CX Contact Help

Create a Data Mapping Schema

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Create a Data Mapping Schema

> ### Important
>
> The content of this document has been moved and is no longer being updated in this location.
> For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

The data mapping feature is an alternative to using an input specification file to map contact data from an external file (input file) into CX Contact contact list fields. It eliminates the need to create and upload a detailed specification file, which is written using regular expression. Instead, all mapping can be defined in the CX Contact application.

The way you map data depends largely on the type of contact data file you're working with - whether it's a fixed position file or a delimited file.

This article explains how to create a data mapping schema for both file types and then describes how to apply the schema to a contact list being imported into CX Contact.

The page is broken down into sections:

- Define data mapping for a Fixed Position file
- Define data mapping from an imported file
- Define data mapping for a Delimited file

To get started, go to **Lists -> Data Mapping** and then select **New -> Data Mapping**.

The **New Data Mapping** page consists of two sections. On the left-hand side of the page, you'll provide key details about the contact list you're working with. On the right-hand side of the page, you'll define the mapping table for the data contained in the contact list.

Create a Data Mapping Schema for a Fixed Position File

In a fixed position file, all contact data contained in the file is output to a fixed-position field and each of these fields has a defined fixed length to determine the start and end character positions.

```
last_name       first_name      company                   client_id      other1
Smith           John            Genesys                   1000155        1000
Jones           Karen           Genesys                   1000156        2000
Doe             Jane            Genesys                   1000157        3000
```

Provide Details about the Contact List

On the left-hand side of the screen, provide key details about the contact list you're working with, as described in the table below.

Option	Description
Name	The name of the mapping schema you're creating.
Description	A description of the mapping schema.
For Import/For Export	Use **For Import**, which means the mapping schema you create applies to lists being imported into CX Contact. **For Export** is reserved for future use.
Caller ID Number	The caller ID number associated with the contact list.
File type	Options are **Fixed-length** and **Delimited**. For this task, select **Fixed-length**.
Header records	The header record count tells CX Contact where to look for the header row in a contact list that identifies the type of data stored in that column (first name, last name, phone number, etc.). By default, the count is set at 0, which is the first row of data in the header record. If you have a line space between a header row and the first row of data in the file, count that as a header row, because CX Contact will import all records below the defined header row position. In the example below, you would set the Header record count to 2, because you want to import all records starting from Row 3. System info : 10.10.16.50:8888 Date of Creation: 21/12/2018 Privalov 530-04-6211 +19256915237+16504661178 Redkin 780-89-9833 +16504661170+18129877833
Trailer record	The trailer record is often used to summarize data in a file - for example, the total number of records in the file, the total amount paid on accounts, etc. Setting the trailer record count allows CX Contact to exclude this information from being imported into the contact list. Simply specify the number of records from the bottom of the file you want to exclude.
Label set	If you select a labeling schema here, the labels defined in that labeling schema will populate in the **Label (Contact Field)** menu where you define the mapping (on the right-hand side of the screen). For

Option	Description
	more information about labeling schemas, go to the Field Labels page in this manual.
Sample File	You can import a fixed-position file that contains the contact data so that when you define the mapping, the data being mapped will display in the **Sample** field. **Important**: This option is enabled only after you define the mapping for at least one field.

Map the Data

To set up the mapping schema, click **New** or **New Multiple** and provide details about each field in your contact list, as described in the table below.

Option	Description
Type	The type of data being mapped. Currently, the **string** option is only available. All other options are reserved for future use.
Start	This is the starting position of each field within a row of data. The starting point is 0.
Length	The maximum number of characters allowed for that field.
Strict	Reserved for future use.
R/O	Reserved for future use.
Unique	Reserved for future use.
Label (Contact Field)	If you selected a labeling schema from the Label Set menu, the defined labels in that schema will populate here.

Define Data Mapping from an Imported File

When working with Data Mapping, you can import a Data Mapping file from a *.json export file.

To import a Data Mapping file, go to **Lists -> Data Mapping** and then select **Import** from the top right corner of the Data Mapping list. Select the relevant .json file and click **Import**. A new Data Mapping page appears and all of its properties are populated with data from the imported Data Mapping file.

You can edit the imported file before you click **Save** or **Save As**.
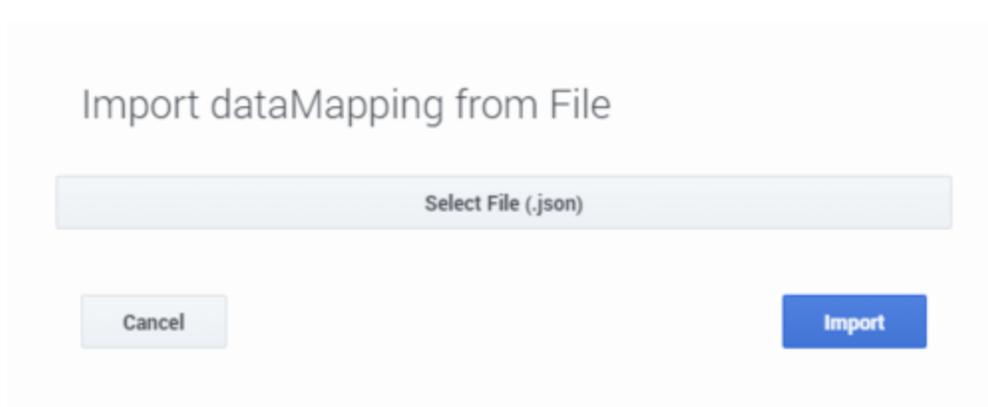
Create a Data Mapping Schema for a Delimited File

In a delimited file, columns are not confined to a pre-defined maximum length. Each record is one continuous line in the text file, with each field separated by a delimiter, such as a comma or a pipe.

```
last_name,first_name,company,client_id,other1
Smith,John,Genesys,1000155,1000
Jones,Karen,Genesys,1000156,2000
Doe,Jane,Genesys,1000157,3000
```

Provide Details about the Contact List

On the left-hand side of the screen, provide key details about the contact list you're working with, as described in the table below.

