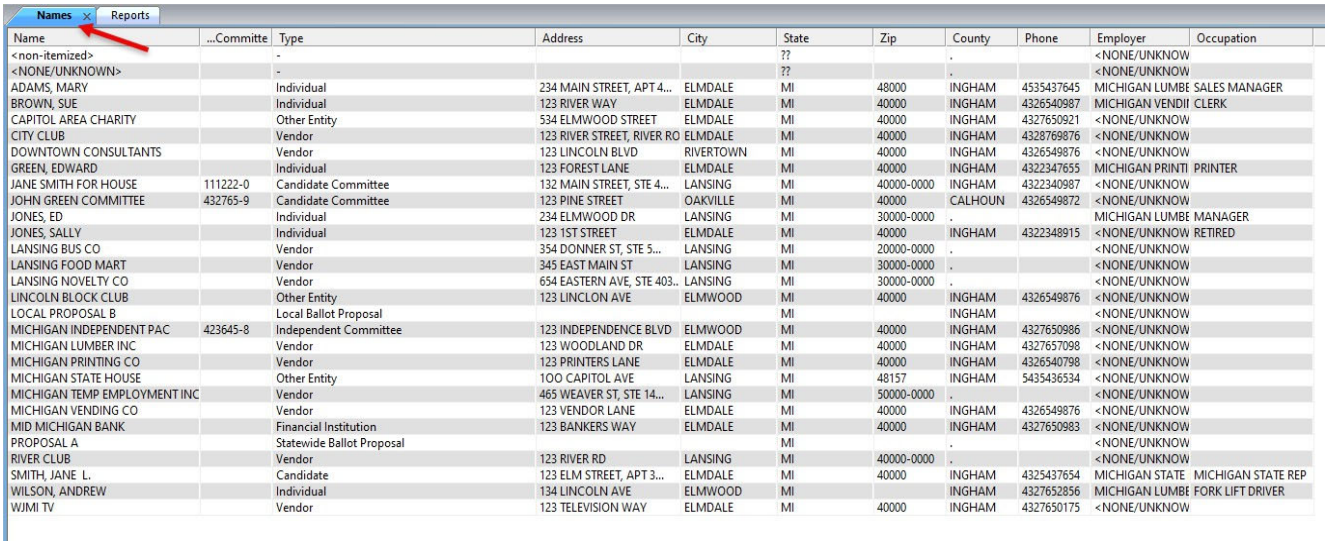
Exporting from MERTS Contact Importing to MiTN

MiTN has many great new features. We have made it possible for you to import your contact records from your MERTS file into MiTN to save time with data entry. This will also import the names with the employers which was a feature MERTS did not have.

Exporting Names from MERTS

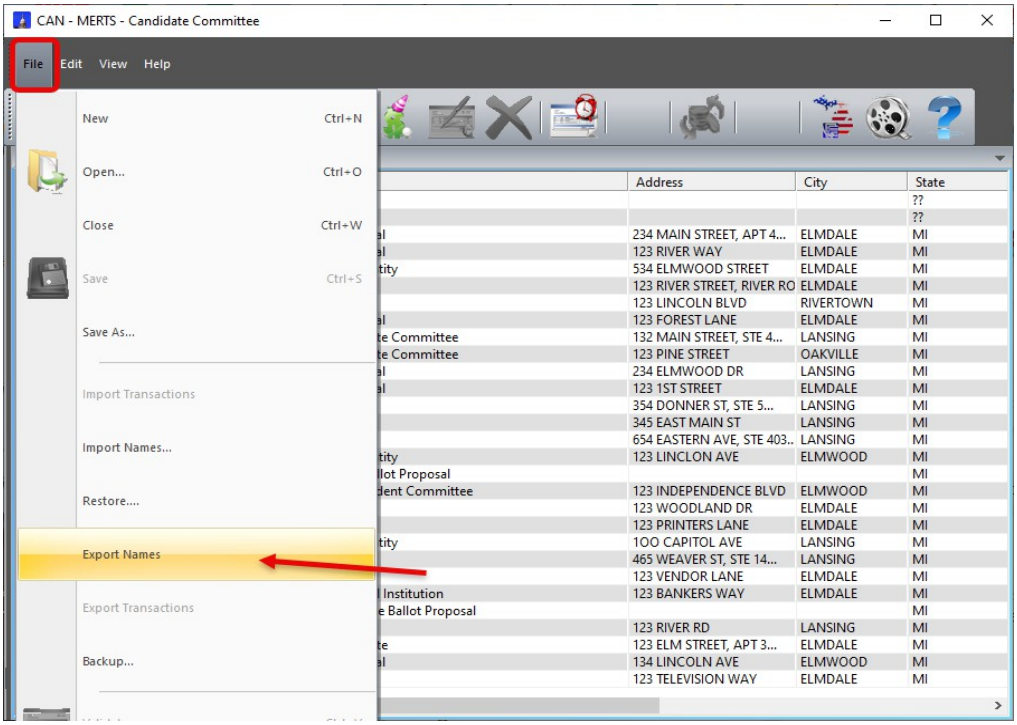
First let's open up your MERTS file and select the Names tab. Before we export our contact records there may be a bit of clean up. It is important to make sure your contact records are accurate and there are no duplicates.



