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.
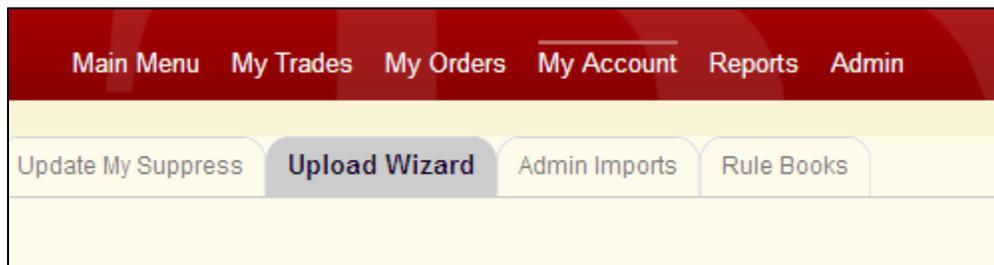
Click Start Wizard to begin.

Step 1: Prepare File

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

Step 1: Prepare File Prepare data and click Next	Step 2: Upload File Select your file and click Next	Step 3: Review Upload Verify the contents of your file and click Next	Step 4: Assign List Assign File as an eMerge List and click Next	Finished Your file load is complete

Download the template and prepare data to the template format.

Note:

1. All fields must be named exactly as the template has named them. No additional fields can be accepted.
2. All records must include at least one of the following fields - others will be deemed invalid and not uploaded
   - Last name
   - Full name
   - Company name
   - Email address
3. Only one list may be uploaded at a time. Each list will be assigned as one emerge list (segment).

Step 2: Upload File

Step 1: Prepare File Prepare data and click Next	Step 2: Upload File Select your file and click Next	Step 3: Review Upload Verify the contents of your file and click Next	Step 4: Assign List Assign File as an eMerge List and click Next	Finished Your file load is complete

Click the Browse button to find your list. Click next to proceed.

Upload File: C:\Documents and Settings\Katie\Desktop\Upload Wi: [Browse.]
Formats that can be uploaded are xls (Excel 2003), csv (comma separated values), or txt (text, tab delimited).

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

Upload File: C:\Documents and Settings\Katie\Desktop\Sample for [Browse...]
Formats that can be uploaded are xls (Excel 2003), csv (comma separated values), or txt (text, tab delimited).

Once you have selected the file, click Next.

[Cancel Upload]   [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.

Step 1: Prepare File	Step 2: Upload File	Step 3: Review Upload
Prepare data and click Next	Select your file and click Next	Verify the contents of your file and click Next

Ensure the data you uploaded has met all criteria.
Records must have Last Name or Full Name or Company Name or Email

Review the chart below for any largely blank fields. If a field has a high percentage of blank data, you may wish to cancel the upload and review the file prior to proceeding. Click next when you are ready to proceed.

Number of records in file: 587
Number of records not imported: 0
Number of records imported: 587

Percent of records with blanks in each field:

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.

Step 1: Prepare File Prepare data and click Next	**Step 2: Upload File** Select your file and click Next
Step 3: Review Upload Verify the contents of your file and click Next	**Step 4: Assign List** Assign File as an eMerge List and click Next
Finished Your file load is complete	

Assign File as an eMerge List

Each file may be assigned as a single eMerge list (segment)

Would you like to: ⦿ **Replace an existing List**   or   ◯ **Add a new list**

Existing List

Note: Selecting a list below will completely replace the existing list in eMerge.
All data currently in the existing list in eMerge will be deleted in favor of this new list.

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

Cancel Upload   **Next**

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.

| Step 1: Prepare File Prepare data and click Next | Step 2: Upload File Select your file and click Next | Step 3: Review Upload Verify the contents of your file and click Next | Step 4: Assign List Assign File as an eMerge List and click Next | Finished Your file load is complete |

Upload Complete!

Your upload to the eMerge queue was successful.

You will be notified by email when your list has been loaded into your eMerge warehouse.

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.

Previously Uploaded Files

Files uploaded between 03/10/2010 to 03/16/2010 [Filter]

Legend ● Upload complete ○ Upload processing ● Upload undone

		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

[File Statistics] [Undo Upload] [Download File]

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).