How To (Upland Mobile Commons)
Create and Update and "Upload Group"

This "How To" document will cover how to create an "Upload Group." To learn more about "Groups" please review: "Upland Mobile Commons 101: Groups: List Segmentation"

"Upload Groups" are utilized for two purposes:

● <u>Imports</u>: Excel/CSV File imports are used to update the existing organization's subscriber opt-ins and subscriber profile information.

● <u>Targeted Lists</u>: This is often an Excel/CSV import that is a smaller subset who need to be messaged for a particular purpose.
  ○ *Examples:* Conference Attendees, Planning Committees, Volunteers or Staff.

STEP BY STEP PROCESS:

Step #1: Create your CSV file

● **Make a COPY of the templated Google Drive or Excel template** and rename appropriate with naming conventions for your organization. Examples

My Drive > DIGITAL ADVOCACY > Mobile > PP Employees Account ▾

Name
Export
Import
imp_YEARMODA_CurrentPPFAStaff_Update_TEMPLATE
imp_YEARMODA_FormerPPFAStaff_Suppression_TEMPLATE

● **Download as a CSV**: Before or after updating the spreadsheet in Google Drive go to - File → Download as → Comma-separated values (csv., current sheet)
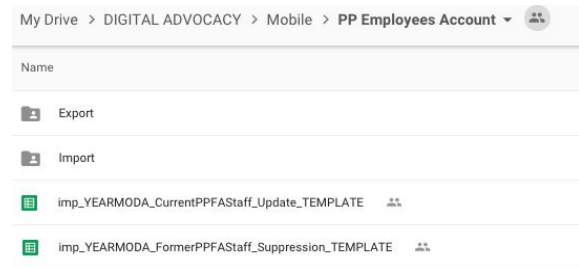
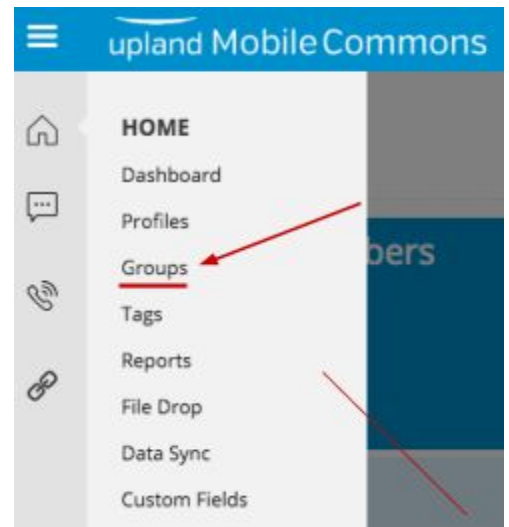|	A	B	C	D	E	F	G	H	I
	phone_number	first_name	last_name	email	street1	street2	city	state	postal_code
	(888) 444-7877	Jane	Doe	jane.doe@gmail.com	1 Smart Fox Drive	Apt. 202	Washington	DC	20002

● **Updates require at a minimum an opt-ins mobile phone number,** but if information for additional fields is available it is suggested you include them in your upload.
  ○ See a breakdown of Fields/Custom Fields on the first page of this "How To" or in the template.
  ○ Make sure you create any necessary "Custom Fields" in the platform, before uploading your data.

● **Header Row:** Make sure your header row matches the template.

● **Double check your spreadsheet:**
  ○ Make sure **every record has a "Phone_number"** and it is in one of the accepted formats: (123) 456-7890 **OR** 123-456-7890 **OR** 1234567890
  ○ If a number has less or more than 10 digits it will not be accepted.
  ○ INTERNATIONAL NUMBERS will not be accepted since they cannot be messaged to in Mobile Commons. ONLY U.S. Mobile Numbers.
  ○ Landlines will be accepted, but marked by Mobile Commons as "Undeliverable" after the first SMS message is sent out.

Step #2: Login to Mobile Commons → Groups

LOGIN URL: https://secure.mcommons.com/login

Step #3: Either (A) "Make a New Group" or (B) Update Existing Group

Both of these are similar enough processes, but with a few minor differences. Creating a new group will primarily be used for the creation of targeted groups. While updating an existing group will typically be used to maintain/update a larger primary group of opt-ins.

(A) MAKE A NEW GROUP:

1. NAME IT - Using the same naming conventions used for your CSV file.

2. UPLOAD THE CSV FILE: Click the "Choose File" Button and select the CSV file you created. And then hit the "Preview Group" Button on the bottom right.

3. FINAL REVIEW BEFORE CREATING GROUP:

You'll be told how many "Members" are in the spreadsheet you just uploaded. You'll also be told whether there are any errors in the spreadsheet that might prevent the upload from going through correctly, and provided an option to go back to the last step, update your spreadsheet and the reupload.

