

# Importing data

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# List Upload Error Messages

If you encounter any of the following error messages while trying to upload a list into CONNECT, follow the instructions below.

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1. "The file you have selected has duplicate header names. Please correct this issue and try again."

- This error message indicates that you are trying to upload a file that has more than one header with the same name.
  - To fix this, open your file in Microsoft Excel and change one of the header names so that they no longer match.
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2. "The file you have selected has columns without headers. Please correct this issue and try again."

This error message indicates that you have selected a file that has columns with blank headers. This can happen in two situations (or a combination of both).

1. The file you are trying to upload has columns with data but at least one of the columns is missing a header (see example on left).
2. The file you are trying to upload has "ghost" columns. These are columns that have no values in any of the rows (including the header) but are represented in the file by

commas.

3. Follow the instructions below to fix this issue.

## 2.1. Identifying files with "Ghost" columns

- If you think your file has "ghost" columns, there is an easy way to tell. Simply open your file in Notepad (TextEdit on Mac) and you will generally see an abundance of commas at the end of each row.
  - In a CSV (Comma Delimited Values) file, each comma indicates to Excel or CONNECT that there is another column,
  - Hence when there is an abundance of extra commas on the end of each row, that is indicating to the program that there are extra columns.
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## 2.2. Fixing files with "Ghost" columns

To fix the issue of "ghost" columns, you first want to open your file in Microsoft Excel. In Excel, you will not be able to see the columns.

The best way to get rid of them is to highlight a lot of extra columns to the right of your data.

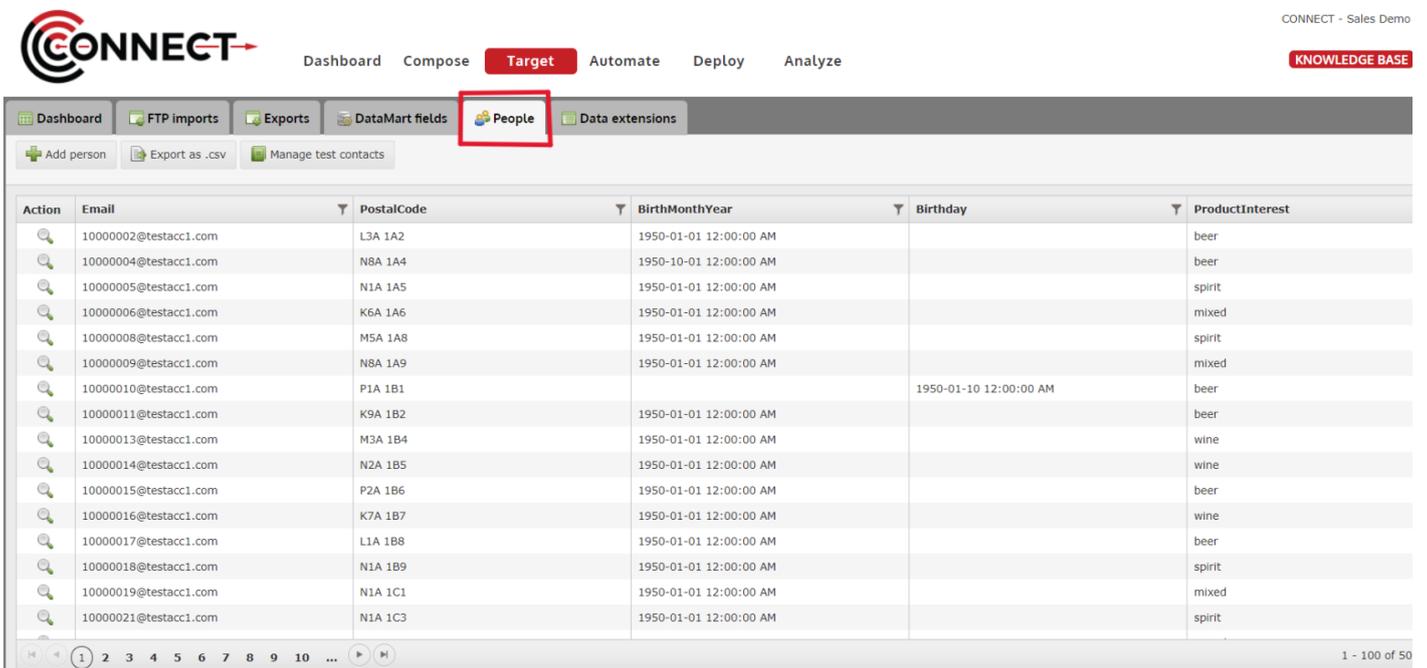
1. Highlight the columns by clicking one of the letter headers at the top, holding down your click and dragging across until you've highlighted enough columns. The more you highlight, the more likely you are to catch all of the ghost columns.
2. Right click on any of column letters at the top and select "Delete". Save your file and exit Excel.