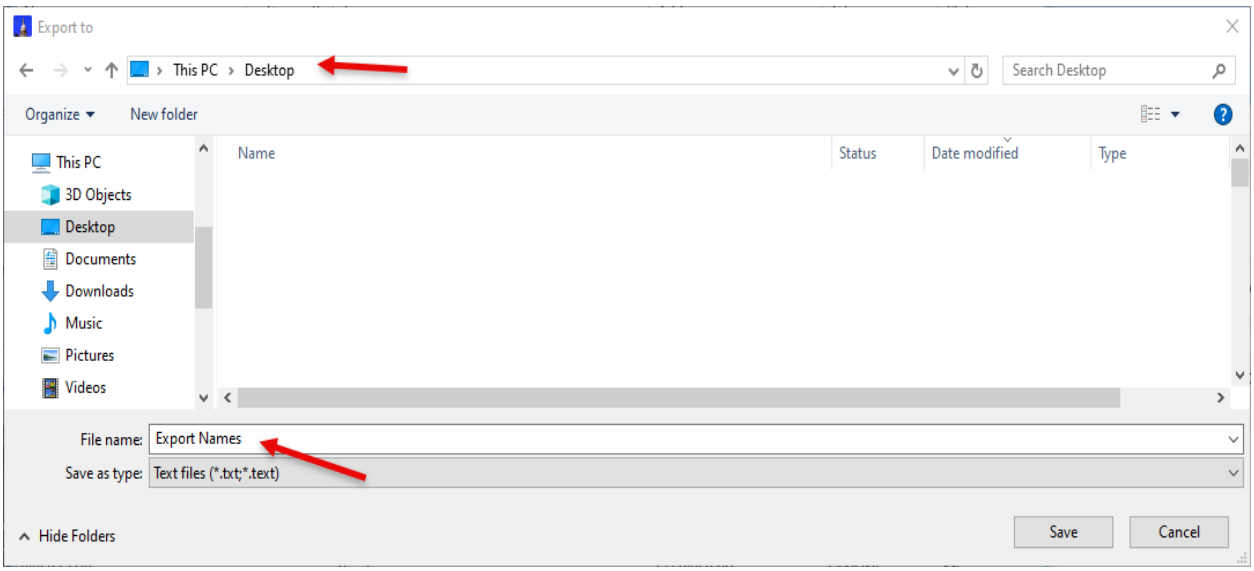
Names | Reports

Name	...Committe	Type	Address	City	State	Zip	County	Phone	Employer	Occupation
<non-itemized>		-			??		.		<NONE/UNKNOW	
<NONE/UNKNOWN>		-			??		.		<NONE/UNKNOW	
ADAMS, MARY		Individual	234 MAIN STREET, APT 4...	ELMDALE	MI	48000	INGHAM	4535437645	MICHIGAN LUMBE	SALES MANAGER
BROWN, SUE		Individual	123 RIVER WAY	ELMDALE	MI	40000	INGHAM	4326540987	MICHIGAN VENDII	CLERK
CAPITOL AREA CHARITY		Other Entity	534 ELMWOOD STREET	ELMDALE	MI	40000	INGHAM	4327650921	<NONE/UNKNOW	
CITY CLUB		Vendor	123 RIVER STREET, RIVER RO	ELMDALE	MI	40000	INGHAM	4328769876	<NONE/UNKNOW	
DOWNTOWN CONSULTANTS		Vendor	123 LINCOLN BLVD	RIVERTOWN	MI	40000	INGHAM	4326549876	<NONE/UNKNOW	
GREEN, EDWARD		Individual	123 FOREST LANE	ELMDALE	MI	40000	INGHAM	4322347655	MICHIGAN PRINTI	PRINTER
JANE SMITH FOR HOUSE	111222-0	Candidate Committee	132 MAIN STREET, STE 4...	LANSING	MI	40000-0000	INGHAM	4322340987	<NONE/UNKNOW	
JOHN GREEN COMMITTEE	432765-9	Candidate Committee	123 PINE STREET	OAKVILLE	MI	40000	CALHOUN	4326549872	<NONE/UNKNOW	
JONES, ED		Individual	234 ELMWOOD DR	LANSING	MI	30000-0000	.		MICHIGAN LUMBE	MANAGER
JONES, SALLY		Individual	123 1ST STREET	ELMDALE	MI	40000	INGHAM	4322348915	<NONE/UNKNOW	RETIRED
LANSING BUS CO		Vendor	354 DONNER ST, STE 5...	LANSING	MI	20000-0000	.		<NONE/UNKNOW	
LANSING FOOD MART		Vendor	345 EAST MAIN ST	LANSING	MI	30000-0000	.		<NONE/UNKNOW	
LANSING NOVELTY CO		Vendor	654 EASTERN AVE, STE 403..	LANSING	MI	30000-0000	.		<NONE/UNKNOW	
LINCOLN BLOCK CLUB		Other Entity	123 LINCLON AVE	ELMWOOD	MI	40000	INGHAM	4326549876	<NONE/UNKNOW	
LOCAL PROPOSAL B		Local Ballot Proposal			MI		INGHAM		<NONE/UNKNOW	
MICHIGAN INDEPENDENT PAC	423645-8	Independent Committee	123 INDEPENDENCE BLVD	ELMWOOD	MI	40000	INGHAM	4327650986	<NONE/UNKNOW	
MICHIGAN LUMBER INC		Vendor	123 WOODLAND DR	ELMDALE	MI	40000	INGHAM	4327657098	<NONE/UNKNOW	
MICHIGAN PRINTING CO		Vendor	123 PRINTERS LANE	ELMDALE	MI	40000	INGHAM	4326540798	<NONE/UNKNOW	
MICHIGAN STATE HOUSE		Other Entity	100 CAPITOL AVE	LANSING	MI	48157	INGHAM	5435436534	<NONE/UNKNOW	
MICHIGAN TEMP EMPLOYMENT INC		Vendor	465 WEAVER ST, STE 14...	LANSING	MI	50000-0000	.		<NONE/UNKNOW	
MICHIGAN VENDING CO		Vendor	123 VENDOR LANE	ELMDALE	MI	40000	INGHAM	4326549876	<NONE/UNKNOW	
MID MICHIGAN BANK		Financial Institution	123 BANKERS WAY	ELMDALE	MI	40000	INGHAM	4327650983	<NONE/UNKNOW	
PROPOSAL A		Statewide Ballot Proposal			MI		.		<NONE/UNKNOW	
RIVER CLUB		Vendor	123 RIVER RD	LANSING	MI	40000-0000	.		<NONE/UNKNOW	
SMITH, JANE L.		Candidate	123 ELM STREET, APT 3...	ELMDALE	MI	40000	INGHAM	4325437654	MICHIGAN STATE	MICHIGAN STATE REP
WILSON, ANDREW		Individual	134 LINCOLN AVE	ELMWOOD	MI		INGHAM	4327652856	MICHIGAN LUMBE	FORK LIFT DRIVER
WJMI TV		Vendor	123 TELEVISION WAY	ELMDALE	MI	40000	INGHAM	4327650175	<NONE/UNKNOW	

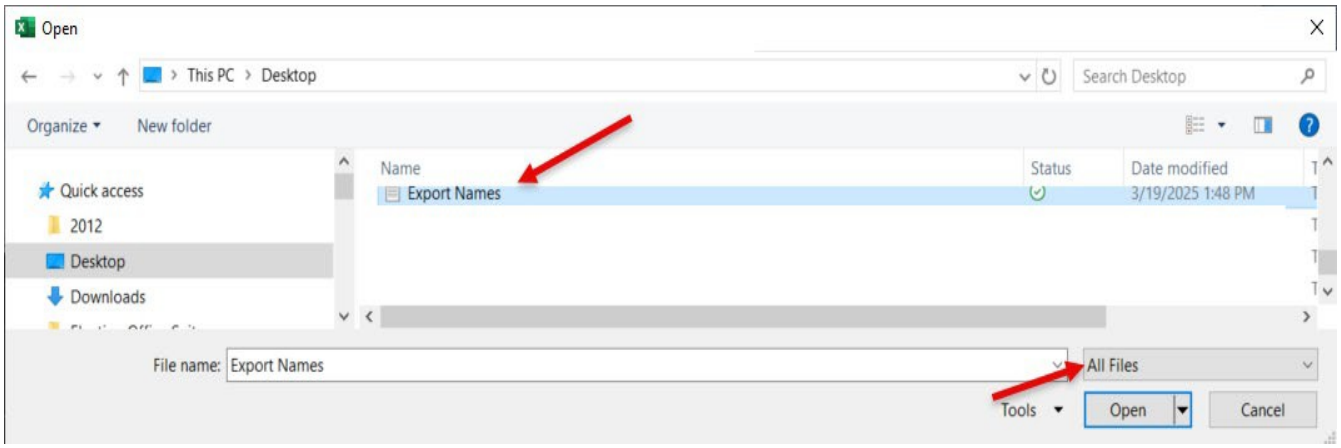
While in your MERTS file and with your Names tab active, click File on the top left corner of your file. Then click Export Names.



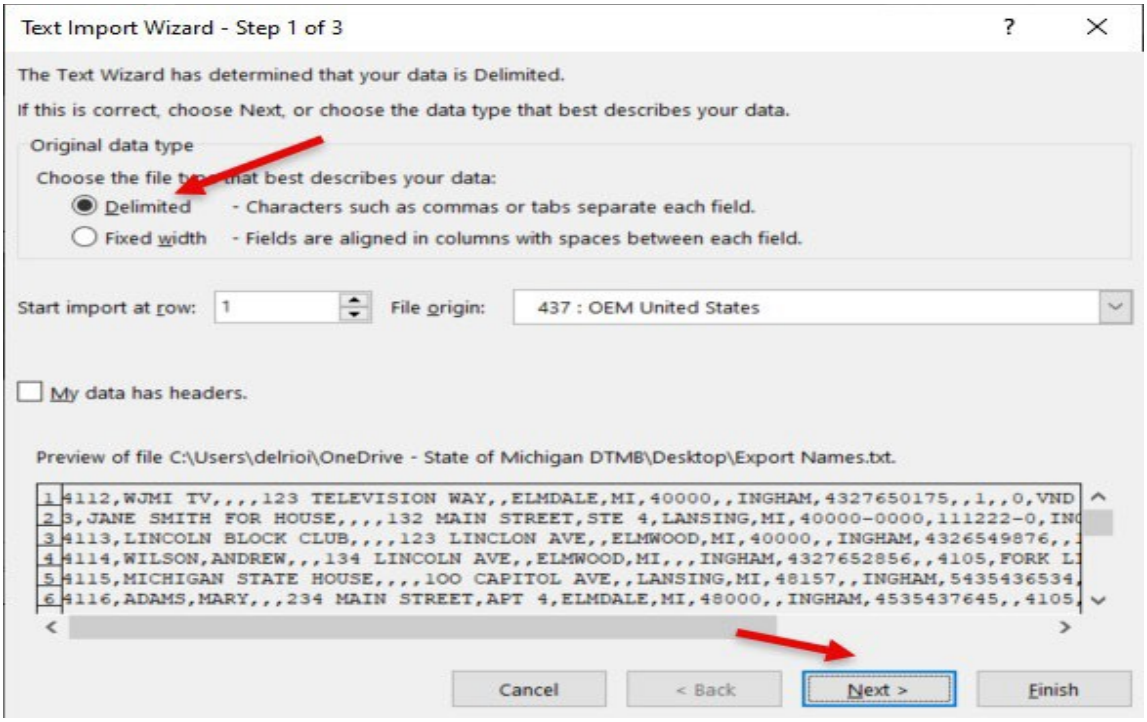
After you click Export Names you will be presented with a “Export to” dialog box. Create a file name. It can be something as simple as “Export Names” as shown in the example.
Please be sure you remember where you are saving the file. I have saved my file on my Desktop. This will make it easier when it comes time to locating your file. Click to continue.



