

Data List Management

Correctly structuring your data file/spreadsheet before uploading it into the Boingnet database will save you time and effort on your campaigns. This article will help you create a .CSV or Excel file that will upload and map easily, and will act as the backbone of your campaign(s).

PRO TIP: Always consult the Boingnet Knowledgebase for How-To articles & videos.

Click on <http://www.boingnet.com/knowledgebase/> and scroll down to “Lists” for the articles relevant to data lists.

Boingnet offers 5 different campaign types—Personalized URL or pURL, Lead Generation, Email, Drip Nurture and Audiences. The campaign types **all can be configured to interact with lists in various ways**, so taking some time upfront to think through your data and list strategy makes a ton of sense.

Boingnet has 3 categories of field types—Basic, Contact and Custom. Any or all may be used included in a list to be used for a campaign. All Boingnet data fields are **text fields**—meaning they will accept all alphanumeric characters. If your data file has punctuation marks, special characters, quotations (both double and single) or any other non alphanumeric characters, it may impact the import process. Also, if any of the cells in your spreadsheet contain formulas or formatting, that may also impact the import process.

| Basic | Contact |
|------------|----------------|
| First Name | Email |
| Last Name | Mobile |
| Address1 | Phone |
| Address2 | Twitter Handle |
| City | LinkedIn Id |
| State | Facebook |
| Zip | Website |
| Company | |
| Title | |

Custom Fields (we call them Variable Data fields) are fields that you define on your contact list. These are used for personalization or to collect data using your web form. Each time you upload a contact list, you have space for up to 35 Variable Data Fields. You'll see them referred to as **Variable Data 1-35** or **Var Data 1-35**.

Each field that you want to use in a Boingnet campaign (in any capacity) must be included in the data file.

When formatting the data file for your campaign—think through the following questions:

1) What is needed?

For an integrated direct mail campaign with pURLs and/or email, your list will need (at a minimum):

- Physical addresses for your direct mail
- First Name and Last Name for pURL Generation (typically)
- Email addresses (for email campaigns, or if you want to capture email addresses in a form)

Most campaigns use at least these fields.

pURL Structure

Your pURL structure strategy has an impact on what data fields you'll need. For the pURL structure, you have a few options that will impact how you structure your data file:

Friendly URL Strings: Choose two fields from your contact list you want to use as the unique identifiers. If you choose first name and last name as the identifiers, Boingnet will automatically de-duplicate the list. For example: [firstname.lastname.yourdomain.com](#) If you do not have good first/last name data, you can use other fields such as Company and Address.

Random URL Strings: This option does not require any data elements in your list. The Random URL String option will keep your URLs short which is a good practice for direct mail. Boingnet can generate a random set of characters for you that will identify each prospect in your campaign uniquely. For example: [F2O1.yourdomain.com](#)

In your data file, each field needs to be organized in a separate column with a unique header:

| First Name | Last Name | Address | City | State | Zip | Email |
|------------|-----------|--------------|----------|-------|-------|--------------------|
| John | Smith | 123 Main St. | Anywhere | MA | 02066 | jsmith@company.com |

2) What data do you want to use or capture in forms?

Make sure your data file contains a column with a unique header for every data field you want to capture through a Boingnet web form. This is NEW data that will be added to the contact records when the forms are filled out. This will prompt the system to allocate space in your contact database for that field.

For example, if you want your user to enter their **Industry**, then add a column to your data file with **Industry** as a column header—you do not need to include any data in this column. Once you do this, you'll be able to add Industry to any forms used to capture information from your users.

| First Name | Last Name | Address1 | City | State | Zip | Email | Industry |
|------------|-----------|--------------|----------|-------|-------|--------------------|----------|
| John | Smith | 123 Main St. | Anywhere | MA | 02066 | jsmith@company.com | |

Our Field Mappings feature does allow you to allocate space for a new field once the list has been mapped in case you forget a field on the initial upload.

3) What data do you want to use for personalization in your emails and landing pages?

Using data to personalize your emails and landing pages requires a unique field to be on your data file **PRIOR** to the upload and mapping process.

For example, if you'd like your page to display different promotions based on Region, then you'll need to include a column that contains the Region data on your spreadsheet:

| First Name | Last Name | Address1 | City | State | Zip | Email | Industry | Region |
|------------|-----------|--------------|----------|-------|-------|--------------------|----------|-----------|
| John | Smith | 123 Main St. | Anywhere | MA | 02066 | jsmith@company.com | | NorthEast |

Recap: The spreadsheet now contains all the information needed for the direct mail fulfillment (Street, City, State, Zip), the personalized URL (First Name and Last Name), the web form (Industry) and for personalization by Region. Notice that each field is contained in a separate column, and each column has a unique header.

When formatting your csv or excel file, the following is VERY IMPORTANT:

- All data should be contained in one sheet
- All columns must have a **header or title** in the same row. Headers should be alphanumeric - no spaces, no blank columns.
- Do not include hidden columns or rows (here's how to remove them - <https://www.extendoffice.com/documents/excel/857-excel-delete-hidden-rows-columns.html>)
- Do not use special characters—use letters & numbers only
- Do not wrap text (make sure “Wrap Text” is unchecked for the entire sheet!)
- All data should be in text format—without formatting or formulas. (Here's how to clear formatting or comments: <https://support.office.com/en-us/article/Clear-cells-of-contents-or-formats-9ff6b8ff-1afd-495f-8ad8-8c1f6f82a9d6>)

Important: If you have more than one email or address for a customer make sure the columns are labeled with unique names - such as Business Email, Home Email, Other Email etc.

Whoops—I uploaded my list and now realize I need another field!

This actually happens quite a bit - let's say your boss or your client changes their mind, and now they want an additional field collected in a form. We have an easy solution - our Field Mapping tool. Here's an article from the Boingnet Knowledgebase that will show you how to add new fields to previously mapped lists: <http://www.boingnet.com/knowledgebase/edit-list-mappings/>

If you have questions—reach out!

Our goal is to help you design data driven campaigns quickly and easily. If you have any questions or concerns, we are here to help. Email us at support@boingnet.com with your questions, attach your file, and we'll help you structure it for success!