

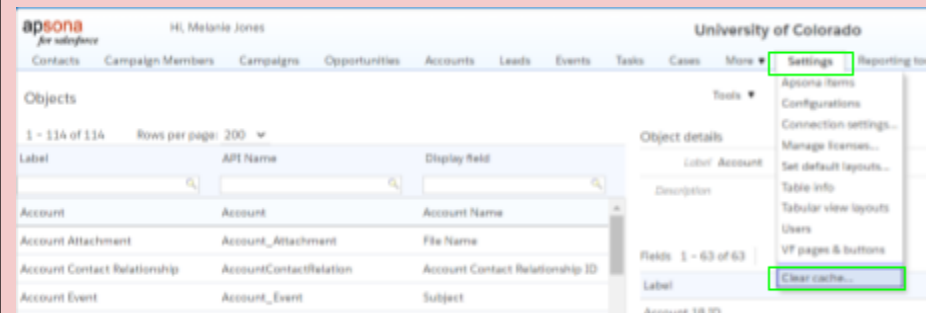
# HOW TO MATCH EXISTING CONTACTS AND ADD THEM TO A CAMPAIGN USING APSONA

## ['Cleanup' List for Processing](#)

In the **Campaign Members** tab of **Apsona**, you can add Contacts (as Campaign Members) to a Campaign using any of the following fields to match:

- **ID Numbers**
  - Contact ID (15 digit)
  - Student ID (SID)
  - Advance ID (EID)
    - *!TIP! Advance ID must be in a 10 digit format to match in Salesforce*
  - Employee ID (EmpID)
- **Email Addresses**
  - Email
  - UCB Email
  - UCD Email
  - UCCS Email
  - SYS Email

For best matching results, **clear the Apsona cache before each use**. This ensures you are getting the most current version of Apsona along with matching against the most current data in Salesforce.

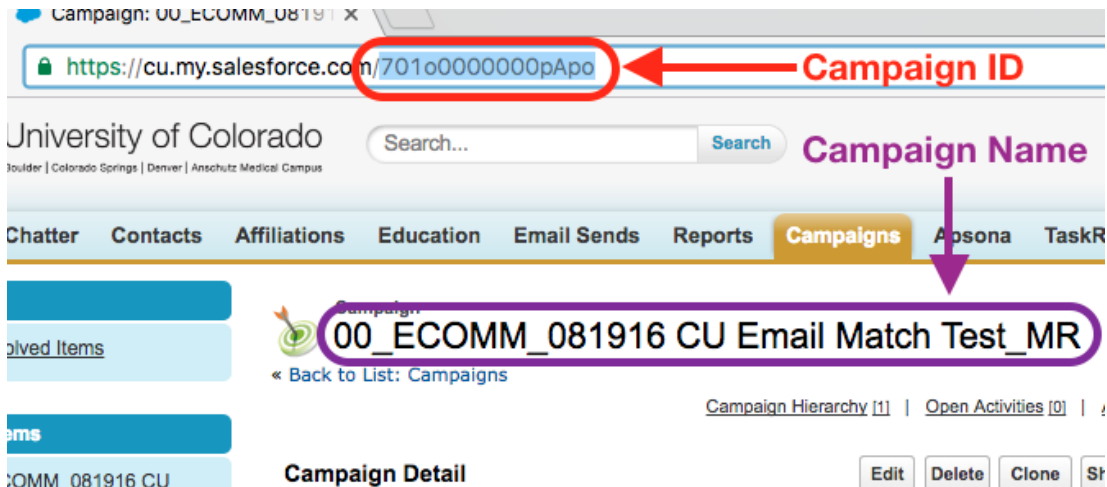


For the cleanest matching, **remove duplicates in your spreadsheet before importing in Apsona cache before each use**. This can minimize confusion and unnecessary troubleshooting.

