Your browser does not support HTML5 video.

In this article:

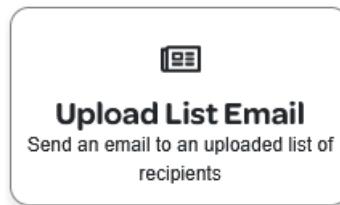- Overview
- Prepare your email with merge tags
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Overview

The **Upload List** feature allows you to load an external file of message recipients and send a message to these individuals without relying on an Audience in the CDP. Uploading a List also allows you to insert dynamic data (merge tags) and supply information that may not be traditionally accessible through the CDP.

> **Note:** Individuals in your list that aren't already in your database will **not** be added to the CDP via this feature. You must also request an **Ad Hoc Data Load** to have them permanently added to your database or add the individual to an integrated source system if you wish to see the individually formally added to the CDP.

Upload List sends are available to **Pro** and **Enterprise** plans and are disabled by default. Contact your Client Success Manager or the help desk for assistance turning this feature on.

Upload List Email
Send an email to an uploaded list of recipients

Prepare your email with merge tags

When sending to a list, you may add personalization to your message and pass-in data from the file that wouldn't normally be available in the CDP. During the sending process, you'll have the opportunity to map these merge tags to columns in your file if needed.

Merge tags can be inserted via two methods:

- Use the text formatting toolbar to click **Merge Tags**, then select **Custom** and name your merge tag and provide a default value (if applicable).
- Manually declare a merge tag by typing the merge tag syntax. Examples below:

    {{[myMergeTag]}}

    {{[myMergeTag|"defaultValue"]}}

Custom or manually-declared merge tags should have **unique names that are not shared with other fields in your CDP.** Your merge tag name should be **alphanumeric** and **contain no spaces**.

The Email Send will account for the text styling changes made in the editor, including font style, size, color, highlight, etc.

In the Editor:	Live Send:
{{[NormalText]}} {{[10pttext]}} {{[24pttext]}} {{[RedText]}} {{[RedHighlight]}}	Mainly sunny. Mainly sunny. Mainly sunny. Mainly sunny. Mainly sunny.

Send to List

When sending an "Upload List" email, you upload a CSV of contacts rather than pointing the send at an Audience or Complex Audience. This method allows you to contact individuals that may otherwise be inaccessible through the Audience Builder. This may be because:

- The recipients haven't been source from an integrated source yet.

- The message you are sending needs to be sent prior to the individual(s) reaching the CDP through an overnight load process.
- The message you are sending contains merge tag data that isn't or won't be in the CDP.

Your file name will be referenced in reporting, so please ensure that the name is descriptive enough to fit your needs.

In the email tool, List Sends are not eligible for tracking parameters.

Unlike a traditional send that can be configured to send in the future or on a recurring basis, List Sends are always sent immediately and are **never** recurring.

Email File Requirements & Validation

Example File: ascent360-upload-list-example.csv 🔗

Once uploaded, select the column in your file that should function as the **Email Recipient** column. After selecting your Email Recipient column, click **Validate** to proceed.

Your file must pass **all** of the following requirements prior to sending. Depending on the size of the file, validation may take a few minutes.

- Your file must be no more than 250,000 rows.
- Your file must be no more than 25 columns.
- All columns that have data must have a header value in the first row.
- Each header in the file must be unique.
- Your chosen Recipient Email Address column must have at least 1 valid email (an email that has an "@" and a domain + extension).

Ascent360 will validate your file against the rules above. If any of the tests above fail, you'll be asked to correct the errors before proceeding with the send.

Example Failure Report:

Validation Report for **2526guests.csv**
Raw: 340,880 rows × 26 columns   File Size: 24217.09 KB

File Validation Failed

Before proceeding with this send, please fix the following issue(s) in your file.

- This file contains more than 250,000 rows. Please reduce the number of rows to 250,000 or fewer.
- This file contains more than 25 columns. Please reduce the number of columns to 25 or fewer.
- All columns with data must have a header column name in the first row.
- Duplicate header column names are not allowed. Please ensure every header column name is unique.

↺ Start Over   Proceed with Send

If your file passes the tests above, you'll be shown a validation success report that you may review before proceeding with the send.

Example Pass Report:

Validation Report for **2526guests.csv**
Raw: 100 rows × 25 columns   File Size: 5.91 KB

File Validation Succeeded   📋 Copy

You may proceed with sending to the valid email addresses in this file.

Row Information
- Total rows uploaded: **100**
- Duplicate rows removed: **27**
- Final rows after deduplication: **73**

Email Metrics for column: A
- Valid email addresses: **28 (38%)**
- Unique valid emails: **65**
- Invalid emails: **21 (29%)**
- Missing emails: **51 (70%)**

ⓘ Rows with missing or invalid email addresses will be skipped during the email send.
  Email addresses that appear 7 or more times in the file will be skipped altogether.

