

**DONOR ENGAGEMENT**

# Updating the Contact Record

Bulk Upload, Editing, and Bulk Apply



# Meet your Trainer...

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Donor Engagement

EveryAction



# Agenda

1. Review Data Entry and Upload Options
2. Bulk Upload
3. Bulk Apply
4. Q&A

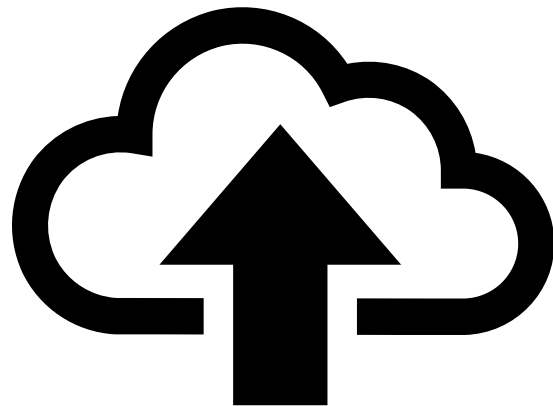


# Bulk Upload and Bulk Apply

# Data Management Options: Bulk Upload and Bulk Apply

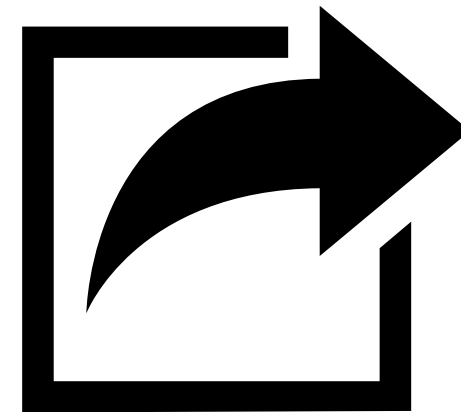
## Bulk Upload:

- A tool used to load a file of data to create new records or update existing ones



## Bulk Apply:

- Allows you to use Create a List (CAL) to segment your records and update that list with the same value on a particular field



# Bulk Upload

# Bulk Upload: Requirements and Limitations

## File Size and Formats:

You can upload your data using several formats, including Google Sheets, Microsoft Excel, and plain text files that use comma-separated (.csv) or tab-delimited (.txt) text. You can also upload using a compressed text file (.zip or .rar).


## Special Characters:

- Double quotes are ignored when parsing the data and will not be included. More specifically, they cannot be used to indicate that commas in that cell are not delimiters (for example, ["100 Main Street, Apartment 4"]; the double quotes will still be ignored, and the comma will still be treated as a delimiter.
- Single quotes are included and cause no issues if used in text fields.
- Ampersands (&) cannot be used.

**Upload a New File**

Once you've uploaded your data file, you will have a chance to review the file and map your data to VAN.

> File Requirements

File Source   Direct Upload  
 Google Sheets

Select A File No File Chosen

Import Name

First Row  First row contains column header information

# Bulk Upload:

## Common Field Requirements and Limitations

### Maximum Number of Columns:

The maximum number of columns in a spreadsheet that can be uploaded is 50.

Unique Values: Fields whose values that are typically applied to more than a couple records are limited to 60 unique values in an upload file.

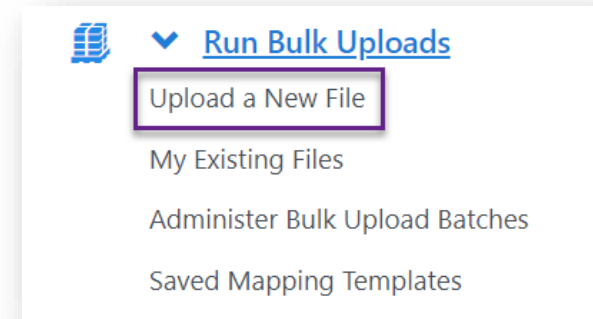
Field	Limitations
Address	Cannot be greater than 500 characters
Email	Must contain "@", and be fewer than 100 characters
Employer	Cannot be greater than 50 characters
First Name	Cannot be greater than 75 characters
Gender	Values must start with "M" or "F"
Last Name	Cannot be greater than 150 characters
Middle Name	Cannot be greater than 75 character
Occupation	Cannot be greater than 50 character
Phone Numbers	Numeric values only; limited to 10 numeric characters
State	State must be a valid US State or territory
Suffix	Cannot be greater than 5 characters
Zip Code	Numeric Values only; cannot be greater than 10 characters



