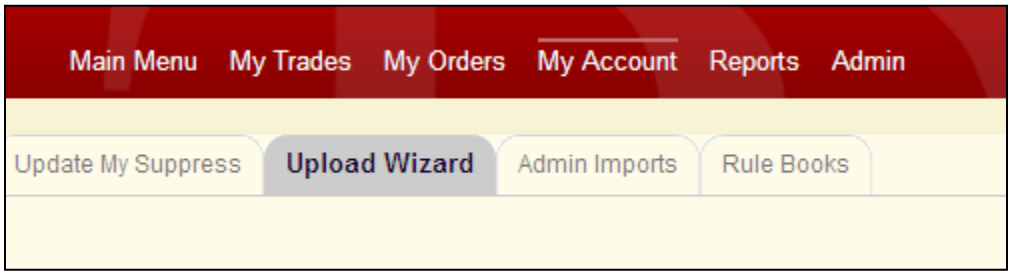
Upload Wizard Guide

Before you begin

1. Review the data you have in eMerge currently.
    a. Determine what needs to be updated.
    b. Determine what data needs to be added as new.
2. TRG has provided a template for your use in preparing your data for upload. You must have all fields named EXACTLY as the template indicates. There can be no additional fields (columns) and all fields must be present.
3. Files uploaded with the Wizard can be in the following formats: xls (Excel 2003), csv (Comma Separated Value) or txt (Text, tab delimited).
4. All records must include at least one of the following to be valid: last name, company name, full name, or email. If NONE of these fields are populated, the record will not be loaded into eMerge.
5. Your uploaded file will be used either to add a new list to eMerge or to replace ONE eMerge list (segment).
6. If you choose to replace a list in eMerge, all records currently in that list will be removed in favor of the new list.

TRG Upload Wizard

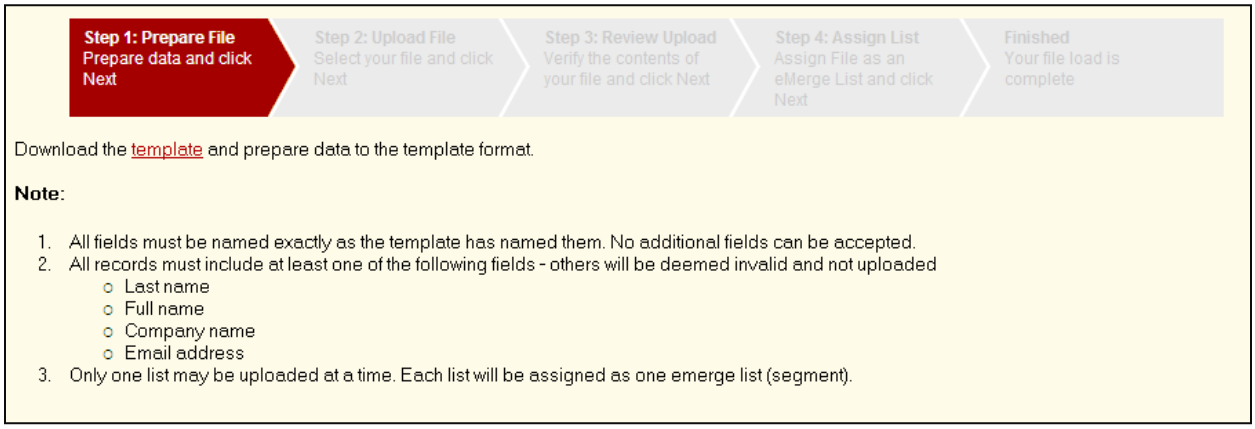
To get to the Wizard, log into eMerge as usual.
Go to My Account and click the tab called Upload Wizard.



Click Start Wizard to begin.

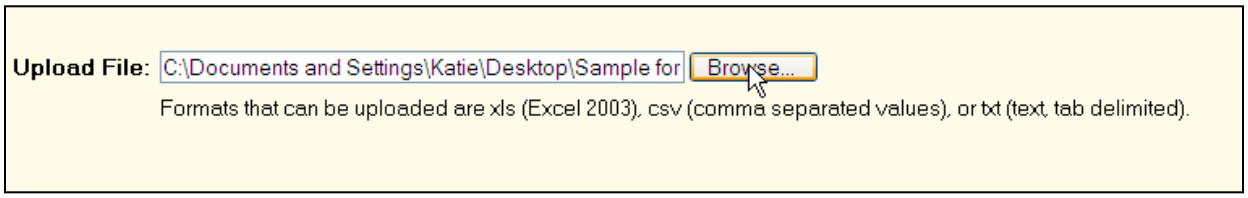
Step 1: Prepare File

This step is a reminder that all files must be in the template. Click Next to continue.

