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For Life



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

Data Upload Errors

Learn how to manually upload your data and handle basic upload errors.

This webinar is MOST suited to account and program admin who do manual data uploads or updates!

Data Upload Errors

Learn how to manually upload your data and handle basic upload errors.

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Agenda

1. Intro
2. Data file do's and don'ts
3. Data file upload
4. Contact isn't updating
5. Upload errors
6. Q&A
7. Close



Data File Background Info

What is a data file?

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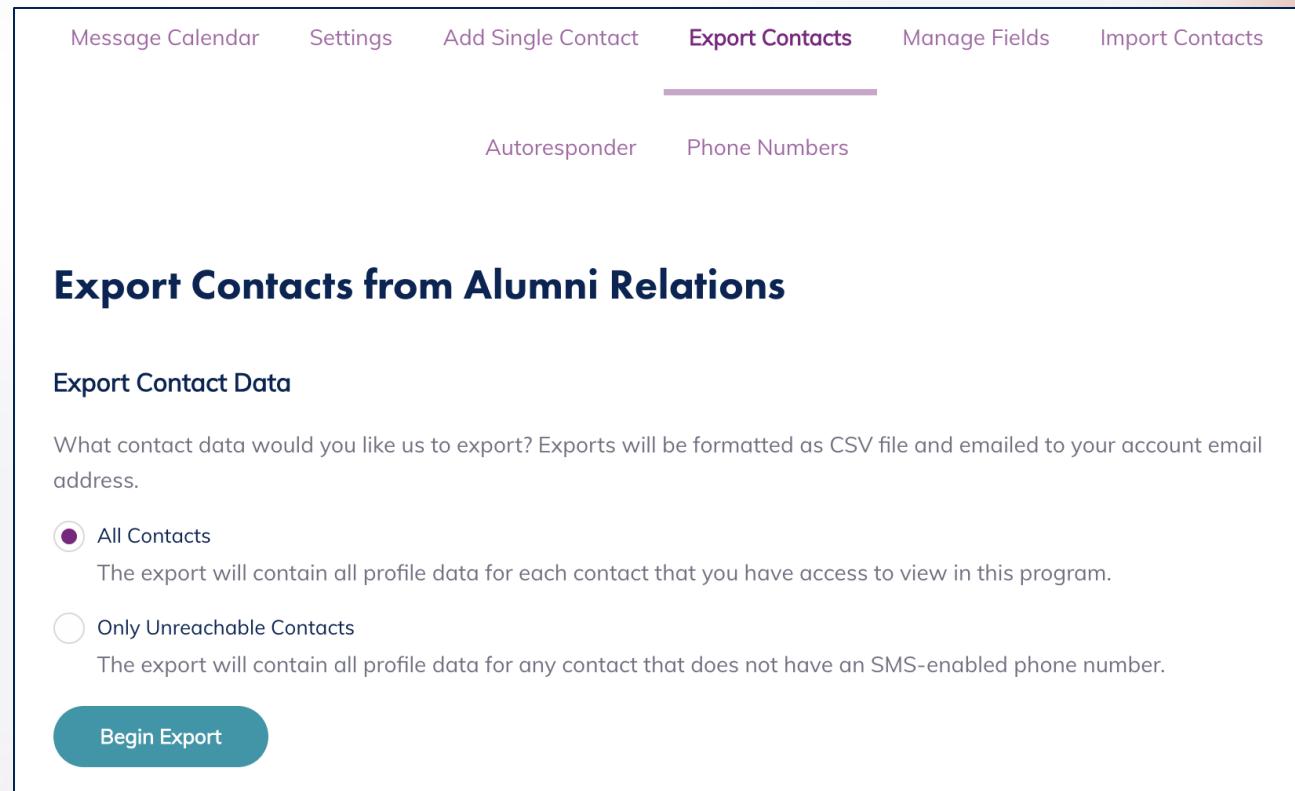
- Used to update contacts or add new contacts
- Always a .csv file
- Contains contact information used in Message
- Can be manually updated by program and account admin

