

SAM | Import contact and authorisation criteria

The contact import feature has some new, enhanced options.

As well as importing contacts you can now:

- Import values for your contact criteria
- Import values for your contact authorisations
- Bulk update your contact criteria values
- Bulk update your contact authorisation values

These new functions give you more autonomy as well as new tools to support your marketing activities and contact database qualification or expansion.

General principle

The process is the same regardless of the type of data you want to update:

1. Create a dynamic target
2. From the Import screen, click "Download import template" [DOWNLOAD IMPORT TEMPLATE](#)
3. Select the type of data you want to bulk change [contact criteria or authorisations]
4. Select the dynamic target containing the set of contacts you want to update
5. Ideally, enter an email address so that the system sends you an email containing the contact form. It's better to enter an email address, because depending on the size of your target, the import form creation process can take several minutes.

Download import template (MOSA) - Mozilla Firefox

https://mosa.val1-pos.secutex.com/tnco/samp/exportContactTemplate.htm?action=new

☆ *Download import template*

Data type *

☐ Contacts

☒ Contact criterions of target

☐ Contact autorisations of target

Send me an email at when the process is finished.

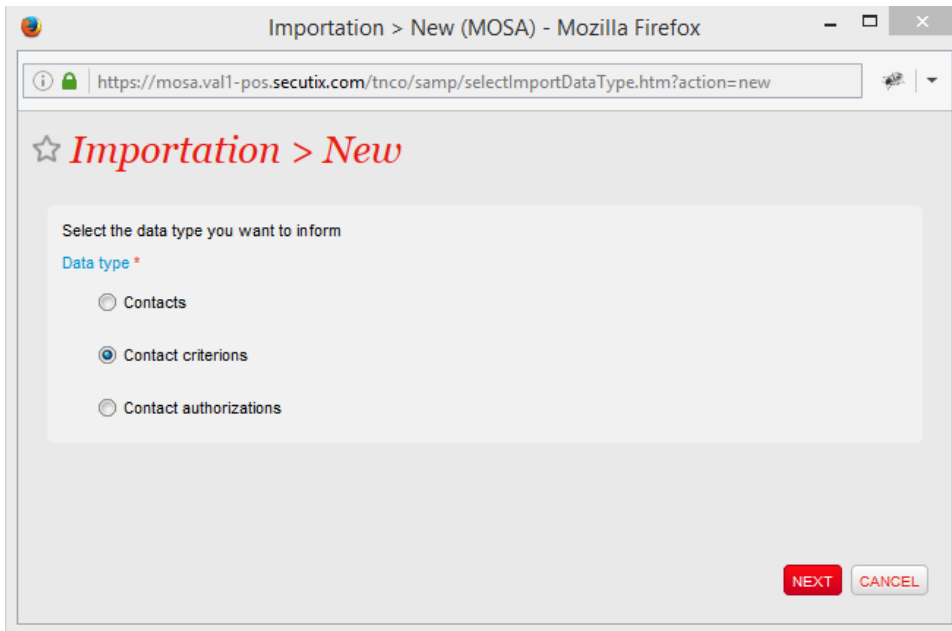
NEXT CANCEL

6. When you receive the .zip file by email, simply unzip it to access the .csv file containing the contacts. For each field in the type of data selected, the system displays one column with the prefix [old] and one with the prefix [new].
 - a. The column marked [old] contains the criterion/authorisation value at the time of the export
 - b. The column marked [new] allows you to specify the new value you require for the criterion/authorisation field in question

7. Edit the form with your required values in the fields you wish to change, then save the file

	A	B	C	D	E	F	G
1	individual	email1	organization	[old] Support billet préféré	[new] Support billet préféré	[old] Je souhaite m'inscrire a la newsletter	[new] Je souhaite m'inscrire a la newsletter
2	200	alain.szeli	16261	Thermal	PDF		TRUE
3	305		16261		Thermal		TRUE