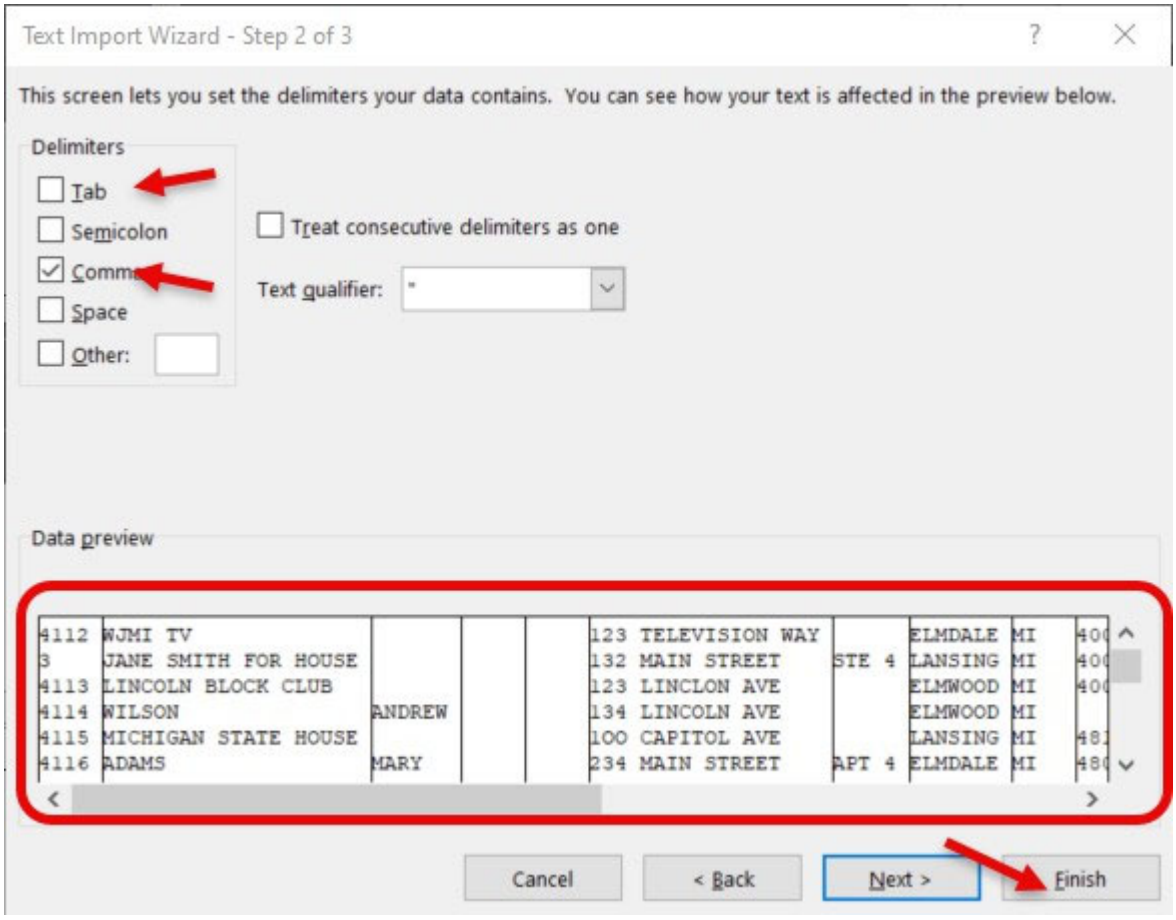
Before we can import our Names file into MiTN we want to make sure it is in the correct format. Open Microsoft Excel and locate your file. You may have to select “All Files” as the file is saved with a .txt format. Once you have located your file click Open to continue.



Before the file opens in Excel, you should receive a Text Import Wizard. You will want to leave the default as Delimited. Then hit the Next button.

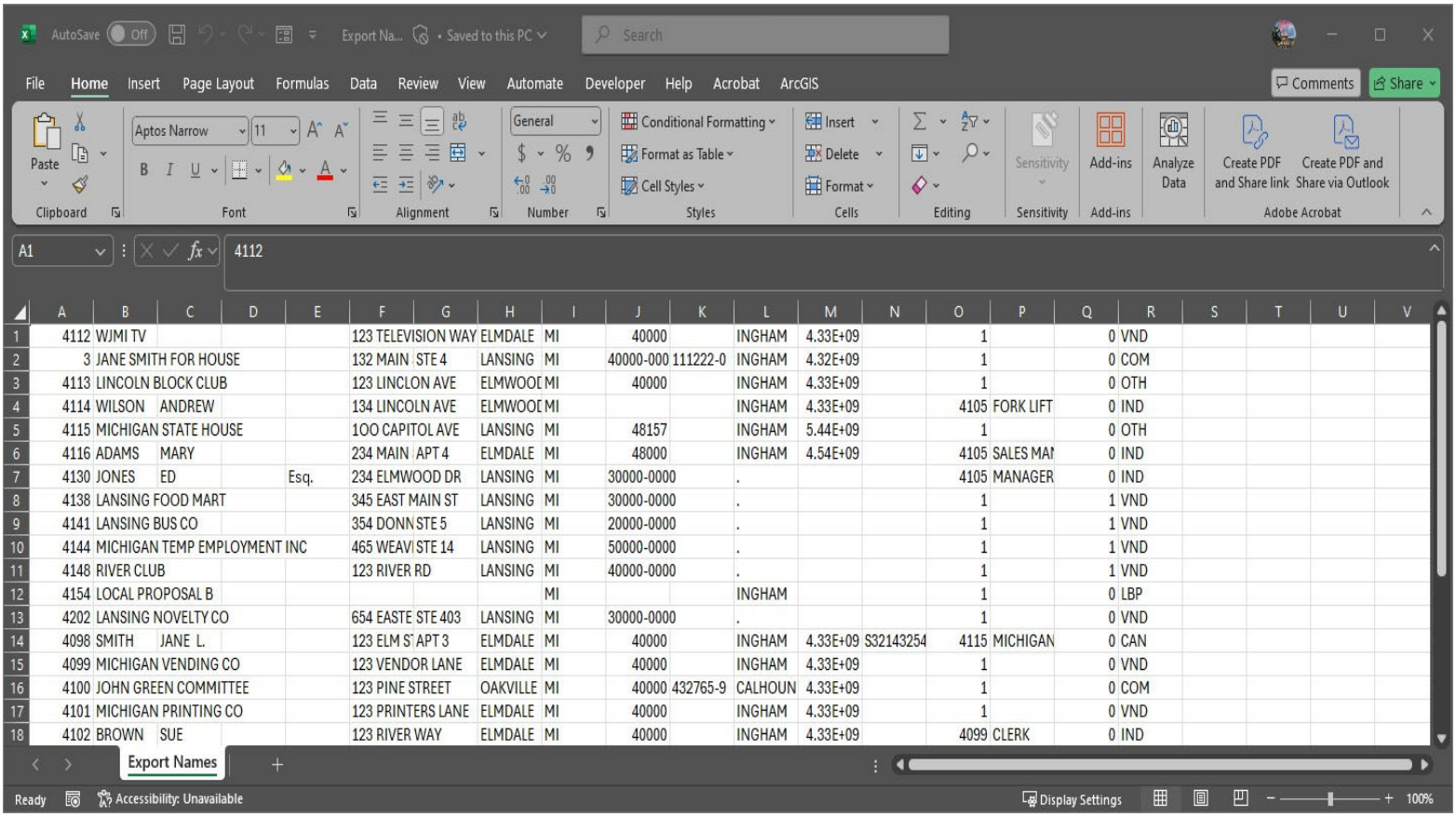


The preview box at the bottom of the screen will display your file. After you click Next you will see the Tab is checked by default. Uncheck the box and check the box titled Comma. With checking the Comma delimiter, your file will have the fields separated in their correct columns.



