modern campus®

Engaging Modern Learners
For Life

Introduce yourself in the chat! Which institution are you here with?

Data Management

Learn how to manually upload your data, handle basic upload errors, and explore some options for data cleanup!

This webinar is MOST suited to those who do manual data uploads or updates!

Data Management

Learn how to manually upload your data, handle basic upload errors, and explore some options for data cleanup!

Agenda

1. Intro
2. Data File Do's and Don'ts
3. Data File Upload
4. Upload Errors
5. Data Clean Up
6. Q&A
7. Close

Data File Background Info

What is a data file?

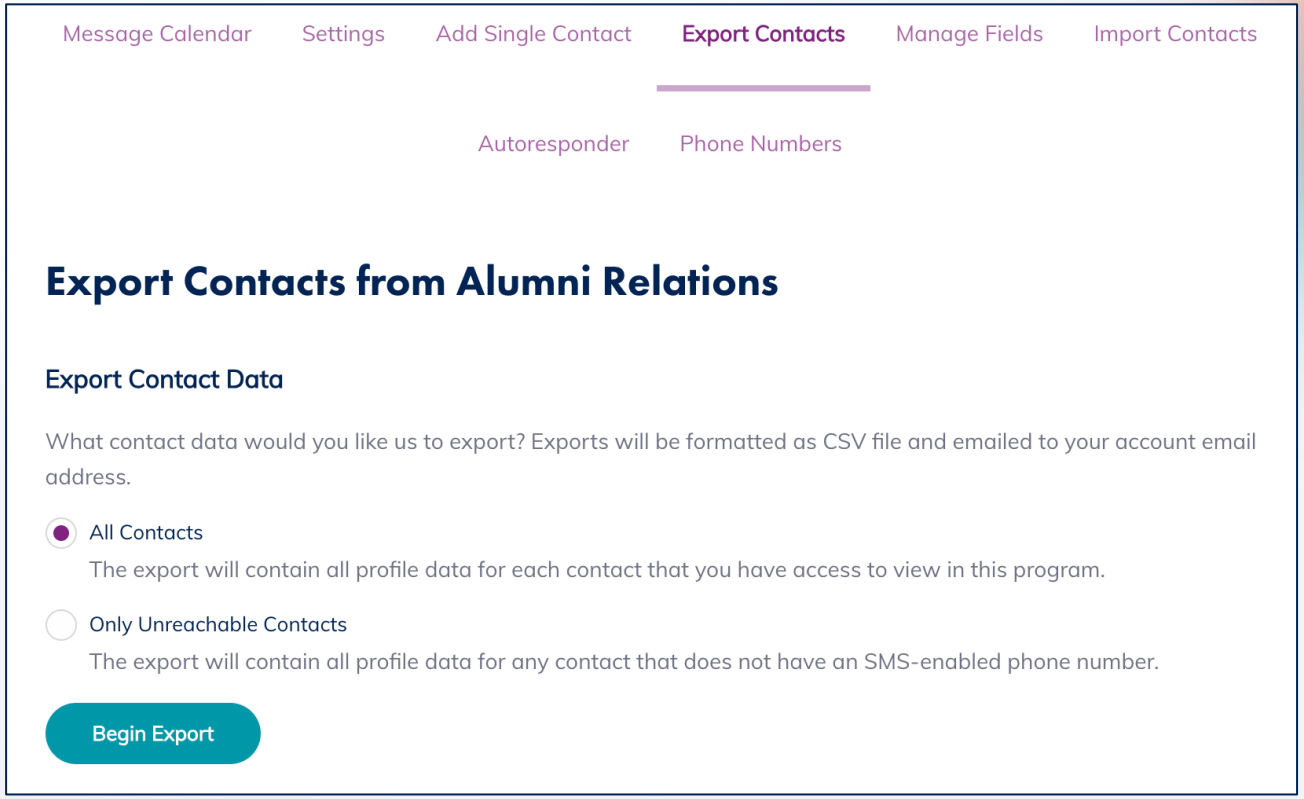
- Used to update contacts or add new contacts
- Always a .csv file
- Contains contact information used in Message
- Can be manually updated by program and account admin

	A	B	C	D	E	
	customer_id	major	donation_amo	staff_name	prior_donor	sig
	10000	Communicatio	$500.00	Joe	FALSE	225
	10001	Anthroplogy	$25.00	Joe	YES	225
	10002	International R	$80.00	Joe	NO	225
	10003	History		Joe	TRUE	225
	10004	International R	90	Kris		225
	10005	Anthroplogy	N/A	Joe		225
	10006	Communicatio	N/A	Joe	TRUE	225
	10007	International R	N/A	Kris	TRUE	225
	10008	History	100	Laney		225
	10009	Business	N/A	Joe	FALSE	225

Where is my data file?

- Do you have a master file?
  - Communicate with other users in your institution
  - Who is supposed to update / add?
- Export your data to create an data file
  - → Program tab
  - → Export contacts

  *there are fields in the export file that will fail your import, delete them!



Avoid an Error!

- Delete the extra columns
- Edit your data
- Reupload the file!

When you export your data, message will add a few extra columns at the end. Get rid of them!

	sys_send_1	sys_carrier	sys_phone_type
000000	FALSE	UNKNOWN	UNKNOWN
000000	FALSE	UNKNOWN	UNKNOWN
000000	TRUE	UNKNOWN	UNKNOWN
000000	TRUE	UNKNOWN	UNKNOWN

In Platform

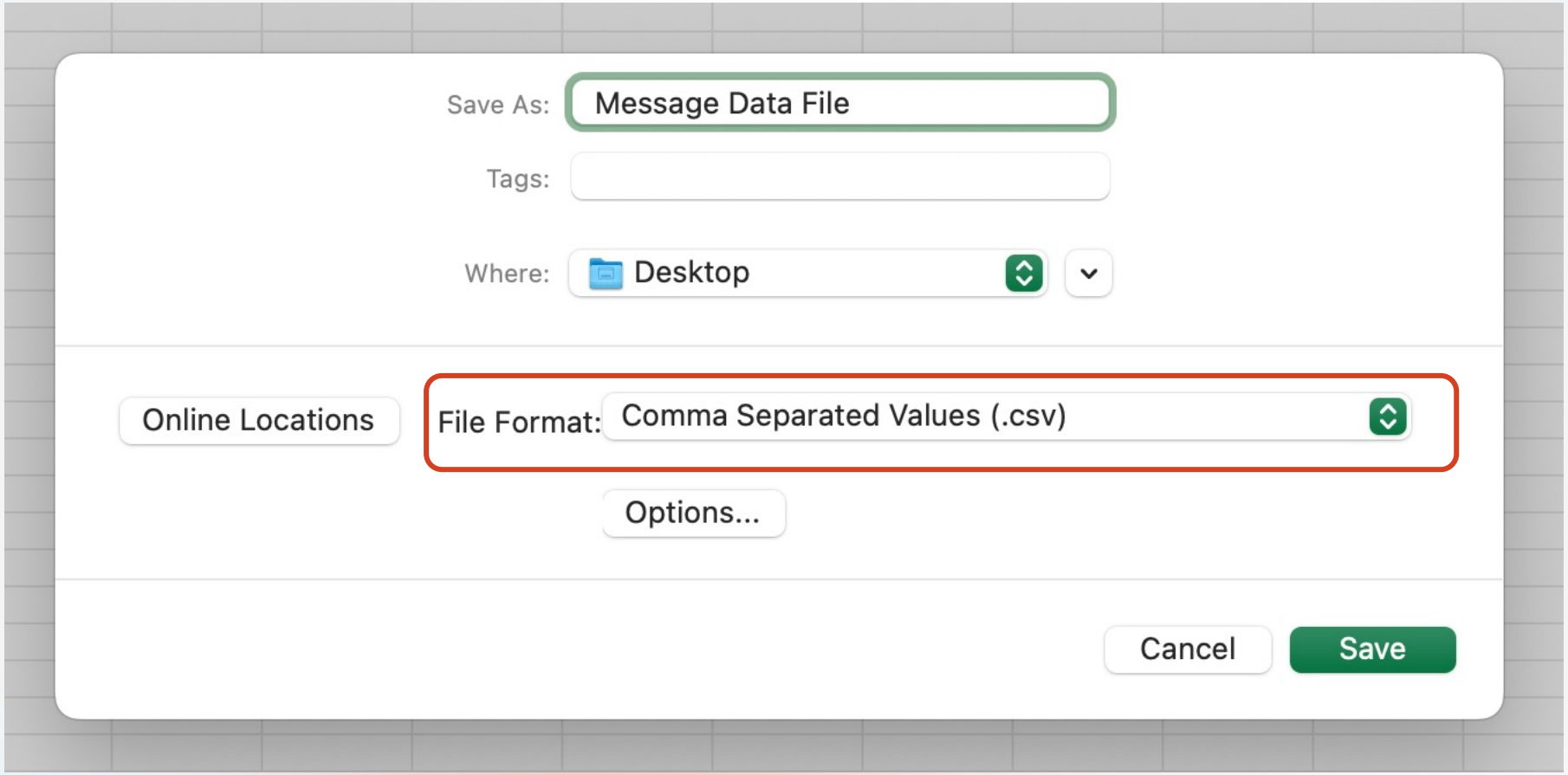
- Export Contacts
- Retrieve File
- Delete extra columns

Create Your Data File

Data File Rules

1. .CSV file
2. Column headers must be **all lower case, no spaces**
3. Column headers must **match your field name 100%**
   - Check this under → **Program Tab;** → **Custom Fields**
   - Note: Custom fields cannot be edited once they're created
4. Type of data must **match the field type** exactly
   - There's a cheat sheet at the bottom of → **Program Tab;** → **Custom Fields**
5. You always need **customer_id** or **signalvine_id** when updating

