

Manual Data Uploads

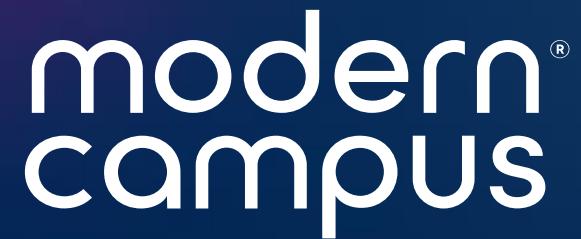
Learn best practices and how to customize Involve your student portal.

Target Audience: Account and Program Admin

Kelsey Seale

Wednesday, October 1, 2025

Introduce
yourself in the
chat! Which
institution are
you representing?



Manual Data Uploads

Learn best practices and how to customize Involve your student portal.

Target Audience: Account and Program Admin

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Post-Webinar Survey

- 2 minutes!
- We love knowing what you like or would like improved!
- Really helps me (Kelsey) out when presenting to my bosses ☺
- I'll provide a link at the end or you will get an email tomorrow!!!

* 3. Overall, were you satisfied with your training?

Yes

No

* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Agenda

1. Welcome
2. About the data file
3. Uploading your data file
4. Troubleshooting errors
5. Q&A
6. 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	F
customer_id	major	donation_amt	staff_name	prior_donor	signature
10000	Communication	\$500.00	Joe	FALSE	225
10001	Anthropology	\$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	Anthropology	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 software interface for managing contacts. At the top, there is a navigation bar with the following items: 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-navigation items: Autoresponder and Phone Numbers. The main content area is titled "Export Contacts from Alumni Relations". Under this title, there is a section labeled "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." Below this, there are two radio button options: "All Contacts" (which is selected, indicated by a purple dot) and "Only Unreachable Contacts". A descriptive text for each option follows: "The export will contain all profile data for each contact that you have access to view in this program." and "The export will contain all profile data for any contact that does not have an SMS-enabled phone number." At the bottom of the form is a teal-colored "Begin Export" button.

Avoid an Error when re-uploading!

