

# Manually importing a list



Version	Author	Date
1.0	Jorin Mouwen	12-10-2023

## Introduction

Selligent Marketing Cloud is the official mail house of the Vrije Universiteit Amsterdam. In this manual you will find how to properly import your own list into Selligent.

If you have any questions in the meantime, please send an email to [mailing@vu.nl](mailto:mailing@vu.nl). The CRM Marketing Team will answer them as soon as possible.

## Access to Selligent Marketing Cloud

Click [here](#) to go to the Selligent inlog portal

Enter your credentials:

- Username
- Password

After successfully logging in, click on the module icon:



After this choose the option 'Campaign':

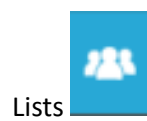


Campaign

The Campaign module will now be started.

## Navigating within Selligent Marketing Cloud

Once Campaign is opened, there are two options available:

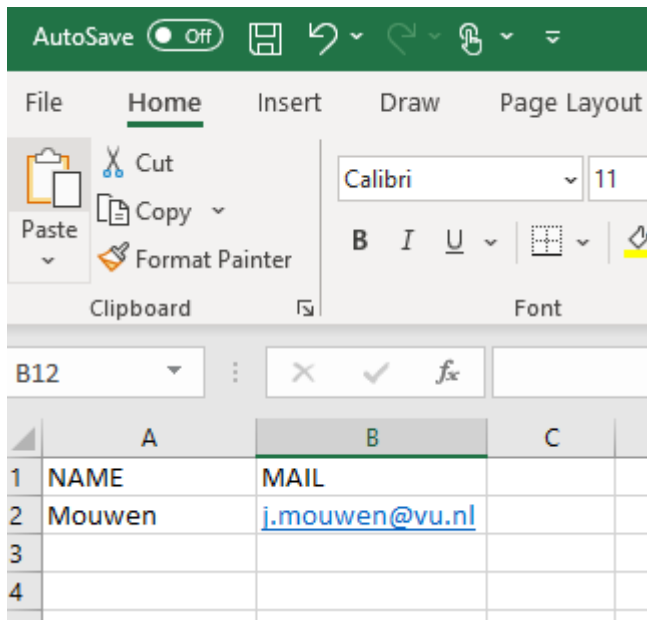


Navigate to 'Lists' to start importing a list.

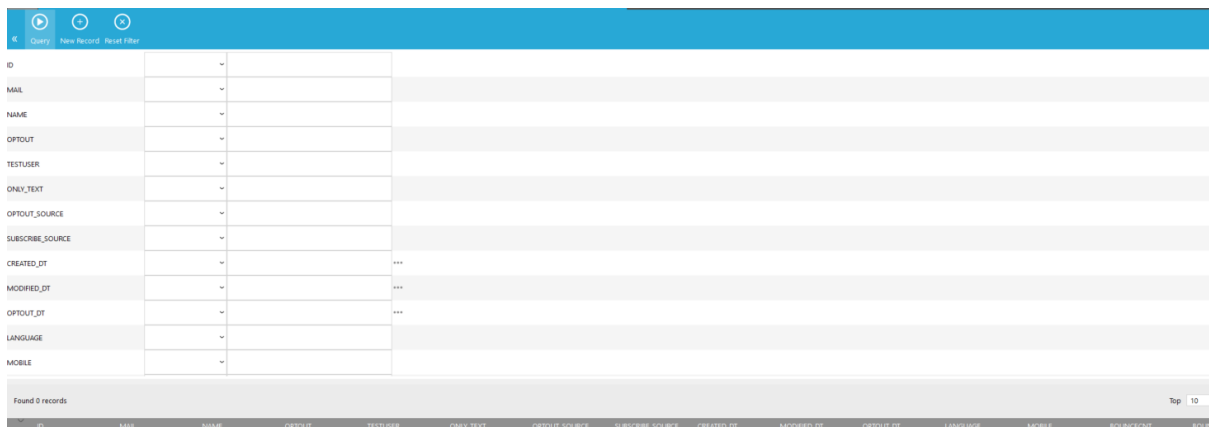
## Importing your own list

Before starting an import in Selligent, it is important to prepare the data properly.