1. Prepare your import spreadsheet by adding **three required columns** to your data:

- Campaign ID
- Status (*Sent*)
- Matching Criteria (an ID or Email Address; see above options)

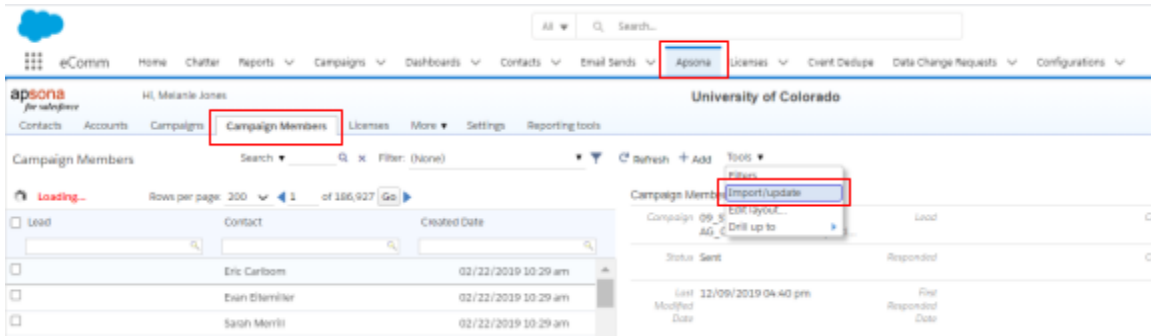
If your import file has other data (like First/Last Name) you can include these columns when importing. They will not be used during the import but will make troubleshooting any rejects much easier.



	A	B	C	
1	Contact ID	Campaign ID	Status	
2	<a href="#">003o000000X8Jo0</a>	701o000000iykK	Sent	
3	<a href="#">003o000000X9fr0</a>	701o000000iykK	Sent	
4	<a href="#">003o000000X9BEE</a>	701o000000iykK	Sent	
5				
6				

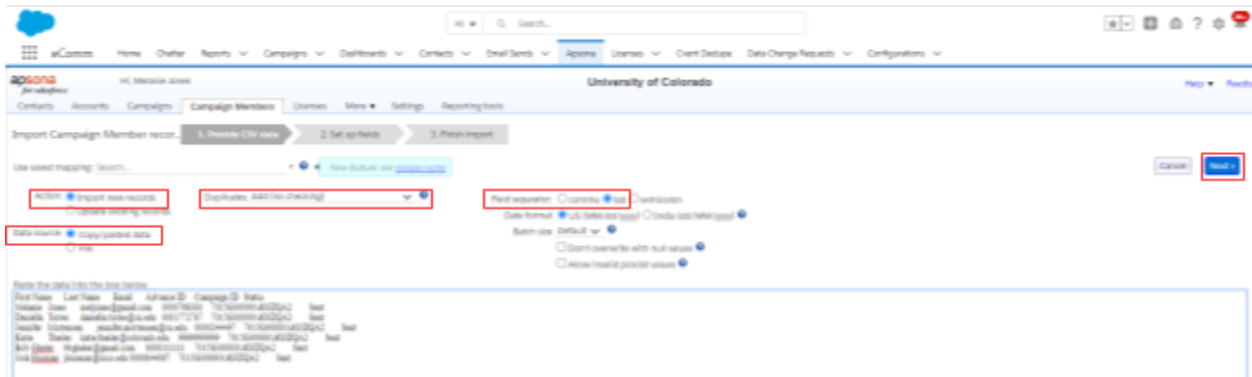
2. Login to Salesforce > Apsona

- You may need to add Apsona to your navigation.
- Select the **Campaign Members** tab
- Under Tools, select **Import/Update**



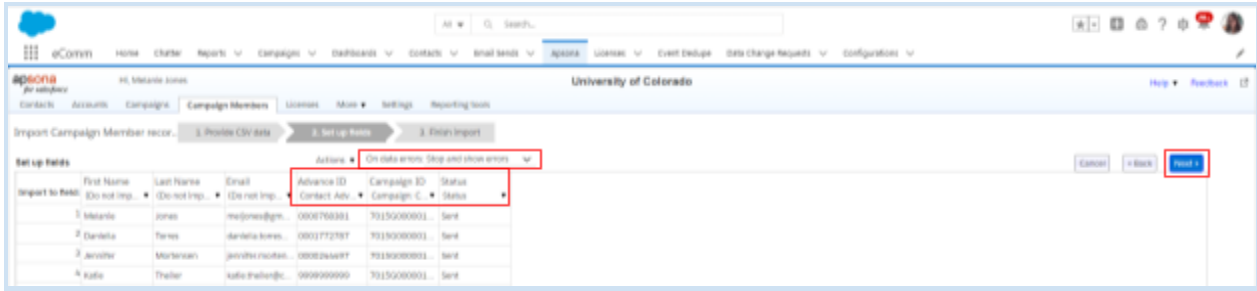
### 3. Complete Step One of Import Wizard | Provide CSV data

