frankk.

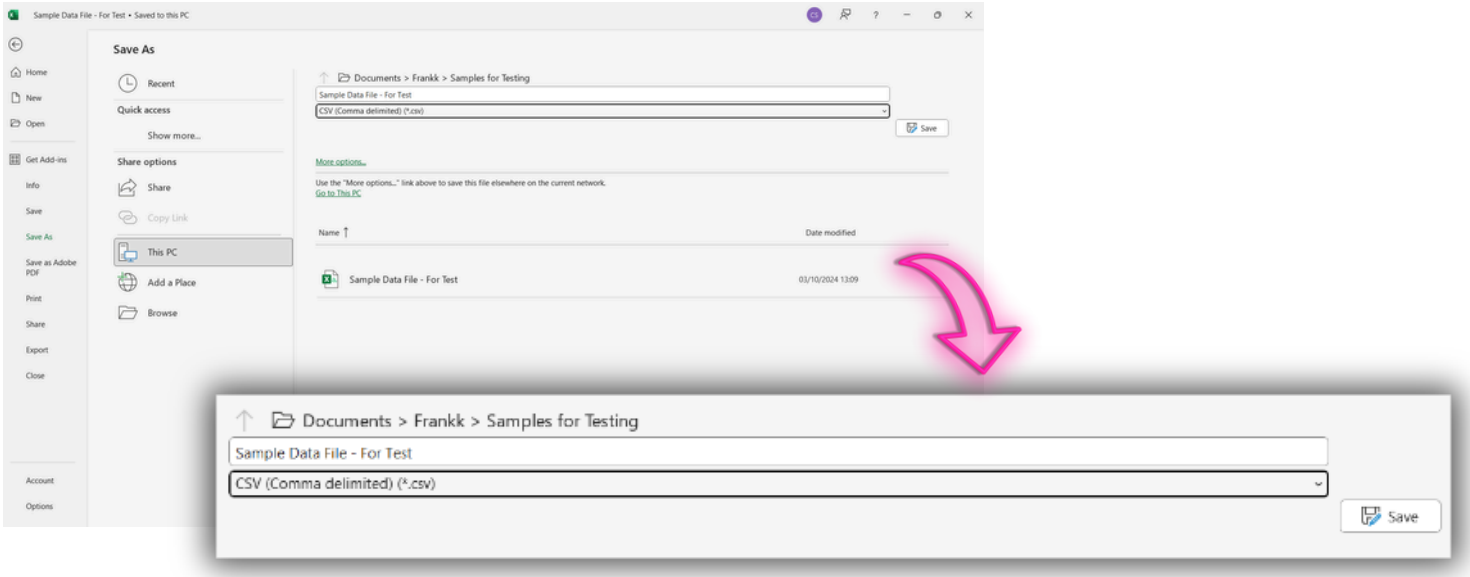
Preparing Your Mailing List For Upload

Preparing your mailing list prior to upload ensures you can set your campaign up exactly as you wish within minutes, this quick start guide will show you examples and tips to get your data formatted correctly.

The first step is to ensure that your data is within an excel file. You will only be able to upload either a .xls or .csv on the platform.

