





Setting up import automation

Smart Guide

This Smart Guide shows you how to use import automation to import recipient data at regular intervals from an external system (CRM, ERP etc.) into *Inxmail Professional*. Once this has been set up, it functions fully automatically.

Preparation: The recipient data must be stored on an SFTP server in CSV format by the external system. Specify the cycle in which the external system updates the data [1]. The columns that are imported must be created in Inxmail in the correct format (text, date, etc.) before the import.

DEFINE SETTINGS

1. Open the  (*Global settings*) and the  *Import automation* agent.
2. Click  (*Create new import*).
3. Enter a name for the import and click *OK* to confirm. The  *Settings* workflow step opens.
4. Specify import source: Click *Configure*.
5. In the displayed dialog box, enter the *Source path* under which the files to be imported are stored [2].
6. Enter the information required for authentication on the server in the *User name*, *Password*, *Private key* and *Passphrase* fields. The following combinations can be used for authentication:
 - User name + password
 - User name + private key
 - User name + private key + passphrase
7. Click *Test access* [3]. The *OK* button becomes active after the access test has been performed successfully.
8. Confirm the dialog box by clicking *OK*.
9. Specify import target: *Global settings* imports recipients to the global recipients list. Lists imports recipients to the selected *Tab* of the mailing list.
10. Settings for the CSV file: Click *Edit* to inform *Inxmail Professional* of how the import file is constructed. Store desired values:

Select the *Character set encoding of the source file*:

Enter the *Source column with email address* that contains the email address in the import file. The system assigns the name you enter here to the 'email' column in Inxmail Professional.

[1] SFTP SERVER

For security reasons, you require an SFTP server as the storage location. Inxmail can take care of this for you, too. Get in touch with your customer care contact person.

[2] SOURCE PATH

Note the following requirements when specifying the source path:

- > The SFTP protocol must be used for security reasons.
- > It is possible to specify a directory or particular data.
- > The following file types are imported: csv, gz or csv.gz
- > It is not possible to activate multiple imports with the same source path.



[3] TEST ACCESS

Here it is possible to check whether access to the server (or the file import) is possible. To ensure that an import can be carried out properly, read permissions must be set for the source directory. Write permissions only need to be set if the import log is to be stored in or deleted from the source directory.


Select the *Separator of columns* that separates the columns. Alternatively, you can enter a character of your own.


Enable *Values have text delimiters* if the import file contains text delimiting characters (such as commas within decimal values).

Masking of text delimiters: Select the *Duplicate text delimiters* or *Preceding backslash* entry to mask the text delimiters. This ensures that the system actually interprets text delimiters as such and does not interpret them as column separators.

11. Confirm the dialog box by clicking *OK*.
12. Format of the CSV data: Click *Edit* to inform Inxmail Professional of the format of the data in the import file. The settings apply to all import files. Store values:
 - Specify *Yes/No* value. Values relate to columns of the Yes/No data type. Specify either the value for Yes or the value for No [4].
 - Select *Date format*. Manual entry is possible (ISO 8601 standard).
 - Select *Time format*. Manual entry is possible (ISO 8601 standard).
 - Select *Date/time* format. Manual entry is possible (ISO 8601 standard).
 - Enter *Thousands separator*.
 - Enter *Decimal separator*. Decimal separator and thousands separator must not be the same.
13. Confirm by clicking *OK*.
14. Click  *Test settings* [5].
15. Specify *Import interval*: the intervals in which the import file should be imported.
16. Specify *Import options*: Define *Time zone* [6] and other import options.
17. Click  (*Save*).

MANAGE CONFLICTS

Open the  *Conflicts* workflow step. Here you specify how the system should handle data that already exists in the recipient table [7].

18. Select the desired import rule. Activate special settings and notifications, if necessary.
19. Click  (*Save*).

[4] YES/NO VALUE ASSIGNMENT

If you have specified a value for Yes, all other values in the column will be interpreted by the system as No. If you have specified a value for No, all other values will be interpreted by the system as Yes.

You can enter any characters in the input field. No distinction is made between upper and lower case.

The system interprets empty data fields in the import file either as Yes or No, depending on the setting.

