TEXTMAXX PRO – CELL UPLOAD USER GUIDE

A guide to uploading your cell data into the Textmaxx Pro system

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Intended Audience: *Textmaxx Pro clients wishing to upload cell data into the system*

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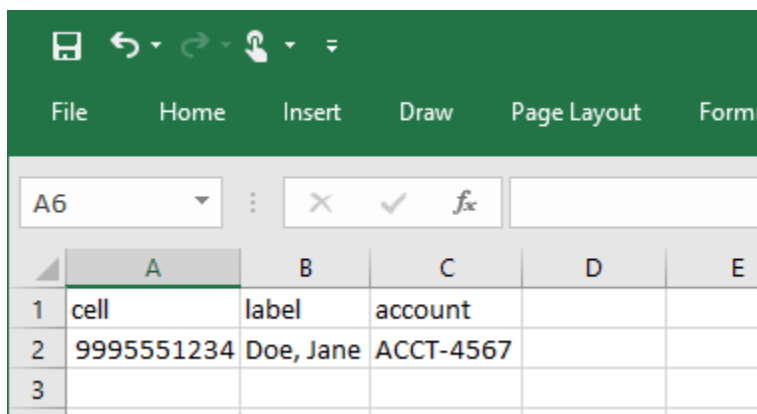
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Working with CSV

Character Separated Values, or "CSV", files offer a simple way to share data between two disparate systems. The "C"haracter in CSV files is often a comma. CSV files are human readable text files so they can easily be manipulated in your favorite text editing software program like Notepad®. Microsoft Excel® also has built-in support for handling CSV files. Note that not every Excel file is a CSV file. The Textmaxx Upload feature does not accept Excel files. Using the "File->Save As…" feature in Excel allows you to save the current sheet as a CSV file. Here are the contents of a simple CSV file:

```
cell,label,account
9995551234,"Doe, Jane",ACCT-4567
```

This CSV file has two rows and three columns. The first row "cell,label,account" is known as a header row. It is not always required but is often provided. The header row describes the data in each column. The first column will contain a cell number, the second column a label for that cell number and the third an account identity for the cell phone owner. The rest of the rows are known as "records". Each new row (or line) is a separate record. You may have hundreds or even thousands of records. This example just has one. Each field or column in a record is separated by a comma. Notice the double quotes around "Doe, Jane". If you ever expect a field in a record to contain a comma you'll want to wrap that value in double quotes as seen above. This ensures the comma will not be interpreted as a new column. This is handled for you in Excel when saving your sheet as CSV.

The simple CSV example above would look like this in Excel:

Click "File" at the top left and choose "Save As…" to save your Excel sheet as a CSV file. Whether you use Excel, Notepad or some other editor refer back to this section if you need help constructing your CSV submission file. To get started download our handy template file.

Field Descriptions

To get started download the cell upload template file provided by Textmaxx Pro. The table below shows all of the upload fields within each record with examples and descriptions of each. Only the cell and label are required to have a value.

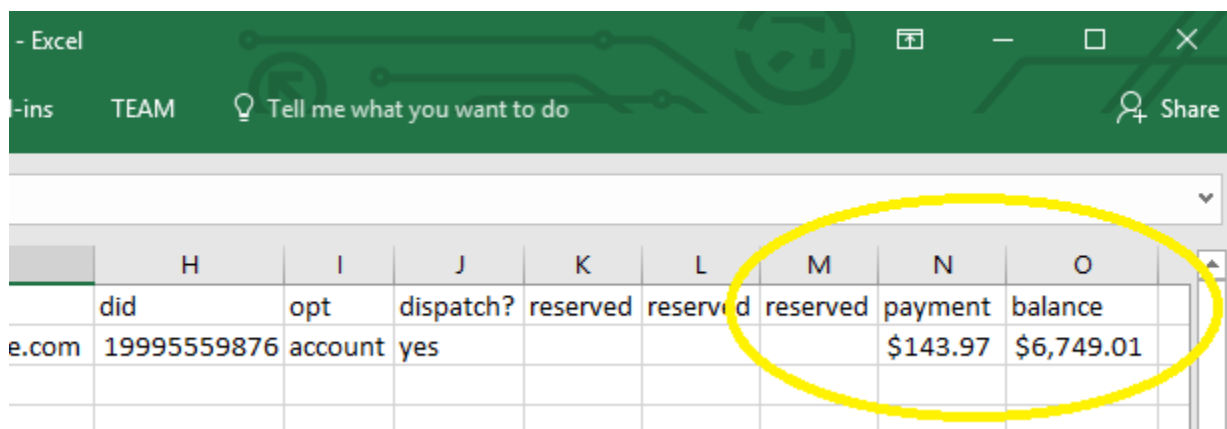| Col	Name	Example	Description	Type	Length
A	cell	999-555-1234	The cell phone you want to add or update in the system. **_Special characters are ok and will be ignored_**.	numeric	10-11 digits
B	label	Julie Henry #12397	A label for the cell number. Typically a name, account number or both.	No character restrictions	1-29
C	account	01-12397	An internal account number used by your company to uniquely identify the cell phone owner.	alphanumeric, underscores, dashes, colons and spaces	0-37
D	dob	01/01/1987	The cell phone owner date of birth. The year is ignored so it can be anything reasonable.	date *(most formats supported)*	N/A
E	language	en	The preferred cell owner language. A two character language code as defined by the ISO 639-1 standard.	ISO 639-1 en – English es – Spanish *(default: en)*	2
F	tags	Collections,Payment	A comma separated list of tags associated with the cell. If a tag does not exist in Textmaxx it will be created. **_These will replace any existing tags so the list should be exhaustive._**	each tag: alphanumeric, underscores, dashes, colons and spaces	< 255

