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

Kelsey Seale

Wednesday, October 1, 2025

Manual Data Uploads

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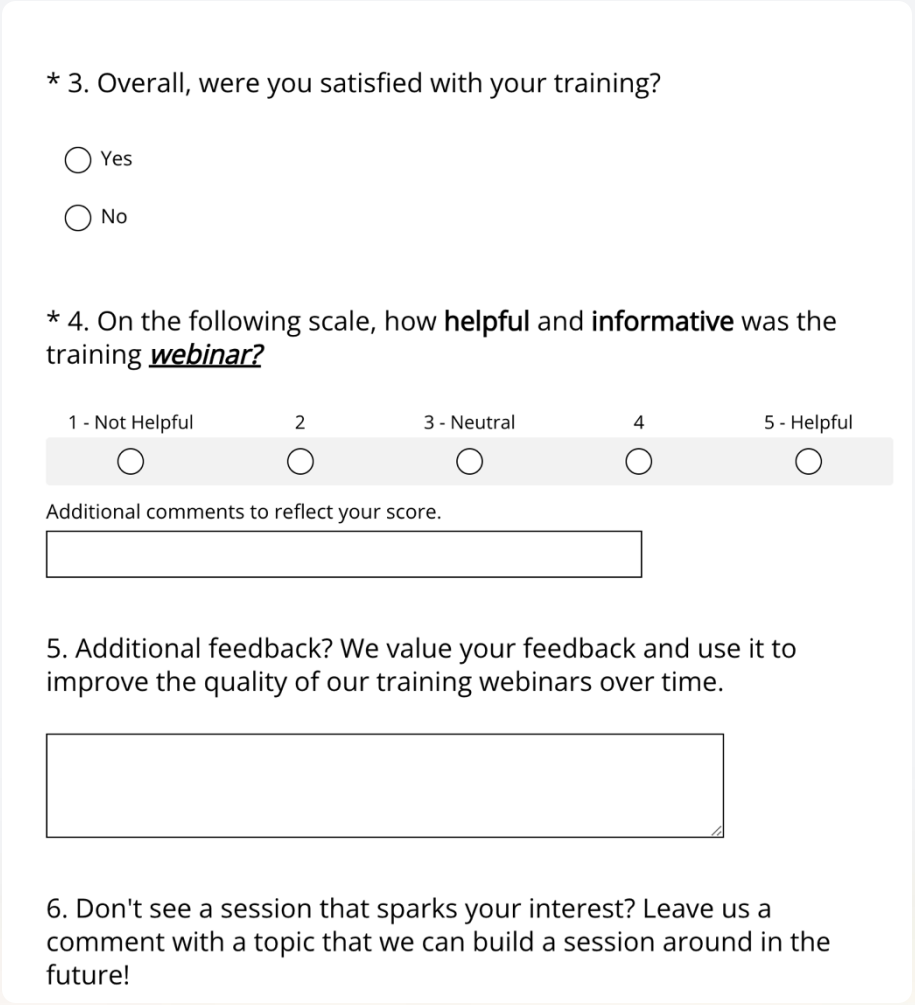
Post-Webinar Survey

- 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	
	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

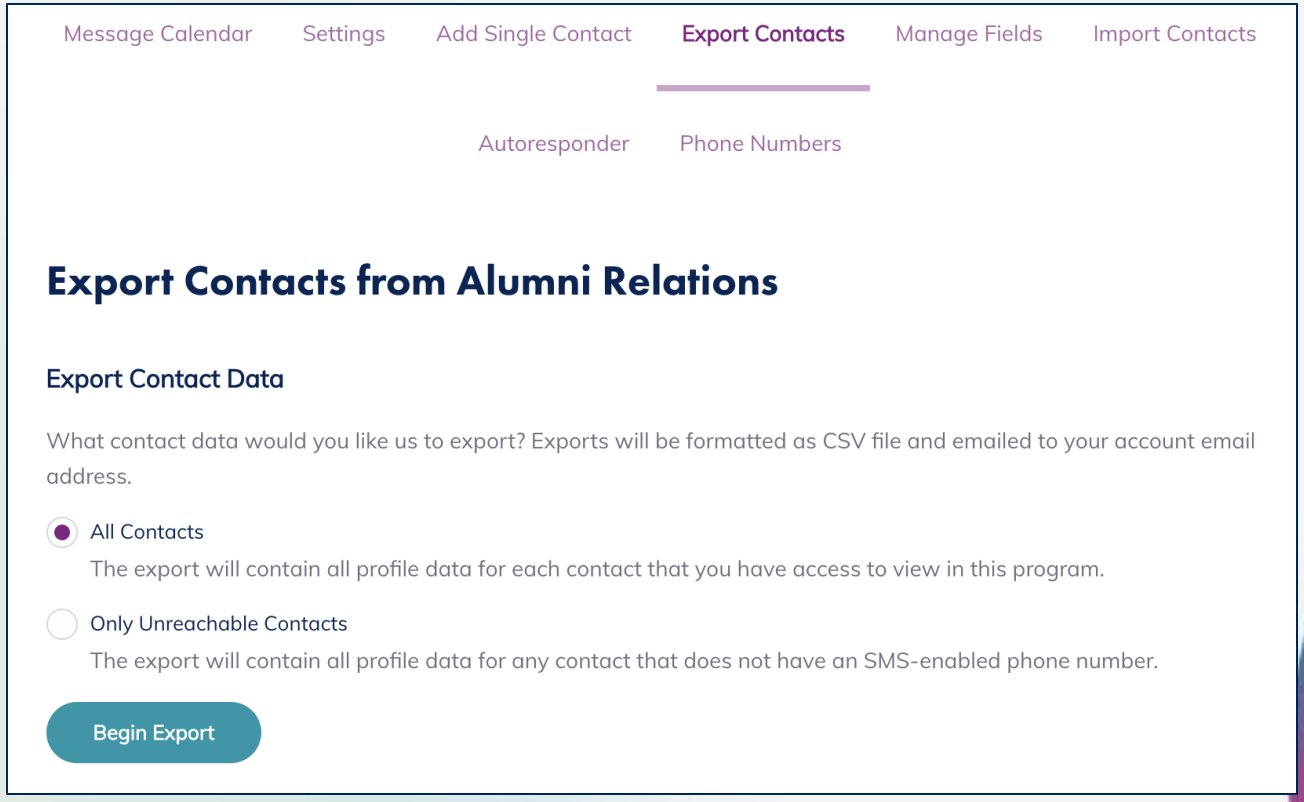
Where is my data file?

- 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 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

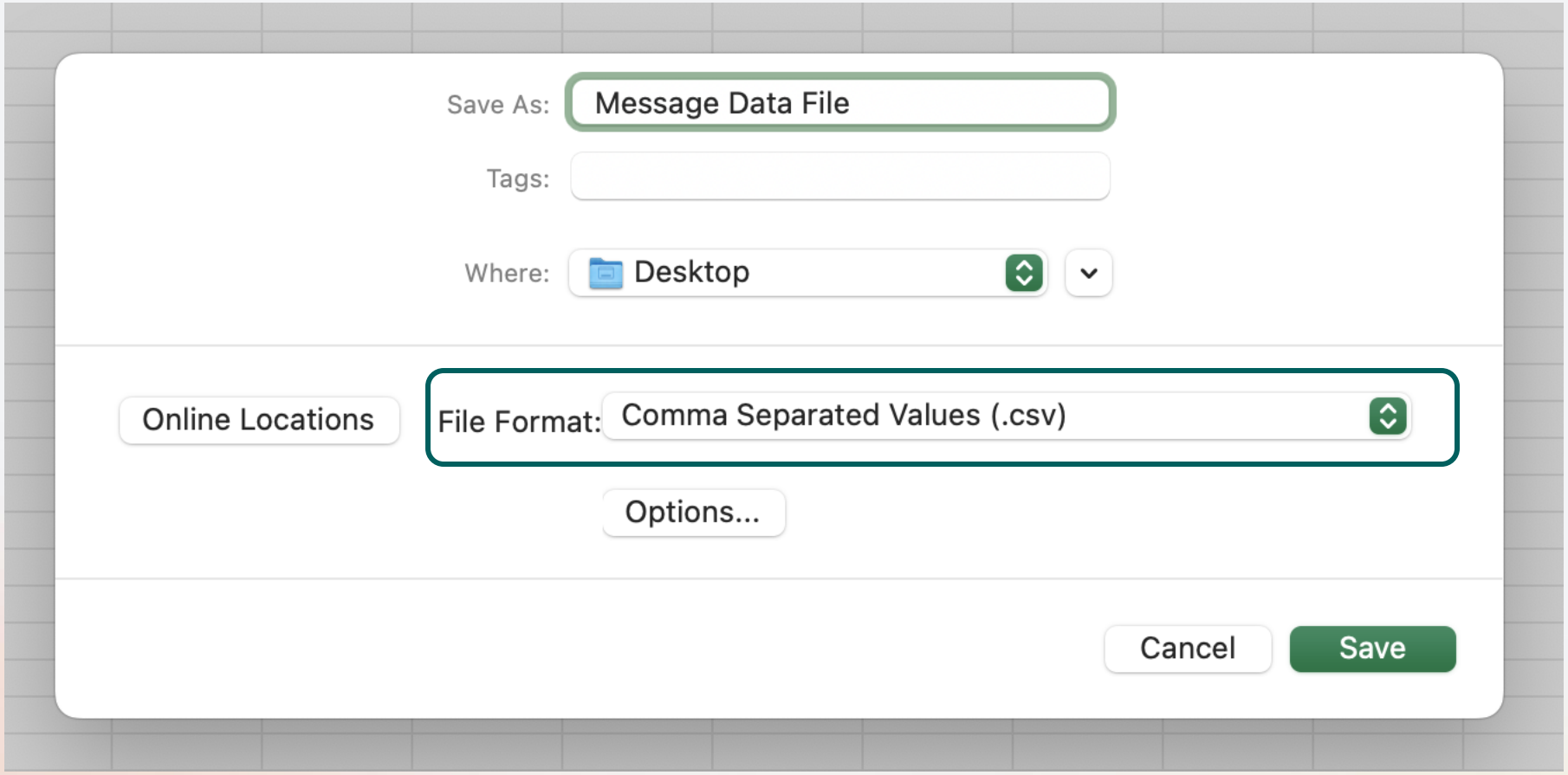
1. .CSV file
2. Column headers must be **all lower case, no spaces**
3. Column headers must **match your field name 100%**

