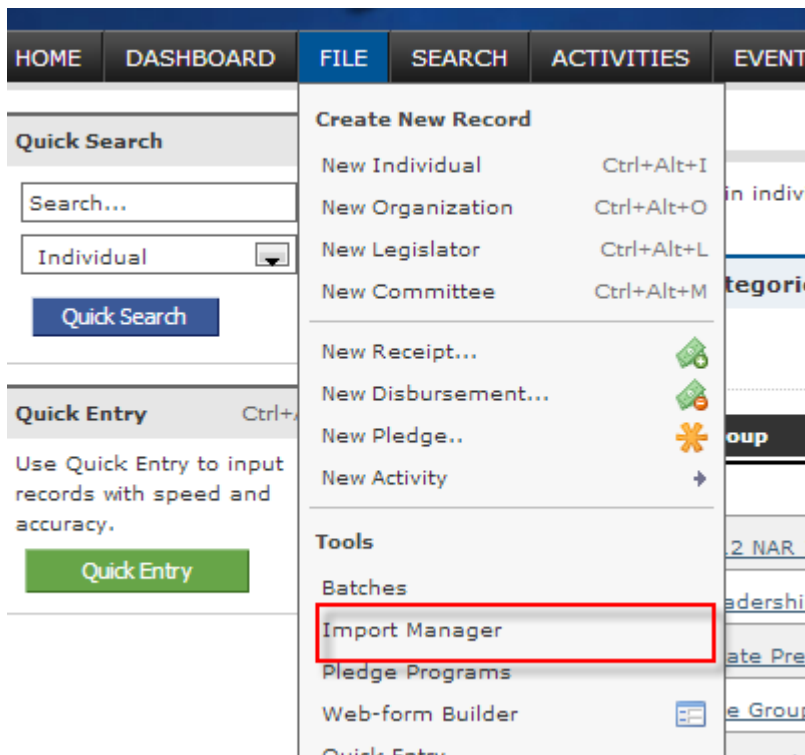


# Uploading Phone Bank Target & Volunteer Lists

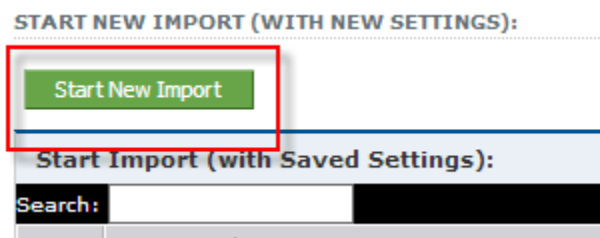
You will need to prepare two (2) files, one file for your targets and one file for your volunteers. Each file must be formatted as follows:

- .csv or .xls (Excel 97-2003) format
- One column contains 9-digit NRDS ID, one column contains name

1. Go to File – Import Manager.



2. Click Start New Import



3. Click the **Browse** button to select your source file. Leave import type as **Individual**, type in the **Import Title**, and select the **Federated Group** (this is your Local Association 4 digit ID. E.g. AK – (1005). If you are with a State Association, select the State Association 3 digit ID. Eg. AK:802)

Then check the box **“first row contains column headings.”** There can be no spaces above the first row of headings.

#### STEP 1: SELECT YOUR DATA FILE...

Select the source file that contains the data you wish to bring in and describe the file and data types.

- View our **Sample Preformatted Files** for examples on how to setup your import file(s). The maximum supported file size for a single import file is 50MB.

Source File:

(Max File Size: 50MB)

Import Type:

Import Title:

Description:

Federated Group:

First row contains column headings. (Not valid for .DBF files)

Next

Cancel

4. Click **NEXT**
5. You will now be taken to the **Confirm Your File** step. This shows you a preview of your import group. Click **NEXT**.

#### STEP 2: CONFIRM YOUR FILE...

Confirm that your source data is properly formatted, is being accurately interpreted by the import wizard, and that the number of records is accurate.

Import Name: 2014 Association Management Committee

Source File:

Source File Type: XLS

Destination Data Type:  Individual

Number of Records: 17

6. Now you must map your data.
  - a. Select the row with the NRDS number (in the **Source Preview Column**), and under the **Field Data Type** menu, select **Basic Info**.
  - b. This will prompt a window in the destination field, select **Source ID** from the menu.

**DATA MAPPING:**

Source Column	Source Preview	Line	Field Data Type	Destination Field	Default Email	Validation
		1				
(1) E-Mail Display Name	Marlys Lien		-- Do not Import			
(2) First Name	Marlys		-- Do not Import			
(3) Last Name	Lien		-- Do not Import			
(4) E-MailAddress	mrtlylien@eoni.com		-- Do not Import			
(5) NRDSMember_id	698000041		Basic Info	Source ID		

7. Type in the name of your list under the header Step 4B: Assign to List, and click **Add New List**. When you get the confirmation "List Has Been Added" click Next.

### Aristotle 360 Import Wizard

This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

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**STEP 4A: ASSIGN TO GROUP**

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

Add All Imported to Below Selected Groups  
 Import Groups From Source

---

**STEP 4B: ASSIGN TO LIST**

Assign the records from your source data file to a New List. This step is optional.

8. Following criteria in the Record Matching page:

**ADDING NEW**

Create Non-Existing Individuals

Ignore Non-Existing Individuals

**UPDATING EXISTING**

Update Individual Info

Do Not Update Individual Info

**MATCHING CRITERIA**

First Name, Last Name, Source ID

First Name, Last Name, Address Line

First Name, Last Name

Source ID

Voter ID

First Name, Last Name, Address Line

First Name, Last Name, Zip5

**ADDRESS VALIDATION**

Validate address with latest district inf

**SOURCE ID**

Add Padding to Beginning of Source ID

Character to be appended to Beginning of Source ID

Enter the number of characters that make up your entire source ID

9. Enter your email into the **Email Notification** field. Click **FINISH**, you do not need to save settings.

**Aristotle 360 Import Wizard**  
This wizard allows you to import a list of individuals, organizations, transactions and other related records.

**FINAL STEP...**

Clicking the Finish button will start the import procedure. Please make sure to save your settings if you will reuse the same data structure later on. Also make sure to type in your email address, so we can send you a detailed report about your import.

**SAVE SETTINGS:**

Save As (Name):  [Save Settings](#)

Description:

**EMAIL NOTIFICATION:**

Send Email to:

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