Data Import Overview

Bluecore supports importing one-off data files by either manually importing a CSV file or through SFTP.

Well-formatted data imports ensure that your data is accurate, and complete so you can use it to target your customer base and send out campaigns.

Before you import your data, use this guide to make sure the data and file is formatted correctly.

Getting your data ready

File imports may take up to 24 hours, regardless of file size. Importing and processing times depend on the total number of records uploaded and processed across the entire Bluecore platform at any given time. There is no direct correlation between file size and import time–smaller imports can still take up to 24 hours to complete.

> ⚠ Do not upload a file more than once, as this will further slow down processing. Contact support if your file import still isn't complete after 24 hours.

Before you upload your data, it must first be in the correct format and styling for Bluecore to accept.

File naming convention

The file name should use the following naming convention and format requirements:
- Format
  - All lowercase, and no spaces or special characters used in the name
- Naming convention
  - <company_name>_<data_type>_<date>.csv
  - Example: bluecore_productdata_2016-02-03.csv

File format

All files must have the following format:
- All data must be delivered in a flat file CSV format (Excel XSLX files are not supported).
- All files must be UTF-8 compliant.
- All files must include header rows which define the columns within the file.
- The header row cannot start with a number or contain any special characters–other than underscores–and must be less than 30 characters in length.

Date and Time

When date and timestamps are included in a file, these detail records must be in one of the following formats:
- MM/DD/YYYY HH:MM
  - Example: 06/12/2018 15:36

- YYYY-MM-DDTHH:MM:SS
    - Example: 2018-06-12T15:36:16
- UNIX timestamps
    - Example: 1528832176

All times must be in UTC.

The date and time formats above, with the exception of UNIX timestamps, must be:
- Zero-padded
    - Example: *06* is June, *05* is the fifth day of the month
- In a 24-hour format
    - Example: *15:36* is 3:36pm

Converting to the correct date and time format

If your date and time is in a format other than UTC, complete the following to convert it to UTC:

1. In Google Sheets, highlight the column of date/timestamp you want to convert.

2. Click **Format > Number > Custom Date and Time**

3. Add year, month, day and time in the proper format using the dropdown, then click**Apply**.

Data Hygiene

Delimiters

- The values should be comma-delimited, meaning each different value within a row should be separated by a comma without spaces.
- Each record should be Control Line Feed delimited.
- See the following screenshots using the same data from a Google Sheet to a CSV with correct delimiters.

You are responsible for ensuring that the imports don't contain delimiters, or any characters that are part of text qualifiers.

Personally Identifiable Information (PII)

If you sent PII into Bluecore, make sure they are always transmitted or shared securely.

CAN-SPAM/CASL Compliance

You are responsible for ensuring all imported email address eligibility updates are accurate.

File Formats and Limits

Files sent to Bluecore must meet the requirements outlinedhere, including being UTF-8 (UCS Transformation Format 8) compliant. UTF-8 is the most common character encoding standard for

electronic communication.

If your list import file contains international or unicode characters, you will need to save the file in UTF-8 encoding. The steps for saving your file with UTF-8 encoding varies depending on the spreadsheet application or text editor that you use.

Excel (for Windows)

1. Go to **File > Save as…**

2. In the Save as type drop-down, select **Text (Tab delimited) (*.txt)** or **CSV (Comma delimited)**.

3. In the Tools drop-down, select **Web Options**.

4. From the Encoding tab, choose **Unicode (UTF-8)**.

5. Click **OK**.

6. Click **Save**.

Excel (for Mac)

Excel for Mac supports exporting UTF-8 encoded files in versions 15.29 or later.

1. Go to **File > Save As…**

2. Select **CSV UTF-8 (Comma delimited) (.csv)**

3. Click **Save**.

Notepad (for Windows)

1. Open a new document.

2. Go to **File > Save As…**

3. Under **Encoding, select UTF-8.**

4. Click **Save**.

ⓘ NotePad documents are automatically saved with ANSI encoding. Manually change the encoding before saving a new document.

TextEdit (for Mac)

1. Open a new document.

2. Go to **Format > Make Plain Text**.

3. Click **File > Save…**

4. From the Plain Text Encoding drop-down, select **Unicode (UTF-8)**.

5. Click **Save**.

Google Sheets

1. Upload your file using Google Drive.

2. Open the file with Google Sheets.

3. Click **File > Download as > Comma-separated values (.csv)** . The file will be automatically saved with UTF-8 encoding and downloaded to your computer.

Limits

Most files will be within Bluecore's size limitations, but there are rare instances where a file might be too large to import.

File rows must be less than 1 MB and each cell must be less than 1 KB.

Each row in the file must be less than 1 MB and each cell in the file must be less than 1 KB. (Cells for "unindexed" columns can technically be up to 100 KB. Speak with your account manager if the 1 KB cell size limit is of concern to you.)

Email Address Validation

Email address data must use RFC 5336 format.

How to Import Data

Now that your file is formatted appropriately, you can import it into Bluecore.

Use browser imports or SFTP when you want to do one-off uploads. For historical uploads, contact your CSM for a special workflow. Do not manually import historical data.