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

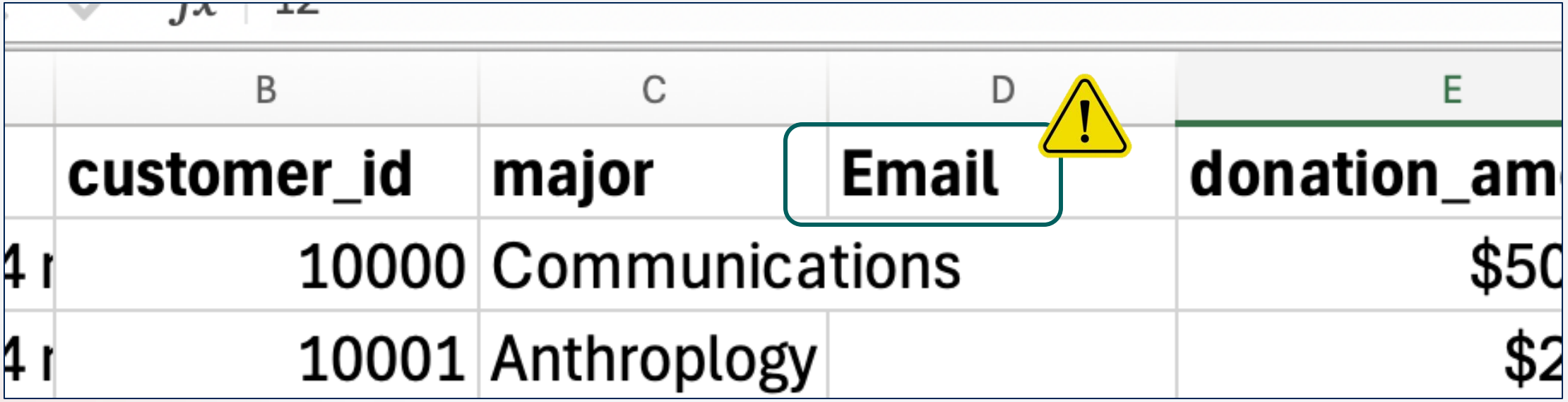
   Note: Custom fields cannot be edited once they're created
4. Type of data must **match the field type** exactly

   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

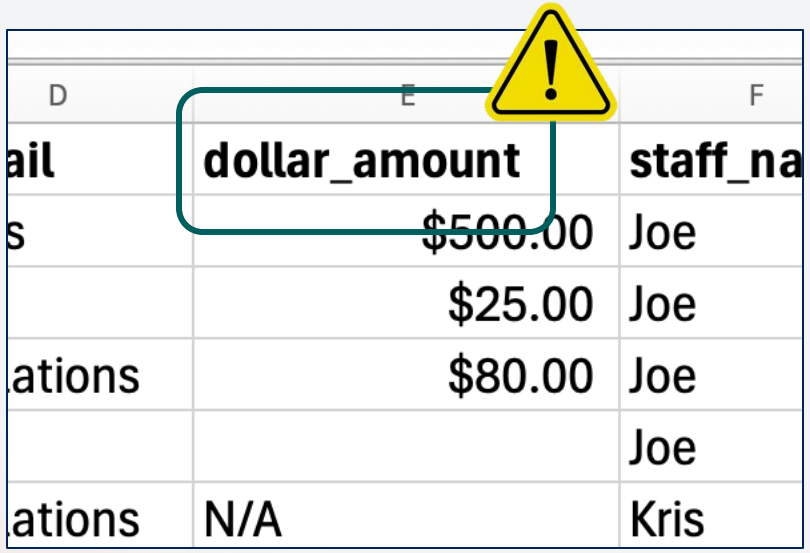

Save As:
Message Data File
Tags:
Where:
Desktop
Online Locations
File Format:
Comma Separated Values (.csv)
Options...
Cancel
Save

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

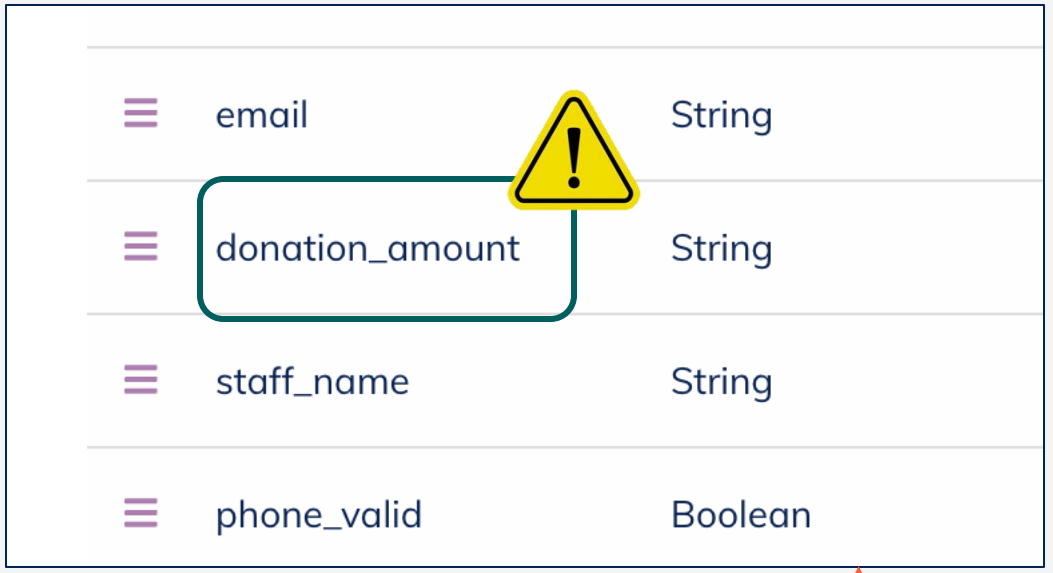


	B	C	D	E
	customer_id	major	Email	donation_am
4 r	10000	Communications		$50
4 r	10001	Anthroplogy		$2

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



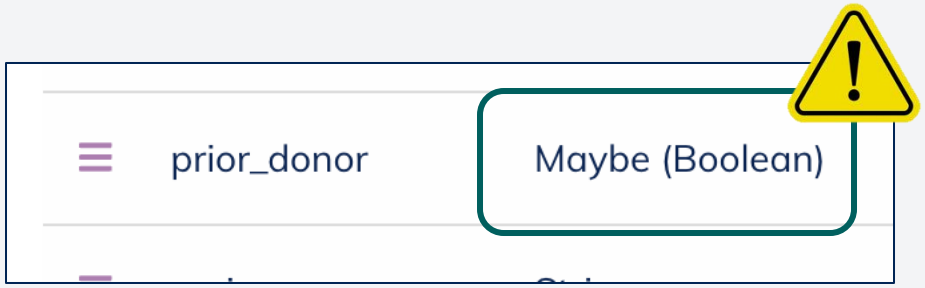
D	E	F
ail	dollar_amount	staff_na
s	$500.00	Joe
	$25.00	Joe
ations	$80.00	Joe
		Joe
ations	N/A	Kris

