Text2Bid People Upload Instructions

Cautions

Part of the upload process will DELETE ALL existing people records. Don't try it unless you are okay with that.

This feature applies to your home event – If you administer multiple events, make sure you are set to the desired home event before trying it.

Summary

Text2Bid people can be imported from a properly formatted Excel spreadsheet. The flow is as follows:

1. The user prepares a spreadsheet and selects it for uploading
2. The spreadsheet is uploaded to a temporary file on the server
3. Any previously uploaded people records are archived
4. The uploaded file is read into memory
5. ALL previously uploaded people records are deleted
6. The new people records are created

If any step of the process fails, then the process is halted at that stage.

The upload process is designed to work with the minimum possible data. It uses defaults for other data as necessary. The process operates only on specifically labeled spreadsheet columns so a user can have other fields in the spreadsheet and these will be ignored.

Restrictions

The following restrictions currently apply:

1. If you want to send an invitation or welcome text message, then you must have FirstName, LastName, and MobilePhone fields filled in.
2. If you are pre-assigning bidder numbers then the BidderID field must be filled in.
3. The upload process has been verified with .xlsx files. Other formats may not work
4. If you plan on sending out an invitation or welcome message, then all practice sessions must be completed and your event data reset prior to creating bidders from the uploaded data.

5. The column labels must begin in cell A1 (i.e. no blank rows at the top of the spreadsheet and no blank columns at the left side.)
6. No dashed, parenthesis, or periods in the mobile phone fields.

People Data Field Descriptions

The table below lists fields and describes which are required, uploadable, or not available for upload. Yellow highlight is Required, white is optional, and gray is either reserved for system use or not available.

Field Label	Rule	Type	Notes
FirstName	Optional	Text	Primary Bidder
LastName	Optional	Text	Primary Bidder
FirstName2	Optional	Text	Second Bidder
LastName2	Optional	Text	Second Bidder
Address1	Optional	Text	First Line of address
Address2	Optional	Text	Second Line of address if needed
City	Optional	Text	
State	Optional	2 Character	2 Letter abbreviation
Zipcode	Optional	5 digits	5 digit version only
MobilePhone	Optional	10 digits	Primary Bidder, no punctuation
MobilePhone2	Optional	10 digits	Second Bidder, no punctuation
Email	Optional	Text	Primary Bidder
Email2	Optional	Text	Second Bidder
Table	Optional	Text	Table number of Primary Bidder
Table2	Optional	Text	Table number of Secondary Bidder
BidderID	Optional	Integer	Bidder Number
Budget	Optional	Integer	Available Budget if event is using budgets

Other Notes

Column Order

It doesn't matter what order the columns are in. The upload will scan the spreadsheet and look for the appropriate labels.

Similarly, it doesn't matter if there are extra columns in the spreadsheet. The upload will ignore them.

Table Number Assignment

Text2Bid will assign a Table Number based on Bidder Number. If for some reason the primary and secondary bidders are seated at different tables, then Text2Bid will attempt to match the first name of the Secondary Bidder and when it finds that name, it will assign Table2 to them.