⬇ Download Invalid/Skipped Records   ↺ Start Over   Proceed with Send

Report Metric	Definition	In the Example Above
Raw rows x columns	The number of rows and number of columns that were detected in the file. Row count does not include the header row (first row).	100 rows 25 columns
File Size	The size of the file as uploaded.	5.91KB
Total rows uploaded	The raw number of rows detected in the file.	100
Duplicate rows removed	Duplicate rows are removed when the data in the row is exactly the same across all columns in the file. *Email addresses can be named up to 8 times in the file as long as the data in the other columns is unique.	27

Final rows after deduplication	Rows eligible for the send after the duplicate rows are removed. This is equal to *Raw Rows - Duplicate Rows*.	73
Valid email addresses	For the selected email recipient column: The number of valid addresses, i.e. values that contain an "@" and domain + extension. Percentage: *Number of valid emails / Number of de-duped rows*	28 (38%)
Unique valid emails	For the selected email recipient column: Of the valid email addresses, the number of unique emails.	65
Invalid emails	For the selected email recipient column: The number of invalid email addresses - values that don't contain an "@" or domain + extension. Rows containing invalid emails will be skipped during the send (they would immediately produce a hard bounce). Percentage: *Number of invalid emails / Number of de-duped rows*	21 (29%)
Missing emails	For the selected email recipient column: The number of values that are missing from the column. These rows will be skipped during the send due to the lack of recipient.	51 (70%)

If the validation succeeds but detects invalid or missing emails, you may download a file containing only the invalid or missing email records. These are the records that would be skipped during the send.

As long as your selected Recipient Email Column contains at least **1 valid email**, you may choose to proceed with the send. If needed, you may choose to download the invalid & missing records and resolve those as part of a separate send.

Finally, any email address that is repeated **more than 7 times** in the Recipient Email Column will be skipped altogether during the send. This is a safeguard to prevent reputation damage resulting from sending too many emails to a single recipient at once.

Your use case may require you to send multiple different emails to the same recipient in a file. For example, you may need to send 4 emails to 1 email address, with each email containing a different Confirmation Number

Map the columns in your file to Merge Tags

Once your file has passed validation, you may proceed with mapping.

Within the mapping interface, you will associate columns from your file to merge tags within the email. If your file contains columns with data that you don't intend to use for the send, you may decide to skip the field.

Upon entering the mapping interface, the column that you previously designated as the Recipient Email Address will automatically be mapped as such (and cannot be changed from this screen). The **Preview** column will show values from the first five rows for that column.

All columns in your file must be either mapped to a merge tag or skipped in order to close the mapping interface and proceed.

Each merge tag may only be used once (you may skip as many columns as you like); if you attempt to map a merge tag that is already assigned to a different column, you will be shown a warning before deciding to switch or keep the mapping.

Map Status	File Column	Preview	Mapped To
✓	**emailaddress**	jane.taylor@example.com jane.doe@example.com jane.taylor@example.com alex.johnson@example.com john.johnson@example.com	Recipient Email Address
✓	**firstname**	Jane Jane Jane Alex John	fname

If you don't see a merge tag from the email in this list, return to your email design and double-check that it follows the expected merge tag syntax - wrapped in curly and square brackets: {{[myMergeTag]}}

SKIP FIELD

Skip this column

MERGE TAGS

Year

discount

Properties

In the Properties section, you may select how you want email permission to be evaluated for this send.

First, you must acknowledge responsibility for emailing the recipients named in the file. After acknowledgement, you may choose to either **respect** or **ignore** the permissions defined in the CDP for these individuals.

If you **respect email permissions**:

- Email addresses in the file that are explicitly unsubscribed (email permission = NO) in the CDP will **not** be sent the email.
- Email addresses in the file that are **not found** in the CDP **will** still be sent the email (Ascent360 has no record of explicit unsubscribe for this individual).

If you **ignore email permissions**:

- All email addresses found in the file will be sent the email.
- Email addresses in the file that are explicitly unsubscribed (email permission = NO) in the CDP **will** still be sent the email.

Reporting

Pass Communication 0106
Sent ⚡
Audience: 2526guests.csv
Permissions: Ignored

These **Upload List** emails will display with the status: **Sent**⚡. Emails that are sent via this method will display the name of the file that was uploaded at the time of the send and a permissions respected/ignored tag. Other reporting metrics, including opens, clicks, and unsubscribes, will be displayed as normal for these types of sends.

By default, Upload List emails will be considered "Uncategorized" Campaigns when they are sent. You can

manually re-categorize these emails as needed from the Campaigns Page.

Extra Considerations

For individuals that were in the CDP prior to the Upload List Send, the email will appear in the individual's Email History in Customer Lookup.

The Email Name will be eligible for segmentation in the Audience Selector, but will only produce individuals that were part of the CDP at time of email send (individuals that flow in via some source after the send are not retroactively identified with the Email send).

Reminder: Individuals in your list that aren't already in your database will **not** be added to the CDP via this feature. You must also request an Ad Hoc Data Load to have them permanently added to your database or add the individual to an integrated source system.