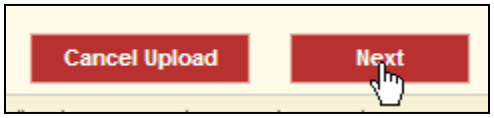


Step 2: Upload File

Click the Browse button to find your file from your computer.



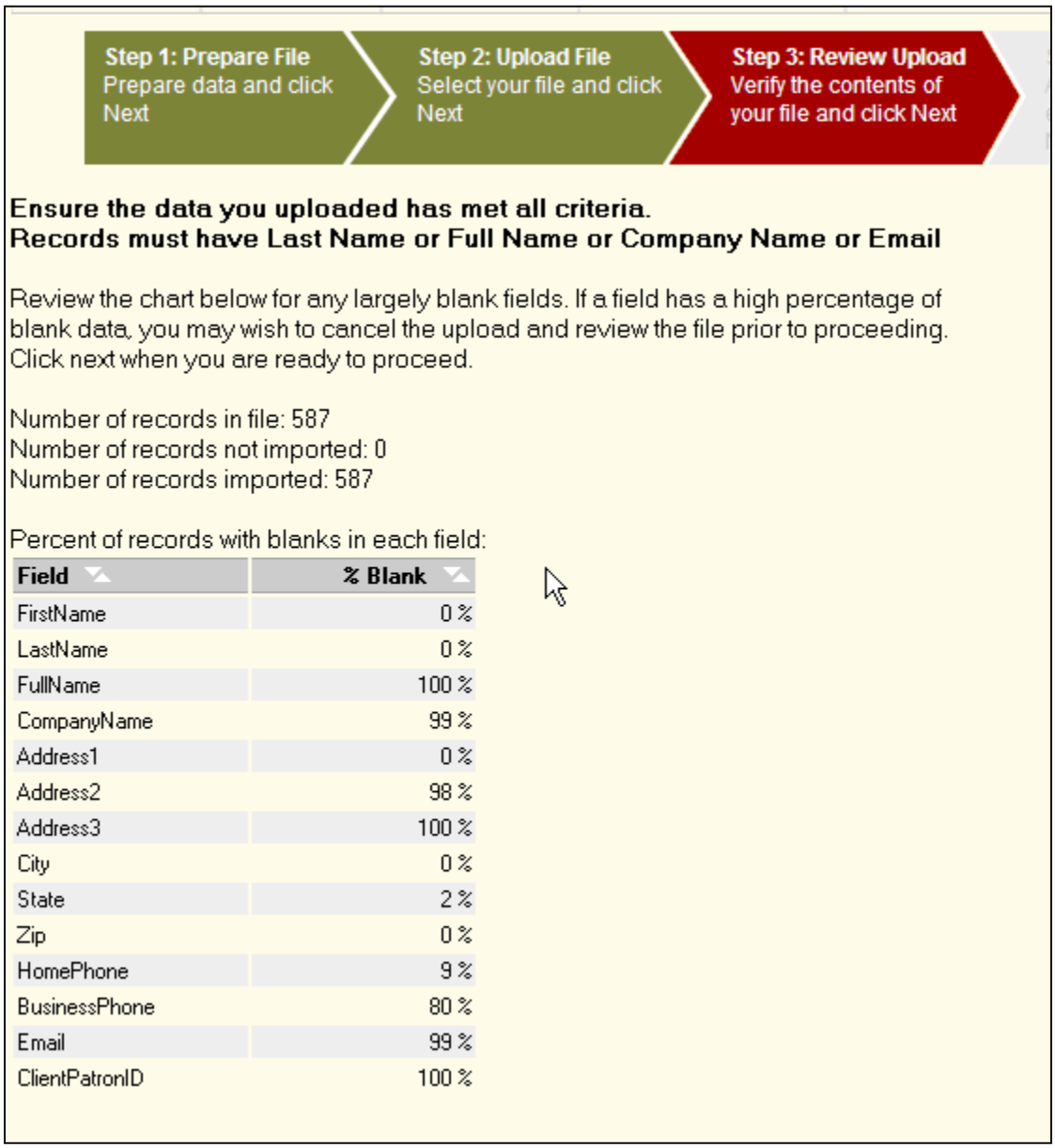
Once you have selected the file, click Next.