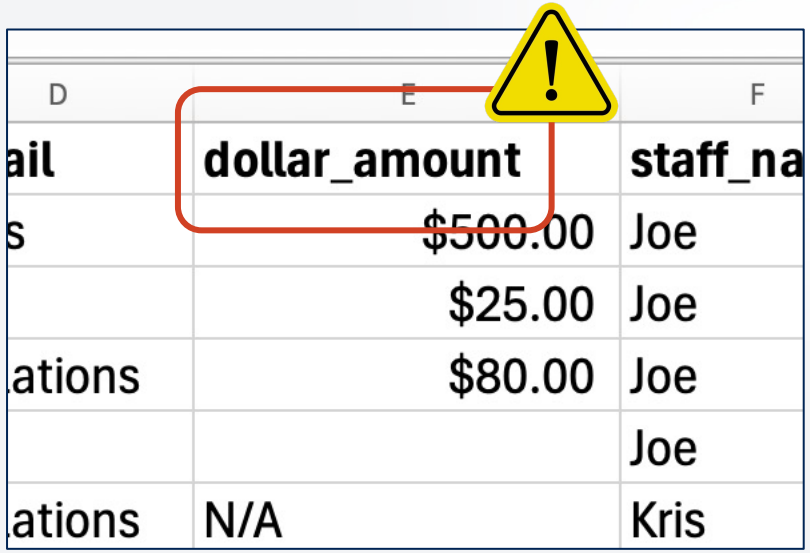
.CSV file


Save As:
Message Data File
Tags:
Where:
Desktop
Online Locations
File Format:
Comma Separated Values (.csv)
Options...
Cancel
Save

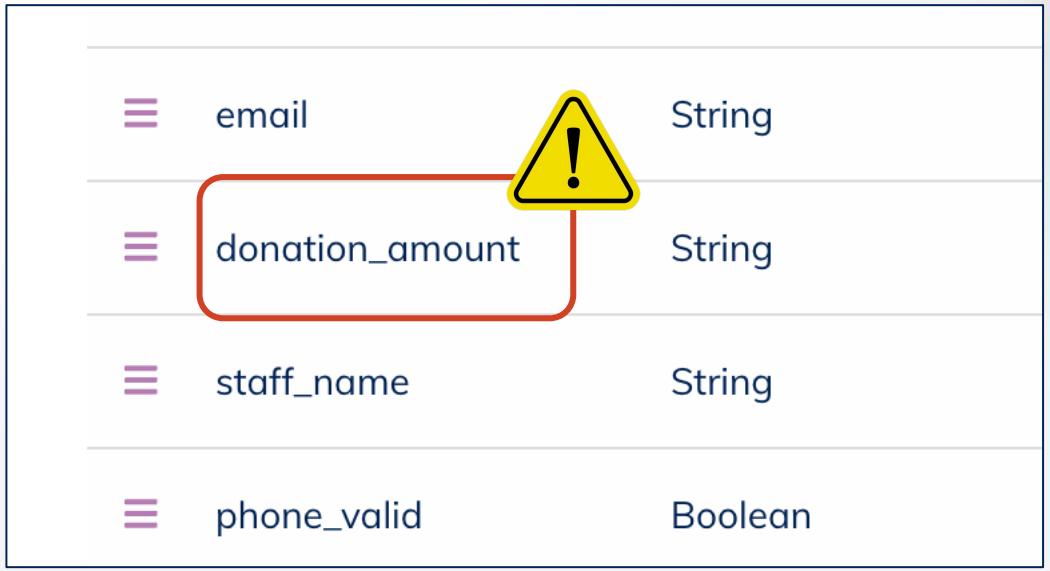
Column headers must be **all lower case, no spaces**

	B	C	D	E
	customer_id	major	Email	donation_am
4 r	10000	Communications		$50
4 r	10001	Anthroplogy		$2

Column headers must **match your field name 100%**



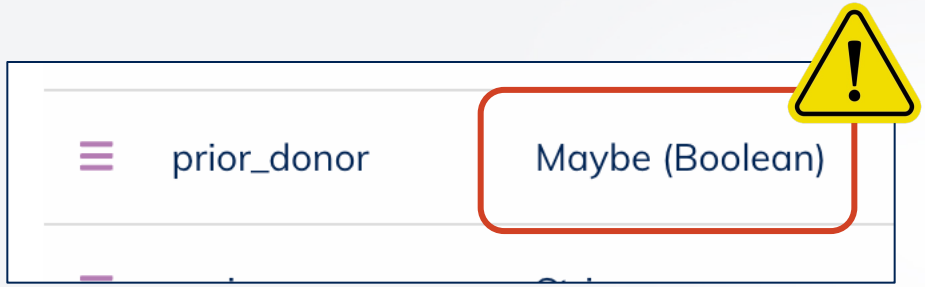
D	E	F
ail	dollar_amount	staff_na
s	$500.00	Joe
	$25.00	Joe
ations	$80.00	Joe
		Joe
ations	N/A	Kris

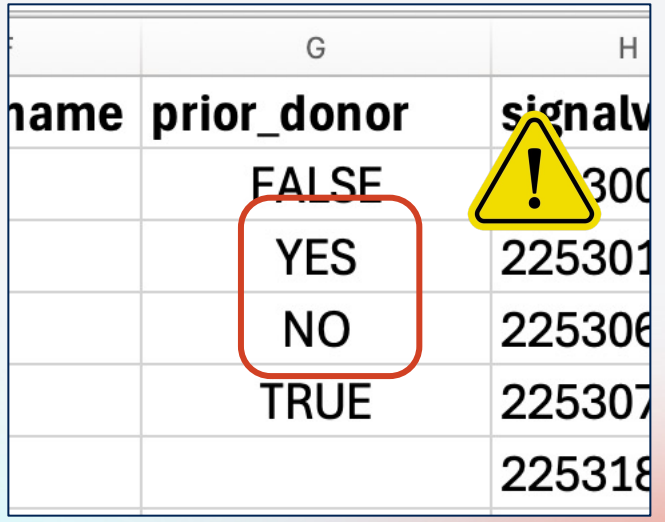


Check this under → **Program Tab;** → **Custom Fields**

Note: Custom fields cannot be edited once they're created

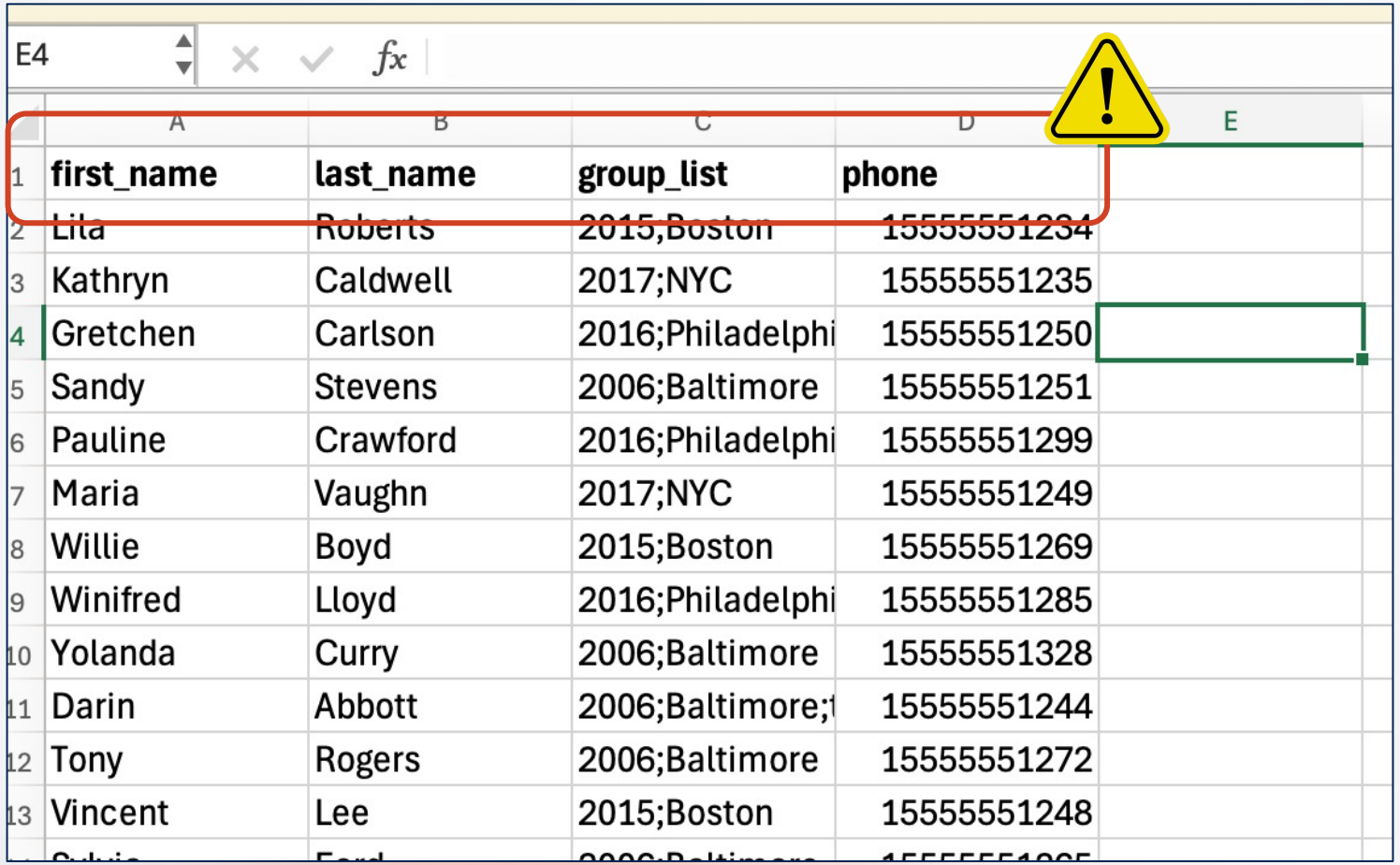
Type of data must **match the field type** exactly