3. To confirm you have successfully deleted the "ghost" columns, re-open your file in notepad and the extra commas should be gone.

# How to Add an Additional Person

There are situations where you might need to add one more person to your DataMart, either a customer or maybe you have a new team member you would like to add as a stakeholder. Here's how.

## 1. To begin, click on the People tab located in the Target screen



CONNECT - Sales Demo

Dashboard Compose **Target** Automate Deploy Analyze **KNOWLEDGE BASE**

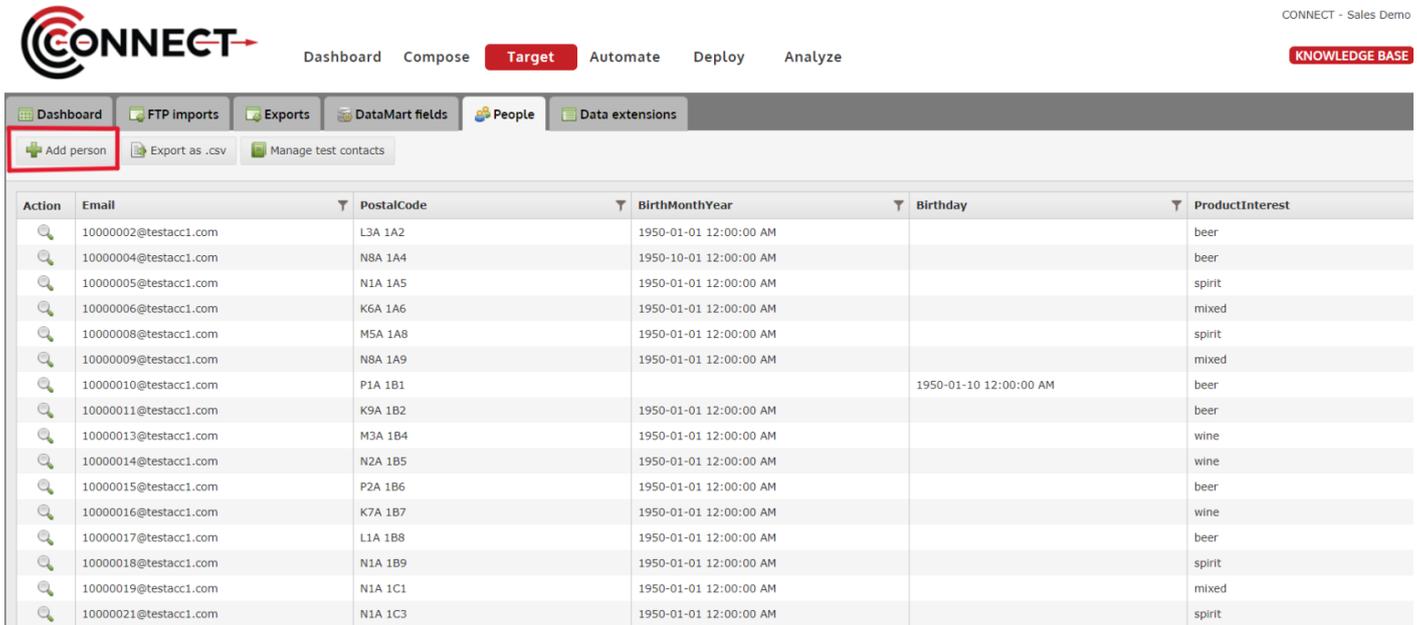
Dashboard FTP imports Exports DataMart fields **People** Data extensions