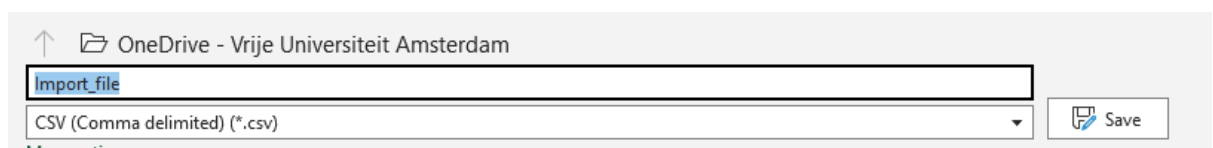
1. In an excel, put Selligent's column names above the fields you want to import. This way, when importing, Selligent immediately recognizes the field names after which they are concatenated.



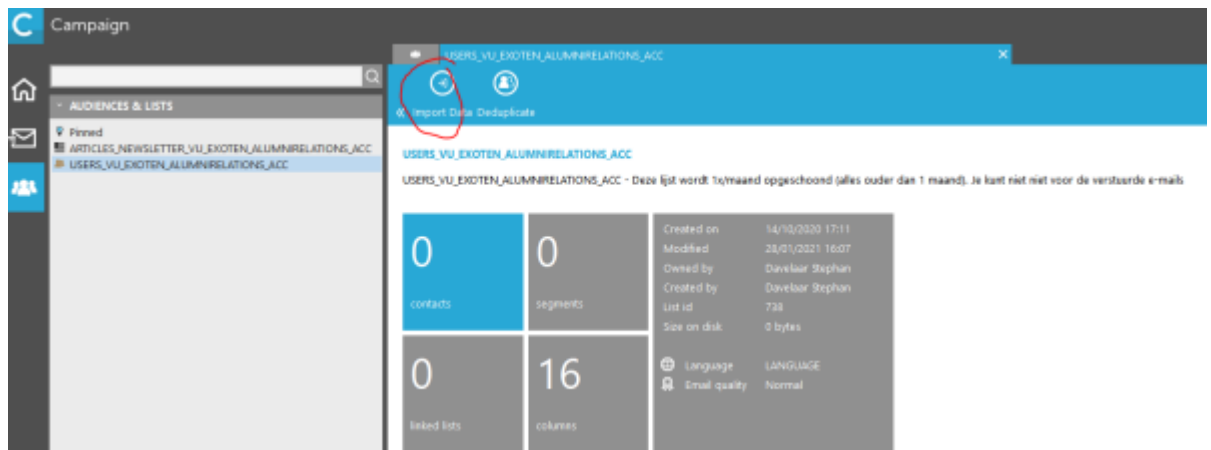
You can find the field names in Selligent if you go to 'Lists' and then open the list and click on 'Contacts'.



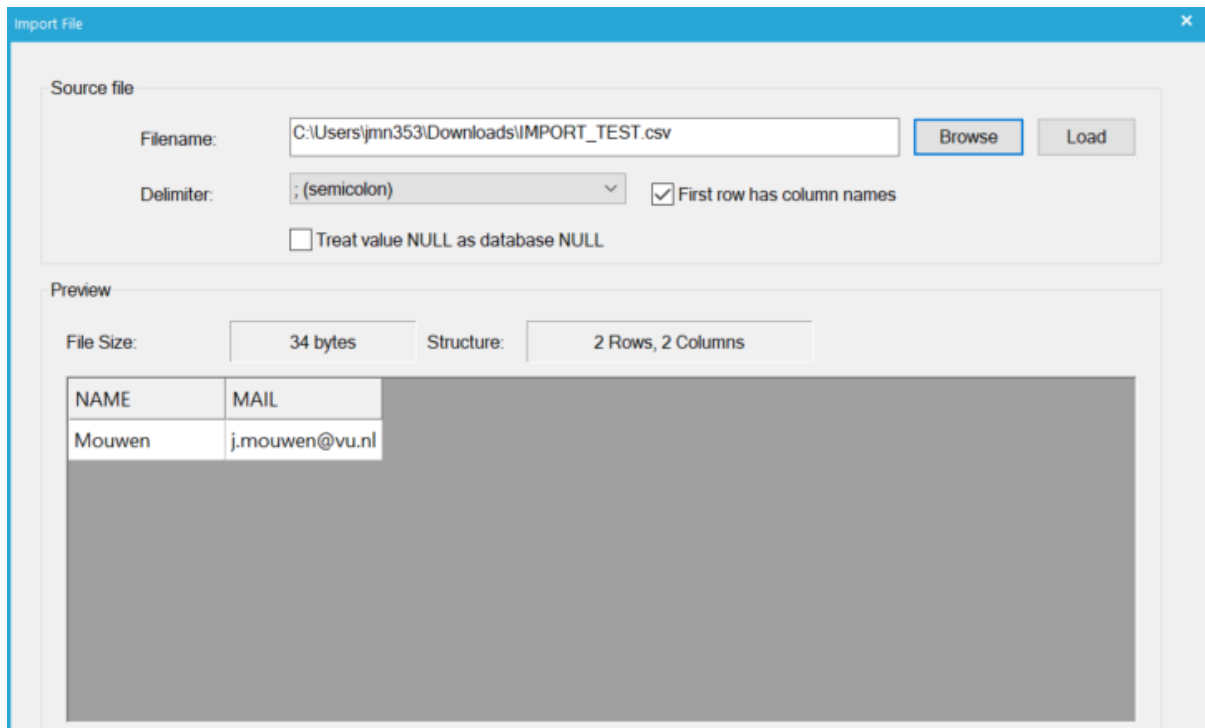
2. When your file is ready in Excel, save it as .CSV (Comma delimited).



