

ALI LIST BUILDER IMPORT

Ali List Builder Import allows users to import outside contact lists. This feature finds the matching constituent record lookup IDs in Ali CRM so that the list can be used with Emma and AlumniIQ, the email and event tools. The **Import** feature is on the **Constituent Filters** tab on any Ali List Builder list. Any contacts that don't exist in Ali CRM can then be added.

Prepare the Import File

1. Open the list in Excel.
2. Use these required column headers:

First Name | **Last Name** | **Email address** | **Phone** | **Address Line 1** | **City** | **State** | **ZIP**

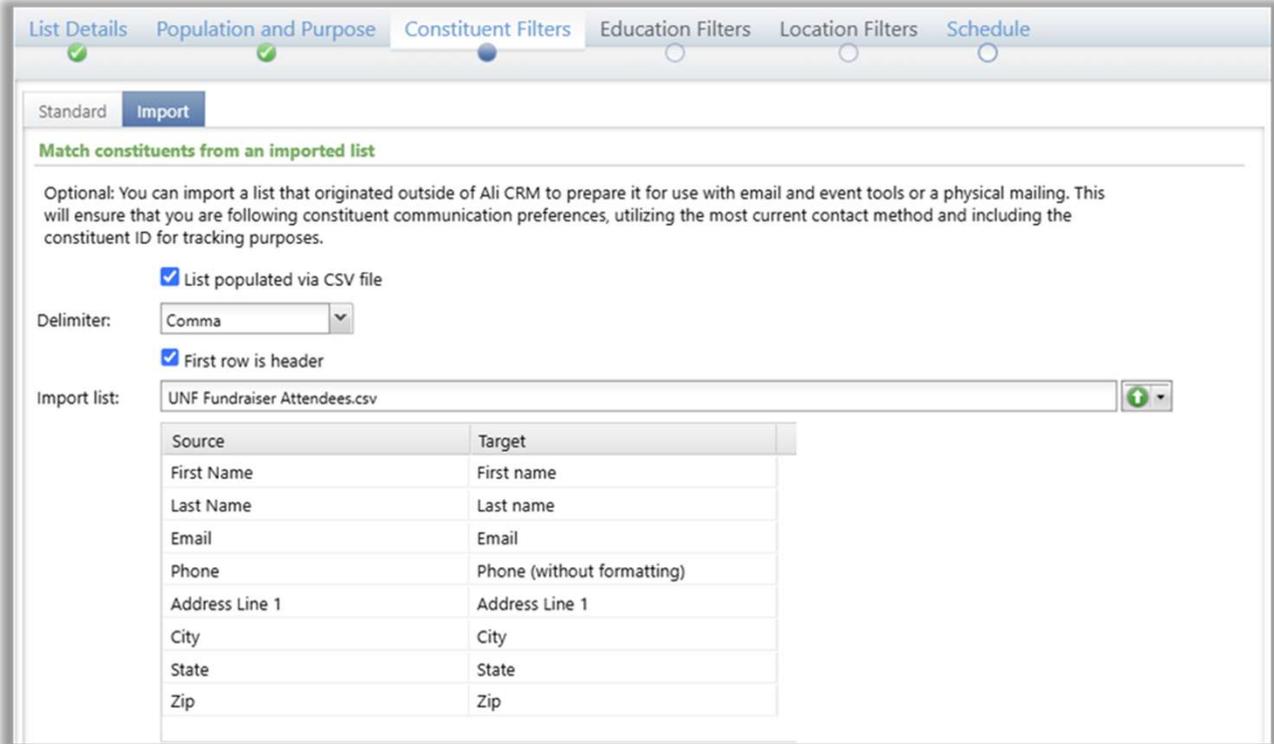
Ali List Builder will match constituents if one of the following conditions is met:

- First Name + Last Name + Email address
- First Name + Last Name + Phone
- First Name + Last Name + Address

3. Save the file in CSV format. This is important, as the XLS or XLSX formats cannot be imported.

Import the File to Ali List Builder

1. Open Ali List Builder.
2. Click the green +symbol to add a new list.  Add
3. Complete the List Details and Population and Purpose steps.
4. On **Constituent Filters**, click the **Import** tab.
5. Check the box for **List populated via CSV file**.
6. Use the green up arrow next to the **Import List** box and find your CSV file.
7. Match the Source column fields to the Target fields.



Standard | Import

Match constituents from an imported list

Optional: You can import a list that originated outside of Ali CRM to prepare it for use with email and event tools or a physical mailing. This will ensure that you are following constituent communication preferences, utilizing the most current contact method and including the constituent ID for tracking purposes.

List populated via CSV file

Delimiter:

First row is header

Import list: 

Source	Target
First Name	First name
Last Name	Last name
Email	Email
Phone	Phone (without formatting)
Address Line 1	Address Line 1
City	City
State	State
Zip	Zip

Review the Imported Data

1. Click the **View data** button.
2. Review the data in each column and check for errors.
 - a) Ensure the data in each column matches the information type. If the source file data contains commas, it could shift into an incorrect column.
 - b) Errors will be highlighted with a yellow caution symbol.  Common errors are improperly formatted email addresses or text in number fields.
3. If changes are made to the source file data, clear the original import and import the corrected file.
 - a) Close the **Import Data** form.
 - b) On the Import page, click the down arrow next to the green import arrow button and click “Clear”
 - c) Import the corrected file and review the data. Repeat until there are no errors.



4. Click the blue **Save** button.
5. Click **Refresh the list**.
6. After the list is refreshed, navigate to the **List Results** tab, then the **Imported Records** page.

Imported records (4)  More ▾

Include: **Matches and exceptions** ▾ |  Apply  Reset

Search  Columns ▾  Save list  Open list  Clear all filters

Matched looku...	Matched constit...	Match %	First name	Last name	Email address	Pho
		0	Deborah	Johnson	deborah.johnson@...	
	597224	70	Kerry	Acker	kerry.acker@nufou...	
	685277	70	Ashley	Wagner	ashley.wagner@nu...	
	215549	60	Christina	Provost	christina.provost@...	

7. Any names with exceptions can be manually matched. Change the **Include** filter to **Exceptions Only** and click **Apply**.
8. Click the double green chevron button to reveal both the **Review matches** and **Edit** functions.



- a) Start with **Review matches**. If one of the records are the correct constituent, click  **Select record as a match**. Click **Save**. If none of the potential matches are correct, click **Cancel**.
 - b) If the above step didn't find the correct constituent, click **Edit**. The **Edit import record** page will open. Type the person's name in the Constituent search box and click the magnifying glass to search. Constituent: Potential matches will be displayed in the Results window. If one of the constituents in the Results is the correct constituent, select that one, then click **Save**. Otherwise, click **Cancel** and then **Cancel** again.
 - c) If a matching constituent was selected and saved, the constituent will now display in the **Recipients** tab.
9. Optional last step: Export the list of people that didn't have a match. Request to have constituent records created for them by sending an email to biographicalrecords@nufoundation.org.

For further assistance or questions, please email alicrm@nufoundation.org.