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

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

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

In Platform Demo

- Export Contacts
- Retrieve File
- Delete extra columns
- Reupload

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

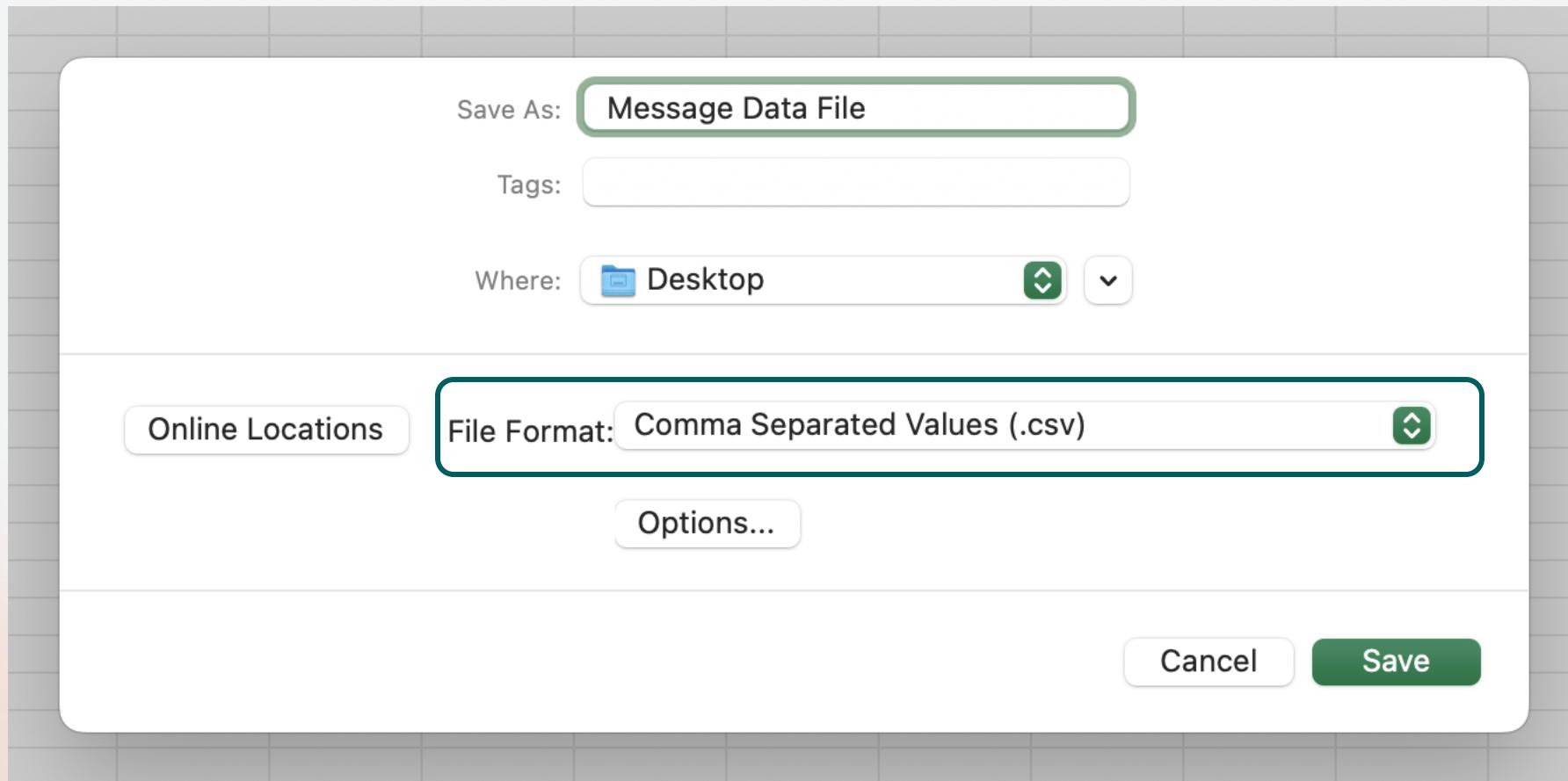
Note: Custom fields cannot be edited once they're created

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

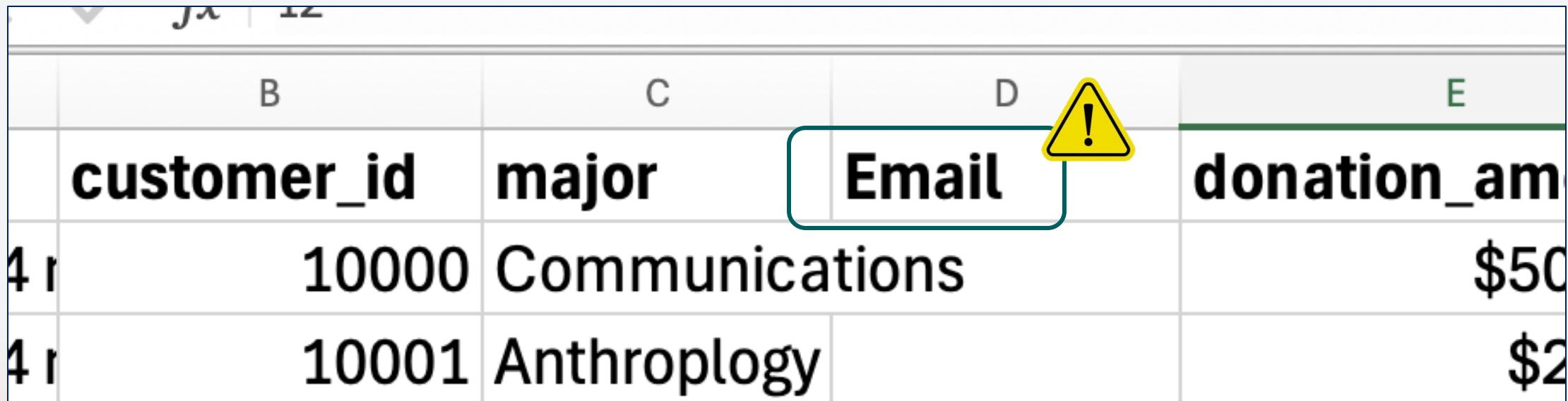
There's a cheat sheet at the bottom of → Program Tab; → Custom Fields