A	B	C	D	E	
customer_id	major	donation_amo	staff_name	prior_donor	sig
10000	Communication	\$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	Communication	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!**



The screenshot shows a user interface for managing contacts. At the top, there are several navigation links: Message Calendar, Settings, Add Single Contact, Export Contacts (which is underlined in purple, indicating it is the active tab), Manage Fields, and Import Contacts. Below these, there are two sub-links: Autoresponder and Phone Numbers. The main content area is titled "Export Contacts from Alumni Relations". Under this title, there is a section titled "Export Contact Data" with the sub-instruction: "What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address." Two radio buttons are provided for selection:

- All Contacts: The export will contain all profile data for each contact that you have access to view in this program.
- Only Unreachable Contacts: The export will contain all profile data for any contact that does not have an SMS-enabled phone number.

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!

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	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

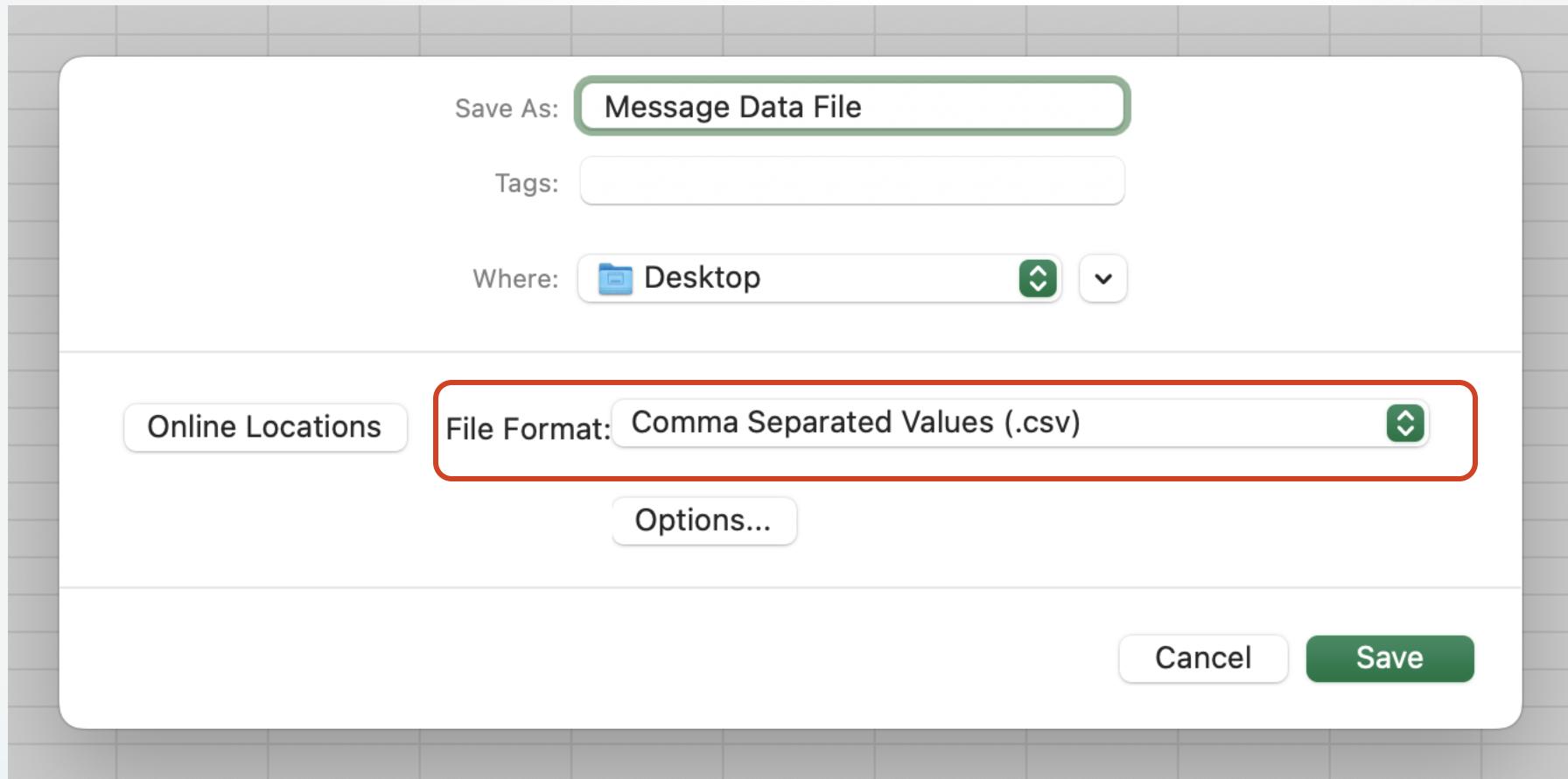
- Export Contacts
- Retrieve File
- Delete extra columns