[5] TEST SETTINGS

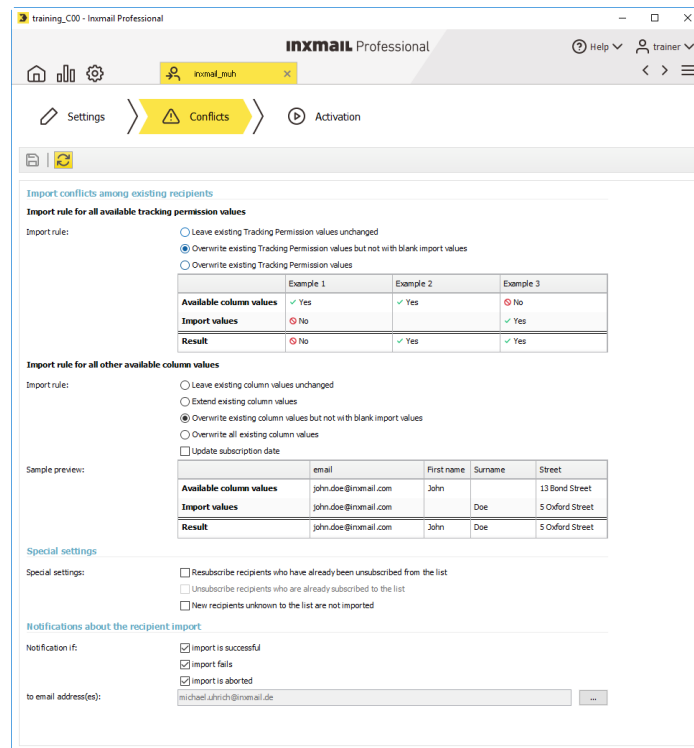
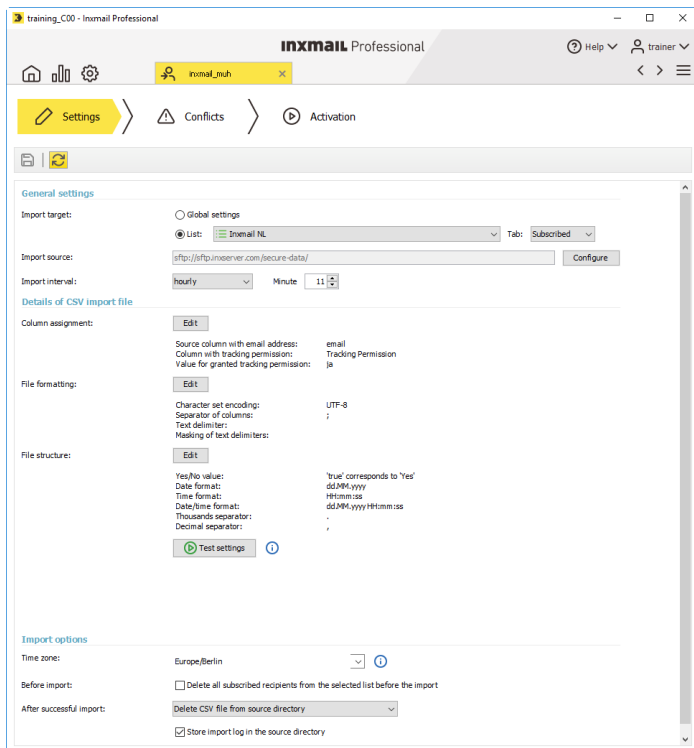
You can check whether the import works with the selected settings.

A suitable file must be stored in the selected source path in order to test the settings.

The test is restricted to the first 15 lines. No data is transferred to the system during the test.

[6] TIME ZONE

Select the time zone that was used when creating the recipient data in order to keep your data consistent. The time zones are shown in UTC (Germany UTC+1).



ACTIVATION

Open the *Activation* workflow step. To ensure that an import can be performed automatically by the system, it must be activated first [8].

20. Click *Activate*.
21. Save a comment, if necessary, in the dialog box that appears and confirm your entries with *OK*.
22. Confirm the dialog with *Yes*. The automated import is now active and is conducted at the specified intervals. The last activated (or deactivated) import is displayed at the top of the status changes table.

ADDITIONAL: DEACTIVATION

An activated import must be deleted or deactivated in order to stop it [9].

1. Select the import to be stopped and open the *Activation* workflow step.
2. Click the *Deactivate* button. The *Deactivate import* dialog box opens.
3. Confirm with *OK* and close the dialog with *Yes*.

[7] CONFLICTS

Select the time zone that was used when creating the recipient data in order to keep your data consistent. The time zones are shown in UTC (Germany UTC+1).

[8] ACTIVATION

The import conflict options are disabled if you are importing data to the Unsubscribed tab of a list.

[9] DEACTIVATION

Unlike when you delete an import, all the import settings remain in the system when you deactivate an import.