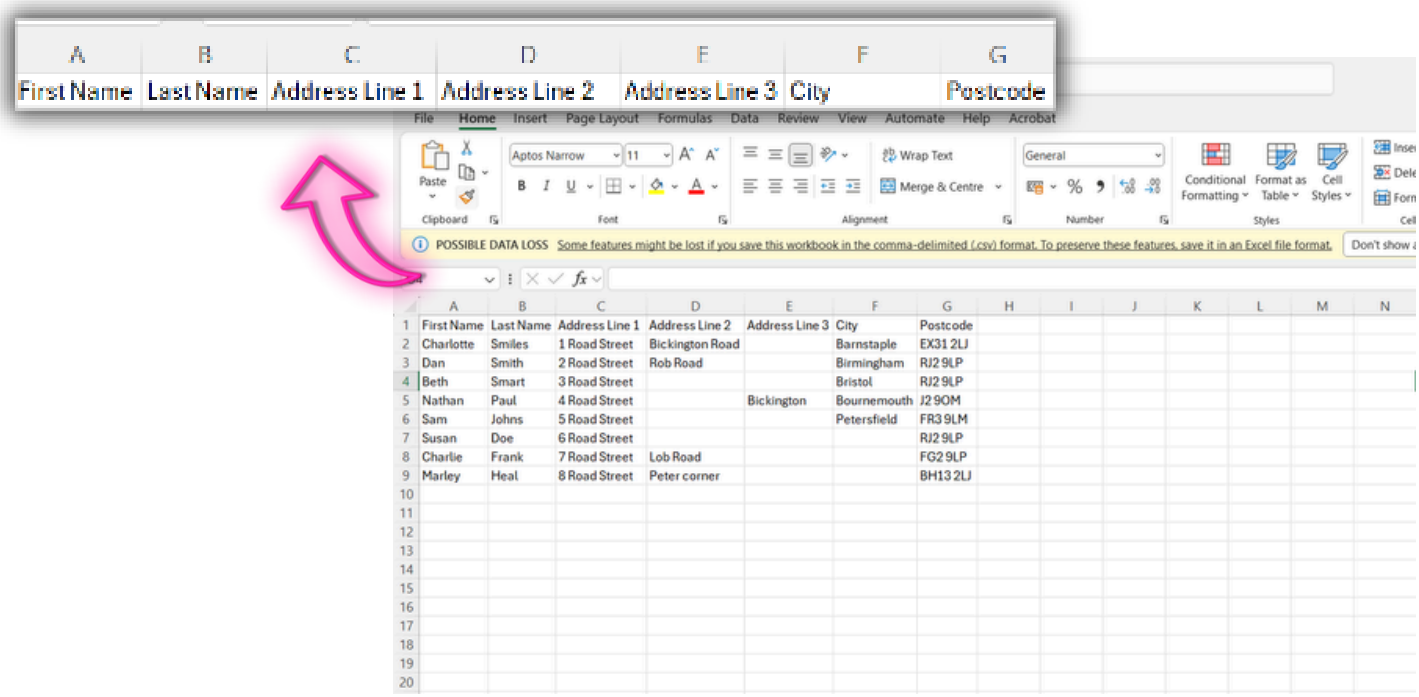
Top Tip: you should be able to download your data from your CRM in the format you choose, choose .csv and you're ahead already!

If you aren't sure what format your Excel workbook is in, you can check this when saving the file ready for uploading to your campaign, you should be able to "Save As" and on the dropdowns you will need to select either the .xls or .csv option.

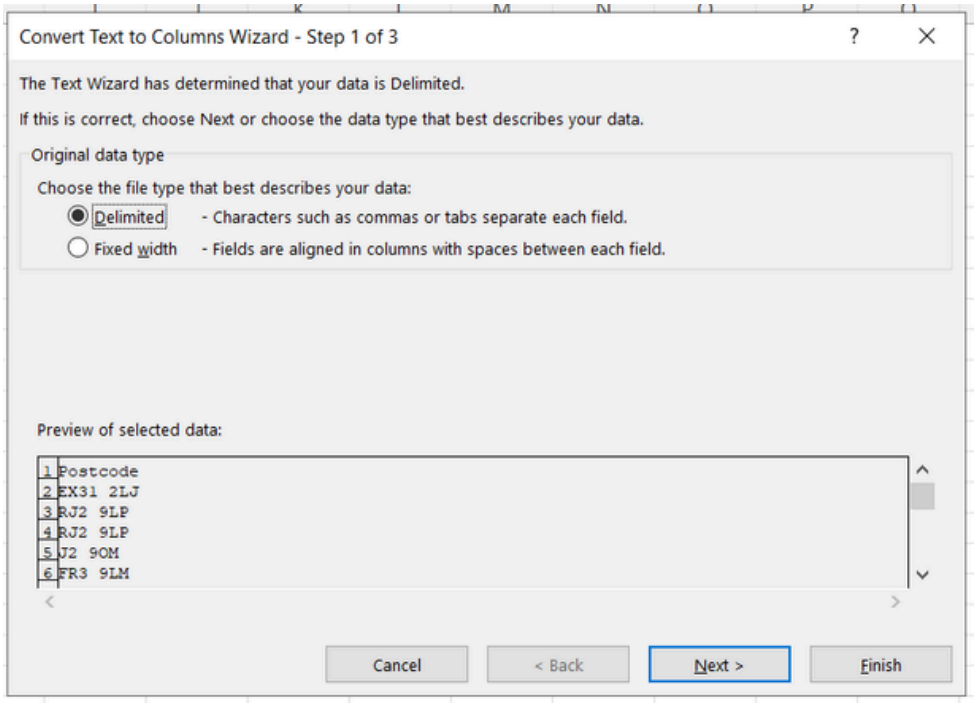


Secondly, you need to make sure that your data is formatted within separate columns ready for us to identify which column of your data is which. This means you need your addresses broken down into separate address lines and each address line in its own column.

Top Tip: You can find our "example data file" when you click on "import"



If your data is separated by commas but not in separate columns, you can do this in excel by going to “Data” > “Text To Columns” > Select Delimited > then the option of how your data is separated currently > “Finish. Your data will now be automatically separated into the columns needed for upload, just make sure to add your headings!



Once you are happy with your headings your data is now ready to be uploaded to the platform!

Top Tip: you can find the guide for Uploading and Managing Your Mailing List in our help section too!