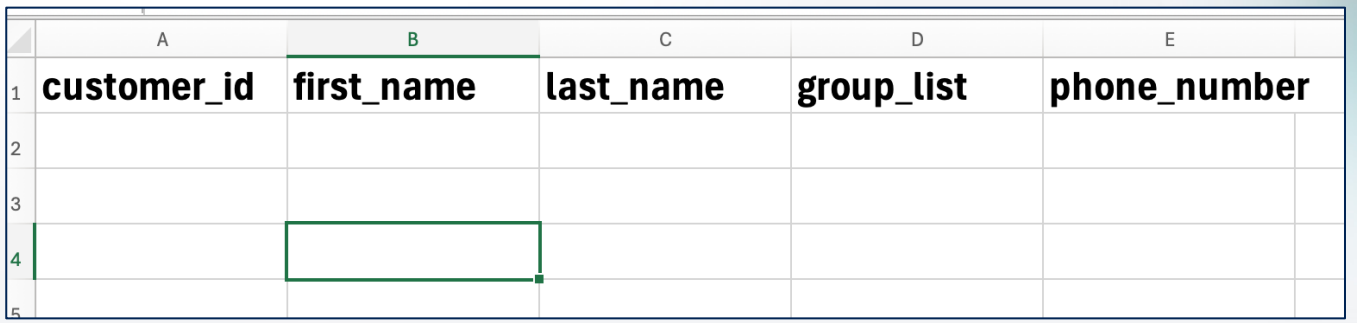
There's a cheat sheet at the bottom of
→ **Program Tab;** → **Custom Fields**

You always need **customer_id** or **signalvine_id** when updating



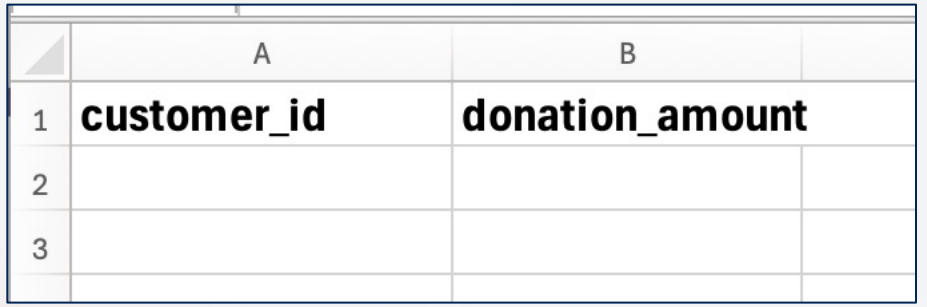
Create Your File

- Import New Contacts: Required Fields
  - customer_id – HIGHLY RECOMMENDED
  - first_name
  - last_name
  - group_list
  - phone_number



	A	B	C	D	E
1	customer_id	first_name	last_name	group_list	phone_number
2					
3					
4					
5					

- Update existing contacts
  - customer_id or signalvine_id
  - The field you want to update!



	A	B
1	customer_id	donation_amount
2		
3		

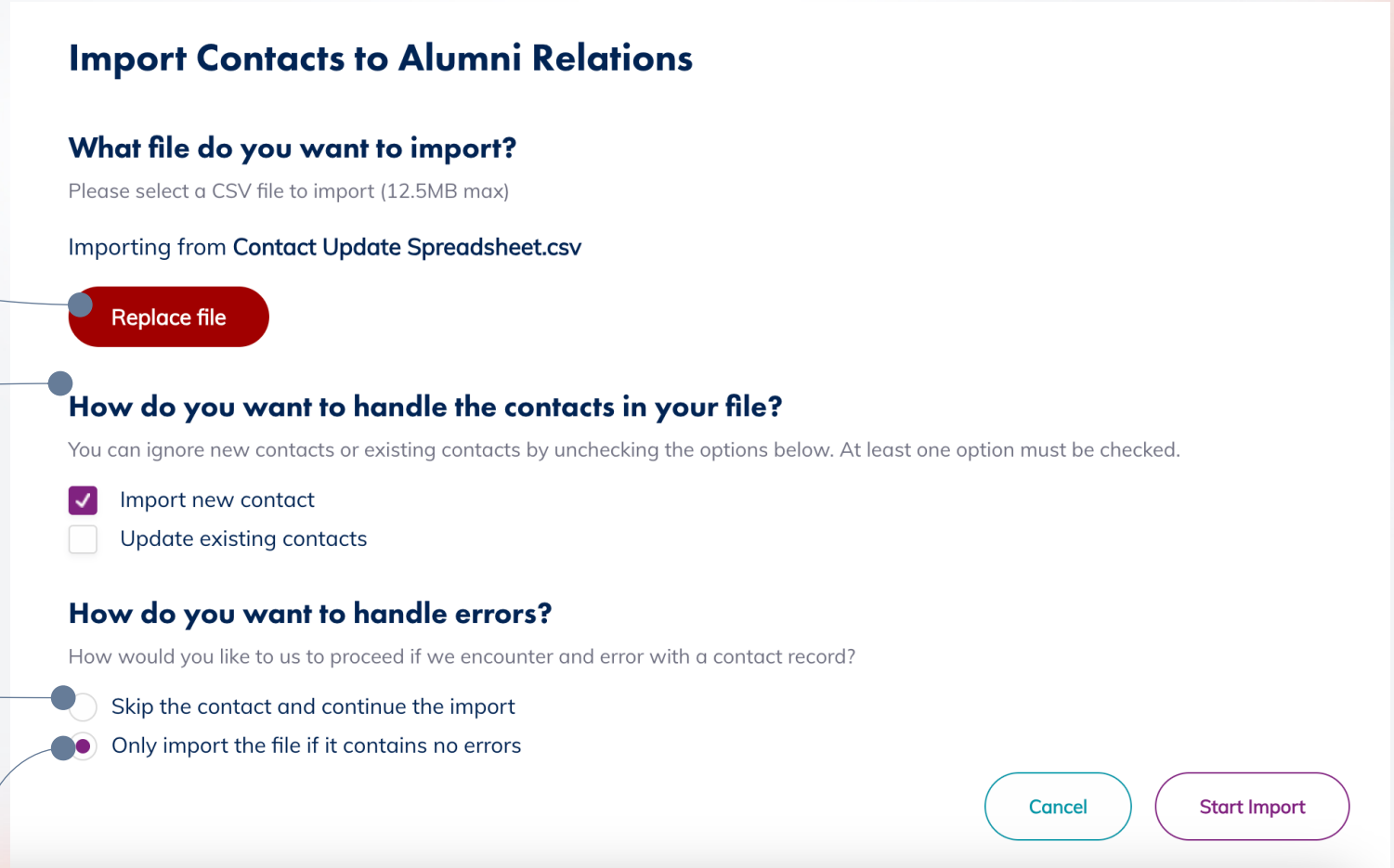
Import Contacts Page

Select your data file

Options 1: Import new contacts
Option 2: Update existing contacts

Will NOT update unless there are zero errors.

Recommended: Will update all fields possible and provide a report on contacts / fields with errors.



Demo data file upload in app

Data File Pop Quiz

1. Which format must your data file be in? (Single choice)

- ○ .XLS
- ○ .CSV
- ○ .DOCX

2. What is the problem with this data file? (Single choice)

	A	B	C
1	**first_name**	**last_name**	**Group_List**
2	Lila	Roberts	ARCHIVE
3	Kathryn	Caldwell	ARCHIVE

- ○ Column headers must be all lower case
- ○ Column headers cannot have underscores ___

3. What is the problem with this data file? (Single choice)

	F	
	prior_donor	**major**
	YES	Comm
	YES	Anthr
	FALSE	Intern
	FALSE	Histo

prior_donor Maybe (Boolean)

- ○ Data doesn't match the filed type (Boolean must be TRUE/FALSE)

4. I tried to update my contact's group_list. Why did my data file have

	A	B	C
1	**first_name**	**last_name**	**group_list**
2	Lila	Roberts	ARCHIVE
3	Kathryn	Caldwell	ARCHIVE
4	Gretchen	Carlson	ARCHIVE

- ○ The column headers are all lowercase
- ○ group_list must have a number
- ○ A data file update must ALWAYS have either customer_id or signalvine_id

Basic Import Errors

How to View Errors

START TIME	STATUS	RESULTS	ERROR FILE	IMPORTED BY
8/6/24 16:49	Success	0 added, 5 ignored, 110 up	None	kseale@moderncampu...
8/6/24 16:48	Fail	View 2 errors		kseale@moderncampu...
8/6/24 14:15	Success	0 added, 3 ignored, 112 up	None	kseale@moderncampu...
8/6/24 14:10	Success	0 added, 25 ignored, 99 up	None	kseale@moderncampu...