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

.CSV file



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



	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%



A screenshot of a spreadsheet application showing a table of data. The columns are labeled 'D', 'E', and 'F'. The data rows are labeled 'ail', 's', 'ations', and 'ations'. The 'E' column contains the field name 'dollar_amount'. The 'F' column contains the field name 'staff_na'. The 'ail' row has a value of '\$500.00' in the 'E' column and 'Joe' in the 'F' column. The 's' row has a value of '\$25.00' in the 'E' column and 'Joe' in the 'F' column. The 'ations' row has a value of '\$80.00' in the 'E' column and 'Joe' in the 'F' column. The 'ations' row has a value of 'N/A' in the 'E' column and 'Kris' in the 'F' column.

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



A screenshot of a configuration interface showing a list of fields. The fields are: 'email' (String), 'donation_amount' (String), 'staff_name' (String), and 'phone_valid' (Boolean). The 'donation_amount' field is highlighted with a green box and a warning icon.

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)



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



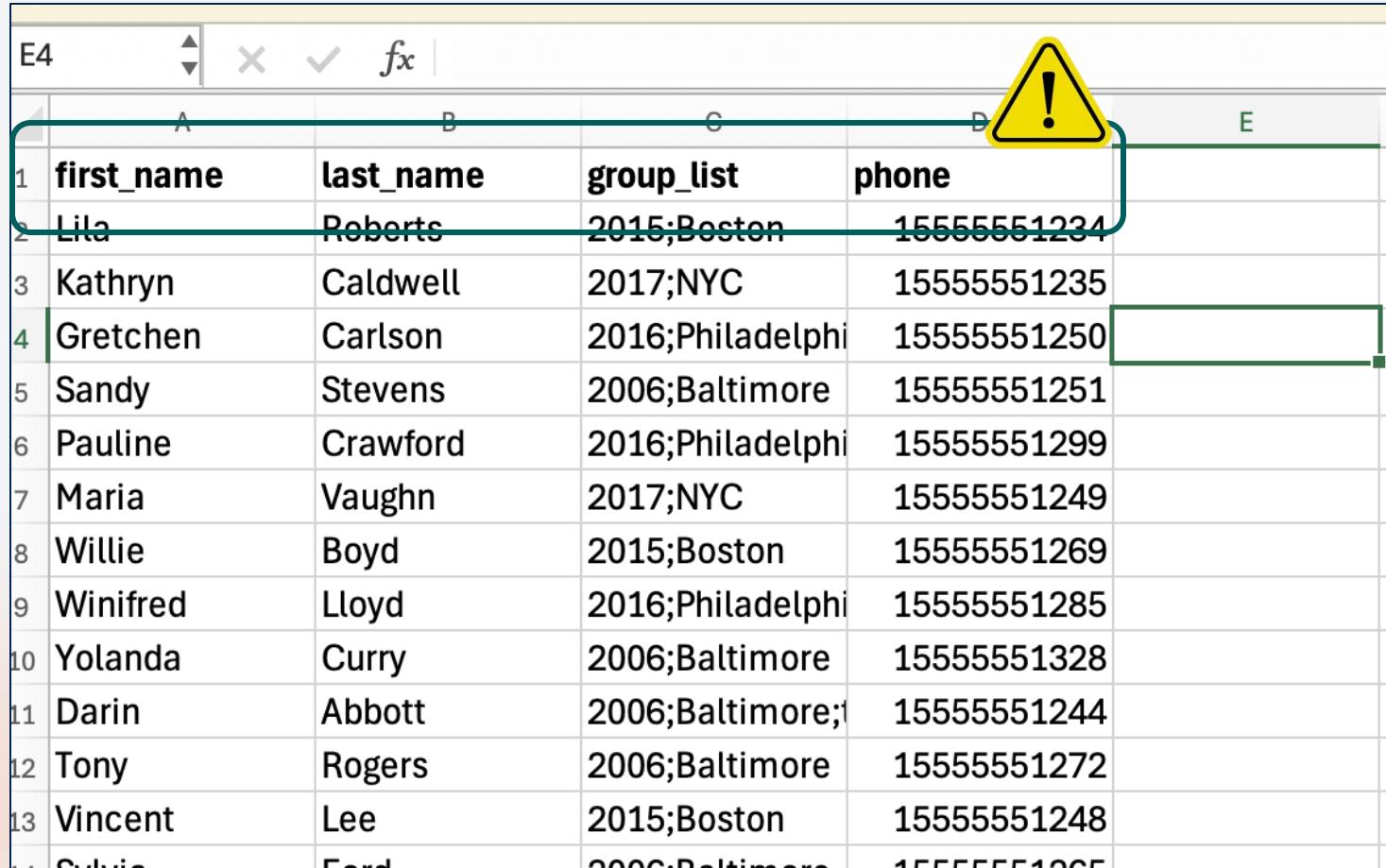
	G	H
name	prior_donor	signalval
	FALSE	300
	YES	225301
	NO	225306
	TRUE	225307
		225318