3. You are now ready to start the import into Selligent. Click on the appropriate list into which you want to do the import and select 'Import data' at the top.



4. Click 'Browse' and select the appropriate .CSV file. You will then see a preview of the data with the column names above it in Selligent.



- It is important to always choose deduplicate. This allows you to remove duplicate email addresses in your file. This way an email is never sent twice to the same recipient.

The screenshot shows the 'Import File' dialog box. The 'Source file' section has 'Filename: C:\Users\jmn353\Downloads\IMPO...' and 'Delimiter: ; (semicolon)'. The 'Preview' section shows a table with columns 'NAME' and 'MAIL' and a row with 'Mouwen' and 'j.mouwen@vu.nl'. The 'Quality - Deduplication' section has a text box with 'No key fields selected' and a 'Fields' button. The 'Select Fields' dialog box is overlaid on top, showing a list of fields: 'NAME' (unchecked) and 'MAIL' (checked). An arrow points to the 'MAIL' checkbox. The 'Next >' button is highlighted in orange.

Continue to the next step and click 'Next'.

- Next, choose which import method you want to apply. Always choose 'merge with existing list'. This way, the data is added to the list and if there are already contacts from a previous import, they will not disappear because a merge takes place.
- Next, create a segment at the bottom of the menu and specify a name. It is advisable to take the date entry of the email sent with the subject after it, so that it is recognizable in terms of the segment. You will then immediately have your own segment for these newly imported contacts.

**Import File**

**Operation**

Select the method of import:

- New list
- Add to existing list
- Update existing list
- Merge with existing list

The operation you selected will update existing records in the database.

Define a key field to link the records in the import file to the existing records in the database. If the key field is not found, the record is considered non-existing.

Source key: MAIL = Destination Key: MAIL

**Destination Details**

List Name: USERS\_VU\_EXOTEN\_FCO\_PRC  Table name: USERS\_VU\_EXOTEN\_FCO\_PRC

Folder Name: Exoten > PROD > FCO

List type: UserList

List Description: Deze lijst wordt 1x/maand opgeschoond (alles ouder dan 1 maand). Je kunt niet niet voor de verstuurde e-mails afn

**Segment**

Create a segment to mark all users that have been updated by this operation. This segment can be used as a journey target audience.

Segment name: 20231012\_Import\_Jorin

Use a dedicated ID list table for this segment?

< Back Next > Cancel

Then click 'Next' again.



8. In the next screen, choose the *correct mapping*: which field from your .csv import file belongs to which field in the table? Check carefully that the fields are correctly mapped to each other.

The screenshot shows the 'Import File' dialog box. It features a table for field mapping and several configuration options.

