

Person Import

Last Updated: Friday, November 15, 2019

You can upload custom field data about any Persons in your Mobile Database, or Persons who may join your Mobile Database at some point in the future. This allows you to keep Vibes Mobile Engagement Platform in sync with updates that happen to your Customer Relationship Management (CRM) system. We recommend that you do a one-time load of initial data, then keep systems in sync with real-time Application Program Interface (API) calls. Alternatively, you can also provide a daily or weekly file to update the Platform to changes in your system.



Note: UTF-8 or ASCII encoding for integration files is supported.

File Name

<filename>.persons

File Format

The file format is a Comma-Separated Values (CSV) file. This stores tabular data (numbers and text) in plain text, where the line of the file is a data record. Each record consists of one or more fields, separated by commas.

When specifying data for a **Date** field, the format is "YYYY-MM-DDTHH:MM:SSZ" for UTC time, or "YYYY-MM-DDTHH:MM:SS-TTTT" where *TTTT* is the time offset.

Headers

You can include the following headers in your Person Import.



Note: Using headers is entirely **optional**.

Header Name	Description
Fields	This is a comma separated list of the fields that will be in the body of the text file. If omitted, then the first row of the body must contain the field names with the same delimiter as the body.
Delimiter	The character used to delimit the columns. Defaults to a comma ",".
Multi-Select-Delimiter	The character used to delimit the multi-select values within a column. Defaults to a pipe " ".

File Body

The file body can contain the following fields as data, separated by the delimiter.



Note: The field names must be lowercase.

Field Name	Data Type	Description
person_id	Integer	The Mobile Database Person ID to include in the file body when updating the Person record.
person_key	String	The Person Key is a UUID to include in the Person Import. The <i>person_key</i> must be lowercase.
external_person_id	String	The external system's Person ID to include in the file body when updating the Person record.

mdn	String	<p>A Mobile Directory Number (mdn) is the <i>mobile_phone</i> number to include in the file body when updating the Person record.</p> <ul style="list-style-type: none"> For non-US numbers, the Mobile Directory Number (mdn) must be in E.164 format. <p>Example:</p> <pre>mdn +12295551234.</pre> <ul style="list-style-type: none"> US numbers can use the 10-digit mdn format.
custom	String	<p>A Person custom field.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p> Notes:</p> <ul style="list-style-type: none"> "Custom" is not a specific string. It means that any custom field name may be used in the data file. The header row must match the name of the custom field EXACTLY. </div>

Identifying Persons

For a particular row, only one of *person_id*, *external_person_id*, *person_key*, or *mdn* need to be specified, as these are alternate means of referencing a Person. If more than one value is specified, we will use the value with the highest precedence. The precedence order is shown in the table above.

Data

- Data in the file will override existing data in the Platform.
- The header row must match the name of the custom field **EXACTLY**.

Single and Multi-Select Fields

- For single and multi-select fields, the "option key" should be specified, not the value or ID. **Note:** The option key is case sensitive.
- For multi selects, use a "|" pipe symbol to delineate multiple values in the same field.

Error Messages

The following tables show the error codes that can occur when importing a file.

Row-level Errors

Error Class	Error Message	Description
MobilePhoneErrors::InvalidMDNFormat		The <i>mdn</i> is incorrectly formatted. It should be an E.164 <i>mdn</i> .
PersonErrors::CustomFieldNotFound	Custom field not found	There is a custom field column in the file that doesn't map to a valid custom field.
PersonErrors::InvalidSelectCustomFieldValue	Custom field value is incompatible with the field's character set	The value for a string custom field contains characters outside the custom field's character set.
PersonErrors::InvalidSelectCustomFieldValue	Invalid custom field value	The value for a single-select or multi-select custom field in this row is not valid.
PersonErrors::PersonNotFound	Person not found	The given <i>person_id</i> or <i>person_key</i> doesn't point to an actual Person.
PersonErrors::MobilePhoneAlreadyAssigned	Mobile Phone Already Assigned	The <i>mdn</i> is already associated with an existing person.
PersonErrors::InvalidPersonID	Invalid <i>person_id</i>	The <i>person_id</i> is incorrectly formatted.
PersonErrors::MdnChangeNotAllowed	mdn change not allowed	The Person in this row already has an <i>mdn</i> .
PersonErrors::PersonCreateRequiresDeviceOrExternalPersonId	Creating a Person requires a device or an external person id	The row doesn't contain a value needed to create a Person. It is missing either a <i>mdn</i> , <i>vibes_device_id</i> , or <i>external_person_id</i> .

PG::UniqueViolation	duplicate key value violates unique constraint	The <i>external_person_id</i> is already assigned to an existing person
CarrierLookupService::TransientLookupFailureError		A temporary issue with the carrier lookup service prevented the row from being processed. Please try again later.
CarrierLookupService::PermanentLookupFailureError		The <i>mdn</i> supplied is not a valid mobile phone active on a valid carrier.

File-level Errors

Error Class	Error Message	Description
PersonErrors::InvalidImportFileFormat	Couldn't find a person_id, external_person_id, mdn, or vives_device_id field	There is not a column in the file that identifies a Person. None of following fields are present: person_id, external_person_id, mdn, or vives_device_id field

Common Errors

The following errors can occur in imports of all file types.

File-level Errors

Error Class	Error Message	Description
TenantEngine::SchemaErrors::InvalidSchemaNameError	Schema name for company <company_id> (is null was not found)	The company that the file is target for is not set up in MobileDB, or there was some other system level error.

Example File

file name: customer_test.persons
<pre> person_id,gender,first_name 56451,M,Sam 699554,F,Dianne 65234,F,Amy </pre>

See the attached files for additional examples of Person Import files.

File	Modified 
File import_data_by_mdn.persons	Jun 06, 2018 by dean.lappi
File import_data_by_person_id.persons	Jun 06, 2018 by dean.lappi
File import_data.persons	Dec 19, 2018 by dean.lappi
File multi_select.persons	Jan 07, 2019 by Sam Benediktson

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