SchoolMessenger®
COMMUNICATE

Uploading & Updating Data for your Manual Import: Admin Guide

West Corporation

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

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Updating & Uploading Data for Your Manual Import

In SchoolMessenger Communicate, there are many types of imports, but two basic categories: **Automatic** and **Manual**. If you have a **Manual import**, this means that you manage your contacts and their data manually via an Excel file (which is in CSV format), and upload the changes directly to the program.

Please note that typically, only System Administrators and other top-level Users will have access to the sections of the program needed to perform this function. If you do not have access but believe that you need it, please refer to your System Administrator for help.

💡 *Note: Depending on your situation, you may have elected to have a static CSV file on your workstation that you maintain and upload your data within, or you may want to download the CSV from the program, update it, and re-upload instead. The steps to follow detail the process for downloading the CSV from the program, updating it, and re-uploading it, but you can follow the latter steps for updating and uploading your Manual import if you have a static file.*

Downloading the CSV Data File from the Program

To begin working on the data to update it, you must first acquire the CSV file. The following steps detail how you can download the CSV file manually from an existing Manual import.

💡 *Note: Depending on your situation, you may have elected to have a static CSV file on your workstation that you maintain and upload. If you already have this file and are confident that it is the most up-to-date file, you can skip this section and move on to the "Updating the Data in the CSV File" section. Contact support if unsure.*
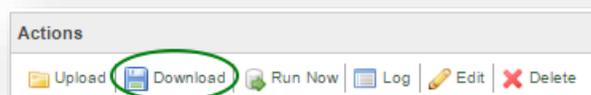
Downloading the CSV File

1. Navigate to the **Admin** tab, then to the **Imports** subtab.
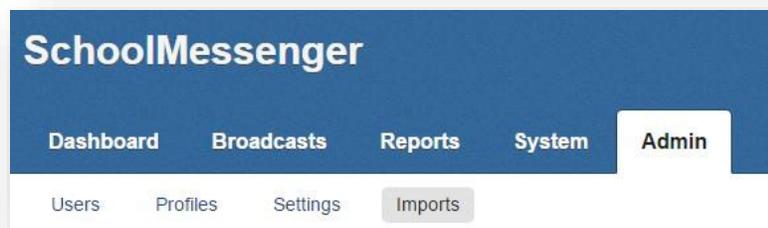
2. Here, you will find your imports. To the right, under the **Actions** section, you will see several buttons. First, ensure that you are referencing the correct import by following the name of the import to the buttons, and then click the **Download** button to download the CSV file of the import.

3. A file will be downloaded called "**data.csv**" or "**data(x).csv**" (where "(x)" is the number of the duplicate if downloaded more than once).
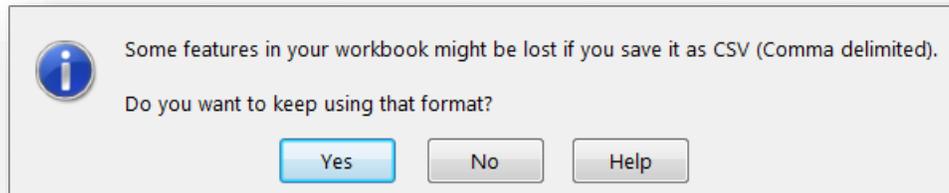
💡 *Note: Depending on the browser that you are using, it may download to the bottom left of the browser, a special "downloads" folder, or it may prompt you to open or save the file (if so, open it).*

4. Open the file. It will be a simple structure, with each column representing one type of data. There may be numerous columns, and some may be columns that you don't even use, which is fine. It should look, in general, like this format:

	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

5. Save the file to your workstation somewhere you can find it, using any name you like. Depending on your version of Excel, the steps could vary.