**Operation**  
The table below contains an overview of all fields involved in this operation

Destination ...	Type	Length	Insert source	Update Source
ID	INTEGER			
MAIL	TEXT	100	MAIL	MAIL
NAME	TEXT	50	NAME	NAME
OPTOUT	INTEGER			
TESTUSER	INTEGER			
ONLY_TEXT	INTEGER			
OPTOUT_SO...	TEXT	50		
SUBSCRIBE_S...	TEXT	50		
CREATED_DT	DATETIME		GETDATE()	

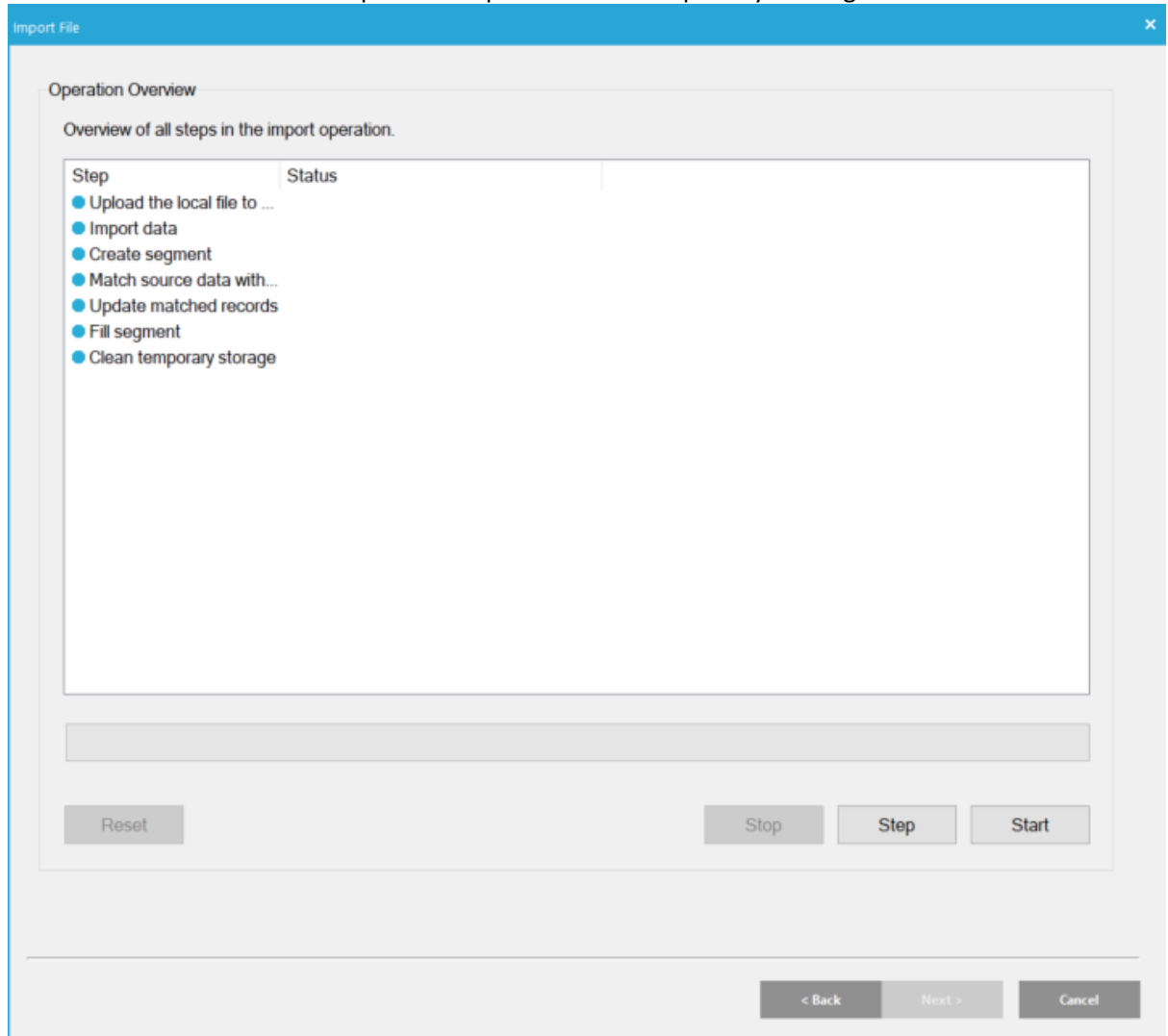
Split the import into multiple batches

2 Batch size

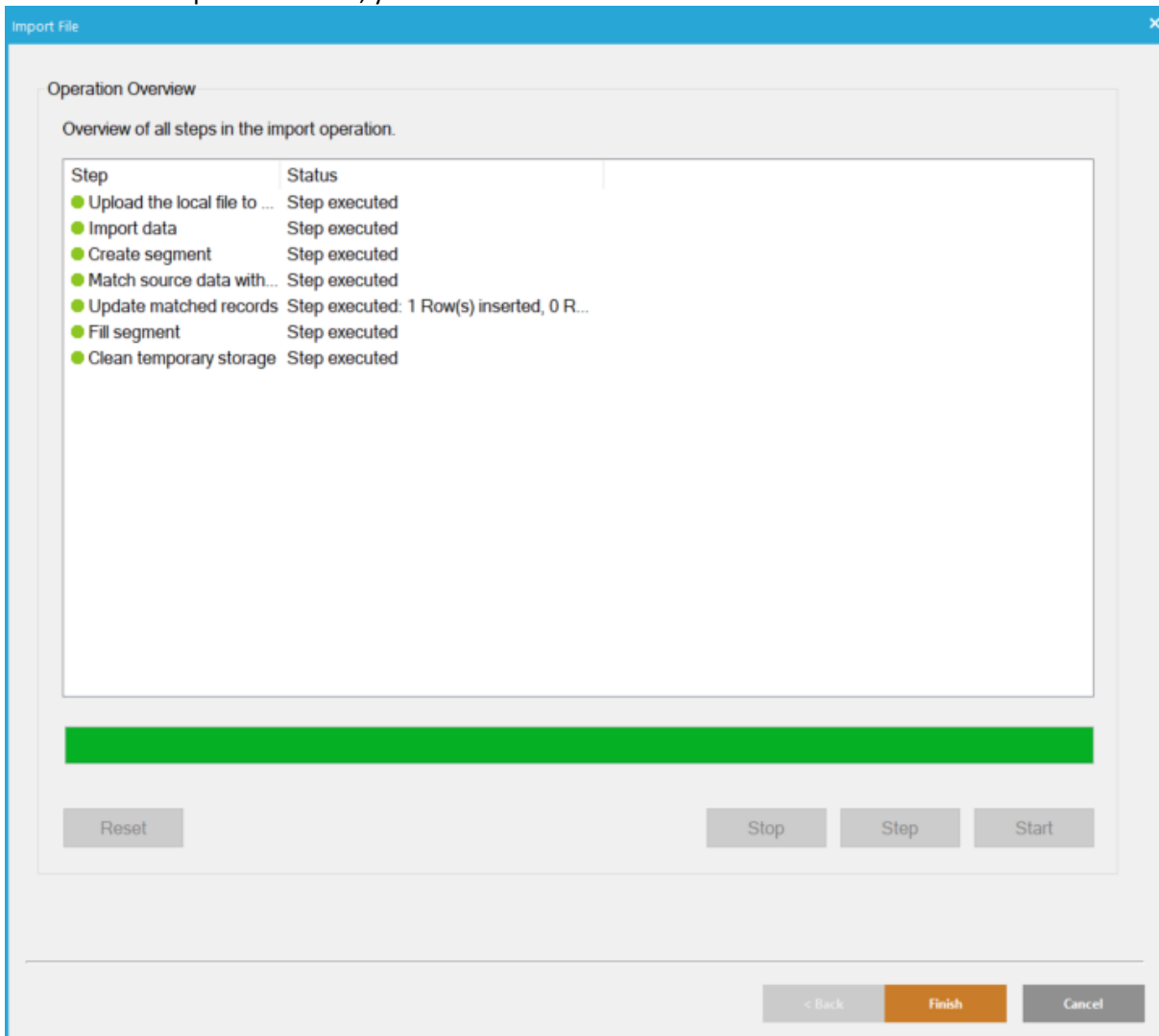
< Back Next > Cancel

Then click 'Next' again.

9. You now enter the final step of the import. Start the import by clicking 'Start'.



10. If the import went well, you will see the screen below. Click "Finish".



11. In the Segments tab, you will see the segment created.



12. After importing, always check the list. Scroll through your contacts. For example, is the MAIL field filled everywhere? Is the data per column correct? For example, is NAME always a name and not an email address? This is **very important** for correct mail delivery. Did you do a wrong import? If so, please contact [mailing@vu.nl](mailto:mailing@vu.nl) to make sure the addresses are imported correctly.