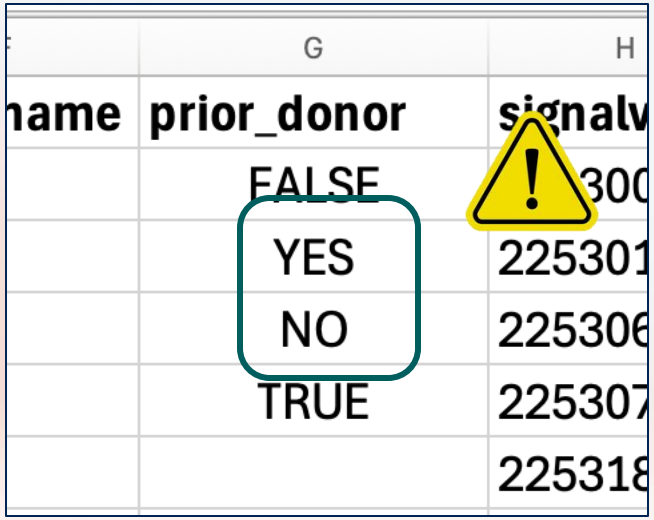


Check this under → **Program Tab; → Custom Fields**

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

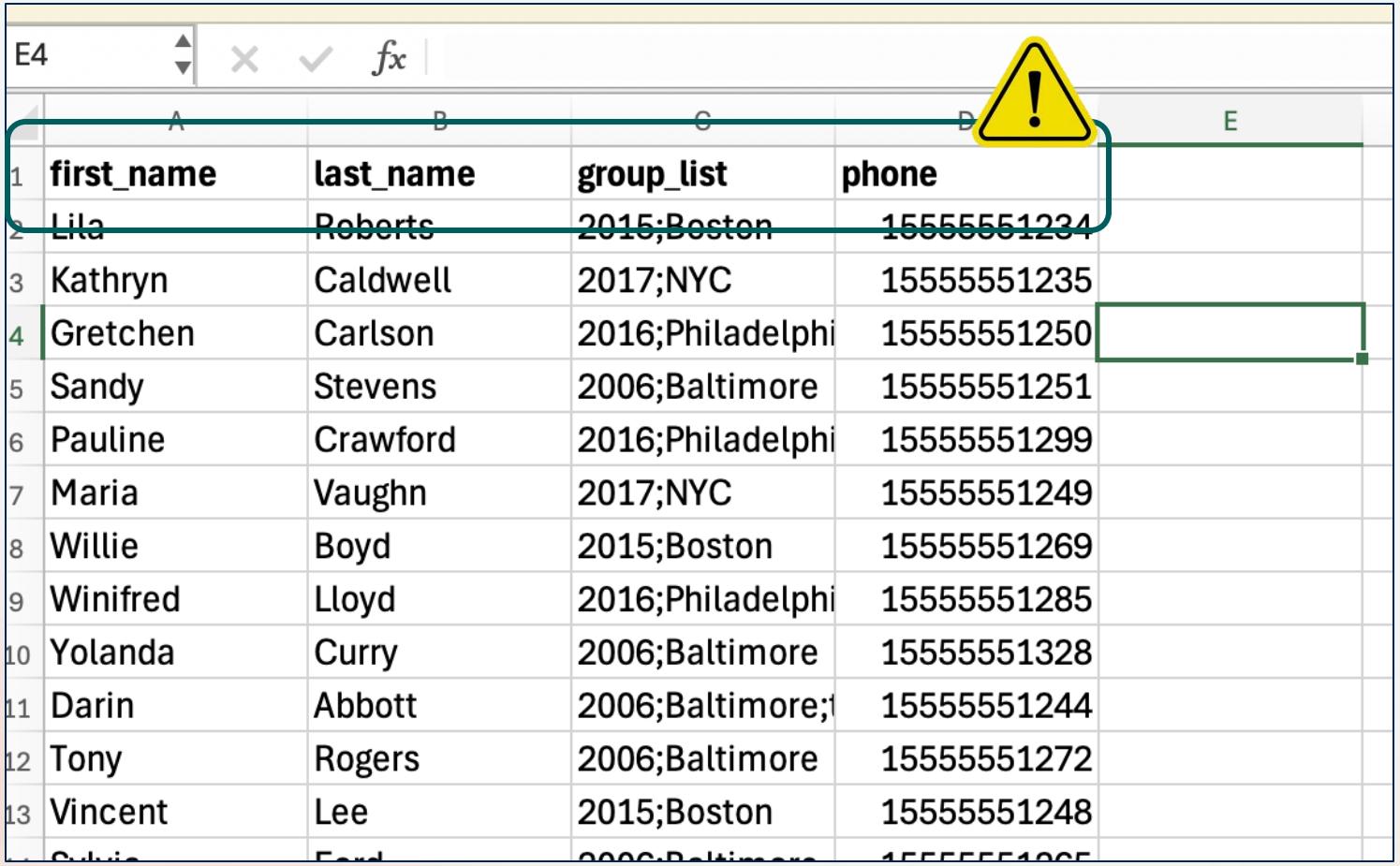
Type of data must **match the field type** exactly





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

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

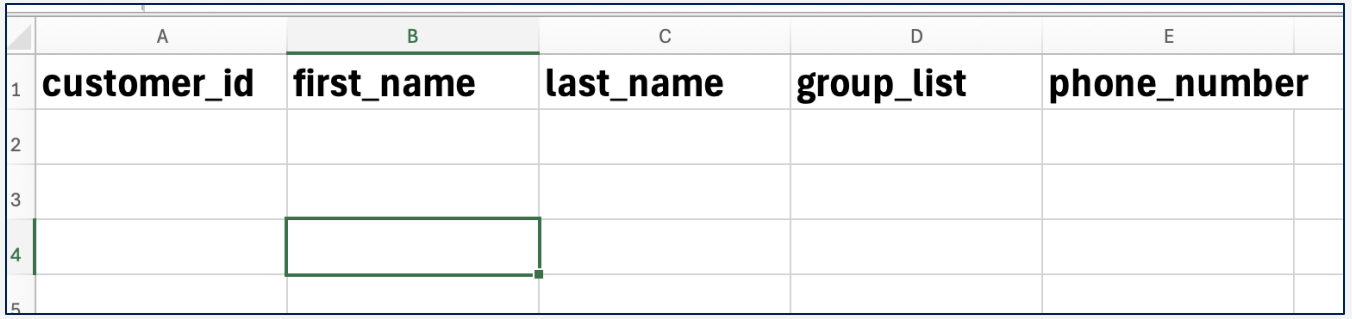


E4

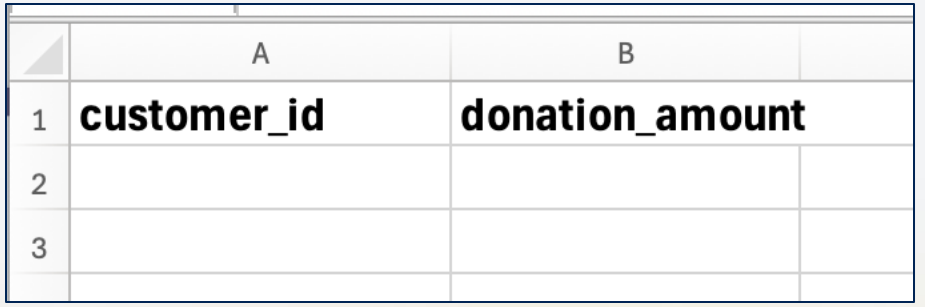
	A	B	C	D	E
1	**first_name**	**last_name**	**group_list**	**phone**	
2	~~Lila~~	~~Roberts~~	~~2015;Boston~~	~~15555551234~~	
3	Kathryn	Caldwell	2017;NYC	15555551235	
4	Gretchen	Carlson	2016;Philadelphi	15555551250	
5	Sandy	Stevens	2006;Baltimore	15555551251	
6	Pauline	Crawford	2016;Philadelphi	15555551299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

Create Your File

- **Import New Contacts: Required Fields**
  - customer_id – HIGHLY RECOMMENDED
  - first_name
  - last_name
  - group_list
  - phone_number
- **Update existing contacts**
  - customer_id or signalvine_id
  - The field you want to update!



