Import Wizard and File Format

Click the *Import Wizard* button to open the window where you can upload a new csv/txt file from your computer. If the previewed file looks ok, then click *Start import*. You can choose between ADDING the file content into the existing list content and REPLACING the existing list content with the content in this file. *Replace* is the system default, but you can store *Add* as your default.

The contact's **phone_num** is the default **Key** field, but you can choose to use external_id as Key instead. If a**Unique Key** is required or not, is configurable (default not required).

1. If Unique key is required and an uploaded file contains duplicates, the duplicates are listed and you are not allowed to import the file.

2. If Unique key is required and you start importing a file (without duplicates) that should be added to the existing list content, and the file contains a contact with a key that already is in the existing Dialler list, the import is stopped/reversed and the duplicates are listed.

3. If Unique key is NOT required and an uploaded file contains**duplicates**, a warning is given (the duplicates are shown) and you can import the file with duplicates.

4. If Unique key is NOT required and you start importing a file (without duplicates) that should be added to the existing list content, and the file contains a contact with a Key that already is in the Dialler list (a duplicate), no warning is given and the file is imported (since you did not require a unique key).

If a contact's *phone_num* is empty or contains letters, brackets or spaces, this contact is listed as "Illegal phone number" in the Import Wizard. If you click *Start importing*, contacts with Illegal phone number are not imported. The field phone_2 can be empty or contain a phone number. **Please note** that this phone number validation is not used when files are imported using **FTP.**

- **Delimiter**: If a csv/txt file is imported and you get a red box around the header row when Delimiter = auto, try changing delimiter to ; (semicolon) or , (comma).

- **Encoding**: If the file has UTF-8 encoding, all text should be show correctly (with Encoding = (auto)). If the file doesn't have UTF-8 encoding, you can select ANSI-Latin for a Norwegian/Danish/Swedish list (due to ae/o/a and "o/"a/a) and Cyrillic (Bulgarian) for a Bulgarian list.

File format for Dialler list

- .csv or .txt files with comma, semicolon or tab as delimiter. We recommend UTF-8 encoding. If you use Microsoft Excel to save the list as a csv or txt file, please choose CSV UTF-8 (*.csv) as Type.

- If Puzzel should fetch files on Puzzel's FTP server, the file name, extension and delimiter must match the pre-defined values under accordion FTP file import. In addition, the column headers in the file must be correct. Files imported using the Import wizard can have any file name.

- The first row (header) must contain the column names: phone_num (required) and optionally var1-var30 (as many as you need) and optionally date_from, date_to, time_from, time_to, phone_2 and/or external_id. The columns can be in any order.

  - **phone_num** is the contact's primary phone number to be called (required).

  - The **optional** columns **var1-var30** can contain information about the contacts, e.g. name, age, address etc and/or a (part of a) URI. The content in one or more variable columns can be presented to the agent in a screen-pop, or a URI can be used for 'CRM pop' to open the contact in an external system.

  - If *external_id* is defined as the key, external_id is required

- Max. 10.000 records in a file manually uploaded to the Administration portal, and max 200.000 records in a file fetched on Puzzel's FTP server.

- Max 1024 characters in the values in columns var1-var30.

Template (add/remove columns if needed):

Dialler-list.csv

Field	Description
phone_num	The contact's primary phone number. **Required**. No spaces or brackets. Prefix 00 or + and country code required only for foreign numbers*. Example: +443333000066, 00443333000066 and 03333000066 will work, but not +44(0)3333000066. **Note** If you want to use the API to delete a contact (without an external_id), you can not use "+" since the [API](API) does not support it.
phone_2	Optional secondary phone number for the contact.
var1-var10	Basic variables. Max 1024 characters for each. Optional.
var11-var30	Extra variables. Max 1024 characters for each. No Filtering support. Optional.
date_from	yyyy-mm-dd, yyyy.mm.dd or yyyy/mm/dd. Earliest date to call the contact. Optional.**
date_to	yyyy-mm-dd, yyyy.mm.dd or yyyy/mm/dd. Call contact until (but not including) this date. Optional.**
time_from	hh:mm. Earliest time of day to call the contact, in local time. Optional ***
time_to	hh:mm. Latest time of day to call the contact, in local time. Optional ***
external_id	**Required only if configured that Key=external_id.**

* Outside this Puzzel customer solution's defined (main) country.

** The date format used when presenting dates in Preview list and Detailed report is yyyy-mm-dd.

*** The values for time_from and time_to are assumed to be in local time, that is, the same time zone as the Puzzel customer's configured Time zone. Please note that *time_to* is actually the latest time a contact should be put into queue, which means that a contact may be called some minutes after its *time_to* if there are lots of contacts in queue.

The field names are not CAPS sensitive.

If you configured "require unique phone_num" in your list, please note that if you have 2 contacts with the same national phone number (e.g. 987654321), and one of them includes the country code (e.g. 0047) and the other doesn't, both these contacts are seen as unique.

What if I have 2 phone numbers for one or more contacts?
If a contact has a value for phone_2 in addition to phone_num, the 1st call to this contact will be to phone_num, and if unanswered and more tries left, the 2nd call to the contact will be to phone_2, and if unanswered and more tries left, the 3rd call will be to phone_num etc. For more details, see The dialler call logic

Max list size / automatic deletion of old contacts

A Campaign's list can contain max 400.000 contacts. If you use Add instead of Replace when you upload new files, the list might become huge if you never empty the list.

To avoid having very old and not-relevant contacts in the list, we will each night, in lists with more than 5000 contacts, delete contacts that

- were imported more than 365 days ago, or

- are "finished" (answered or all call attempts are done) more than 31 days ago, or

- have a date_to more than 31 days ago