Col	Name	Example	Description	Type	Length
G	employees	me@email.com	A comma separated list of employee email addresses to link to the cell. ***The employee must exist as a user in Textmaxx with the given email.*** *(the last email in the list is the only one currently used)*	valid email addresses	< 1024
H	did	+1 (999) 555-9901	When an opt-in or welcome message needs to be sent this will be the from number. The client must own and have provisioned this number in the Textmaxx system. Special characters are ok and will be ignored.	numeric *(default: client primary number)*	10-11 digits
I	opt	account	The type of opt-in message to be sent/the opt-in method to use for this cell when sending opt-in messages. Must have permission for: • "promo" • "account" • "all"	account promo all *(account & promo)* none *(case insensitive)* *(default: account)*	0-37
J	dispatch?	yes	Indicates whether or not the opt-in or welcome message will be sent when needed. When "false" or "no" the cell record is updated in Textmaxx and <u>no messages are sent.</u>	"yes", "true", or "1" all others interpreted as "false" or "no". *(case insensitive)* *(default: no)*	N/A

Col	Name	Example	Description	Type	Length
K	message	template name: Past Due - 5 days raw message: RAW;Please give [@clientname] a call at your earliest convenience.	Send a message to this cell if they are already opted-in. If not, send the opt-in message ignoring the *dispatch?* (J) column. Provide the name of an available template message or the raw message contents by prefixing the column value with "RAW;" (case sensitive).	String: Any characters allowed in a template label (name) or message.	< 50 (template name) < 512 (raw message)
L	*reserved*		*1 of 2 columns reserved for future use*	*N/A*	*N/A*
M	*reserved*		*2 of 2 columns reserved for future use*	*N/A*	*N/A*

Client Defined Variables

In addition to the current set of fields you may send up to ten more named columns (fields) that will be stored with each cell. Those variables can then be used in your outbound messages to provide context. This section describes their submission and usage in the Textmaxx Pro system.
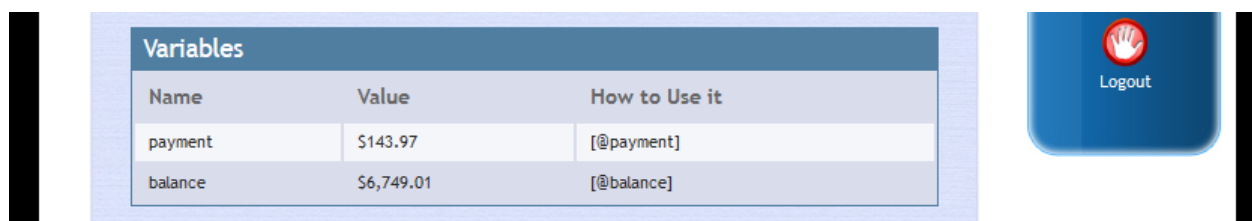
This feature requires the CSV header row. It is required to be the first line/row in the CSV submission file. The header row provides the name for each variable. You will use that name in your outbound messages to provide context when conversing with your cells. The variable names may only contain letters and numbers, no spaces. Below is an excerpt from an example submission containing two variables (payment and balance):
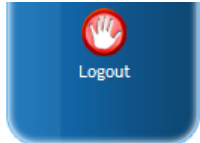