Remember that when you save a CSV file in Excel, you will ***always*** get the following message in some form, to which you should ***always*** say "**Yes**" (making sure that this is actually this specific message before clicking "Yes" of course, to avoid confirming something other than this) :

> ℹ️ Some features in your workbook might be lost if you save it as CSV (Comma delimited).
>
> Do you want to keep using that format?
>
> [Yes]   [No]   [Help]

💡 *Note: It is best practice that if you are downloading a file every time you update your Manual import, you should put the current date in the filename (remembering to use hyphens instead of slashes due to the rules of filenames), or some other identifying piece of information so that you can tell the different files apart in future update sessions.*

Updating the Data in the CSV File

Once you have the file saved (if applicable) and opened, you can now begin the process of modifying the information as needed to update your data in the program.

Below you will find information about how to **remove contacts**, **add contacts**, **change data**, and **best practices** for managing the file and the data within.

💡 *Note: This is not the last step – modifying this file alone will not update the information in the program. After these steps are completed, you must follow the steps to upload the CSV file to the Manual import to finally update the contacts.*

Best Practices (Column Order, Unique ID, File Format)

A. The program uses a **Unique ID** to establish a System Contact, and connect it to its data, such as phone numbers and email addresses. When creating new contacts or managing existing contacts, it is important to remember the following:

- Every contact *must* have their own Unique ID that is truly unique to just *that* contact. They should always have the same Unique ID for the entire time that they are in the program.

- Never reuse the same Unique ID.

- A Unique ID can be whatever you like, but if you use a naming convention like "STUDENT001" and are not sure if you have used the ID before, you can start with a new convention, like "STU0001".

B. Each piece of data in the CSV file (if used) is eventually **mapped to a field in the program** when all is finished. This establishes the connection to the program fields from the CSV file data.

The mapping is based on the order of the columns. For instance, Column C in your CSV file might have a phone number for your contact. This might be "mapped" to the "Phone 1" field in the program.

It is for this reason that you should **try not to change the order of the columns** unless you plan on also changing the mapping. For instance, if you move "Phone" and "Email" columns around, then the "Email" value could end up in the "Phone 1" field in Communicate, or vice versa, which would impact your broadcasts negatively.

Typically, mapping is done by support technicians, so if you are not certain if what you are changing will affect this or if you think you may need to change the order of the columns, please contact support for assistance.

💡 *Note: This does not apply to adding new columns, as long as you add it to the end of the existing columns. For example, if you have data in columns A through F, and you add column G, you are fine.*

C. The program only accepts **CSV** files (which stands for Comma-Delimited Values). Do not save the document that you are modifying as any other file format other than CSV, or it will not work.

Deleting a Contact

To **delete a contact** from your data (such as a student that graduated last year or an employee that is no longer with your organization), use the following steps.

1. Locate the row that contains the contact.

	A	B	C	D	E
1	Unique ID	Last Name	First Name	Phone 1	Email 1
2	ST001	Smith	John	123-456-7890	noreply@schoolmessenger.com
3	ST002	Smith	Jane	555-123-4567	noreply@schoolmessenger.com

2. Delete the row entirely. On most workstations, this involves right-clicking on the row number, and choosing "Delete". The in-product help for Excel can usually assist if you have difficulty.

Adding a Contact

To add a new contact to your data (such as a newly enrolled student or a new employee), use the following steps.

1. Scroll to the bottom of your file, and find the very next blank row.

2. Enter the appropriate data into each column, using special care to give the new contact a truly unique value for their **Unique ID**. If unsure, you can always use a new naming convention for the Unique ID.

## Changing Existing Data (Phone Numbers, Emails, Etc.)

To change any information such as phone numbers, emails, and other such information, you need only to replace what is currently in the cell with the new value.

⚠ *Important: Remember, it is best practice to use the same Unique ID for each contact for the entire time that they are in the program. Therefore, you should never change a Unique ID under most circumstances.*
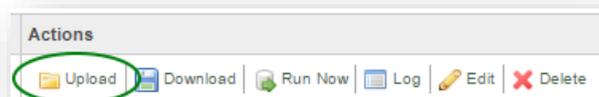
Uploading the CSV File to the Manual Import

After you have updated the data in your CSV file and saved it, you are now ready to update the program by uploading the CSV file into the Manual import.