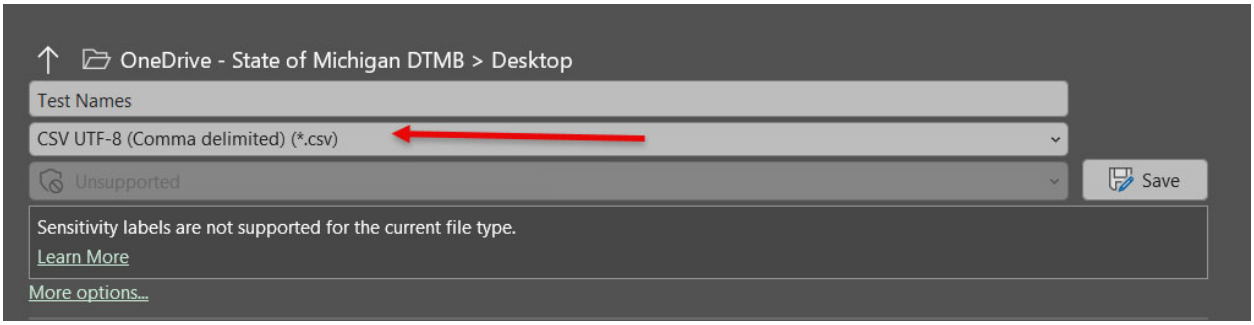
Click Finish to continue.

Great, now you should see an excel file of your contacts.
You can also use this spreadsheet to update your contact records. However, you should not change the layout as it may cause issues when importing.

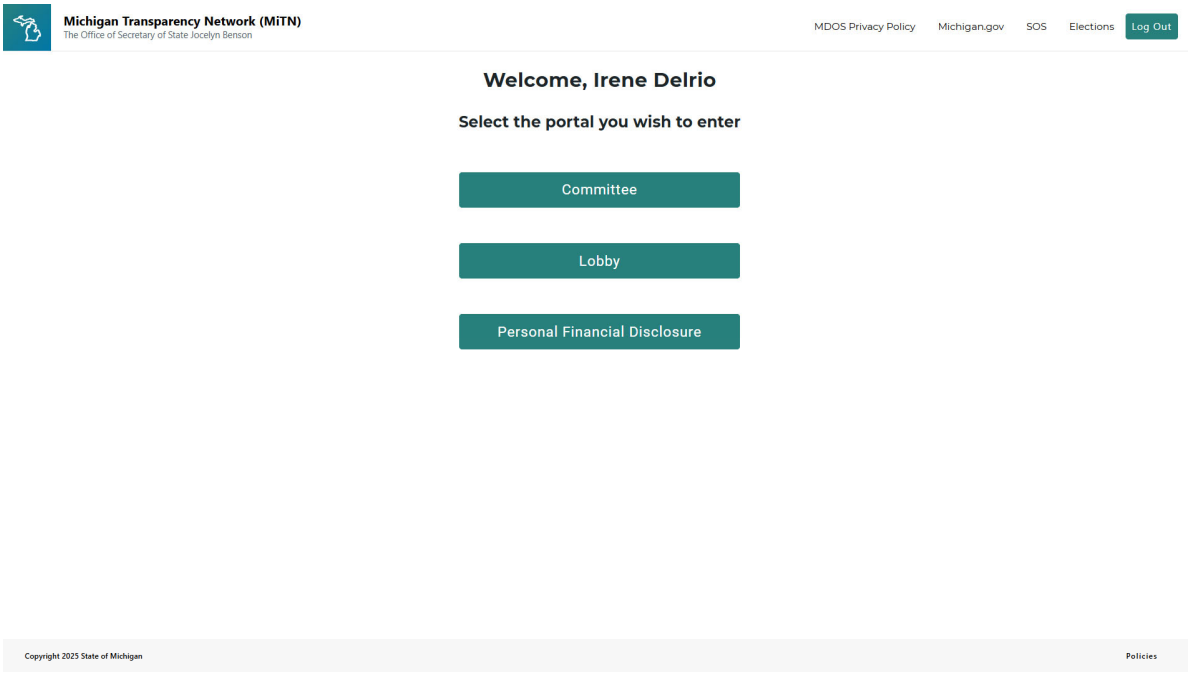


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	4112	WJMI TV				123 TELEVISION WAY		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND
2	3	JANE SMITH FOR HOUSE				132 MAIN	STE 4	LANSING	MI	40000-000	111222-0	INGHAM	4.32E+09		1		0	COM
3	4113	LINCOLN BLOCK CLUB				123 LINCLON AVE		ELMWOOI	MI	40000		INGHAM	4.33E+09		1		0	OTH
4	4114	WILSON	ANDREW			134 LINCOLN AVE		ELMWOOI	MI			INGHAM	4.33E+09		4105	FORK LIFT	0	IND
5	4115	MICHIGAN STATE HOUSE				1OO CAPITOL AVE		LANSING	MI	48157		INGHAM	5.44E+09		1		0	OTH
6	4116	ADAMS	MARY			234 MAIN	APT 4	ELMDALE	MI	48000		INGHAM	4.54E+09		4105	SALES MAI	0	IND
7	4130	JONES	ED		Esq.	234 ELMWOOD DR		LANSING	MI	30000-0000		.			4105	MANAGER	0	IND
8	4138	LANSING FOOD MART				345 EAST MAIN ST		LANSING	MI	30000-0000		.			1		1	VND
9	4141	LANSING BUS CO				354 DONN	STE 5	LANSING	MI	20000-0000		.			1		1	VND
10	4144	MICHIGAN TEMP EMPLOYMENT INC				465 WEAV	STE 14	LANSING	MI	50000-0000		.			1		1	VND
11	4148	RIVER CLUB				123 RIVER RD		LANSING	MI	40000-0000		.			1		1	VND
12	4154	LOCAL PROPOSAL B							MI			INGHAM			1		0	LBP
13	4202	LANSING NOVELTY CO				654 EASTE	STE 403	LANSING	MI	30000-0000		.			1		0	VND
14	4098	SMITH	JANE L.			123 ELM S	APT 3	ELMDALE	MI	40000		INGHAM	4.33E+09	S32143254	4115	MICHIGAN	0	CAN
15	4099	MICHIGAN VENDING CO				123 VENDOR LANE		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND
16	4100	JOHN GREEN COMMITTEE				123 PINE STREET		OAKVILLE	MI	40000	432765-9	CALHOUN	4.33E+09		1		0	COM
17	4101	MICHIGAN PRINTING CO				123 PRINTERS LANE		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND
18	4102	BROWN	SUE			123 RIVER WAY		ELMDALE	MI	40000		INGHAM	4.33E+09		4099	CLERK	0	IND

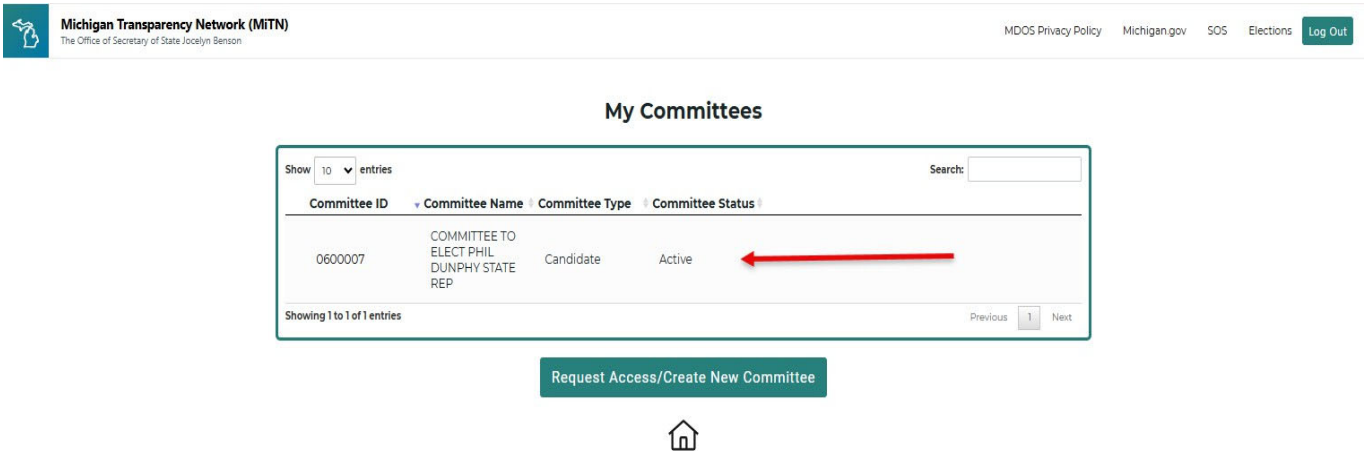
When saving your file please make sure the file is saved as a .csv (comma separated delimited) file before importing.



