Data Manager Guide

Everbridge Suite

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System Overview

Everbridge Suite allows users to send messages to people through a variety of methods:

- Individually
- Groups (static)
- Rules (dynamic)
- Map (location of contacts)
    - Home and work (static)
    - Expected (travel)
    - Last known (badging)

Following your Organization's communications plan, everyone can be informed before, during, and after events, whether the events are emergency or non-emergency.

In Everbridge Suite, the Everbridge account is the top level of all implementations. Each account has at least one Organization, and each Organization can have multiple groups. Each Organization has its own contacts, who receive Notifications.

Overview of User Roles

User roles are assigned access to specific parts of Everbridge Suite based on what they need to do. This guide explains the tasks that you can perform in Everbridge Suite as the role listed below.

NOTE: This section describes the functionality of Everbridge's Legacy Roles. To learn how to create Custom Roles by using these Legacy Roles as a starting point, see the *Custom Roles Guide.*

Account Administrator

Account Administrators are the "super users" of Everbridge Suite. This role is typically used for the following tasks:

- **Configuration** - This can include configuration for Account or Organization Settings, as well as for the Permissions and Roles that define general system access.
- User Management - Users of the Everbridge Manager Portal need to be added to the system and given roles that reflect their responsibilities. In addition, users may potentially need to be disabled, deleted or get assistance with passwords.
- **Enabling API Access** - API access to an account and all of the Organizations included in it needs to be enabled before information can be shared.
- **Cross-Organizational Communications** - Each account has any number of individual Organizations beneath it. Functions that need to occur or information that needs to be shared across all of the Organizations, are the responsibility of the Account Administrator.

Organization Administrator

Organization Administrators are responsible for specific Organizations. They have a high level of permissions and access to a specific Organization within Everbridge Suite. They configure and define the Everbridge Suite experience for the Organization's users and contacts.

Organization Administrators can access the **Dashboard**, **Universe**, **Notifications**, **Incidents**, **Contacts**, **Reports,** and **Settings** tabs. From these tabs they can:

- Configure Organization settings.
- Add and manage users.
- View dashboard panels.

- Select contacts for a Notification or Incident by Individuals, Groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates.
- Create, manage, send, and delete Incidents, Incident Templates, and Scenarios.
- Add and maintain Contacts and Groups.
- View, create, edit, and delete Reports.

IMPORTANT: For information about performing tasks as an Organization Administrator, see the *Organization Administrator Guide*.

Incident Administrator

An **Incident Administrator** manages Incident communication for Organizations. They can access the **Incidents**, **Dashboard**, **Contacts**, and **Reports** tabs. From these tabs they can:

- Create, manage, send, and delete Incidents, Incident Templates, and Scenarios.
- View dashboard panels.
- Add and maintain Contacts, Groups, and Rules.
- View, create, edit, and delete reports, excluding Notification Reports.

Group Manager

A **Group Manager** manages groups of contacts with an Organization. They can also send Notifications to predefined sets of contacts within assigned groups. Group Managers can access the **Dashboard**, **Universe**, **Notifications**, **Contacts**, and **Reports** tabs. From these tabs they can:

- View dashboard panels.
- Select contacts for a Notification by Individuals, groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates.
- Add and maintain Contacts, Groups, and Rules. They cannot, however, upload files with contact information.
- View, create, edit, and delete some reports.

Dispatcher

A **Dispatcher** can send Notifications. They can also create and manage Notification templates and manage scheduled Notifications and active Notifications. Dispatchers can access the **Dashboard**, **Universe**, and **Notifications** tabs. From these tabs they can:

- View dashboard panels.
- Select contacts for a Notification by Individuals, Groups, and Rules, as well as in a geographic area from the **Universe** map.
- Create, manage, send, and delete Notifications, Notification Templates, and Message Templates to specified contacts.

Data Manager

A **Data Manager** manages contact records. Data Managers can access the **Settings**, **Contacts,** and **Reports** tabs. From these tabs they can:

- Add and maintain Contacts, Groups, and Rules.
- Configure Contact and Group settings.
- View, create, edit, and delete reports.

Mass Notification Operator

A **Mass Notification Operator** sends predefined Notification templates and can manage active Notifications. Mass Notification Operators can access the **Notifications** tab.

Incident Operator

An **Incident Operator** launches and manages Incidents. Incident operators can access the **Incidents** tab.

Registering Your Access to the Manager Portal

To be a user in Everbridge, you need to register a profile. When invited, you receive an email like this:

Everbridge User Registration Invitation

Dear Sarah,

An Everbridge user account has been created for you by an administrator for Customer Learning Universe. In order to gain access, you are invited to register your account. This invitation will expire in 72 hours.

To register your account, just click on the link below or paste it into your browser.

https://manager-qa1.everbridge.net/registers?auth=TyWn4BO2DnU%3D&code=M%2Bq04f9KvcHY8AeofnMRB5uWJpTPsDmgfSQnLAN746Q%3D

Should you have any questions or if you received this invitation in error, please contact an administrator.

Regards,
Customer Learning Universe

Before the invitation expires, click the link to get to the registration page and create your profile.

1. **Username**: Give yourself a username. You will use this username to log in to the Everbridge Manager Portal. Usernames are case-insensitive and must be a minimum of four acceptable characters and a maximum of 80 characters. Acceptable characters are:
   - Uppercase letters (A-Z)
   - Lowercase letter (a-z)
   - Numerals (0-9)
   - Period (.)
   - Dash (-)
   - Underscore (_)
   - At symbol (@)
2. **Password**: Select your password. It must be at least eight characters. It must contain at least one item from three of the following four groups:
   - Uppercase letters (A-Z)
   - Lowercase letter (a-z)
   - Numerals (0-9)
   - Special characters: ! @ # $ % ^ & * ( )
3. **Confirm Password:** Re-enter your password to confirm what you entered.
4. **Secret Question**: Select a security question from the Question drop-down list that only you will know. If the system needs to confirm your identity, it asks this question.

5. **Answer**: In this field, type the answer to the question. Optionally, select the checkbox: **Show answer**.
6. **Time Zone**: From this drop-down list, select your time zone.
7. Click **Continue**.
8. Go to the Everbridge login page: **http://manager.everbridge.net** or **http://manager.everbridge.eu**.
9. Enter the **Username** and **Password** you just created.
10. Click **SIGN IN.** After you are signed in, you can manage your user profile. See Managing Your User Profile.

NOTE: If you become locked out of your account after three or five failed login attempts, either contact your Administrator or choose to unlock the account yourself.

Managing Your User Profile

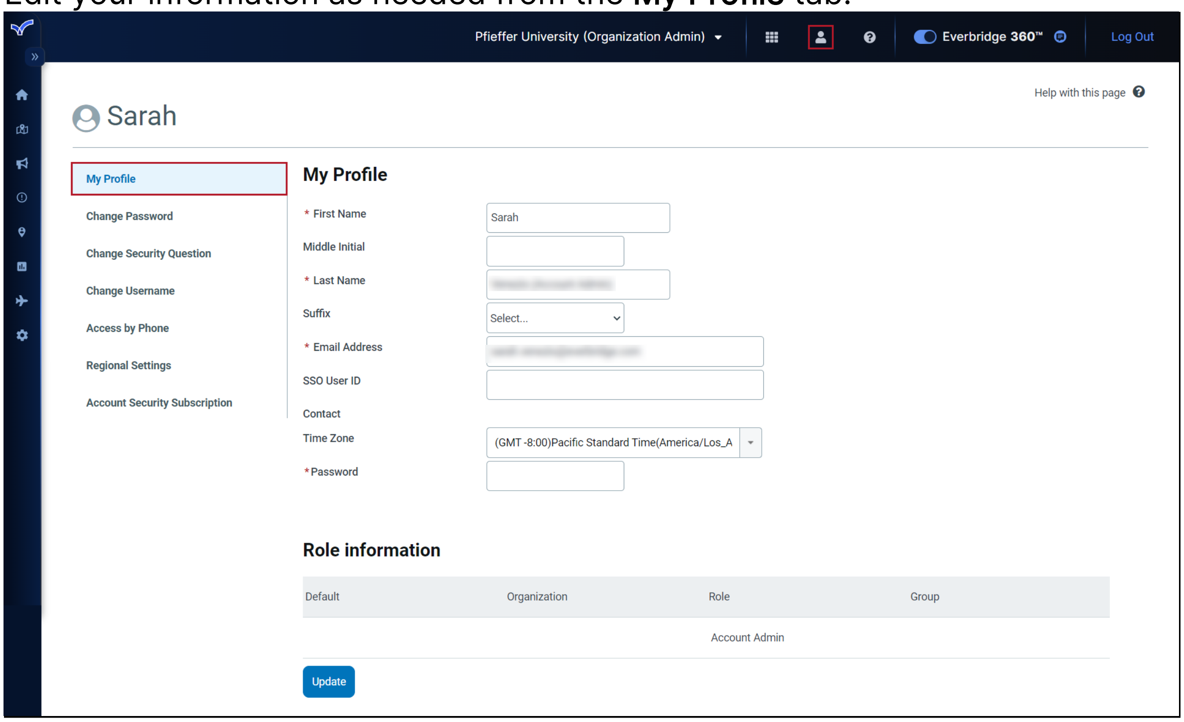
After successfully logging in, you will see an Everbridge Suite page. You have access rights to the navigation tabs depending on your permissions and your Organization's purchased products. See Apps Menu for more details.

Make Changes to Your User Profile

Once you have logged in to Everbridge Suite, you can make changes to your user profile, your password, your security question, your ability to launch Notifications by phone, and/or your regional settings.

To change your profile:

1. Click the **Person** icon, located at the top of the page, then **My Account**. .
2. Edit your information as needed from the **My Profile** tab.



3. In the **Password** field, enter your login password. Users logging in via Single Sign-On will not be required to enter a password.
4. Click **Update**.

> **NOTE:** When setting your Time Zone, know that the application automatically changes to Daylight Savings Time (DST) and automatically resets in Spring, as needed.

Change Your Password

To change your password:

1. Click **Change Password** from the left-hand panel. The **Change Password** panel is displayed.
2. Enter the password information in the fields and click **Save**.

Federal Clients	Non-Federal Clients
At least 12 characters.	At least 8 characters.
At least one item from each of the following four groups: • Uppercase letters (A through Z) • Lowercase letters (a through z) • Numerals (0 through 9) • Special characters: ! @ # $ % ^ & * ( ) Cannot contain your account, first or last name	• At least one item from three of the following four groups: • Uppercase letters (A through Z) • Lowercase letters (a through z) • Numerals (0 through 9) • Special characters: ! @ # $ % ^ & * ( ) Cannot contain your account, first or last name.
Password lock after 3 attempts.	Password lock after 5 attempts.
Password Expiration default: ON Prompt users to create a new password every: • 30 Days. • 60 Days. • 180 Days.	Password Expiration default: ON Prompt users to create a new password every: • 90 Days. • 180 Days. • 365 Days.
When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 24 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.	When you reset or change your password, you will need to provide a new password. The new password cannot be the same as the previous 3 passwords. If you change your password, the counter resets to zero (0) and starts a new cycle.
When you forget your password, you are sent a temporary password that is valid for the next 24 hours.	When you forget your password, you are sent a temporary password that is valid for the next 72 hours.

Change Your Security Question

To change your security question:

1. Click **Change Security Question** from the left-hand panel. The **Change Security Question** panel is displayed.
2. Select a new question from the drop-down list.
3. Type the answer to the question. Your answer is hidden. Optionally, select the check box: **Show answer**.
4. Type your password and click **Save**.

Access a Notification by Phone

To be able to access a Notification by phone:

1. Select **Access by Phone** from the left-hand panel.
2. Enter your **User ID** and **Password** in the respective fields.
    - The **User ID** and **Password** must be numeric, but the fields cannot be identical. For example, if the **User ID** is "991100", then the value in the Password field cannot also be "991100".
    - The fields can only contain digits 0-9, but cannot start with zero (0).
        - The values cannot contain all the same digits (such as all "1", as in 111111).
        - The values cannot be any of the following nor the reverse of any of them: 123456, 1234567, 12345678, 123456789, 124567890.
    - Minimum length: 6 digits
    - Maximum length: 20 digits
    - The values cannot be empty.
    - The values cannot contain spaces (no leading spaces, no spaces between digits, and no trailing spaces).
    - The values cannot contain any non-alphabetic special characters or alphabetic characters.
3. Click **Save**.

Change User Regional Settings

To change the User Regional Settings from US English:

1. Select **Regional Settings** from the left-hand panel.
2. From the **Language** field, select your desired language from the drop-down list. Depending on the language you choose, the date format for the country automatically adjusts accordingly.
3. From the **CSV Delimiter** field, select either:
    - Comma (,)
    - Semicolon (;)

    The semicolon delimiter does not support the following:

- Incident Quick Reports
- Point Address Data

> **NOTE:** Regional Settings can be configured at either the Account level or the Organization level.

4. Click **Save**.

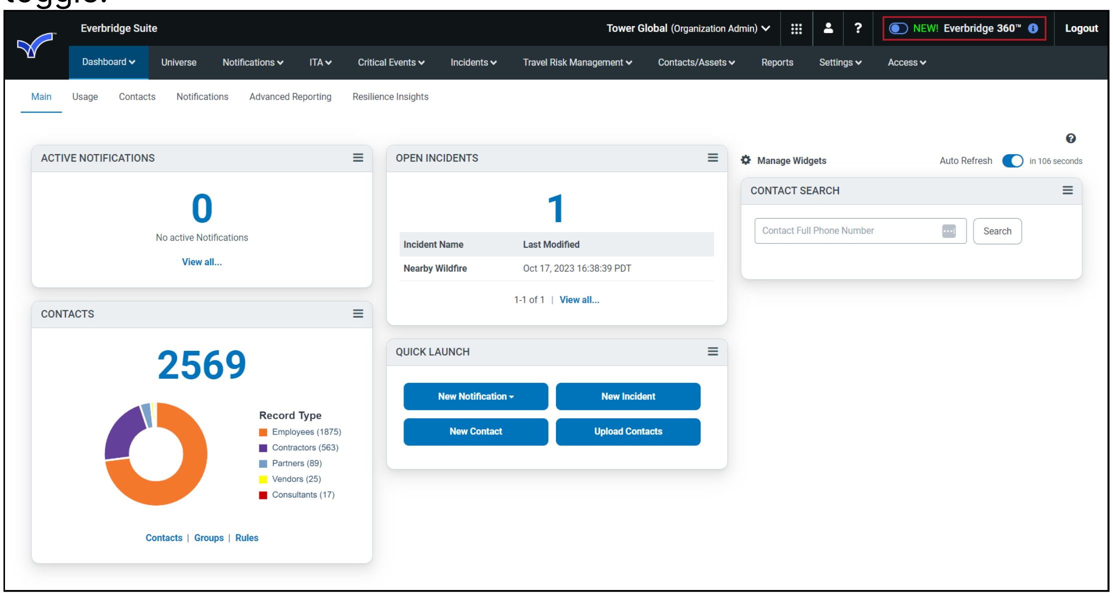
Apps Menu

The **Apps Menu** can be found on the left side of the Manager Portal. If your role has access to other Everbridge applications that your Account or Organization has purchased, they'll appear here.

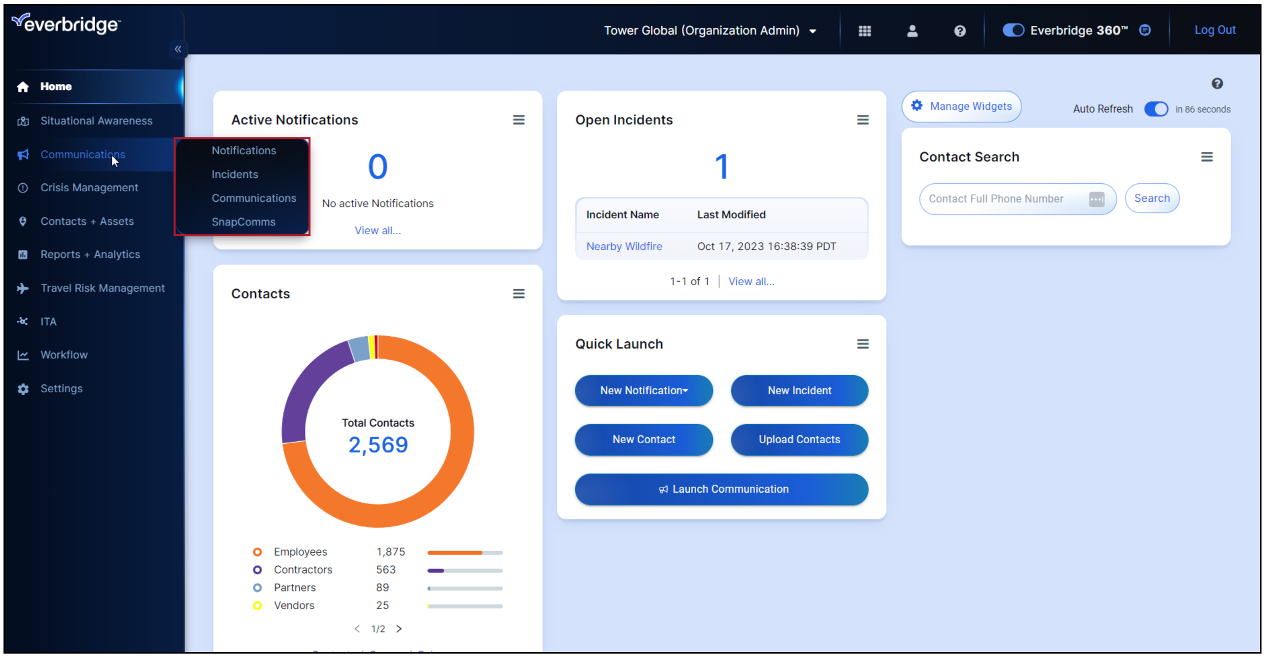
There are two different App Menus:

- Account Level (only accessible to Account Administrators)
- Organization Level

NOTE: This page describes navigating the Manager Portal with the **Everbridge 360** interface applied instead of the Legacy UI. The Everbridge 360 interface can be enabled or disabled at any time by clicking on the toggle.