Step 3: Review Upload

Review what you have uploaded. Note the number of records in the file and the number that will not be uploaded due to empty fields. Also note any fields with a large percentage of blank records.

In the example below, since the Email field shows 99% blank, if you believe all of your records should have email addresses, you should review your file prior to continuing. In that example, you would cancel the upload, review your file and prepare it for upload again. Start over with the Upload Wizard when your file is satisfactory.

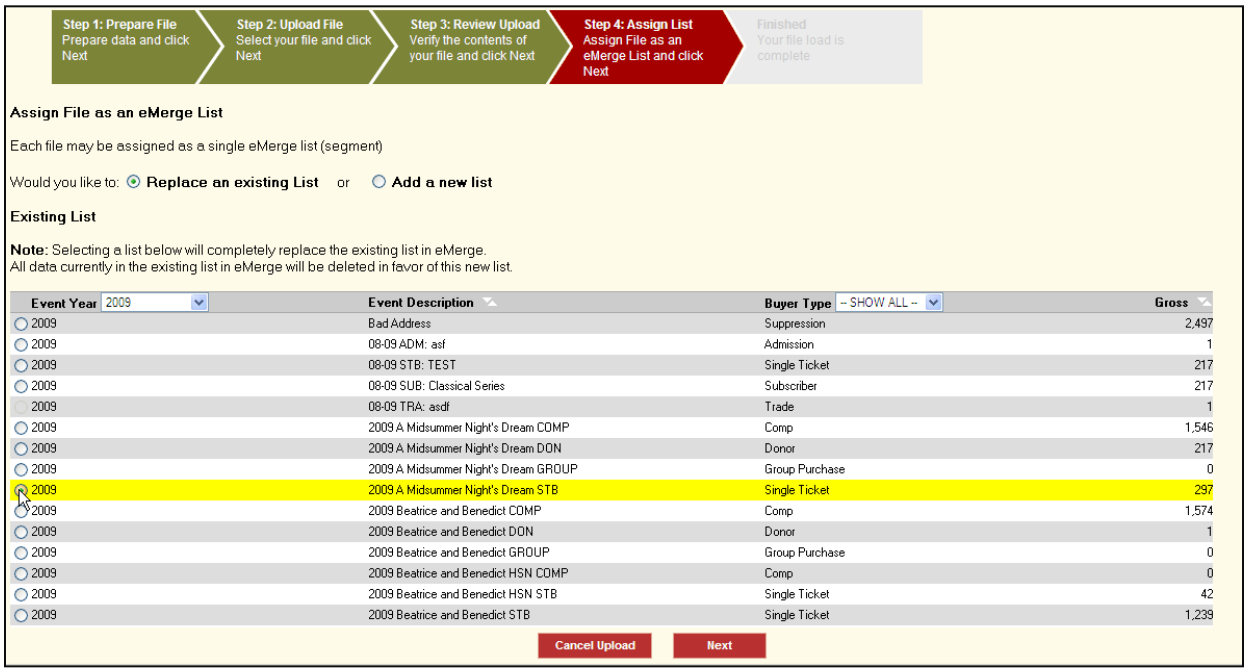


Field	% Blank
FirstName	0 %
LastName	0 %
FullName	100 %
CompanyName	99 %
Address1	0 %
Address2	98 %
Address3	100 %
City	0 %
State	2 %
Zip	0 %
HomePhone	9 %
BusinessPhone	80 %
Email	99 %
ClientPatronID	100 %