8. From the Import screen, click "New" to start a new import and select the type of data you want to import.



Importation > New (MOSA) - Mozilla Firefox

https://mosa.val1-pos.secutix.com/tnc/samp/selectImportDataType.htm?action=new

☆ *Importation > New*

Select the data type you want to inform

Data type *

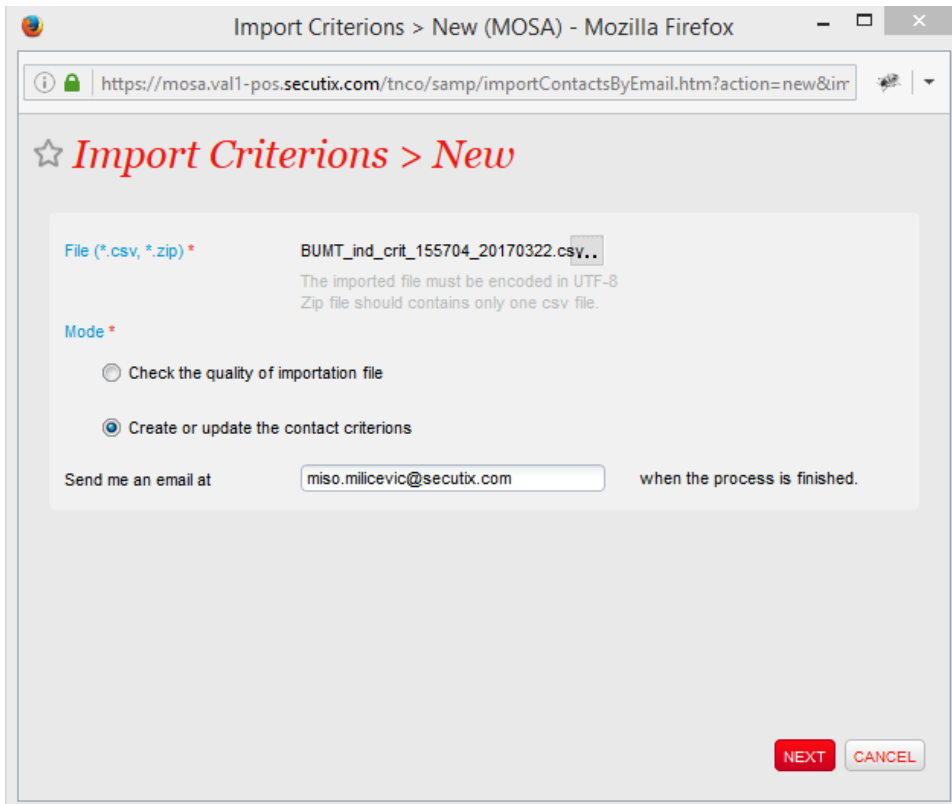
☐ Contacts

☒ Contact criterions

☐ Contact authorizations

NEXT CANCEL

9. Then select the form you've just amended and the action you wish to take: check the file quality or bulk update the data



Import Criterions > New (MOSA) - Mozilla Firefox

https://mosa.val1-pos.secutix.com/tnc/samp/importContactsByEmail.htm?action=new&im

☆ *Import Criterions > New*

File (*.csv, *.zip) *

BUMT_ind_crit_155704_20170322.csv..

The imported file must be encoded in UTF-8
Zip file should contains only one csv file.

Mode *

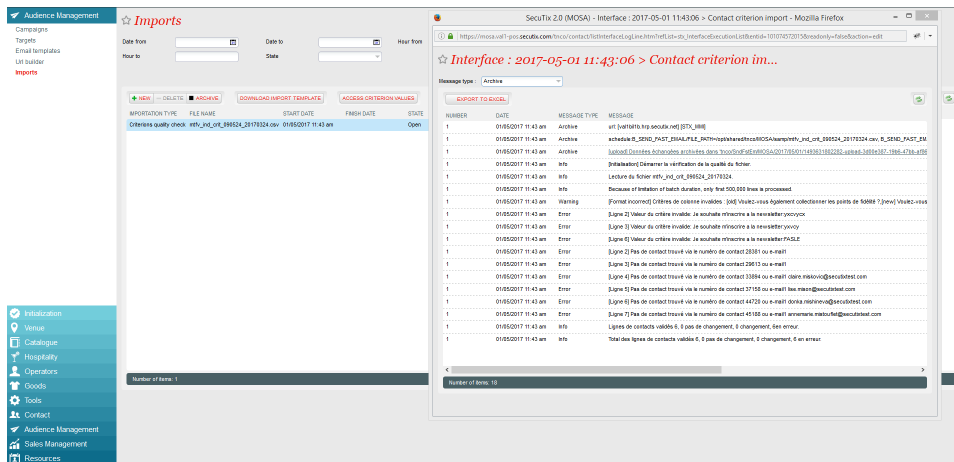
☐ Check the quality of importation file

☒ Create or update the contact criterions

Send me an email at miso.milicevic@secutix.com when the process is finished.

NEXT CANCEL

10. You can either track the import process from the Import screen itself or ask the system to email you when the import is ready.



Values you can use for contact criteria

Data updates are assisted by the concept of internal code.

It's really easy to view the internal codes that correspond to the criteria values available at your institution by clicking the "Access criterion values"

button

ACCESS CRITERION VALUES

INTERNAL NAME	CODE	CENTRALIZED	APPLY ON CONTACT	DATA TYPE
Support billet préféré	PRF_T_ME	oui	Tous	TEXTINPUT
Je souhaite m'inscrire à la newsletter	NEWSLET	non	Tous	RADIO
Restez Connecté	CONNECT	oui	Tous	TEXTINPUT
Période préférée	PRF_PERI	oui	Tous	TEXTINPUT
Nombre de sorties	OUT_NB/Y	oui	Tous	LONG
Qualification financière	QUALIFIN	oui	Tous	TEXTINPUT
TODO Hall	HALL	non	Structure	TEXTINPUT
TODO Stand	STAND	non	Structure	TEXTINPUT
Nombre d'échéances de paiement	NBECH	oui	Structure	LONG
Saisons autorisées	AUT_SEAS	oui	Structure	TEXTINPUT
Sous-groupe cible pour demandes	STG_REQ	non	Tous	LONG
Nom de logo	LOGONAME	non	Structure	TEXTINPUT
Numéro d'identification fiscale	NIF	oui	Individuel	TEXTINPUT
Code d'identification fiscale	CIF	oui	Structure	TEXTINPUT
Presse	PRESS	oui	Tous	RADIO
Protocole	PROTOCOL	oui	Tous	RADIO
Professionnel	PROFESS	oui	Tous	RADIO
Servitude	SERVITUD	oui	Tous	RADIO

Number of items: 18

Values you can use for contact authorisation

In SecuTix, authorisations are boolean fields that accept the following values: "True", "False", "Empty".

When editing the import file you can enter the following values:

Boolean values	Values supported by the import process
True	TRUE, true, T, t
False	FALSE, false, F, f
Empty	Empty