



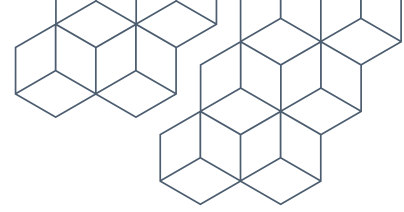
Steps for importing a list into Adestra

- 📦 File type and formatting: You will save your excel sheet as a CSV file. You will need a header row that names the columns. At a minimum you will need one column that is the email addresses. Make sure your CSV document doesn't have intermittent spacing throughout the rows that could cause an error when importing.
- 📦 Go to the Data tab in your workspace then chose to "Create new list". Give your list a name. You can choose to tag your list for easier searching later. Finally, choose your core table.
- 📦 Importing: Next tab over to the import tab of your list. Choose to select the file to be able to upload from your desktop or from your file manager (where you can pre-upload any data also). The delimiter is comma that you will choose from the drop down. Next choose the data source - your organization. Click Next.
- 📦 Here you will see the columns that are in your CSV file listed on the left. The system will do its best to guess which columns in your CSV file match the files in your core table. If the field name is grayed out on the left and showing side by side to the field name on the right - then that field is already matched. For any other fields that are left in white, you will want to drag and drop those fields to the corresponding fields on the right. Once you have matched all of your fields you can click next to import.
- 📦 You will receive an email in your inbox when the import is complete or you can click to reload the web page. You can also tab over to browse the data that was imported.

Steps for Importing a field of data into Adestra that does not match any fields in your core table

- 📦 If you have a set of data that needs to be imported into Adestra that does not match a field already there in your core table, then you can create a custom Data Table. Building a custom Data Table is useful for data that you don't need syncing nightly but that you need for personalization in an email. You can also create multiple data tables under differing names as needed.





- Under the Data tab, head over to Data Tables. Next, name your data table. Scroll to the bottom and begin to add in the fields you will need. You will give your field a name, then choose the type of data that field attribute will be (i.e. date, URL, text, etc.). Click to save.
- Once you have created the custom data table with the fields you will need, you will go through the same steps of creating a new list, importing the CSV file. On the page where the fields in the CSV file show up on the left, you will drag and drop the fields from the left to the right of all the fields that match with your core table. For the fields that match with the custom Data Table you created, choose the button for “Add Data Table” towards the bottom of the list of fields on the right. From there choose the data table you just titled. Now you will be able to drag and drop the field from the left to match the field in your data table on the right.