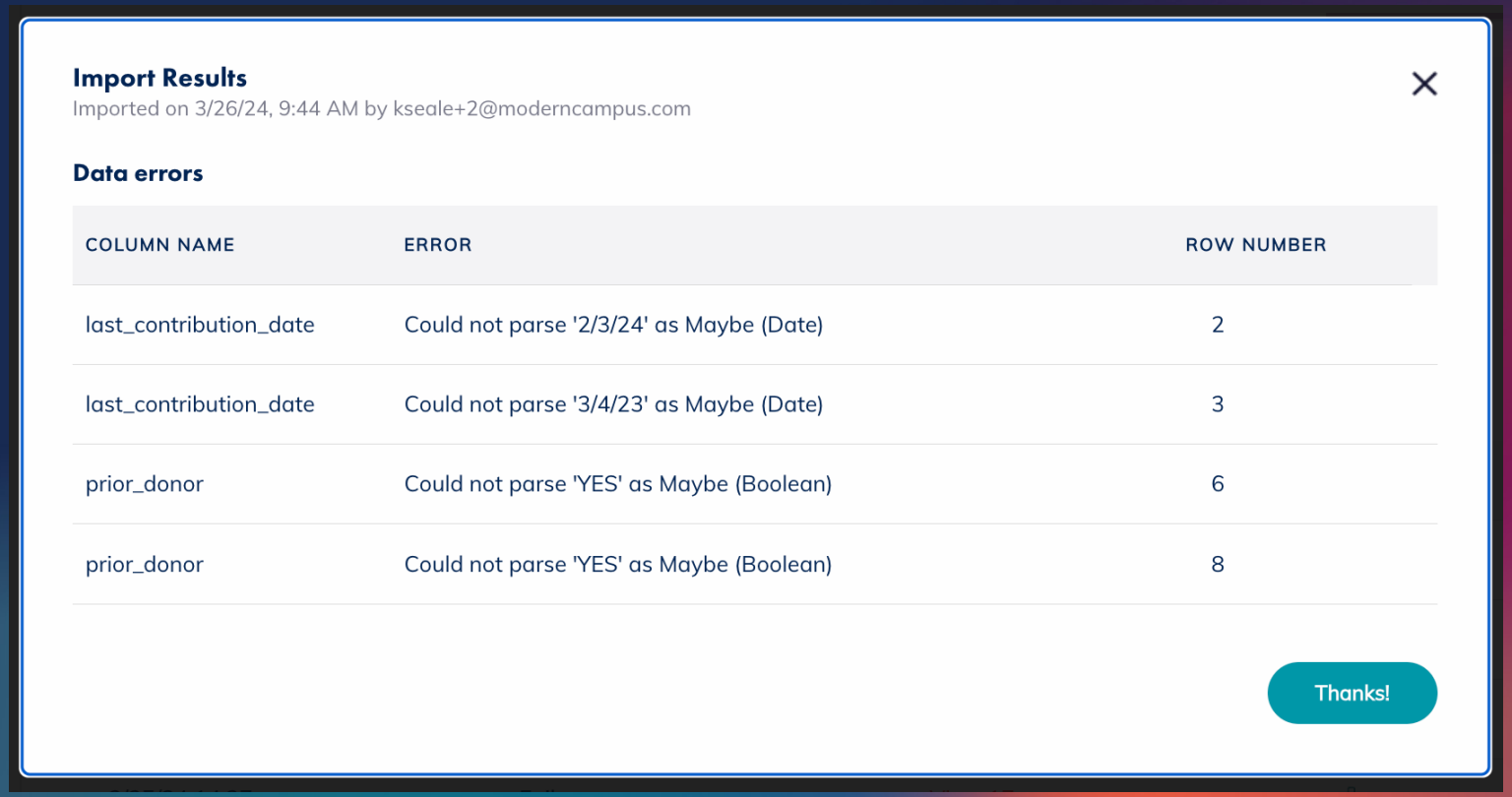
How do you want to handle errors?

How would you like to us to proceed if we encounter and error with a contact record?

- (●) Skip the contact and continue the import
- ( ) Only import the file if it contains no errors

Could not parse "____" as ____:

Data File Upload Error



Import Results

Imported on 3/26/24, 9:44 AM by kseale+2@moderncampus.com

Data errors

COLUMN NAME	ERROR	ROW NUMBER
last_contribution_date	Could not parse '2/3/24' as Maybe (Date)	2
last_contribution_date	Could not parse '3/4/23' as Maybe (Date)	3
prior_donor	Could not parse 'YES' as Maybe (Boolean)	6
prior_donor	Could not parse 'YES' as Maybe (Boolean)	8

Thanks!

Import Results

Imported on 3/26/24, 9:44 AM by kseale+2@moderncampus.com

Data errors

COLUMN NAME	ERROR	ROW NUMBER
last_contribution_date	Could not parse '2/3/24' as Maybe (Date)	2
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Thanks!

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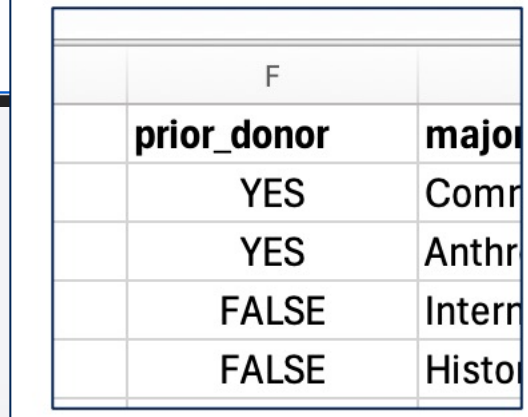
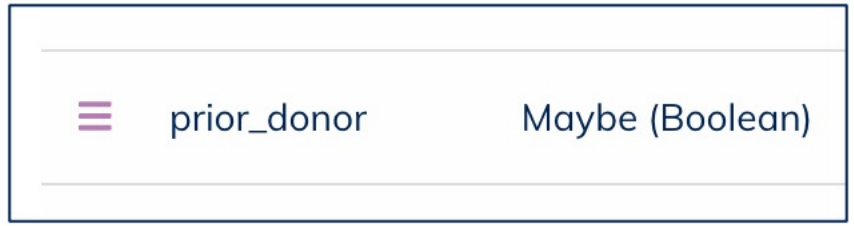
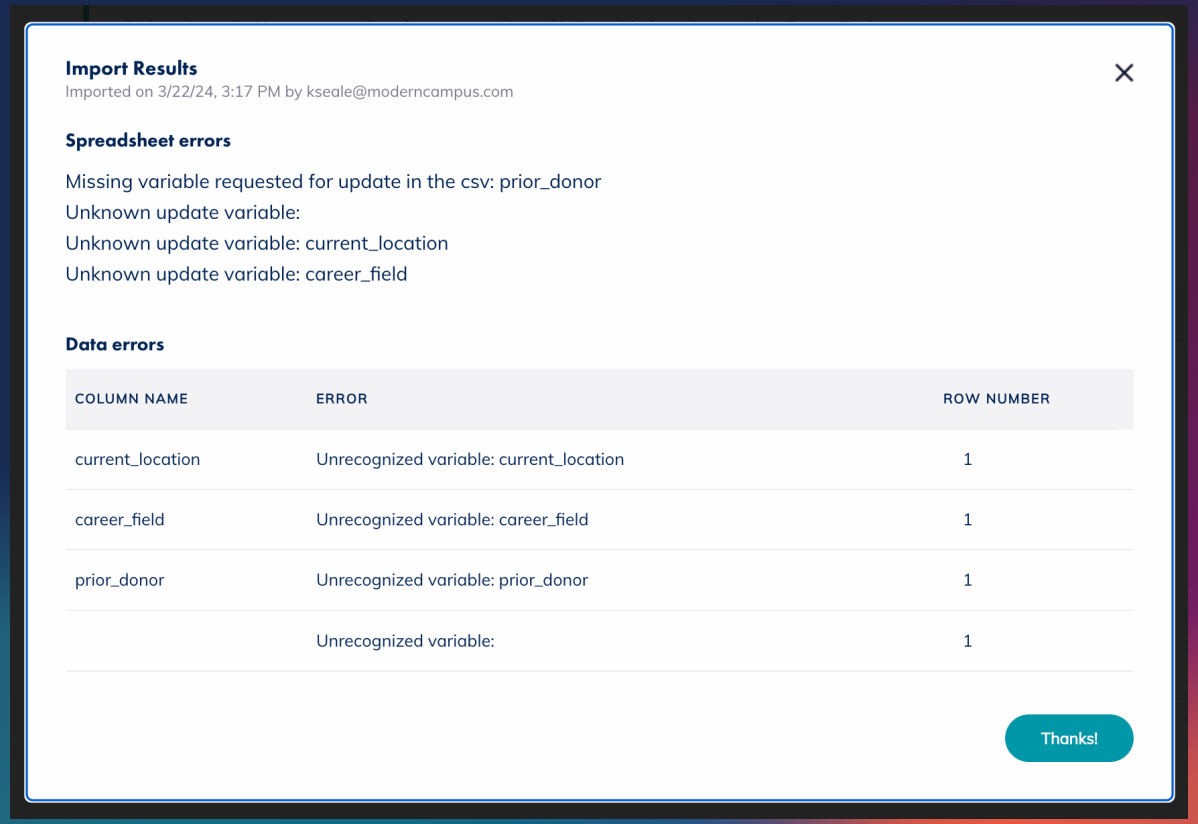




Unrecognized variable:
Data File Upload Error



Import Results
Imported on 3/22/24, 3:17 PM by kseale@moderncampus.com

Spreadsheet errors

Missing variable requested for update in the csv: prior_donor
Unknown update variable:
Unknown update variable: current_location
Unknown update variable: career_field