# Bulk Upload to Upload Data

To upload data using the **Bulk Upload Tool**:

- Search for **Bulk Upload Wizard** in the **Sidebar** or go to the load data section on the Main Menu and under Run Bulk Uploads, click upload a new file.
- First select which type of Bulk Upload you wish to do from the options:
  - **Load Data with VAN ID**—should only be selected when updating existing records in the database and the file to be uploaded contains a column with a unique record ID
  - **Load New and/or Make Changes to Existing Contacts**—used for uploading a file of new records into the system and an attempt is made by the tool to match on existing records based on a variety of fields
  - **Load Data with Contribution ID**—use when uploading contribution data only if you have previous contributions already entered in the system



**BULK UPLOAD**

## Select Type

Select Type

Which type of bulk upload do you want to do?

Mode  Load data with

Load new and/or make changes to existing contacts

Load data with Contribution ID

Load data with Address ID

Edit Source Codes by Source Code ID

# Uploading Contact Records: Applying Data

**Mapping Template**

You are using a new mapping template.

Apply values to the record from **Summer Member Outreach.xlsx** that you want added to your database, then click **Finish**.

--Apply New Mapping--

Column from File	Applied Value	Records	
Contact Type	Contact Type: Individual	154	<a href="#">Edit</a> <a href="#">Remove</a>
Inherited from uploaded file	Inherited from uploaded file	154	<a href="#">Edit</a> <a href="#">Remove</a>

--Apply New Mapping--

Mapping	Column from File	Applied Value	Records	
Contact Type		Contact Type: Individual	9	<a href="#">Edit</a> <a href="#">Remove</a>
<i>Date of Birth</i>	<i>date</i>	<i>Inherited from uploaded file</i>	9	<a href="#">Edit</a> <a href="#">Remove</a>
VAN ID	vanid	Inherited from uploaded file	9	<a href="#">Edit</a> <a href="#">Remove</a>

Apply Activist Code

Please map the values of *activist code* to *Activist Code*

activist code	Count	Load As Activist Code
Donor	2	
Volunteer	2	Activism: Volunteer

[Prev](#) [Next](#)

**Finish Upload**

Are you sure you want to apply all data and finish this bulk upload? Be sure to double check all of your mappings before continuing.

[Cancel](#) [Finish](#)

each **xlsx** that you want added to your database, then click **Finish**.

# Updating Contact Records: Bulk Upload

Bulk Uploads are the fastest way to add new people or transactions to your database or to make changes to your existing records.

For this, we will look at the core elements of uploading contact records.

DATA ENTRY

- Bulk Upload Wizard**
- Form View
- Grid View
- Quick Mark
- Scan Bar Codes
- Script View

BULK UPLOAD

### Select Type

Select Type

Which type of bulk upload do you want to do?

Mode  Load data with

Load new and/or make changes to existing contacts

Load data with Contribution ID

BULK UPLOAD

### Upload a New File

Upload a New File

Once you've uploaded your data file, you will have a chance to review the file and map your data to VAN.

File Requirements

- It should be a plain text (either comma delimited .csv or tab delimited .txt) file, or an Excel file (.xls or .xlsx), or a Google Sheet.
  - We can only retrieve Google Sheets from your Drive, so any other file types stored in your Drive will need to be converted to a Google Sheet, or saved to your computer before uploading.
  - Google Sheets are stored at the time they are linked on this step. Any subsequent changes to a Google sheet will not be reflected in the upload.
- If the file is a Google Sheet or an Excel file (.xls or .xlsx), only the first Worksheet (tab) will be imported.
- The file can be compressed in a .tar, .gz, .zip, or .rar format as long as it meets the following conditions:
  - The source file contained within the compressed file is a plain text or Excel file.
  - The compressed file name is EXACTLY the same as the source file name, except for the extension. For example, *ActivistCode.zip* would contain the file called *ActivistCode.txt*
- The size of the uploaded file cannot exceed 20MB.
- If the file has column header information, the file should not have more than one column with the same name.

