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# File Processing Automation: Client Guide

For clients using either our 1.0 Platform or 2.0 FinText™ Platform

## Introduction

File Processing Automation (FPA) is how Solutions By Text runs automated data operations for Clients without requiring constant human input.

Typical operations include sending messages, sending messages as part of a campaign, verifying new customer phone numbers, and checking for deactivated phone numbers. Also, SBT's FPA can run regularly scheduled reports.

FPA is available on both our Legacy 1.0 and FinText 2.0 platforms. The processes for both platforms are very similar; most of the differences are in SBT's internal procedures.

## FPA Operations

### Results and Reports

FPA operations fall into two categories:

- **Results** are the output created by processing a client .csv file. Typical operations include the following:
  - *Opt-In*: Sending an opt-in compliance message to a list of customers you want to opt-in to become subscribers.
  - *Campaign*: A series of messages sent to subscribers for transactions, account maintenance, or to market a product or service.

- **Reports** are regularly scheduled, preset processes on the SBT platform which give status updates including the following:
- *Outbound Messages*: Messages sent by the Client, with data on who sent the message and to whom, when it was sent, its contents, and more.
- *Inbound Messages*: Messages received by the Client, again with data on who sent the message and to whom, when it was sent, its contents, and other relevant information.
- *Deactivation*: A check for subscribers' phone numbers which have been deactivated or ported.
- *Live Metrics Outbound*: Same as Outbound Messages above, but also includes the user name, template ID, mode of communication, message subcategory, and remarks.
- *Live Metrics Inbound*: Same as Inbound Messages above, but includes the mode of communication and message subcategory.

**Note:** Once the Client's account is active, they only need to request a regular time for reports to be sent. No .csv file need be submitted as in the Results shown above. Requests for report times can be made here: [Client Support Request Form](#)

## Setting Up FPA

SBT has dedicated support personnel including Customer Success Managers (CSMs) who assist clients to ensure successful FPA operations.

To being FPA operations, please contact your CSM or submit a [support request with SBT](#).

## Secure File Transfer Protocol

Secure File Transfer Protocol (SFTP) uses secure shell encryption to provide a high level of security for sending and receiving file transfers. SBT maintains a SFTP site to which clients can upload files for processing without the immediate attention of SBT personnel. SBT personnel create the client upload directories on the SBT SFTP site and provide login credentials for the client.

Clients must provide one or more IP addresses for their SFTP servers so SBT can whitelist them for connections to the SBT SFTP server.

After the client's file server is whitelisted, clients may begin uploading properly formatted .csv spreadsheet files for processing. The SBT platform periodically checks its SFTP server for new files and processes them automatically.

These .csv files must contain the basic information required for a successful FPA operation.



## SFTP and Encryption

Clients who need or want to submit encrypted files may use Pretty Good Privacy (PGP). Clients using PGP should contact their Customer Success Representative for instructions on implementing PGP encryption.

For background information on PGP, visit the [OpenPGP Alliance](#).

## Error Handling

The FinText and Legacy platforms handle errors in files differently. Please see our [KB article on FPA error handling](#).

## FPA Throttling (FinText only)

The FPA Throttling process splits large campaign files into smaller files for scheduled processing, improving performance and preventing inbound traffic spikes. For more information, see our KB article on FPA Throttling.

## File Names

### Legacy 1.0 Platform

- *Opt-In Input File:* {CompanyName}\_{MMDDYYYY}\_{Group OrgCode}\_optin\_{Seq}.csv
- *Campaign Input File:* {CompanyName}\_{MMDDYYYY}\_{Group OrgCode}\_campaign\_{Seq}.csv

### FinText 2.0 Platform

Files names in the FinText platform are customized for each client. Your file naming convention will be provided to you by SBT.

# File Contents



FPA files have a maximum of 70,000 messages per file. Files exceeding this limit will be placed into an error folder.

The column header names must be as shown below for the file to be processed. Improper column headers will cause processing errors.

## Legacy 1.0 Platform

Opt-In input .csv file contents:

MobileNo	FirstName	LastName	UniqueID
12145551212	John	Doe	1234567
12145551313	Jane	Doe	7654321

### Notes:

- The minimum column required in a viable Opt-In file is the *MobileNo*. All others are optional but recommended.
- Columns labeled *TIQFromDate* and *TIQToDate* may be added if TIQ Lookback is being used.
- *UniqueID* is purely variable; its format is up to the client.

Campaign Input .csv file contents:

MobileNo	FirstName	LastName	UniqueID	TemplateID	URL
12145551212	John	Doe	1234567	1	<a href="https://www.mycompany.com/">https://www.mycompany.com/</a>
19725552121	Jane	Doe	7654321	5	<a href="https://www.mycompany.com/">https://www.mycompany.com/</a>



**Notes:**

- The minimum columns required in a viable Campaign file are *MobileNo* and *TemplateID*. All others are optional but recommended.
- *UniqueID* is purely variable; its format is up to the client.

**FinText 2.0 Platform**

The SBT FinText platform supports pipes "|" and semicolons ";" as delimiters.

Opt-In input .csv file contents:

MobileNo	FirstName	LastName	UniqueID
12145551212	John	Doe	1234567
12145551313	Jane	Doe	7654321

**Notes:**

- The minimum column required in a viable Opt-In file is the *MobileNo*. All others are optional but recommended.
- Columns with *DeactFromDate* and *DeactToDate* may be added if TIQ Lookback is being used.
- A URL column may also be added if using SmartURL. This is true for both the FinText 2.0 and Legacy 1.0 platforms.
- A column labeled *SubscriptionType* may be added if the client wants to override the default opt-in method. Values may be: "Optin," "Pin," "ReservedWord," "SilentOptin."
- *UniqueID* is purely variable; its format is up to the client.

**Campaign Input .csv file contents:**

MobileNo	FirstName	LastName	UniqueID	TemplateID	URL
12145551212	John	Doe	1234567	1	https://www.mycompany.com/

19725552121	Jane	Doe	7654321	5	https://www.mycomp y.com/
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**Notes:**

- The minimum columns required in a viable Campaign file are *MobileNo* and *TemplateID*. All others are optional but recommended.
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