- Under Field separator, select **tab**
- Under Duplicates, select **Add (no checking)**
- Under Action, select **Import new records**
- Under Data source, select **copy/pasted data** radio button
- In text field, copy/paste all data from your spreadsheet (see step one above)
- Click **NEXT** (top right)

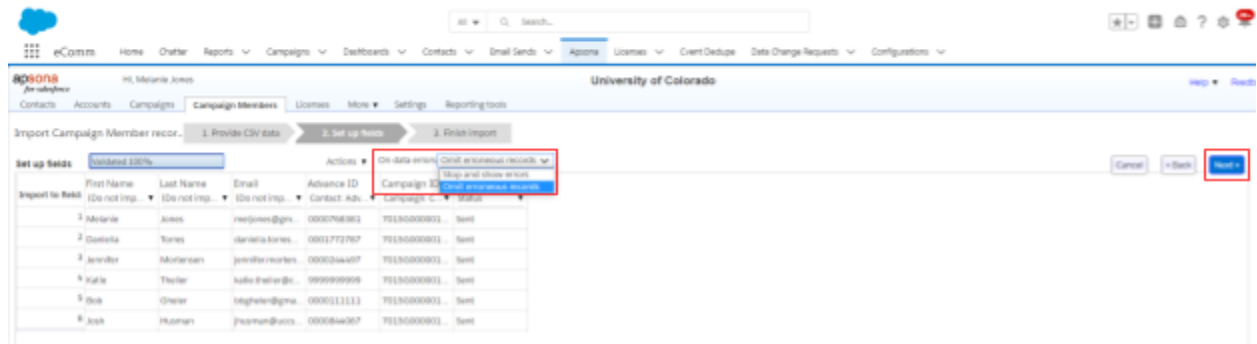


### 4. Complete Step Two of Import Wizard | Set up Fields Tab

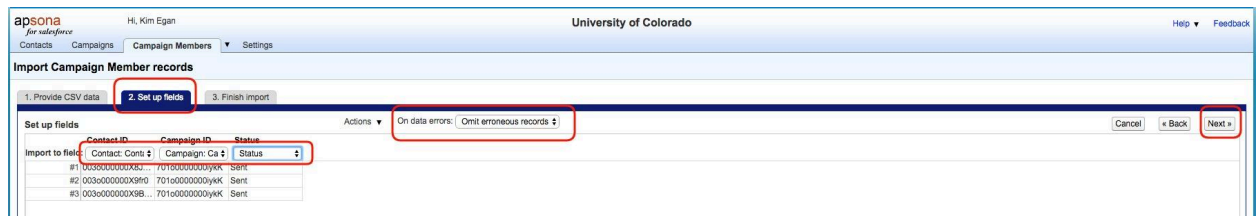
- First, map the columns from your spreadsheet to the proper Salesforce fields using the dropdowns above each column
  - **ID or Email:** select the ID or email field you wish to match against.
  - **Campaign: Campaign ID:** this column should automatically map to the correct field, but if not, select “Campaign: Campaign ID” from the dropdown.
  - **Status:** this column should also automatically map to the correct field, but if not, select “Status” from the dropdown.
- Click **Next** (top right) to confirm no errors exist.
  - Note: Once you click Next, Apsona will “Validate” your data before proceeding to the next step. This can take a while if your list is long, so be patient.



- Close the pop-up and update the **On data errors** dropdown to **Omit erroneous records**