## Creating a testuser

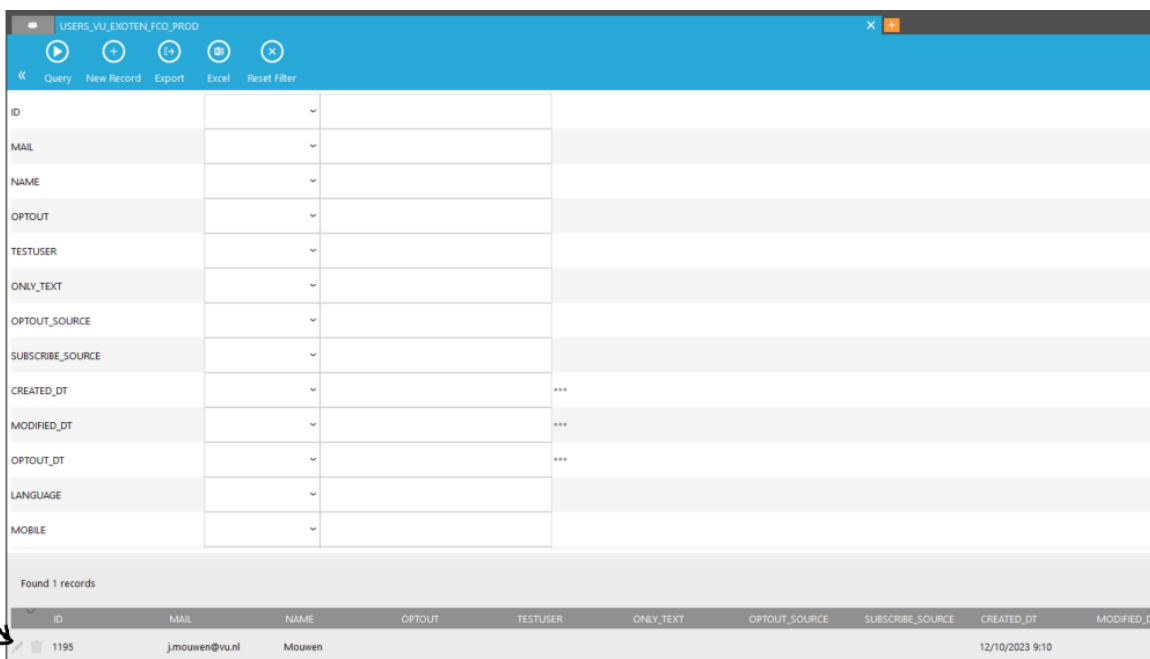
You can add a TEST user to the list in two ways. You need a TEST user to be able to send a TEST mail.

1. Add yourself to the list to be imported (.csv), make sure that the list contains a column TESTUSER as well as a column MAIL and that your TEST address has a value of 1.

MAIL	TESTUSER
<a href="mailto:j.mouwen@vu.nl">j.mouwen@vu.nl</a>	1
<a href="mailto:Mijn.adres@vu.nl">Mijn.adres@vu.nl</a>	

1. Add a test user afterwards:
  - Open the USER list and go to Data tab.
  - Click on (+) New Record, at the top of the bar
  - Enter the e-mail address and put a 1 at TESTUSER, confirm with OK

You can also create an existing contact in the list TESTUSER. Go to the list and search for the user you want to make TESTUSER. At the user you left click on the pencil to edit this user.



The screenshot shows a web application interface for managing users. The title bar reads "USERS\_VU\_EXOTEN\_FCO\_PROD". Below the title bar is a navigation bar with buttons for "Query", "New Record", "Export", "Excel", and "Reset Filter". The main area displays a list of user records with columns: ID, MAIL, NAME, OPTOUT, TESTUSER, ONLY\_TEXT, OPTOUT\_SOURCE, SUBSCRIBE\_SOURCE, CREATED\_DT, MODIFIED\_DT, OPTOUT\_DT, LANGUAGE, and MOBILE. The "TESTUSER" column is highlighted. Below the list, it says "Found 1 records". A table below shows one record with ID 1195, MAIL j.mouwen@vu.nl, NAME Mouwen, and CREATED\_DT 12/10/2023 9:10. A black arrow points to the "New Record" button in the navigation bar.

Next, in the TESTUSER column, add a 1. After that, click on "OK."