Step 4: Assign List

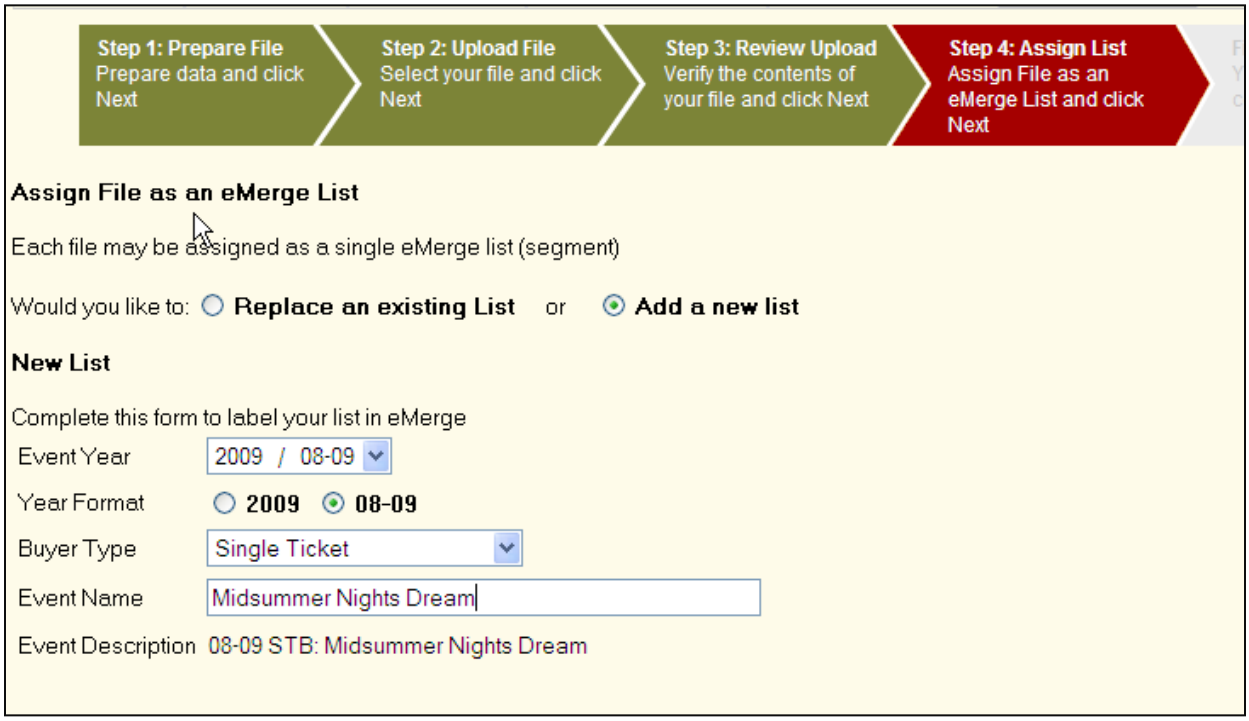
At this step, you must determine whether your list is going to replace an existing eMerge list (segment) or whether you are going to use your data to add a new list to your eMerge warehouse.

If you are ***replacing an existing list***, you will be provided a listing of all your current eMerge lists. You can select which list you wish to replace. Remember that by replacing an existing list, you are choosing to delete all of the records currently there, and replace them with the new file.

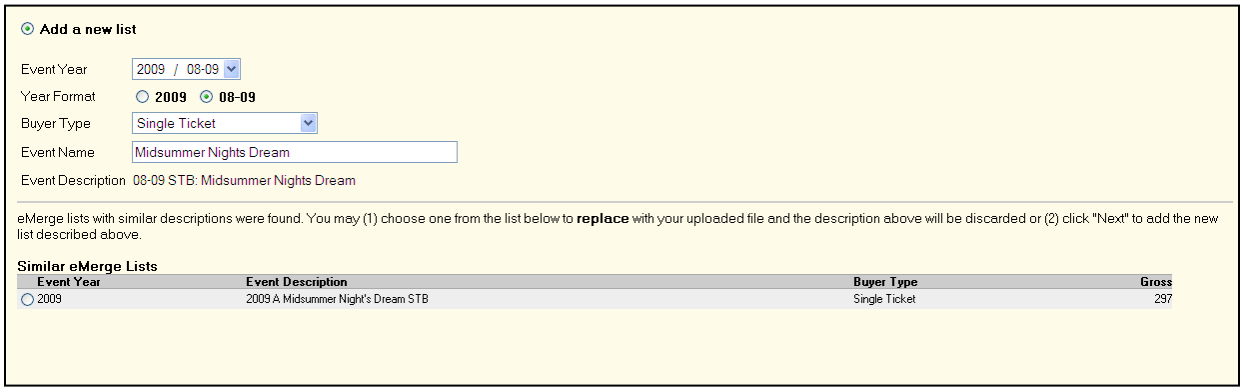


Event Year 2009	Event Description	Buyer Type -- SHOW ALL --	Gross
2009	Bad Address	Suppression	2,497
2009	08-09 ADM: asf	Admission	1
2009	08-09 STB: TEST	Single Ticket	217
2009	08-09 SUB: Classical Series	Subscriber	217
2009	08-09 TRA: asdf	Trade	1
2009	2009 A Midsummer Night's Dream COMP	Comp	1,546
2009	2009 A Midsummer Night's Dream DON	Donor	217
2009	2009 A Midsummer Night's Dream GROUP	Group Purchase	0
2009	2009 A Midsummer Night's Dream STB	Single Ticket	297
2009	2009 Beatrice and Benedict COMP	Comp	1,574
2009	2009 Beatrice and Benedict DON	Donor	1
2009	2009 Beatrice and Benedict GROUP	Group Purchase	0
2009	2009 Beatrice and Benedict HSN COMP	Comp	0
2009	2009 Beatrice and Benedict HSN STB	Single Ticket	42
2009	2009 Beatrice and Benedict STB	Single Ticket	1,239

