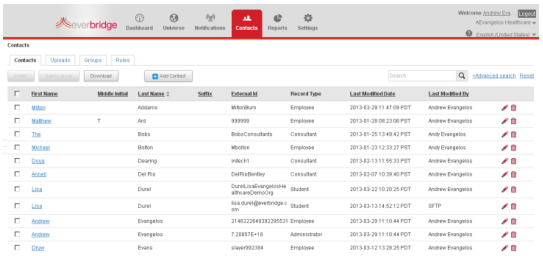
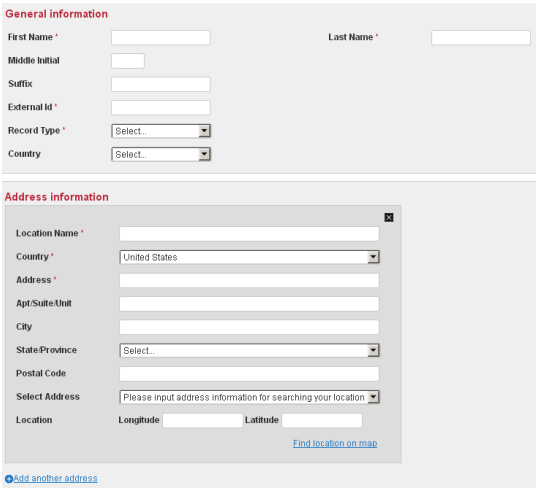
Quick Sheet MN: Managing Member Data

Contacts Tab

Under the Contacts Tab, you can edit individual contacts (click the pencil icon), delete contacts (click the trash can), assign members to groups, download a CSV of the current database, create new contacts, and complete a search for an existing contact. Any changes made are reflected immediately in the database used for notifications.





Editing/Creating a Contact

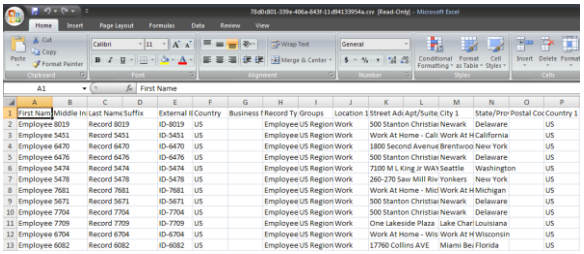
From the contact tab, you can add or edit existing contacts. Note the following:

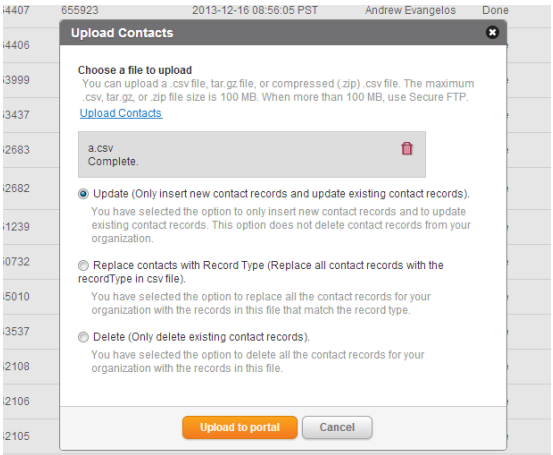
- External ID and Record type are required fields.
- External ID must be unique for each contact.
- Addresses will automatically geocode. Select the formatted address from the dropdown box. You can add up to 5 addresses per contact.
- Set contact paths and device order
- Additional Information fields can be added

Be sure to click save after making changes to a contact.

Preparing an Upload File

If you have a large number of contacts you need to add or edit, try using a CSV file. You can download a template from the Uploads sub tab. Please note that First Name, Last Name, External ID and Record Type are required. The record type must match one that is in the settings (Employee is Default).





Uploading a Contact Data File

To upload contacts, click Upload to portal under the uploads sub tab. Decide if you are doing an update, replace, or delete. Update makes changes to existing contacts and adds new ones. Replace replaces all contacts with the same record type. With replace, if a contact is in the system, but not in the new file, the contact will be deleted. After the upload is complete, you can view the results by clicking the icon on the right. This will show the number of contacts loaded without error, with error, and those not loaded due to a critical error. The error display will allow you to make changes to your CSV file and upload the file again to fix the errors.