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



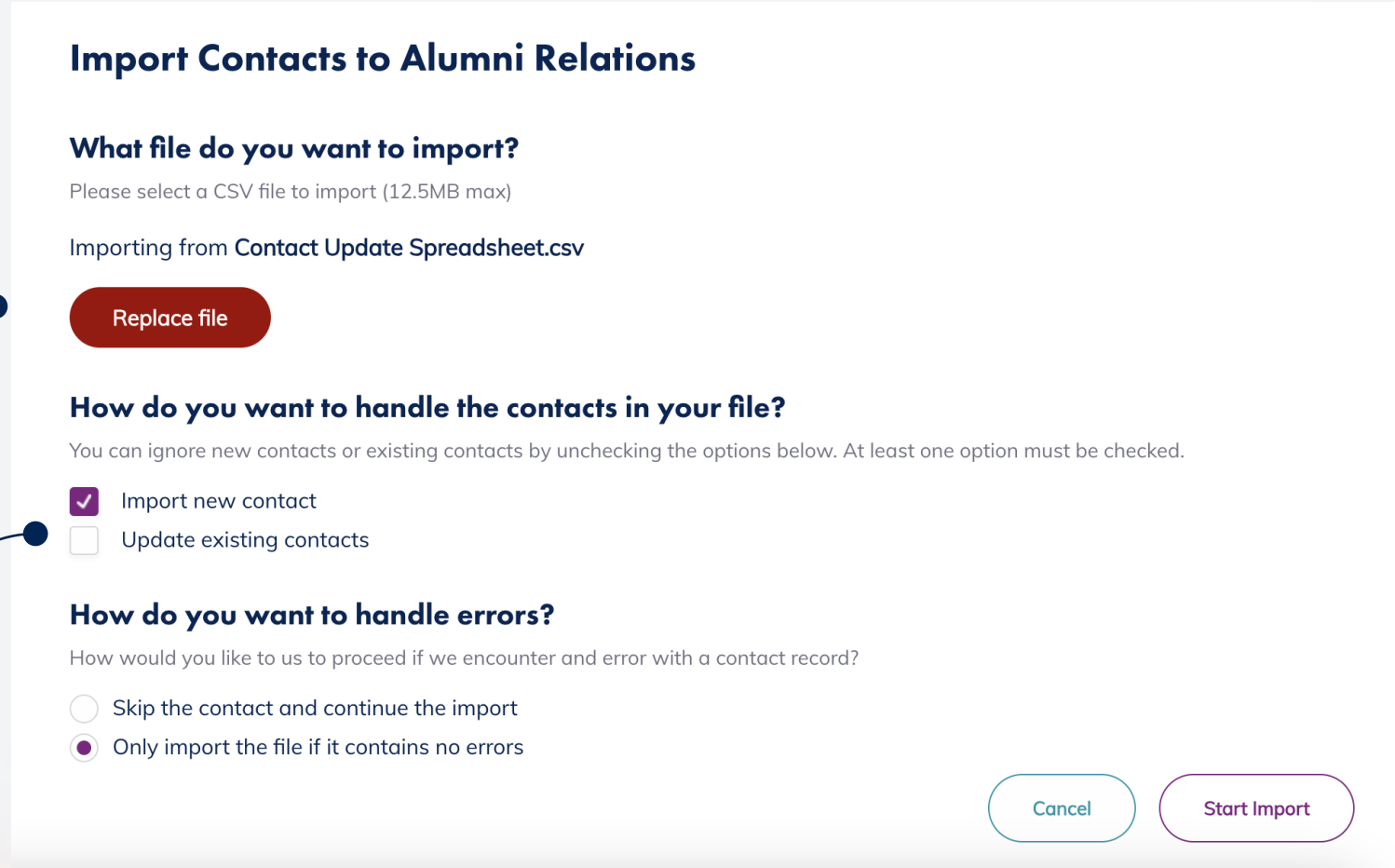
	A	B
1	customer_id	donation_amount
2		
3		

Data File Upload Options

Import Contacts Page

Select your data file

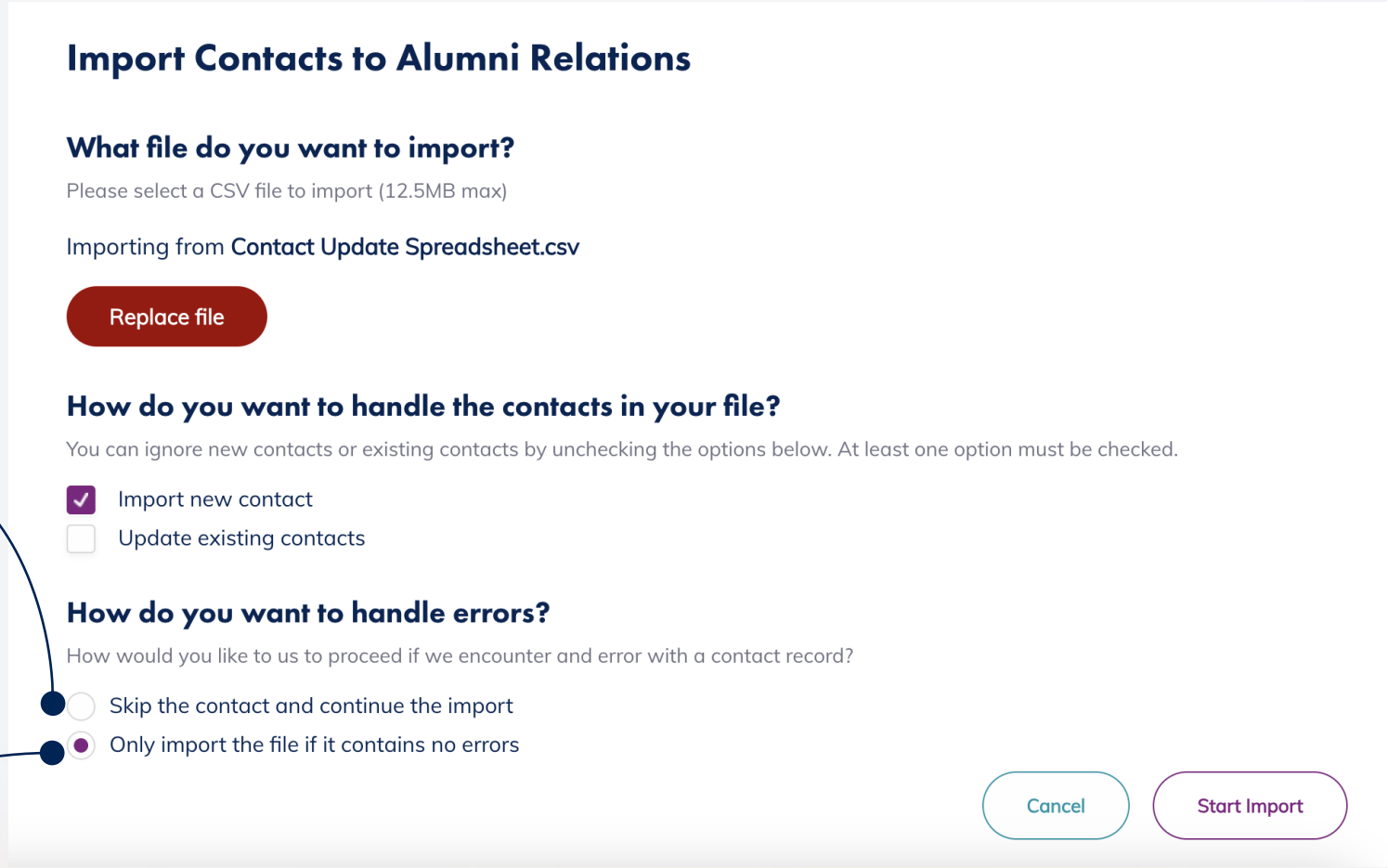
Options 1: Import new contacts
Option 2: Update existing contacts



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.



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

- [x] 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

- ○ 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

Why aren’t my contacts updating?

Import Contacts to Admissions 2025

Import Contacts

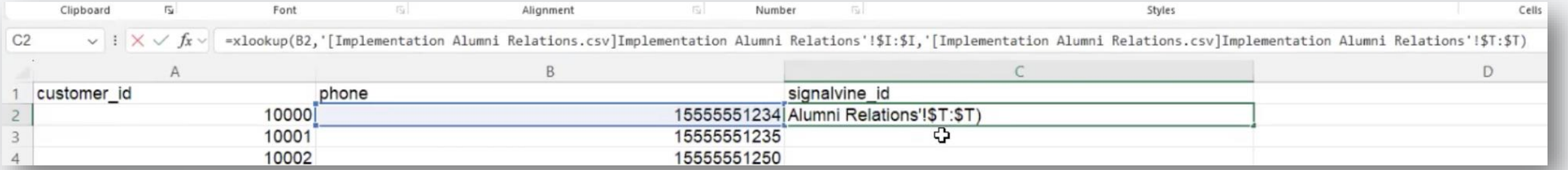
1 - 25 of 3

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	

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	B	C
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

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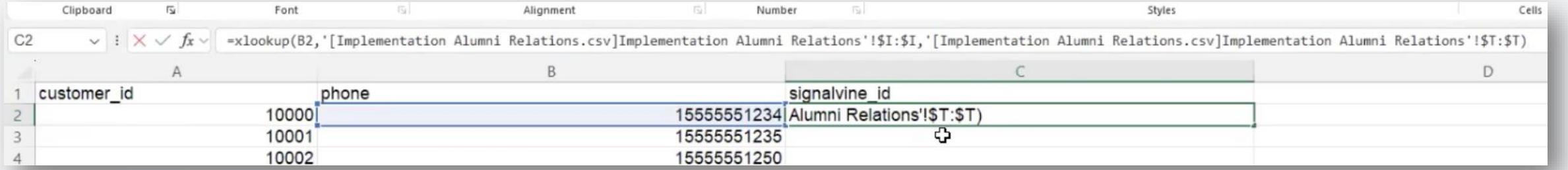