Once you are satisfied with the number of "members" matching the number of records from your spreadsheet you'll hit the "Create Group" button.

4. ALL SET! The final "Group" screen should specify how many "Profiles" are in the group vs. how many are subscribed and also include a "Created" date and will ultimately include dates of whenever additional profiles or updates are made to this group.

5. LAST STOP: SUBSCRIBE TO A CAMPAIGN:
Lastly, if uploading new subscribers who have not yet received a message from you, make sure to subscribe them to a campaign via an opt-in path.

- Select the organization's primary opt-in path during an optimal time of day for any timezone.
- Opt-in paths appear as dashes below each campaign they are associated with.

You can easily add all unsubscribed members of this group to one of your campaigns. Just select the desired campaign or opt-in path and click "Subscribe".
- If you select a campaign, no text messages will be sent
- If you select an opt-in path, **text messages will be sent immediately**
- Previously opted-out users will NOT be subscribed
- This may take a while for very large groups

✓ -- Manually Subscribe to Campaign --
Affiliate: AFT Texas
Affiliate: AFT Washington
Affiliate: AFT West Virginia
Affiliate: Houston Federation of Teachers (TX)
- MLK Day Parade 2019: "Thanks for supporting Houston Federation of Teachers at t..."
Affiliate: Pittsburgh Federation of Teachers - PFT400 (PA)
Affiliate: United Teachers of Los Angeles (CA)
- UTLA: "Thanks for standing with Los Angeles educators! Are you a..."
- UTLA Strike C2C 1-16-19: "Thanks for supporting LA students & teachers. Reply CALL ..."
Affiliate: Wilmington Clown College (DE)
AFT National
- General AFT Opt-In: "Welcome to AFT Mobile! To stay updated on important issue..."
Hogwarts Federation of Teachers

[Subscribe]

*Don't add people to an opt-in path early in the morning or at night.

Opt-In Paths are those with dashes - under each campaign.

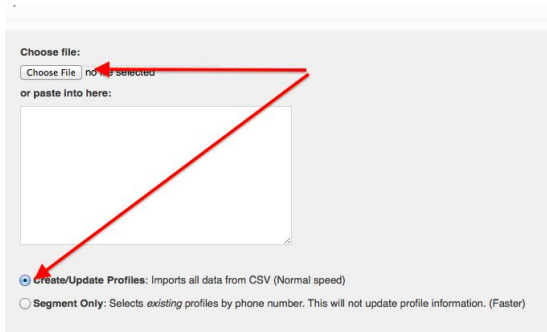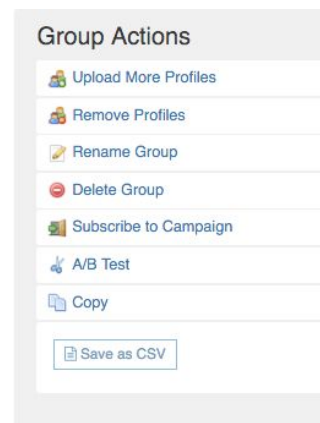Adding to a campaign does not trigger a text message or opt-in path. It just subscribes them.

- IF THEY ARE ALREADY SUBSCRIBED and are receiving texts, but you want to add them to another campaign. You can simply select the campaign you want them subscribed to.

(B) UPDATE A GROUP:

[Make New Group] [CSV Template] [Filter 🔍]

1. SEARCH for the group you want to update. The search function for "Groups" is the box that says "Filter." The groups are also in alphabetical order.

2. UPLOAD: Once you've selected the group and are on the specific group's page, under "Group Actions" select "**Upload more profiles.**"

Group Actions
- Upload More Profiles
- Remove Profiles
- Rename Group
- Delete Group
- Subscribe to Campaign
- A/B Test
- Copy
- Save as CSV

Choose file:
[Choose File] no file selected
or paste into here:

◉ Create/Update Profiles: Imports all data from CSV (Normal speed)
○ Segment Only: Selects *existing* profiles by phone number. This will not update profile information. (Faster)

Then Click the "**Choose File**" Button and select the CSV file you created. And then hit the "Preview Group" Button on the bottom right.

3. **FINAL REVIEW BEFORE CREATING GROUP:** You'll be told how many "Members" are in the spreadsheet you just uploaded. You'll also be told whether there are any errors in the spreadsheet that might prevent the upload from going through correctly, and provided an option to go back to the last step, update your spreadsheet and the reupload.
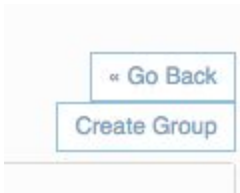

Once you are satisfied with the number of "members" matching the number of records from your spreadsheet you'll hit the "Create Group" button.

4. ALL SET!

The "Group" page should specify how many "Profiles" are in the group vs. how many are subscribed.

The "Created" date and will ultimately include dates of whenever additional profiles or updates are made to this group.