1. Navigate to the **Admin** tab, then to the **Imports** subtab.
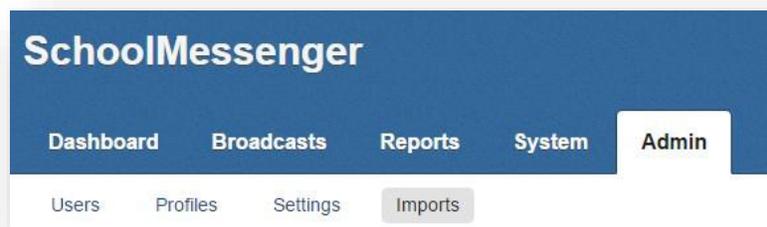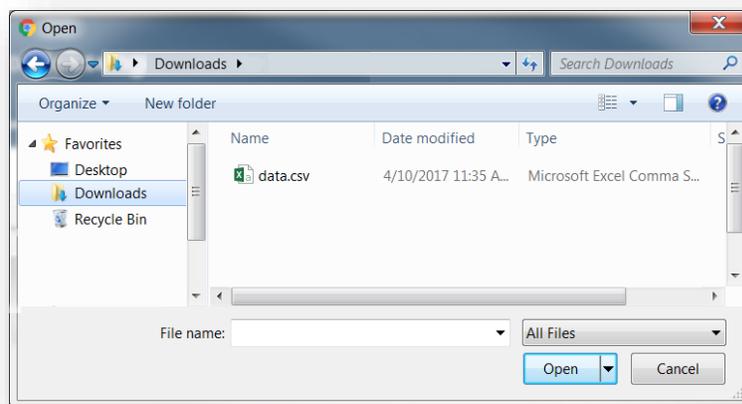

**2.** Ensuring that you are referencing the correct import, click **Upload** to the right of the import.

3. You will now be on the **Import Upload** screen. Click **Choose File** (or in some cases it may say **Browse**). This will open a window that you can use to browse to the CSV file.

Find it, select it, and confirm (usually by clicking "Open" on the window).

The name of the file will now appear next to the Choose File button.
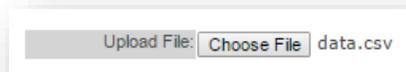

4. Click either of the **Upload** buttons.

5. You will now be on the **Import Field Mapping** screen. Click **Submit and Run Now** to update the import.

⚠ *Important: Clicking Submit and Run Now will update the import. If you are not sure that you want to do so, please contact your System Administrator (if applicable) or support for assistance.*

6. You will be taken back to the **System Imports** screen. In the Status column, you may see the import status change from *Queued*, to *Running*, and finally to *Idle* status, which means it finished with no errors. You can refresh the screen in your browser to update the statuses, or click the **Refresh** button in the top right of this section if you prefer.

If you wish to check your Contacts to make sure that their data has updated successfully, navigate to the **System** tab, and then to the **Contacts** subtab. There, you can search for contacts, and click on their ID numbers to open their contact information. This is not a part of the import process, but rather a way to easily check the data once the import has been updated.
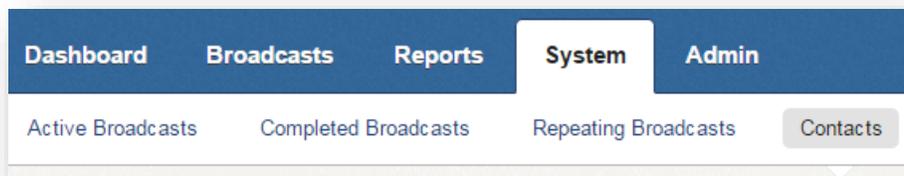
Questions?

If you have any questions regarding uploading manual data into your Manual imports, please contact support.

SchoolMessenger Solutions Support

800-920-3897
support@schoolmessenger.com