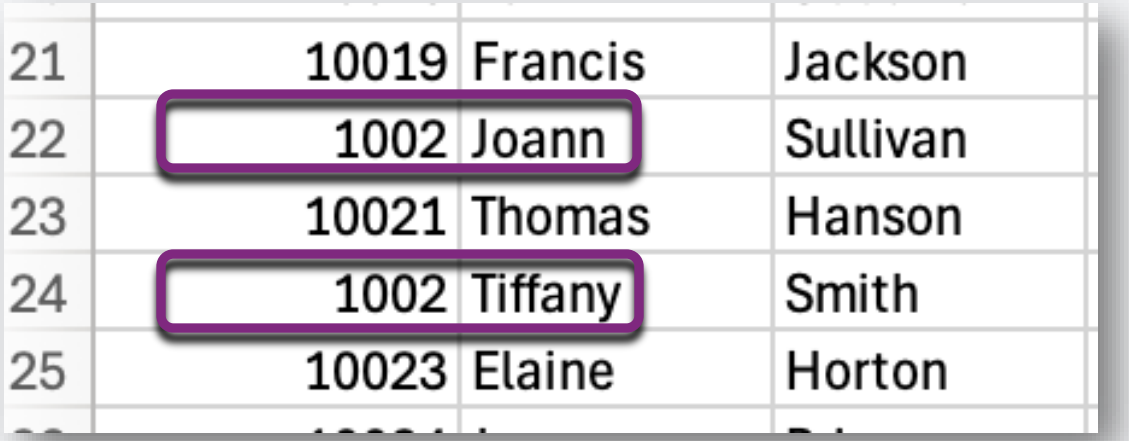
	A	B	C	
1	**customer_id**	**first_name**	**last_name**	sp24
2	10000	Lila	Roberts	
3	10001	Kathryn	Caldwell	
4		Gretchen	Carlson	
5	10003	Sandy	Stevens	
6	10004	Pauline	Crawford	
7	10005	Maria	Vaughn	

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
8/6/24 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...

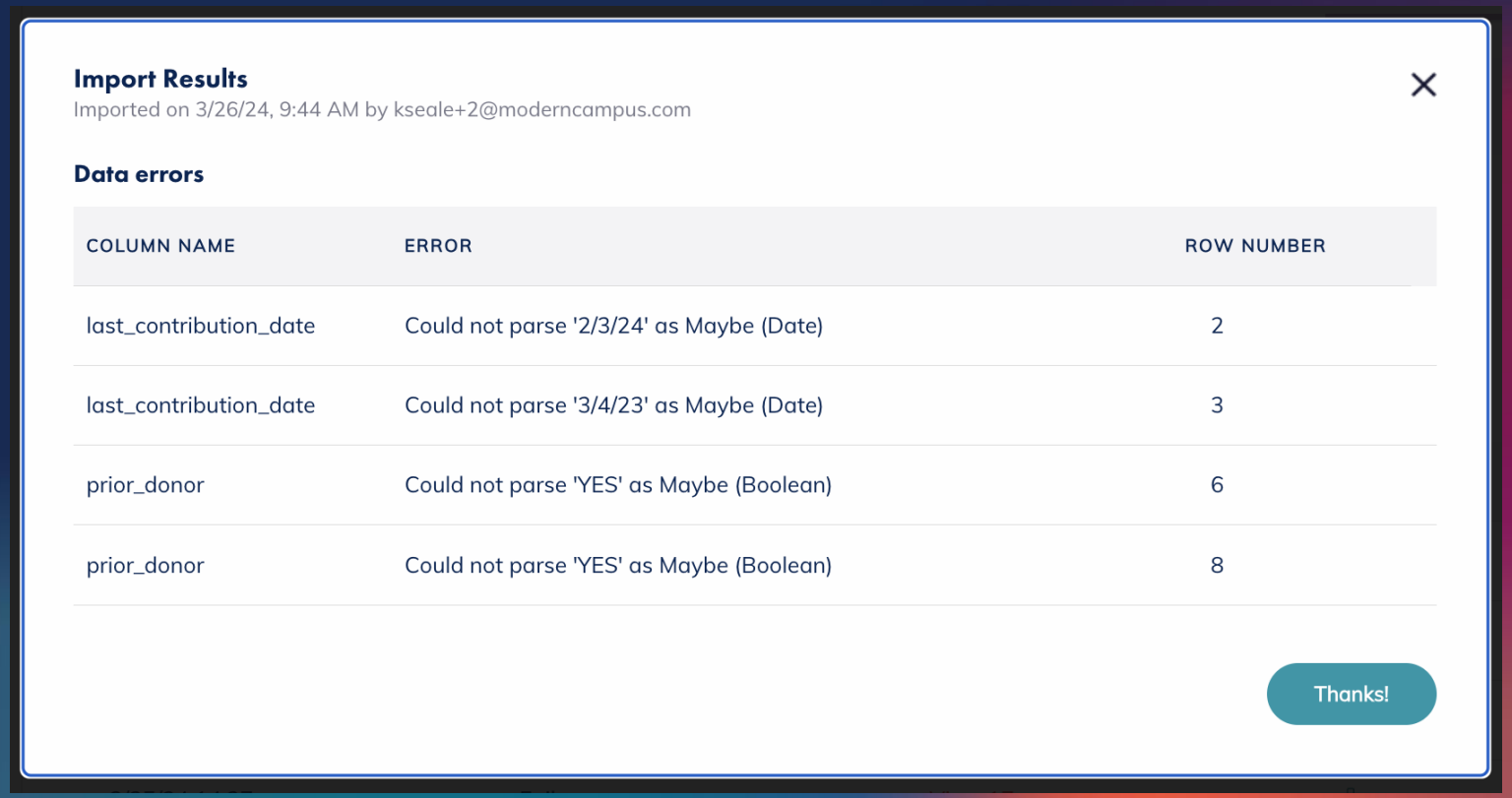
How do you want to handle errors?

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

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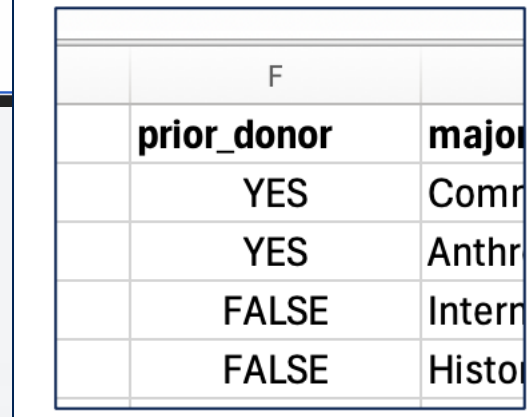
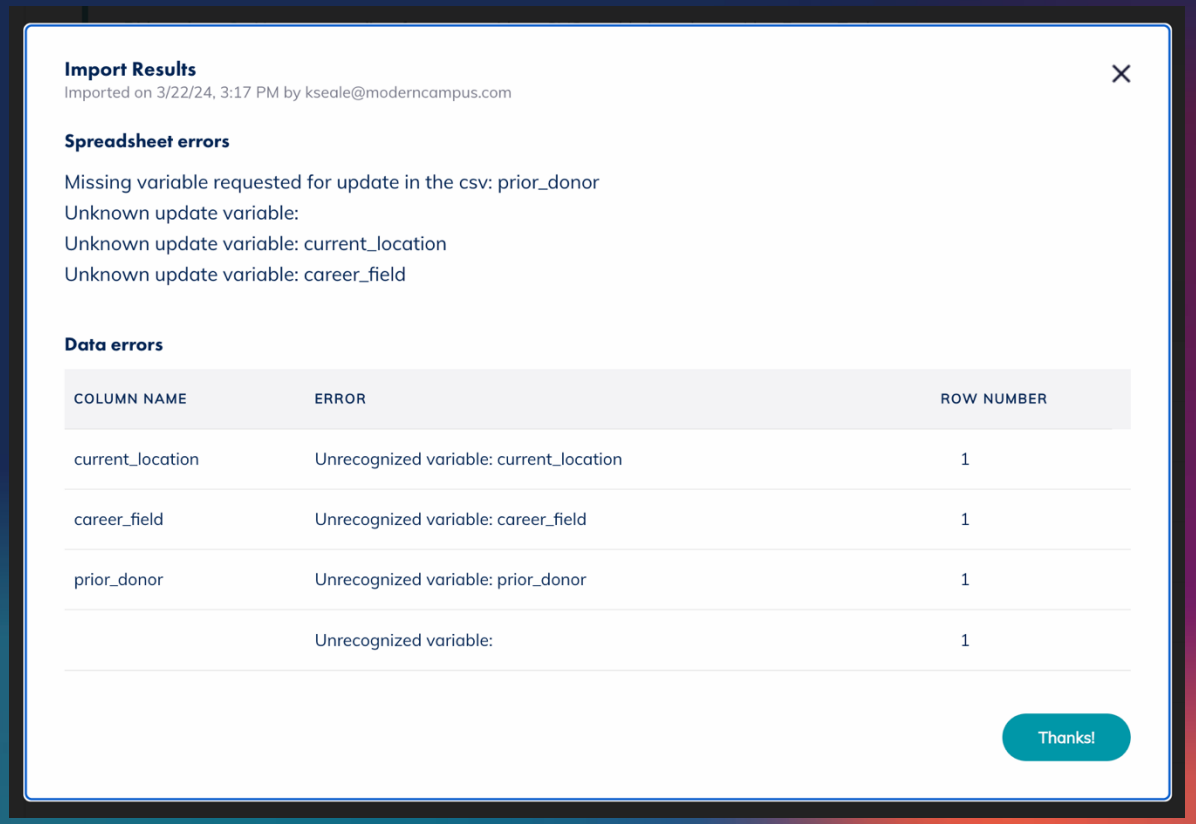
COLUMN NAME	ERROR	ROW NUMBER
last_contribution_date	Could not parse '2/3/24' as Maybe (Date)	2
last_contribution_date	Could not parse '3/4/23' as Maybe (Date)	3
prior_donor	Could not parse 'YES' as Maybe (Boolean)	6
prior_donor	Could not parse 'YES' as Maybe (Boolean)	8