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



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



	E4	first_name	last_name	group_list	phone	
1		Lila	Roberts	2015;Boston	15555551234	
2		Kathryn	Caldwell	2017;NYC	15555551235	
3		Gretchen	Carlson	2016;Philadelphia	15555551250	
4		Sandy	Stevens	2006;Baltimore	15555551251	
5		Pauline	Crawford	2016;Philadelphia	15555551299	
6		Maria	Vaughn	2017;NYC	15555551249	
7		Willie	Boyd	2015;Boston	15555551269	
8		Winifred	Lloyd	2016;Philadelphia	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		Julia	Evans	2006;Baltimore	15555551005	

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

- **Update existing contacts**

- `customer_id` or `signalvine_id`
- The field you want to update!

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

Data File Upload Options

Import Contacts Page

Select your data file

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](#)

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[Cancel](#)

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

- Import new contact
- Update existing contacts

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

Demo data file upload in app

Implementation HE
Student Success

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

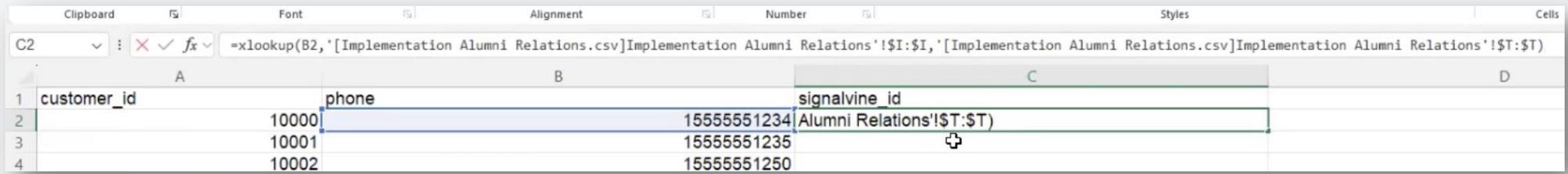
[Import Contacts](#)1 - 25  of 3

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	Walter	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



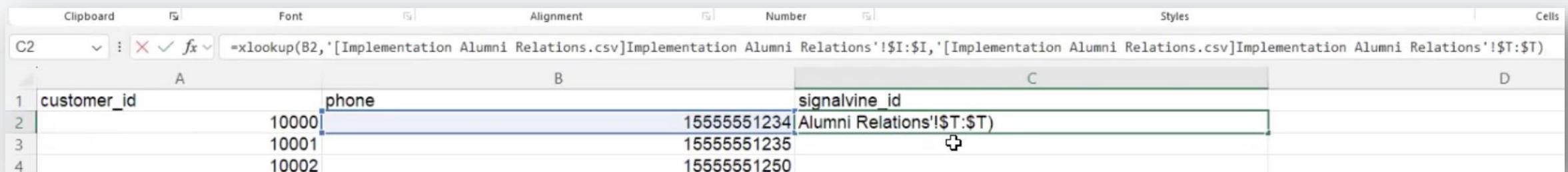
A screenshot of Microsoft Excel showing a formula being entered into cell C2. The formula is =xlookup(B2, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$I:\$I, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$T:\$T). The formula is partially visible in the formula bar above the grid. The grid consists of four columns (A, B, C, D) and four rows (1, 2, 3, 4). Column A contains 'customer_id', row 1. Column B contains 'phone', row 1. Row 2 contains '10000'. Row 3 contains '10001'. Row 4 contains '10002'. Column C contains 'signalvine_id', row 1. Row 2 contains '15555551234'. Row 3 contains '15555551235'. Row 4 contains '15555551250'. The formula bar shows the full formula: =xlookup(B2, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$I:\$I, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$T:\$T)