Select any enabled application or module from the menu bar to access it. Hovering your mouse over certain apps in the menu bar will populate an additional menu for easier navigation to subsections within that app or module.



Account-level Menu

Account Administrators have access to the **Account-Level menu**, which includes the following modules:

Tab	Description
Communications	Notifications and templates can be reviewed, configured, and sent from here.
Contacts and Groups (or Contacts/ Assets)	View or upload Contacts and Assets.
Users	View and manage users at the Account level.
Reports and Analytics	The **Reports and Analytics** tab allows you to view Quick Reports (for example, Notification Analysis and Event Analysis)
Roles	The Roles tab allows the Account Administrator to add other Everbridge roles and permissions to users in each Organization.
Settings	View and manage Account-level settings.

Organization-level Menu

Review the following information about each navigation tab that's accessible from the Organization level:

Tab	Description
Home	The default Organization-level landing page after signing in, which displays a customizable dashboard with panels of information about the activities in your Everbridge Suite Organization.
Situational Awareness	Allows you to navigate to either **Universe** or **Visual Command Center** to monitor events on data-rich, interactive maps.
Communications	Includes access to the **Notifications**, **Incidents**, **Communications**, or **SnapComms** modules.
Crisis Management	The **Crisis Management** tab contains information and configuration options for the Organization's Critical Events. See the *Crisis Management User Guide* for more information.
Incidents	The **Incidents** tab is for Incident Communications. Depending on your role, see the *Incident Administrator User Guide* or *Incident Operator User Guide*.
Contacts and Groups (or Contacts/Assets)	Add and maintain recipients who will receive Notifications, such as residents, employees, and college staff. Administrators can upload Contacts and add Groups and Rules. Administrators, Data Managers, and Group Managers, if given permission, can manage calendars from the Scheduling subtab.
Reports and Analytics	The **Reports and Analytics** tab allows you to view Quick Reports (for example, Notification Analysis and Event Analysis)
Travel Risk Management	View and manage travel-related information, such as Travel Risk Intelligence or Booking Alerts. See the *Travel Protector User Guide* for more information.
ITA	Offers information and configuration options for IT Alerting. See the *IT Alerting User Guide* for more details.
Workflow	Allows users to view and configure CEM Orchestration workflows.
Settings	The **Settings** tab is provided for Administrators to configure settings specific to your Organization.

Access	The **Access** tab is displayed only if Organization Administrators have been permitted to manage users and roles.

NOTE: Some of the above options (such as Travel Risk Management and Crisis Management) will only appear if they've been purchased by the Organization.

Contacts and Groups

Use the settings in the Contact and Groups section to create record types, additional information questions, and subscription fields. You can also configure Secure FTP settings.

Contact Record Types

Contact Record Types allow you to assign your Contact Records to major categories. This allows you to manage Contact Records separately if the records are sourced from different systems. For example, store employee and contractor records on different systems.

After defining a Record Type, use them to:

- Search and manage Contact Records.
- Filter the target audience of any Notification.
- Filter search results and reporting results.

> **NOTE:** Since the Record Type field is required in the Contact Record, define the Contact Record Types before adding any Contacts to the Organization.

Record Types

The system has one Record Type configured that cannot be deleted. The default value for this Record Type is **Employee**. If Employee is not a Record Type that your Organization needs, you can change the name.

Some example Record Types include:

- Employee
- Contractor
- Vendor
- Visitor
- Partner
- Internal Personnel
- Citizen
- Doctor or Physician
- Nurse
- General Staff
- Faculty
- Professor or Teacher
- Student
- Parent

Add Record Type names that reflect how you want to classify your contacts. For example:

- Government—Employee and Citizen
- Education—General Staff, Faculty, Student, Parent, Alumni
- Health Care—General Staff, Physician, Nurse

Add a Record Type

To add a Contact Record Type:

1. Type a name in the field.
2. Click **Add**.

Edit a Record Type

To edit the name of a Record Type:

1. Click the Pencil icon for the Record Type that you want to edit.
2. Edit the Record Type's name.
3. Click the **Save** icon, or click the **Cancel** icon to leave the Record Type unchanged.

Delete a Record Type

To delete a Record Type:

1. Click the **Trash Bin** in the Content Type row.
2. Confirm that the Record Type no longer appears.

Additional Information

You can define custom data fields for filtering Contact Records for a Notification. Examples could be:

- The location where an employee works.
- The title or department of an employee.
- A particular skill or certification.

Each field can use any of the following formats:

- **Text box** — allows any value. Use this format when the consistency of the value is not important for users. For example, a field called "Commute Method" could accept the values "bus" and "city bus."
- **Single selection drop-down list** — contains a list of allowed values. Use this format to ensure the Contact Record value is part of a list of allowed values.
- **Multiple selection drop-down list** — contains a list of allowed values. Use this format to ensure the Contact Record value is part of a list of allowed values.

Each field can accept the following data types:

- **Text** — accepts any string.
- **Number** — must contain digits 0-9.
- **Date** — uses the date format according to the language selected in the user profile.

There are no limits to the number of fields you can define.

> **NOTE:** Everbridge Suite does not add an empty field to a Contact Record if you do not define a value for the custom field in that Contact Record. For example, assume you have a custom field named "Work Location". If you do not populate a value for "Work Location" for Joe Smith, then Everbridge Suite does not add "Work Location" to Joe Smith's Contact Record.

Add fields

To add an **Additional Information** field:

1. Click **Add** at the top of the interface. The **Add Fields** pane appears. The bottom pane shows the existing Additional Information fields.
2. Fill out the fields:
    - **Name** — The desired name for the custom field as users will see it in the Contact Record under **Contacts** or in the Member Portal.
    - **Data Type** — The data type for the custom field.
    - **Display Format** — The display format for the custom field.

- **Optional** — if the **Display Format** is a list, use the boxes provided to enter all allowed values. Click **Up** and **Down** to customize where the value appears in the list.

3. Click **Add another item** to add additional fields.
4. Click **Save.**

Edit a field

To edit a field:

1. Click the pencil in the field's row.
2. Make any changes to the field.
3. Click **Update** to save your changes or **Cancel** to undo your changes.

NOTE: You cannot change the **Data Type** or **Display format**.

Delete a field

To delete a field:

1. Click the **Trash Bin** in the field's row.
2. Confirm the deletion.

NOTE: If contacts have an assigned value for this field, then the application will remove those values from their Contact Records.

Reorder the fields

To reorder the **Additional Information** fields:

1. Toggle on **Enable customized sequence** to reorder the existing **Additional Information** fields. The **Additional Information** fields are numbered sequentially.
2. Drag and drop a field to reorder it.
3. Select **Sequence.**
4. Drag the field to its new order.

When adding a contact, the **Additional Information** fields are displayed in the chosen order.

Alert Subscriptions

You can add types of Notifications to which the contact can subscribe. For example, you could offer to notify contacts about several types of traffic conditions in your area.

To add a new custom Alert Subscription value:

1. Click **Add**. The **Custom** radio button is selected by default.
2. From the **Type** field, select the type of field to add from the drop-down list:
    - **Custom** — Can have any values you choose. Type your values, as needed. Select **Add another item to add additional values**. Optionally, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
    - **Weather** — Offers a list of predefined values for different weather conditions. To add Weather subscriptions, see *Setting Up Your Organization for Automated Weather Alerting* in the *SMART Weather Alerting User Guide*.
3. Type a name for the **Alert Subscription** field. This name is shown on the Member Portal page when the contacts are making their selections.
4. Enter a value.
    - To enter more than one value, click the link: **Add another item**, and continue to enter values as needed.
    - To sort your values, click either **Sort: Alpha A-Z** or **Alpha Z-A.**
5. Click **Save**.
6. Optionally, reorder the categories by dragging the row to its location.

To edit a field, click its name in the list. Click in a text box to edit the name or values. Click **Save**.

To remove an Alert Subscription, click the **Trash Bin** from its row in the list. If you click the Trash Bin of a Category, all subscriptions are also removed. Or, click only the Trash Bin of the subscription to be removed.

Incident Subscriptions

Incident Subscriptions allow recipients (contacts) to proactively subscribe to Notifications related to issues and/or areas of interest to them. Incident Subscriptions are tied to the Incident Communications module and utilize Incident Variables as part of the selection criteria. A particular subscription with different preferences is a "combination."

In a single subscription, you can create multiple combinations of Incident variables and subscribe individual contacts and/or groups to a specific combination. When an Incident is created, individuals who have opted-in to the specific combination criteria will receive a Notification.

You can optionally expose the Incident subscriptions to their Member Portal for self-service purposes.

Settings

About Subscriptions

You can create, view, and delete the Incident subscriptions from the Manager Portal.

To create a subscription:

1. Select **New Subscription** above the Subscription table.
2. Specify a name for your subscription.
3. Click **Save**.

After the subscription has been created, you can create a combination by specifying a mix of variables for the subscription.

About Combinations

The supported variable types are:

- TextBox
- Single selection
- Multiple selection
- Existing object name

Up to 10 unique variables can be in a single subscription.

- For a text box, select **Equal to**, **Contains**, or **Starts with**, then type the value you want to use. (For example, Starts with: Building.)

    - **AND/OR** does not apply to the TextBox variable.
- For a single selection variable, it is treated as a multiple selection variable.
- For a multiple selection variable, you can select one or more of the options.
- For an existing object name, select the values.

Inside one combination, the relationship between variables is "AND", while inside one variable, it is "Or". For example, if the member selects **Location = "Burlington, Pasadena"**, **Priority = P1**, **Services = Email**, then that user wants to receive the alert from Burlington, P1, and Email, or Pasadena, P1, and Email.

Between combinations, the relationship is **Or**.

The resulting users are the **exact match**. That is, if the user has specific preferences, that user will not receive the alert that occurs at Burlington without other attributes.

To create a new combination:

1. Choose **Select Variables**. This step is <u>only</u> required for the <u>first</u> combination; subsequent combinations will use the same variable set.
2. Select up to 10 Incident Variables from the list.
3. Click **Save**.
4. For each variable, specify the set of values or criteria you want to be notified about.
    - The default value for a single selection or multi-selection variable is **Any**.
    - You cannot create a combination with all variables set to **Any**. One variable in the combination <u>must</u> have a value selected.
5. Select the Subscription Type:
    - **Admin Managed** — a combination that the Administrator predefines and can publish to the Member Portal, allowing members to subscribe to them. The Administrator can also opt-in individual contacts and groups to the combination directly from the Manager Portal.
    - **Member Managed** — a template that the Administrator pre-sets and can publish to the Member Portal, allowing the members to create their own combination. The created combination is editable and can be deleted from the Member Portal. The Administrator cannot opt-in individual contacts and groups to the combination template from the Manager Portal.
6. Select the edit option for your combination:
    - **Make editable** — Any subscriber to the combination will be able to edit the list of values of each of the Incident variables from the Member Portal. **Make editable** is disabled for **Member Managed** combinations. However, all subscriptions created by a Member from the template are editable from the Member Portal.
    - **Restrict Member-selectable values to those chosen above** — When selected, when the Member edits a combination from the Member Portal, they can only select a variable from the pre-selected list of

values set of the Administrator while creating the subscription combination. This option is only valid when the combination is editable.

7. Click **Add**.

In Manager Portal, combinations appear at the bottom of the page. Click **Show Details** to display elements of the combination such as:

- If it was published to the Member Portal
- If it is editable or restricted
- Last Updated date and time
- The combination values.

Click **Hide Details** to view the Subscribers View link and the combined values.

At any time, Administrators can edit or delete combinations from a subscription.

The Administrator can change the set of values or criteria for each variable, as well as the edit options. The subscription type cannot change after the combination is created.

The Administrator can edit combinations by the Administrator either from the **Subscription** page or a specific subscriber page.

- If edited from the **Subscription** page, the changes will apply to all subscribers.
- If edited from a specific subscriber page, the changes can be either applied to that subscriber or all subscribers.

About Subscribers

The Administrator can opt in individuals or groups for a specific subscription combination. Subscribers will automatically be notified when an Incident is created and matches the conditions defined in the combination.

Members will also see the subscription combinations to which they are subscribed from the Member Portal.

To add a subscriber:

1. Select the subscription in the Subscription table to list the combinations.
2. In the **Subscriber** column, select **Add** or **View**.
3. In the **Manage Subscribers** dialog, search and select individuals or groups.
4. Click **Save**.

Publish to Member Portal

To manage the list of subscriptions visible by the members, publish them to the Member Portal. When published to the Member Portal, members can see the subscription combinations and select the ones they want to be notified about, or they can create their own combinations from previously-created templates.

To publish a combination to the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or more combinations.
3. Select the **Publishing** menu.
4. Click **Publish to Member Portal**.

At any time, you can remove combinations from the Member Portal. However, they will still be visible to the members who are subscribed to them.

To remove a combination from the Member Portal:

1. Open your subscription from the Subscription table to access the list of combinations.
2. Select one or multiple combinations.
3. Select the **Publishing** menu.
4. Click **Remove from Member Portal**.

By default, members of all groups will have access to the published combinations. You can limit which members can see a specific combination in the Member Portal based on the groups to which they belong.

To restrict the visibility of combinations in the Member Portal:

1. Click **Show Details** in the table header to display the **Published** column.
2. Select a published combination.
3. Click **All/Edit** in the **Published** column.
4. Select the group to which you want to give visibility to the combination.
5. Click **Save**.

Members outside the specified groups cannot see the published combinations in the Member Portal unless they are a subscriber.

Click **Back to Subscriptions** to see your list of Incident subscriptions.

After your Incident subscriptions are created, in the **Contact** section of the Incident template, you can select the Sending Option: **Send to Incident subscribers** so that your Incident includes contacts in the template, as well as Incident subscribers set up in Settings.

Member Portal

The following are notes about the Public Member Portal and Private Member Portal:

- Subscriptions work for both the Public Member Portal and the Private Member Portal.
- Members can choose their Incident Subscription combination during the registration process.
- Members can opt in or opt out of any subscriptions.

    - After the member opts out of the combination, the combination remains displayed on the page, but the member no longer receives Notifications for that combination criteria.
    - The member can re-opt in at any time.
- Members can delete a subscription unless the Administrator published it to the Member Portal.
    - After the member deletes the subscription, it will be hidden from the Member Portal for that member only.
    - The subscription will not be deleted from the system unless there are no other subscribers.
- All subscription combinations to which the member is subscribed are displayed in the Member Portal.
- Members can create their own subscriptions if the subscription is a **Member Managed** subscription type.
    - Think of the subscription as a template. The member can create a subscription in the Member Portal from this template. Any subscription created by the member can be edited or deleted.
- Members can edit the subscriptions to which they are subscribed; if the subscription is a **Member Managed** subscription type, or if the subscription is an **Admin Managed** subscription type that the Administrator makes editable.
- A subscription combination subscribed to a group cannot be edited by the members.

In this example, the Administrator creates a combination. Select or clear a checkbox next to a combination name to opt in (subscribe) or opt out (unsubscribe). The member can edit the combination to which they opt in.

Scheduling

When selecting the **Send a calendar reminder via email** checkbox, choose the following prior to the start of a shift:

- Number: 1-100. The minimum number is 1.
- Days or Hours
- The minimum time is one hour.

Also, select whether to allow contacts to opt out of reminders. By default, contacts can opt out of reminders from the Member Portal.

Time applies to all calendars and layers where the **On-Call Reminder** is enabled.

Disabling **On-Call Reminder** removes all On-Call Reminder configurations made for calendars and layers.

Select the checkbox to enable schedule self-service for availability and replacement.

Refer to On-Call Reminders for more details.

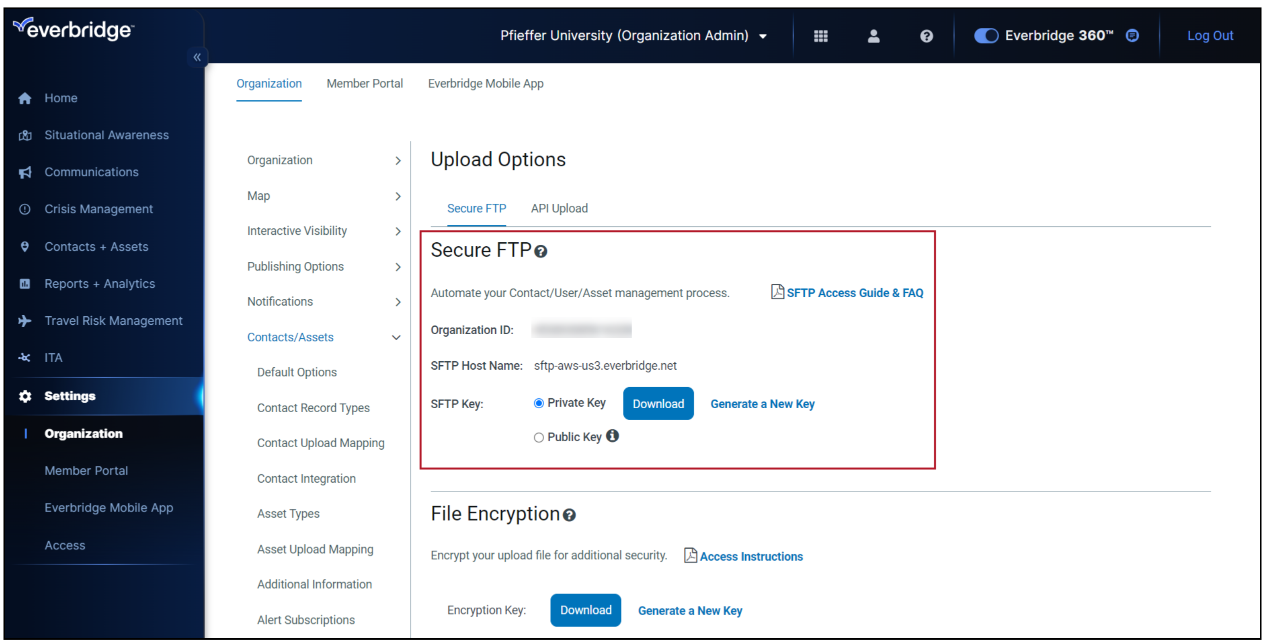
Upload Options

There are various ways to add contacts to Everbridge Suite from **Organization Settings** > **Contacts and Groups** (or **Contacts/Assets**) > **Upload Options**:

- Fill in a form for a single contact and save it to the database.
- Use a data file containing many contacts and upload it to the database.
- Configure another system to automatically add a file containing a number of contacts and upload it to the Everbridge database.