	F	
	prior_donor	major
	YES	Comm
	YES	Anthr
	FALSE	Intern
	FALSE	Histo

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

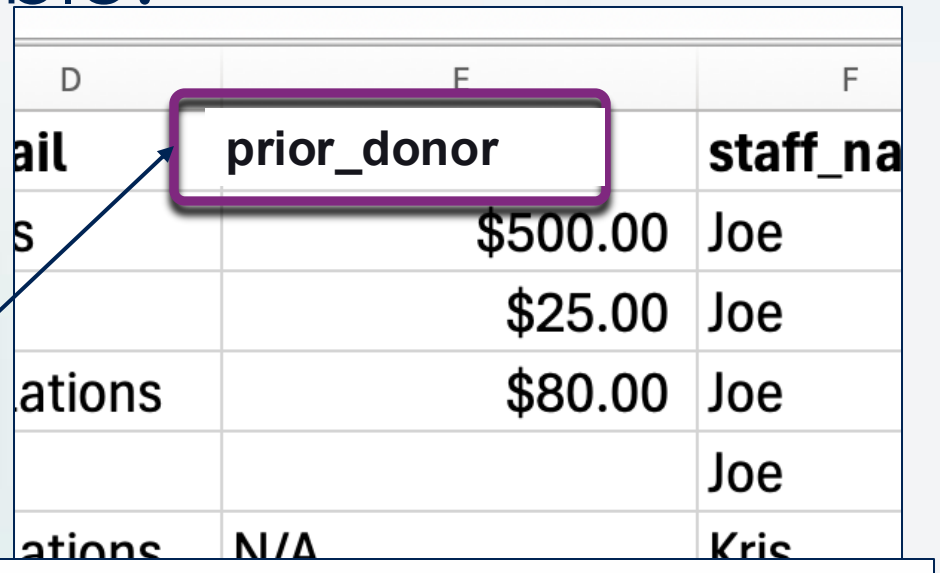
COLUMN NAME	ERROR	ROW NUMBER
current_location	Unrecognized variable: current_location	1
career_field	Unrecognized variable: career_field	1
prior_donor	Unrecognized variable: prior_donor	1
	Unrecognized variable:	1

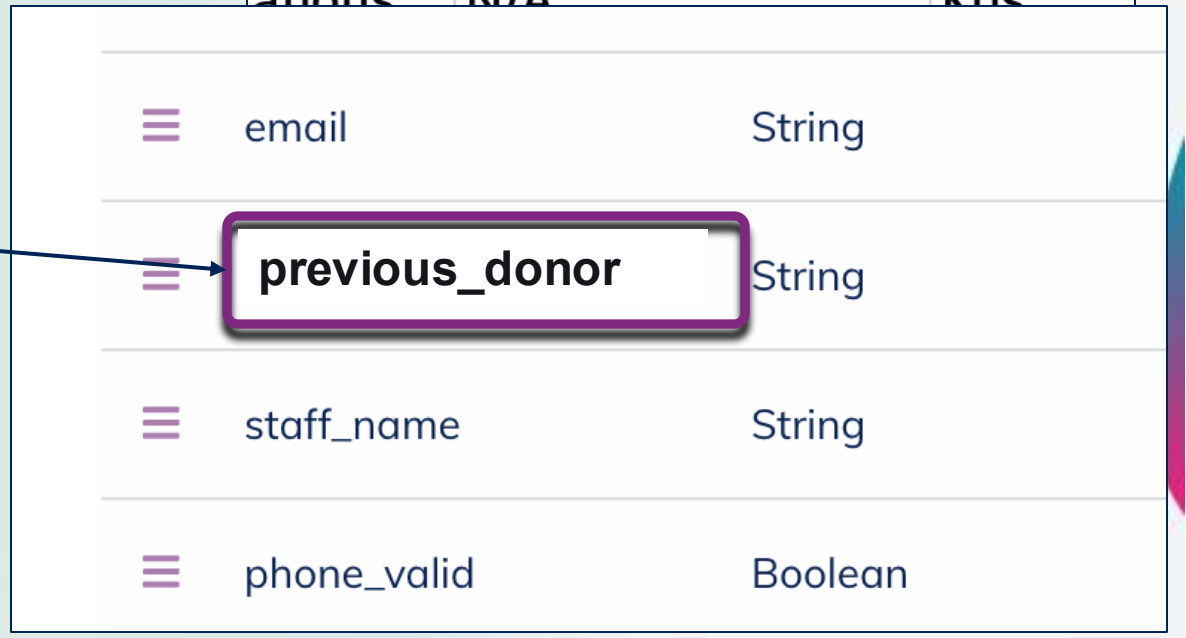
Thanks!

Unrecognized variable:

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

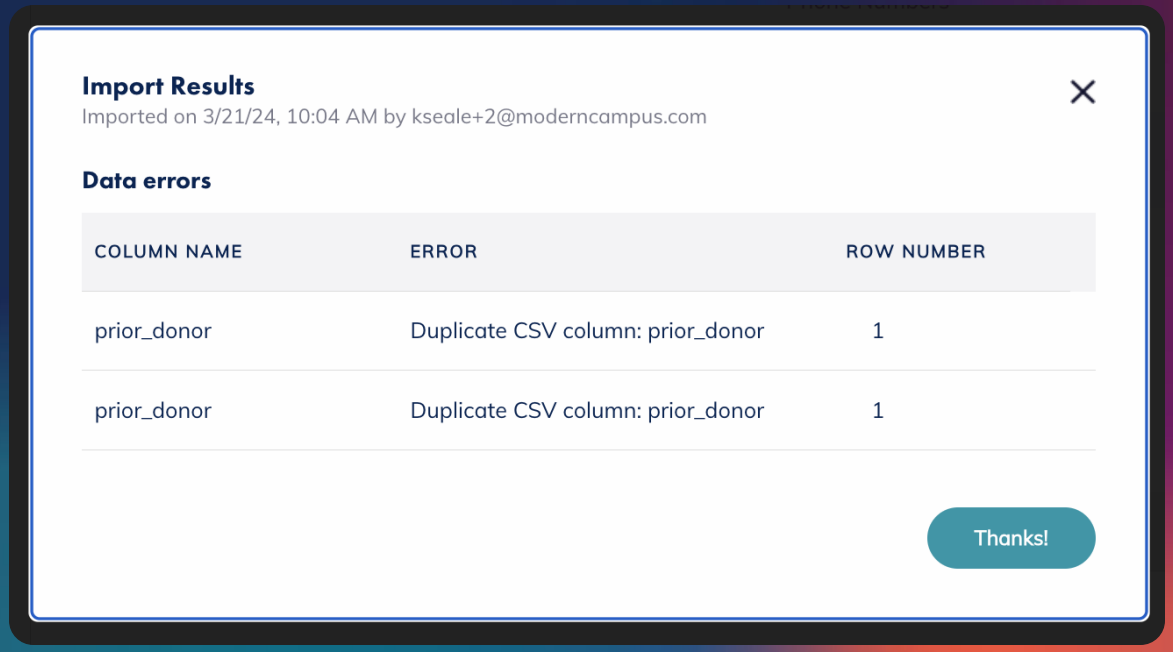
ERROR
Unrecognized variable: current_location
Unrecognized variable: career_field
Unrecognized variable: prior_donor
Unrecognized variable:





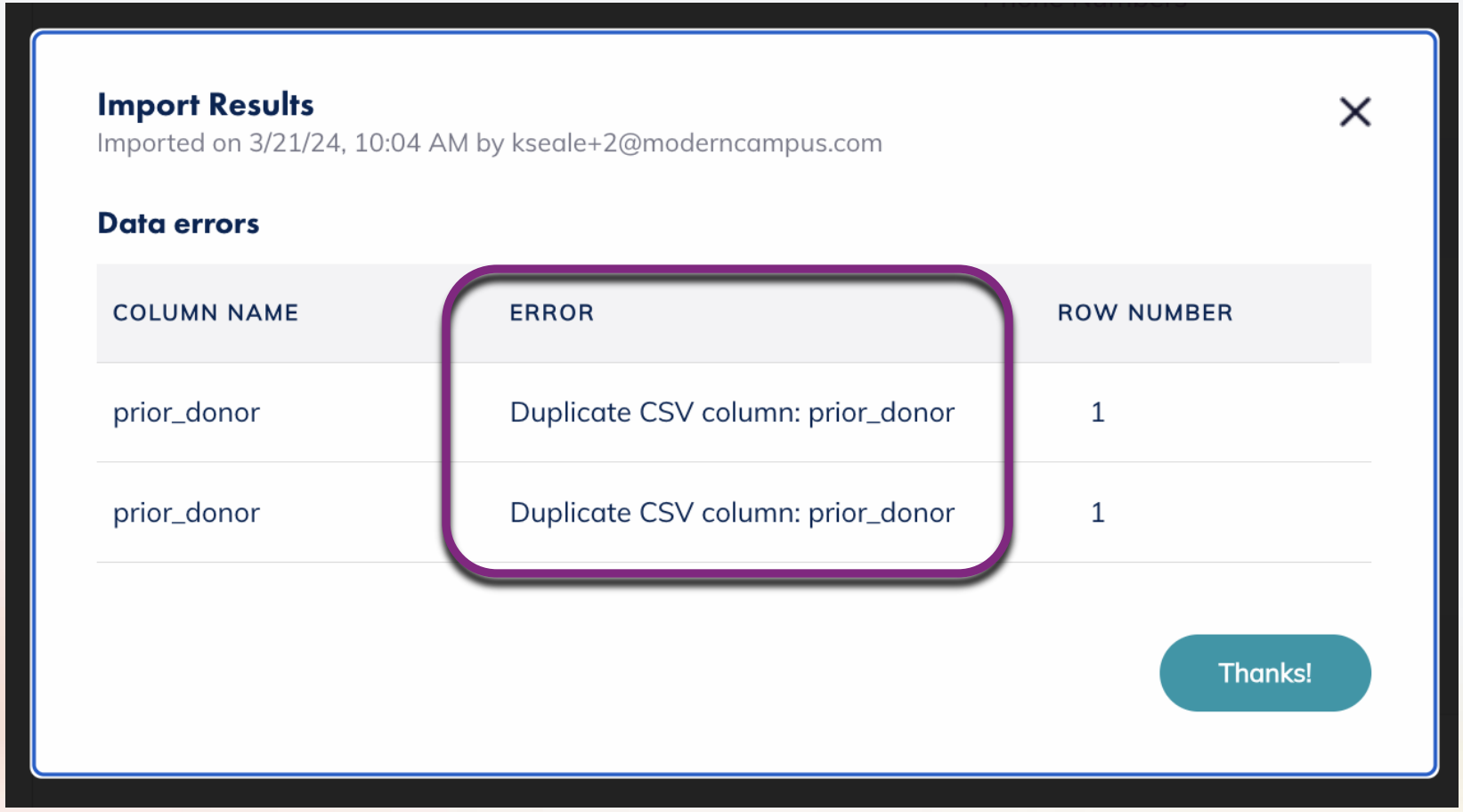
Duplicate CSV column:

Data File Upload Error



Two identical column headers

Duplicate CSV Column:



Import Results

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

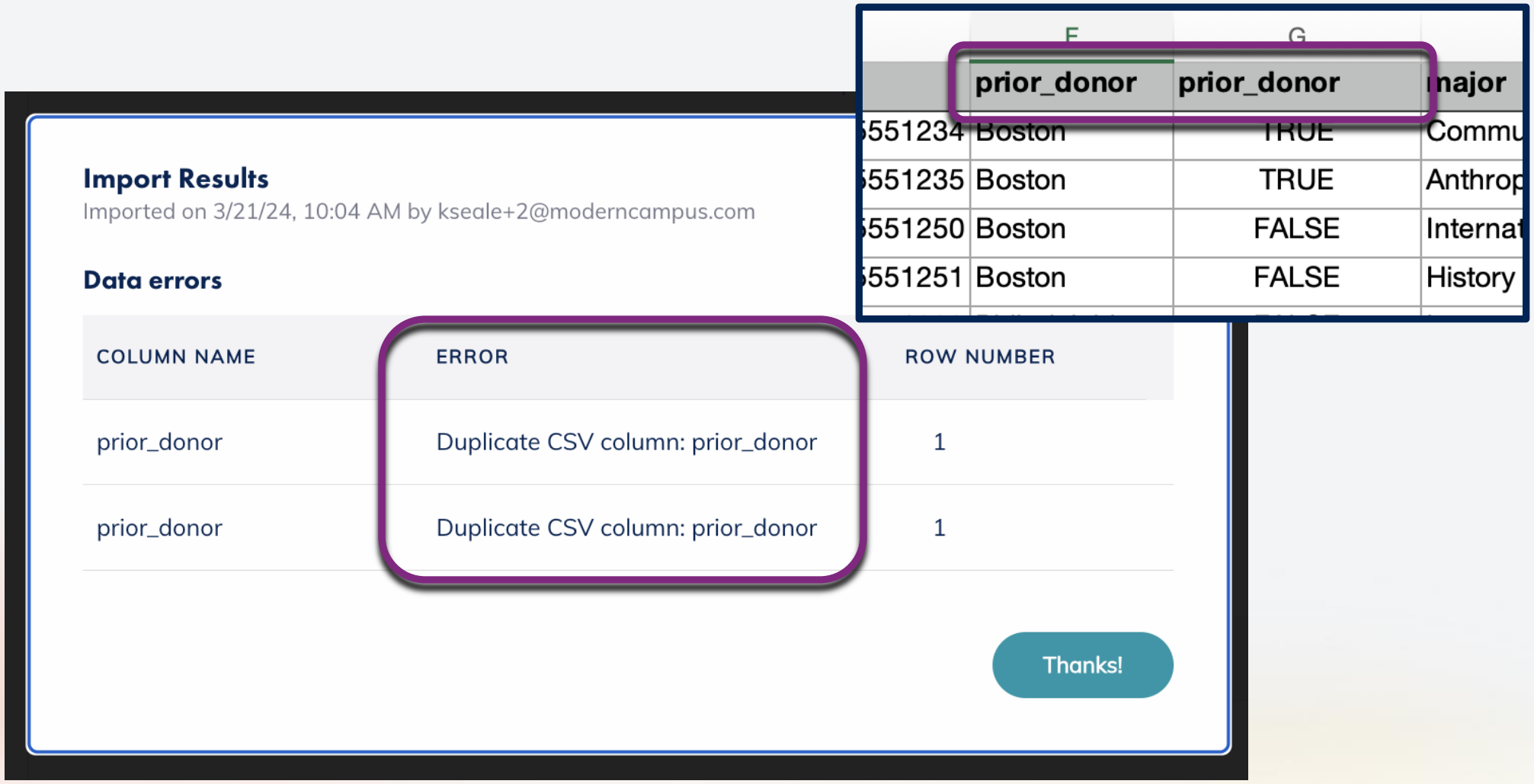
Data errors

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

Thanks!

Two identical column headers

Duplicate CSV Column:



	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

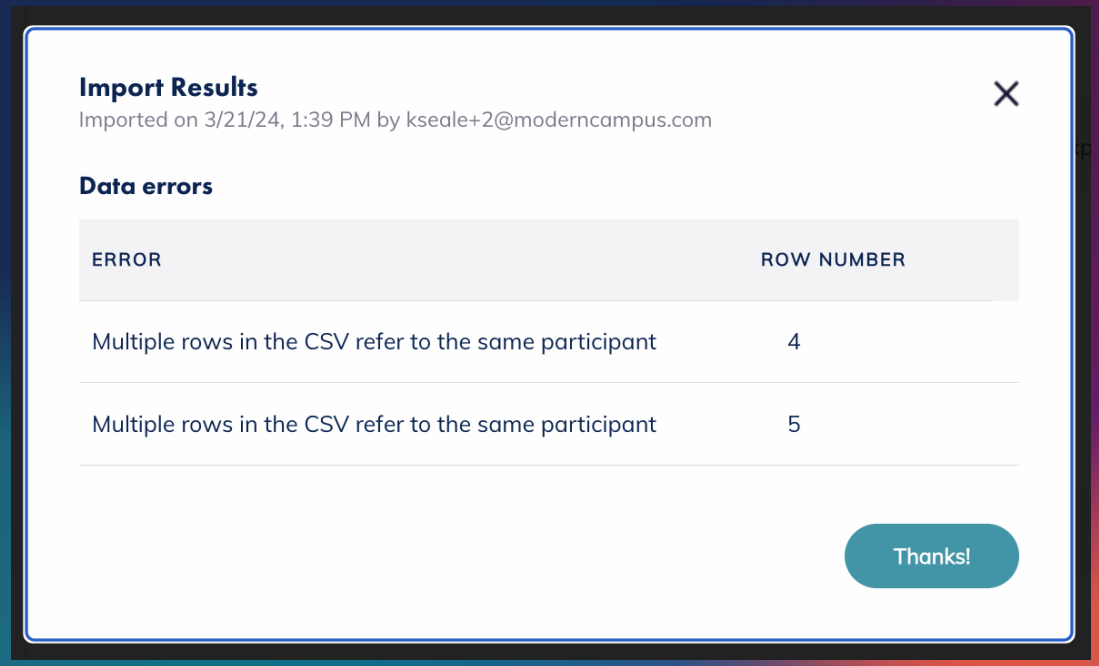
Data errors

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

Thanks!

