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Upload List



Important: Only those features that you have been granted access to will display. For access to additional features contact your system administrator.

The "**Upload List**" feature is only available as part of the List Editor function as described in the "[Create a List](#)" topic of this help guide. For information on the import of data files used to establish the contact data for your account, see the "[Data Imports](#)" topic or contact your system administrator.

Upload List allows users to upload a list in Comma Separated Values (CSV) data file format. The list contains the contact information of the recipients you wish to send your broadcast to.

This topic is useful to those who already know the minimum steps to give your list a name and description. If you would like more information on those steps, please review the "Add New List" instructions in the [Create a List](#) topic.

Uploading a list requires 3 main steps:

1. [Creating Your CSV Contact File](#)
2. [Uploading Your Saved File](#)
3. [Previewing Your Upload](#)

You can select 2 types of data to create your list:

- [Contact Data](#)
- [ID# Lookup](#) (only contacts added via the Data Import feature will have a unique ID#)



Note: If your uploaded list includes contacts that are not in your contact database, the contact info will not be added as new contacts in the contact data for your account or your **Address Book**. If you'd like to add the same contacts to another list, you will not be able to search for these contacts as they have not been added to your district account's contacts.

The **Data Import** feature adds contact data files to the district account. The import generates a unique ID# for each contact. These are the ID#s you would use if uploading a list using ID#s. For more information on this topic, click [here](#).

Step 1: Create Your .CSV File

1. Open a spreadsheet creation software (i.e. Microsoft Excel).
2. List your contact info (Last Name, First Name, Phone 1, Email 1) using a column for each field. If you're building a list using ID# Lookup, you only need to include the ID#s in the first column (information in the other columns will be ignored by the system).
3. Save your list on your desktop as a .CSV file. The upload will not work if saved as any other file type (i.e. .xlsx).

If building a list using **Contact Data**, organize contact info using 1 data field per column.

A screenshot of the Microsoft Excel interface. The 'Home' tab is selected. The ribbon shows 'Cut', 'Copy', 'Format', 'Paste', 'Calibri (Body)', '12', 'A', 'A', 'B', 'I', 'U', and 'A'. The active cell is E23. The spreadsheet shows the following data:

	A	B	C	D	E	F	G
1	Hummel	Jessica	393-252-252	jhummel@gmail.com			
2	Scott	Frank	252-345-252	frank.scott@gmail.com			
3	Lockett	Drew	242-343-235	drewL@hotmail.com			
4							

If building a list using **ID# Lookup**, list ID#s under column A of your spreadsheet. No other information is required.

A screenshot of the Microsoft Excel interface. The 'Home' tab is selected. The ribbon shows 'Paste', 'Calibri (Body)', '12', 'A', 'A', 'B', 'I', 'U', and 'A'. The active cell is F11. The spreadsheet shows the following data:

	A	B	C	D	E	F
1	107483					
2	105036					
3	108798					
4						

Step 2: Upload Your List File

1 Select your List Type

2 Click Choose File to upload your List File

3 Click Next

Your file will appear to the right of the Choose File button when successfully uploaded

Step 3: Preview Your Upload

If your file upload was successful, all of the contact info in your list will appear in the "**Upload Preview**" screen. Each column of data in the file will be shown - you may scroll the view further to the right to see more fields. Above each column, you will find a drop-down menu which you can use to assign the appropriate labels to match those in your CSV file.

Unrecognized data will be listed as **Invalid**.


Contact Data

Contact Data CSV files contain complete contact information for your message recipients, with each column containing one field. For example: Contact ID, Last Name, First Name, Phone, Email, etc.

Each column of data in the file you've selected will be shown - you may scroll the view further to the right to see more fields.

Above each column, you will find a drop-down menu which you can use to assign the appropriate labels to match those in your CSV file.

First Name	Last Name	Phone 1 (Mom's Home)	Email 1 (Primary)
Carlson	Judy	Invalid Phone: Phone 1	Invalid Email: Email 1
Hummel	Jessica	(393) 252-2526	jhummel@gmail.com
Scott	Frank	(252) 345-2522	frank.scott@gmail.com
Lockett	Drew	(242) 343-2352	drewL@hotmail.com

 **Note:** It is normal for data in columns labeled as "Phone" or "Email" to show entries with "**Invalid Phone**" or "**Invalid Email**". This is just a visual indicator of where a record does not contain a valid 10-digit phone number or a properly formatted email address. This will not prevent your list from saving properly and should not be cause for alarm.


When labeling columns, you may label those which contain unnecessary data as "**-Not Used-**". This means those columns will be ignored in your list.

