free to download, but YOU MUST PURCHASE YOUR ORIGINAL FILE before having access to download the update file. To export your original file, see Exporting a File.

Additionally, we continue to process updates for your files forever. Whether you never purchased, or are outside your 95 days, you will continue to receive updates on your file, so you are always aware of how up to date your file is! To stop receiving updates, either delete your file in the app, navigate to each file and click the Update Toggle to Off. To turn off ALL updates, navigate to your User Settings, and click the Update Toggle to Off. This will prevent you from receiving any additional updates.

Understanding Your Processed File

With each file, you will receive a plethora of information. Using Excel sorting and filtering techniques, you can find identified updated addresses for 18-month moves, identified updated addresses for 48-month moves, residential delivery identification, delivery point verification, identified move types, identified address types, identified vacancies, plus more!

Finding Updated Addresses

Finding updated addresses is easy. With the TrueNCOA default layout, your download will mark updated addresses as Current in the record_type field (the field will contain a C for *Current*). TrueNCOA returns updated addresses as an additional row in your output. This allows us to give you full information on your input address AND full information on your updated address.

Sample of how an updated address is returned. *Note: Not all export fields are included in this picture.*

The quickest way to find updated addresses is to filter Record Type. Record Type returns one of three results: A, C, H.

Value	Meaning	Description
A	Active	When an address is marked "Active", it means that the change of address process did not find a move record. This address may not be current if the contact moved and did not file a change of address with the United States Postal Service.
C	Current	When an address is marked "Current", it means that the change of address process found a move record. This address is considered current.
H	Historical	TrueNCOA updates a record_type to "Historic" when an address you included on your upload is identified as a previous address by the change of address process. The Postal Service has a record of your contact at this address, and may also have a new address on file.

If you filter the field to show C – Current, you will receive all updated addresses that were returned in your file. These addresses will have an input_id that matches its historical record's input_id. Using this input_id will allow you to update the addresses easily.

If you filter the field to show both H -Historical and C – Current, you will receive all updated addresses and the corresponding, previous address. These will always be displayed with the historical address in the top row, and the current address in the following row. Filtering by both Historical and Current record types gives a clearer understanding of what has changed between the two addresses. For example: The constituent may have moved from a single-family home to a high rise.

48_Month Moves
To find 48-month moves, filter the ANK field to only show the number '48'. These are records that are identified by the USPS as persons that have moved within the last 19-48 months. If there was an updated address available, it will have a Record Type of 'C' for current. Not all 48-month moves have an updated address. To learn more about why it may not, look at the value returned in the NXI field.

Move Map
When TrueNCOA finds an 18-Month or 48-Month move for one of your records, we provide you with the updated address. We refer to the original and updated addresses as the Historical and the Current addresses respectively. Each of these addresses is plotted on the Move Map with a line drawn between them. Each line has a gradient feature indicating the direction of a move. You can view this map, located below the TrueNCOA Report, before you purchase and download your results.
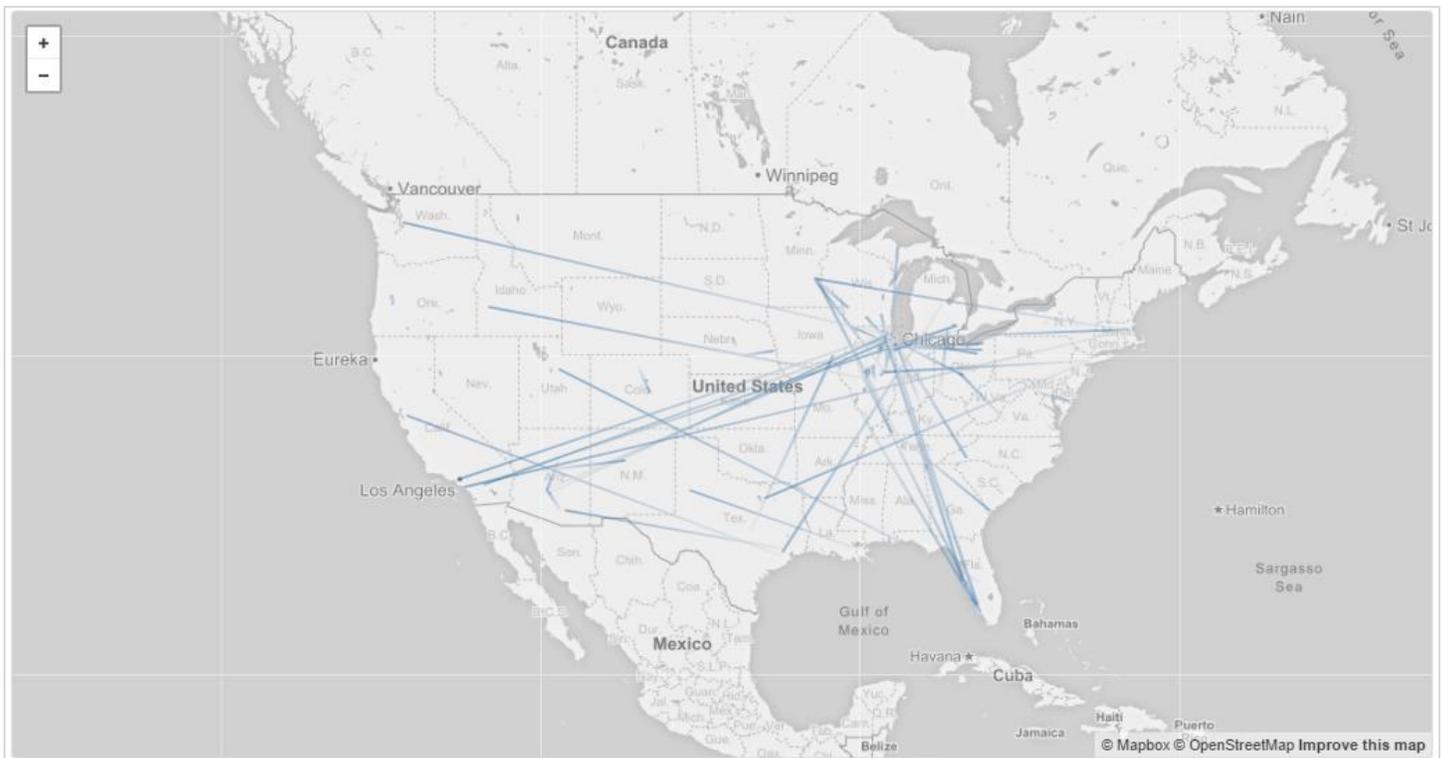
After you purchase and download your results, the plotted addresses allow you to select and view the different moves present in your file. The historical address is represented by a grey box labeled with its address_id, while the current address is represented by a blue box labeled with its address_id. The line will start at the From address in a grey color. As it approaches the To address, the line color will transition to blue. You can see this in the image above. When you click on a line between two addresses, the markers will stand out. Clicking on a marker will show you address information for the historical address (the From address) and the address information for the current address (the To address).

