



QRC – Uploading a CSV-Excel List to Marketing Suite

Introduction

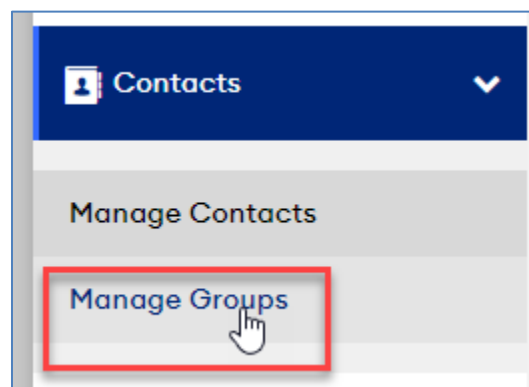
The new Equitable Advisors Marketing Suite allows for both syncing with Salesforce (recommended option) and uploading a CSV excel file to import your contacts. Please follow the directions below to upload a CSV file to a new custom group to be used for email marketing.

Please Note: Although contacts uploaded from a CSV file are stored in the Marketing Suite, this is not a CRM system, and the data is not guaranteed to be preserved. Please ensure that changes made in the system to manually uploaded contacts from a CSV are also stored elsewhere.

Creating a Custom Group

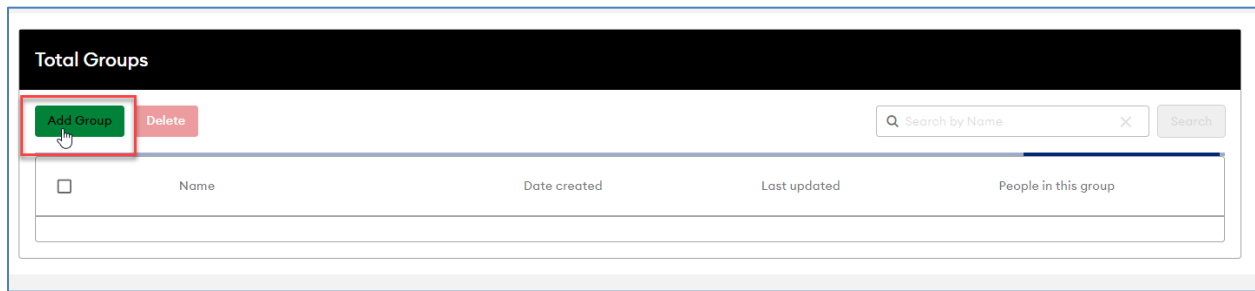
The first step to uploading a CSV excel file of contacts, is to create at least one group inside of the Marketing Suite to store these contacts in and to easily segment them out from the other contacts you have stored.

1. To create a group, click on the **Contacts** section inside of Marketing Suite, then click on **Manage Groups**.



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2. Click on **Add Group** in the top left.



3. Create a unique **Group Name** so that you know which contacts are stored in this marketing group and click **save**.

The screenshot shows the 'Add Group' modal form. It has a title 'Add Group' and a close button (X) in the top right corner. Below the title is a label 'New Group Name' and a text input field containing 'Group 1'. The input field is highlighted with a red box. At the bottom of the modal, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box and a mouse cursor is pointing at it.

4. Once created, the group can be renamed or edited as needed. Contacts can be manually added or a CSV file can be uploaded directly to the group(s).

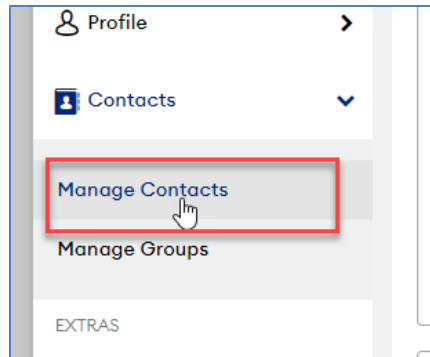
The screenshot shows the 'Edit Group' interface. At the top, there's a black header with 'Group 1 Group' in white and a settings icon (gear) in the top right corner. Below the header, there's a white bar containing a blue 'Add Contacts' button and a red 'Remove From Group' button. To the right of these buttons is a search bar with the placeholder text 'Search by Name or Email' and a 'Search' button. Below this bar is a table with columns: 'Email', 'Name', and 'Email Status'. The table is empty and has a message 'No records found.' at the bottom. The 'Add Contacts' button is highlighted with a red box and a mouse cursor is pointing at it.