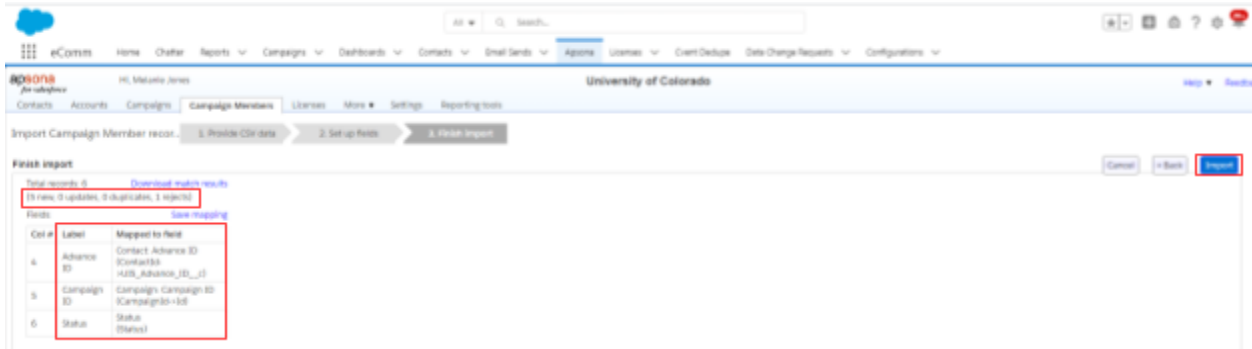


- Click **Next** (top right) to continue.
  - Note: Apsona will “Validate” your data before proceeding to the next step. This can take a while if your list is long, so be patient.



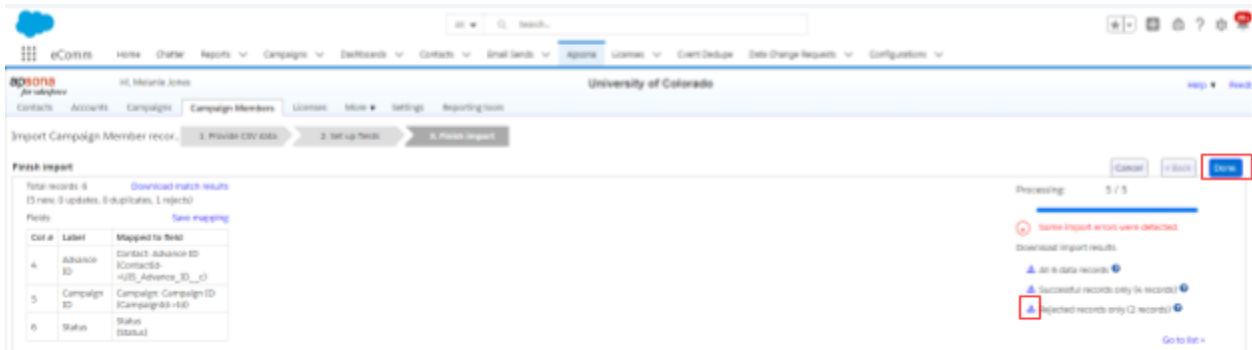
## 5. Review and Import | Finish Import Tab

- Having validated your data, Apsona will give you a summary of how many ID or email matches were found (**New**), as well as how many were not found (**Rejects**).
  - Review the number of **New** versus the number of **Rejects** to determine if you would like to continue with the import and add the matched contacts to your campaign.
  - Review the field mapping summary to ensure you selected the proper fields in step four above.
    - If you do not wish to proceed, or if you need to fix something in one of the previous steps, click **Cancel** or **Back** in the top right corner.
- To continue, click **Import** in the top right corner. As with the validation process in the previous step, the import process could take some time.



## 6. Download Results and Compare to List | Finish Import tab

- When the import is complete, Apsona will reveal new options for you to download the results.
  - In the **Download the results of this import** box, make sure the last option (**Rejected**) is selected, and click the **Download** button to download the CSV file.
  - Click **Done** (top right).



- It's worth scanning through the Rejected to determine the cause. It could mean Apsona:
  - did not find a match**
    - See if you can match the contact based on a different criteria. If you tried to match on Advance ID, next lookup email.
      - Once you are confident this contact does NOT already exist in Salesforce, you can:
        - [Upload a new contact\(s\)](#)
      - Repeat the steps above to add them to your campaign.
    - found multiple matches**
      - SOLUTION:** Use Salesforce global search to find all records and determine best match. Add to Campaign manually

- TIP! To identify those with multiple matches, use Conditional Formatting to highlight any cells containing the word “matches”.
- **the contact is already a Campaign Member**
  - SOLUTION: No action required

## 7. Validate Your Results

- Verify that the contacts have populated in the respective campaign.

### Other Apsona Documentation

- [‘CLEANUP’ LIST FOR PROCESSING](#)
- [ADD NEW CONTACTS TO SALESFORCE](#)