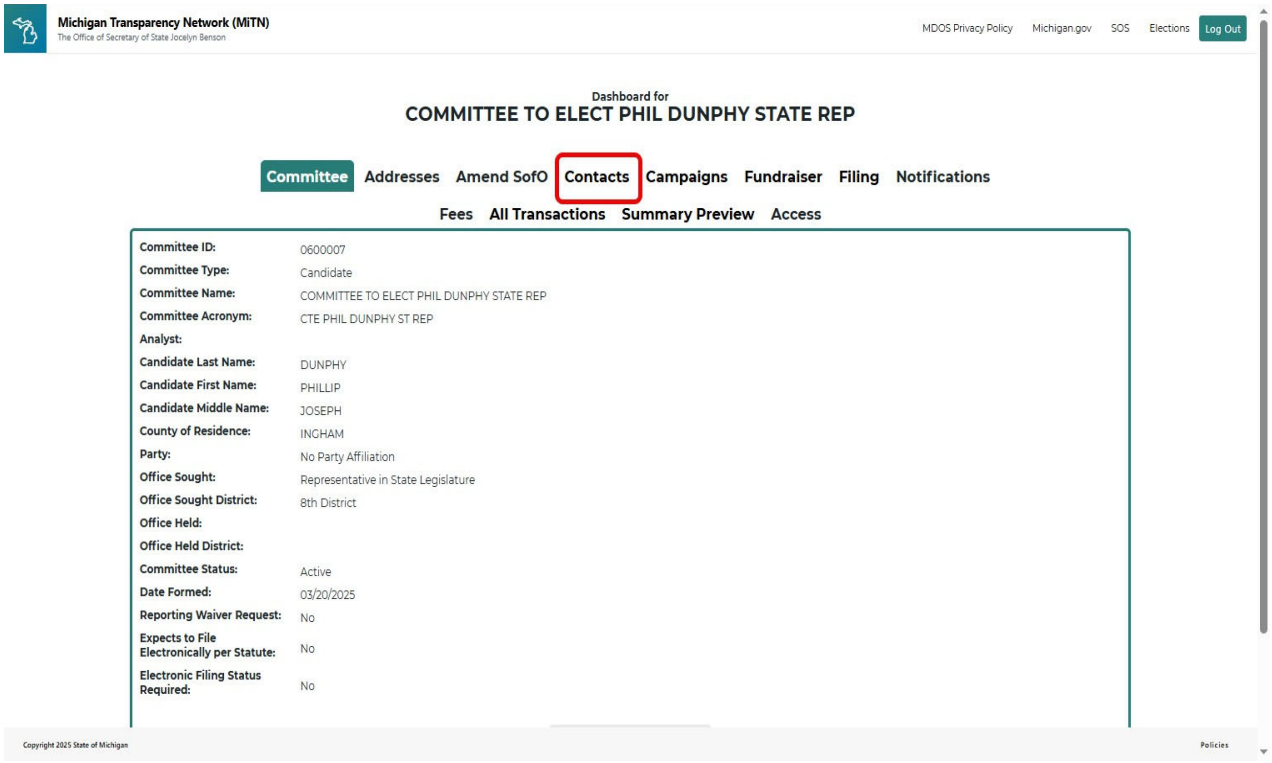
Now we are ready to import our contacts into MiTN. Log into MiTN and select Committee to see your MiTN dashboard.



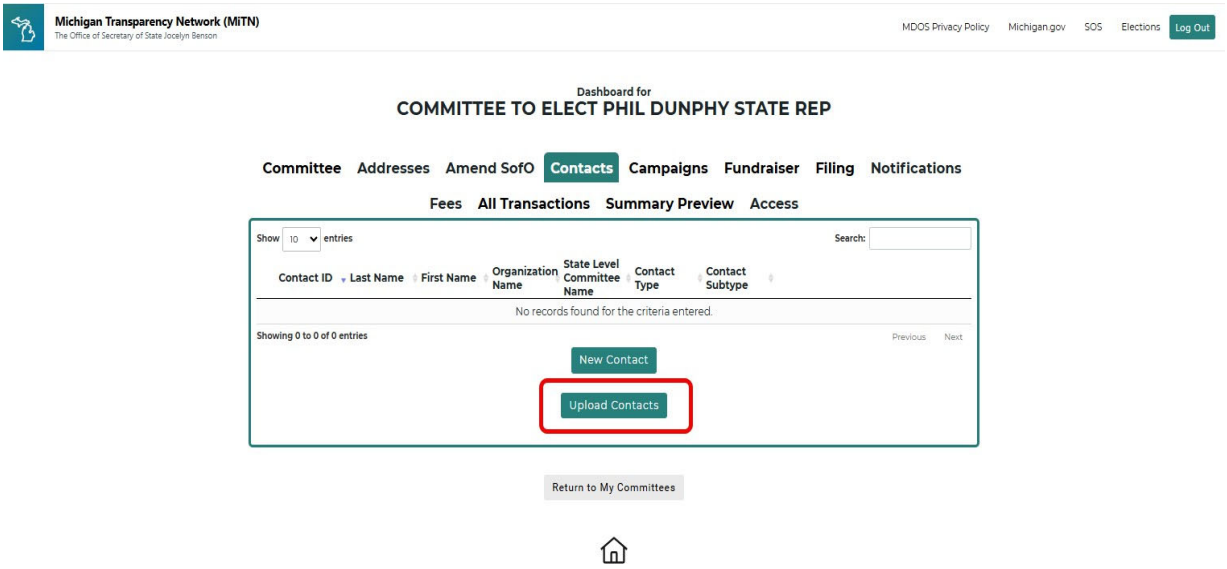
Select the committee you want to import the contact records into. Please be sure the committee is in Active status and you have access.



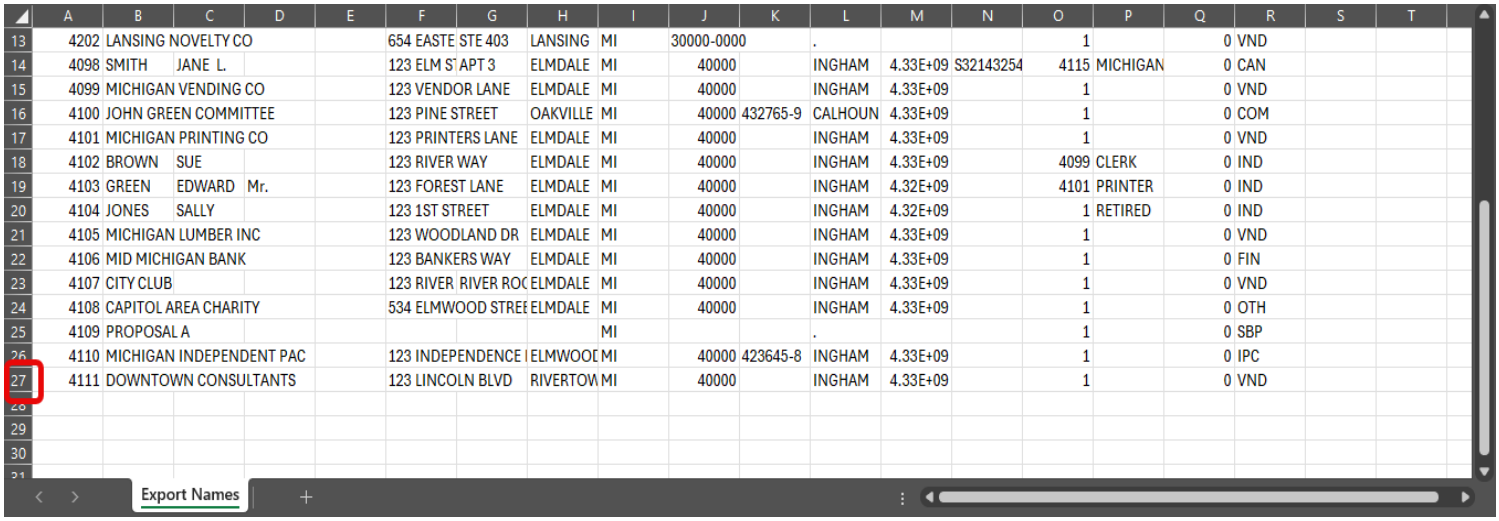
Once you have the designated committee open, click the Contacts tab. Please note if you do not see the tabs shown above this means you do not have access. Be sure to follow the steps to gain access to this committee in order to move forward.