## Properties

The list below gives an overview of all of the properties of this user

Master Profile

Field	Value
ID	1195
MAIL	j.mouwen@vu.nl
NAME	Mouwen
OPTOUT	
TESTUSER	1
ONLY_TE...	
OPTOUT_...	
SUBSCRI...	
CREATED...	2023-10-12 09:10:05
MODIFIE...	
OPTOUT_...	
LANGUA...	
MOBILE	
BOUNCE...	
BOUNCE...	
FIRSTNA...	
DYNAMI...	
AANHEF	
PREFIXE	

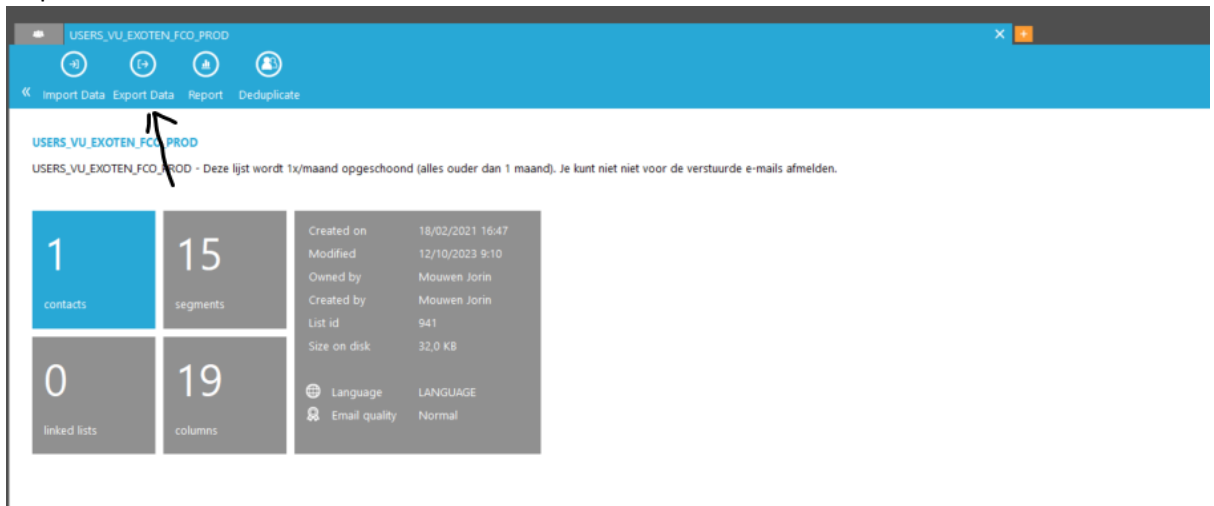
OK

Cancel

## Cleaning up and managing your own list

Since you are importing your own contacts, it is important to take care of your own import and list hygiene.

1. After sending a mail, always look at the list and columns OPTOUT, BOUNCECNT and BOUNCEDT. If values are entered here, then the mail delivery has been bounced. If a mail cannot be delivered up to three times, then an address is set to OPTOUT.
2. Create your own export of the list when a mail has been sent. This can be done via the 'Export data' button.



3. Next, under Fields, click Choose and choose the relevant fields. In this case, MAIL, BOUNCECNT, BOUNCEDT and OPTOUT. Then click on 'Export'.

Export Data

Data selection

List: USERS\_VU\_EXOTEN\_FCO\_PROD (USERS\_VU\_EXOTEN\_FCO\_PROD)

Segment:

Filter: No filter

Design Clear Count

Field Selection

Fields: SELLIGENT\_ID AS SELLIGENT ID  
ID AS ID Choose

Language Selection

Export language: Dutch (NL)

File Format

File Type: Tab delimited

First line contains column names

Encode UTF-8

Export Cancel

4. Next, in your own database/lists, update the bouncers and optouts. Clean this up. This will prevent these addresses from bouncing again or showing up on OPTOUT in the next import.

## Need help?

This guide is designed to ensure that you can create, test and send an email on your own.

In the unlikely event you run into certain issues, you can contact the Selligent Team in the following ways:

1. Send an e-mail to [mailing@vu.nl](mailto:mailing@vu.nl) with your question. For example, if you have an error message while logging in, you can send an email to the email address mentioned above. **Tip: add as much information as possible to your question. A screenshot of the error message will help the team to serve you faster.**
2. Submit a ticket via the ticket form\*:  
<https://vu.slgnt.eu/optiext/optiextension.dll?ID=Ji6VzENVcQAEmmHfgMgGyFmS7sEIQy8FFPvPmY0woQUwCgahNB2Wv196zCsRNRQZ86PQLUEpdL3gJU>

*\* The ticket form also allows you to request a mail segment.*