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

	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	Royd	

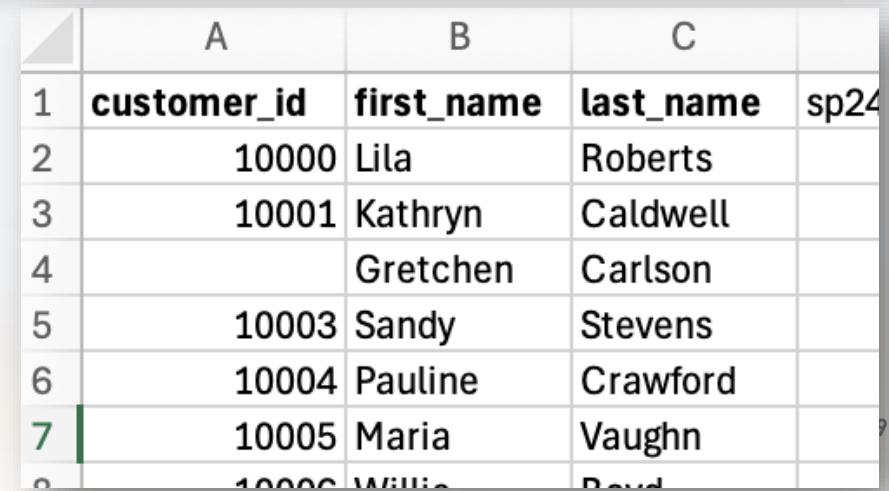
Contact is missing “customer_id”

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- DIY: Use an xlookup to match signalvine_id to customer_id



A screenshot of Microsoft Excel showing a formula being entered into cell C2. The formula is =xlookup(B2, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$I:\$I, '[Implementation Alumni Relations.csv]Implementation Alumni Relations'!\$T:\$T). The formula is partially typed in the formula bar. The table has three columns: A (customer_id), B (phone), and C (signalvine_id). Row 1 contains the column headers. Rows 2, 3, and 4 contain data: 10000, 10001, and 10002 in column A; 15555551234, 15555551235, and 15555551250 in column B; and 15555551234, 15555551235, and 15555551250 in column C. A dropdown arrow is visible next to the formula in cell C2.

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



A screenshot of Microsoft Excel showing a table with four columns: customer_id, first_name, last_name, and sp24. The table has 10 rows, with the first row being the header. The data includes: 10000, Lila, Roberts; 10001, Kathryn, Caldwell; 10003, Sandy, Stevens; 10004, Pauline, Crawford; 10005, Maria, Vaughn; and 10006, Willie, Boyd.

	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	Boyd	
9				

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
...

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

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

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.