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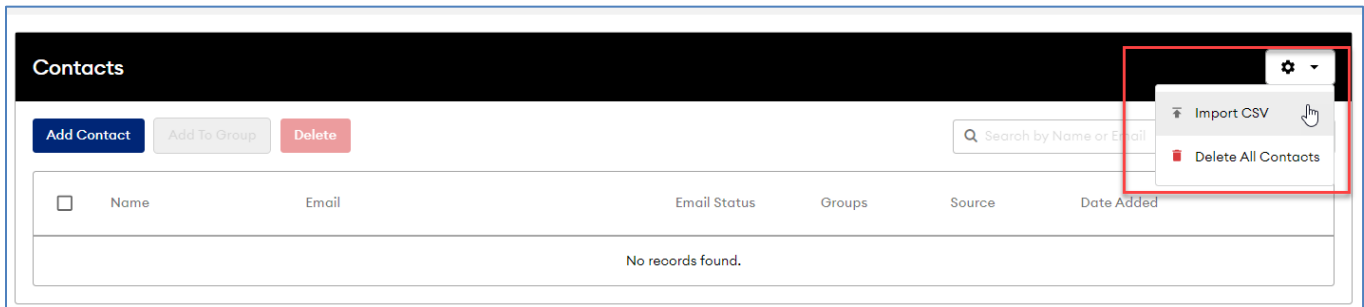
Downloading a Sample File

To upload an excel file of contacts, you will first want to download the CSV file sample to ensure you are utilizing the proper format for the upload. The system only accepts CSV files for upload and the file will need to be formatted correctly with the proper column fields.

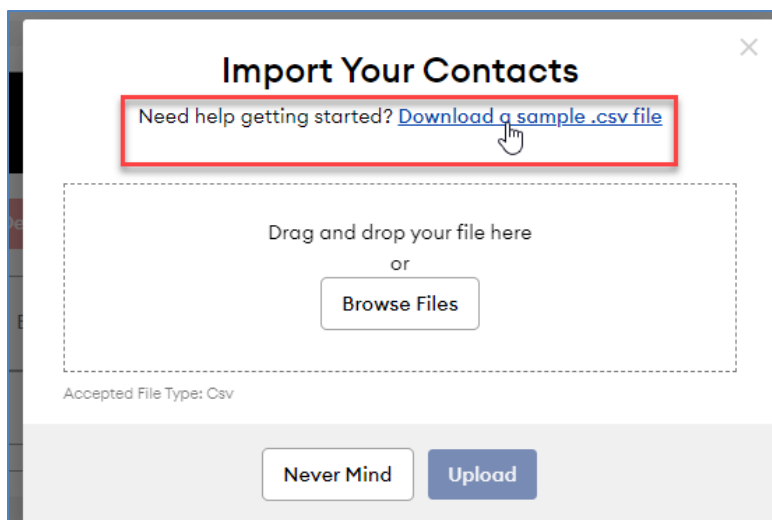
1. To download the sample CSV file, click on **Manage Contacts** under the **Contacts** section in Marketing Suite.



2. On the right hand side, click the **settings icon** and then click **Import CSV**.



3. On this screen, you can locate the sample file to download and then add your contacts to it. This will ensure that your contacts are in the proper format once you upload the CSV. Or you can click [Here](#).



