



# modern<sup>®</sup> campus

Engaging Modern Learners  
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.

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

# 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?

- 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	sign
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!**

The screenshot shows the 'Export Contacts' page in the Modern Campus interface. The top navigation bar includes links for 'Message Calendar', 'Settings', 'Add Single Contact', 'Export Contacts' (which is highlighted with a purple underline), 'Manage Fields', and 'Import Contacts'. Below the navigation bar, there are two sub-links: 'Autoreponder' and 'Phone Numbers'. The main heading is 'Export Contacts from Alumni Relations'. Underneath, it says 'Export Contact Data' and provides a description: 'What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.' There are two radio button options: 'All Contacts' (selected) and 'Only Unreachable Contacts'. Each option has a brief description of what data will be included in the export. At the bottom, there is a teal 'Begin Export' button.

Message Calendar Settings Add Single Contact **Export Contacts** Manage Fields Import Contacts

Autoreponder Phone Numbers

## Export Contacts from Alumni Relations

### Export Contact Data

What contact data would you like us to export? Exports will be formatted as CSV file and emailed to your account email address.

☒ 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.

[Begin Export](#)

# 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 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

11

# .CSV file

12

The image shows a 'Save As' dialog box with a light gray background and a white rounded rectangle for the form. The form is divided into sections by horizontal lines. The top section contains a 'Save As:' label followed by a text input field containing 'Message Data File', which is highlighted with a green border. Below this is a 'Tags:' label followed by an empty text input field. The next section has a 'Where:' label followed by a dropdown menu showing 'Desktop' with a folder icon, a green expand/collapse icon, and a small downward arrow icon. The bottom section has a tab labeled 'Online Locations' on the left. To its right is a 'File Format:' label followed by a dropdown menu showing 'Comma Separated Values (.csv)' with a green expand/collapse icon. Below the 'File Format' dropdown is an 'Options...' button. At the bottom right of the dialog are 'Cancel' and 'Save' buttons, with 'Save' being green and 'Cancel' being white with a gray border.

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
	<b>customer_id</b>	<b>major</b>	<b>Email</b>	<b>donation_am</b>
4 r	10000	Communications		\$50
4 r	10001	Anthropology		\$2



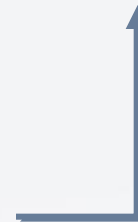
# Column headers must **match your field name** **100%**

D	E	F
ail	<b>dollar_amount</b>	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


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




☰ prior\_donor Maybe (Boolean)