Mapping Template  None  
 Saved  
 ActBlue

File Source  Direct Upload  
 Google Sheets

Google Sheets URL\*

Import Name

First Row  First row contains column header information

# Bulk Upload Best Practices

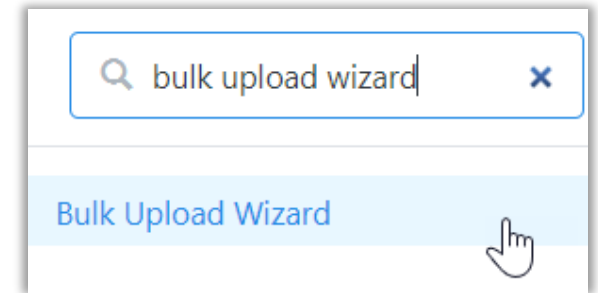
There are also some helpful hints in completing a successful Bulk Upload, such as:

- Start with a small sample file of no more than a dozen contact records
- Ensure this file sample contains all of your columns that you will be loading later to verify the data loads as you expect
- If EveryAction doesn't have a particular field you need and if your user profile has the right permissions, you can create up to 50 custom fields for your contact records
  - These will need to be created prior to your upload
- Any Activist Codes and Source Codes should also be created in the CRM in advance of your upload
- Before doing any upload that will modify existing data, we suggest exporting a backup of that data using the My List Export Tool
- For more best practices, review the video [Bulk Upload and Bulk Apply](#)

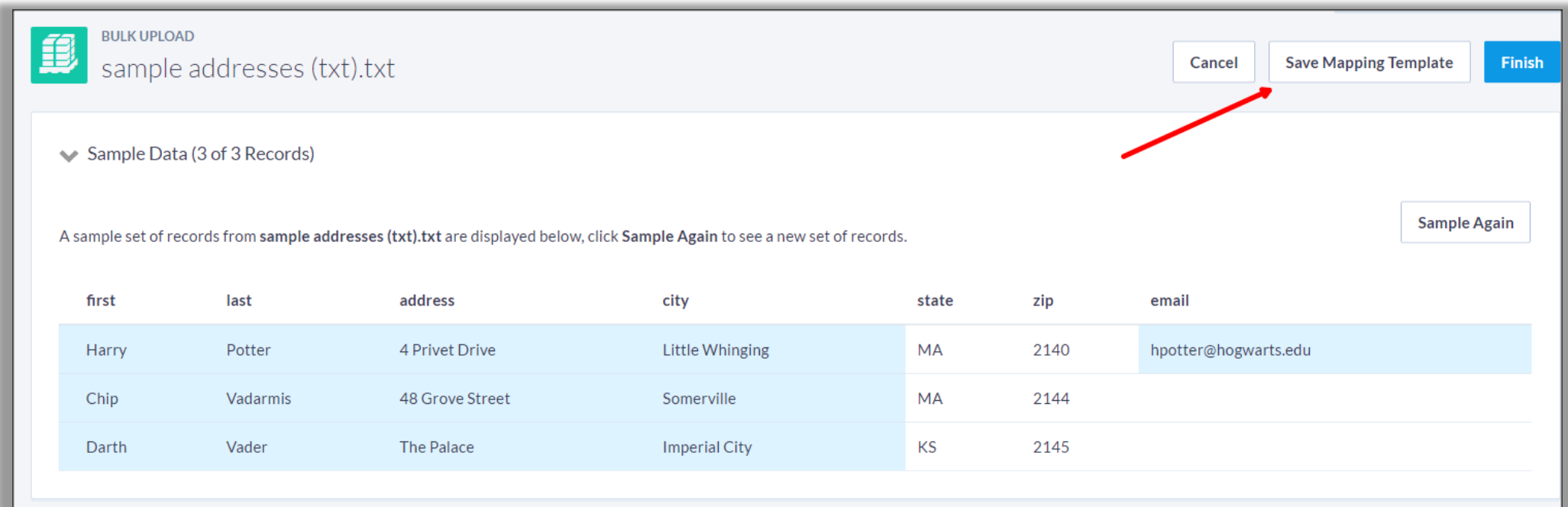
# Bulk Upload Templates

# Bulk Upload Templates

**Bulk Upload Templates** allow you to complete the mapping of a file format once and then save the mapping as a template.