Secure FTP

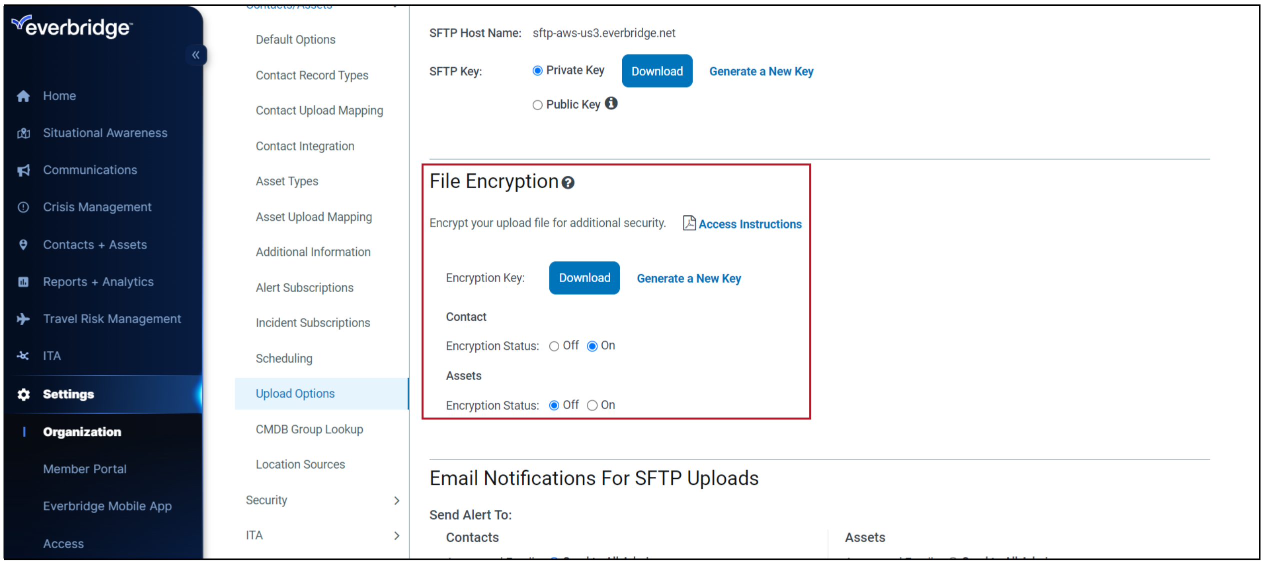
Most Organizations use bulk upload methods to add and manage many contacts at once. One way to automate the upload is through the Everbridge Manager Portal. You configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports **Secure File Transfer Protocol** (SFTP) to upload your file to Everbridge.



Using an automated system saves time and helps to prevent errors. You can use the Secure FTP software to manually upload files. This allows you to test your connection to Everbridge and make sure that your system is configured properly. If you are going to upload files manually, there is no advantage to using Secure FTP software instead of uploading through the Manager Portal.

File Encryption

File Encryption provides a standard encryption method (such as PGP) to generate encryption keys. The same encryption key can be used for both Contact and Asset uploads. The encryptions can be utilized together, separately, or not at all.



By configuring your computer system and Secure FTP software to work together, they can automatically add and install contact data updates. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.

FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

> **NOTE:** Only **.gpg** files are supported for Asset Data.

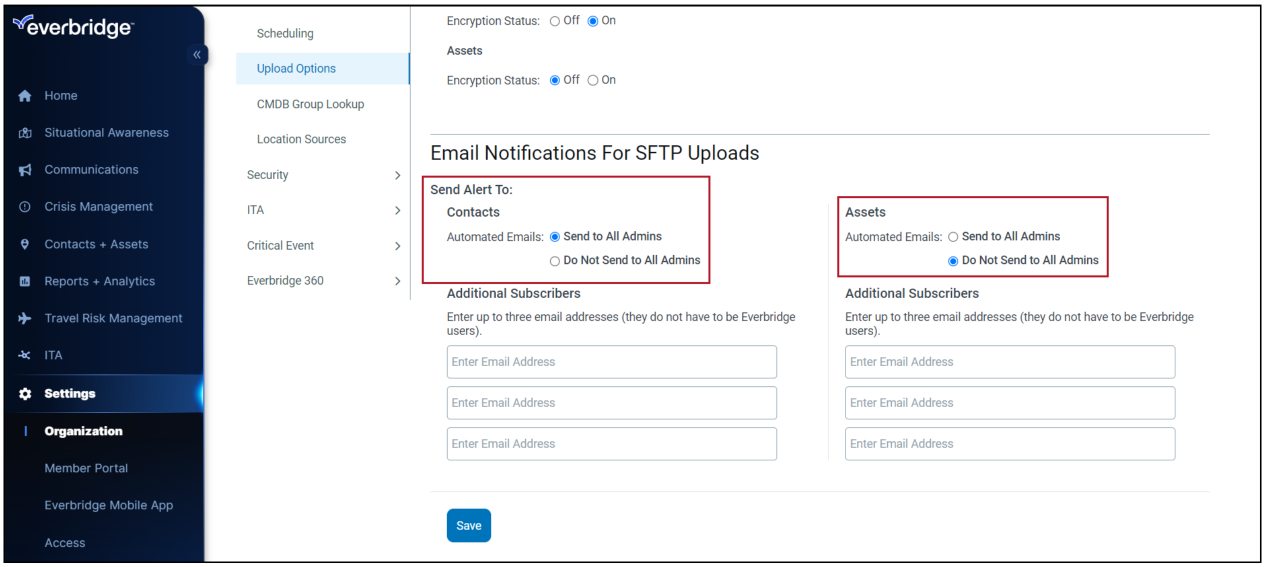
To use File Encryption for additional security:

1. From the **Organization** tab, select **Contacts and Groups** or **Contacts/Assets** > **Upload Options.**
2. From the **File Encryption** pane, set the **Encryption Status** radio button to **On.**
3. Click **Download Access Instructions.**
4. Save the file to your desktop.
5. Follow the instructions from the downloaded file.

NOTE: If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

Email Notifications for SFTP Uploads

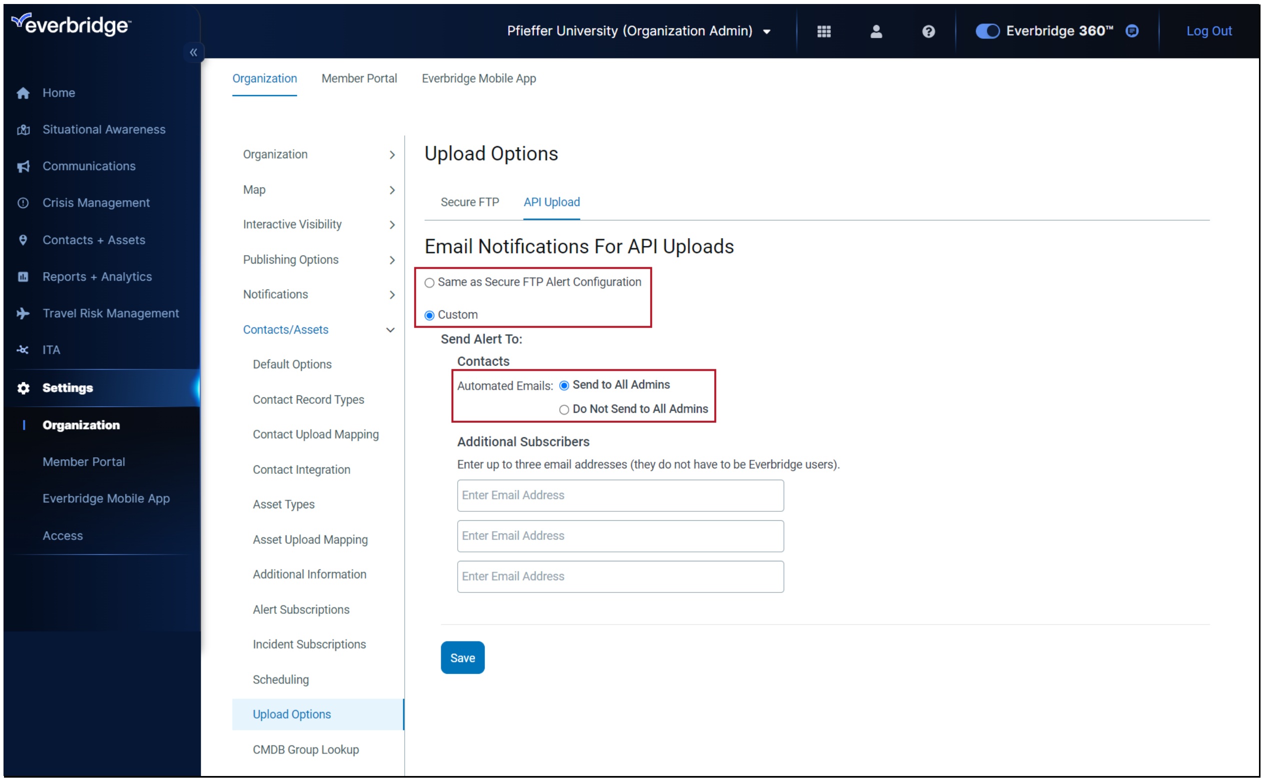
Organization Administrators can configure which email addresses are subscribed to receive Notifications when a new SFTP is complete. You can select **Send to All Admins** or **Do Not Send to All Admins**, which allows you to manually add additional subscribers.



FTP instructions are not provided in this document. If you have questions about using FTP, contact your IT department or your Client Services representative.

Email Notifications For API Uploads

Organization Administrators can specify which email addresses will receive a notification whenever a new file is uploaded via API.



They can use the following options:

- Same as the Secure FTP Alert configuration
- Custom
  - Contacts:
    - Send to All Admins
    - Do Not Send to All Admins
  - Additional Subscribers: Enter up to three email addresses. Note that they don't have to be Everbridge users.

Groups

The **Groups** section is visible only if **Sequenced Groups** is enabled for your Organization. Sequenced Groups allow contacts to be put in a specific order in designated groups.

In the **Contacts > Groups** page, you can order the contacts of a specific group. When creating a notification, you can select this group, turn on Sequencing in the notification, and enter a wait time between contacts. Otherwise, leave Sequencing off to use it like a standard group.

NOTE: The Sequenced Groups feature is available only if your Organization has **Incident Management** enabled.

CMDB Group Lookup

For use in Incident Templates, the **Configuration Management Database (CMDB) Group Lookup** feature automatically identifies the groups to notify based on selected Incident Information variables.

To begin, first define a set of properties and their values, then create a mapping between groups and their properties or values.

When configured in an Incident Template, the group defined in the mapping is automatically targeted when the combination of properties and values matches. Each property is an **AND** operation, and each value in a property is an **OR** operation.

Properties

Per group, you can define up to 15 properties, and each property can have a maximum of 15,000 values. Each property and value name can be up to 260 characters.

You can create properties manually, in a CSV upload, or via the public REST API.

Create properties manually

To create properties manually:

1. From the **CMDB Lookup** page, click **Properties**. The list of properties and their values appears.
2. Enter a property name. Property names are case insensitive and must be unique.
3. Enter the property's corresponding values and press ENTER between each value. Property values are case insensitive.
4. Optionally, to delete an existing property, click the Trash Bin next to its name and click **Yes** to confirm the deletion.

Edit properties manually

To edit properties manually:

1. Click the **Pencil** icon of the property.
2. Change the property name and property values, as needed.

- Property names and values are case insensitive and must be unique.

3. Click **Save**.

NOTE: If you change a property's name and that property is mapped to an **Existing Object Name** Incident variable, you must also update the **Existing Object Name** Incident variable.

Delete properties manually

To delete properties:

1. Click the **Trash Bin** of the desired property that you want to delete.
2. Click **Yes** to confirm the deletion.

NOTE: If you delete a property that is used in an Incident rule, you must update that rule and any **Existing Object Name** Incident variables that use the property.

Add properties via a CSV file

To add properties and their values via a CSV file:

1. Navigate to the **Properties** tab and click **Upload**. A pop-up window appears.
2. In the pop-up window, click **Download Template** to download a template specific to properties. The file name will be `cmdb-properties-ORGID.csv`, where `ORGID` represents the Organization's ID.
    - Alternatively, you can use a blank spreadsheet and add each property as a column and each value as a row.
3. Replace the **Property** column headings in row 1 with your actual property names.
    - If you do not use all 15 properties, leave the unused properties blank, or remove the columns from the template.
4. Save the template with a unique CSV name.
5. After filling in the spreadsheet, click **Upload**, and then click **Upload** in the pop-up window that appears.
6. Select or drag and drop the CSV file and click **Upload.**
7. Scroll to the right to view all of the properties.

Upon upload, new properties and their values will be added. Values of existing properties will be updated as defined in the CSV. New values will be added and existing values that are not in the file will be removed.

If a property is used in an Incident rule, when values are updated, the rule is not affected.

There cannot be more than 15 properties, with each having up to 15,000 values. This means:

- If more than 15 properties are listed in the file, the import will fail.
- If a file contains duplicate properties, the import will fail.
- If the file includes more than 15,000 values for a specific property, that property will not upload, but the others will upload.
- If a file includes properties with improper characters for either name or values, that property creation will fail. However, the full import will succeed.

To view import logs and failures, click **Upload Log.**

> **NOTE:** You cannot delete properties using CSV upload. if an existing property is not listed in the CSV file, it is ignored during the upload and remains unchanged. You can only delete properties manually.

Export existing properties and their values in a CV file

To export existing properties and their values in a CSV file, navigate to the **Properties** tab and click **Export Properties**.

You can export all existing properties to a CSV file named **cmdb-properties-ORGID.csv**, where ORGID represents the Organization's ID. You can use this file to upload changes to your properties. Each property appears in a separate column, with one row for each value.

Display upload history

To display the upload history:

1. Navigate to the **Properties** tab.
2. Click **Upload Log**. The status of the Organization's CSV uploads appears.
3. Click the View icon from the desired name to see the error log details.
4. Click **Back to Upload Log** to return to the **Upload Log** page.

Mappings

There are two methods to add mappings.

- Upload a CSV file of groups and their mappings.
  - When uploading mappings via a CSV file, you can also create properties and add values.
- Manually add a group and its mapping.

The groups must exist in your Organization. Per group, you can have up to 15 properties with a maximum of 15,000 values. Each property is an **AND** operation, and each value in a property is an **OR** operation.

> **NOTE:** There is no limitation on the number of rows being uploaded as long as the CSV file does not exceed 12 MB.

Upload via CSV file

To add a batch of groups and their mappings via a CSV file:

1. From **Upload**, download a template specific to CMDB Group Lookup, **cmdb_ORGID.csv**, where ORGIID represents the Organization ID.
   - You can also use a blank spreadsheet, and add your groups in Column 1 and each property as an additional column.
   - The heading of Column 1 must be **Group**.
2. Replace the **Property** column headings in row 1 with your actual property names.
   - If you already created properties, they will be listed in the template. You can add new properties as needed.
   - If you do not use all 15 properties, leave the unused properties blank or remove the column(s) from the template.
3. As needed, fill in each row with group names and their corresponding properties.
4. Separate group names and property values using the pipe (|) character. Do not add any spaces before and after the pipe character.
5. Save the template with a unique CSV name.
6. Select **Upload** to upload a batch of groups into your **CMDB Group Lookup** table.
7. Select or drag and drop your CSV file and click **Upload**.
8. Scroll to the right to see all the properties, if needed.
9. Resize each column in the table. To do this, hover the mouse on the line in-between two columns, hold down the mouse button, and resize. Release the mouse button when you can see all values in the properties.
10. Proceed to **Properties** to filter each column.

Upload options

When uploading a mapping for the first time or during subsequent uploads, you are presented with three options:

Option	Description
Create/Update	• Add new properties, new values to existing properties, and new mappings. • Will not change any existing mappings. • Will not impact any existing Incident rules or Existing Object Name Incident variables that use your properties.
Override Mapping	• Add new properties, new values to existing properties, and new mappings. • Will delete all existing mappings and create a new one according to the file. • Will not delete any properties and will not impact any Incident rules or Existing Object Name Incident variables that use your properties.
Override Everything	• Replace all existing properties and mappings with new ones. • Will delete all existing properties and all existing mappings and create new ones from the file. ◦ All Incident rules using those properties will need to be updated. • Will not impact Existing Object Name Incident variables that use your properties as long as the new property names still match.