15

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

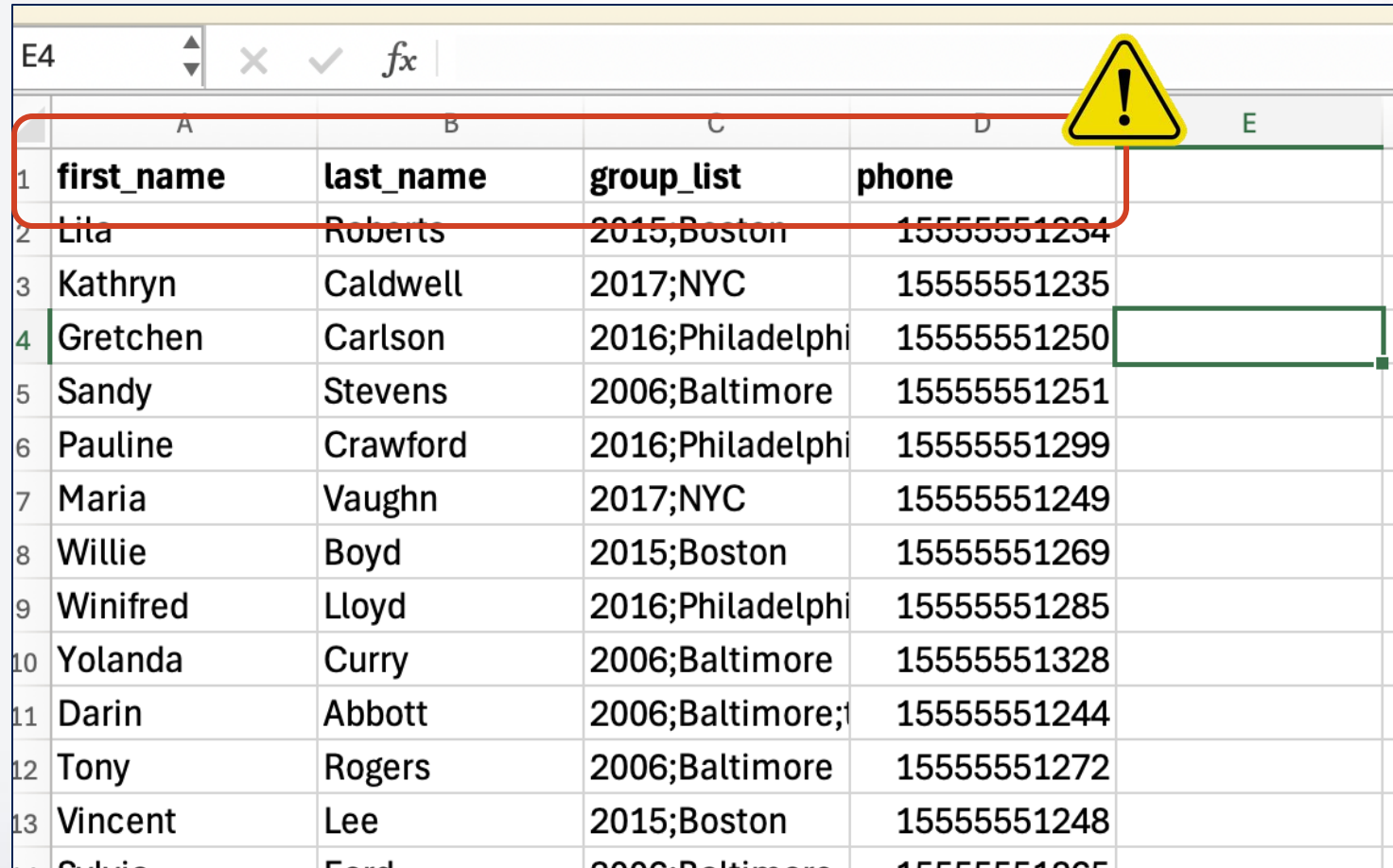


	G	H
name	prior_donor	signalv
	FALSE	300
	YES	225301
	NO	225306
	TRUE	225307
		225318



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

# You always need **customer\_id** or **signalvine\_id** when updating



The image shows an Excel spreadsheet with a table containing customer information. The table has four columns: first\_name, last\_name, group\_list, and phone. The first row of data is highlighted with a red box, and a yellow warning triangle is placed over it, indicating a missing key field. The second row of data is highlighted with a green box.

	A	B	C	D	E
	first_name	last_name	group_list	phone	
1	Lila	Roberts	2015;Boston	15555551234	
2	Kathryn	Caldwell	2017;NYC	15555551235	
3	Gretchen	Carlson	2016;Philadelphi	15555551250	
4	Sandy	Stevens	2006;Baltimore	15555551251	
5	Pauline	Crawford	2016;Philadelphi	15555551299	
6	Maria	Vaughn	2017;NYC	15555551249	
7	Willie	Boyd	2015;Boston	15555551269	
8	Winifred	Lloyd	2016;Philadelphi	15555551285	
9	Yolanda	Curry	2006;Baltimore	15555551328	
10	Darin	Abbott	2006;Baltimore;	15555551244	
11	Tony	Rogers	2006;Baltimore	15555551272	
12	Vincent	Lee	2015;Boston	15555551248	
13	Sylvia	Ford	2006;Baltimore	15555551265	

# 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	<b>customer_id</b>	<b>first_name</b>	<b>last_name</b>	<b>group_list</b>	<b>phone_number</b>
2					
3					
4					
5					

- Update existing contacts

- customer\_id or signalvine\_id
- The field you want to update!

	A	B
1	<b>customer_id</b>	<b>donation_amount</b>
2		
3		

# Data File Upload Options

# Import Contacts Page

Select your  
data file

19

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

## 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?



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

23

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	<b>first_name</b>	<b>last_name</b>	<b>Group_List</b>
2	Lila	Roberts	ARCHIVE
3	Kathryn	Caldwell	ARCHIVE
4	Gretchen	Carlson	ARCHIVE
5	Sandy	Stevens	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	
	<b>prior_donor</b>	<b>major</b>
	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	<b>first_name</b>	<b>last_name</b>	<b>group_list</b>
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	<a href="#">0 added, 0 ignored, 108 updat</a>	None	kseale+1@moderncampus....
2/5/25 15:52	Fail	<a href="#">View 1 errors</a>		kseale+1@moderncampus....
2/5/25 15:52	Fail	<a href="#">View 1 errors</a>		kseale+1@moderncampus....



	A	B	C	
1	<b>customer_id</b>	<b>first_name</b>	<b>last_name</b>	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	Boyd	

# 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

28

	A	B	C	D
1	customer_id	phone	signalvine_id	
2	10000	1555551234	Alumni Relations!\$T:\$T)	
3	10001	1555551235		
4	10002	1555551250		

	A	B	C	
1	<b>customer_id</b>	<b>first_name</b>	<b>last_name</b>	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 customer support for help with updating / adding customer\_id
- [message-support@moderncampus.com](mailto:message-support@moderncampus.com)

29

	A	B	C	
1	<b>customer_id</b>	<b>first_name</b>	<b>last_name</b>	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	

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

# Deleted leading o'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

# Basic Import Errors



# How to View Errors

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

	F	
	<b>prior_donor</b>	<b>majo</b>
	YES	Com
	YES	Anthr
	FALSE	Inter
	FALSE	Histo

☰	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.

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

## Import Results

Imported on 3/22/24, 3:17 PM by kseale@modern campus.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!



email

String



donation\_amount

String



staff\_name

String



phone\_valid

Boolean

# Duplicate CSV column: Data File Upload Error

**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

### 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

### 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	
	prior_donor	prior_donor	major
551234	Boston	TRUE	Comm
551235	Boston	TRUE	Anthrop
551250	Boston	FALSE	Internat
551251	Boston	FALSE	History

# Multiple rows in the CSV refer to the same participant

## Data File Upload Error

**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

43

**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

44

## 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

Thanks!

# 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!