



IMPORT UPDATE EXISTING

Choose Import Update Type:

Contact Source

- Import Update Recurring Import Update

Select the Contact Source you wish to update:

Carolina Group - Main Database

Select

- Add New Contacts
- Update Field Values In The Contact Source
- Add New Contacts And Update Existing Field Values In The Contact Source
- Opt Out Contacts

Step 3: Contact Lists:

Answer this question...

1. Are you updating an already existing Silverpop contact list? If not, follow instructions #2.
 - a. Click the button [Select Contact List] > Select the contact list you want to update.
 - b. Click **SELECT**. Move on to the next step.
2. Are you creating a NEW Silverpop contact list? Follow these instructions.
 - a. Click the button [Create New Contact List] > Select the contact list you want to update.
 - b. Name new Contact List [ex: WT Miami - Concierge - 12.9.15]
 - i. All contact list names **must** start with the publication's name - have an accurate description - and it's recommended that the date of upload is added to the end.
 - c. Click the button [Browse] > Select the folder you want to store your contact list in > Click **SELECT**
 - d. Proceed to Step 4

Step 4: Select File: Upload file from local hard drive

File **must to be a CSV file

File **must have field names [ex: First Name, Address, Email, Company Name, etc.]

> Click **NEXT**

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Steps: Select File Define Data Format Map Fields Edit Field Settings

https://engage5.silverpop.com/composeSelectList.do

Charlotte Databases

Shared Private

Step 5: IMPORT UPDATE EXISTING page

1. Check the box: "First row contains fields names" box
2. Click **NEXT**

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IMPORT UPDATE EXISTING Steps: 1 Select File 2 Define Data Format 3 Map Fields 4 Edit Field Settings

File name: A-Christmas-Carol-2015.csv

First row contains field names

SUBMISSION_ID	DATE_CREATED	FORM_TITLE	first_name	...
45439	11/11/15 13:23	A Christmas Carol 2015	Topaz	...
45440	11/11/15 19:06	A Christmas Carol 2015	Leigh	...
45441	11/11/15 19:20	A Christmas Carol 2015	tammy	...

Date Field Formatting (optional)
Engage displays all dates in mm/dd/yyyy. In order to preserve your native date format, tell us how dates are formatted in your file. In the next step, make sure to map your date fields to a date field type.

This formatting selection also applies to custom fields mapped to Timestamp field types and system fields mapped to "Opt In Date" and "Opt Out Date".

Month First Day First Year First

Next Cancel

Step 6: IMPORT UPDATE EXISTING page 2

1. Check the **boxes** (on the left) to **ignore** fields that don't need to be uploaded.
2. Use the dropdown menu to choose each category from the "Fields" menu that matches closest to your "Fields from File".**
3. Click **NEXT**

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IMPORT UPDATE EXISTING Steps: 1 Select File 2 Define Data Format 3 Map Fields 4 Edit Field Settings

Imported Contact Source: Lodi Silverpop database_12.3.15.csv

Field Name:

Field Type: Text Add Field

#	<input type="checkbox"/> Ignore	Fields From File	Field Type	Fields
1	<input type="checkbox"/>	Company Name	Text	Company Name
2	<input type="checkbox"/>	First name	Text	First Name
3	<input type="checkbox"/>	Last name	Text	Last Name
4	<input type="checkbox"/>	Address 1	Text	Address 1
5	<input type="checkbox"/>	City	Text	City
6	<input type="checkbox"/>	State	Text	Select a Field
7	<input type="checkbox"/>	Zip or Postal	Text	Email
8	<input type="checkbox"/>	Telephone Number	Text	CREATED_FROM
9	<input type="checkbox"/>	email	System	Email Type

Note: Mapped fields marked with asterisk apply the value to new recipients only.

Next Ca

Step 7: IMPORT UPDATE EXISTING page 3

Ignore this page, select **NEXT** on the bottom right corner.

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IMPORT UPDATE EXISTING

Steps: 1 Select File 2 Define Data Format 3 Map Fields 4 Edit Field Settings

UID	Field Name	Field Type	Required	Default Value
	Email	System	Yes	
	Email Type	System	Yes	
	CREATED_FROM	System	Yes	
	CRM Lead Source	System	No	
	Opt In Details	System	Yes	
	Opt In Date	System	Yes	
	Last Modified Date	System	Yes	
	Opt Out Details	System	Yes	
	Opted Out Date	System	Yes	
	Address Line 1	Text	No	
	Address Line 2	Text	No	
	Birth Month	Text	No	
	Birth Year	Numeric	No	
	Birthdate	Text	No	
	Birthday	Numeric	No	
	Carolina Parent Directories	Text	No	
	Carolina Parent Events	Text	No	
	Carolina Parent Newsletters	Text	No	
	charlotteparent	Yes/No	No	
	City	Text	No	
	Company Name	Text	No	
	Country	Text	No	
	CP_FYI	Text	No	
	Digital Magazine Subscriptions	Text	No	
	Email Lists	Text	No	
	First Name	Text	No	
	Gender	Selection (choose one)	No	
	HardBounce	Numeric	No	
	Home Phone Number	Text	No	

Step 8: AN IMPORT DATA JOB **Final Page*

1. Check the box “Upon completion of the data job, send an email notification to the address below:”
2. Select **Submit**

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AN IMPORT DATA JOB

You are about to submit an import data job that will run in the background. Review the job details below and choose whether or not you want to receive email notification once the job is complete. Click **Submit** to submit the data job.

Name: Charlotte Group - Main Database
Saved in: Shared
Data file name: A-Christmas-Carol-2015.csv
File format: CSV
Column headers: true
Fields from file: 22
Fields ignored: 15
Fields to import: 7
Unique Identifier: EMAIL
Contact Lists: CMAG - Revue

Email Notification

Upon completion of the data job, send an email notification to the address below:
Email address: topaz.curtis@charlottemagazine.com

Submit **Cancel**