You cannot use these options to remove a property value. To remove unused property values, upload your properties from the **Properties** tab.

Manually Add Mappings

To manually add a group and its mappings:

1. Click **Add Mapping** to manually add an existing group and up to 15 properties and their corresponding values to each property.
2. From the **CMDB Group Lookup** page, click **Add Mapping**.
3. Select a group name from the **Group** menu.
4. For each property, select the values from the corresponding drop-down list. You can select all the values in the list, if needed.
5. Click **Save**. In the table, hover the mouse over a cell of multiple values to see all of them at once.

Edit Mappings

To edit group mappings:

1. Click the Pencil icon of the group.
2. Change the group filters, as needed.
    a. To remove an existing filter, click **X**.
    b. To add a filter, click the Down arrow and select the filter name.
3. Click **Save**. Optionally, click the Cancel icon to cancel the operation.

Delete Mappings

To delete group mapping:

1. Click the **Trash Bin** of the desired group name that you want to delete.
2. Click **Yes** to confirm the deletion.

> **NOTE:** Deleting a group mapping does not update the properties.

Retrieve existing CMDB Group Lookup table

To get a list of the existing CMDB Group Lookup table, from the **CMDB Group Lookup** page, click **Export Mapping**. A CSV file is generated.

You can do any of the following in the file:

- Update the CSV file, as needed. You can enter multiple values separated with a pipe (|) character.
- Save the file and upload it to the desired Organization.

Display upload history

To display the upload history:

1. From the **CMDB Group Lookup** page, click **Upload Log.** The status of the CSV uploads for this Organization appears.
2. Select the **View** icon from the desired name to see the error log details.
3. Click **Back to Upload Log** to return to the **Upload Log** page.

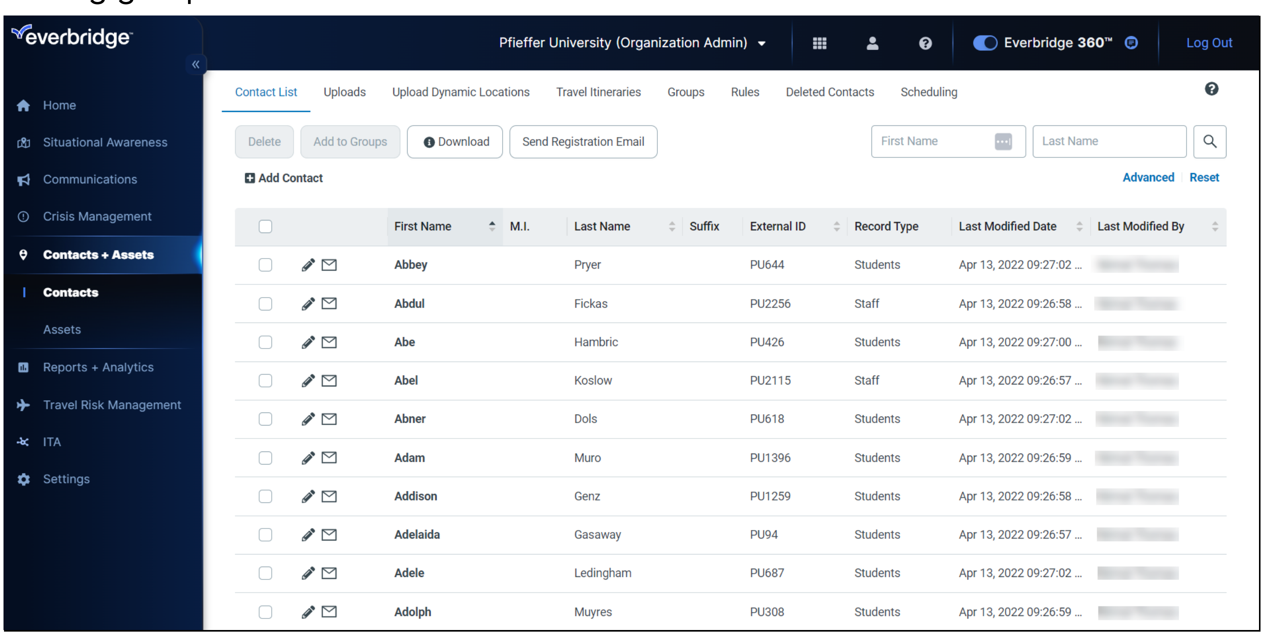
Contacts

Contacts are people who receive Notifications from your Everbridge Organization.

The information your Organization uses in Contacts can vary but some sources include:

- Business, health care, and higher education Organizations can load employee contact information from a Human Resources system.
- Vendors and customers can be loaded from a Contact system.
- Higher education Organizations can bring data from a Student Information system.
- Regional and local governments can use emergency and non-emergency residential and business phone lists.
- Governments can open a public portal where citizens can register with their contact information and opt-in to receive Notifications.

An Organization sends Notifications to its own contacts. The contacts in an Organization can be assigned to one or more groups. Contacts can be assigned to groups to make organizing them and sending Notifications to them quicker and easier. You can select one or more groups to receive a Notification. An account administrator can add a Group Manager for a group within an Organization. See the *Permissions Grid* on the **Roles** page for an understanding on who can perform Everbridge Suite activities such as managing contacts, sending Notifications, and adding groups and rules.



From the **Contacts** tab, manage your contacts with the following:

- Maintain Contacts
- Upload Contacts
- Contacts: Groups and Rules
- Delete and Restore Contacts

NOTE: To upload dynamic locations, see *Uploading Dynamic Locations* in the *Safety Connection User Guide*.

View Contact List

The list of contacts is sorted alphabetically by Last Name by default. You can sort by a different value by clicking the desired column heading. Click the column heading again to reverse the sort order.

User Status	Description
Pencil	Use the **Pencil** icon to edit a contact's information.
Envelope	Send Registration Email. The user is not yet registered. Select the checkboxes in the rows containing the users' names and then click the Send Invite button. (Or, if the Send Invite button is not displayed, select **Member registration** from the **Send Invitation Email** drop-down list.) Or, click the Envelope icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the system. Private Portal and Device registration invitations expire after 30 days compared to 72 hours for user registration requests.
Everbridge Mobile App	Send Everbridge Mobile App Quick Registration. Select the checkboxes in the rows containing the users' names and then select **Mobile device registration** from the **Send Invitation Email** drop-down list. Or, click the **Device** icon in the row containing an individual user's name. When the user receives the email, he or she can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the Member Portal. You see the **Device** icon and the **Everbridge Device Registration** selection only if the following three conditions are met: 1. Your Everbridge representative has selected Everbridge Mobile App in the Account/ Organization pages of EBAdmin.

	2. There is a Mobile Push Alert delivery method identified in **Settings** > **Organization** > **Notifications** > **Delivery Methods**. 3. The Private portal type is selected in **Settings** > **Member Portal** > **Portal Options**. Private portal registration invitations expire after 30 days compared to 72 hours for user registration requests. For details on registering, see the *Everbridge Mobile App User Guide*.
Secure Messaging	Select the checkboxes in the rows containing the users' names and then select **Mobile device registration** from the **Send Invitation Email** drop-down list. Or, click the **Device** icon in the row containing an individual user's name. When the user receives the email, they can select the link to go directly to the Registration page. Once registered, the user becomes active and can use the Secure Messaging app.

At the bottom of the list, the page counter shows you which page you are viewing and how many pages contain the entire list. The drop-down field shows how many contacts are currently displayed per page. The record counter shows the records currently displayed and the total number of records in the Organization.

Use the arrow buttons (**First Page**, **Previous Page**, **Next Page**, and **Last Page**)to step through the pages. Or, to go directly to a page, type the page number in the **Page** field, and press **ENTER**.

Download Contact Records

You can download your Contact Records in a Comma-Separated Values (CSV) file. Use the CSV file as a starting point for making changes or restoring the contact data.

- To download a CSV file containing all contacts, make sure all checkboxes are clear for all records, then click **Download**. Save the file to your local computer resource.

  Everbridge Suite screens the data before downloading to your local system. If there is any suspicious content (for example, strings that start with = + - @ “ and when - or + are followed by a number) in any text field, then the CSV-formatted file will be downloaded using a TXT file type during the download.
- To download a CSV file containing only some of the contacts, select the check box in the row next to each desired contact.

  > **NOTE:** The selections must be from a single page, so you might first need to adjust the number of contacts per page. Use Page Controls to adjust the number of contacts per page.

  Click **Download**. Save the file to your desktop.

Create Groups

Preparing messages, lists of recipients, and other aspects of the Notification in advance reduces the chance of human error in sending and responding to Notifications. Groups are a way to organize your contacts for quick selection.

Groups

Groups are static, or fixed, lists of contacts that you can maintain.

When you are going to send a Notification, you can select groups as targets rather than select contacts individually. You can add a group for any set of contacts that have something in common. A contact can be in more than one group. This allows you to target exactly the contacts who should receive the Notifications. For example, a manager might be in the “Sales” group in addition to a “Managers” group. Individual contacts and groups can be nested within a group, such as “Joe Hamilton” individual and the “Fire Department” and “Police Department” groups nested in a “Public Safety” group.

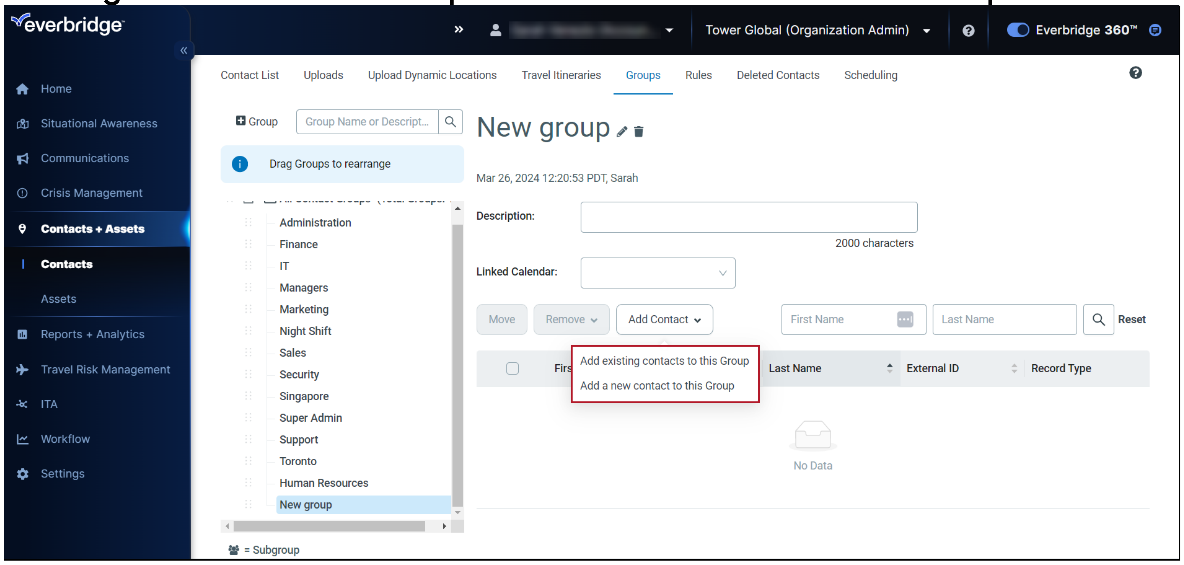
By adding a set of groups before you need to send a Notification, you are ready to respond quickly.

Add a group

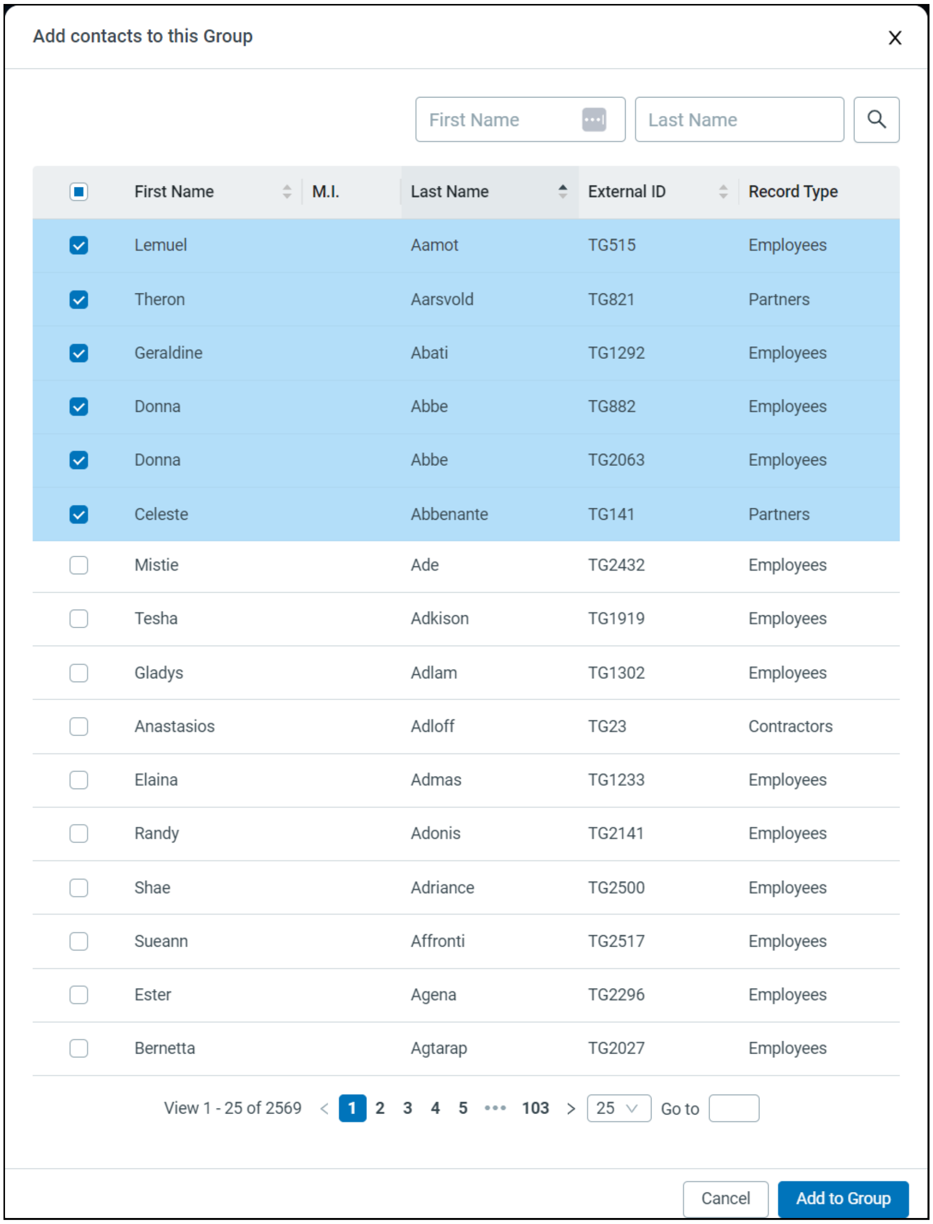
To add a new group:

1. From the **Contacts** tab, select **Groups**.
2. On the left-hand panel, select **All Contact Groups** or the desired group name if you want to nest a group within a group.
3. Click **+Group**, above the list of existing groups.
4. Type a name for your new group and press ENTER. The new group will open after being created.
    - Optionally, in the **Description** field, enter a description of the group using a maximum of 2,000 characters. Your description is automatically saved. (To modify the description, simply type in the Description field.)

5. Select **Add Contact**, above the list of Contacts. Then, select either **Add existing contacts to this Group** or **Add a new contact to this Group**.



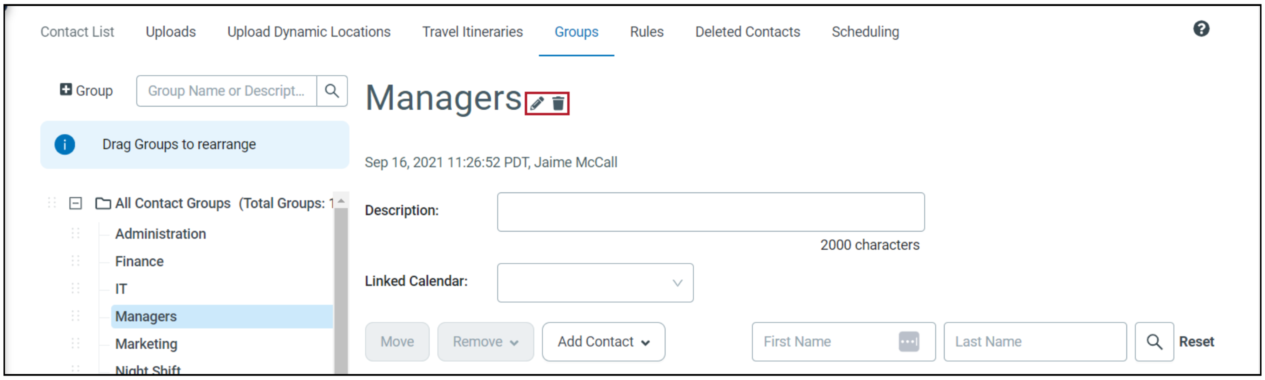
6. The **Add Contacts to this Group** dialog appears. Select the checkboxes of the contacts you want as a part of this new group and click **Add to Group**.