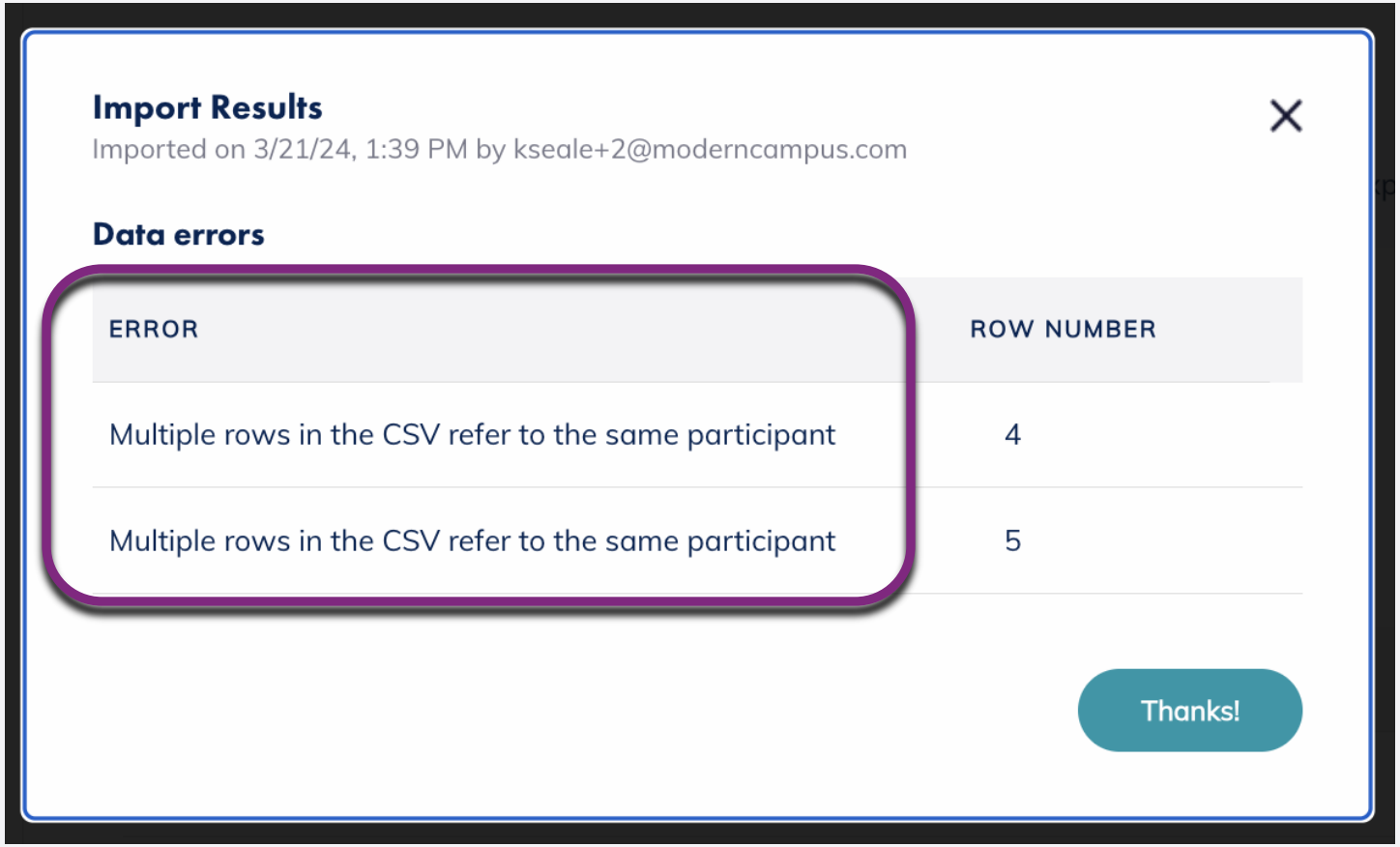
Multiple rows in the CSV refer to the same participant

Data File Upload Error



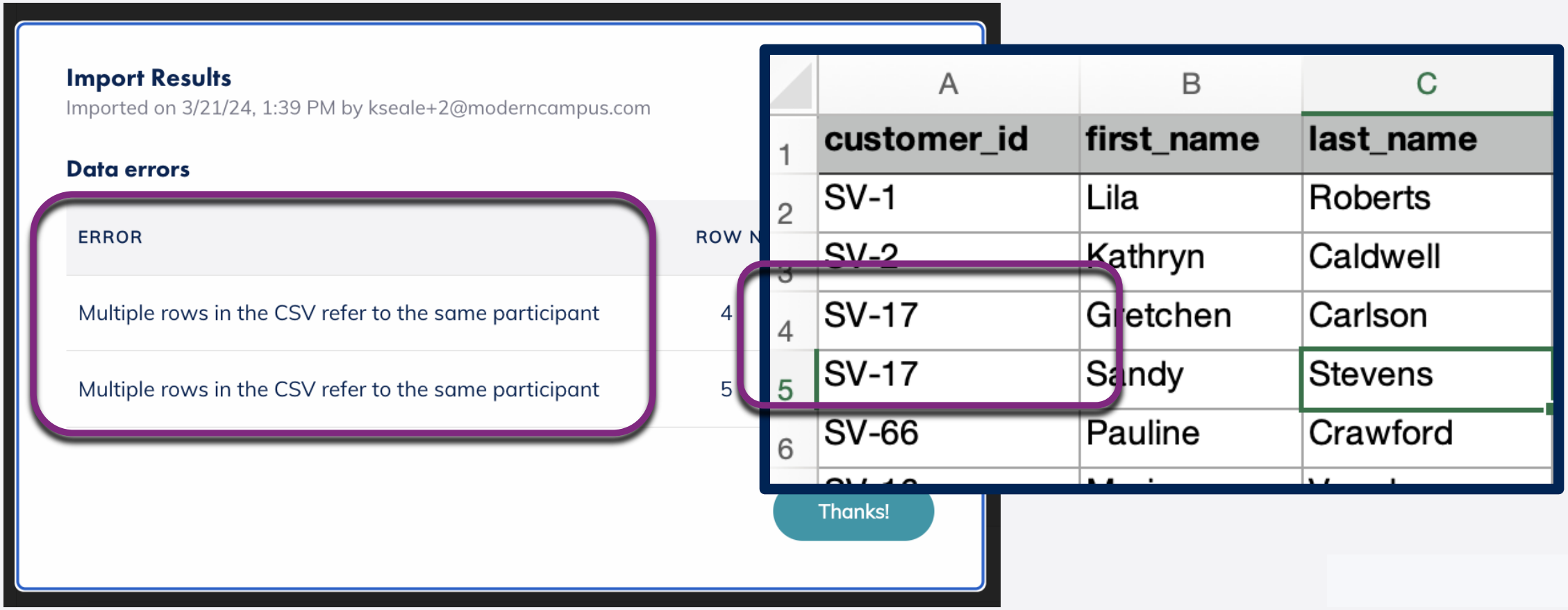
Multiple rows in the CSV refer to the same participant

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



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

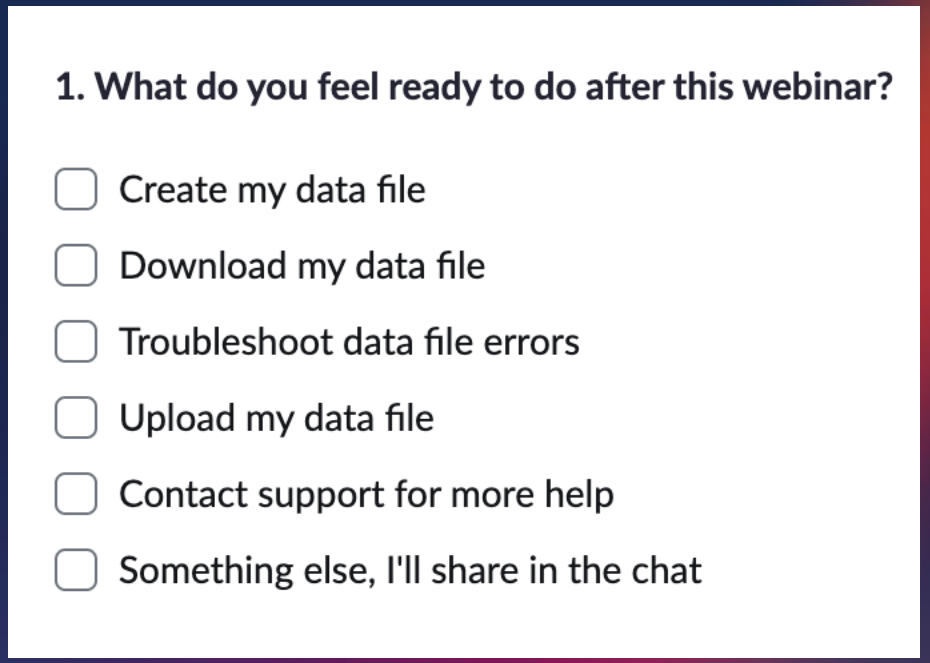


Demo Error Troubleshooting In App

- 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!



Q&A

Please put your questions into
the Zoom Q&A feature!

Thank You

See you next month!

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