

## Considerations when importing subscribers from another ...

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Here's an outline of considerations when importing subscribers from another CRM:

### General Migration Strategy

When migrating to Nanacast from another platform, there's a few strategy options to consider for your existing subscriber base on your previous platform:

- 1 - Leave existing subscribers on the old platform, add all new subscribers via Nanacast
- 2 - Import subscriber list to Nanacast, provide incentives for existing subscribers to migrate (i.e. bonuses, discount coupons, and/or scheduled shutdown of old platform) to manage billing and content via Nanacast
- 3 - PayPal manual maintenance: Migrate subscribers paying via PayPal to Nanacast for content management, but let recurring billing continue to be handled by PayPal. Monitor client subscriber status in PayPal (subscribed/unsubscribed) and manually maintain client subscriber status in Nanacast based on subscriber status in PayPal.

### Importing Subscribers:

First, obviously, you've got to have the membership created in Nanacast. Second, you'll need a properly formatted export file from your CRM with subscriber data.

The following knowledgebase article is a basic outline of the import process in general (disregard any specific references to our Memberlock plugin if they don't apply to your scenario):

[http://www.nanacast.com/support/index.php?\\_m=knowledgebase&\\_a=viewarticle&kbarticleid=170](http://www.nanacast.com/support/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=170)

### Export/Import file format:

You'll want a header row with all your data columns in it, and one row of data for each subscriber. In addition to any Custom Fields you have set on the Notifications/Custom Fields page of your membership, you can set the column names to match any of the following applicable supported fields:

First Name

Last Name

Email

Next Billing Date (Must be YYYY-MM-DD)

Effective Start Date For Content Delivery (Must be YYYY-MM-DD)

Billing Amount (Ex: 11.95)

Billing Interval in Days (Ex: 30)

Installments Needed (Enter 0 if never-ending)  
Recurring Affiliate Commission (Ex: 5.35)  
Recurring 2-Tier Affiliate Commission (Ex: 5.35)  
Nanacast.com Affiliate ID  
2-Tier Nanacast.com Affiliate ID  
Credit Card Number  
Credit Card Expiration Date (Must be YYYYMM)  
Billing First Name  
Billing Last Name  
Billing Address  
Billing City  
Billing State/Province  
Billing Zip/Postal Code  
Billing Country  
Billing Phone  
Shipping Method at Checkout  
Shipping Method for Recurring Shipments

Custom Fields: Add any custom fields on the Notifications/Custom fields page of the membership first before the import, and then your custom field name will be included in the list of supported fields on the "Import Clients Step 2" page of the import process.

Once you've got your membership and your properly formatted file created, you're ready to import. In the Overview menu for the membership, in the Members area, you'll see an "Import" link, which will take you to the import clients page:

Here, you can import a CSV/XLS formatted file with your subscriber data:

Click "Choose File" button. Browse for your exported subscriber data file in the location you saved it, and select file.

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Once the file is uploaded, the file name will show. Once the file name is showing, click the "Import Clients" buttonÂ

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In the second step, the form data fields already captured for subscribers will show as selected in the "Import To:" column. Match up any applicable data columns from your file with the supported Nanacast.com data fields.

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For the "Do Not Import First Row" option if your subscriber export files contains header row information as recommended, checking this option is recommended.Â  
Select any other options desired. Click the "Finish Import" button

The results of the import will be displayed, along with any errors.

#### Billing:

If your strategy is to migrate clients to paying via credit card on Nanacast, you'd want to be sure that your export/import file includes the fields 'Next Billing Date', 'Billing Amount', 'Billing Interval in Days' and 'Installments Needed'. This will cause the system to attempt a billing on the designated 'Next Billing Date' for each client. **IMPORTANT:** You will also need to import a credit card number and expiration date-- If you have your clients' actual credit card data, include that here. If you don't, you can enter bogus credit card number and expiration date, BUT IT MUST follow the correct format for the system to include it in the import and maintain the billing dates, interval, amount, etc. (see the following for credit card formats: <http://www.merriampark.com/anatomycc.htm>)

By having credit card information in the system that is properly formatted for import, but is deliberately invalid, the system will fail in the billing attempt and send a notification email to the client's email address... This is the desired result, so that the client will be prompted to enter their current credit card info for future billing.

So, for this strategy, what you want to do is customize the Credit Card Declined notification email, Billing Failed Notice Credit Card Update Page, the Billing Failed Notice Credit Card Thank-You Page, etc., including your support contact info, etc., so that your clients know it is really coming from you and is not a phishing attempt. You can customize these from the Edit Pricing & Delivery page of your membership, in the Credit Card Update Page Settings area (Visible when Subscription is selected as the Payment setting, and when Credit Card is selected as the Default Ordering Method.)

Keep in mind as you're customizing the Billing Failed Notice Credit Card Update Page and Billing Failed Notice Credit Card Thank-You Page, that it will be a secure page using HTTPS, so any images would need to also use secure HTTPS hosting with a valid SSL certificate to avoid browsers warning against mixed/insecure content or security cert issues. See the following knowledgebase article on secure image hosting:

[http://www.nanacast.com/support/index.php?\\_m=knowledgebase&\\_a=viewarticle&kbarticleid=210](http://www.nanacast.com/support/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=210)

If you've got subscribers that are on different billing intervals, (i.e. 7 days, 30 days, 90 days,) it's recommended to create a membership for each interval separately and group the subscribers for each interval together in separate import files.

#### Content Delivery:

If you've got a content delivery schedule where you're releasing content on specific days, be sure to include the "Effective Start Date For Content Delivery" field in your import as per the following knowledgebase article:

[http://www.nanacast.com/support/index.php?\\_m=knowledgebase&\\_a=viewarticle&kbarticleid=121](http://www.nanacast.com/support/index.php?_m=knowledgebase&_a=viewarticle&kbarticleid=121)

This will prevent long-time subscribers from starting over at "Day 0" of the content delivery schedule.

Finally, to reiterate the recommendation in the first knowledgebase article linked above: We recommend to create a small test import file first, with just a few records (or a single record, preferably using one of your own email addresses so you can verify that the results are fit for public consumption) before you do a mass import of clients.

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