To create your Bulk Upload Template, map your file using the **Bulk Upload Wizard**. Once the mapping is done, select **Save Mapping Template** in the upper right corner. Then, enter a name and save the template.

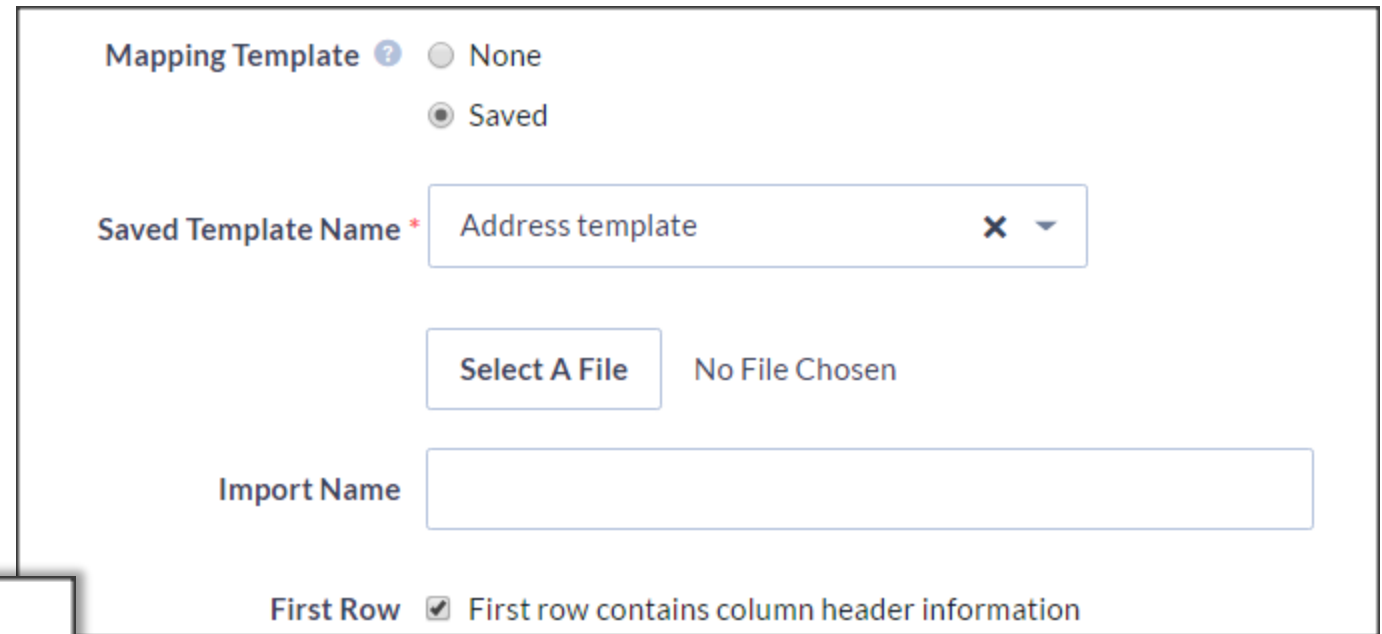


The screenshot shows the 'BULK UPLOAD' interface for a file named 'sample addresses (txt).txt'. At the top right, there are three buttons: 'Cancel', 'Save Mapping Template', and 'Finish'. A red arrow points to the 'Save Mapping Template' button. Below the buttons, there is a section titled 'Sample Data (3 of 3 Records)' with a dropdown arrow. Below this, a message states: 'A sample set of records from sample addresses (txt).txt are displayed below, click Sample Again to see a new set of records.' To the right of this message is a 'Sample Again' button. Below the message is a table with the following data:

first	last	address	city	state	zip	email
Harry	Potter	4 Privet Drive	Little Whinging	MA	2140	hpotter@hogwarts.edu
Chip	Vadarmis	48 Grove Street	Somerville	MA	2144	
Darth	Vader	The Palace	Imperial City	KS	2145	

# Using Templates

Once you have saved at least one template, it will be available to select on the **Upload Data** page when uploading future files.