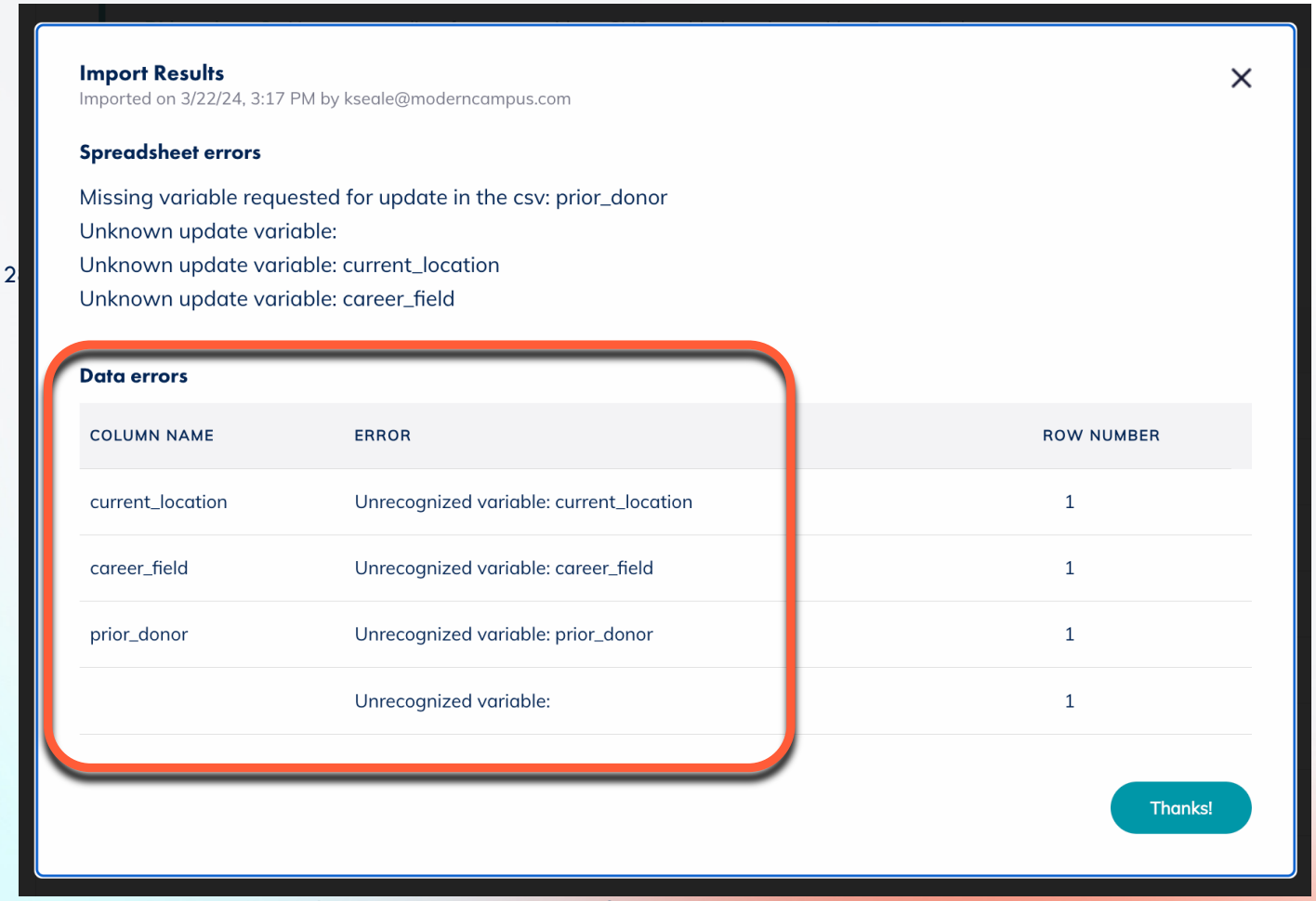
Data errors

COLUMN NAME	ERROR	ROW NUMBER
current_location	Unrecognized variable: current_location	1
career_field	Unrecognized variable: career_field	1
prior_donor	Unrecognized variable: prior_donor	1
	Unrecognized variable:	1

Thanks!

Unrecognized variable:

1. Variable (custom field) has not been created.
2. Variable (custom field) has been mislabeled.



Import Results
Imported on 3/22/24, 3:17 PM by kseale@moderncampus.com

Spreadsheet errors

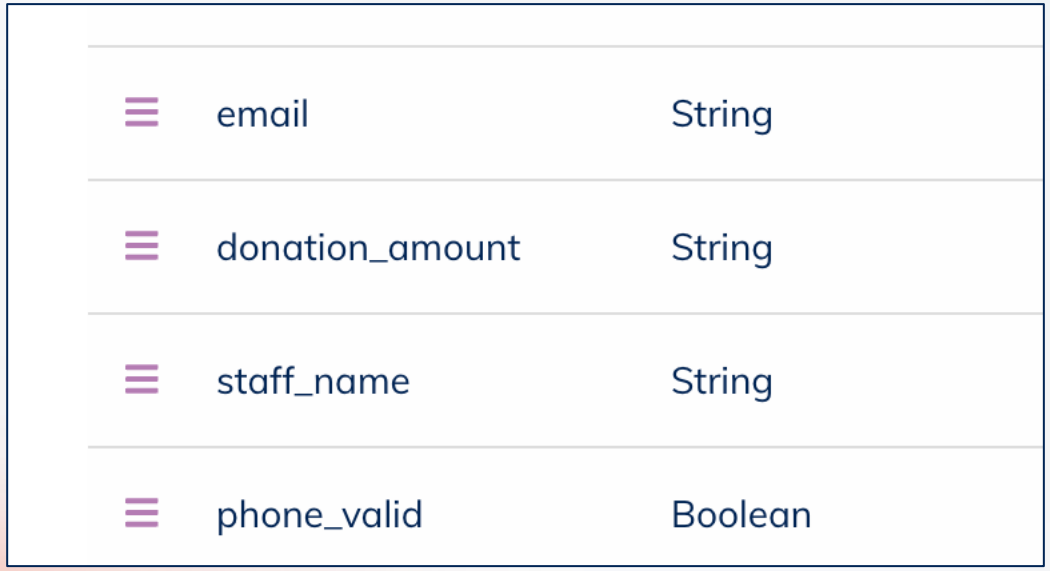
Missing variable requested for update in the csv: prior_donor
Unknown update variable:
Unknown update variable: current_location
Unknown update variable: career_field

Data errors

COLUMN NAME	ERROR	ROW NUMBER
current_location	Unrecognized variable: current_location	1
career_field	Unrecognized variable: career_field	1
prior_donor	Unrecognized variable: prior_donor	1
	Unrecognized variable:	1

Thanks!

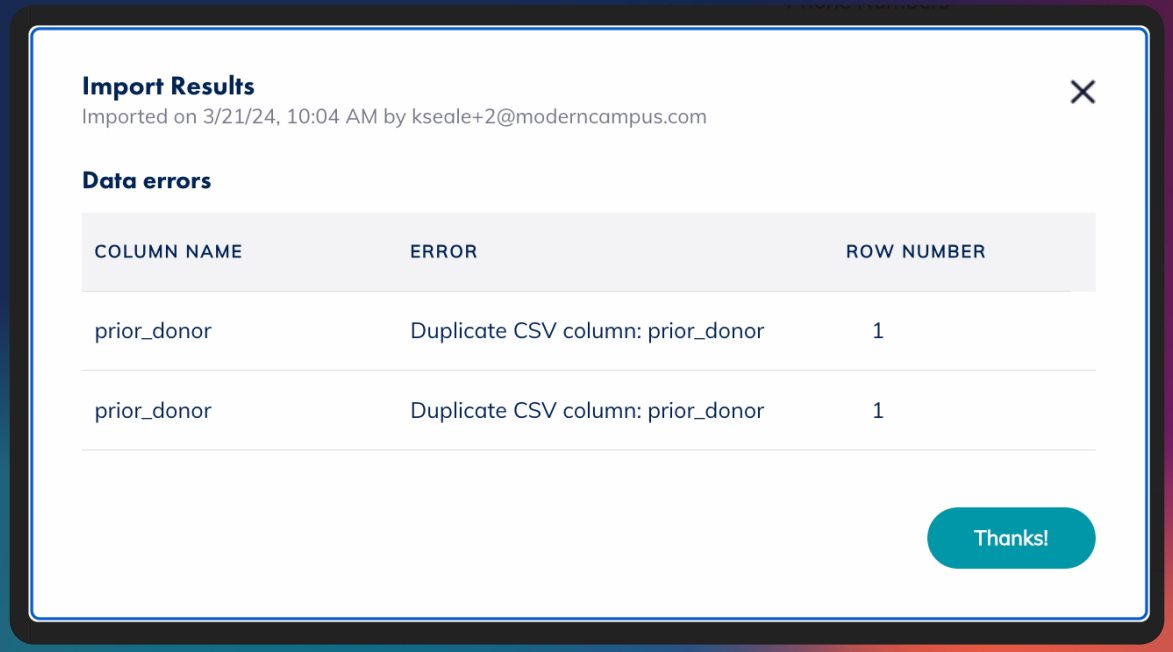
D	E	F
ail	dollar_amount	staff_na
s	$500.00	Joe
	$25.00	Joe
ations	$80.00	Joe
		Joe
ations	N/A	Kris