ERROR

Unrecognized variable: current_location

Unrecognized variable: career_field

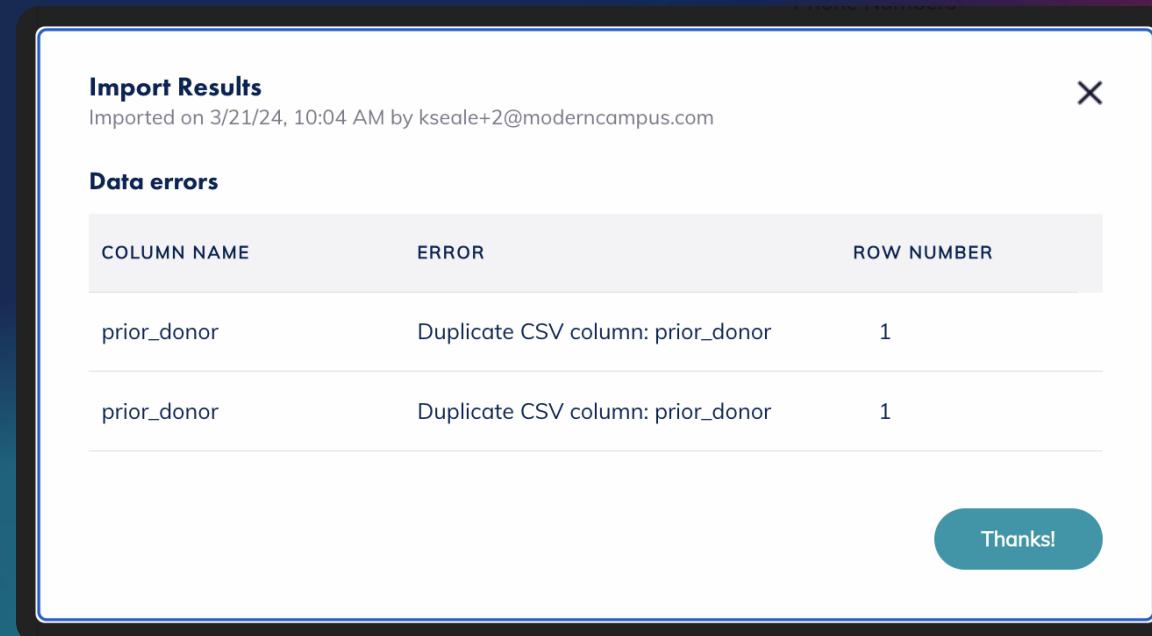
Unrecognized variable: prior_donor

Unrecognized variable:

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

☰	email	String
☰	previous_donor	String
☰	staff_name	String
☰	phone_valid	Boolean

Duplicate CSV column: Data File Upload Error



Duplicate CSV Column:

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:

