



FM File Exchange

This document outlines the essentials of a file exchange integration across the FM SFTP server.

File Exchange Credentials

The data exchange between Full Measure and your institution will be completed via SFTP. FM will provide the necessary credentials to access the correct directory for your school. These credentials will be provided in the following format:

- Server: *sftp.fullmeasure.io*
- Username: *yourschoolname*
- Path: */fme-sftp/yourschoolname/outgoing*
- Private Key:

```
-----BEGIN OPENSSH PRIVATE KEY-----
JEpAIBAAKCAQEApwAxcBglokJBEUsQm6hZQizAgZujH05K4dNgtPEf3KjyQ!3TY
q85UyyQNP.....wb4C7vgQqasdfs0XBCGbypu4nRT+ac8hNS/+9eKnfr#SNIJKtD7s0mO8I8
jojrZjr8yVpnp6Md5DT9MvebadMaTDQqTSOIGr6aGgllzKasdfMyHmavFxadAasdfsUcb+qmLmA
J
ufiktkcqQlaOXqIKZx9asFF2KfWlJUeetRtPS2lVYIGdJ50jkqasdfwioQ==
-----END OPENSSH PRIVATE KEY-----
```

**the private key will be sent as a link that will expire after one download*

Using these credentials a user is able to set an automated process to this location. If an automated process is not possible and a manual upload has to occur, utilizing SFTP clients like Cyberduck or Filezilla allows for an easy workflow.

File Structure

All files shared via the sftp should be in .csv format with UTF 8 encoding. The first row of each file should be headers describing the column contents of each row. It is important to keep file naming consistent when updating data. Two types of files are required to complete the integration: a *contact* file and one or more *audience* files.

Contact File

Purpose

A contact file provides FM with the needed data to create a record in the FM database. This population of records should include any contact from your CRM you want to communicate with.

Required Fields

- *first_name*: This first name of the record. [ex. Jamie]
- *last_name*: The last name of the record. [ex. Tymann]
- *mobile_phone_number*: The phone number of the record [ex. 5551115151]
- *email* : The email of a record. [ex. jamie@fullmeasure.io]



- `contact_id`: Unique string identifier that will not change [ex. Tonyfull412]

Please note: If you collect texting preference (opt-ins) for your students, there is an opportunity to use a shortcode with the FM system. A shortcode is a 5 digit number that can handle higher volume and will not be blocked by carriers. In order to map this preference to the FM database, you will need to pass the additional column "**opted_in_to_texting**" as a boolean (true/false) value in the `fullmeasure_student` file.

File Naming

This file needs to be named the following way:

- `fullmeasure_student_your_school_name.csv`

To update this file you are able to either overwrite the file or place a file following the same format with a timestamp at the end of the file name.

Audience File

Purpose

An audience file creates the necessary segmented cohort inside of the FM interface. This is the population that will be served each specific campaign experience. This file should only have **ONE COLUMN** named "`contact_id`".

Requirements

- `contact_id`: This id should match the records' id from the contact file.

File Naming

This file needs to be named the following way:

- `fullmeasure_audience_term_name_audience_name.csv`

Ex: `fullmeasure_audience_Fall_2020_accepts.csv` Please add the term name of the population you are communicating with.