email	String
donation_amount	String
staff_name	String
phone_valid	Boolean

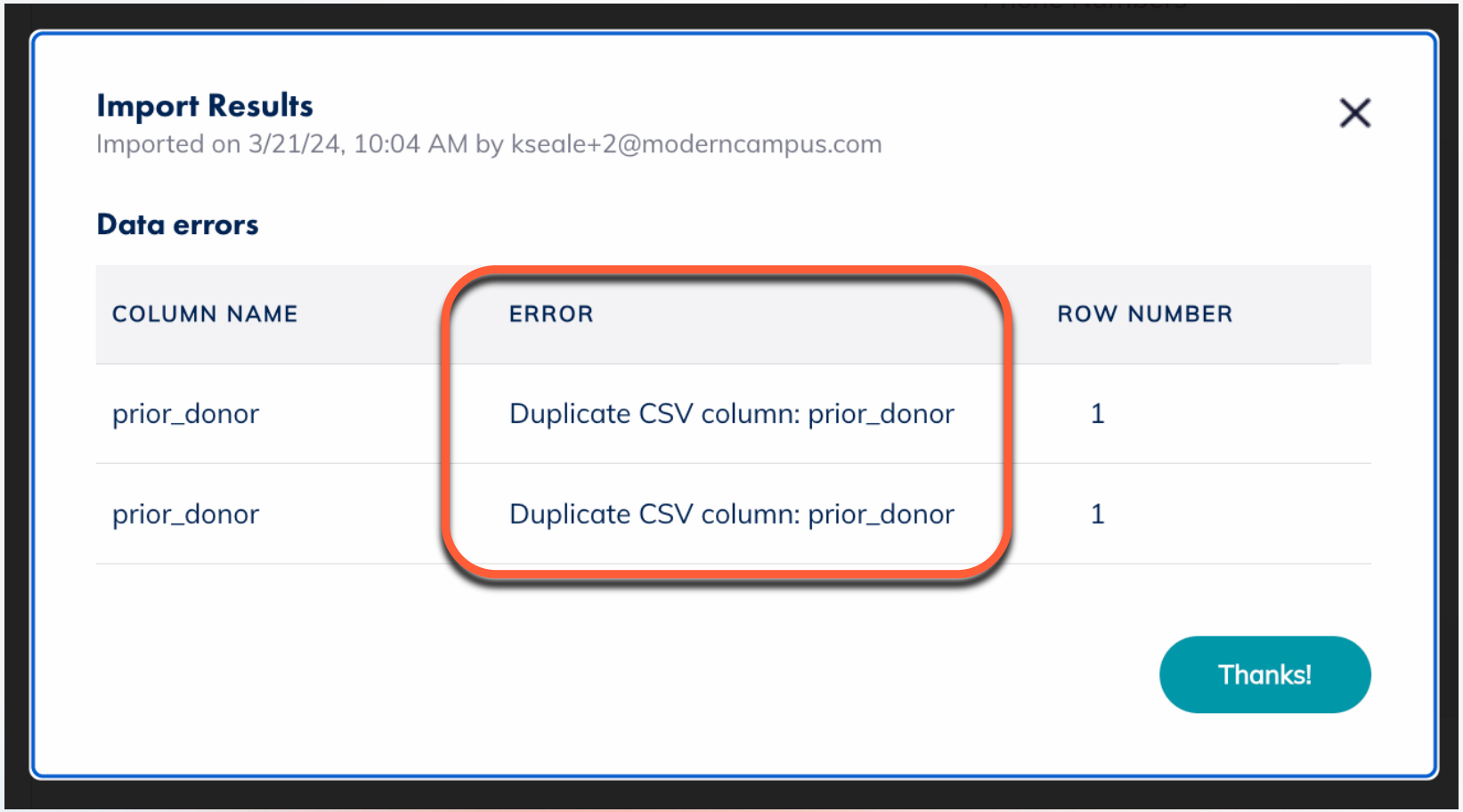
Duplicate CSV column:

Data File Upload Error



Duplicate CSV Column:

Two identical column headers



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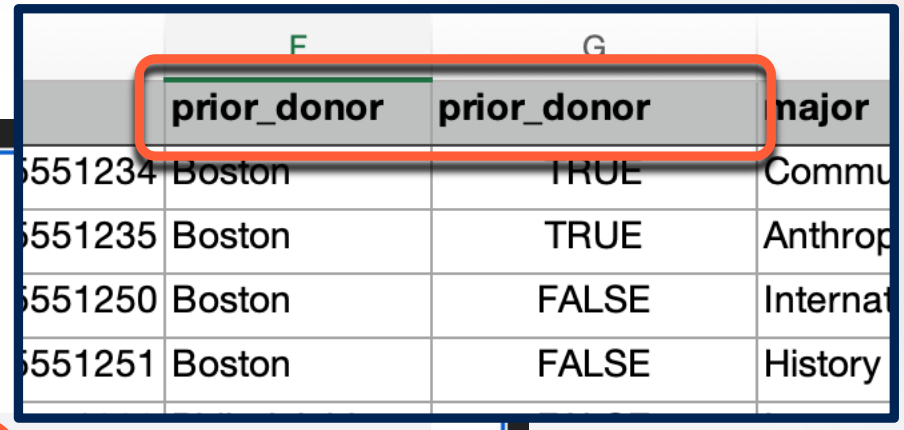


	F	G	
	prior_donor	prior_donor	major
5551234	Boston	TRUE	Commu
5551235	Boston	TRUE	Anthrop
5551250	Boston	FALSE	Internat
5551251	Boston	FALSE	History

Import Results

Imported on 3/21/24, 10:04 AM by kseale+2@moderncampus.com

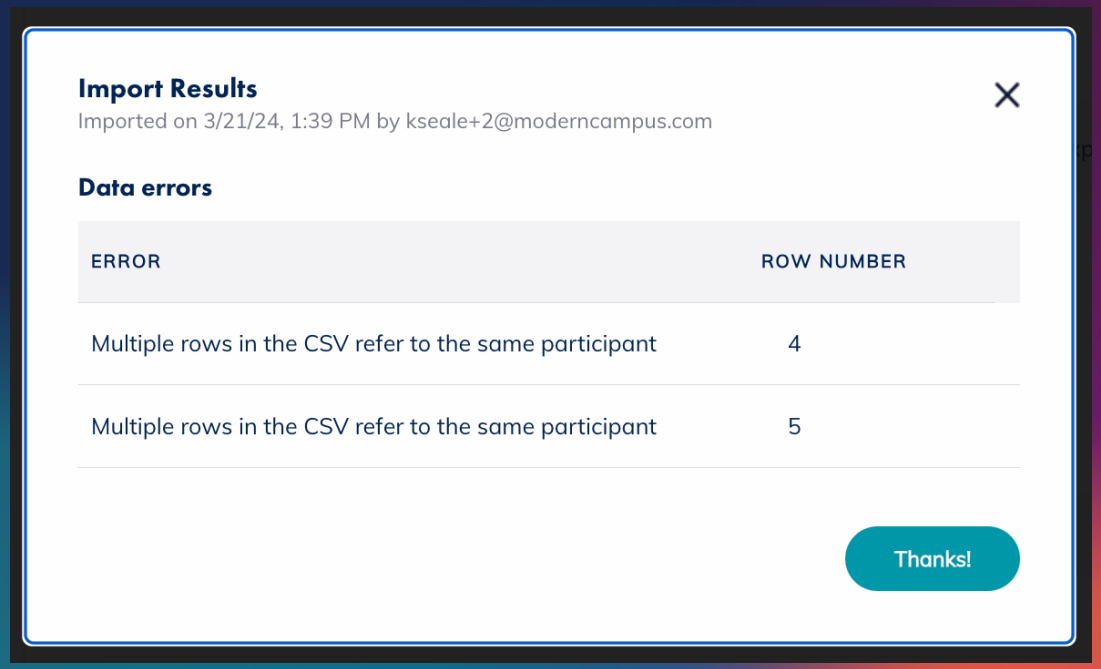
Data errors

COLUMN NAME	ERROR	ROW NUMBER
prior_donor	Duplicate CSV column: prior_donor	1
prior_donor	Duplicate CSV column: prior_donor	1

Thanks!

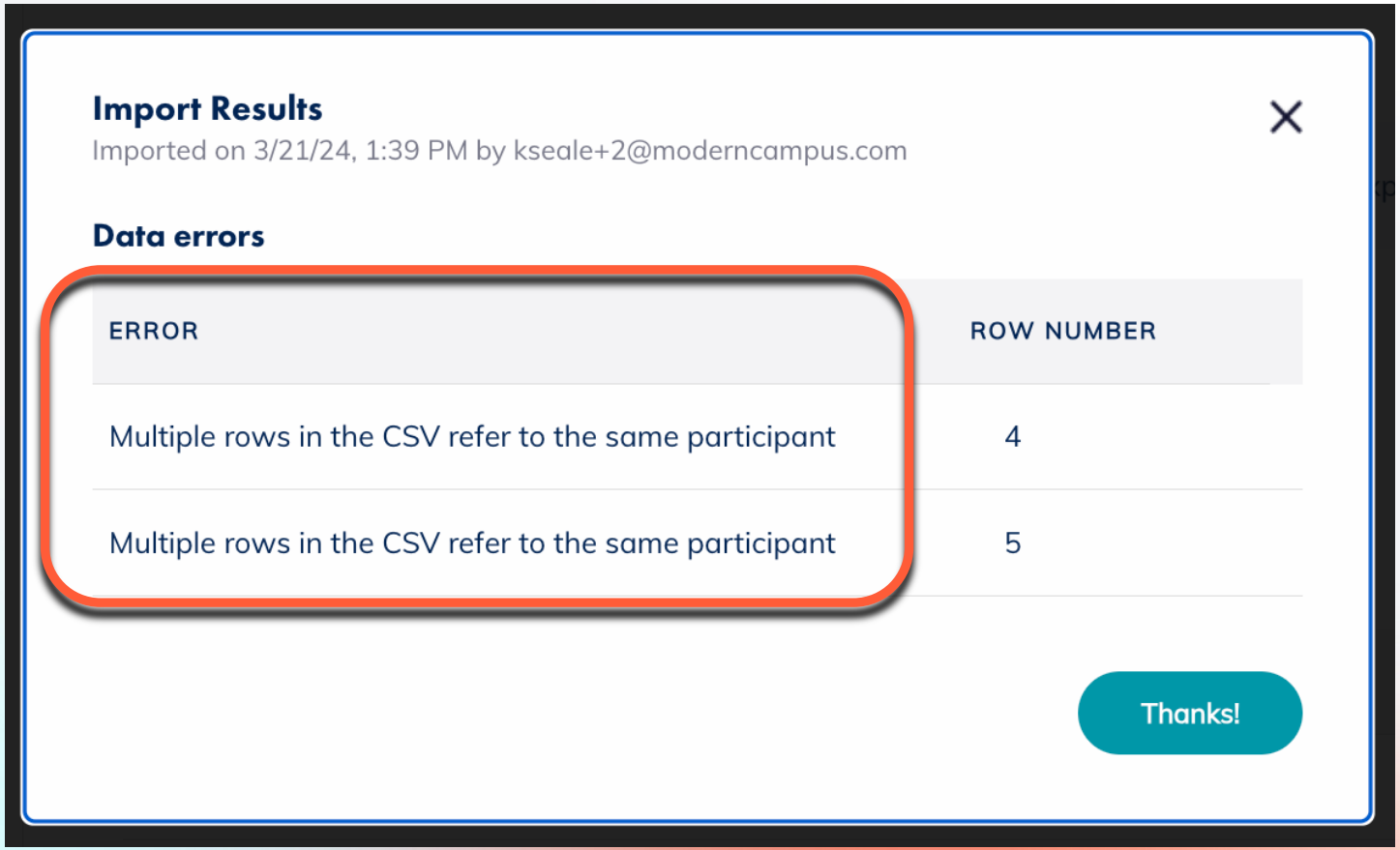
Multiple rows in the CSV refer to the same participant

