Contact synchronization FTP API

Revisions

Revision	Author	Date	Comments
1	pmarechal	24/04/2015	Initialisation de la documentation
2	pmarechal	01/07/2015	Ajout de la possibilité de désactiver des contacts
3	pmarechal	15/11/2015	Description des deux modes d'import de contacts
4	pmarechal	18/11/2015	Utilisation d'un préfixe lors du passage des fichiers du répertoire *in* vers *on*
5	pmarechal	19/02/2016	English version
6	pmarechal	05/02/2018	How to parameters the three import modes
7	pmarechal	18/07/2019	File format when importing for multiple Digitaleo accounts
8	cdouablin	15/02/2021	Precisions for the validity of a contact

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1. Structure of the FTP deposit

The FTP API allows you to both synchronize the contacts of your CRM in Digitaleo and to retrieve the list of contacts who have reacted to your campaigns (openers, clickers, unsubscribers), in order to integrate this information into your CRM.

As such, at the root your FTP deposit, you have access to two directories

```
root
├── contacts…..Allows you to deposit files in order to synchronize the contacts
└── reporting….Allows you to Retrieve the contacts who have reacted to a campaign
```

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2. Synchronizing contacts

2.1. One directory per action

The FTP API allows for several actions:
- Importing a list of contacts;
- Deactivating/Reactivating contacts for sendings over such and such media;
- Deleting contacts.

According to the action, depositing a file is carried out in the subdirectory "in" (Cf. next paragraph) contained in a specific folder:

```
contacts
├── import …………… Allows you to import contact lists
├── optoutEMAIL……… Allows you to deactivate contacts for the EMAIL media
├── optoutSMS………… Allows you to deactivate contacts for the SMS media
├── optoutVOICE……… Allows you to deactivate contacts for the VOICE media
├── optoutVOICEMAIL....Allows you to deactivate contacts for the VOICEMAIL media
├── optinEMAIL………...Allows you to reactivate contacts for the EMAIL media
├── optinSMS…………...Allows you to reactivate contacts for the SMS media
├── optinVOICE………...Allows you to reactivate contacts for the VOICE media
├── optinVOICEMAIL…..Allows you to reactivate contacts for the VOICEMAIL media
└── delete……………….Allows you to delete contacts
```

2.2. A subdirectory per processing status of the file

For each action directory, four directories are present: in, on, ok and ko

in	This is the directory in which the files to be processed are to be deposited. This is the only directory that has write access *Read/write access*
on	This directory contains the list of files that currently being processed *Read-only access*
ok	This directory contains the list of files that have been imported correctly *Read-only access*
ko	This directory contains the list of files for which processing has failed. The main reason for a fail with processing is incorrect syntax in the CSV file. *Read-only access*

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```
contacts
├── import ............................ Allows you to import contact lists
│   ├── in
│   ├── ko
│   ├── ok
│   └── on
├── optoutEMAIL ..................... Allows you to deactivate contacts for the EMAIL media
...
```

When the deposited file passes from the directory in to on, it is renamed with a prefix that corresponds to the date the file was deposited (in *POSIX timestamp* format).

For example

```
contacts
└── import
    └── in
        └── mylist.csv
```

will become

```
contacts
└── import
    └── on
        └── 1447797847_mylist.csv
```

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2.3. Format of the files to be deposited

2.3.1. For one Digitaleo account

Regardless of the action, the file to be deposited is a CSV file for which the encoding is ISO-8859-1 and for which the line endings are in Unix format (LF).

The file can be zipped.

The size of the file (CSV or zipped) cannot exceed 20Mb.

The default separator is the semicolon although this can be configured in the Account configuration.

The expected column headers are:

```
| Civilité | Prénom | Nom | Email | Téléphone Fixe | Mobile | Fax | Adresse 1 | Adresse 2
| Code postal | Ville | Etat | Pays | Date de naissance | Société | Référence | Champ 1 |
Champ 2 | ... | Champ n |
```

The name of the fields "Champ 1" to " Champ n" can be configured at the account configuration level.

One of the three columns {Email, Fixed and Mobile Telephone} is required as well as the {Reference} field if this is your criterion for deduplicating (cf. #2.4).

For users for whom the uniqueness criterion is the customer reference, the Reference column must be completed.

Example CSV file:

```
Référence ;Civilité;Prénom;Nom;Email;"Téléphone Fixe";
123454R;M.;Pierre ;DUPONT ;pierre.dupont@mygmail.com ;0286786589
67676F6;Mme;Sylvie ;MARTIN;sylvie.martin@mygmail.com ;05.80.99.90.68
785645P;M.;Michel ;DURAND ;michel.durand@mygmail.com ;336 90 78 56 90
```

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2.3.2. For multiple Digitaleo accounts

The format is the same than for one account except one another column at the end of the file. This column is named "dispatch" and contains the reference of the account.

For example:

```
Référence ;Civilité;Prénom;Nom;Email;"Téléphone Fixe";"dispatch"
123454R;M.;Pierre ;DUPONT ;pierre.dupont@mygmail.com ;0286786589;"AO201"
67676F6;Mme;Sylvie ;MARTIN;sylvie.martin@mygmail.com ;05.80.99.90.68;"AO360"
785645P;M.;Michel ;DURAND ;michel.durand@mygmail.com ;336 90 78 56 90;"AO201"
```

The reference of the account can originate from your information system. The mapping between your reference and the Digitaleo account is built at the setup of the FTP API.

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2.4. Importing the list of contacts

2.4.1. three import modes

According to the configuration of your account, there are three possible ways of operating:

1. Mode 1 *"Systematic list creation"* - Each file deposited in the import/in directory causes the creation of a list of contacts of which the name is that of the file deposited. Even if a contact list that bears the same name already exists, a new list (with the same name) is created. This is the default mode.

2. Mode 2 *"Adding to an existing list"* - If the name of the file deposited corresponds to an existing list, the contacts will be associated with this list. If no list corresponds to the name of the file, a list is created.

3. Mode 3 *"Synchronizing an existing list"* - If the name of the file deposited corresponds to an existing list, the list will be synchronized with the file deposited: it will contain only the contacts present in the file. As in mode 2, if no list corresponds to the name of the file, a list is created.

In order to parameter one of theses import modes, you have to create a file (it might be empty) in the contacts/import directory.

1. For the mode 1 *"Systematic list creation"*, create the file '.createNewList'
2. For the mode 2 *"Adding to an existing list"*, create the file '.addToExistingList'
3. For the mode 3 *"Synchronizing an existing list"*, create the file '.syncExistingList'

If no file is present, the default mode is "*Systematic list creation*".

For example:

```
contacts/
├── import/ ………………………… Allows you to import contact lists
│   ├── .syncExistingList
│   ├── in/
│   ├── ko/
│   ├── ok/
│   └── on/
├── optoutEMAIL/ ………………… Allows you to deactivate contacts for the EMAIL media
...
```

2.4.2. Validity of a contact

For a contact to be valid, one of the following three parameters has to be defined and valid:
- Email address (Email)
- Fixed telephone number (Fixed Telephone)
- Mobile telephone number (Mobile)

Any contact whose email, mobile or phone information is not valid will be considered invalid and will not be imported.

For users for whom the uniqueness criterion is the customer reference, the Reference column must be completed.

2.4.3. Deduplicating contacts

There are several possible deduplicating criteria:
- No deduplicating
- Email, Fixed telephone number and Mobile telephone number
- Email, Fixed telephone number and Mobile telephone number, Facebook id, Twitter id, [address, town and zip code]
- Customer reference
- Email
- Mobile telephone number (mobile)
- Fixed telephone number (phone)

Each account chooses his deduplicating criterion. When a contact is created that already exists in the database (through its deduplicating criterion), the existing contact is updated with the properties of the new contact.

[1]For this uniqueness criterion, any contact whose Reference column is not defined will be considered as invalid

2.5. Deactivating/Reactivating contacts

Deactivating/Reactivating contacts is done media by media. A contact can be deactivated for a sending to the SMS media but can be valid for a sending to the VOICEMAIL media.

According to the media, it is not the same means of contact that is taken into account.

Media	Means of contact

EMAIL	Email
SMS	Mobile
VOICE	Fixed Telephone
VOICEMAIL	Mobile

2.6. Deleting contacts

Deleting contacts can be used only if a deduplicating criterion is activated on your account (either with the triplet {Email, Mobile, Fixed Telephone}, or with the Reference field).

As with the other actions, the expected file format as input is that for import as defined in section #2.3.

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3. Reporting

The reporting directory allows you to retrieve the list of contacts who have reacted to the campaigns (openers, clickers, unsubscribers) day by day.

The information is retained for 7 days.

One directory is created per day. Each day contains
- one zip per campaign in progress named <day>_<campaignId>_<campaignName>.zip
- a general zip named <day>.zip

```
reporting
├── 2015-04-27
│   ├── 2015-04-27_Daily.zip
│   ├── 2015-04-27_12345_Campaign #1.zip
│   ├── 2015-04-27_67891_Campaign #2.zip
│   └── ...
├── 2015-04-28
...
```

Each zip contains the contacts lists according to:

```
0067891_Campaign #2.zip
├── EMAIL_clicked.csv
├── EMAIL_opened.csv
├── EMAIL_optout.csv
├── SMS_optout.csv
├── VOICEMAIL_optout.csv
└── ...
```

Each file complies with the file import format (such as specified in section #2.3).

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