7. The list of contacts appears. Optionally, in the Description field, enter a description of the group using a maximum of 2,000 characters. Click **Done.** (Click Edit to modify the description. Then, click Done again.)
8. Optionally, in the Linked Calendar field, select the desired calendar from the drop-down list. This feature is only enabled when Scheduling is enabled. (Click Edit to select a different calendar. Click the X to delete the current calendar. Then select from the drop-down list.)
9. To order the contacts within a group, select the **Add a sequence** checkbox. (See To order the contacts within a group.)

Manage Groups

To edit or delete a group, select either the **Pencil** or Trash **icons** next to the group's header.



Rearrange Groups

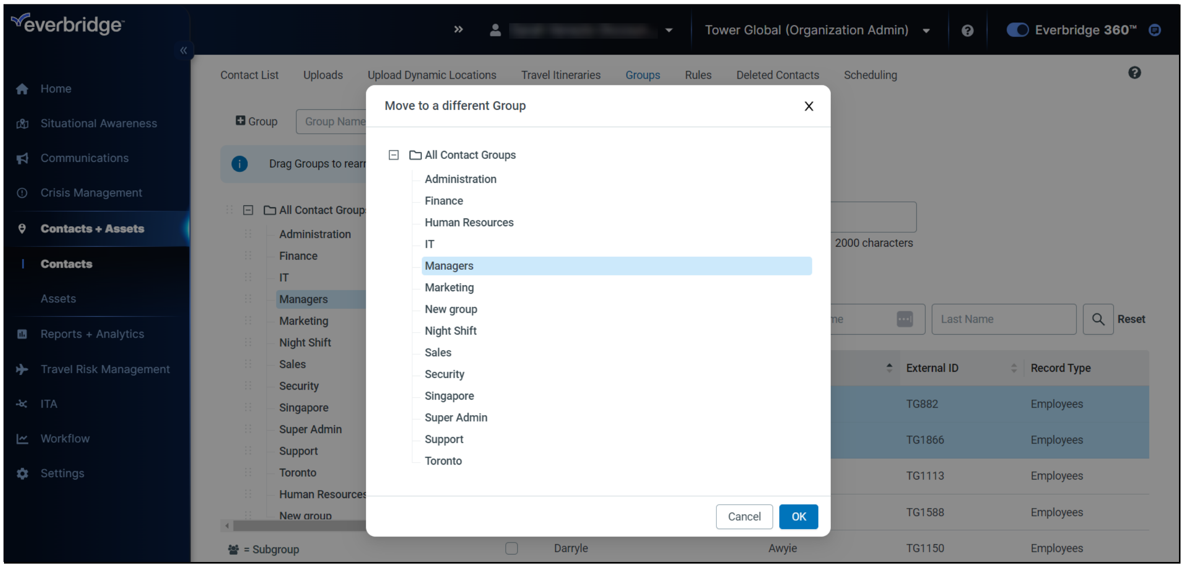
To rearrange groups:

1. In the **Search** field, type a group name or part of a group description. The **Results** list appears:
   - **Group Name**: Type all or part of the group name you want to rearrange and press ENTER.
   - **Description**: Type part of the Description you entered for this group.
2. Drag the group name to its new location.

Move Contacts Between Groups

To move contacts from one group to another:

1. From the **Groups** subtab, select or search for the desired group name.
2. In the right-hand pane, select the checkboxes of the contacts you want to move from the group.
3. Click **Move**. The **Move to a Different Group** dialog appears.



4. Select the group name to move the selected contacts to and click **OK**. The selected contacts are moved to the other group and are no longer contacts in the current group.

Ordering Contacts Within a Group

If your Organization has enabled **Sequenced Groups**, you can order the contacts within a group. Leave Sequencing off to use it like a standard group.

> **NOTE:** The Sequenced Groups feature is available <u>only</u> if your Organization also has Incident Management enabled.

1. From the **Groups** subtab, select or search for the desired group name.
2. Select the **Add a sequence** checkbox. The contact names are numbered sequentially by last name.
3. To reorder the numbered contacts, drag-and-drop and/or manually reorder:
    a. **Drag-and-Drop:** On the displayed page, you can drag-and-drop a name to reorder it. Select the Sequence header, select the contact to be moved, and drag the name to its new order.
    b. **Manually change the order number**: Select the number next to the contact name. A **Move to Position** dialog appears, from which you type the desired order number and click **Move**.

> **NOTE:** You can type only numbers, but not “0” (zero) or a number after the last person in the group.

To remove contacts from a group or a group and its subgroups:

1. From the **Groups** subtab, select or search to the desired group name.
2. In the right-hand pane, select the checkboxes of the contacts you want to remove from the group or the group and all its subgroups.
3. From the **Remove contacts** drop-down list, select either **from this Group** or **from this Group and its subgroups**.
4. Click **Yes** to confirm you want to remove the contacts from the group.
5. Look at the list of contacts. The selected contacts are removed from the group.

Linked Calendars

If the Scheduling option is enabled, the **Linked Calendar** field appears on the **Groups** page. Linking a group to a calendar allows you to send a Notification to on-call staff of the linked calendar. To link a calendar:

1. Click **Select.**
2. Select the calendar you want to link.

You can also select a different calendar by clicking **Edit** or delete the current calendar by clicking the **X**.

Create Rules

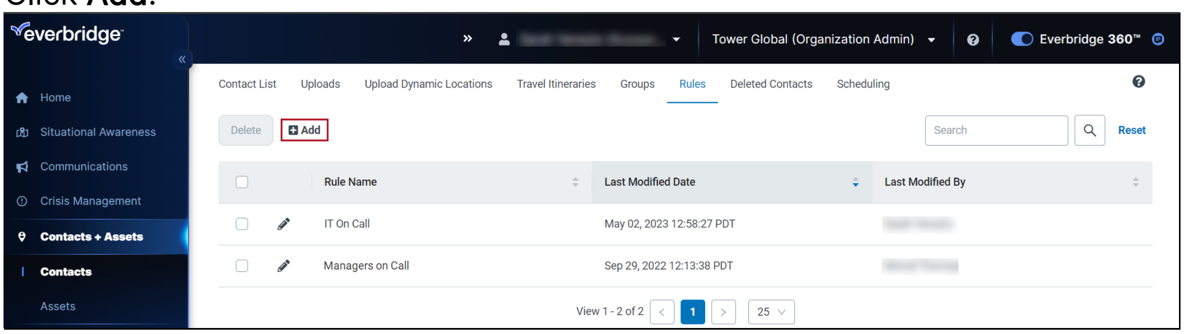
Preparing messages, lists of recipients, and other aspects of the Notification in advance reduces the chance of human error in sending and responding to Notifications. Rules are another way to organize your contacts for quick selection.

Rules

When you send a Notification, you can apply a rule based on the characteristics of the contacts who will receive the message. Rules are a dynamic way of selecting contacts using multiple filters based on their contact information, such as Name and Location, or Additional Information, that is custom to your Organization. So, even if new contacts have not yet been added to the “Fire Department” group, they could still be located at a Fire Station address where they have an address in the area.

To add a new rule:

1. From the **Contacts** tab, select the **Rules** subtab.
2. Click **Add**.



3. Type a name for your new rule.
4. Select a field from the **Add Filter Search** drop-down list.
5. See Filtering Your Search for details and examples.
6. Select the Condition from the drop-down list and type the Value.

> **NOTE:** When using groups in rules, select Calendar as the condition. For details about groups in rules, see Understanding How Sequenced Groups Work in Rules.

7. Optionally, select:
   AND-set up another field-condition-value to be included in the rule.
   OR-set up a different field-condition-value to be included in the rule.

> **NOTE:** When a rule includes "OR" logic in the search conditions, you will be unable to see it in the Universe > Filter > Existing rule list. By design, the rule is hidden.

8. Repeat Steps 4 through 7 for each additional filter you need to use. (You can add up to 10 "OR" filters.)
9. Optionally, click **Contact Preview** to see the contacts matching your new rule.
10. Click **Save**. The new rule is listed in the Rules list.

Edit a Rule

1. If you have numerous rules, use the Search feature to find it.
2. Click the Pencil icon in the same row of the rule. The Update Rule page appears.
3. Make your changes.
4. Click **Save** after you have modified your rule.

Download a List of Contacts Based on a Rule:

1. Click the Pencil icon in the same row of the rule. The **Update Rule** page appears.
2. Click **Download**. A list of contacts in a CSV file based on your rule is downloaded.

Delete a Rule:

1. Select the checkbox next to the rule to be deleted.
2. Click **Delete**.
3. Confirm the deletion.

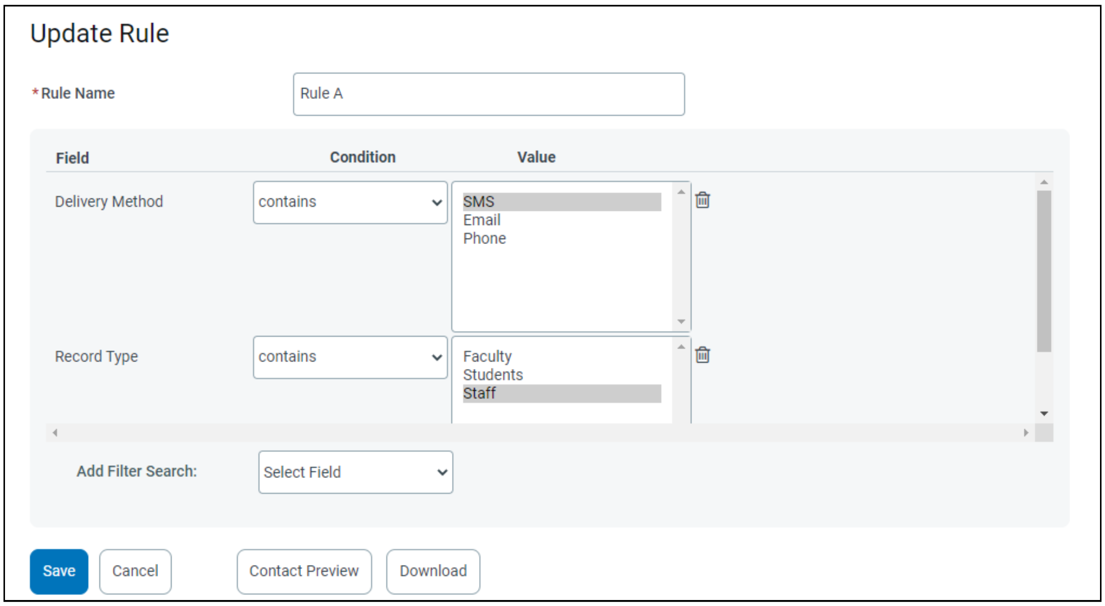
Understanding How Sequenced Groups Work in Rules

In the **Groups** pane, you will see the type of group: standard (no icon) or sequenced ( ). If Sequencing is turned off in Settings, the sequenced group displays as a standard group.

The following workflow is provided as an example:

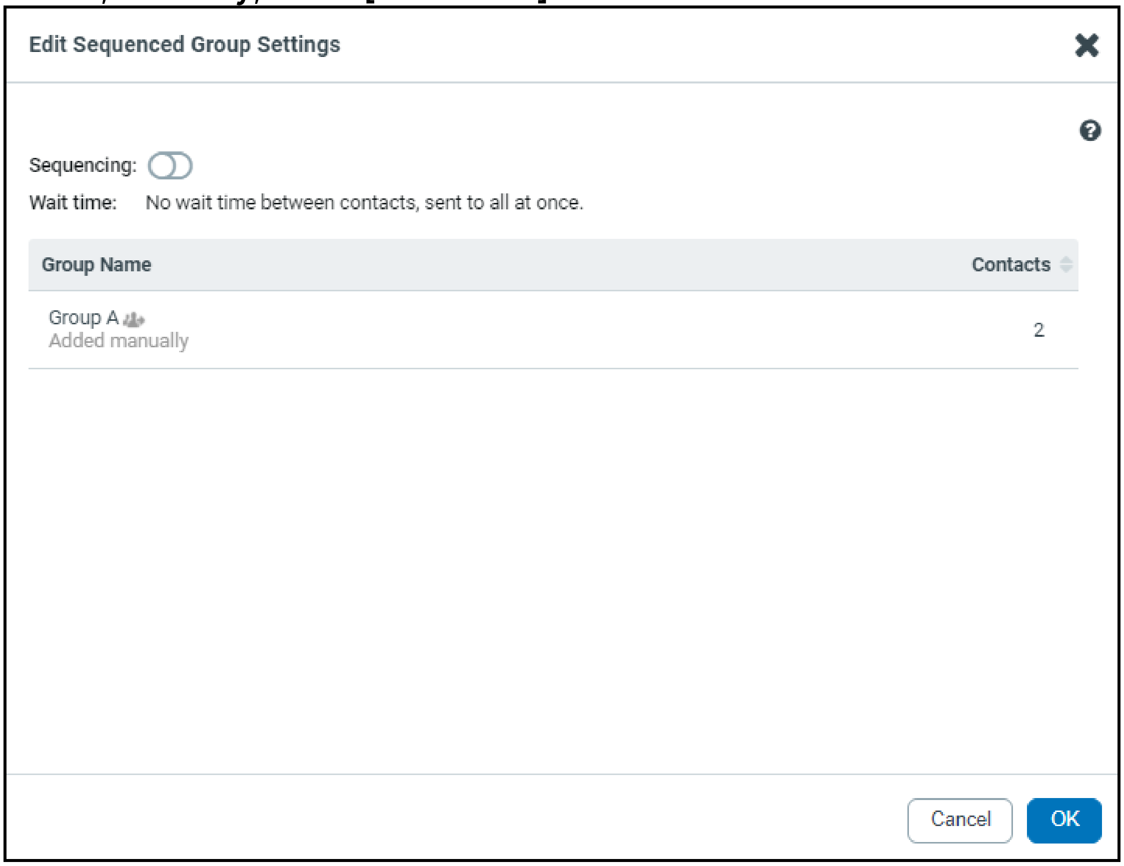
- **Contacts** > **Groups**:
  - Administrators, a sequenced group, consists of three contacts:
    - Contact 1 works the Monday shift
    - Contact 2 works the Monday shift

        - Contact 3 works the Friday shift
- **Contacts** > **Scheduling**:
    - Make sure your calendar (Primary On-Call in this example) is ACTIVE
    - The Fourth Shift is part of the Primary On-Call calendar
    - The Administrators group is linked to the Fourth Shift
- **Contacts** > **Rules**:
    - The criteria for Rule A is the Primary On-Call calendar and Fourth Shift, Monday, as shown in the following graphic. The Date Range must be a range from a specific date to at least the next day. For Monday, choose a Monday in the first Date Range and select Done. Then, select at least the next day and select Done. (Similarly, the criteria for Rule B is the Primary On-Call calendar and Fourth Shift, Friday.)



    - Click **Preview** to see the contacts in this rule.

The **Edit Sequenced Group Settings** dialog shows the group name and how it was added, **Manually**, or **via [Rule Name]**.



When you toggle the Sequencing to ON:

- In the **Wait Time** field, enter a number in minutes or hours (from the drop-down list) between contacts. (The default wait time is 5 minutes.)
- In the **Default Responses Needed** field, set this number so that you do not need to change it each time in the template. Setting this number can also be used for groups where Sequencing is turned off, then on again. For example, if you set up a rule that uses the Calendar filter with On Shift set to Now, the contacts returned would be different each time depending on the time of day.
- The Responses Needed column defaults to 1. The maximum responses are the maximum in the Count column. If you keep the Responses Needed: 1, and escalations are used (Total Responses Needed: 1), the Notification stops sending as soon as a contact from the Sequenced Group responds.

Or, if you keep Responses Needed: 1, and the escalation Total Responses Needed is 2, for example, then the Sequencing stops, but the Notification escalates until it gets the second response.

Managing Your Contacts

After configuring the contact settings, you can add contacts to Everbridge Suite. Contacts can be added individually or through an upload process. The following sections provide more detail:

- Adding Contacts Individually—Manually Adding an Individual Contact
- Preparing to Upload Contacts— Upload a Contact Data File via SFTP and Upload a Contact Data File via the Manager Portal.

You can also edit and delete contacts individually or through an upload process.

Generate a Reset Password URL

Any user who has Contact Management permissions can directly copy a URL to reset a password via the Member Portal for specific members. (The member can log in to the Member Portal and change the password again, as needed.) Or, the Account Administrator can copy and send the URL to a member via any delivery method. The member accesses the URL to reset the password.

General Information

The **General Information** section of the contact record contains the name and ID information for the contact. Required fields have a red asterisk (*) next to the field label.

- The **External ID** must be unique in the Organization. The unique ID prevents duplication of records and customizes individuals with the same name. Your Organization might use Employee ID numbers or some other plan that contains unique IDs.
- **Records types** in the menu are configured by the administrator for this particular Organization.
- The **SSO User ID** is shown here, if applicable.
- **Original Organization** is a display-only field showing the original Organization name for this contact.

Groups

From the **Add** or **Edit Contact** dialog, you can add and remove the contact to and from selected groups. Click **Manage Groups**.