Data File Upload Error



Multiple rows in the CSV refer to the same participant

- Two contacts or rows have the same ID
- There are blank rows that are being recognized as contacts



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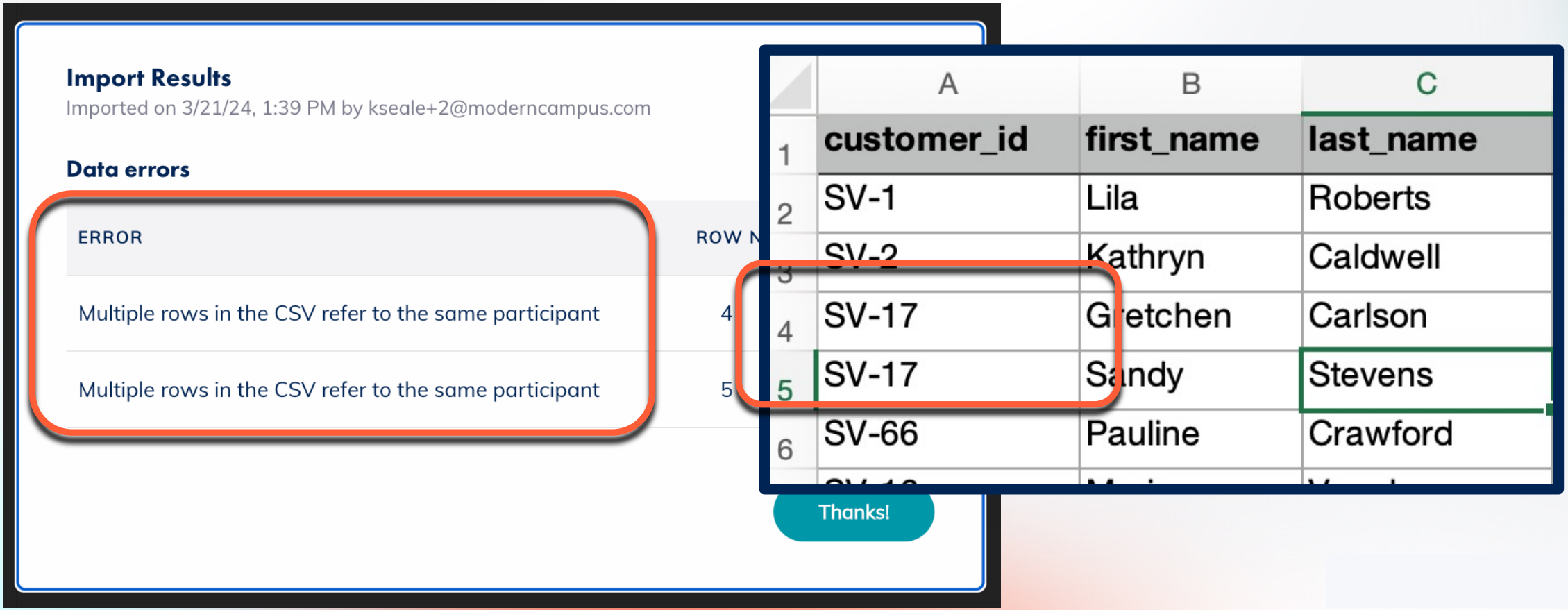


Demo Error Troubleshooting In App

- Upload data file
- Correct errors
- Show how to search errors in knowledge base

Incorrect Phone Number

Incorrect Phone Number

- Step 1: Mark this contact as “Invalid” to ensure they don’t get any messages.
- Step 2: Verify and update the number.
  - In some cases, it might be a mom’s phone number, and she can provide the correct number. When this happens, you can simply update the phone number in your
  - Manual Imports: Update the number in your data file (look in SIS or CRM to update manually)
  - Automatic Imports: Update the number in your management system or system of record that communicates with Message.
- Step 3: Revalidate the number – This is NOT automatic!

Locate landlines

- Export contacts
- Sort the column
- sys_phone_type
  - Fixed = a landline
  - Voip = a landline / unreachable number
  - Unknown

Data Clean-Up

New to Data Clean-Up?

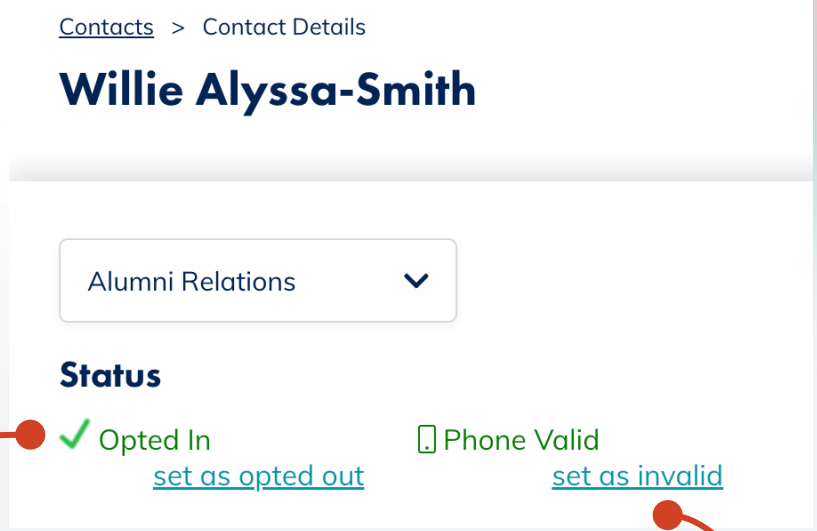
Contact support to strategize!

Archiving vs. Deleting

- Archiving (keep your data):
  - Retains all data within the messaging system.
  - Can be performed by program or account admin.
  - Moves contact between groups or opts them out.
- Deleting (delete your data):
  - Done by message support.
  - Permanently removes contact data and message history.
  - Recommended only for true duplicates or contacts without message history

Archiving

- Option 1: Update group_list via data file upload
  - Pull list of inactive individuals from your CRM
  - Update their group_list to a new group
    - group_list ideas
      - Inactive
      - Archive
      - Graduated
      - Make it easy to see by making the group_list all caps!
- Option 2: Opt-out inactive contacts
  - USE CAUTION!
  - Ensures 100% these contacts will NOT receive message
  - If you might want to contact these folks again EVER, do not opt them out! ☺
- Option 3: Mark as "phone invalid"