Click Upload Contact to open the contact entry screen. There are several ways to enter contact information. You can enter them one at a time by clicking New Contact, you can create a new contact when entering a transaction and you can import. Since this training is focusing on importing we will be selecting the Upload Contacts feature.



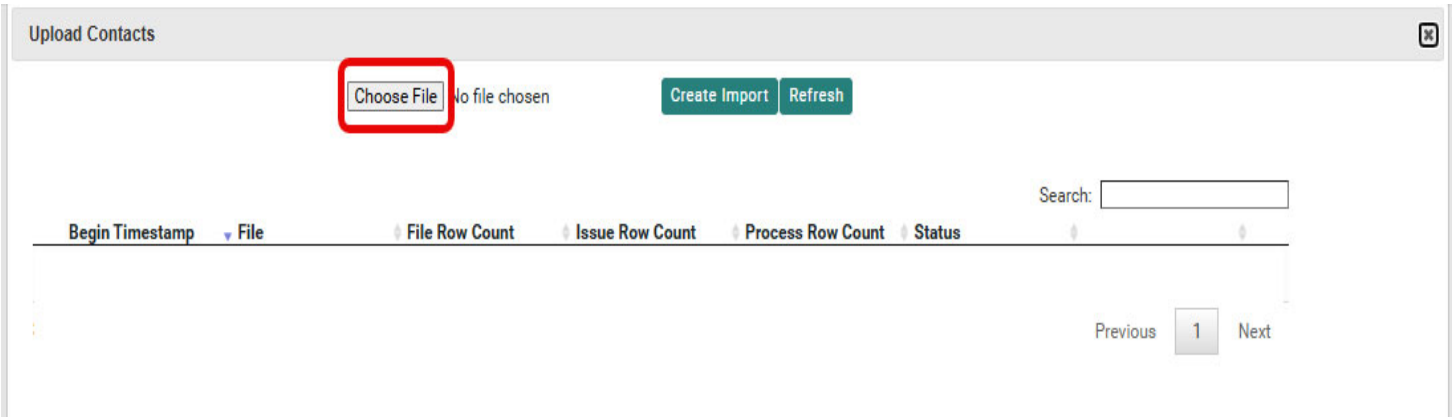
Before we attach our import file, be sure to verify the amount of records from your spreadsheet. In our example you will see we have 27 contact records to import.



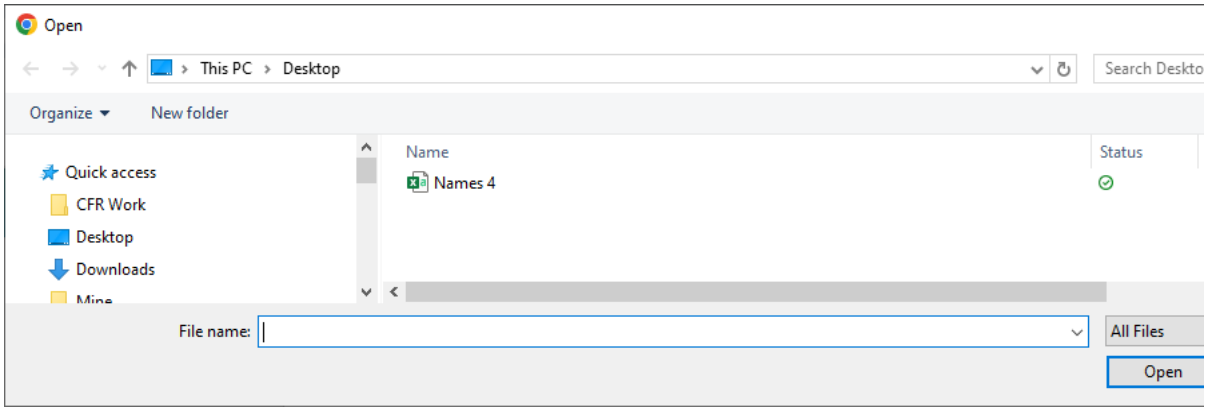
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
13	4202	LANSING NOVELTY CO				654 EASTE	STE 403	LANSING	MI	30000-0000		.			1		0	VND		
14	4098	SMITH	JANE	L.		123 ELM S	APT 3	ELMDALE	MI	40000		INGHAM	4.33E+09	S32143254	4115	MICHIGAN	0	CAN		
15	4099	MICHIGAN VENDING CO				123 VENDOR LANE		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND		
16	4100	JOHN GREEN COMMITTEE				123 PINE STREET		OAKVILLE	MI	40000	432765-9	CALHOUN	4.33E+09		1		0	COM		
17	4101	MICHIGAN PRINTING CO				123 PRINTERS LANE		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND		
18	4102	BROWN	SUE			123 RIVER WAY		ELMDALE	MI	40000		INGHAM	4.33E+09		4099	CLERK	0	IND		
19	4103	GREEN	EDWARD	Mr.		123 FOREST LANE		ELMDALE	MI	40000		INGHAM	4.32E+09		4101	PRINTER	0	IND		
20	4104	JONES	SALLY			123 1ST STREET		ELMDALE	MI	40000		INGHAM	4.32E+09		1	RETIRED	0	IND		
21	4105	MICHIGAN LUMBER INC				123 WOODLAND DR		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND		
22	4106	MID MICHIGAN BANK				123 BANKERS WAY		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	FIN		
23	4107	CITY CLUB				123 RIVER	RIVER ROC	ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	VND		
24	4108	CAPITOL AREA CHARITY				534 ELMWOOD STREE		ELMDALE	MI	40000		INGHAM	4.33E+09		1		0	OTH		
25	4109	PROPOSAL A							MI			.			1		0	SBP		
26	4110	MICHIGAN INDEPENDENT PAC				123 INDEPENDENCE		ELMWOOI	MI	40000	423645-8	INGHAM	4.33E+09		1		0	IPC		
27	4111	DOWNTOWN CONSULTANTS				123 LINCOLN BLVD		RIVERTOW	MI	40000		INGHAM	4.33E+09		1		0	VND		
28																				
29																				
30																				
31																				

Export Names

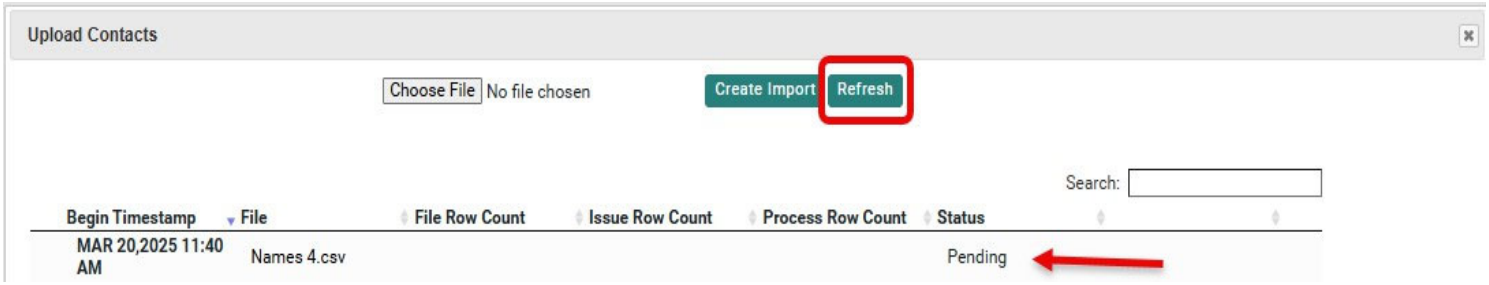
Click the Choose File button to locate your file.



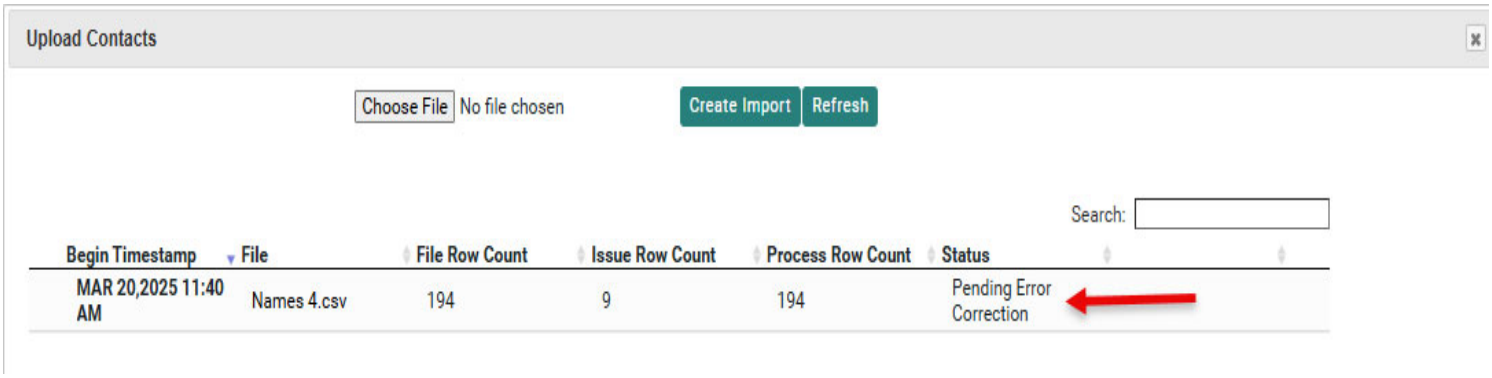
In this example I have saved my file on my Desktop. Select the file name and click Open to continue.



