



Uploading Manual Data (Manual CSV Import)

West Corporation

100 Enterprise Way, Suite A-300
Scotts Valley, CA 95066
800-920-3897
www.schoolmessenger.com





Contents

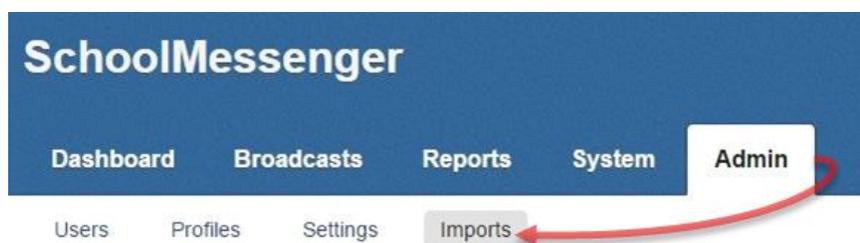
How to Update Your Manual Import / Upload Manual Data Files	3
Questions?.....	6
SchoolMessenger Solutions Support.....	6

How to Update Your Manual Import / Upload Manual Data Files

If your SchoolMessenger Communicate configuration is such that you have your contacts established by an import that you manage in an Excel CSV file (rather than an automatic transfer of data), then you will need to update your data when things change. Adding new contacts, removing old ones, or simply changing existing contacts' data are all reasons to do so. The following steps describe the general process for updating your manual import(s).

Important: *If you are not certain if you have this type of import, or if you need assistance, please contact SchoolMessenger solutions support at any time before making any changes to avoid data loss.*

1. Log in to your Communicate account, and navigate to the **Admin** tab, then to the **Imports** sub-tab.



2. If you do not already have the most up-to-date version of the CSV file that you wish to use to update the import on your workstation and readily accessible, click **Download** for the data file you wish to update to download the version of the file as was last sent to Communicate.

If you already have the file on your workstation, disregard this step and step 3, and move on to step 4.

Data Import Manager

System Imports ⌵							
Name	Description	Type	Method	Status	Last Run	File Date	Actions
Student Demographics		Person	Update, create, delete	Idle	Jun 29, 2015 12:26 pm	Jun 29, 2015 12:26 pm	Upload Download Run Now Log Edit Delete

3. Open the **"data.csv"** that is downloaded.

(If this has been downloaded before, you may see a number in parentheses in the filename – this does not affect the way the data looks, just make a note of the file name and make sure to open that particular file. For instance, if it is data(5).csv when you click "Download" this time, then open that one, and not data(4).csv, because that older file may be different than what you need.)

4. The data file should open in Excel. Here, you can change any names, phone/email information, or other data.
 - To **add a new contact** so that it will show up in Communicate when the import is updated, find the first blank line at the bottom of your contacts list. Make sure you add a unique ID in the appropriate field that is not the same as any other contact's unique ID in any of your imports. Then, type the remaining information such as name, phone, etc.
 - To **delete a contact** so that it will be removed from Communicate when the import is updated, find the row that the contact is on, and delete that entire row. If you think you may need their information in the future, or if you're required to retain it for some reason, make a backup of some kind before deleting the row.
 - To **update contacts' information** so that the new information shows in Communicate when the import is updated, simply find the contact in the file, and change whichever information needs to be changed.

	A	B	C	D	E	F
1	ID Number	First Name	Last Name	Phone 1	Phone 2	Email 1
2	123456	John	Smith	123-456-7890	123-456-7890	example@anyemail.com
3	789123	Jane	Doe	456-123-7890	123-789-4560	another@example.com

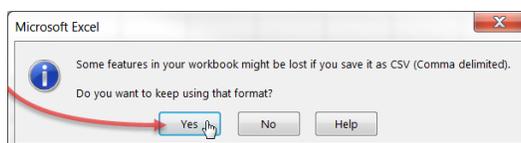
Important: Every record **MUST** have a unique ID. It can be numbers, letters, or a combination of both (no symbols), but it must be truly unique for every contact, throughout all the imports.