Option	Description
Name	The name of the mapping schema you're creating.
Description	A description of the mapping schema.
For Import/For Export	Use **For Import**, which means the mapping schema you create applies to lists being imported into CX Contact. **For Export** is reserved for future use.
Caller ID Number	The caller ID number associated with the contact list.
File type	Options are **Fixed-length** and **Delimited**. For this task, select **Delimited**.
Delimiter	Select the delimiter used in your contact list. Options are as

Option	Description
	follows: • Comma • Colon • Semicolon • Tab • Pipe • Custom - Specify a delimiter
Header records	A header record is the header row in a contact list that identifies the type of data stored in that column (firstName, lastName, etc). If you have a line space between a header row and the first row of data in the file, count that as a header row.
Trailer record	The trailer record is often used to summarize data in a file - for example, the total number of records in the file, the total amount paid on accounts, etc. Setting the trailer record count allows CX Contact to exclude this information from being imported into the contact list. Simply specify the number of records from the bottom of the file you want to exclude.
Use Header Record #	If your contact list has at least one header row, you must specify the line number in your contact list that contains the field headers (firstName, lastName, Device1, etc). For example, if you have three header rows, and your field headers are on the second header row, specify 2 in the **Use Header Record #** menu.
Select fields using	This allows you to map the fields in your contact list either by the contact list **Field Name** or the contact list **Field Number**. If you do not have a header row in your contact list, your only option here is to map by **Field Number**.
Label set	If you select a Label schema here, the labels defined in that labeling schema will populate in the Label (Contact Field) menu where you define the mapping (on the right-hand side of the screen). For more information about labeling schemas, go to the Field Labels page in this manual.
Sample File	You can import a delimited file that contains the contact data so that when you define the mapping, the data being mapped will display in the **Sample** field. **Important**: This option is enabled only after you define the mapping for at least one field.

Map the Data

To set up the mapping schema, click **New** or **New Multiple** and provide details about each field in your contact list, as described in the table below.

Notice that each field entry has an associated **Edit** (pencil) icon and **Delete** (trash can) icon so that you can easily modify or delete an entry.

Option	Description

#	This option is useful if you do not have a header row in your contact list and therefore cannot specify a field name. You simply identify the position of the data within the row of data in your contact list. The starting position in a row is 1. In the example below, the client ID is in the 4th position in each row, so you would enter a value of 4 in this field to map the client ID data.
	
	`Smith,John,Genesys,1000155,1000`
	`Jones,Karen,Genesys,1000156,2000`
	`Doe,Jane,Genesys,1000157,3000`

Field Name in File	This option is only available if you're identifying the fields to be mapped by their field names (meaning you selected **Field Name** in the **Select fields using** menu), which means your contact list has a header row containing field names. You can use this field in conjunction with the **#** field, but only the field name is mandatory.
Type	The type of data being mapped. Options are as follows: • string • boolean • numeric • phone • email • date • currency
Strict	Reserved for future use.
R/O	Reserved for future use.
Unique	Reserved for future use.
Label (Contact Field)	If you selected a labeling schema from the Label Set menu, the defined labels in that schema will populate here.

Once the data is mapped and you saved the schema, return to the main Data Mapping page to see a summary of the schema. This page includes the following details about each data mapping schema:

• Name - The name of the mapping schema.

- Description - The description of the mapping schema.

- Type - Whether the mapping applies to lists being imported or lists being exported. For now, the only option is Import.

- File Type - Whether the mapping is for a fixed-length file or a delimited file.

- Last Modified Date - The date the schema was last modified

- Created Date - The date the schema was created.

- Actions - Use this menu to do any of the following:

    - Edit - Click the pencil icon to open and edit the mapping schema.

    - Delete - Click the trash can icon to delete the mapping schema.

    - Duplicate - Click the document icon to duplicate the mapping schema. The new mapping schema will inherit all the properties from the original mapping schema.

Apply a Data Mapping Schema to a Contact List

When you upload a new contact list or edit an existing list, you can apply a data mapping schema to the list via manual upload or via List Automation.

Manual Upload

On the **New List** page (or **Edit List** page), turn the **Use Specification File** to the **Off** position.

The **Select Specification File** menu changes to the **Select Data Mapping** menu, where you select the data mapping scheme you want to apply to the contact list.

For more information about contact lists, refer to the Import and Manage Contact Lists page in this manual.

List Automation Tasks

When you create a list automation task that involves a list import (import file, send campaign group, import suppression file), you can apply a data mapping schema to the list being imported.

On the New **List Automation** page (or **Edit List Automation** page), go to the **Rules** section and turn the **Use Specification File** to the **Off** position.

The **Select Specification File** menu changes to the **Select Data Mapping** menu, where you select the data mapping schema you want to apply to the contact list.

For more information about List Automation, refer to the Create and Manage List Automation Tasks page in this manual.

Related Topics

- Import and Manage Contact Lists
- Create and Manage List Automation Tasks
- Create and Manage User-Defined Field Labels
- Import Specification Files