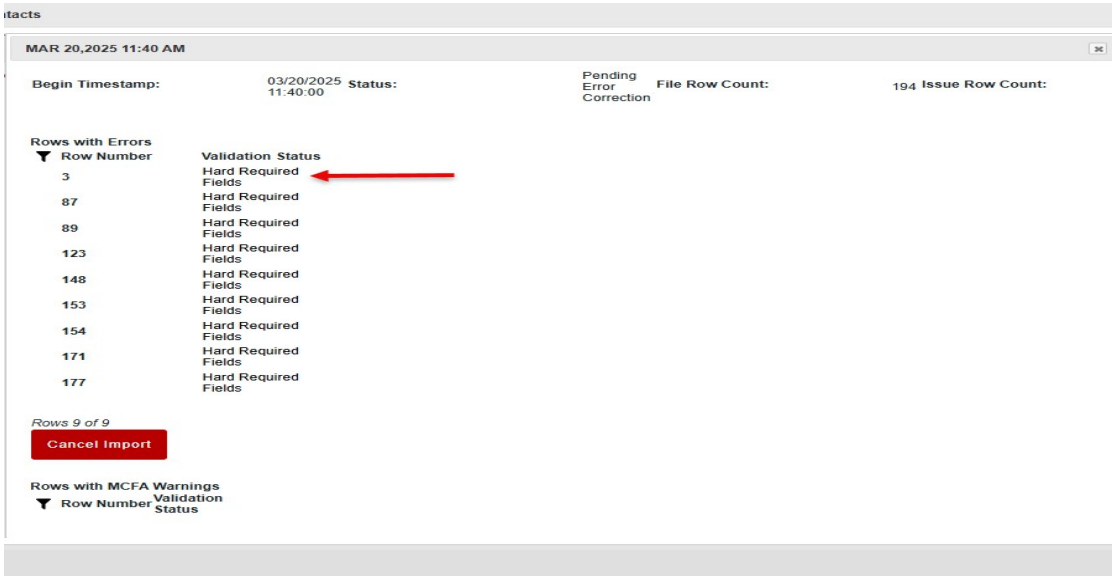
Click Create Import. You will now see your import file in Pending status. Be sure to hit the Refresh button to see the status of the import.



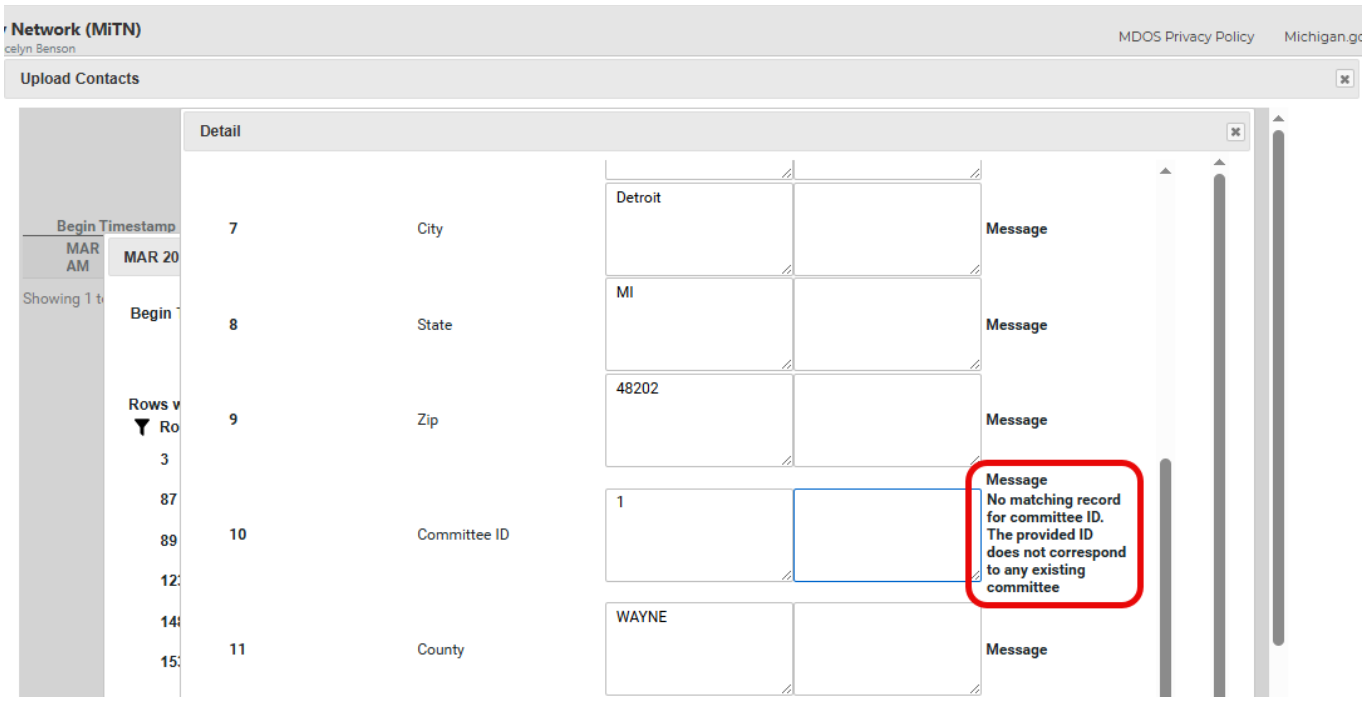
If you receive any errors during the import process you will see the message status indicate corrections may be required. Click the file you are importing.



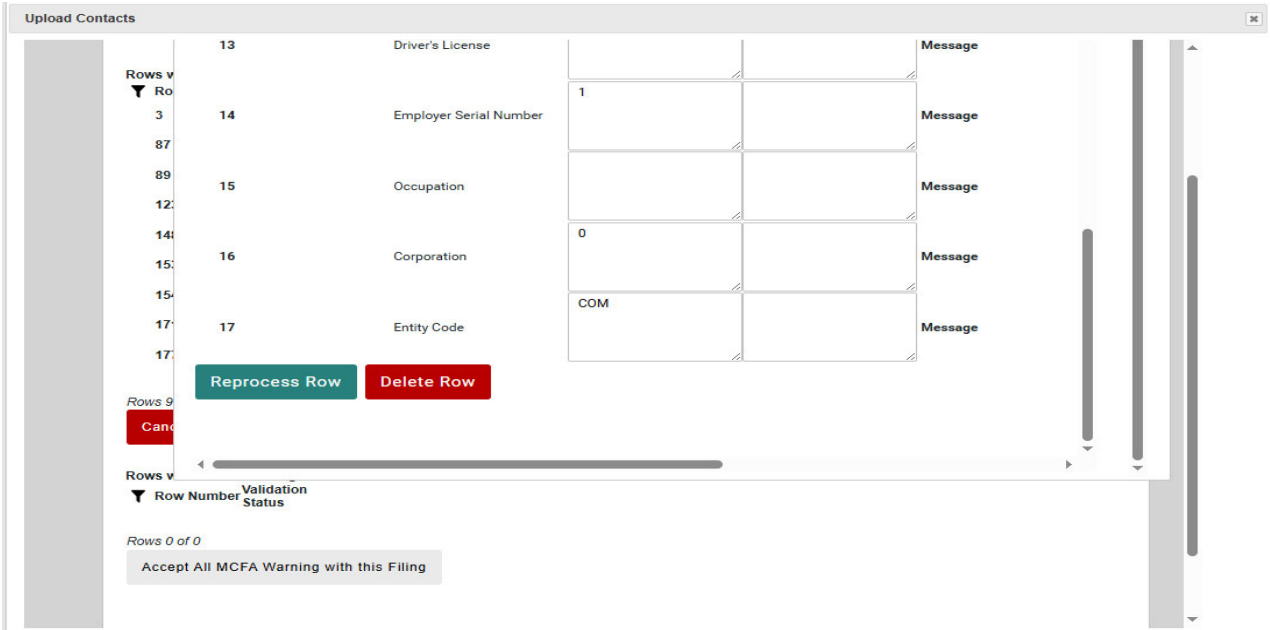
By selecting the file name you will see a list of validation errors. Click the row to open the contact record to locate the error.