+ Add person Export as .csv Manage test contacts

Action	Email	PostalCode	BirthMonthYear	Birthday	ProductInterest
	10000002@testacc1.com	L3A 1A2	1950-01-01 12:00:00 AM		beer
	10000004@testacc1.com	N8A 1A4	1950-10-01 12:00:00 AM		beer
	10000005@testacc1.com	N1A 1A5	1950-01-01 12:00:00 AM		spirit
	10000006@testacc1.com	K6A 1A6	1950-01-01 12:00:00 AM		mixed
	10000008@testacc1.com	M5A 1A8	1950-01-01 12:00:00 AM		spirit
	10000009@testacc1.com	N8A 1A9	1950-01-01 12:00:00 AM		mixed
	10000010@testacc1.com	P1A 1B1		1950-01-10 12:00:00 AM	beer
	10000011@testacc1.com	K9A 1B2	1950-01-01 12:00:00 AM		beer
	10000013@testacc1.com	M3A 1B4	1950-01-01 12:00:00 AM		wine
	10000014@testacc1.com	N2A 1B5	1950-01-01 12:00:00 AM		wine
	10000015@testacc1.com	P2A 1B6	1950-01-01 12:00:00 AM		beer
	10000016@testacc1.com	K7A 1B7	1950-01-01 12:00:00 AM		wine
	10000017@testacc1.com	L1A 1B8	1950-01-01 12:00:00 AM		beer
	10000018@testacc1.com	N1A 1B9	1950-01-01 12:00:00 AM		spirit
	10000019@testacc1.com	N1A 1C1	1950-01-01 12:00:00 AM		mixed
	10000021@testacc1.com	N1A 1C3	1950-01-01 12:00:00 AM		spirit

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## 2. Next, click on the "Add Person" button



CONNECT - Sales Demo

Dashboard Compose **Target** Automate Deploy Analyze

KNOWLEDGE BASE

Dashboard FTP imports Exports DataMart fields **People** Data extensions

**Add person** Export as .csv Manage test contacts

Action	Email	PostalCode	BirthMonthYear	Birthday	ProductInterest
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	10000005@testacc1.com	N1A 1A5	1950-01-01 12:00:00 AM		spirit
	10000006@testacc1.com	K6A 1A6	1950-01-01 12:00:00 AM		mixed
	10000008@testacc1.com	M5A 1A8	1950-01-01 12:00:00 AM		spirit
	10000009@testacc1.com	N8A 1A9	1950-01-01 12:00:00 AM		mixed
	10000010@testacc1.com	P1A 1B1		1950-01-10 12:00:00 AM	beer
	10000011@testacc1.com	K9A 1B2	1950-01-01 12:00:00 AM		beer
	10000013@testacc1.com	M3A 1B4	1950-01-01 12:00:00 AM		wine
	10000014@testacc1.com	N2A 1B5	1950-01-01 12:00:00 AM		wine
	10000015@testacc1.com	P2A 1B6	1950-01-01 12:00:00 AM		beer
	10000016@testacc1.com	K7A 1B7	1950-01-01 12:00:00 AM		wine
	10000017@testacc1.com	L1A 1B8	1950-01-01 12:00:00 AM		beer
	10000018@testacc1.com	N1A 1B9	1950-01-01 12:00:00 AM		spirit
	10000019@testacc1.com	N1A 1C1	1950-01-01 12:00:00 AM		mixed
	10000021@testacc1.com	N1A 1C3	1950-01-01 12:00:00 AM		spirit

## 3. Select the Subscription(s) you would like to add the record to

 = required

Add to subscription(s):

Please select

## 4. Select the permission level of the record you are adding

Permissions to the selected subscription(s):  

Permission Capture Date:   

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## 5. OPTIONAL: Select the record type of the record you are adding

For a definition on Record Types, [click here](#).

- Record type:**
- Test account:** Records that are used for testing purposes
  - Stakeholder:** People who are involved in the development and/or approval process prior to final deployments
  - Seed:** People who are included in deployments without having their activity tracked (opens, clicks, etc.)
- 