Create Your Error Free 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



Column headers must be all lower case, no spaces

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

Column headers must match your field name 100%

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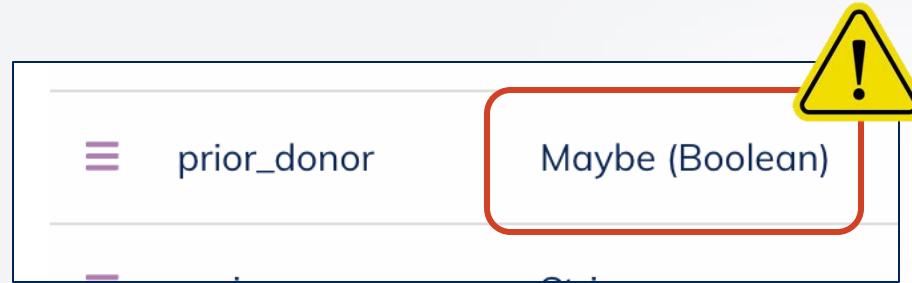
D	E	F
ail	dollar_amount	staff_na
s	\$500.00	Joe
	\$25.00	Joe
ations	\$80.00	Joe
		Joe
ations	N/A	Kris

≡	email	String
≡	dollar_amount	String
≡	staff_name	String
≡	phone_valid	Boolean

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



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Boolean	Displayed as a checkbox with 2 possible values called "true" and "false"	true/false
---------	--	------------

	G	H
name	prior_donor	signalv
	FALSE	300
	YES	225301
	NO	225306
	TRUE	225307
		225318

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

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

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	A	B	C	D	E
1	first_name	last_name	group_list	phone	
2	Lila	Roberts	2015;Boston	15555551234	
3	Kathryn	Caldwell	2017;NYC	15555551235	
4	Gretchen	Carlson	2016;Philadelphia	15555551250	
5	Sandy	Stevens	2006;Baltimore	15555551251	
6	Pauline	Crawford	2016;Philadelphia	15555551299	
7	Maria	Vaughn	2017;NYC	15555551249	
8	Willie	Boyd	2015;Boston	15555551269	
9	Winifred	Lloyd	2016;Philadelphia	15555551285	
10	Yolanda	Curry	2006;Baltimore	15555551328	
11	Darin	Abbott	2006;Baltimore	15555551244	
12	Tony	Rogers	2006;Baltimore	15555551272	
13	Vincent	Lee	2015;Boston	15555551248	
	Julia	Ford	2006;Baltimore	15555551005	

Create Your File

- Import New Contacts: Required Fields

- **customer_id** – HIGHLY RECOMMENDED
- **first_name**
- **last_name**
- **group_list**
- **phone_number**

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	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		

Data File Upload Options

Import Contacts Page

Select your
data file

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

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Import Contacts to Alumni Relations

What file do you want to import?

