



How to Generate a Keytrack File for ScanStore

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Introduction

ScanStore requires a Keytrack file listing constituent information. The preferred file format for the Keytrack file is Comma Separated Values (CSV). Our ability to correctly identify forms with a constituent increases with the more detail provided. The primary file is used for current information and the supplementary files are used for historical or additional information. It is important that the data we are indexing against contains the latest information in order to appropriately identify forms. This may require you to periodically send *ScanStore* an updated Keytrack file.

1 Primary File – Required

Field	Description	Required
Database key	This must be the unique and non-changeable record identifier from your database.	Y
Primary reference		Y
Individual/Org Indicator	I = Individual O = Org	Y
Title	Only used for Individuals	Y
First name		Y
Middle name		Y
Last name		Y
Deceased Indicator		Y
Org Name	Only used for Orgs	Y
Preferred or Primary Address Line 1		Y
Preferred or Primary Address Line 2	Specify additional address lines as client's system supports	N
Preferred or Primary Address Line 3		N
Preferred or Primary Address Line 4		N
Preferred or Primary City		Y
Preferred or Primary County		Y
Preferred or Primary Postal Code		Y
Preferred or Primary Country		Y
Primary Bank Sort Code	Optional if you are uncomfortable with sending such details; however the information improves your chances for a correct match. If you want to export multiple accounts, the bank details in the Primary Keytrack can be omitted and the supplementary Bank Keytrack supplied instead	N
Primary Bank Account Number		N
Constituent Pays Tax	Yes/No field. Although optional, the information should be provided if it has been tracked.	N
Declaration Indicator	Written, Oral, etc.	N
Declaration Start Date		N
Declaration End Date		N

Supplementary Files for ScanStore

ScanStore's goal is to match or identify an image with a constituent in your database. The more information you provide us, the better chance we have of matching or identifying the constituent with the image. Therefore, we strongly suggest you include in your export file constituents' previous known addresses and banks, along with any other fields you may include on your mailings.

2 Secondary Unique Reference File – Optional

Secondary Reference Numbers are usually organization specific and may be used to track non-product specific data. This field can be used for a variety of secondary unique reference numbers – such as URN's from previous legacy databases or URN's captured by 3rd parties such as Fulfillment houses, telemarketing companies, or face to face fundraising that generate their own URN. You should specify 1 to n alternate fields to use that may have been used on generated forms.

Field	Description	Required
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y
URN1		Y
URN2		N/A
...		N/A
URNn		N/A

3 Previous/Additional Address File – Optional

Previous addresses could represent a previous living address in which a gift aid declaration form was sent to and returned.

Field	Description	Required
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y
Previous or Additional Address Line 1		Y
Previous or Additional Address Line 2	Specify additional address lines as system supports	Y
Previous or Additional Address Line 3		Y
Previous or Additional Address Line 4		Y
Previous or Additional City		Y
Previous or Additional County		Y
Previous or Additional Postal Code		Y
Previous or Additional Country		Y
Previous or Additional Address Valid To Date	Specify a date if your system allows you track the validity of an address by date.	N

4 Previous/Alternate Bank File – Optional

Previous bank details could represent a previous bank in which a donation or direct debit was processed.

Field	Description	Required
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y
Previous or Alternate Bank Sort Code		Y
Previous or Alternate Bank Account Number		Y

5 Multiple Declarations File – Optional

If your system allows you to track multiple declarations per constituent, then include this information.

Field	Description	Required
Database key	This is the pointer back to the unique and non-changeable constituent record identifier.	Y
Constituent pays Tax	Yes/No field	Y
Indicator	Written, Oral, etc.	N
Declaration Made		N
Declaration Start Date		Y
Declaration End Date		N