Import Specification

Import Specifications (import Spec) are created to load external data sources into the DigiDesk database. Data mapping is required to ensure that data in the external data source matches the data input into the database.

Rules for CSV imports

1) Field labels need to be specified in the first row of the CSV file. The first row of the CSV file will not be parsed for data, only for field names.

2) The standard DigiDesk field names and descriptions are detailed below:

CampaignName	Will be matched against [campaign name] within the DigiDesk account. This field is case sensitive. When matched, the survey will be sent from the specified campaign.
AgentName	Will be recorded as the [agent name] for the survey. If the 'Agent Name' matches an [agent name] within the DigiDesk account, the survey will be attributed to that agent.
CustomerName	Will be recorded as the [customer name] for the survey.
EmailAddress	Will be validated and used to send email invites.
PhoneNumber	Will be validated and used to send SMS invites.

3) Additional DigiDesk field names available and descriptions are detailed below:

CustomerID	Will be recorded as the [account_number] for the survey. If the 'CustomerID' matches an [account_number] within the DigiDesk account, the survey will be attributed to that customer.
CRMFields	A number of CRM Fields can be set up to match CRM Fields within the DigiDesk account. The data from these fields can be matched and appended to completed survey records.

4) All CSV import file names must be unique. Our preferred format is detailed below:

Format	[DDMMYY]_[Account Name]_[Campaign Name]_[Any String].CSV
Example	150521_Accountname_Campaignname_Anystring.CSV

Where import files are being sent multiple times per day, we advise the use of [Any String] to provide a unique identifier for each file name. Further examples detailed below:

File 1	150521_Accountname_Campaignname_10am.CSV
File 2	150521_Accountname_Campaignname_2pm.CSV

5) An example CSV import file, with dummy data, is required from the customer for review 'before' any proposed campaign launch date. The example file will need to be checked for adherence to the above rules before a campaign launch date can be agreed.