BBIS data source cheat sheet

The data source for your message is chosen at the template level. By selecting a data source, you will be locked into that data source for that template and subsequent messages, and will need to create a new template should the data source change. To avoid being locked in (and if you don’t care about sending to opt-ins or using merge fields), choose "none" as your default data source.

If you have sent messages with the data source you need in the past, you can either copy an old message with the appropriate data source (found in the far right column of the messages library), or create a new message and select the appropriate template.

None
Most versatile; can be used to send to a query, user-defined list, or imported list. Doesn’t support merge fields. Doesn’t send to opt-ins.

Notes about user-defined lists:
• If you’re making an ad-hoc list to send to testers or another small audience, create a user defined list.
  To edit the list, search for the list name in the list library and click “view/edit list.” Here you can add a new recipient.
• Once someone is added to a user-defined list, they can’t be deleted from it. Rather, you can go into the list and toggle on and off whom you want to receive it on a per-message basis.

Appeal
Sends to opt-ins automatically upon selection of an appeal code. Also can send to queries. Doesn’t support merge fields.

Notes about appeal lists:
• Messages using the appeal data source automatically pulls in your opt-ins, but will automatically dedup upon sending if you’re also sending to a query that contains one or more of the subscribers. To add a query, click the blue hyperlinked text to the right of the subscriber list that says “Add additional recipients.”
• If you would like to send to both a subscriber list and a query, always be sure to include both in the same message to ensure deduplication happens.

Constituent
Supports merge fields from TAS. Only sends to queries. Doesn’t send to opt-ins.

Imported list
Supports merge fields from .csv docs. Only sends to one imported list at a time. Doesn’t send to opt-ins. Doesn’t support TAS merge fields.

Notes about imported lists:
• The data (via .csv doc) must be uploaded into a BBIS list prior to creating the template. Once it exists as a list, you will select it from the data source dropdown list when creating the template.
• File must be standard .csv format, with the first row of the file containing field names. Required fields are recipient name (appears in “to” field on e-mail) and e-mail address.
• Best practice dictates that we avoid using imported lists whenever possible. When using an imported list, the communications instance is not recorded to the recipients' records. If you must send to an audience that's only available via imported list (i.e., data parameters don’t exist that can be captured by a query), a better option is to send the .csv file to 2tech@osu.edu and request that a query be built from it. The help desk will then get back to you with a query or list name. You will then send the message to a constituent list, using a none, appeal, or constituent data source template.