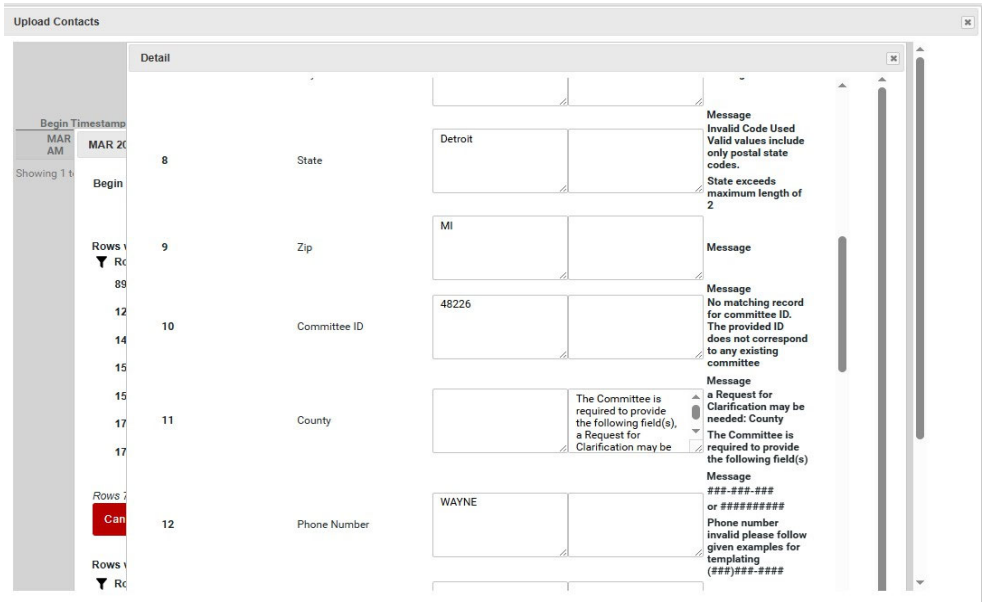
Scroll through the contact record to locate the validation error. You will see a message indicating the error and what is required. In the example above the Committee ID number for the record is not accurate and must be corrected to proceed.

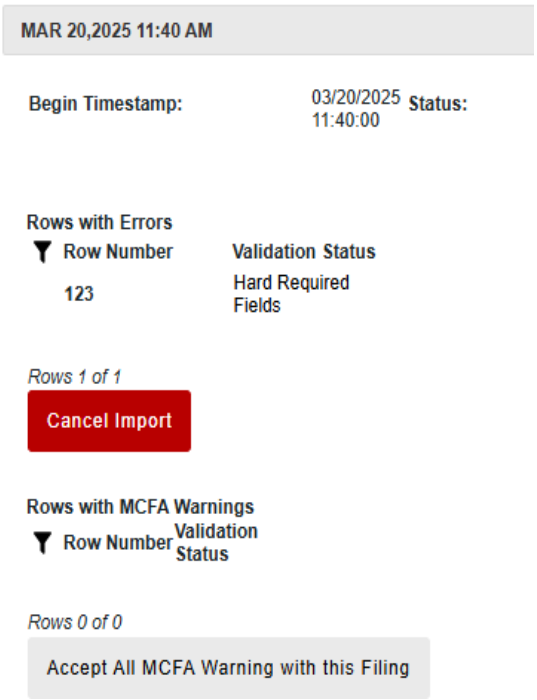


You have the option to make the correction in this screen. Then click Reprocess Row to accept your changes. If you are not sure what the correct ID number is and want to exit out, click the X on the top right corner of the screen. You can also Delete Row which will delete this contact record.



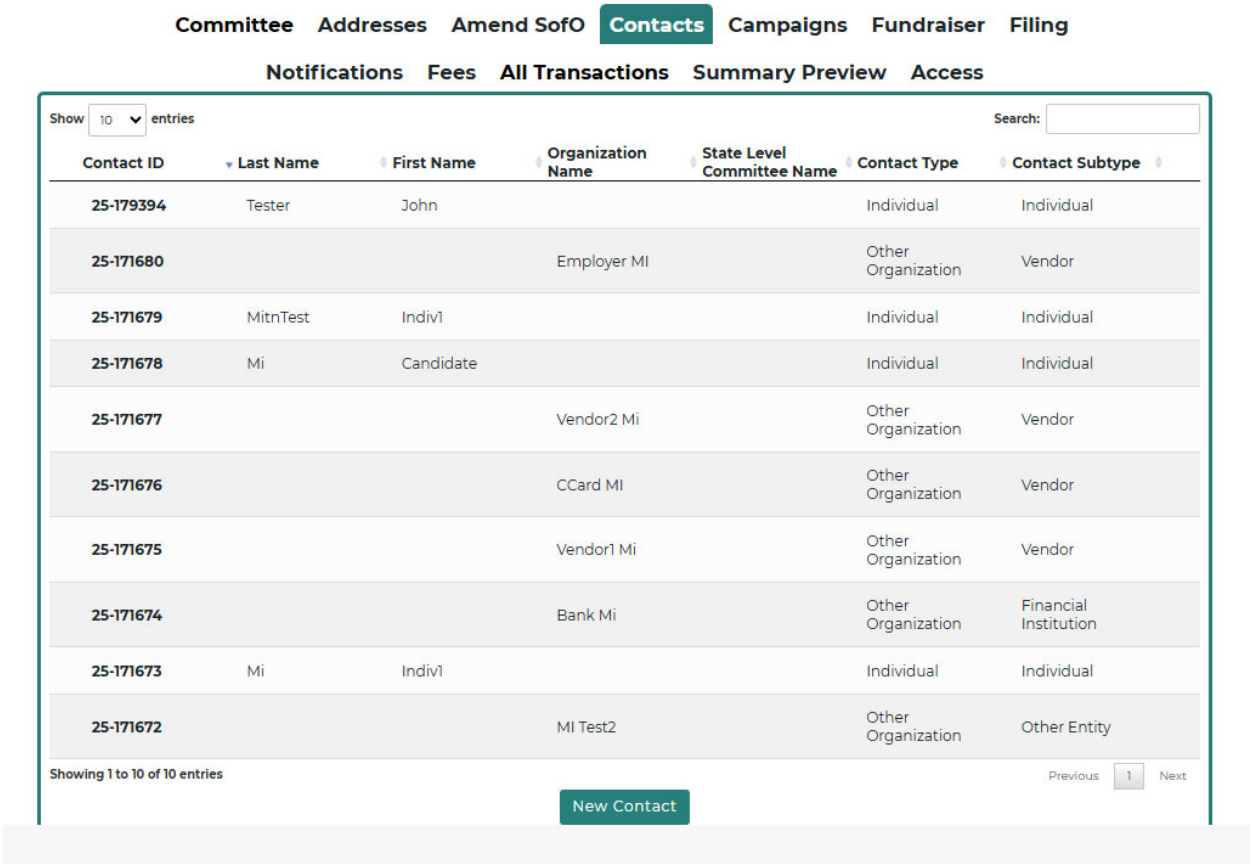
Making sure your format is correct and all columns have the correct data is extremely important. One column out of order will shift all other rows out of order and cause the file to have additional errors. In this example a missing column is causing a shift in the order making the City name appear in the State field. If you have one or two of these, they can be easily fixed in this screen. However, depending on how many of the same errors you find it might be easier to cancel this import by clicking the X on the top right corner. Then click Cancel Import to cancel the import process and go back to your excel file.





Make the necessary changes in your excel file and be sure to save the file. Exit excel and return to MiTN.

Note: All errors must be corrected or removed before any of the contacts will be imported.

Once you have corrected any errors you may have received, you can return to the Contacts tab in MiTN and start the import process again. Close out of the import window by clicking the X on the top right corner to return to the Contacts tab.

With a successful import you should now see your imported contacts and can now enter transactions.