Secure Messaging Information

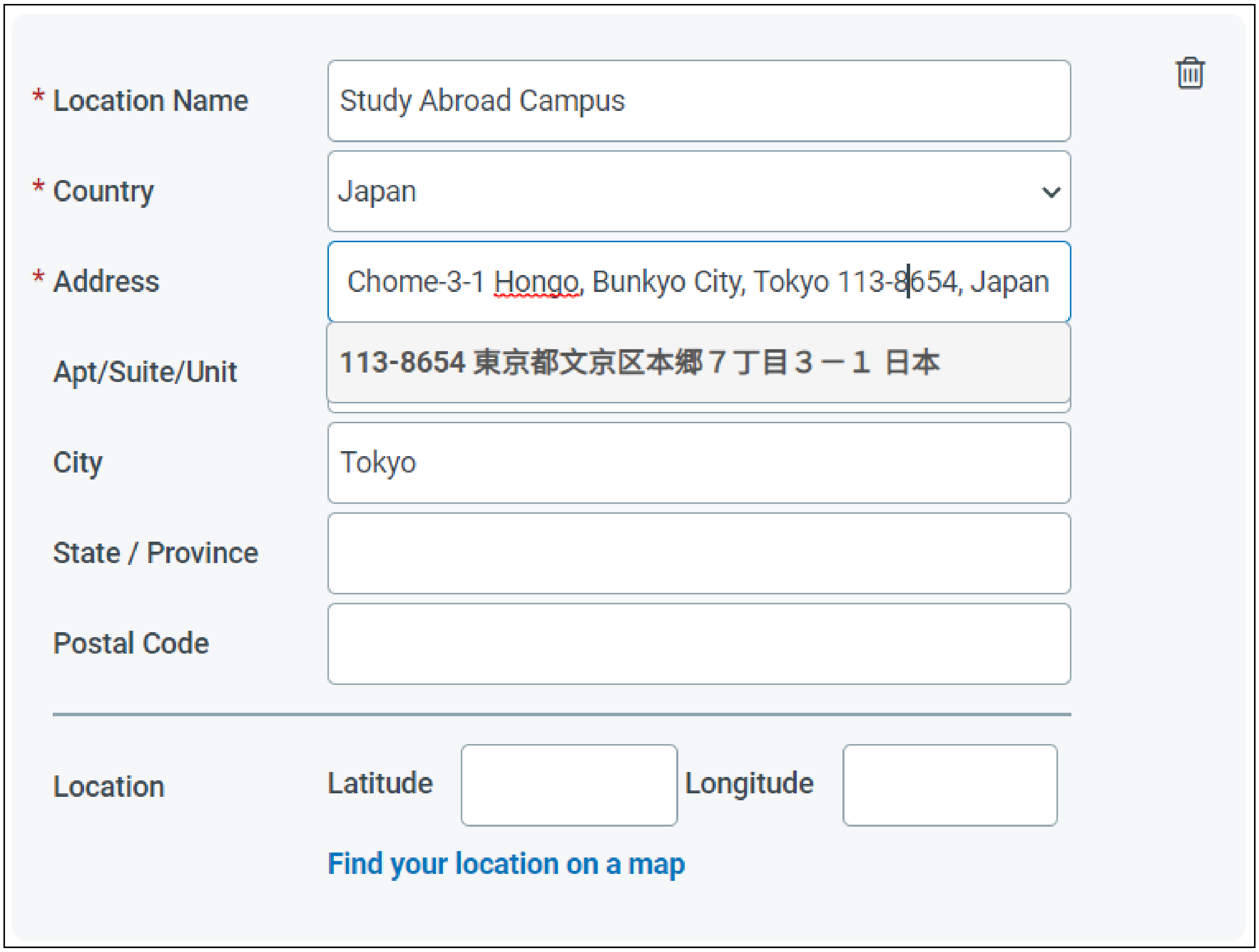
If the contact is a Secure Messaging user, the display-only field shows Yes. Likewise, if the contact is not a Secure Messaging user, the display-only field shows **No**.

Static Locations

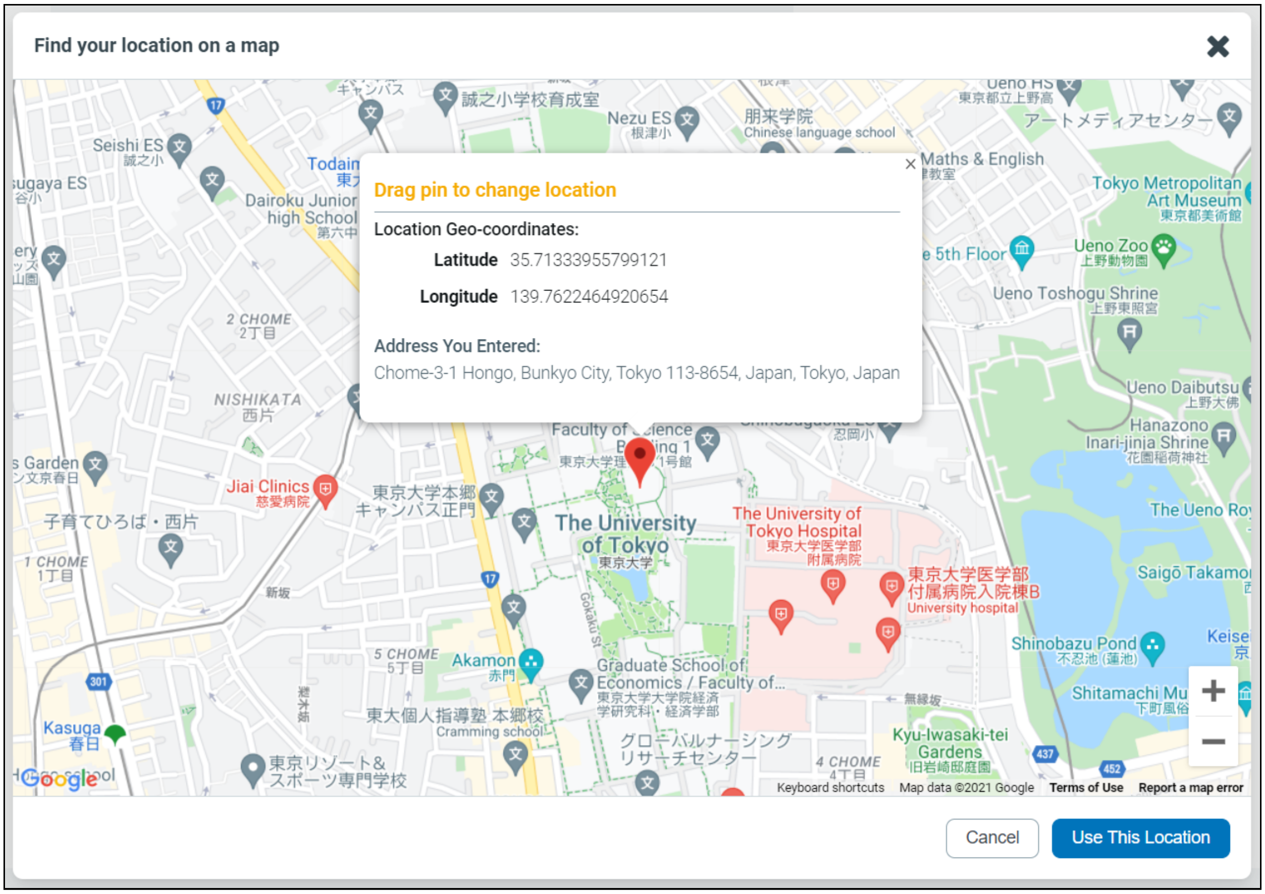
The **Static Location(s)** section of the contact record allows you to define up to five locations for each contact. These locations can be used to include the contact in a Notification sent using map addresses. Click either **Enter Address** or **Add another address**.

Location Name can be used when you send a Notification; for example, “Work” or “Home.” Verify the correct Country is selected. Enter address information, up to the Postal Code field. The system attempts to convert this address into a standardized format from the list.

For an international address, select the desired country from the Country drop-down list. Using US English, type the entire address in the Address field and the city in the City field. If supported, suggested addresses are displayed in the country's local language; otherwise, suggested addresses are displayed in US English.



The selected address is automatically geocoded so that you can notify this contact using the map. Select the link: **Find your location on a map**. Verify the location, then click **Use This Location.**



Click **Add another address**, as needed.

To remove a location, click the Delete icon (X).

Travel Arranger

Add an existing contact as a Travel Arranger for a contact.

Click the link: **Add using existing contact record** and select the contact name.

Click **OK** and the name is listed in the Travel Arranger pane. Add more travel arrangers, as needed.

Delivery Methods

The **Delivery Methods** section of the contact record contains the message delivery information for the contact. This is the section where you configure the device details to deliver a Notification to this contact, including mobile phone numbers, email addresses, and so forth. The delivery methods in the list are configured for your Organization.

Select one or more delivery methods from the list. Adding more delivery methods means that it is more likely the message gets through to the contact as quickly as possible. For each delivery method, supply a device address or phone number.

- **For email addresses**—Use SMTP format. That is, username@example.com.
- **For phone numbers**—Confirm the Country to ensure the system uses the correct dialing instructions and that the message is sent from the correct location. Then enter only the digits of each phone number. Refer to this Knowledge Base article in the Everbridge Support Center for more details.

  If the system calls a phone number and reaches an answering machine or voice mail, it waits a short time for the announcement to play before leaving a message.

  When a message is sent to this contact, Everbridge tries the delivery methods, one after another, until the contact responds or until it has tried all the methods. The system uses the order of the list. To reorder the delivery methods, use the Up and Down arrows to move them accordingly.
- If selected in **Settings**, in the **Status** column, "ON" enables you to turn off the delivery method so that it does not receive any Notifications and specifies quiet periods. Then, also select the blue icon to set up the quiet time of the delivery method. (If the contact's time zone has not been set, select the time zone from the **Set Up Contact's Time Zone** dialog. After you click **OK**, you can set the quiet time.) From the **Quiet Time - [Delivery Method]** dialog, give the Quiet Time a name, select the days and time range (or click the 24 Hours check box). Click **OK**. The Quiet Time name appears alongside the delivery method.

Everbridge recommends you place text paths, such as SMS and email, higher in the order than voice-based methods. In the event of an emergency, a voice message might be difficult to hear, while a text-based message will be clear.

> **NOTE:** The Everbridge Mobile App is not on the list of delivery methods until the contact downloads the application and logs in. You do not need to add it to the list.

Additional Information

The **Additional Information** section of the contact record contains custom fields configured by your Organization. An Additional Information field can be a:

- text box, where you type a value (if a Date, use format: yyyy-mm-dd).
- date field, where you select a date by clicking the Calendar icon and selecting the date.

- single-select list, where you select one value from the drop-down list.
- multi-select list, where you select one or more values from the drop-down list.

If configured for your Organization, select a field to add for this contact. Example custom fields are: Office Location, Floor or Building, Badge ID, Certifications or Training, Specialties, and Special Assistance Needed.

For multi-select lists, from the Values/Possible Values, select the desired one and click the Right arrow (>) to move the selection to the **Selected** list on the right-hand side of the panel. Continue to assign values, as needed, and click **Save**.

To remove a value, select it from the right-hand **Selected** list, and click the Left arrow (<) to return it to the Values/Possible Values list. The double arrows (<< and >>) move the entire list of values from one side to the other.

Alert Subscriptions

The **Alert Subscriptions** section of the contact record displays the number of weather subscriptions, if any, and a link to manage subscriptions for a particular contact. The subscriptions must first be added by an Administrator from **Settings > Organization > Contacts and Groups > Alert Subscriptions.**

Record Information

The **Record Information** section shows the following display-only fields:

- **Created date**
- **Created by**
- **Last updated date**
- **Last updated by**
- **Registration success date**

Group Associations

The **Group Associations** section displays the group names to which the contact belongs, or “No groups found”.

Manually Adding an Individual Contact

Perform the following procedure to add contacts individually.

To add a new Contact individually:

1. From the **Contacts** subtab, click **Add Contact**.
2. Under **General Information**, fill in the fields.
    a. **External IDs** can include email addresses, telephone numbers, login IDs, employee IDs, or other unique items within your Organization. Be consistent when choosing the External IDs, as they must be a unique identifier for each Contact.
    b. **SSO User ID**—If you have Single Sign-On functionality enabled for your Organization and want to allow your contacts to log in to the Member Portal by using their SSO credentials, enter the customer-defined SSO User ID. Ask your Organization's IT team for each contact's Single Sign-On user ID.
    c. Under **Groups**, click **Manage Groups** to add the contact to groups in your Organization.

    > **NOTE:** You can add all groups except Sequenced Groups.

3. Under **Delivery Methods**, define the contact information for the devices.
    a. **Add a delivery method**—Select a delivery method from the menu. You can configure the delivery methods enabled for your Organization, but you do not have to define the contact information for every delivery method.
        - If the Delivery Method Order is **Contact Preferred**, the priority of the devices will be in the order in which they are added or populated in the profile.
        - As a best practice, use the following order of delivery methods for the contacts to receive the notifications soonest:
            - Mobile App
            - SMS
            - Email
            - Cell Phone
            - Landline

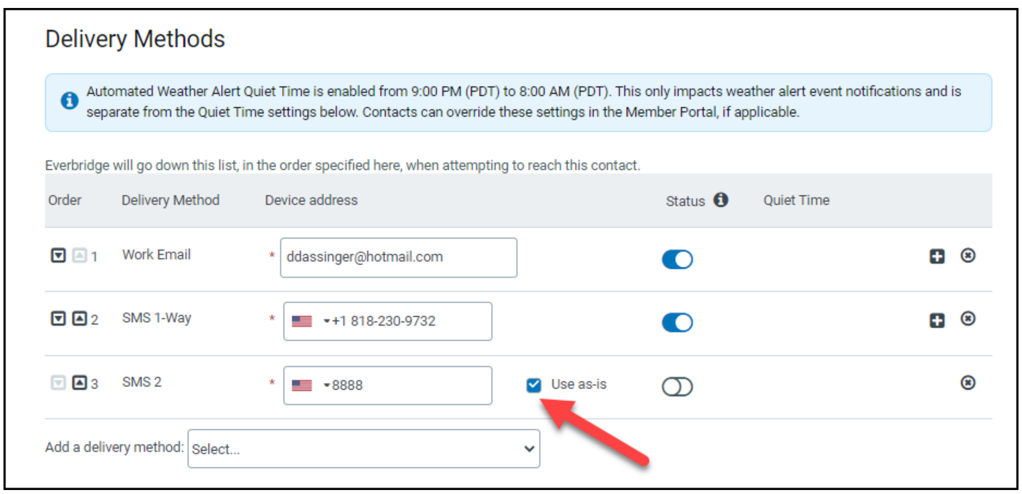
> **NOTE:** The Everbridge Mobile App must be downloaded, and then it is automatically added to the list.

b. **Device address**—Type the device value depending on the delivery method you chose. For a Phone Number, select the country from the Flag drop-down list, if needed. Then type only the phone number digits (4-20 digits).

   The **Use as-is** check box displays when there is a phone validation error. The **Use as-is** check box only displays for the following phone number types:

   - Extension Phone
   - Phone
   - SMS
   - TTY
   - Fax
   - Numeric Pager
   - TAP Pager
   - One-Way SMS

     To bypass the phone validation, select the **Use as-is** check box. Enter 4-20 digits.



c. **PIN**—If a Pager, type the PIN.

d. **Advanced**—Click the Advanced link to see the Pager Service field. Select your pager company from the Pager Service drop-down list. This field is displayed for the following delivery methods: Numeric Pager and Plain Text Email - 1 Way. If you select a Pager Service, then Everbridge sends your messages to the pager company using the Wireless Communication Transfer Protocol (WCTP). If you do not select a Pager Service, then your message is sent to your pager company using the telephone modem (Numeric Pager) or email server (text pagers).

   e. If selected in Settings, in the Status column, ON enables you to turn off the delivery method so that it does not receive any notifications and you can specify quiet periods. Then, also select the blue + icon to set up the quiet time of the delivery method. (If the contact's time zone has not been set, select the time zone from the **Set Up Contact's Time Zone** dialog. When you click **OK**, you can set the quiet time.) From the **Quiet Time - [Delivery Method]** dialog, give the Quiet Time a name, select the days and time range (or click the 24 Hours check box). Click **OK**. The Quiet Time name appears alongside the delivery method.
   f. Repeat steps 3a through 3e for every delivery method you want attempted for this contact.
   g. Prioritize the delivery methods by using the Up and Down arrows on the right-hand side of the panel.
4. Under **Static Location(s),** click the link: **New Static Location** and fill in the fields.
   a. The system begins geocoding the address. The **Select Geo Address** field allows you to select from a list of locations to which the address matches. If further refinement is needed, add the **Postal Code**.
      - **Postal Code**—Type the postal code of the address.
         - In the United States, type the 5-digit postal code.
         - In Great Britain, type the post code (between 5 and 7 alphanumeric characters with a space before the last 3 alphanumeric characters).
      - **Location Suggestion**—Select the address from the drop-down list that matches your address. Once a geocoded address is selected, the Latitude/Longitude information is populated into the corresponding fields. Everbridge supports Decimal Degrees (DD) instead of Degrees/Minutes/Seconds (DMS) when inserting latitude/longitude values for Contact and Building/Asset records.
5. Under **Travel Arranger**, add an existing contact as the travel arranger if needed.
6. Under **Additional Information**, define the desired information for the contact.
   a. **Additional Information**—Select the desired information from the drop-down list.
   b. Depending on the format, enter the possible value or values.
      - A multi-select list allows you to select from a list of values and click the Right arrow (>).
      - A single-select box allows you to select the value.
      - A text box allows you to type free-form text. If a Date, use yyyy-mm-dd format.

   c. Optionally, remove additional information by selecting the Trash Bin on the right-hand side of its row.
7. Under **Alert Subscriptions**, view and modify the contact's subscriptions by clicking **Manage Subscriptions**. The **Edit Subscription** dialog appears.
   a. Select the check box for the desired category. This exposes all the alerts in that category. Alternatively, you can select the Right arrow to display the alerts.
   b. Scroll as needed to see the entire list.
   c. Clear check boxes for the alerts that the contact should not have. Or, if you chose the Right arrow to display the alerts, select the check boxes you want the contact to have.
   d. Click **Save**.
8. Click **Save**. The Alert Subscriptions pane shows the number of subscriptions.