If you are ***adding a new list***, you will be provided dropdowns to select the Event Year, Buyer Type, and a place to type in the Event Name. All of these fields will combine to create your Event Description in eMerge. Click Next when you are finished.

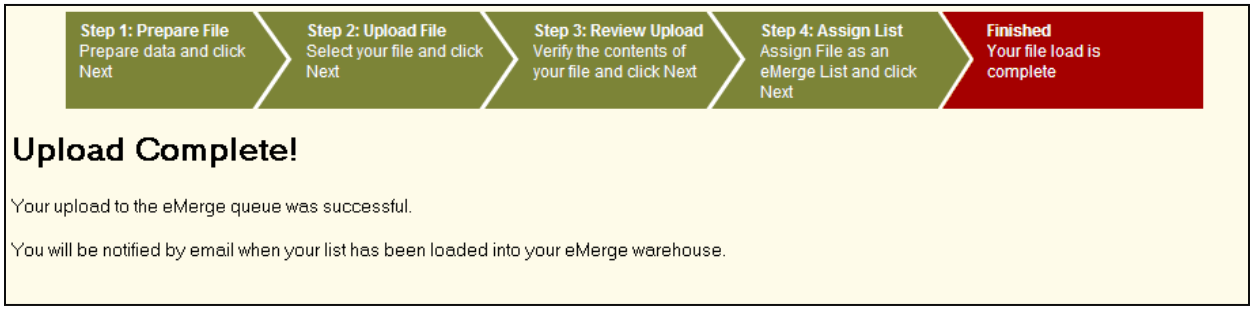


If the list you attempted to add is similar to a current list in eMerge, you will be provided the option to select one of those lists. You may choose to continue adding a new list or may select a list to replace. Click Next when complete.



Finished

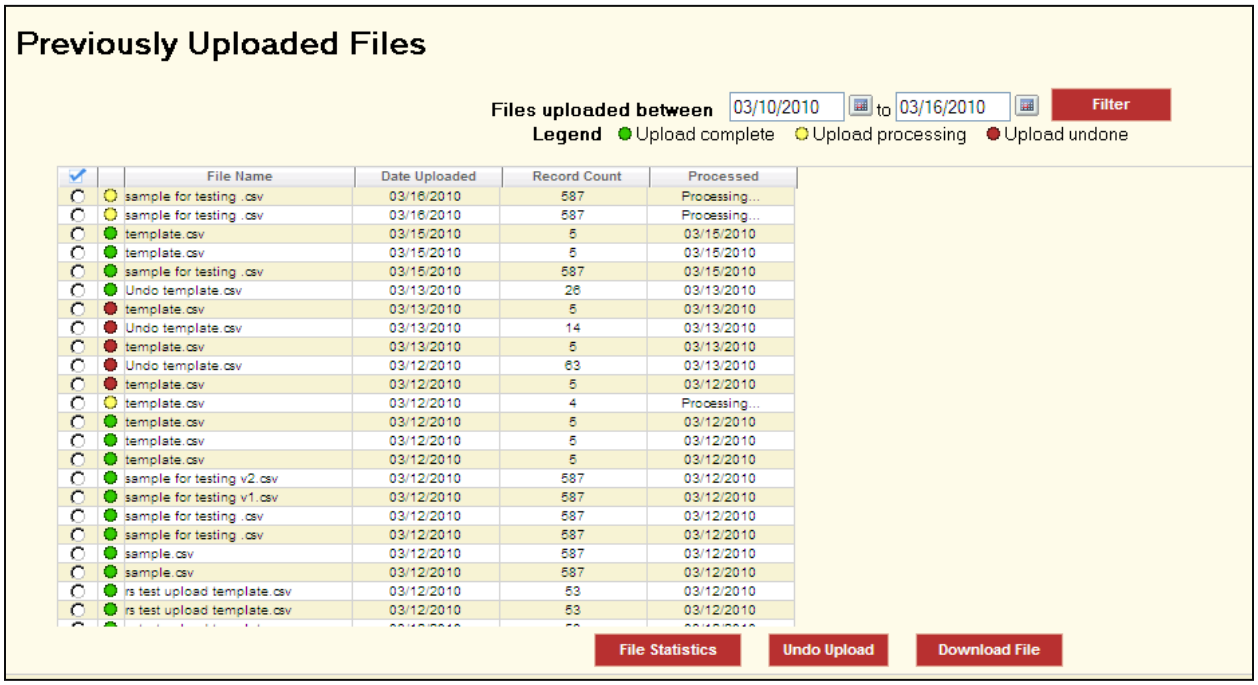
Your list is now put in a queue for upload to eMerge. It will be ready in eMerge within five business days of upload. You will receive an email when your list is ready in eMerge. If you have another list to upload, click “Return to Wizard” to start the process again with another file.