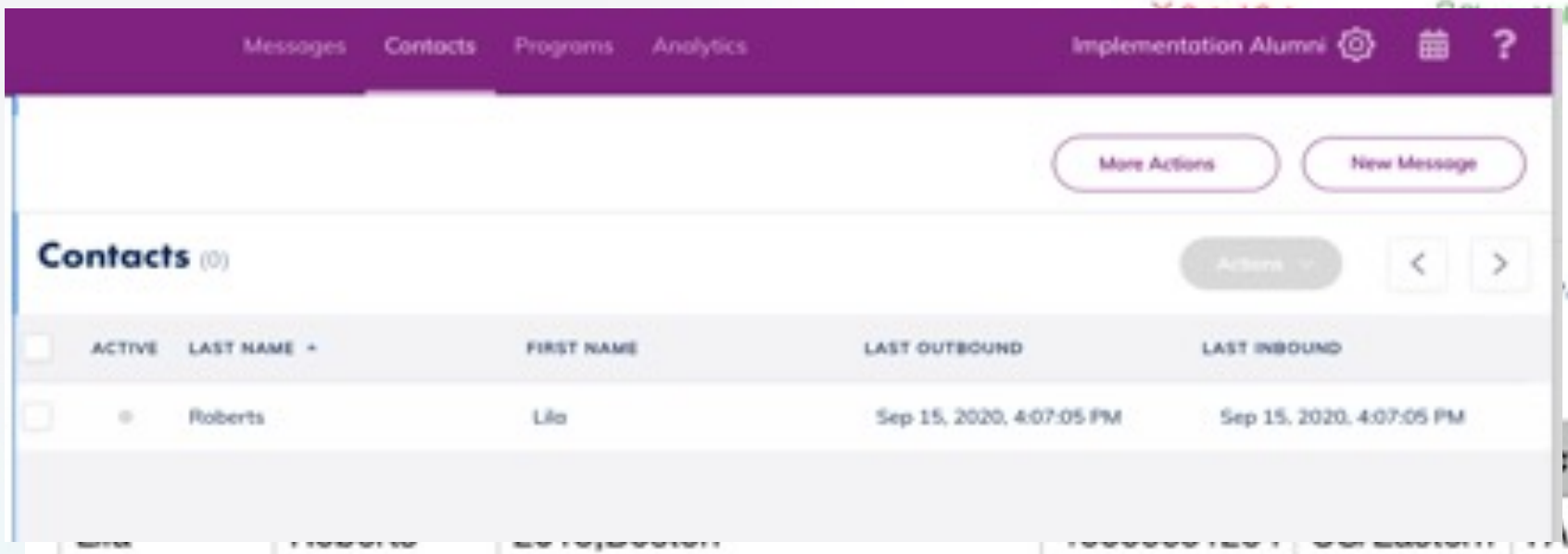


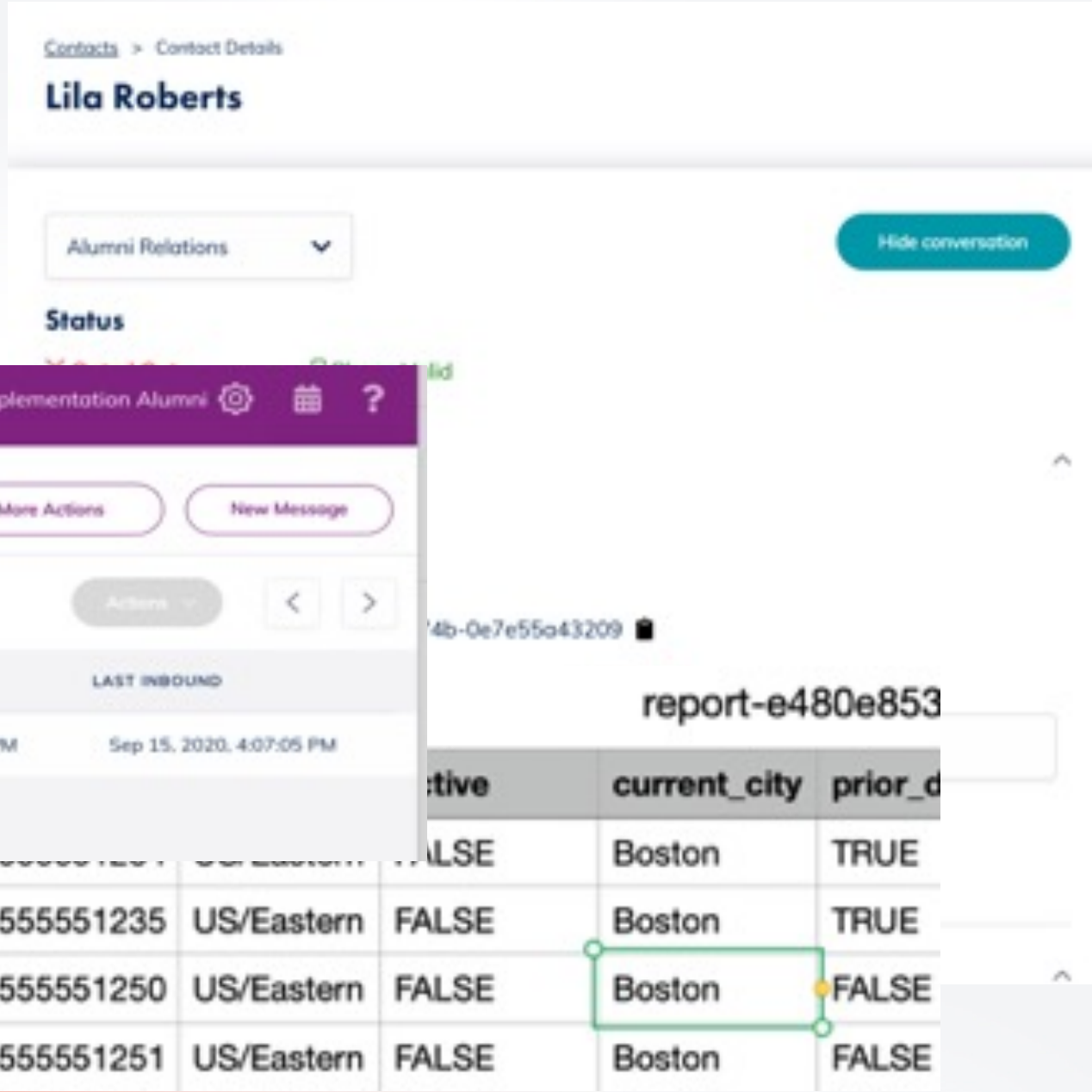
Archiving: Update the Contact's group_list

- Works well if you have a lot of counselor level users
- No counselors have access to the **ARCHIVE** group_list

	A	B	C	
1	**first_name**	**last_name**	**group_list**	**ph**
2	Lila	Roberts	ARCHIVE	
3	Kathryn	Caldwell	ARCHIVE	
4	Gretchen	Carlson	ARCHIVE	
5	Sandy	Stevens	ARCHIVE	
6	Pauline	Crawford	ARCHIVE	
7	Maria	Vaughn	ARCHIVE	
8	Willie	Boyd	ARCHIVE	
9	Winifred	Lloyd	ARCHIVE	
10	Yolanda	Curry	ARCHIVE	
11	Darin	Abbott	ARCHIVE	
12	Tony	Rogers	ARCHIVE	
13	Vincent	Lee	ARCHIVE	

Opt-Out Your Contacts





What affects data clean up strategy?

- Record Retention Policy
- Type of Institution
- Rotating Population
- Program Size
- group_list structure in your programs
- Frequency of Data Upload

Add a Single Contact

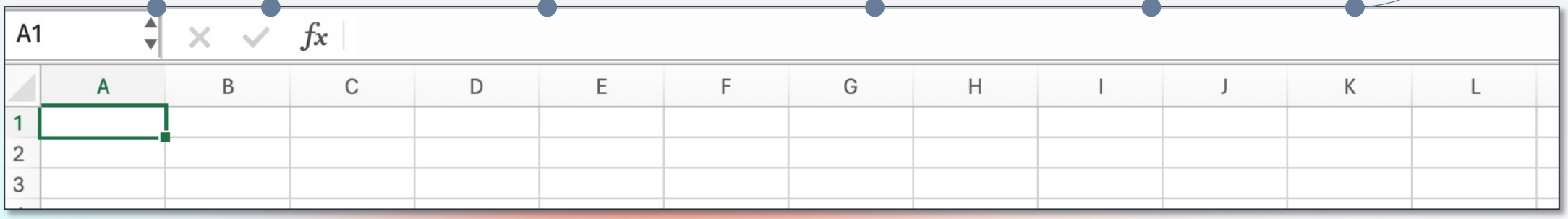
Adding a Single Contact

- Counselors must have this enabled
- This is NOT a go-to for updating contacts, it will be overwritten by new data files
- When should I use this feature?
  - If you want add yourself as a test contact
  - You need to send a quick message to a new contact
  - You will MOSTLY use your data upload or rely on automated import

How to add a single contact

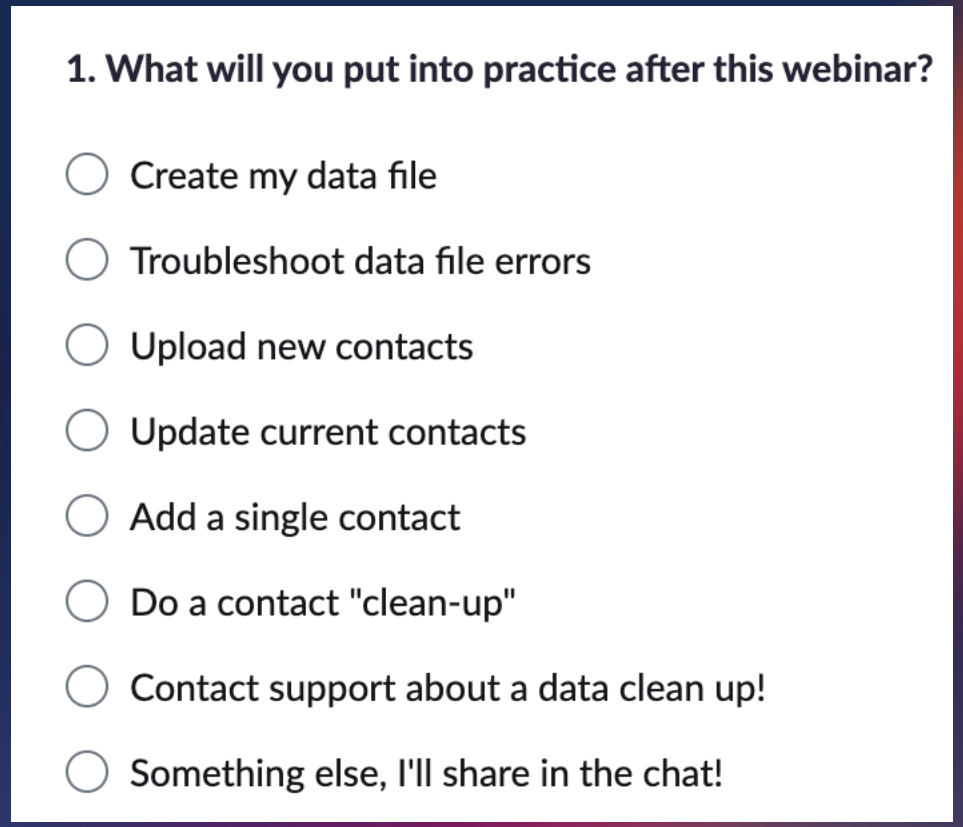
When to use a Campaign Message

- Send FAFSA info to students with 2.5 GPS or lower
- Send to a list of FAFSA night attendees
- Pull a list of students signed up for a campus tour
- Invite a small group to a welcome night event
- Pull a list of students who haven't confirmed for orientation
- Pull a list of students with an unpaid balance



What will you put into practice after this webinar?

Answer in the poll!



Q&A

Please put your questions in the Q&A box.

I'll get to as many as possible and follow up via email if more research is needed!

Thank You

See you next month!