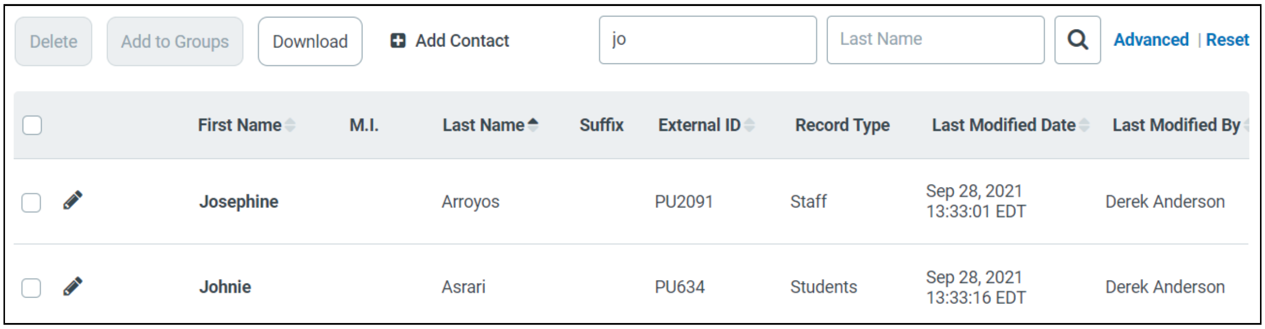
Geocoding

Review the following about geocoding.

- You can geocode any location, domestic or international.
- You can define up to five addresses for any given contact in the system (such as a place of business, point of interest, home location, spouse's work address, children's schools, and so forth). Do this by clicking **Add Another Address**.
- The geocoding process supports foreign language characters, making geocoding global locations quick to locate.
- Each location that is defined for the contact displays on the Universe view.
- When you enter an address, it could be geocoded. That is, the latitude and longitude of the address are verified to be a location on earth. If you enter your own latitude and longitude, the geocoding is not verified.
- Assuming the contact records pass the most critical validation tests, all records are immediately loaded in the database as the file is processed. This ensures the contacts are available for a notification even though the upload is waiting for the **Geocoding** results to return. While waiting, any address submitted without a Latitude and Longitude will not have its pair of values in the database record and will not be available for selection on the map; however, the address record is available for filtering with a Rule or Advanced Search feature from the Notification workflow.
- Everbridge Suite attempts to geocode any address submitted via the CSV file if the Latitude X and Longitude X fields are empty in the file - even if the address was submitted in a previous file and geocoded in a previous upload. Suppose your first upload file includes 8,000 addresses and all the addresses in that CSV file get geocoded. If you upload a subsequent file with 8,001 addresses, where only one address is new but no Latitude/Longitude is provided in the file for any address, then Everbridge Suite attempts to geocode all the addresses again (not just the new address).

Searching for Contacts

From the **Contacts** tab, in the Search field, you can find a contact by First Name, Last Name, or both. Narrow your search by typing more characters in the Search fields.



For example, in the First Name field, typing **Jo** finds contacts with the first names of Josephine and Johnnie. If you search First Name only, the matches are sorted by first name; if you search Last Name only, the matches are sorted by last name; if you search both First Name and Last Name, matches are sorted by last name. To clear the **Search** field, click **Reset**.

Advanced Search

Using Advanced Search, You can filter your search using the following fields:

CATEGORY	Field
CONTACT DETAILS	
	Linked User
	Calendar
	Secure Messaging User
	Contact External ID
	Contact First Name
	Contact Middle Initial
	Contact Last Name
	Contact Suffix
	Contact County
	Delivery Method Value
	Delivery method Value
	Created On
	Last Modified By

	Last Modified On
	Record Type
	Registered
	Registered Email
	Registered On
	Associated Group(s)
	DeliveryMethod-Pager Service
LOCATION DETAILS	
	Contact is Geocoded
	Geocode Source
	Location Name
	Location Street Address
	Location Apt/Suite/Unit
	Location City
	Location State/Province
	Location Country
	Location Postal Code
	Location Latitude
	Location Longitude
	Building Name
	Floor Number
DYNAMIC LOCATION	
	Last Known - Building Name
	Last Known - Floor Number
	Expected Location - Building Name
	Expected Location - State / Province
	Expected Location - Country
	Expected Location - City
	Expected Location - Airport / Railway Station
	Expected Location - Location Name
ADDITIONAL INFORMATION (Examples only.)	
	Hire Date
	Company

	Department
	Street Name
	Building Number
	Role
	Badge ID
SUBSCRIPTIONS (Examples only.)	
	(Weather Alerts)
	Keywords (Alerts)
	Santa Clarita Parks (Events)
	Meetings(Events)
	Events(Events)
	Thunder(Thunder Events)

Examples of Advanced Search and Rules filters

The following are examples of when you can use **Advanced Search** or **Rules** to filter your search:

- You want to reach out to contacts to ask them to enter a location, so you can send them Notifications. You will input two filters:
  - Field: **Location Latitude**
  - Condition: **is empty**
  - Field: **Location Longitude**
  - Value: **is empty**
- You want to see if your contacts have a third email address, you will input two filters:
  - Field: **Delivery Method**
  - Condition: **contains**
  - Value: **Email Address**
  - Field: **Delivery Method Value**
  - Condition: **is equal to**
  - Value: **Email Address 3** (this value is case-sensitive, matching the CSV header)
- Similarly, if you want to see if your contacts have a fifth SMS phone number, input two filters:
  - Field: **Delivery Method**
  - Condition: **contains**
  - Value: **SMS**
  - Field: **Delivery Method Value**
  - Condition: **is equal to**

    - Value: **SMS 5** (this value is case-sensitive, matching the CSV header)
- Before you delete Record Type A and Record Type B from your database, you need to know if you have any contact records that are in Record Type A or Record Type B.
    - Field: **Record Type**
    - Condition: **contains**
    - Value: Select **Record Type A,** scroll, and while holding down CTRL, select **Record Type B**
- Before you generate the next feed from your HR system, you need to find all contact records that do not have a Group.
    - Field: **Associated Group(s)**
    - Value: <Clear all check boxes>
- You want to view the Contact list for contacts created within a specific Date and Time range.
    - Field: **Created On**
    - Value: **Is between**
- You need to send an operational alert to employees based in Country A and Country B.
    - Field: **Contact Country**
    - Condition: **contains**
    - Value: Select **Country A**, scroll, and while holding down CTRL, select **Country B**
- Before you refresh your Point Address data, you need to know if any contact Locations do not have a geocoding source.
    - Field: **Geocode Source**
    - Condition: **does not contain**
    - Value: Select "**A**", scroll, and while holding down SHIFT, select **the last value in the list**
- You are refreshing your contact locations, and you need to know if any contact locations were manually geocoded or if any contact locations contained a geo-point in the CSV upload file.
    - Field: **Geocode Source**
    - Condition: **contains**
    - Value: Select **CSV Upload**, scroll, and while holding down CTRL, select **Manual Edit**
- A recent Notification was sent using the map, but several contacts were not included because they did not have a geocoded location.
    - Field: **Contact is Geocoded**
    - Condition: **false**
- A river is expected to rise above its flood stage, and you need to send a Notification immediately to all residents who have a geocoded location north of Latitude 34.00.
    - Field: **Contact Location Latitude**
    - Condition: **is greater than**

    - Value: 34.00
- Before you use a rule in a Notification, you first need to determine if any contact is missing a value in your custom field, “Job Title”.
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **is not equal to**
    - Value: “**Job Title**”
- You need to send a Notification to anyone whose job title contains “Manager”, “MGR”, or “Mgr”.
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: Manager
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: MGR
    - Field: under **ADDITIONAL INFORMATION**, “**Role**” (the custom name)
    - Condition: **contains**
    - Value: Mgr

You can search contact records from various Everbridge Suite pages:

- **Contacts**—**Advanced**
- **Contacts**—**Rules**
- **Contacts**—From **Contacts**, select **Scheduling** > **Staff Schedules** > **Advanced**

Using a Filter

To use one filter:

1. From the **Contacts** tab, click **Advanced**. The Contact information fields are available, including **Contact Details**, **Location Details**, **Dynamic Locations**, **Additional Information**, and **Subscriptions**.
2. Select a field from the drop-down list on which to search. The list displays the contact fields. The fields include ones for contact management, such as whether a contact’s address is geocoded.
3. Select the condition on which you want to search. The conditions depend on the type of data in the field. For example, a Name field is a text field. A text-formatted field may have different conditions than a date-formatted field.
4. Type the value in the correct format for the data type.
    a. A Date data type must be in YYYY-MM-DD format. This field offers a Calendar icon, from which you can select the desired date. The String data type can be any alphanumeric characters, and the Number data type can be numeric characters.
    b. If the field type offers a single-select list, choose one value. If the field type offers a multi-select list, choose one or more values by selecting the first value, then pressing and holding down CTRL while selecting the other values.

   c. To select a range of values, select the first value, then press SHIFT while selecting the last value in the range.
5. Click **Search**. Your list is filtered to show only contacts from your Advanced Search.

Example Using One Filter

To see all your contacts assigned to a specific group, and then download that list, use one filter.

1. From the **Contacts** tab, click **Advanced**. The **Advanced Search** pane appears.
2. From the **Condition** menu, select the desired field for the filter. In this example, Associated Group(s) is selected.
3. Locate and select the value you want to query and click **Search**. In the Value field, in this example, the application displays the list of contact records assigned to the selected group from which to choose.
4. Click **Download** to download the contact records for all the members in the group to a Microsoft Excel spreadsheet. Or, select the checkboxes of the individual contact records, then click **Download**. You can also view or edit an individual contact record.

Using Multiple Fields and Conditions in a Filter

You can use multiple fields and conditions to locate your specific contacts. Suppose you wanted to find the Fire Wardens in Building 1.

To use multiple fields and conditions in a filter:

1. Using the example, locate the Fire Wardens. Follow the procedure *To use one filter* to select the field (Certifications) and condition (is equal to) with the value (Fire Warden).
2. Click **Add Filter Search**.
3. Locate the contacts who are in Building 1. Follow the procedure *To use one filter* to select the field (Location Building) and condition (is equal to) with the value (Building 1).
4. Click **Search**. When you use more than one filter, all conditions must be true. In this example, the contact must both be certified as a Fire Warden and have an office in Building 1.
5. On the **Contacts** tab, after you have configured a search matching your selected criteria, you can save the filters as a rule. Do this by selecting the check box: **Save as rule**. You can use the rule to locate contacts for a Notification. See Create Groups and Create Rules for more information.

Contact Upload Considerations

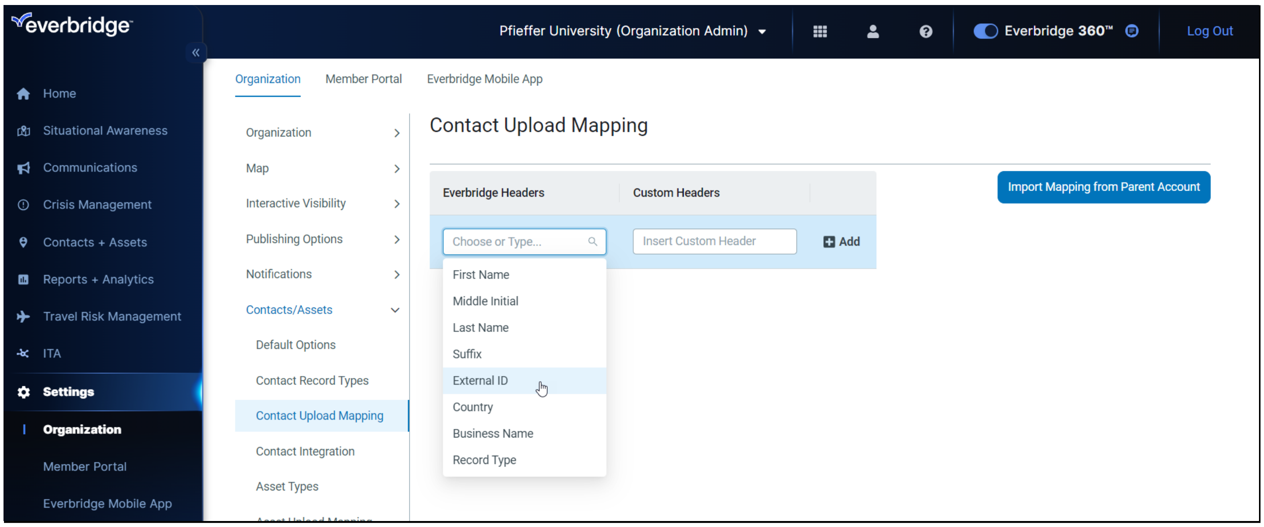
The following are Contact Upload considerations:

1. CSV-formatted files containing contact information can be uploaded from the Account or the Organization.
2. The following columns cannot be empty for any contact record:
   a. **First Name**
   b. **Last Name**
   c. **Record Type** - Ensure you define the record types in the Organization Settings before you upload the first file.
   d. **External ID** - Keep your External ID formats uniform and consistent.
3. If you use a tool to edit the CSV file, then that tool might have its own limitations for the number of characters you can enter in one cell (for example, the maximum characters per cell when using Microsoft Excel is 32,767 characters); however, if you use a text editor to edit the CSV file, then there are no limitations. Also, regardless of the number of digits displayed, Microsoft Excel stores numbers with up to 15 digits of precision. If a number contains more than 15 significant digits, Microsoft Excel converts the extra digits to zeros (0).
4. Leaving a column empty for a record produces different results than when you omit the column from the CSV file; see the details for the desired column in the Contact Upload Data Table.
5. The upload process will still continue even when there are line breaks between contact records in the data file.
6. Some information for a contact requires a value in more than one column:
   a. **Contact Location**: Each location consists of a location name, a complete street address, and, optionally, a Latitude/Longitude pair.
   b. **Custom Fields**: Custom information you add or update for a contact requires the Custom Field name and the custom value pair. (Ensure you define the **Additional Information** fields in **Settings > Organization > Contacts and Groups** before you upload the first file.)
7. If you are automating uploads and have a Member Portal, Everbridge recommends that you not allow the External ID to be edited. For example, if the contact changes a required field, then when you update your contacts (via
8. Phone Numbers (Extension Phone, Phone, FAX, SMS, TTY):
   a. If the country for the delivery method is in the list of NANP (North American Numbering Plan) countries, then the phone number:
      i. Must be 10 digits
      ii. Cannot start with 911, 976, 411, 011, 900, 611, 000

   b. Everbridge runs a validation on all phone numbers, NANP and non-NANP. Everbridge Suite stores phone numbers without a mask or delimiters. If a phone number in the CSV file contains delimiters (for example: nnn-nnn-nnnn or (nnn)nnn-nnnn) then:
      i. International phone numbers must be entered as though they will be dialed from outside of the Organization's or Contact's designated country. Any special handling is included by Everbridge, depending on the call origination site. NOTE: This applies only to the phone number itself, not to the country code.
         (1) For example, when dialing a mobile phone in Mexico, a "1" needs to be entered before the phone number. That "1" must be included for mobile numbers for the system to reach them. Landlines do not need the "1."
      ii. Everbridge Suite displays NANP phone numbers in the user interface using the format xxx-xxx-xxxx; phone numbers for non-NANP countries are displayed without a format.
      iii. The phone number is returned without delimiters when you download the contact record or retrieve the contact record using the API.
      iv. Everbridge Suite removes the delimiters and stores the digits.
9. Everbridge recommends you do not allow contacts in your Member Portal to edit the required fields (see considerations 3a-3d above). For example, if the contact changes a required field, then when you update your contacts (via SFTP, manual upload, or API), a new record would likely be created if one of the required fields is different when uploaded since the update would not see someone with the same fields to update, and would then assume this is a new contact record to add. Then, because of the new record, the system would not update the intended contact and there would be two records that are out of sync (and continue to be out of sync without manual intervention). Likewise, if using a Delete or Replace file, because the system is looking at the four required fields that do not match the update, the contacts would not match and therefore not be deleted or replaced.

Contact Upload Summary

The Contact Upload Data Table provides details about the column headings, from left to right, of the Contact Template (a CSV file). The column headings must not be changed. If you use your own spreadsheet, ensure your column headings have the exact spelling and spaces. Administrators can streamline this process by going to **Organization Settings** > **Contacts and Groups** > **Contact Upload Mapping** and mapping their own custom headers to standard Everbridge headers.



For some of the sections of the file, the template provides multiple copies of the data columns, like when the template provides for multiple locations. If your Organization only needs two locations, you can delete the extra Location columns to simplify your data file. You can also remove columns from other areas such as delivery methods and custom fields.

NOTE: Update adds new contacts if the External ID does not already exist. If the External ID already exists, the contact is updated with the new contact attributes. **Replace** overwrites the existing contact list with only those contacts that match the External ID in the CSV data file. It adds new contact records if the External ID is in the CSV file but not in the database.

CAUTION: Using **Replace** deletes contact records if the External ID exists in the database, but not in the CSV file.

If you are updating data for a contact, it is not necessary to use all of the columns. If a column is not in the file, the values for those fields are not updated and remain unchanged.

To remove a value from a contact during an update, include the column in the upload file, but leave the cell empty. For example, to remove a delivery method for a contact, leave the column headers in the CSV file, but delete the device information from the cells.

The last two columns in the Contact Upload Data Table table explain what happens when you make changes to the CSV file. There are four scenarios:

- UPDATE results when changing an existing value to a new value.
- UPDATE results when leaving cells empty that were previously filled in.
- REPLACE results when changing an existing value to a new value.
- REPLACE results when leaving cells empty that were previously filled in.

