

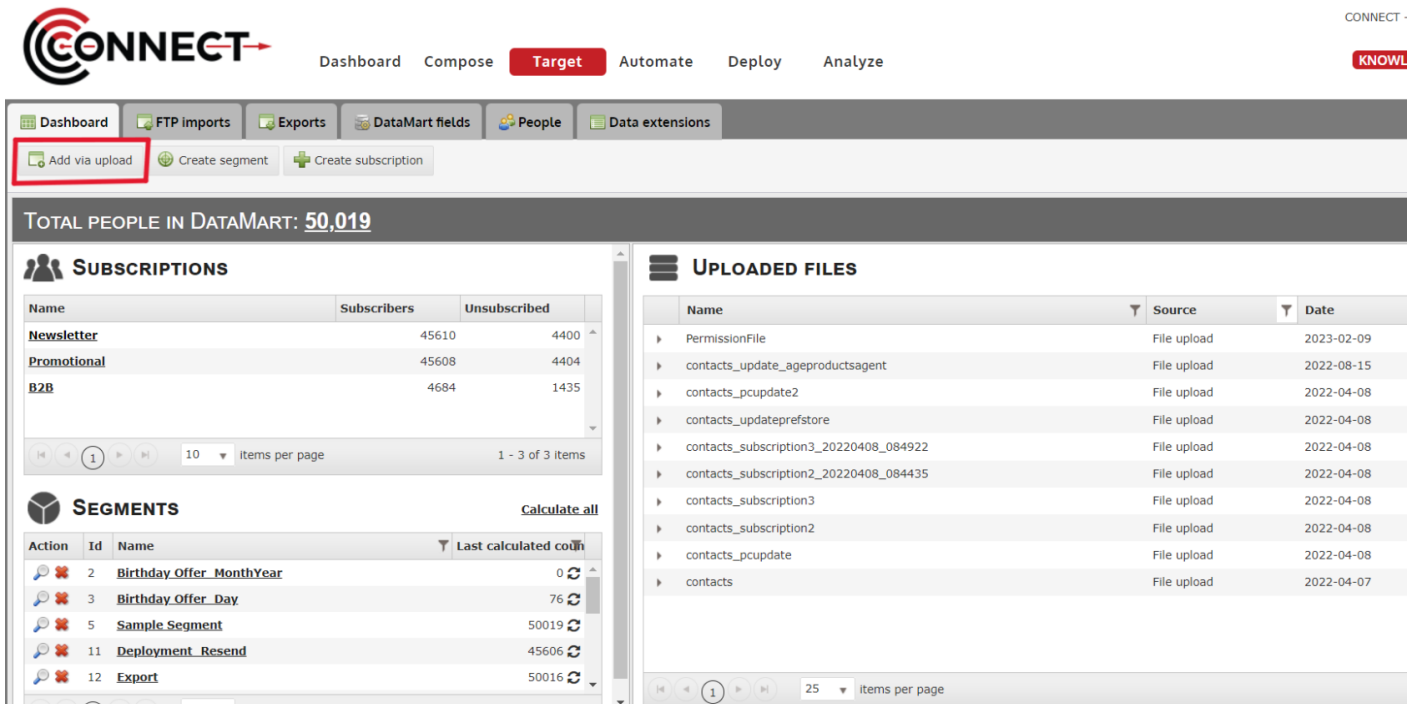
# Importing Contacts

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# Importing A File Manually

For users who do not wish to utilize the segmentation capabilities of DataMart, you are still able to upload a list strictly to be used for deployment. Follow this tutorial to find out how.