Uploading a CSV-Excel List to Marketing Suite

- In the sample file you will see that there is a **Groups** Column. This is where you can denote which of your Marketing Suite groups that you want the contact to be uploaded to. We recommend adding your CSV file contacts to a newly created empty group, so you can easily locate them in the system.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	First Name	Last Name	Nickname	Gender	Birth Date	Client Anr	Marital St	Email	Phone	Address 1	Address 2	City	State	Postal Code	Groups	
2	John Henry	Irons	Steel	Male	6/1/1993	6/1/1993	Single	steel@me	555-555-5	1000 Broadway		Metropoli	KS	45678	Justice League Superhero	
3																
4																
5																

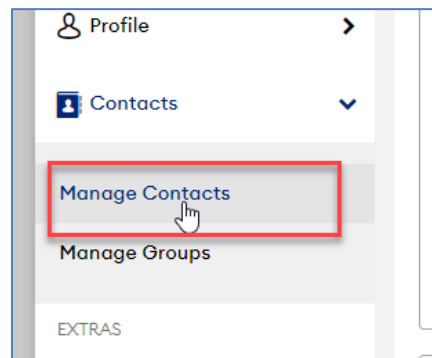
Note: A contact can be uploaded to multiple groups if entered with a | separating the groups in the column.

Uploading a CSV File

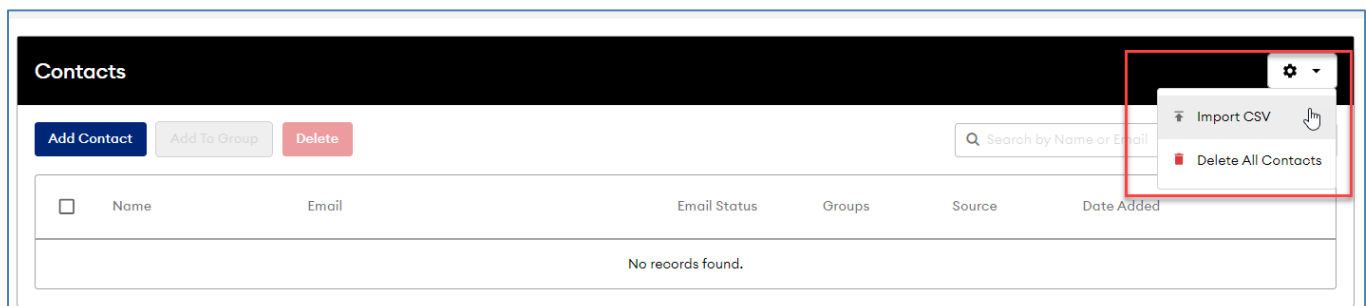
Once your contacts are added to the sample CSV file format, you are ready to upload the CSV file.

Note: It is recommended that individual csv uploads be limited to 10,000 contacts or less.

- Click on **Manage Contacts** under the **Contacts** section in Marketing Suite.

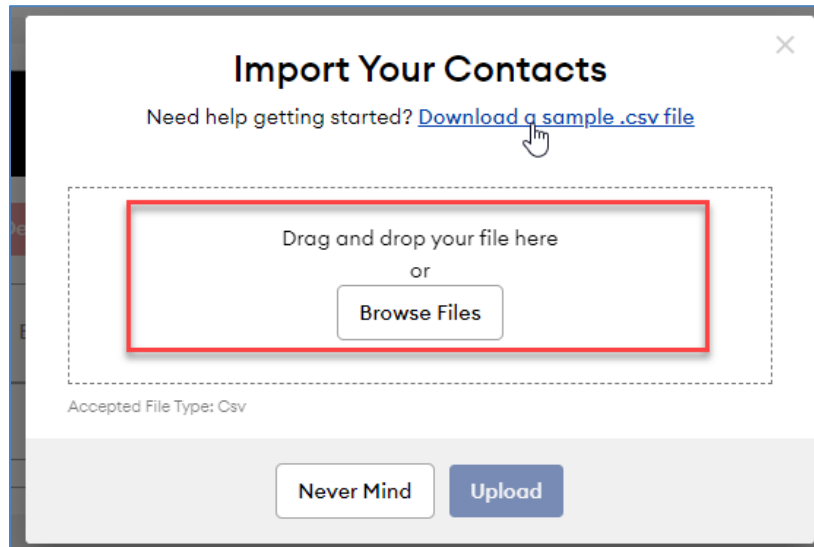


- On the right hand side, click the **settings icon** and then click **Import CSV**.