Previously Uploaded Files
When you return to the Wizard start page, you're able to see the list you just loaded into the queue under Previously Uploaded Files. The yellow dot means it is in the queue, but has not been put into eMerge yet.

File Statistics: This is available after the list has been processed and is uploaded to eMerge (green dot). It opens a web page with a report that details the same information as the email sent to you upon completion of your upload (number of records, number of records not uploaded, etc).

Undo Upload: Once a file is uploaded (green dot), you can undo your upload. This will undo the replacement of your prior list (note that it will NOT remove a new list you created). Only the last iteration of a list is available to undo. Meaning, only your most recent upload for that eMerge list can be undone. You cannot undo an upload for a list that another upload has replaced.



File Name	Date Uploaded	Record Count	Processed
sample for testing .csv	03/16/2010	587	Processing...
sample for testing .csv	03/16/2010	587	Processing...
template.csv	03/15/2010	5	03/15/2010
template.csv	03/15/2010	5	03/15/2010
sample for testing .csv	03/15/2010	587	03/15/2010
Undo template.csv	03/13/2010	26	03/13/2010
template.csv	03/13/2010	5	03/13/2010
Undo template.csv	03/13/2010	14	03/13/2010
template.csv	03/13/2010	5	03/13/2010
Undo template.csv	03/12/2010	63	03/13/2010
template.csv	03/12/2010	5	03/12/2010
template.csv	03/12/2010	4	Processing...
template.csv	03/12/2010	5	03/12/2010
template.csv	03/12/2010	5	03/12/2010
template.csv	03/12/2010	5	03/12/2010
sample for testing v2.csv	03/12/2010	587	03/12/2010
sample for testing v1.csv	03/12/2010	587	03/12/2010
sample for testing .csv	03/12/2010	587	03/12/2010
sample for testing .csv	03/12/2010	587	03/12/2010
sample.csv	03/12/2010	587	03/12/2010
sample.csv	03/12/2010	587	03/12/2010
rs test upload template.csv	03/12/2010	53	03/12/2010
rs test upload template.csv	03/12/2010	53	03/12/2010

Frequently Asked Questions

This is awesome! How can I have access to this all year long?
The Upload Wizard can be purchased as an eMerge Essentials contract for $1000 per year. This gives you unlimited access to use the tool whenever you'd like.

How can I go back and change something once I'm using the Wizard?
You cannot go "back" once you've begun work in the Wizard. However, you can cancel what you have done so far to abort your update and start over.

Can I remove (delete) a list once I've uploaded it?
To delete a list from eMerge, contact TRG with the buyer type, year, and event description of the list. "Undo Upload" will only reverse an upload that replaced another list, not delete a list from eMerge.

Why does eMerge say my full name field is blank when it has data in it?
If you used a calculation in Excel to create a full name field, you must turn that formula into data prior to uploading. eMerge will not except a formula. Copy and "paste special" to turn the formulas into values.

How fast do the lists appear in eMerge after upload?
eMerge updates are queued up in the order they were uploaded. Because eMerge only updates with new data overnight and on weekends, your list may appear the next day or may be up to five business days. You will receive an email when your list is ready for your use.

How can I add data to an existing segment without deleting what is currently there?
You cannot simply add data to a segment in eMerge, it must be a replace. However, you can create an order in eMerge and download what is in the list currently and add to it. When you upload that list, it will replace what's in eMerge with the new, complete listing. This is especially useful for suppression lists (Do Not Mail, Do Not Call, etc).