## 1. Click on the "Add Via Upload" button from the Target screen



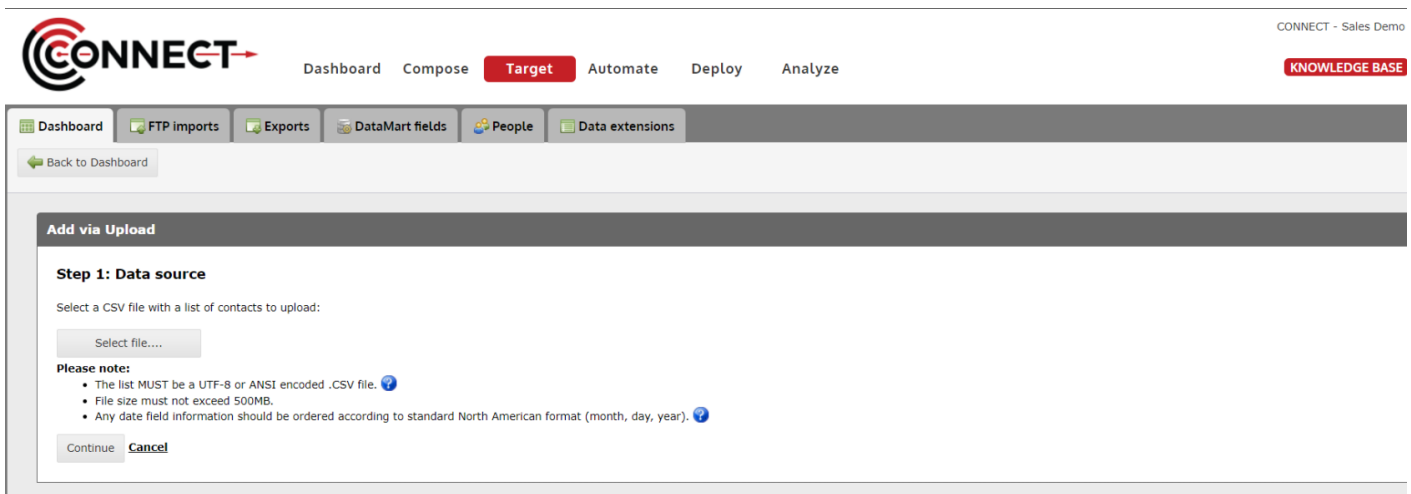
The screenshot shows the CONNECT Target screen. The top navigation bar includes 'Dashboard', 'Compose', 'Target' (highlighted), 'Automate', 'Deploy', and 'Analyze'. Below the navigation bar, there is a 'CONNECT' logo and a 'KNOWLEDGE BASE' button. The main content area has a sidebar with 'Dashboard', 'FTP imports', 'Exports', 'DataMart fields', 'People', and 'Data extensions'. The 'Add via upload' button is highlighted in a red box. The main content area displays 'TOTAL PEOPLE IN DATAMART: 50,019' and two sections: 'SUBSCRIPTIONS' and 'SEGMENTS'. The 'SUBSCRIPTIONS' section shows a table with columns 'Name', 'Subscribers', and 'Unsubscribed'. The 'SEGMENTS' section shows a table with columns 'Action', 'Id', 'Name', and 'Last calculated count'. The 'UPLOADED FILES' section shows a table with columns 'Name', 'Source', and 'Date'.

Name	Subscribers	Unsubscribed
Newsletter	45610	4400
Promotional	45608	4404
B2B	4684	1435

Action	Id	Name	Last calculated count
2	Birthday Offer	MonthYear	0
3	Birthday Offer	Day	76
5	Sample Segment		50019
11	Deployment	Resend	45606
12	Export		50016

Name	Source	Date
PermissionFile	File upload	2023-02-09
contacts_update_ageproductsagent	File upload	2022-08-15
contacts_pcupdate2	File upload	2022-04-08
contacts_updateprefstore	File upload	2022-04-08
contacts_subscription3_20220408_084922	File upload	2022-04-08
contacts_subscription2_20220408_084435	File upload	2022-04-08
contacts_subscription3	File upload	2022-04-08
contacts_subscription2	File upload	2022-04-08
contacts_pcupdate	File upload	2022-04-08
contacts	File upload	2022-04-07

## 2. Click "Select File..." to select the file to upload and click "Continue"



The screenshot shows the CONNECT Target screen with the 'Add via Upload' dialog box open. The dialog box has a 'Step 1: Data source' section with the instruction 'Select a CSV file with a list of contacts to upload:'. Below this is a 'Select file....' button. A 'Please note:' section contains three bullet points: 'The list MUST be a UTF-8 or ANSI encoded .CSV file.', 'File size must not exceed 500MB.', and 'Any date field information should be ordered according to standard North American format (month, day, year)'. At the bottom are 'Continue' and 'Cancel' buttons.

**Step 1: Data source**

Select a CSV file with a list of contacts to upload:

Select file....

