

# 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

### Queries

- ◆ Create a new Query
- ◆ Run an existing Query
- ◆ Export Data

### Import Data

- ◆ Import Supporter List
- ◆ Your Import Status
- ◆ Upload request details

### Add Supporter

First Name

Last Name

Email

Phone

Save

### Last Modified

- ◆ Email blast:5
- ◆ Email blast:5
- ◆ Email blast:5
- ◆ Email blast:5



## Manage your list of supporters

### Basic Search

Standard search:

First Name

Last Name

Email

Phone

Street

State

Zip

Click Here to Import Data

Search

Search using:

Email  starts with:

Search

### Advanced Search

Create New Query -->

### Quick Add

Title  Select Title

First Name

Last Name

Email

Phone

# 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

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### Add Supporter

First Name

Last Name

Email

Phone

- ### Last Modified
- ◆ Email blast:5
  - ◆ Email blast:4
  - ◆ Email blast:4

## Upload Supporter File: Step 1 of 2

To upload a file containing information about your supporters, such as names, addresses, email, etc., a specially formatted file is required. The accepted format for this data is a simple comma-separated data file, which can be created as follows:

### For Microsoft Excel, OpenOffice Calc Spreadsheet, and most spreadsheet applications:

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 new '.txt' file  
Select 'Continue-->' and follow the instructions

### For basic text files

Separate each supporter into one line, and distinguish different fields by tabs.  
For Example: BobSmithbobsmith@smith.org703-555-1212  
Save the file  
Using the Browse button below, navigate to the directory and select the new '.csv' file  
Select '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 databases:

There are many different methods. Contact us for recommendations.

Filename

### Options

Field delimiter (the character between the different fields)

Table to upload data to:

Write-in table:

This data looks a lot like data from:

If the automatic field matching algorithm is hurting more than helping, click this box:  Disable Automatic Field Matching

*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

# 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

[Your List](#) [Email](#) [Reports](#) [Website](#) [Templates](#) [Configuration](#)

## File Import -- Step 2

Delimiter: ,

Reference Source Name for this data:

### Field Matching

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

Your first row of data	Database Field	Replacement Options, if any
david@riseup.net	<input type="text" value="Email"/>	<input type="text" value="No rules"/> a->y&b->z...No ''
David	<input type="text" value="First Name"/>	<input type="text" value="No rules"/> a->y&b->z...No ''
Taylor	<input type="text" value="First Name"/>	<input type="text" value="No rules"/> a->y&b->z...No ''



### Supporter Groups

Add users to the following Group:



### Advanced Options

These options should only be used by advanced users who understand the consequences.

#### Skip lines

Skip  lines.

#### Deduplication

DemocracyInAction 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

Deduplication Field

#### 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.

The first few lines of the file:

david@riseup.net,David,Taylorgunner@aspirationtech.org,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

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### Add Supporter

First Name

Last Name

Email

Phone

*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:

ID	Date Requested	Date Completed	Supporters Created	Supporters Updated	Number of Errors	filename
3	2006-03-15 12:05:10					supporter-2006-03-15 11.56.49-paste.txt
1	2006-03-10 16:29:38	2006-03-10 16:29:38	3	0	0	supporter-2006-03-10 11.10.08-paste.txt

Page: 1  
Total: 2



# End Of Section

- ▶ Questions?
- ▶ Comments?

## Thank You!

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