

# Data management

With these functions data management in platform SerwerSMS is very simple. Import, export, grouping help to manage campaigns and management of bulk SMS. It is also possible to manage data that arise during the implementation of message sending. It is easy to export from the system e.g. reports and incoming messages.

## Contacts

Contacts that is stored database in SerwerSMS platform available from any place at any time where the only access is to a computer with Internet connection. All contacts of course can be grouped in any method and in accordance with the needs posed by the SMS campaign.

### The basic information in contact is the number

In system the most important is the phone number or a column of A (first column in Excel). Other contacts are primarily used for personalization and include several standard fields that can be used not necessarily for the data specified by label. E-mail address, name, surname, company, etc. can be used as another variable such as the value of amount or percentage. In addition, there are several fields other than those specified in which you can create labels and to store there data that can be used in any method such as personalizing the dispatch.

### Fields available in contacts

- Telephone (import column A personalization parameter #TELEFON#)
- E-mail (import column B personalization parameter #EMAIL#)
- Name (import column C personalization parameter #IMIE#)
- Surname (import column D personalization parameter #NAZWISKO#)
- Company (import column E personalization parameter #FIRMA#)
- tax ID (import column F personalization parameter #NIP#)
- Address (import column G personalization parameter #ADRES#)
- City (import column H personalization parameter #MIASTO#)
- Description (import column I personalization parameter #OPIS#)
- Additional field 1: (import column J personalization parameter #POLE1#)
- Additional field 2: (import column K personalization parameter #POLE2#)
- Additional field 3: (import column L personalization parameter #POLE3#)
- Additional field 4: (import column M personalization parameter #POLE4#)
- Additional field 5: (import column N personalization parameter #POLE5#)

### Explanation column and personalization

- column of import - i.e. the place of ordering the variable defined during the import, which causes the correct insertion in SerwerSMS platform.
- parameter of personalization - i.e. characters sequence that cause downloading of the variable during the personalized dispatch.

# Groups

Grouping contacts allows you to maintain order and clarify data in SerwerSMS platform. Contact groups can be described according to their own scheme and based on its own nomenclature.

## Grouping data

The platform has a section where you can freely create, modify and delete contact groups. All data that is imported to platform can be ordered by their target groups: women, men, new customer, regular customer, etc..

## The usage

Groups except from that they give the possibility to organize data, they can be used in many other functions available on platform. With the precise arrangement of groups many functions will interact with the data and allow for convenient organizing the campaign.

## Import data from files: CSV, TXT, XLS, XLSX, ODS

Import from file with special format it's a function which allows you to add quickly your own data (contacts and contents) to SerwerSMS platform.

## Data import in universal format

The platform allows you to import data in the most universal format which is a CSV file. This is a text file where the separator of data may be a comma, semicolon or special character of your choice. Own data can be easily prepared with other software such as the popular Excel spreadsheet from MS Office (in programmes such as CRM, ERP) save it as a CSV file and with a single click add contacts to the base of SerwerSMS platform. Even if the database contains huge amount of records, thanks to the CSV import function you do not need to type them manually.

## Example of correct CSV file structure

CSV file with multi-column data:

```
Telephone;email;Name;Surname;Company;TaxID;Address;City;Description
```

```
Telephone;email;Name;Surname;Company;TaxID;Address;City;Description
```

CSV file with single-column data:

```
Telephone
```

```
Telephone
```

```
Telephone
```

## Export data to CSV or PDF file

Export to CSV file (Comma Separated Values) or PDF file is a function that allows you to download quickly all data

that have been created or imported when using SerwerSMS platform.

## Export data in universal format

The system allows you to export data in the most universal format which is a CSV file. This is a text file where the separator of data may be a comma, semicolon or special character of your choice. This ensures that all data can be easily processed in other software such as the popular Excel spreadsheet from MS Office. The file can be processed also in programme such as OpenOffice or in any programme which supports the CSV format.

## All data

Export applies to all data which arise as a result of using the system such as:

- sent messages,
- received messages,
- unsent messages,
- contacts,
- reports.