Mailable Addresses

Any address with a record_type of C or A are mailable addresses according to USPS. You can find these addresses by filtering your file and selecting A (Active) and C (Current) on the record_type field. Remember, you can use the Mailable Addresses Export Template to download these fields.

1. Navigate to the field named record_type
2. Filter column and select A and C
   a. A = Active; no move was applied. NOTE: this may or may not be the current address
   b. C = Current; move was applied and this is the current record.

ascending_descending	record_type	record_source	country_code	address_line_1	address_line_2	address_id	household_id	individual_id
A		PN	US	3000 WESTMINSTER AVE		453	477	132
A		PN	US	9696 NEW BUFFALO RD		996	449	252
D		PN	US	515 BROOKPARK DR		680	199	443
A		PN	US	114 MILL CREEK DR		68	354	774
D		PN	US	4120 KIRK RD		585	612	121
D		PN	US	28 BOB WHITE CT		423	704	395
A		PN	US	1155 PAIGE AVE NE		72	564	820
D		PN	US	120 W LYTLE AVE		90	488	498
A		PN	US	190 SOUTHWOODS AVE		263	883	428
A		PN	US	6210 WARREN SHARON RD		763	215	502
D		PN	US	1714 HAMILTON PL		239	899	972
A		PN	US	1751 DAMOS WAY		243	881	685
D		PN	US	496 S BRIARCLIFF DR		663	392	758
A		PN	US	2679 S HUBBARD RD		406	643	670
A		PN	US	6662 NW 98TH DR		800	375	248
A		PN	US	250 PARKVIEW DR		382	573	606
A		PN	US	2818 CITADEL DR NE		429	890	727
A		PN	US	1444 ROBBINS AVE		182	403	877
D		PN	US	3418 SANDALWOOD LN		503	708	278
A		PN	US	645 HIGH ST		782	121	512
D		PN	US	13324 MCCORMICK RUN RD		146	335	145
A		PN	US	5465 CHAPEL RD		712	431	547
D	A	PN	US	401 MOORES RIVER DR		567	574	720
A	A	PN	US	1237 FOUR WINDS CT		107	557	234
D	A	PN	US	6373 TARA DR		774	1014	505
A	A	PN	US	2830 SPRING MEADOW CIR		432	519	549
D	A	PN	US	8031 FOREST LAKE DR		908	101	437
D	A	PN	US	2314 BELL WICK RD		354	788	293
A	A	PN	US	150 TALSMAN DR	UNIT 1	196	192	431
D	A	PN	US	859 PASADENA AVE		954	256	661
A	A	PN	US	5750 CLINGAN RD		728	141	805
A	A	PN	US	7126 HARRINGTON AVE		846	194	367
A	A	PN	US	PO BOX 189		1013	1020	47
A	A	PN	US	340 TOD LN		499	526	312
A	A	PN	US	7834 HUNTINGTON CIR		884	67	577
D	A	PN	US	2057 BURNING TREE LN		292	746	92
D	A	PN	US	1216 WOODLEDGE DR		98	124	129
A	A	PN	US	4022 SUNSET BLVD		569	8	285
A	A	PN	US	522 W MIDLOTHIAN BLVD		691	596	57
A	A	PN	US	82 ALABASTER AVE		923	379	837
D	A	PN	US	24 NORWICK DR		363	701	316

