Upload Data

► Click on top tab labeled “Your List”

► On the left bar click on the link “Import Supporter List” underneath Import Data
Manage your list of supporters

Basic Search
Standard search:
First
Name
Last
Name
Email
Phone
Street
State
Zip
Search

Search using:
Email
starts with:
Search

Advanced Search
Create New Query -->

Quick Add
Title
Select Title
First Name
Last Name
Email
Phone

Click Here to Import Data
Upload List

► Add supporters' email addresses and names in the large box at the bottom of the screen
  ▪ Separate by commas (no spaces)
  ▪ Line breaks between records
  ▪ david@radicaldesigns.org,David, Taylor

► Change the “Field Delimiter” to comma

► Optionally you can upload a spreadsheet with a list of your supporters
Add Email and Names Separated by Commas

Change to CSV
Upload- Field Matching

- Match the items that you uploaded to the fields you want them to match in the database
  - Example: David -> First Name
- Click “Submit for Upload” button
Match Fields

Upload Data

File Import -- Step 2
Delimiter: ,
Reference Source Name for this data: supporter-2006-03-10

Field Matching
Use the following drop down lists to match the data in your file with the fields in our database.

<table>
<thead>
<tr>
<th>Your first row of data</th>
<th>Database Field</th>
<th>Replacement Options, if any</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:davide@riseup.net">davide@riseup.net</a></td>
<td>Email</td>
<td>No rules</td>
</tr>
<tr>
<td>e-mail</td>
<td></td>
<td>a-&gt;y&amp;b-&gt;z.../No ','</td>
</tr>
<tr>
<td>David</td>
<td>First Name</td>
<td>No rules</td>
</tr>
<tr>
<td>Taylor</td>
<td>First Name</td>
<td>a-&gt;y&amp;b-&gt;z.../No ','</td>
</tr>
</tbody>
</table>

Supporter Groups
Add users to the following Group: None

Advanced Options
These options should only be used by advanced users who understand the consequences.
Skip lines
Skip [ ] lines.
Deduplication
Democracy in Action uses an algorithm that by default deduplicates on e-mail addresses. In almost all cases, you will want to leave this logic unchanged when doing your uploads. However, if you wish to change or disable the deduplication logic, you may do so here.
Deduplication | Enabled [ ]
Deduplication Field | (Default) [ ]

Overwrite Options
By default, a file upload is considered to be new data, and will overwrite existing data if a matching supporter is found. You can choose to override this here.
Never overwrite data in the system, even if the uploaded data is newer.
Overwrite existing data with blanks, if there are blank entries in the file.

Submit for Upload
The first few lines of the file:
davide@riseup.net,David.Taylor@riseup.net,Allen.Gunn
margot@radicaldesigns.org,Margot,Brennen
Upload - Results

► After you have finished your upload, it may take a few seconds for your data to be processed.
► Wait a few seconds and then click on “Your Import Status” on the left side bar.
► Check and see the number of supporters created and updated.
► Look at your list of supporters to make sure they uploaded correctly.
Your request for a file upload has been received. Due to potentially large files, the upload may take up to 24 hours to process, although much shorter times are common.

Upload status:

<table>
<thead>
<tr>
<th>ID</th>
<th>Date Requested</th>
<th>Date Completed</th>
<th>Supporters Created</th>
<th>Supporters Updated</th>
<th>Number of Errors</th>
<th>filename</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>2006-03-15</td>
<td>2006-03-15</td>
<td></td>
<td></td>
<td>0</td>
<td>supporter-2006-03-15</td>
</tr>
<tr>
<td>1</td>
<td>2006-03-10</td>
<td>2006-03-10</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>supporter-2006-03-10</td>
</tr>
</tbody>
</table>

Page: 1
Total: 2

Click here to Refresh
End Of Section

▶ Questions?
▶ Comments?

Thank You!

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