After all columns are appropriately labeled, you can click the "**Refresh Mapping**" button to visually confirm the valid data.

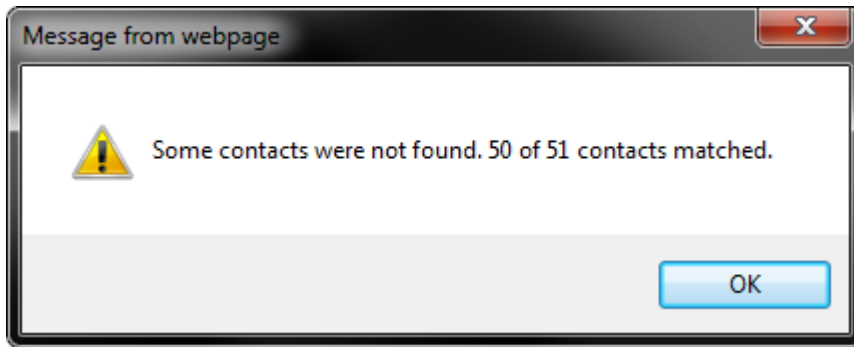
When you are sure it is correct, click  and you will be returned to the List Editor screen.

ID# Lookup

This option allows you to very quickly search your account database for specific contacts by looking them up based on their Unique ID (ie: Student ID, Guardian ID, Staff ID, etc.). If you have access to a CSV file which contains the Unique ID's of contacts you wish to include in your list, selecting the "ID# Lookup" option will allow you to find and add them to your list with just a few clicks.

 **Important Note:** The CSV file must have the unique ID#'s in the first column. No other columns of data are needed, as any columns past the first will be ignored, so the file could even contain only ID's.

After clicking "Next", you will receive a message, similar the one below, explaining how many contact records within your account database were found to be a match to the file, as well as how many were not.



It is completely normal for there to be some records which were not a match. If your file has a header row, then there will always be at least one record which was not found.

Those records in the CSV file's first column which do not contain unique ID# information that are a match to records in your accounts data imports will be listed in the "**Unmatched ID#s**" section. If your file had a header row, for example, this would be shown (see example below).

Records from the CSV upload's first column that are a match to records within your account's data imports will be displayed in the "**Matched ID#s**" section. (see example below)


Upload List: High School Band

Unmatched ID#s

ID#	Status
Student ID	### Not Found ###

Matched ID#s

ID#	First Name	Last Name	Phone Number	Email
S0013	Elizabeth	Guthrie	(314) 999-5041	
S0014	Caleb	Huggins	(314) 999-5053	
S0020	Grace	Klotthor	(314) 999-5019	
S0041	Jacob	Smith	(314) 999-5045	
S0047	Christianna	Tripe	(314) 999-5006	
S0048	Toby	Tyler	(314) 999-5009	
S0003	Max	Reins	(314) 999-5054	

When you are satisfied that the Matched ID#s returned are accurate, you should click the  button. You will be returned to the List Editor

List Add/Skip

Once you have saved the upload, a new section will appear (between "Target Recipients" and "Additional List Tools") called "**List Add/Skip**" with the following options:

- Uncheck contacts you don't want included in your list.
- Click "Remove all adds" to delete all contacts from the CSV upload from your list.
- Click the magnifying glass icon in the "Unique ID" column to view the full record of any contact.
- Change the page being viewed (as only 100 records per page are displayed at a time).

Contacts added using Additional List Tools appear in the LIST ADD/SKIP section.

Quickly delete all added contacts by clicking "Remove all adds" section.

If you only want to remove some adds, simply uncheck the box.

Click the magnifying glass to view the full record of the contact.

Click the drop-down to change the page being viewed (only 100 records per page are displayed at a time).

Click Done to return to the List Editor.

The screenshot shows the "LIST ADD/SKIP" section with a table of additions. The table has columns for "In List", "Unique ID", "First Name", and "Last Name". A single record is shown for Brian Herman with Unique ID 1334. The "In List" checkbox is checked. Above the table is a "Remove all adds" button. To the right, it says "Showing 1-1 of 1 records on 1 pages." and "Page 1" with a dropdown arrow. Below the table is the "ADDITIONAL LIST TOOLS" section with a list of tools: Enter Contacts, Open Address Book, Quick Pick, Search by Rules, and Upload List. At the bottom are "Refresh" and "Done" buttons.

Once you are satisfied with the contacts selected in the List Add/Skip section, you should either click the  button at the bottom of the List Editor or return to the help guide for "[Create a List](#)".

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