Filter dialog options: Sort A to Z, Sort Z to A, Sort by Color, Clear Filter From "record_type", Filter by Color, Text Filters, Search. (Select All), A, C, H. OK / Cancel.

OUTPUT_test1000.txt

You should also review the validity of an address and check if it is vacant. These can be checked by filtering your file's *address_status* field and *vacant* field.

How to find a non-valid address?
1. Navigate to the field named address_status.
2. Filter column and select N and M to show addresses that are not valid.
   - V = Valid
   - M = Multi Match (typically missing a prefix or suffix in the address)
   - N = Invalid
3. Addresses with address_status = "N" and addresses with address_status = "M" should not be used.

Non-Valid addresses will need to be updated in order to send mail. Generally, they are flagged due to incorrect primary number, misspellings, or missing street directional.

How to find a vacant address?
1. Navigate to the field named *vacant*.
2. Filter column and select Y.
   a. Y = Vacant
   b. N = Occupied
3. Addresses with vacant = "Y" should not be used.

TrueNCOA

Frequently Asked Questions

Why do I receive Input Fields on my processed file?

Every file you export will include your input fields. This allows you to review what was sent in to TrueNCOA and compare it to the processed records.

Each of these input field names will be prefixed with 'input_'. If your input file had a field name of Address Line 2, then in the processed file, it would be input_Address Line 2. All input fields are positioned in the first several columns of your export. See picture below:

Note: Input fields are highlighted yellow for demonstration purposes only. Your downloaded file will not highlight input fields.

Why are there so many ID fields?

There are several ID fields returned in your export file. These ID s are used as unique identifiers. Input_ID and Record_ID are especially helpful when uploading files back into your CRM and uploading updated addresses. Address_ ID, Household_ID, and Individual_ID are helpful when finding duplicate records.

Field Name	Description
Input_[Unique_identifier]	This ID is the ID that you have mapped to our system and what is uploaded from the original file. This ID is unique to each record.
Record Id	Record ID is a unique identifier given to your records by our system. Different from Name ID, this ID is unique to each input record. This Record ID will be the same for moves with updated addresses.
Name Id	Name ID is a unique identifier given to your records by our system. This Name ID is different from Record ID. This Name ID will be the same for moves with updated addresses.
address Id	Address_ID is unique to each address. For Example: 123 Main Street, Chicago, IL will always have an Address_ID of 12345. The owner may change for this address, but the Address ID will always be the same.

Household Id	Household_ID, as the name states, is unique to each household. For example, Jane and John Smith's Household ID will always be the same for as long as they live at the same household. The Household ID is unique based off of both Individual Names and Addresses. This ID is different from the Individual ID.
Individual Id	Individual_ID is unique to each person. This ID is unique based off of the Individual Name and Address. Jane Smith at 123 Main Street Chicago IL will have an Individual ID of 35467, but if she moves her Individual ID will change as well because she is now Jane Smith at 1010 Brown Street, Chicago IL.

Does TrueNCOA de-duplicate my records?

Unfortunately, TrueNCOA's process does not de-dup the file, but we do provide ID's that allow you to de-dup your records quickly.

By using Individual ID, Household ID, and Address ID, you can find if there is a duplicate record in your file. By finding duplicates in each column separately, you can find any duplicate records. In the example below, this constituent is placed in the file six times. In each record, his Address ID, Household ID, and Individual ID are the same for each record.

	BG	BH	BI	BJ	E
	address_line_2	address_id	household_id	individual_id	
		456	481	133	
		456	481	133	
		456	481	133	
		456	481	133	
		456	481	133	
		456	481	133	
		999	453	253	
		685	200	443	
		70	357	778	
		590	617	122	
		426	708	395	

Note: Duplicate ID fields are highlighted red for demonstration purposes only. Your downloaded file will not highlight duplicate IDs.

You should remove any duplicate records, leaving just one in the file. Remember: duplicate records must have matching Address ID, Household ID, **AND** Individual ID.

Data Dictionary

The fields returned include your input fields plus standard NCOA fields. These include name, standardized addresses, address type, record type, updated addresses, residential delivery indicator, carrier route, vacant addresses, etc. To see all returned fields and review your definitions, check out our Data Dictionary located on our FAQ page (http://truencoa.com/faq/).