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

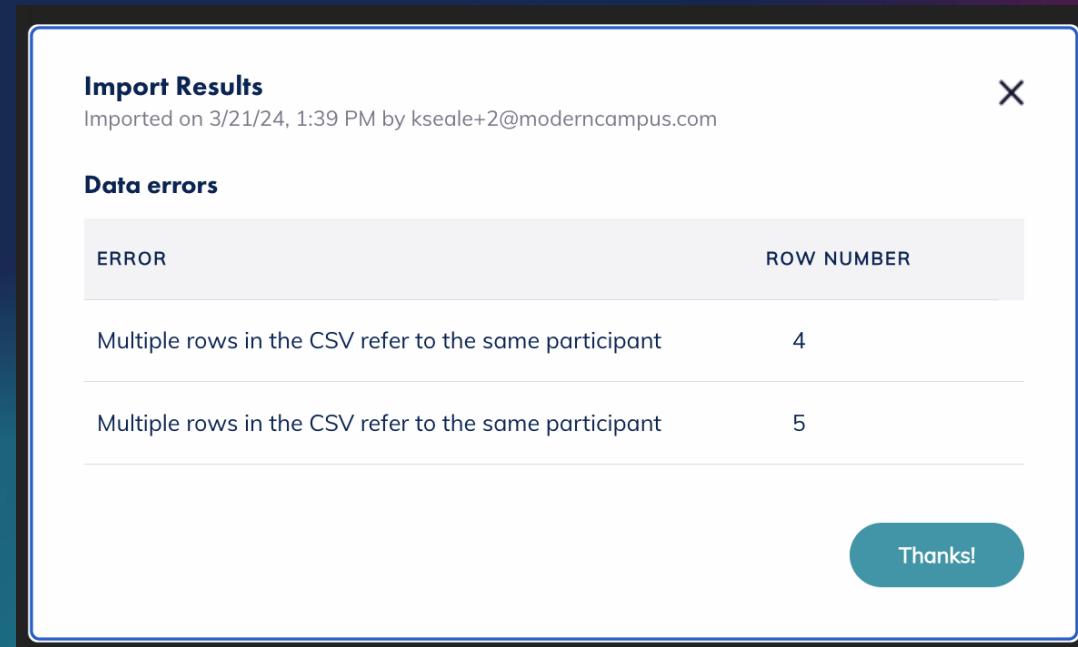
Data errors

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

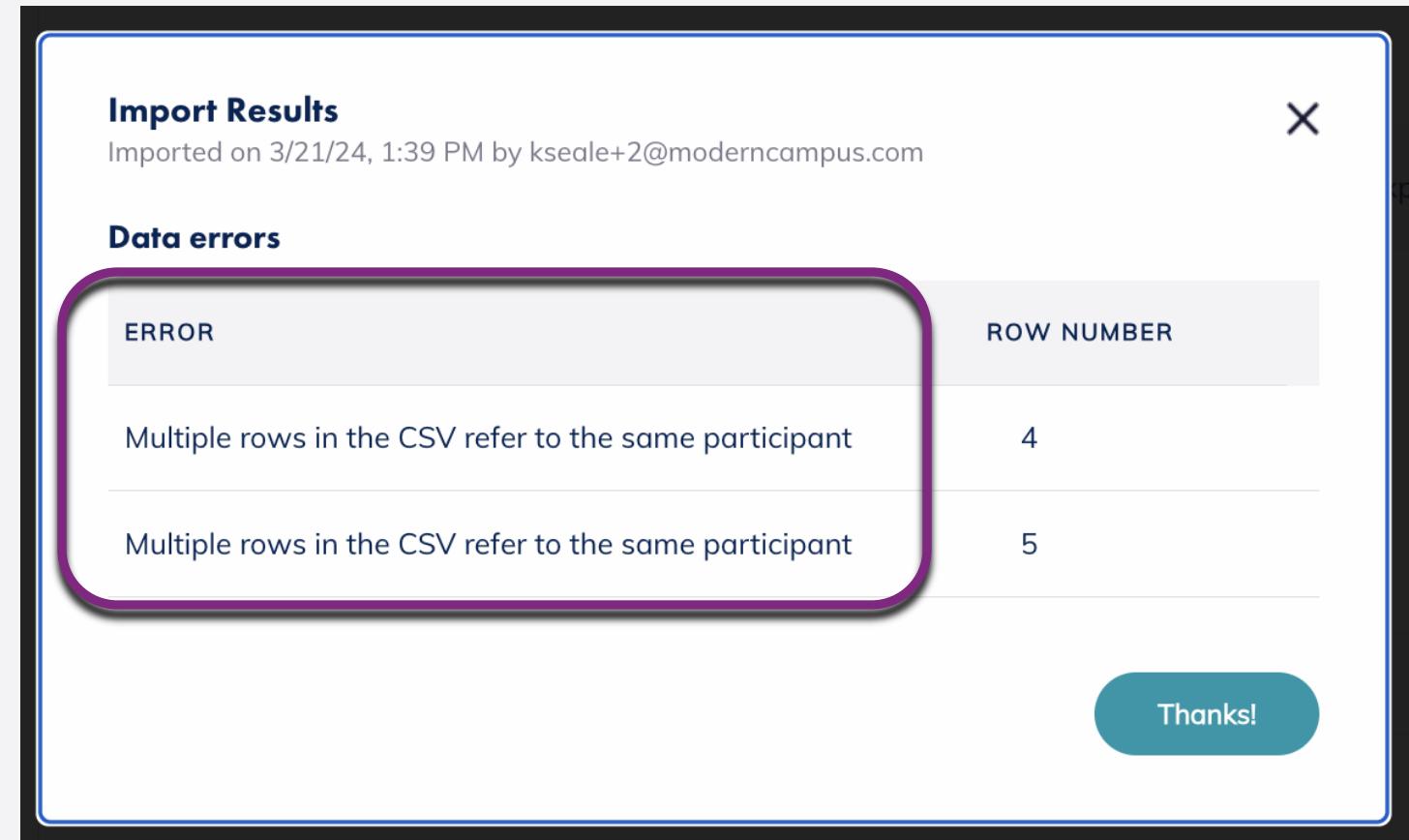
- Two contacts or rows have the same ID
- There are blank rows that are being recognized as contacts

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

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.

Thanks!

Demo Error Troubleshooting In App

- 1st upload correct file to the wrong program
- 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 into
the Zoom Q&A feature!

Thank You

See you next month!

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