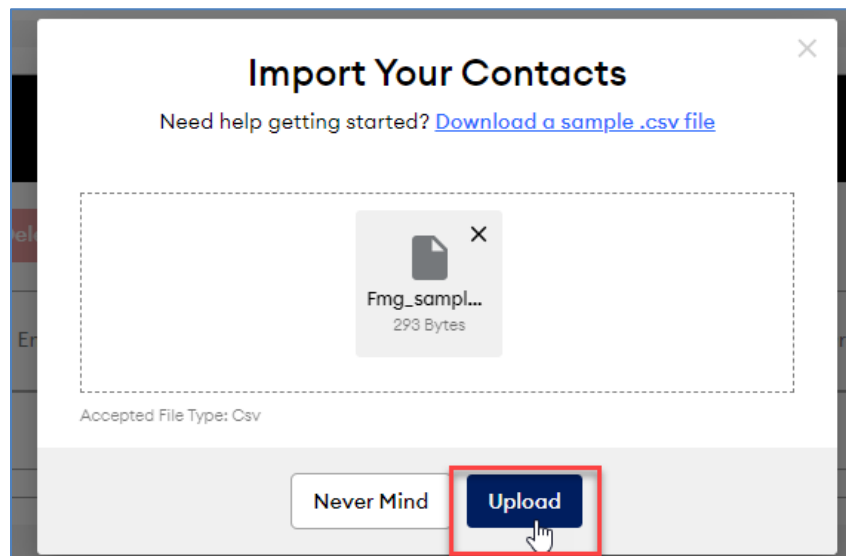


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3. Click on Browse files and select the desired CSV file to upload. OR you can drag and drop the desired file into this section.



4. Click on **Upload**.



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5. In the mapping screen, you will be able to map the column headers from the CSV file to the different available fields in Marketing Suite. Using the sample CSV file, these fields should automatically map to the correct fields. Confirm that the fields and headers line up correctly. Then press **Upload Contacts**.

☐ Import file does not have a header ☐ Show unmapped fields

CSV Header	Contact Field
First Name	First Name
Last Name	Last Name
Nickname	Nickname
Gender	Gender
Birth Date	Birth Date
Client Anniversary	Client Anniversary
Marital Status	Marital Status
Email	Email
Phone	Phone
Address 1	Address 1
Address 2	Address 2
City	City
State	State
Postal Code	Postal Code
Groups	Groups

Cancel

Upload Contacts

Preview

First Name:	John Henry
Last Name:	Irons
Nickname:	Steel
Gender:	Male
Phone:	555-555-5555
Email:	steel@metropolis.com
Birth Date:	6/1/1993
Client Anniversary:	6/1/1993
Marital Status:	Single
Groups:	Justice League, Superhero
Address 1:	1000 Broadway
Address 2:	
City:	Metropolis
State:	KS
Postal Code:	45678

6. The Import Results will be presented showing the status of each of the contacts from the import.

Import Results

Please review your import results

1 contacts were successfully updated or added.

Imported Contacts 1

Email	Name	Gender	Birth Date	Groups	Status
steel@metropolis.com	John Henry Irons	Male	05/31/1993	Justice...	Added

1-1 of 1

Note: Contacts on a manual list who are already synced in from Salesforce will not get overwritten or updated by the CSV upload.

Uploading a CSV-Excel List to Marketing Suite

Best Practices To Follow

- Use the Salesforce sync option when possible as it requires fewer manual updates to maintain a list than a CSV file.
- Follow the Sample CSV file from Marketing Suite so all fields are captured properly.
- Make sure to use groups to manage and segment out different list uploads.
- To prevent negative impacts on deliverability, keep your contact list up to date by removing bounced contacts from your Marketing Suite and CSV list.
- If you are using a list upload instead of Salesforce and receive an unsubscribe, make sure to update the Salesforce record as well to keep track of the opt outs in that system as well.
- Keep lists to 10,000 contacts or less so they can be easily managed.

Additional Resources

Onboarding Checklist: <https://micro.fmgsuite.com/equitable-checklist-persona/>

Microsite: <https://micro.fmgsuite.com/equitable/>

Resource page: <https://micro.fmgsuite.com/equitable/resources/>