## 6. Fill out the Field Information of the Record you are Adding

<b>Email:</b>	<input type="text"/>	
<b>FirstName:</b>	<input type="text"/>	
<b>LastName:</b>	<input type="text"/>	
<b>Address:</b>	<input type="text"/>	
<b>City:</b>	<input type="text"/>	
<b>Province:</b>	<input type="text"/>	
<b>PostalCode:</b>	<input type="text"/>	
<b>BirthMonthYear:</b>	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
<b>Birthday:</b>	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
<b>Language:</b>	<input type="text"/>	
<b>PreferredStore:</b>	<input type="text"/>	▲▼
<b>ProductInterest:</b>	<input type="text"/>	
<b>IsPremium:</b>	<input type="text"/>	
<b>LoyaltyNumber:</b>	<input type="text"/>	
<b>Age:</b>	<input type="text"/>	▲▼
<b>HasProductA:</b>	<input type="text"/>	
<b>HasProductB:</b>	<input type="text"/>	
<b>MortgageRenewalDate:</b>	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
<b>AssignedAgentId:</b>	<input type="text"/>	

Note: Only the Identifier field is mandatory in this process. It will be flagged with a green indicator.

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7. Click the "Save" button, once finished

\* = required

Add to subscription(s): Permissions to the selected subscription(s): Permission Capture Date: 

- Record type:
- Test account:** Records that are used for testing purposes
  - Stakeholder:** People who are involved in the development and/or approval process prior to final deployments
  - Seed:** People who are included in deployments without having their activity tracked (opens, clicks, etc.)

Email:

FirstName:

LastName:

Address:

City:

Province:

PostalCode:

BirthMonthYear:  (YYYY-MM-DD HH:MM:SS AM/PM)

Birthday:  (YYYY-MM-DD HH:MM:SS AM/PM)

Language:

PreferredStore:

ProductInterest:

IsPremium:

LoyaltyNumber:

# How to Upload Records as Stakeholders, Test Accounts and Seeds

Throughout CONNECT, you will see references to three different records types: Stakeholders, Test Accounts and Seeds.

In this article, the process for uploading these records and the recommended uses for each are discussed.

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1. Begin uploading the list of records you would like to assign as one of the record types

- If you need instructions on how to upload a list file, [\*\*click here.\*\*](#)
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2. During the list upload process, click on "Additional options" to

# reveal the record type options

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▼ Additional options

- Record types:**
- Test accounts:** Records that are used for testing purposes
  - Stakeholders:** People who are involved in the development and/or approval process prior to final deployments
  - Seed list:** People who are included in deployments without having their activity tracked (opens, clicks, etc.)

Upload records to DataMart [Cancel](#)

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## 3. Test Accounts

- Test Accounts are defined in CONNECT as email addresses used solely for testing purposes.
- They might be Gmail or Hotmail accounts that would be used to see how a campaign is rendering in different email clients.
- They can also be individuals who want to be included in all testing deployments such as the Campaign Manager.

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## 4. Stakeholders

- Stakeholders are defined in CONNECT as individuals who follow a campaign from start to finish and wish to be included in the process.
  - You can add stakeholders to any testing that is being performed on a campaign and you can include them in the final deployment
  - For a company, Stakeholders might be department leaders or managers. For an agency, Stakeholders might be account managers or key client contacts.
  - You may include Stakeholders at any time, so it is important to only choose to add them to a deployment/test when you are ready for them to see the campaign
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# 5. Seed Lists

- Seed lists are similar to stakeholders, however this separation is provided as Seed lists can only be used in final deployment and are added in with the regular customers.
- Seed lists tend to include executives and other individuals who wish to see final deployment as the customer sees it.
- **Note:** Records flagged as a Seed List will not be included in the final metrics.

# How to set up a FTP Import

FTP Imports provide a simple solution to automating your data imports. This can be effective for pushing data from your CRM system or another tool that collects contacts into CONNECT. Follow the tutorial below to set-up your first FTP Import.

**Note:** In order to access the FTP Import's sub folder and begin dropping files, you will need your CONNECT FTP credentials which were provided when you were on boarded. If you need help retrieving these credentials, please submit a support ticket or [email support](#).

## Tutorial

**Please note:** To better view the tutorial, click the full screen icon .

<https://www.iorad.com/player/131423/How-to-set-up-an-FTP-import?src=iframe>

# How to edit a FTP Import task

Using segments is not only a great way to target specific groups of contacts but it's also a great way to retrieve data from CONNECT for use outside of the application. This tutorial will help walk you through how to export a segment using our Exports feature.

## Tutorial

**Please note:** To try out the feature, click the full screen icon  in the tutorial.

<https://www.iorad.com/player/145076/How-to-edit-a-FTP-Import?src=iframeoembed=1>