

Quick Sheet MN: Managing Member Data

Contacts Tab

The Contacts Tab is the home of the recipient management portal. From this page you can edit individual contacts (click the pen), delete contacts (click the trash can), assign members to groups, download a CSV of the current database, create new contacts, and complete a search for an existing contact in the system. Contact management is live, any changes made are reflected immediately in the database that is used for notifications.

First Name	Middle Initial	Last Name	Suffix	External ID	Record Type	Last Modified Date	Last Modified By
Walter		Adams		989999	Employee	2013-03-29 11:47:09 PST	Andrew Evangelos
Walter	T	Ave		989999	Employee	2013-01-28 08:23:06 PST	Andrew Evangelos
Tim		Boss		BoboConsultants	Consultant	2013-01-25 13:49:43 PST	Andy Evangelos
Michael		Bobson		Wolton	Employee	2013-01-23 12:32:37 PST	Andy Evangelos
David		Dearing		Indeck1	Consultant	2013-03-13 11:55:33 PST	Andrew Evangelos
David		Del Rio		DelRio@delrio.com	Employee	2013-03-07 10:39:40 PST	Andrew Evangelos
Lisa		Durel		DurelLisa@everbridge.com	Student	2013-03-22 10:20:25 PST	Andrew Evangelos
Lisa		Durel		lisa.durel@everbridge.com	Student	2013-03-13 14:52:12 PST	GFTP
Andrew		Evangelos		21462204932295531	Employee	2013-03-29 11:10:44 PST	Andrew Evangelos
Andrew		Evangelos		728957E+8	Administrator	2013-03-29 11:10:44 PST	Andrew Evangelos
Clare		Evans		stee982394	Employee	2013-03-12 15:26:25 PST	Andrew Evangelos

Editing/Creating a Contact

From the contact settings you can easily add or edit existing contacts. Here are some notes on some of the data fields:

- ExternalID and Record type are required fields, ExternalID must be unique for everyone in the system.
- Addresses will automatically geocode, you will need to select the formatted address from the dropdown box. You can add up to 5 addresses per contact.
- Contact paths can be added and device order set
- Additional Information fields can also be added one at a time.

Make sure to click save after all changes are made to a contact.

General information

First Name * Last Name *

Middle Initial

Suffix

External ID *

Record Type *

Country

Address information

Location Name *

Country *

Address *

Apt/Suite/Unit

City

State/Province

Postal Code

Select Address

Location

Longitude Latitude

[Find location on map](#)

[Add another address](#)

Preparing an Upload File

Adding and editing contacts one at a time is possible, but it is not an efficient way to add contacts into the system. You will want to complete mass adds using a CSV file. You can download a template from the Uploads tab. Please note that First Name, Last Name, ExternalID and Record Type are required. The record type must match one that is in the settings (Employee is Default).

First Name	Middle Initial	Last Name	Suffix	External ID	Country	Business Record Type	Groups	Location	Street Address	Suite	City	State	Postal Code	Country
Employee 8919		Record 8919	ID-8919	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 8451		Record 8451	ID-8451	US	Employee US Region Work			Work At Home - Call Work At Home			California	US		
Employee 6470		Record 6470	ID-6470	US	Employee US Region Work			1800 Second Avenue Brentwood			New York	US		
Employee 6470		Record 6470	ID-6470	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 5474		Record 5474	ID-5474	US	Employee US Region Work			7100 M.L.King Jr Way Seattle			Washington	US		
Employee 5478		Record 5478	ID-5478	US	Employee US Region Work			200-270 Saw Mill Blv			New York	US		
Employee 7861		Record 7861	ID-7861	US	Employee US Region Work			Work At Home - Mail Work At Home			Delaware	US		
Employee 5671		Record 5671	ID-5671	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 7704		Record 7704	ID-7704	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 7709		Record 7709	ID-7709	US	Employee US Region Work			One Lakeside Plaza			Lake Charles Louisiana	US		
Employee 6704		Record 6704	ID-6704	US	Employee US Region Work			Work At Home - Web Work At Home			Wisconsin	US		
Employee 8082		Record 8082	ID-8082	US	Employee US Region Work			17900 Collins Blvd			Miami Beach Florida	US		
Employee 8093		Record 8093	ID-8093	US	Employee US Region Work			6532 West Carmel			Burney Illinois	US		
Employee 8095		Record 8095	ID-8095	US	Employee US Region Work			117 North 200 Service Station			Louisiana	US		
Employee 7728		Record 7728	ID-7728	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 7771		Record 7771	ID-7771	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 7920		Record 7920	ID-7920	US	Employee US Region Work			7765-7782 Bayberry Lakeside			Florida	US		
Employee 6555		Record 6555	ID-6555	US	Employee US Region Work			Work At Home - Bill Work At Home			Illinois	US		
Employee 6556		Record 6556	ID-6556	US	Employee US Region Work			Work At Home - Vlog Work At Home			Virginia	US		
Employee 6557		Record 6557	ID-6557	US	Employee US Region Work			Work At Home - Sou Work At Home			South Carolina	US		
Employee 6120		Record 6120	ID-6120	US	Employee US Region Work			Work At Home - Sou Work At Home			South Carolina	US		
Employee 6164		Record 6164	ID-6164	US	Employee US Region Work			300 Stanton Christian Newark			Delaware	US		
Employee 5161		Record 5161	ID-5161	US	Employee US Region Work			80-462 HWY 111			Indio California	US		

Uploading a Contact Data File

To upload a contact file click Upload to portal under the uploads tab. You will need to determine if you are doing an update or replace. An update will make any changes, a replace will replace all contacts with the same record type. With replace, if a contact is not in the new file, that contact will be deleted. After the upload is complete you can view the results by clicking the icon on the right. This will show the number of contacts loaded without error, with error, or not loaded due to a critical error. The errors will be displayed allowing you to make needed changes to your CSV file and uploading the file again to fix the errors.

File Name	External ID	File Size	Uploaded Date	Uploaded By	File Status	Records Received	Records Loaded
test.csv	5743857233438008	2784	2013-03-29 11:49:08 PST	Andrew Evangelos	Done/Loading	6	6
test.csv	5743857233438004	2788	2013-03-29 11:04:34 PST	Andrew Evangelos	Done/Loading	6	6
evang.csv	5743857233438061	4368	2013-03-26 08:48:01 PST	Andrew Evangelos	Done	6	6
evang.csv	5743857233438060	4368	2013-03-26 08:46:22 PST	Andrew Evangelos	Done	6	6
Cadbury Librarian.csv	5743857233438050	4577	2013-03-18 11:08:28 PST	Andrew Evangelos	Done	18	18
LM SYSTEM Everbridge M Demstration Profile.csv	5743857233438280	1963				6	
CSVTemplate (1).csv	5743857233438248	100				1	
CSVTemplate (1).csv	5743857233438248	100				1	
CSVTemplate (1).xlsx	5743857233438247	8023				1	
stew k upload.csv	5743857233437911	1438				1	
NA Corporate 400.csv	5743857233437469	84026				414	
NA Upload_BK.csv	5743857233437360	628724				315	
NA Upload_BK.csv	5743857233437359	628701				315	
NA Upload_BK.csv	5743857233437357	628701				284	