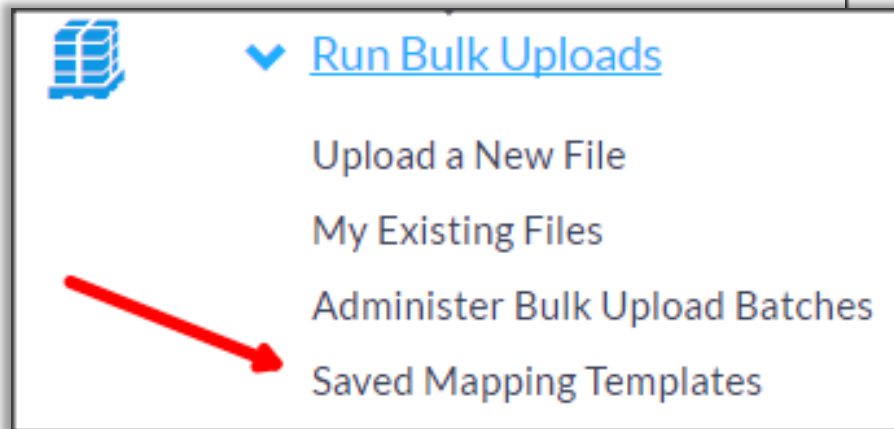
Mapping Template ?  None  
 Saved


Saved Template Name \* Address template x ▾


Select A File No File Chosen

Import Name

First Row  First row contains column header information



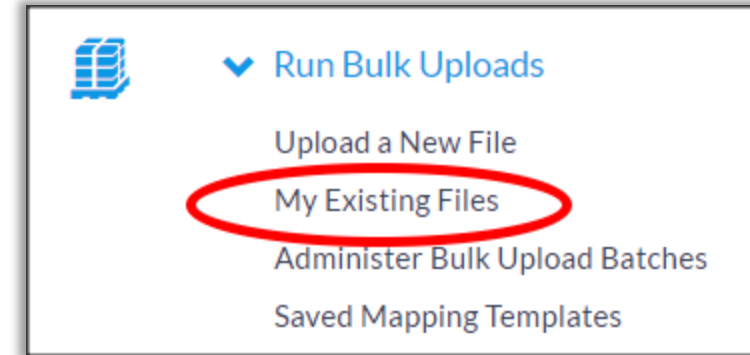
 [Run Bulk Uploads](#)

- Upload a New File
- My Existing Files
- Administer Bulk Upload Batches
-  Saved Mapping Templates

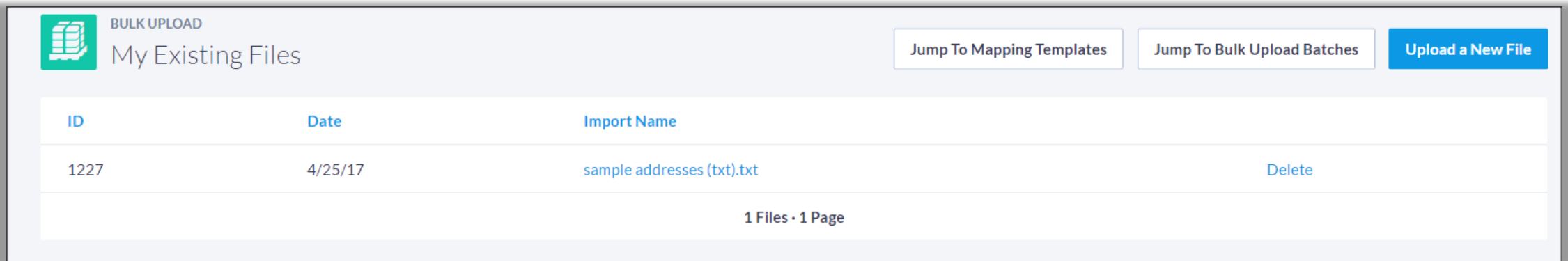
You can see your saved templates by going to **Saved Mapping Templates** from the **Sidebar** or opening **Main Menu > Load Data > Run Bulk Uploads**.