Important: The columns need to stay in the same order to preserve the mapping of the import in Communicate – each field (Phone 1, for instance) is mapped to a specific column in this file. If you need to add a new field of data, try to add it to the end of the existing columns. For instance, if you have columns A through F right now, but you need to add another email address, add it to column G instead of inserting it between the existing columns. If you need to update the column order, it is advised to call SchoolMessenger solutions support before updating the import after doing so to ensure that the mappings are corrected afterward.

Important: CSV files cannot be more than one sheet, and should have no special formatting.

5. When all changes have been made, **save the file** with the new changes. You can use **File > Save** or click the  button.

Note: When you save a CSV file in Excel, you will almost always be presented with a message warning you that by saving, certain formats may be lost (or something similar). Making sure that this is definitely the document mentioned in this guide and not another important one, you can safely say “Yes” to this every time. (If for some reason you have made formatting changes like highlights, etc., or multiple sheets, and you want to retain that, the file will not work for these purposes. It must be CSV, and one sheet.)



- Back in Communicate, on the **Admin** tab > **Imports** sub-tab, click the Upload button next to the import that you wish to update.

Always ensure that it is the correct import – if a file from one import is accidentally uploaded into another, it can cause data issues.

Data Import Manager

System Imports							
Name	Description	Type	Method	Status	Last Run	File Date	Actions
Student Demographics		Person	Update, create, delete	Idle	Jun 29, 2015 12:26 pm	Jun 29, 2015 12:26 pm	<input type="button" value="Upload"/> <input type="button" value="Download"/> <input type="button" value="Run Now"/> <input type="button" value="Log"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

- Select the **Choose File** button (it may say “Browse” instead in some situations).

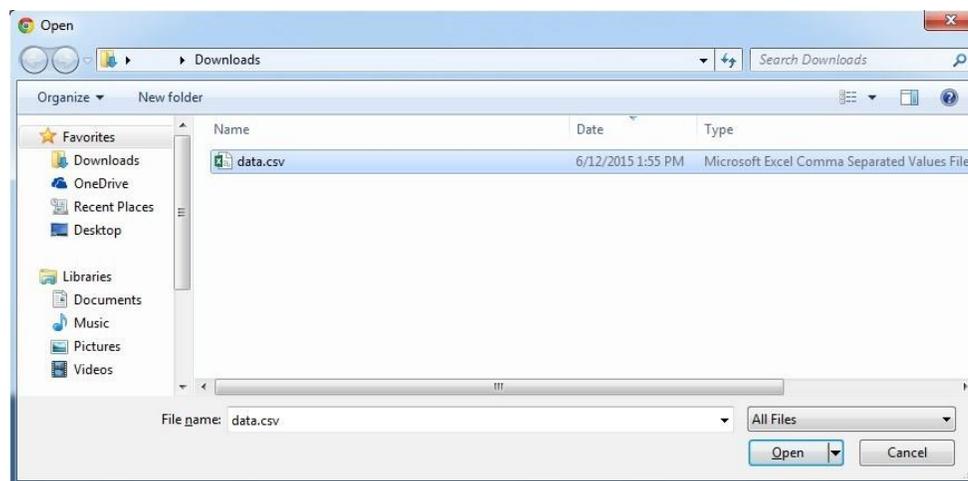
Import Upload: Student Demographics

Upload Import File

Upload File: No file chosen

ⓘ Please select a file to upload and then click Upload to continue.
NOTE: if uploading a ZIP file, please be sure you only have one CSV file in the zip archive.

- Browse to and then select the **CSV file** on your workstation, and click **Open**.



9. Once the file is selected, you will see the filename to the right of the “Choose File” (or “Browse”) button. Now, click the **Upload** button (either at the top, or the bottom – they are the same).



10. This will take you to the Import Field Mapping screen, but nothing needs to be changed in the mapping for these purposes – simply click the **Submit and Run Now** button to finish updating the import.



Congratulations - your import data has been updated! If you wish to view your newly-updated information, after a few moments, navigate to the **System** tab, then to the **Contacts** sub-tab, and search for contacts that have changed to see the results.

Questions?

If you have any questions regarding the above, please contact support.

[SchoolMessenger Solutions Support](#)

800-920-3897

support@schoolmessenger.com