

Spreadsheet Upload

1. Log into your admin account in your Just Between Friends Account.
2. Click on the <Run My PTA/OMDRplus> tab.
3. Click on the tab <PTA Members>.
4. Now select the spreadsheet function.
5. All that is needed at this point is to follow the steps.
6. Once you select the red words "[Import from Spreadsheet \(BETA\)](#) "
7. Firstly you will download your spreadsheet template by clicking on [Download the Spreadsheet Template](#).
8. We suggest you save your blank spreadsheet to the desktop.
9. Fill in the spreadsheet with your unit's information.

Column Name	Required?	What to put in it	Accepted values
LASTNAME	Yes	The last name of the person	
FIRSTNAME	Yes	The first name of the person	
FAMILY NAME	Yes	Some families have members with different names. This column is for the name used when referring to the family. Usually, but not always, this is the same as LASTNAME. If FAMILY NAME is blank for a given row, simply copy/paste from the LASTNAME cell in that row. Suggestion: Use the name you would use if looking up information in a phone book.	
EMAIL	*	Must be in correct format to be accepted by standard Internet email servers <i>An email address cannot be listed more than one time on the spreadsheet.</i> If more than one person in a household uses the same email address, remove the email address from the second listing. (since two households should not have the same email address) or move the members to the same household, and remove the email address from one of the members. Emails are also used to identify members who	

		already have existing Just Between Friends accounts (for another PTA unit, perhaps). Including it here will allow that member to link your PTA to his existing JBF account.	
ASSIGN A FAMILY NUMBER	Yes	Use a different positive whole number for each family – so husbands and wives get the same number. If John and Judy Smith are in the same household, Harold and Heidi Smith are in a different household, and James and Joanne Jones are in a third household, the entry for John would be 1, Judy would be 1, Harold would be 2, Heidi would be 2, James would be 3 and Joanne would be 3. There is no limit to the number of households. The number is intended to put family members in the same household. Numbers for families do not have to be consecutive and may be repeated on a new spreadsheet.	Positive whole numbers
PTA MEMBER - Y or N	Yes	If this person is a member, type Y, Yes, True or T. If not, type N, No, False, or F. Note you may add people for communication purposes.	Y, N, Yes, No, True, False, T, or F
PAID - Y or N	Yes	If this person has already paid membership dues for the year, type Y, Yes, True or T. If not, type N, No, False, or F.	Y, N, Yes, No, True, False, T, or F
STREET	*		
CITY	*		
STATE	*		
ZIP	*		
PHONE	*		

* Although these are not required fields, we suggest highly that you include them. They can be used for your communications with the households through Just Between Friends' advanced communications features. In addition, households with email addresses will be able to login to their own Just Between Friends accounts for additional benefits.

10. Note you may use copy and paste from one of your current spreadsheets into the template.
11. After you fill in your spreadsheet and save (consider saving to your desktop)
12. You will proceed to step 2 - **Test My Spreadsheet.**
 - a. Click on the “Browse” button and find your spreadsheet
 - b. Click on the “Upload” button
 - c. Here are some error that you may encounter:
 - i. **Email address duplicated in file:** The email should only appear once in the spreadsheet
 - ii. **PTA Member Status is not valid:** The field is required. Refer to the table above and see the valid entries
 - iii. **Paid Status is not valid:** The field is required. Refer to the table above and see the valid entries.
 - iv. **Phone number must be in standard US format:** No extensions or alpha codes permitted.
 - v. **Family Name doesn’t match Family Number:** Be sure to make everyone with the same family number have the same name in the Family name column.
 - vi. **Data Error:** Copy the lines or families that receive this error and put in a separate spreadsheet. You may load the rest of your spreadsheet. Click on “Contact Customer Support” from within your account.
13. Once your spreadsheet has passed the spreadsheet checker you should proceed to step 3 and upload your spreadsheet.
14. Once you click on “Spreadsheet has been tested; start import.” You will have to do the following:
 - a. Locate your file by clicking on the “Browse” button and locate your file.
 - b. Select your token and select.
 - c. IMPORTANT: once the spreadsheet is uploaded it will send emails out to all records with email address **from the admin’s(your) email** at the bottom of your window. This will allow the members to update their information. All records without an email will produce a pdf to handout to these members so they may also update their information.
15. You will receive a confirmation email with the pdf links.
16. As soon as the members are uploaded, you may manage them with your PTA roster.