# Finding Recent Bulk Uploads

In the **Run Bulk Upload** menu, you may see **My Existing Files**, which allows you to access the most recent ten uploads they have been working on. Please note that once a bulk upload has been completed, it will no longer appear in My Existing Files.



From the **Bulk Upload Files List**, you can delete existing uploads. You can also jump to templates or batches (Administer Bulk Upload Batches) or upload a new file.



A screenshot of the "BULK UPLOAD" interface. The header shows "My Existing Files" with a folder icon. On the right, there are three buttons: "Jump To Mapping Templates", "Jump To Bulk Upload Batches", and "Upload a New File". Below is a table with columns "ID", "Date", and "Import Name". A single row is visible with ID 1227, Date 4/25/17, and Import Name "sample addresses (txt).txt". A "Delete" link is to the right of the row. At the bottom, it says "1 Files · 1 Page".

ID	Date	Import Name	
1227	4/25/17	sample addresses (txt).txt	Delete



# Create A List

# Create A List: Overview

Create a List is a powerful search tool that can help you build lists for segmentation, create searches that can be used dynamically with things like workflows, and create groups of contacts you need to apply bulk information to update their data.

The screenshot displays the 'Create A New Search' interface. On the left is a navigation menu with 'Home', 'Main Menu', 'Volunteer Management', and a 'PEOPLE' section containing 'Create a List'. The main area is titled 'CONTACTS Create A New Search' and features a 'Step 1: (Start with anyone who meets the selected criteria)' header. Below this are sections for 'FAVORITES' (with a note to click stars to move criteria to the top) and 'OTHER SEARCH CRITERIA' (listing 'Activist Codes', 'Addresses', 'Attached Files', and 'Canvass Status', each with a star icon). To the right, a 'Suppressions' panel lists rules: 'exclude Deceased', 'and include Bad Address', 'and exclude Do Not Walk', 'and exclude Do Not Call', 'and include Do Not Email', and 'and exclude Do Not Mail'. At the bottom, there are '+ Add Step' and 'Run Search' buttons, and a light blue notification box stating 'Running this search will clear your current list of 0 people.' A secondary window on the right shows a 'Preview My Results' button and a summary: '1 People', '1 Phones', '1 Doors', and '1 Mailboxes'.

# Bulk Apply

# Updating Contact Records: Bulk Apply

CONTACTS

## My List

Edit Search ▾ Load List Save List As New Search

58 Contacts    5 Home Phones    12 Preferred Phones    12 Doors    12 Mailboxes    58 Envelopes

Print Mail Merge Letters Labels Calls Export MiniVAN Counts Reports Cut Turf Split Form

Task **Bulk Apply** Map Advertising Messages Duplicates Call Time Relationsh... WealthEn...

BULK APPLY

## Your List

Finish

! Mappings must be applied to one or more records before finishing the Bulk Apply.

**Edits**

Select the edits that you would like to bulk apply to the contact records from your list, then click **Finish**.

--Apply New Mapping--

Edit Type	Record's Column	Applied Value	Records
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# Q&A

# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto:help@EveryAction.com)
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM



# Help Center Resources

- [Contact Record Overview](#)
- [Organization Contact Records](#)
- [Bulk Upload Basics](#)
- [Bulk Uploading in EveryAction Tutorial](#)
- [Use Create a List for Searching](#)





# Additional Training

- Bonterra Academy:

<https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup>

- Foundational Webinar Series
- Upcoming initiatives
- Videos in Bonterra Academy



Thank You for Attending!

