Email For Advocacy and Community Organizing: Basics, Essentials, and Best Practices

Democracy In Action: Uploading Your List

These training materials have been prepared by Aspiration in partnership with Radical Designs and ScoutSeven

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Upload Data

Click on top tab labeled "Your List"

On the left bar click on the link "Import Supporter List" underneath Import Data







Your List Email	Reports Website Templates	Configuration	
List Manager Add Supporter List or Find Supporters Manage Groups Deduplicate Interests All contact history items Unsubscribes	Basic Search Standard search:	Search using:	starts with:
Queries Image: Create a new Query Image: Run an existing Query Image: Export Data	Last Name Email Phone	Search	
Import Data Import Supporter List Your Import Status Upload request details	Click Here to Import Data		
Add Supporter First Name Last Name Email Phone	Search Advanced Search Create New Query>		
Save	- Quick Add Title Select Title ▼		
Last Modified Carlot Email blast:5 Email blast:5 Email blast:5 Email blast:5	First Name Last Name Email Phone		
		As	PIRATION



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





	EADQUARTERS	Radical Designs :rd Home FAQ Tickets Logout
Your List Email	Reports Website Templates Configuration	
ist Manager Add Supporter List or Find Supporters Manage Groups Deduplicate Interests All contact history items Unsubscribes Unsubscri	 Upload Supporter File: Step 1 of 2 To upload a file containing information about your supporters, such as names, addresses, format for this data is a simple comma-separated data file, which can be created as follo For Microsoft Excel, OpenOffice Calc Spreadsheet, and most spreadshee Open the supporter file. Select File->Save As Under the 'Save As Type:' box, choose 'Text File (Tab Delimited)' Note the directory you save the file to, and select 'Save' Using the Browse button below, navigate to the directory and select the reselect 'Continue>' and follow the instructions For basic text file Seperate each supporter into one line, and distinguish different fields by For Example: BobSmithbobsmith@smith.org703-555-1212 Save the file Using the Browse button below, navigate to the directory and select the reselect 'Continue>' and follow the instructions Alternatively you can cut and paste the contents into the box below; For Microsoft Access, OpenOffice Database, MySQL, and other database 	, email, etc., a specially formatted file is required. The accepted ws: eet applications: new '.txt' file y tabs. new '.csv' file
Your Import Status Upload request details	There are many different methods. Contact us for recommendations.	
d Supporter st Name st Name Email Phone	Filename Browse Options Field delimiter (the character between the dif Change to CSV Table to upload data to:	Tab (\t) Supporter (For a normal upload)
save st Modified	This data looks a lot like data from: (new users, just keep the default value) If the automatic field matching algorithm is hurting more than helping, click this box:	Nothing I've done before
Email blast:5 Email blast:5 Email blast:5 Email blast:5 Email blast:4 Email blast:4	Upload Data> Note: This may take a minute for larger files If you wish, you can cut and paste smaller content here, for the same processing. david@riseup.net,David,Taylor gunner@aspirationtech.org,Allen,Gunn margot@radicaldesigns.org,Margot,Brennen	d Email and Names Separated by Commas

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





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Your List Email Re	ports website rempia	Configuration		
File Import Step	2			
Delimiter: ,				
Reference Source Name for this data:	supporter-2006-03-10 11			
Field Matching				
Jse the following drop down lists to ma	tch the data in your file with the fiel	lds in our database.		
Your first row of data	Database Field	4	Replacement Opt	tions, if any
david@riseup.net	Email		No rules	a->y&b->z <i>No ','</i>
David	First Name		latch Fields	a->y&b->z <i>No ','</i>
Taylor	First Name		No rules	a->y&b->z <i>No ','</i>
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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



HEADQUARTERS

Radical Designs :re Home FAQ Tickets Logou

Your List	Email	Reports	Website	Templates	Configuration			
List Manag Add Suppo List or Find	er orter d Supporters	Your requ Due to po Uploa	est for a file tentially larg	e upload has bee ge files, the uplo	n received. ad may take up	to 24 hours to pro	ocess, although n	nuch shorter times are common.
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End Of Section

Questions?

Comments?

Thank You!

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