Please select a CSV file to import (12.5MB max)

Importing from [Contact Update Spreadsheet.csv](#)

[Replace file](#)

How do you want to handle the contacts in your file?

You can ignore new contacts or existing contacts by unchecking the options below. At least one option must be checked.

- Import new contact
- Update existing contacts

How do you want to handle errors?

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

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

[Cancel](#)

[Start Import](#)

Import Contacts Page

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

Will NOT update unless there are zero errors.

Import Contacts to Alumni Relations

What file do you want to import?

Please select a CSV file to import (12.5MB max)

Importing from Contact Update Spreadsheet.csv

Replace file

How do you want to handle the contacts in your file?

You can ignore new contacts or existing contacts by unchecking the options below. At least one option must be checked.

- Import new contact
- Update existing contacts

How do you want to handle errors?

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

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

Cancel

Start Import

You can ignore new contacts or existing contacts by unchecking the options below. At least

- Import new contact
- Update existing contacts

How do you want to handle errors?

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

2

- Skip the contact and continue the import
- Only import the file if it contains no 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
4	Sandy	Carlson	ARCHIVE

- Column headers must be all lowercase
- 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	Histor

☰ 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
5	Sandy	Stevens	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

Why aren't my contacts updating?

Import Contacts to Admissions 2025

[Import Contacts](#)1 - 25  of 3

START TIME	STATUS	RESULTS	ERROR FILE	IMPORTED BY
2/5/25 15:53	Success	0 added, 0 ignored, 108 updat	None	kseale+1@moderncampus....
2/5/25 15:52	Fail	View 1 errors		kseale+1@moderncampus....
2/5/25 15:52	Fail	View 1 errors		kseale+1@moderncampus....

	A	B	C	
1	customer_id	first_name	last_name	sp24
2	10000	Lila	Roberts	
3	10001	Kathryn	Caldwell	
4		Gretchen	Carlson	
5	10003	Sandy	Stevens	
6	10004	Pauline	Crawford	
7	10005	Maria	Vaughn	
8	10006	Willie	David	

Contact is missing “customer_id”

- Contact updates must include either “customer_id” or “signalvine_id”
- DIY: Use an xlookup to match signalvine_id to customer_id

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	A	B	C	D
1	customer_id	phone	signalvine_id	
2		10000	15555551234	[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$T:\$T)
3		10001	15555551235	
4		10002	15555551250	

	A	B	C	sp24
1	customer_id	first_name	last_name	
2	10000	Lila	Roberts	
3	10001	Kathryn	Caldwell	
4		Gretchen	Carlson	
5	10003	Sandy	Stevens	
6	10004	Pauline	Crawford	
7	10005	Maria	Vaughn	
8	10006	Willie	Roud	

Contact is missing “customer_id”

- Contact customer support for help with updating / adding customer_id
- message-support@moderncampus.com

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	A	B	C	
1	customer_id	first_name	last_name	sp24
2	10000	Lila	Roberts	
3	10001	Kathryn	Caldwell	
4		Gretchen	Carlson	
5	10003	Sandy	Stevens	
6	10004	Pauline	Crawford	
7	10005	Maria	Vaughn	
8	10006	Willie	Roud	

21	10019	Francis	Jackson
22	1002	Joann	Sullivan
23	10021	Thomas	Hanson
24	1002	Tiffany	Smith
25	10023	Elaine	Horton

Deleted leading 0's

Using the Format Cells dialog

1. Select the cells you want to format
2. Press **Ctrl+1** to open the Format Cells dialog
3. Select the Number tab
4. Select Custom from the Category list
5. In the Type box, enter the number format you want to use
6. Click OK

21	10019	Francis	Jackson
22	1002	Joann	Sullivan
23	10021	Thomas	Hanson
24	1002	Tiffany	Smith
25	10023	Elaine	Horton
26	10024	Daniel	Price

Basic Import Errors

How to View Errors

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

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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
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

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	F	
prior_donor	major	
YES	Comm	
YES	Anthr	
FALSE	Intern	
FALSE	Histor	

≡ prior_donor Maybe (Boolean)

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

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!

