



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"

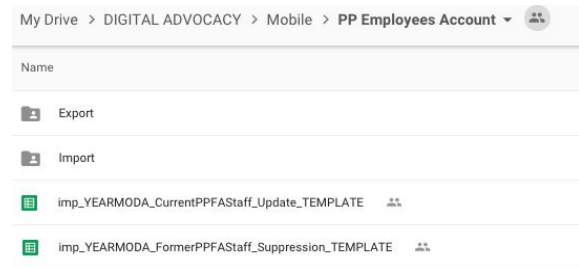
"Upload Groups" are utilized for two purposes:

- **Imports:** Excel/CSV File imports are used to update the existing organization's subscriber opt-ins and subscriber profile information.
- **Targeted Lists:** 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
- **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

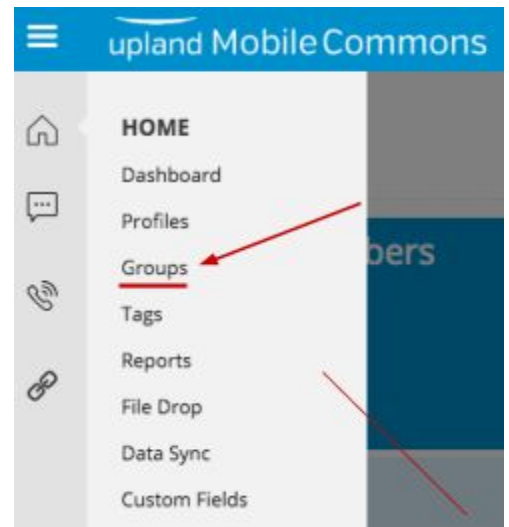
- **Updates require at a minimum an opt-ins mobile phone number**, but if information for additional fields is available it is suggested you include them in your upload.
 - See a breakdown of Fields/Custom Fields on the first page of this "How To" or in the template.
 - Make sure you create any necessary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

A screenshot of the Mobile Commons Groups page. The page shows a list of groups with columns for Group, Approx Size, and Updated. A red arrow points to the "Make New Group" button in the top right corner of the page.

Group	Approx Size	Updated
20120905_Convio_Mobile Uploaded Group	16,492 Profiles 12,217 are subscribed	9/5/2012 4:42PM EDT Created: 9/5/2012 3:44PM EDT
2013 test list Uploaded Group	4 Profiles All are subscribed	2/27/2014 4:44PM EST Created: 12/31/2013 1:15PM EST
9/30/13 c4 list Filtered Group	15,898 Profiles All are subscribed	9/30/2013 8:30PM EDT Created: 9/30/2013 8:30PM EDT

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

A screenshot of the Mobile Commons "Create a New Group" form. The form has a "Name" field with a red arrow pointing to it and the text "Use naming conventions for CSV file." below it. There are two radio buttons for "Create Group by": "Using filters to select profiles (Group updates automatically)." and "Uploading a CSV file of phone numbers with this template (Group does not update)". The "Uploading a CSV file" option is circled in red. At the bottom right, there is a "Create" button with a red arrow pointing to it.

Home > Groups > New Group

Create a New Group

Name

Use naming conventions for CSV file.

Create Group by

Using filters to select profiles (Group updates automatically).

Uploading a CSV file of phone numbers with this template (Group does not update).

Cancel Create

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.

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)

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.

Group - Preview

Creating this group will:
+ 1234 567 8901 2345

Previewing Group: 1 Member

Members

0 Members

User Profile	Address	Custom Profile	First Seen
Member's Name	Street Address Washington, DC 200	Affiliate: Employee (No) National Office: DC Organization: ABC Text Received: None Work or Personal: Personal	Uploaded to org: 3/1/2022, Current: 3/1/2022, Status: NEW STAFF LIST 85004452284222

Group Actions

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

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

« Go Back
Create Group

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

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

✓ -- 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

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.

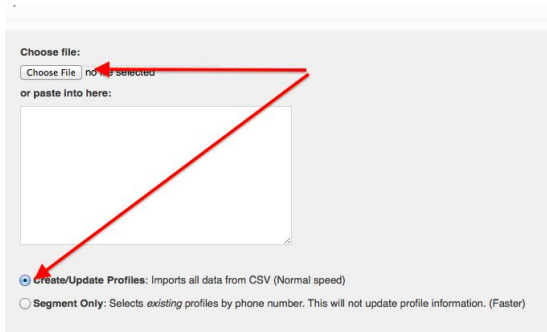
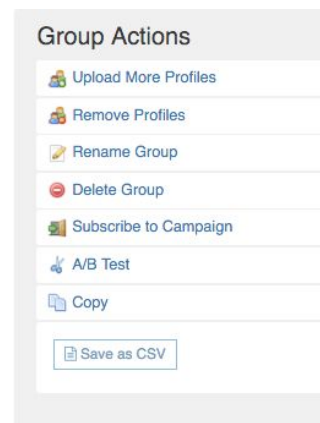
- IF THEY ARE ALREADY SUBSCRIBED and are receiving texts, but you want to add them to another campaign. You can simply select the campaign you want them subscribed to.

(B) UPDATE A GROUP:



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.**”



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.

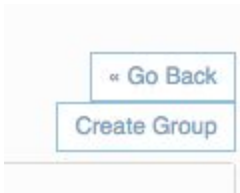
Group : Preview

✔ **Creating this group will:**
 • Look for 1 row to add.

Previewing Group: 1 Member

Members

1 Members			
User Profiles	Address	Custom Fields	First Seen
1-845-304-8269 Alexandra Fox alex@foxipg.com Active Subscriber	Street Address Washington, DC Zip	Affiliate Employee: No National Office: DC Organization: PPFA Text Received: None Work or Personal: Personal	Uploaded in Imp_20140908_CurrentPPFASubstf_Update_NEW STAFF LIST 9/8/2014 5:28PM EDT



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.

C4 Suppression - Updated 2.2.16

Name:	C4 Suppression - Updated 2.2.16
Type:	Uploaded
Profiles:	Approx 40,734 Profiles (Recalculate) 14,184 are subscribed
Created:	3/2/2015 3:59PM EST <i>2/2/2016 5:24PM EST: Added 3,400 new profiles to company</i> <i>9/28/2015 10:07PM EDT: Added 7,183 new profiles to company</i> <i>3/2/2015 3:58PM EST: Added 204 new profiles to company</i>