Complete the following steps to import your data:

Import via Browser

1. Navigate to **Data > File Management**.

2. Click **Create New Import.**

3. Select **Upload via Browser**.

4. Select a Data Type to import. You can upload customer data, product data, coupons, unsubscribe lists, and opt-in lists. For more information about data types, see supported data types for importing.

5. Click **Continue**.
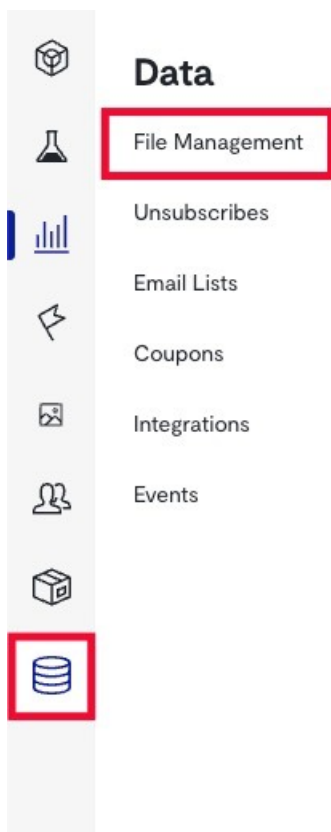
6. On the Settings tab, enter the following:
   - Import Name
     - The import file's name
   - Select File: Upload the import file. The file will be uploaded and validated. This may take a few minutes depending on the file size. For more information about file types, see Save a UTF-8 Compliant File.

> ⊘ Files exceeding 3.5 GB are not recommended for browser upload. Reduce file size by removing unnecessary columns (preferred) or by reducing the number of rows in the file.

7. Click **Save & Continue** once the file is uploaded and validated. You will be able to review the file before it is imported. If there is an error, click Download validation errors in a CSV file to download the file and correct the issue(s). Once you have corrected the file, start the import process as you would with a new file.

Import via SFTP

1. Navigate to **Data > File Management**.

1. Click Create New Import.

2. Select **Upload via SFTP**.

3. Select a Data Type to import. You can upload customer data, product data, coupons, unsubscribe lists, and opt-in lists. For more information about data types, see Data types overview..

4. Click **Continue**.

5. On the Settings tab, enter the following::
- Import Name
  - The import file name. This displays in the File Management table.
- SFTP Directory
  - Enter the directory where the import file was placed.
- Filename Structure
  - The name of the file in the directory
- Test SFTP Connection and File Format: Tests the SFTP connection and validates if the file format is accurate. This may take a few minutes depending on the file size.

6. Click **Save & Continue** once the file is uploaded and validated. You will be able to review the file before it is imported. If there is an error, click Download validation errors in a CSV file to download the file and correct the issue(s). Once you have corrected the file, start the import process as you would with a new file.

Coupon Data Imports

Coupon data imports have additional fields than other imports. Complete the steps outline in Import via Browser or Import via SFTP, depending on how you want to import coupons, then configure the following:
- Channel Type: Select to configure the coupons for Communicate or Site.
- Add to New Bank or Existing Bank: Decide if you want to add your coupon list to a new bank or one already in use. If the bank is already used in campaigns, it is easier to upload more banks to an existing bank.
- Coupon Type: Select the coupon type that most closely matches the offer. Options include: Free Shipping, % Off, $ Off, Buy One Get OneFree, and Other.
- Coupon Value: If $ Off or % Off are selected, enter the discount value here.

Click **Save & Continue** once the file is uploaded and validated. You will be able to review the file before it is imported. If there is an error, click Download validation errors in a CSV file to download the file and correct the issue(s).

Once you have corrected the file, start the import process as you would with a new file.

Configuring the Import

1. Select the columns to Include by checking the boxes in the corresponding rows.

2. From the Map to Bluecore Attribute drop-down, select the Bluecore attribute that should be associated with the value in Your Column.

Example from Customer Data:

Include	Your Column	Map to Bluecore Attribute ?	Data Type	Examples From Your File		REQUIRED ATTRIBUTES
☑	email	email ▾	STRING	asdfgdfa.a@gmail.com ldkfg.dsfg5@gmail.com gkl3g3@yahoo.com dfsg27@hotmail.com mcsdfgdgk@gmail.com		email ⊘
☐	first_name	Select Attribute ▾	STRING ▾	Jessica Haley Bobbie Keely Kristen		
☐	last_name	Select Attribute ▾	STRING ▾	A M F K M		
☐	birthday	Select Attribute ▾	STRING ▾	8/3/87 5/25/85 8/5/72 8/27/86 6/7/76		
☐	zip_code	Select Attribute ▾	STRING ▾	99362 80504 72712 22901 92115		

+Add Custom Column ?

3. Review the Data Type and Examples from Your File columns:
   - The Data Type column shows the data type of the attribute.
   - The Examples From Your File column shows a sample of the attribute pulled from the file you are importing.

4. To add a value to every row in your file, click **+ Add Custom Column.**
   - From the Map to Bluecore Attribute drop-down menu, select the Bluecore attribute that should be associated with the Your Column value.
   - In the Value field, enter the attribute's value that will be appended to each row.

5. Ensure all of the required fields are included in the file. The fields will display in the Required Attributes section with a green check.

6. Click **Save & Continue**.

Review and Import

1. Review the summary to ensure the file is configured correctly.

2. Click **Import File Now**.

When the file is done importing, Import Summary will display.