Sitecore List Manager

Please note that this hotfix provides three different fixes to help address issues when uploading lists.

Import batching (work item 114088)

Use cases:

Previously, List Manager uploaded all contacts as a single set to the Marketing Foundation BulkOperationManager. In the event of any disruption during the import process (e.g. a server restart), this was found to result in incomplete loading and a locked list.

Solution:

An improvement has been introduced to batch contacts into xDB when importing csv files.

- Default batch size is 1000 contacts, and is configurable if required.
- During testing, memory consumption during the import process has been significantly reduced.
- Import speeds have been improved.
- Import information is now logged.
- User can view progress of importing and indexing by viewing the list task page. E.g. importing 10,000 contacts may initially give a reading of "1,000 out of 4,000 contacts indexed", then upon refresh "3,000 out of 8,000 contacts indexed", etc. until all contacts are imported and indexed.
- Please note that batching of contacts will ensure a more robust import process, however events such as a server restart during importing may still result in an incomplete list.

Disabling of the list locking mechanism (work item 121177)

Use cases:

The list locking mechanism was intended to ensure that contact lists were uploaded, indexed and completed before they were available for use, for example as an email distribution list, or as a source for another contact list. It was also intended to ensure that lists could only be edited by one user at a time to avoid any concurrency issues.

Some Sitecore users may encounter scenarios where multiple changes to a list may be required in short periods of time. For example, during email dispatches where large numbers of list subscriptions or unsubscriptions happen at the same time. In such scenarios, list locking may not be appropriate and developers may prefer to disable this functionality.

For consideration when using List Manager without the list locking mechanism:

- Disabling list locking may lead to inconsistencies in the number of contacts available in a contact list or an EXM dispatch, versus the number of expected contacts, as the list locking mechanism will not be able to prevent the premature usage of a contact list.
- If the list locking mechanism is disabled, a contact list will be available to use in EXM immediately after import, even if most of the contacts have not yet been processed. This may result in an email being sent to a smaller audience than intended. In such scenarios, please check the list count in List Manager before using the list in EXM, to ensure that the list count is as expected before proceeding with an EXM dispatch.

- If the list locking mechanism is disabled, incomplete contact lists will be available to use as sources for other lists. This may result in incomplete child lists. In such scenarios, please check the list count of any source lists, to ensure that the list count is as expected before proceeding with a new list.
- If the list locking mechanism is disabled, incomplete contact lists will editable by multiple users at the same time. This will result in lists that may contain unexpected contacts, if list sources are being changed concurrently while contact associations are being written and indexed. In such scenarios, ensure that your list management processes and user groups are aligned to take into account the potential impact of concurrent edits.

Setting IdentificationLevel on imported contacts (work item 84176)

Use case:

It was found that when importing contacts, the IdentificationLevel was not set as 'known' on the imported contacts. This resulted in incorrect contact merges in scenarios where end users make themselves known on a shared device.

Please note that this discrepancy only occurs when **multiple end users imported via List Manager share the same device** (i.e. when multiple Sitecore user cookies are present in the same browser). No other data discrepancies have been observed in relation to this bug.

Effects on data:

If two contacts (e.g. "A" and "B") have been imported via List Manager and identify themselves on the site (e.g. by logging in) from a shared device, these contacts would be incorrectly merged in xDB. "A" becomes the successor contact to "B", which loses its contact data.

The list created at the time of import would however still refer to both contacts, as it was created before the merge occurred. Therefore if the list is used in an EXM dispatch, this would result in "A" receiving 2 emails, and "B" not receiving any emails.

The fix contained in this package will resolve the issue and prevent future erroneous merges from occurring between users on shared devices.

Sitecore EXM

This hotfix addresses the following issue.

Impossible to collect bounces/complaints more than one at once (work item 123990)

Use cases:

It is impossible to handle more than one bounce/complain at a time.

Solution:

The hotfix adds a new setting *EXM.CheckRecipientListsCount* to
/App_Config/Include/EmailExperience/Sitecore.EmailExperience.ContentManagement.config.
This setting should be enabled only if list locking has been disabled i.e. if the file
/App_Config/Include/ListManagement/Sitecore.ListManagement.DisableListLocking.config is enabled.

The EXM.CheckRecipientListsCount setting adds a check when you attempt to send a message.
This check will attempt to verify if the recipient lists you have included for the message have been fully processed.
Specifically it checks if the number of actual contacts on the list matches the expected number of contacts on the list.

These numbers will not align if the list is being indexed which happens when contacts have been added or removed from the list. If the numbers do not align, the following message will be shown:
"*One or more of the included lists are still in the process of being imported. If you send your email campaign now, the recipients that have not yet been imported will not receive your email campaign.*"

You can choose to continue dispatching, in which case the message will only be sent to the current contacts on the list, or you can abort and try again later.