**Please note:**

- The list MUST be a UTF-8 or ANSI encoded .CSV file.
- File size must not exceed 500MB.
- Any date field information should be ordered according to standard North American format (month, day, year).

Continue Cancel

### 3. Map all fields to the correct fields in the DataMart if it has not automatically done so

If you have fields in your list that do not map to any field in the DataMart, you may return to the Target screen and go to the "Manage Fields" screen to add one OR you may click the "Do Not Map" box next to the field.

Only use the "Do Not Map" function if you do not plan to use the data in either deployment (ie. Fields with Dynamic Variables need to be mapped)

### 4. Optional - Set Permission Settings

This is an optional setting and should only be set if the records you are uploading have requested to change their permission settings (i.e. Subscribed/Unsubscribed through a form), you are importing subscribers from another system or are looking to bulk update subscription information.

#### Define Permission Settings:

☒ Yes ☐ No ?

Add to subscription(s): -- Please select --

Updating permission information for multiple subscriptions will take longer to perform. Please keep in mind when waiting for list upload to complete.

Permissions to the selected subscription(s): -- Please select -- ?

Permission date changes: ☒ Only update if newer ☐ Change regardless of current date ?

Permission ladder: ☒ Enable ☐ Disable ☐ Overwrite unsubscribes only ?

**Add to subscriptions** - Select the subscription(s) you wish to set permissions for

**Permissions to the selected subscription(s)** - The permission setting you wish to give attempt to give all contacts in the list

This can be set at a record level by including a column in your file with the header ***permission-level*** and providing one of the following values: *double-optin*, *express*, *implied*, *implied-6mo*, *implied-2yr*, *unsubscribed*

### Permission date changes

This setting identifies whether you want to only update the permission level and date if the date/time provided is newer or if you are confident the date you have is the correct one, you can change the level and date regardless.

It is HIGHLY recommended that you provide a date in the file using a column with the header **permission-date** that uses the date format **YYYY-MM-DD HH:MM:SS**. If no date is provided in the file, CONNECT will assume the current date/time and therefore all contact's date will be updated.

## Permission ladder

CONNECT provides an easy way to manage updating subscriber permissions to maintain compliance. The "Permission Ladder" is a failsafe that allows contacts to move up a theoretical "ladder" of permissions but prevent them from coming down. The ladder order is as follows:

1. Unsubscribe
2. Double Opt-in
3. Express
4. Implied
5. Unassigned

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5. Click "Upload records to DataMart" to finish

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6. Click "Continue" on the next screen.

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## View the progress of your upload on the Dashboard

Once you click "Upload" and return to the Target Dashboard, you will be able to view the progress of your list upload.



After your upload is finished, we HIGHLY recommend review the results of your upload to ensure all records were uploaded successfully. To do this, click on the arrow icon next to the filename and the results will expand. Pay particular attention to the "Total rejected records" count. If there are any records that were rejected, you can click, that count and download them to see why they were rejected.





# Automated FTP Imports

# Permission Settings When Importing

When importing data either through a manually upload or FTP, you have the option to "Define Permission Settings" as part of the upload. This will change every contact's subscription permission details based on the selected settings.

## Define Permission Settings:

☒ Yes ☐ No ?

**Add to subscription(s):** -- Please select --

Updating permission information for multiple subscriptions will take longer to perform. Please keep in mind when waiting for list upload to complete.

**Permissions to the selected subscription(s):** -- Please select -- ?

**Permission date changes:** ☒ Only update if newer ☐ Change regardless of current date ?

**Permission ladder:** ☒ Enable ☐ Disable ☐ Overwrite unsubscribes only ?

**Add to subscriptions** - Select the subscription(s) you wish to set permissions for

**Permissions to the selected subscription(s)** - The permission setting you wish to give attempt to give all contacts in the list

This can be set at a record level by including a column in your file with the header ***permission-level*** and providing one of the following values: *double-optin, express, implied, implied-6mo, implied-2yr, unsubscribed*

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## “ Use Case

You are uploading a list of contact captures through a form that have given you implied consent to email to them. In the file are a few subscribers that already exist in your email program. If those subscribers have given you express permission through other means or have unsubscribed from your email program, you would not want their permission "downgraded" to implied even though that permission capture is newer. The ladder prevents the existing subscribers from being updated with the implied permission as they can't "step down the ladder" when it's enabled.