In this example you can see two client defined variables just after the last *reserved* column. This client chose to send over "payment" and "balance". The first line/row in this CSV file is the header. The header tells the Textmaxx system the name of your variables. In a message to this cell the literal text "[@payment]" would get replaced with "$143.97" before being sent. Notice that all the formatting you want for the values needs to be sent as well. If you only provided "6749.01", for instance, the Textmaxx system will not know to format that to a currency value. It would be sent as "6749.01" not "$6,749.01". This gives you the opportunity to format the information in any way you desire. You may submit up to ten extra columns for your cells.

To check the status of the variables for any given cell you can view them on the cell card from within the Textmaxx Pro system:
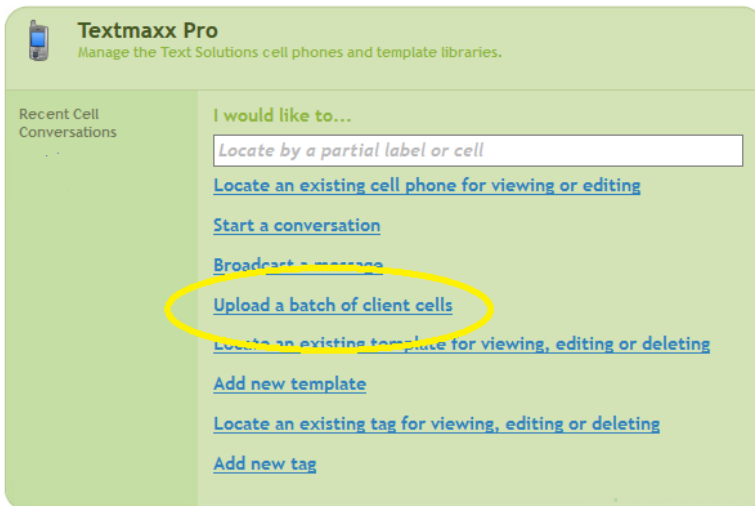
Submitting a File

Files are submitted by logging into the [Textmaxx Pro system](#). Only Textmaxx administrator users have the ability to upload cell files.

Once in the system click on the "Upload a batch of client cells" link found under the Textmaxx Pro module on the left.

1. Select your opt-in method, typically "Account Only"
2. Allow Textmaxx to send the opt-in message when one is needed or select "None" when you want populate or update Textmaxx with your cells and other data but not send any messages.
3. Click "Browse" to find the upload file on your computer or network.
4. Select any tags you want to use. If there are tags in the upload file they will replace any selection here.
5. Provide a notification email
6. Click "Upload Cells"

If there are no errors found in your file submission the cells are placed in a queue for later processing. The upload service checks every fifteen minutes for queued cells.

You should receive two emails from the system. The first will detail your initial upload. The second email notification will be sent after the queued cells are processed and loaded into the Textmaxx system. You should then see your uploaded cells in the system and can begin to start conversing with your clients once they have opted-in for communication with you.

SFTP File Submissions

If you have the capability to automate your cell submissions we can setup an SFTP folder for you. SFTP is also available if you would just rather not login to the application every time to submit your file. Any file that you would upload manually via the web application you can submit via SFTP. All of the same file rules and layouts apply. To receive your credentials and connectivity information please email or call the Textmaxx Pro support team.

Appendix A: Document Revisions

1.3.1 to 1.4.0

February 18th, 2017

- Added the description for the new "message" (K) column which allows the file submitter to send an SMS message to the cell based on a template name or the raw message contents by prefixing the value with "RAW;" (case sensitive).

1.3.0 to 1.3.1

October 25th, 2016

- Added new verbiage and highlighted other verbiage in the cell field descriptions.
- Added in a "column" to the cell field descriptions table that will match the column in Excel where most upload files are built.

1.2.0 to 1.3.0

September 15th, 2016

- Added a new paragraph to the submission section explaining the SFTP option.

1.1.0 to 1.2.0

September 13th, 2016

- Fixed a verbiage issue in the table of contents for Client Defined Variables. Removed the word "that" to make the sentence readable.

1.0.0 to 1.1.0

September 9th, 2016

- Fixed some grammar and spelling mistakes
- Added in the new Client Defined Variables section

1.0.0

September 7th, 2016

- Initial document completed