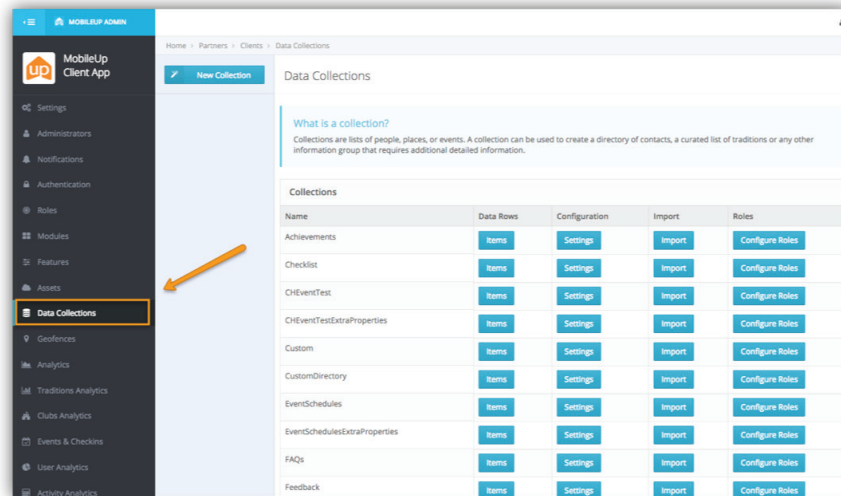


IMPORTING DATA

Learn how to organize and format membership and other data for inclusion in the MobileUp system by following these steps.

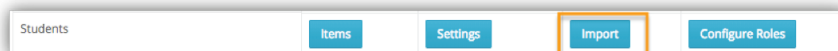
ACCESSING DATA COLLECTIONS

- 1) After you have logged into your MobileUp administrator tools, you can access the Data Collections section from the left-hand navigation. From here, you will have the ability to import data into your Data Collections.



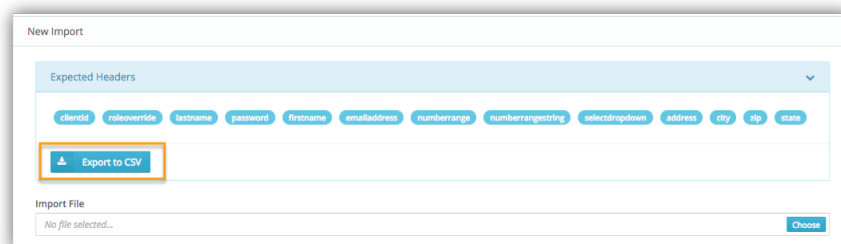
IMPORT PAGE

- 1) On the Collections page, you can access the Import tool by clicking on the **Import** button for the appropriate collection.

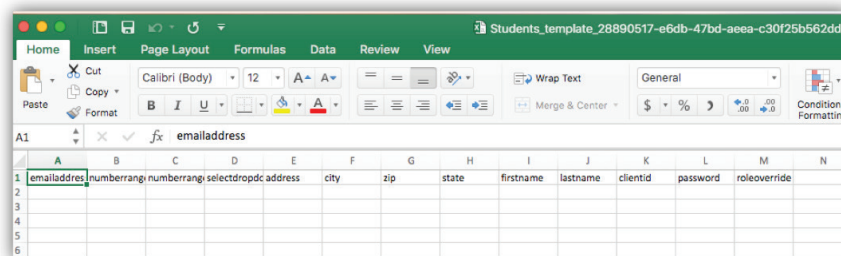


CREATING IMPORT FILE

- 1) If you are unsure of the column headers, you can export the Data Collection's template by clicking the blue **Expected Headers** bar then click the **Export to CSV** button.



- 2) A comma separated file (“csv”) file will be downloaded that contains the collection's column headers.



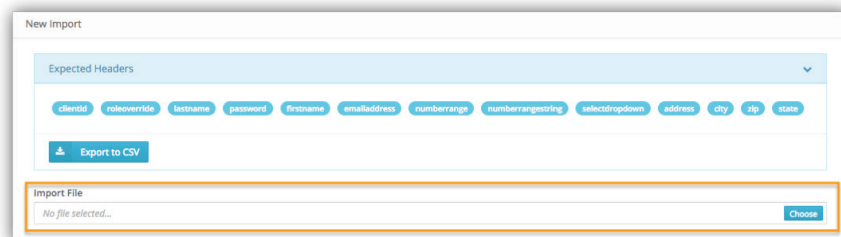
- 3) Populate the csv with your data matching the column headers. Be sure to save the file as a csv. Our system will only import files that have the “.csv” file extension.

New or Existing Member Records? The KEY VALUE (usually clientid or memberid) is the field that determines whether a new record will be created. If you are updating an existing member record, the system will update the record with the matching key value. If a matching key value does not exist, a new record will be created. This is how the system allows record updates without creating duplicate records.

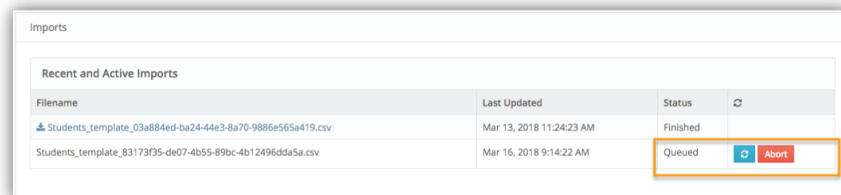
Please contact your account manager or support@mobileupsoftware.com if you are unsure which field is your KEY VALUE.

Note: Excel tends to strip out leading zeros from data files so it is important that you reformat your member ID with leading zeros before you save and close the file.

- 4) Once you have formatted your data file, click the **Choose** button and select the appropriate file from your computer.



- 5) Your import will appear in **Recent and Active Imports**. The data file processes automatically but could take anywhere from a few minutes to hours, depending on the size of the file. You will see **Queued**, **In Progress**, or **Finished** under the **Status** column.



- 6) You also can **Abort** the import before it is complete.