Duplicate CSV Column: Two identical column headers

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

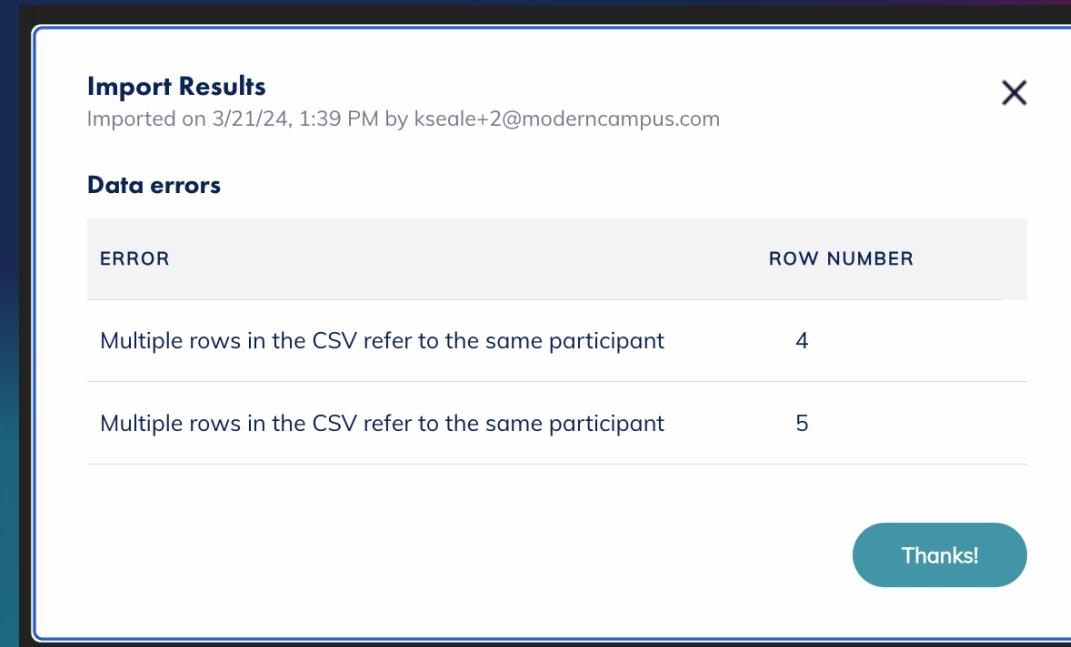
Data errors

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

Thanks!

F	G	H
	prior_donor	prior_donor
5551234	Boston	TRUE
5551235	Boston	TRUE
5551250	Boston	FALSE
5551251	Boston	FALSE

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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Import Results
Imported on 3/21/24, 1:39 PM by kseale+2@moderncampus.com

Data errors

ERROR	ROW NUMBER
Multiple rows in the CSV refer to the same participant	4
Multiple rows in the CSV refer to the same participant	5

Thanks!

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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Import Results
Imported on 3/21/24, 1:39 PM by kseale+2@moderncampus.com

Data errors

ERROR

Multiple rows in the CSV refer to the same participant

Multiple rows in the CSV refer to the same participant

ROW N	A	B	C
1	customer_id	first_name	last_name
2	SV-1	Lila	Roberts
3	SV-2	Kathryn	Caldwell
4	SV-17	Gretchen	Carlson
5	SV-17	Sandy	Stevens
6	SV-66	Pauline	Crawford
7	SV-18	M.	M.

Demo Error Troubleshooting In App

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

What will you put into practice after this webinar?

Answer in the poll!

1. What do you feel ready to do after this webinar?

- Create my data file
- Download my data file
- Troubleshoot data file errors
- Upload my data file
- Contact support for more help
- Something else, I'll share in the chat

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!