

Using the Bulk Upload Tool

Agenda

Accessing the Bulk Upload Tool

Loading your Data File

Mapping Fields and Saving
Templates

Finalizing Your Upload and the
Approval Process

This session will require your *Sample Upload Data*.

Let's get ready to roll!

Diving into the Upload Tool

Log in to
EveryAction

Type "Bulk Upload
Wizard" into the
Search for a Page
menu

Access the Bulk
Uploader using the
link shown

The Bulk Upload Workflow

The screenshot displays the 'Bulk Upload Wizard' interface. On the left, a search bar contains 'bulk upload wizard' and a button labeled 'Bulk Upload Wizard' is visible below it. The main interface is divided into two panels. The left panel, titled 'Select Type', asks 'Which type of bulk upload do you want to do?' and offers four options: 'Load data with' (selected), 'Load new and/or make changes to existing contacts', 'Load data with Contribution ID', 'Load data with Address ID', and 'Edit Source Codes by Source Code ID'. The 'Load data with' option is further specified as 'VANID'. The right panel, titled 'Mapping Template', shows a table for mapping columns from the file 'CFShortname.csv' to database fields. The table includes columns for 'Mapping', 'Column from File', 'Applied Value', and 'Records'. A 'Finish' button is located on the far right of the interface.

Select Type

Which type of bulk upload do you want to do?

Mode Load data with

VANID

- 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

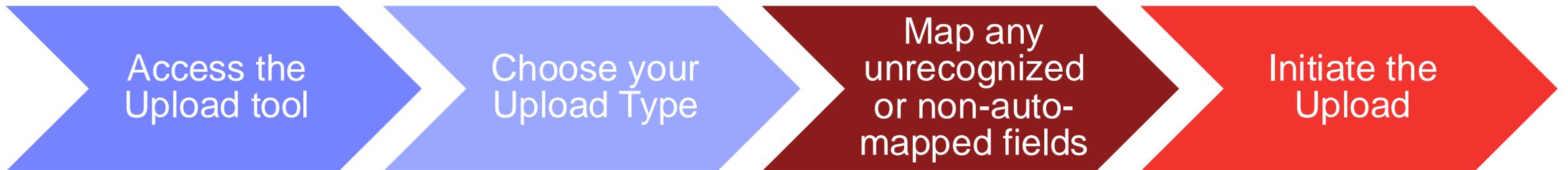
Mapping Template

You are using a new mapping template.

Apply values to the record from **CFShortname.csv** that you want added to your database, then click **Finish**.

Mapping	Column from File	Applied Value	Records
Address Line 1	address line 1	Inherited from uploaded file	1
City	city	Inherited from uploaded file	1
Contact Type		Contact Type: Individual	2
Email	email	Inherited from uploaded file	2
First Name	first name	Inherited from uploaded file	2
Last Name	last name	Inherited from uploaded file	2
State Or Province	state	Inherited from uploaded file	1
Zip Or Postal Code	postal code	Inherited from uploaded file	1

Finish



Let's try it out!

The Approval Process

When uploading using the Add New and/or Load Data option for Bulk Uploading, EveryAction will prompt an approval of the incoming data based on matching criteria if a VANID or External ID are not included.

This process is designed to avoid unintentional creation of duplicates and will always be required to finish prior to your data uploading to the system.

278346 Demo Input from Google

Upload Contacts
[Approve](#)

Upload Summary: Demo Input.csv

Match Level	Description	Count	Cancel	Export	Approve
1	ID Match	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Email plus other information	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Address plus other information	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Phone plus other information	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Full Name plus other information	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Email only	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Voter File Match (New Records)	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	No Match (New Records)	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	Not Enough Information	19	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	Organizations	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11	Duplicate Analysis Report Only	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12	Phone Only	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13	Partial Name plus other information	0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Next

Additional Resources

Additional Learning Opportunities

Currently, EveryAction has an expansive (and growing!) library of webinars available to review tasks like:

- **Creating Online Actions**
- **Sending Targeted Emails**
- **Adding New Users**
- **Creating Contributions**
- **Configuring Your Codes**
- **And much more!**

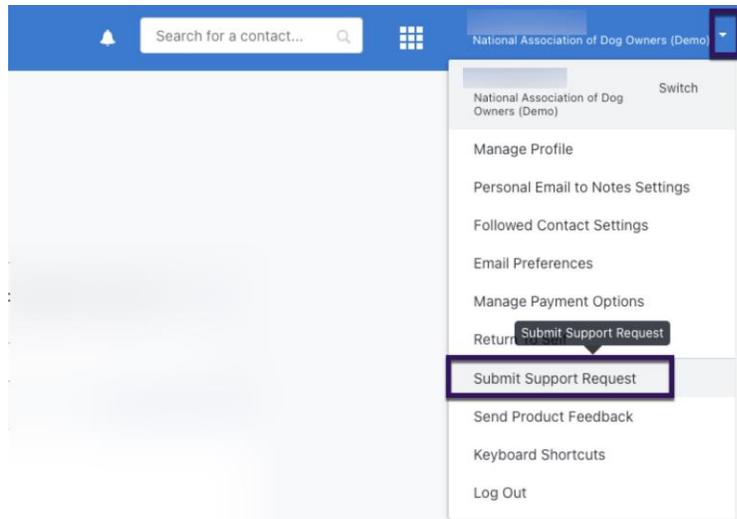


Build confidence and knowledge
in our software.

<https://www.bonterratech.com/training#everyaction>

Support

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



Q & A

- Ask questions about functionality covered in this training
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.