NOTE: In **Settings > Contacts and Groups > Additional Settings**, if you use the **Date** data type, its format is: **YYYY-MM-DD**. In the respective **Custom Value** field, in the **Format Cells** dialog of Excel, you must modify the **Date** format. Select the values in the cells, then select the **Date** menu to choose **More Number Formats**. Select **Locale (Location): English (U.K.)** and **Type**: **2001-03-14** each time you use the data file, as the CSV file does not save format changes. Otherwise, you will always get the following error: **Additional information/attribute value is invalid**.

Geocoding

When a contact upload includes a latitude and longitude, those coordinates will be retained in the contact record and are visible in the Universe tab. Once the geocoding process has been completed, the coordinates are modified on the contact's record with the geocoded value.

Contact Upload Data Table

Make sure to review the Contact Upload Considerations.

Column Heading	Data Type	Comments	UPDATE Results	REPLACE Results
Organization Name	String	• If you try to upload a file with this column, then the application will display an error message in the Upload Details, although it will not stop the upload. The column will be ignored. • Maximum characters: 40.	Field Not Empty: Adds the contact to the Organization if the contact record does not already exist in the Organization. Field Empty: Cannot be empty if upload is performed from the Account. Column Not in File: This is a required field for Account Administrators. The file will not be processed.	Field Not Empty: Moves the contact to the designated Organization if the contact does not already exist in the Organization. Field Empty: Cannot be empty if upload is performed from the Account. Column Not in File: This is a required field for Account Administrators. The file will not be processed.
First Name	String	• Required • Maximum characters: 40.	Field Not Empty: Replaces the existing value Field Empty: This is a required field. The record is not processed.	Field Not Empty: Replaces the existing value Field Empty: This is a required field. The record is not processed.

			Column Not in File: This is a required field. The file will not be processed.	Column Not in File: This is a required field. The file will not be processed.
Middle Initial	String	• Maximum characters: 1.	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Middle Initial is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Last Name	String	• Required • Maximum characters: 40.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will not be processed.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will not be processed.
Suffix	String	• Maximum characters: 10.	Field Not Empty: Replaces	Field Not Empty: Replaces

			the existing value <u>Field Empty:</u> No change to value in database <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.	the existing value <u>Field Empty:</u> The Suffix is removed <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.
External ID	String	• <u>Required</u> • Maximum characters: 50. • Unique identifier for the contact record. • Must be unique in the Organization. • The External ID is case-sensitive. • If the External ID does not exist in the database, then the application adds the record. If the External ID exists, then the application updates the existing record. • If more than one record in your file has the same External ID, then the subsequent records will be used to update the content of the first record loaded.	<u>Field Not Empty:</u> Adds the contact to the Organization or updates the record. <u>Field Empty:</u> This is a required field. The record is not processed. <u>Column Not in File:</u> This is a required field. The file will not be processed.	<u>Field Not Empty:</u> Adds the contact to the Organization if the External ID does not exist in the database; otherwise, updates the contact record using the information in the file. <u>Field Empty:</u> This is a required field. The record is not processed. <u>Column Not in File:</u> This is a required field. The file will not be processed.

Country	String	• Numeric Country Code, ISO 2-character alpha country code from ISO-3166-1, or the full country name as it appears in any Country field of Everbridge Suite. Must be the Numeric Country Code, ISO Alpha-2 (such as "US") or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES"). • This is the primary country for the contact.	Field Not Empty: Replaces the existing value. Field Empty: No change to value if value exists in database; set to Organization country if contact is added and field is empty Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Business Name	String	• Maximum characters: 100. **NOTE:** Leave this column empty. It is not used in Everbridge Suite.	Field Not Empty: No change to value in database. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing	Field Not Empty: No change to value in database. Field Empty: The Business Name is removed. Column Not in File: This field is not required. The file will be processed and any existing

			value will be retained.	value will be retained.
Record Type	String	• Required • Must exist in the **Organization Settings** page. **NOTE:** Set up your Record Types before uploading contact data.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will not be processed.	Field Not Empty: Replaces the existing value. Field Empty: This is a required field. The record is not processed. Column Not in File: This is a required field. The file will not be processed.

Time Zone	String	Optionally, type a value below:
		`Pacific/Niue`
		`Pacific/Pago_Pago`
		`Pacific/Honolulu`
		`Pacific/Johnston`
		`Pacific/Rarotonga`
		`Pacific/Tahiti`
		`Pacific/Marquesas`
		`America/Anchorage`
		`Pacific/Gambier`
		`America/Los_Angeles`
		`America/Tijuana`
		`America/Vancouver`
		`America/Whitehorse`
		`Pacific/Pitcairn`
		`America/Dawson_Creek`
		`America/Denver`
		`America/Edmonton`
		`America/Hermosillo`
		`America/Mazatlan`
		`America/Phoenix`
		`America/Yellowknife`
		`America/Belize`
			Field Not Empty: Replaces the existing value.
			Field Empty: No change to value in database.
			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
				Field Not Empty: Replaces the existing value.
				Field Empty: No change to value in database.
				Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

		`America/Chicago`
		`America/Costa_Rica`
		`America/El_Salvador`
		`America/Guatemala`
		`America/Managua`
		`America/Mexico_City`		

		America/Regina America/Tegucigalpa America/Winnipeg Pacific/Easter Pacific/Galapagos America/Bogota America/Cayman America/Grand_Turk America/Guayaquil America/Havana America/Iqaluit America/Jamaica America/Lima America/Montreal America/Nassau America/New_York America/Panama		
		America/Port-au-Prince America/Toronto America/Caracas America/Anguilla America/Antigua America/Aruba America/Asuncion America/Barbados America/Boa_Vista America/Campo_Grande America/Cuiaba America/Curacao America/Dominica America/Grenada America/Guadeloupe America/Guyana America/Halifax America/La_Paz America/Manaus America/Martinique America/Montserrat America/Port_of_Spain America/Porto_Velho America/Puerto_Rico		
		America/Rio_Branco America/Santiago America/Santo_Domingo America/St_Kitts America/St_Lucia America/St_Thomas America/St_Vincent America/Thule America/Tortola Antarctica/Palmer Atlantic/Bermuda America/St_Johns		

		America/Araguaina America/Argentina/Buenos_Aires America/Bahia America/Belem America/Cayenne America/Fortaleza America/Nuuk America/Maceio America/Miquelon America/Montevideo America/Paramaribo America/Recife		
		America/Sao_Paulo Antarctica/Rothera Atlantic/Stanley America/Noronha Atlantic/South_Georgia America/Scoresbysund Atlantic/Azores Atlantic/Cape_Verde Africa/Abidjan Africa/Accra Africa/Bamako Africa/Banjul Africa/Bissau Africa/Casablanca Africa/Conakry Africa/Dakar Africa/El_Aaiun Africa/Freetown Africa/Lome Africa/Monrovia Africa/Nouakchott Africa/Ouagadougou Africa/Sao_Tome America/Danmarkshavn Atlantic/Canary		
		Atlantic/Faroe Atlantic/Reykjavik Atlantic/St_Helena Etc/GMT Europe/Dublin Europe/Lisbon Europe/London Africa/Algiers Africa/Bangui Africa/Brazzaville Africa/Ceuta Africa/Douala Africa/Kinshasa Africa/Lagos Africa/Libreville Africa/Luanda		

		Africa/Malabo Africa/Ndjamena Africa/Niamey Africa/Porto-Novo Africa/Tunis Africa/Windhoek		
		Europe/Amsterdam Europe/Andorra Europe/Belgrade Europe/Berlin Europe/Brussels Europe/Budapest Europe/Copenhagen Europe/Gibraltar Europe/Luxembourg Europe/Madrid Europe/Malta Europe/Monaco Europe/Oslo Europe/Paris Europe/Prague Europe/Rome Europe/Stockholm Europe/Tirane Europe/Vaduz Europe/Vienna Europe/Warsaw Europe/Zurich Africa/Blantyre		
		Africa/Bujumbura Africa/Cairo Africa/Gaborone Africa/Harare Africa/Johannesburg Africa/Kigali Africa/Lubumbashi Africa/Lusaka Africa/Maputo Africa/Maseru Africa/Mbabane Africa/Tripoli Asia/Amman Asia/Beirut Asia/Damascus Asia/Gaza Asia/Jerusalem Asia/Nicosia Europe/Athens Europe/Bucharest Europe/Chisinau Europe/Helsinki Europe/Istanbul Europe/Kiev		

		Europe/Riga		
		Europe/Sofia Europe/Tallinn Europe/Vilnius Africa/Addis_Ababa Africa/Asmara Africa/Dar_es_Salaam Africa/Djibouti Africa/Kampala Africa/Khartoum Africa/Mogadishu Africa/Nairobi Antarctica/Syowa Asia/Aden Asia/Baghdad Asia/Bahrain Asia/Kuwait Asia/Qatar Asia/Riyadh Europe/Kaliningrad Europe/Minsk Indian/Antananarivo Indian/Comoro		
		Indian/Mayotte Asia/Tehran Asia/Baku Asia/Dubai Asia/Muscat Asia/Tbilisi Asia/Yerevan Europe/Moscow Europe/Samara Indian/Mahe Indian/Mauritius Indian/Reunion Asia/Kabul Antarctica/Mawson Asia/Aqtau Asia/Aqtobe Asia/Ashgabat Asia/Dushanbe Asia/Karachi Asia/Tashkent Indian/Kerguelen Indian/Maldives Asia/Calcutta Asia/Colombo Asia/Katmandu		

		Antarctica/Vostok Asia/Almaty Asia/Bishkek Asia/Dhaka Asia/Thimphu Asia/Yekaterinburg Indian/Chagos Asia/Rangoon Indian/Cocos Antarctica/Davis Asia/Bangkok Asia/Hovd Asia/Jakarta Asia/Omsk Asia/Phnom_Penh Asia/Saigon Asia/Vientiane Indian/Christmas Antarctica/Casey Asia/Brunei Asia/Choibalsan Asia/Hong_Kong Asia/Krasnoyarsk		
		Asia/Kuala_Lumpur Asia/Macau Asia/Makassar Asia/Manila Asia/Shanghai Asia/Singapore Asia/Taipei Asia/Ulaanbaatar Australia/Perth Asia/Dili Asia/Irkutsk Asia/Jayapura Asia/Pyongyang Asia/Seoul Asia/Tokyo Pacific/Palau Australia/Adelaide Australia/Darwin Antarctica/DumontDUrville Asia/Yakutsk Australia/Brisbane Australia/Hobart Australia/Sydney Pacific/Guam		
		Pacific/Port_Moresby Pacific/Saipan Pacific/Truk Asia/Vladivostok Pacific/Efate		

		Pacific/Guadalcanal Pacific/Kosrae Pacific/Noumea Pacific/Ponape Pacific/Norfolk Asia/Kamchatka Asia/Magadan Pacific/Auckland Pacific/Fiji Pacific/Funafuti Pacific/Kwajalein Pacific/Majuro Pacific/Nauru Pacific/Tarawa Pacific/Wake Pacific/Wallis Pacific/Enderbury Pacific/Tongatapu Pacific/Kiritimati		
Groups	String	• Maximum characters: 260 per group name. • The Groups column cannot be repeated. All groups assigned to the contact must be in this cell. You can have an unlimited number of groups. • Can contain one or more group names. Each group name cannot be longer than 260 characters. Separate group names using the pipe (|) character. For example, for contact Bob Smith, if his Groups cell contains **Floor 2 |Nurse**, then Bob Smith becomes a member of these two groups.	Field Not Empty: Adds the contact to the assigned group(s) and removes the contact from existing group(s). For example, Bob Smith is currently a member of the “Floor 2” group. If the CSV cell contains “Nurse”, then Bob will be moved to the “Nurse” group. Place an asterisk (*) and a pipe as the first two characters to add a contact	Field Not Empty: Adds the contact to the assigned group(s) and removes the contact from existing group(s). For example, Bob Smith is currently a member of the “Floor 2” group. If the CSV cell contains “Nurse”, then Bob will be moved to the “Nurse” group. NOTE: The "|" notation is not processed during a REPLACE.

			to a group without removing the contact from existing groups. For example, contact Sue Jones is already a member of the CodeBlue group. Her Groups cell contains the following: ***|Floor 1|ER Doctor**. Sue Jones is now a member of three groups. Field Empty: Removes the contact from all assigned groups if the contact exists in the database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: Removes the contact from all assigned groups if the contact exists in the database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
SSO User ID	String	• If you have Single Sign-On functionality enabled for your Organization and want to allow your contacts to log in to the	Field Not Empty: Replaces the existing value.	Field Not Empty: Replaces the existing value.

		Member Portal by using their SSO credentials, enter the customer-defined SSO User ID.	Field Empty: The SSO User ID is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The SSO User ID is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Travel Arranger	String	• Enter the External IDs of the contacts who are Travel Arrangers for this contact. Separate the External IDs using the pipe (|) character.	Field Not Empty: Replaces the existing value. Field Empty: The Travel Arranger is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Travel Arranger is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Group Remove	String	• When using the **Group Remove** column, make sure you remove the **Groups** column from the CSV file. When updating, existing groups not listed in the Group Remove cell remain unchanged. • To remove a contact from a group, enter the group name. Separate group names using the pipe (|) character. For	Field Not Empty: Removes the contact from the groups. Field Empty: Contact remains in previously assigned groups if the contact exists	Field Not Empty: Removes the contact from the groups. Field Empty: Contact remains in previously assigned groups if the contact exists

		example, to remove a contact from the “Employees” and “Overtime” groups, submit “Employees|Overtime”. • To remove a contact from a group and its subgroups, enter an exclamation point (!) and the group name. Separate group names using the pipe (|) character. For example, to remove a contact from the “Parents” group (and any nested groups, submit **!Parents**. **NOTE:** If a group name begins with an exclamation point (!), such as "**!GroupA**", then you must use two exclamation marks (for example, **!!GroupA**) to remove a contact from the group and nested groups. Otherwise, the application searches for "GroupA" and will not find **!GroupA.**	in the database Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	in the database Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Location #	String	• Add up to 5 locations for a contact. • Maximum characters: 40. • Each location must be unique per contact. For example, a contact cannot have two “Home” locations, but they can	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database if	Field Not Empty: Replaces the existing value Field Empty: No change to value in database if

		have a “Home” and a “Vacation Home”.	contact exists in the database. To remove a Location from a contact, leave the Location # name in this cell, but leave all the other Location information fields empty. For example, to remove the “Home” address, leave “Home” in Location # and ensure all other address fields empty. NOTE: When updating, use the same Location # name to replace the location information. For example, if “Home” is in Location 1, to update the “Home” address, you must specify “Home” as Location 1 and change the corresponding fields to the new address.	contact exists in the database. To remove a Location from a contact, leave the Location # name in this cell, but leave all the other Location information fields empty. For example, to remove the “Home” address, leave “Home” in Location # and ensure all other address fields empty. <u>Column Not in File:</u> This field is not required. The file will be processed and any existing value will be retained.

			If you change the Location # name (for example, from Location 1 to Location 2), the application treats the information as a new address if Location 2 did not previously exist; if Location 2 exists, the Location 2 name is replaced but no changes occur to the address information. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	
Street Address #	String	• Corresponds to Location #. • Maximum characters: 100.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Street Address # is removed.

			Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Apt/Suite/ Unit #	String	• Corresponds to Location #. • Maximum characters: 75.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Apt/Suite/Unit # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
City #	String	• Corresponds to Location #. • Maximum characters: 40.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The City # is removed. Column Not in File: This field is not required. The file will be processed and

			The file will be processed and any existing value will be retained.	any existing value will be retained.
State/ Province #	String	• Corresponds to Location #. • If State (for U.S. only)—Must be ISO-alpha 2 character (such as "NY") or the full name of the state. When full name, use initial capital letters; for example, "New York". The system does not accept lower case values ("ny" or "new york") or upper case names ("NEW YORK"). • If Province—Enter the actual Province name/ label as the value. Province cannot be a numeric value • Maximum characters: 40.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The State/Province # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Postal Code #	String	• Corresponds to Location #. • Maximum characters: 10. • If Country *X* is "United States" or "US", then valid formats are: 99999; 99999-9999; 999999999 • If Country *X* is not "United States" or "US", then the value can be any format.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Postal Code # is removed. Column Not in File: This field is not required. The file will be processed and any existing

			value will be retained.	value will be retained.
Country #	String	• Corresponds to Location #. • ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be ISO 2-character alpha (such as "US") or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Latitude #	Decimal	• Corresponds to Location #. • Only Decimal Degrees are supported. • Minimum value: -90.0. • Maximum value: 90.0. • If no latitude/longitude is entered, then the system automatically attempts to geocode the address • If you provide the latitude/longitude in the data file, then the system verifies the value is between the minimum and maximum values list above, but does not verify that they are correct coordinates for the address.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Latitude # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

Longitude #	Decimal	• Corresponds to Location #. • Only Decimal Degrees are supported. • Minimum value: -180.0. • Maximum value: 180.0. • If no latitude/longitude is entered, then the system automatically attempts to geocode the address. • If you provide the latitude/longitude in the data file, then the system verifies that they are valid values, but does not verify that they are correct coordinates for the address.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Longitude # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Location ID #	String	• Client-defined unique identifier for the location record. • Maximum Length: 50. • Value must be unique in file. • This field is used to add a Static location for contacts and associate those contacts with an existing building. If you also use the Location ID field in the Assets upload, then the Location ID should match the Location ID field in the Contacts upload.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Location # name. Field Empty: The Location ID # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Extension Phone #	String	• Ideal for phone numbers that require an extension or for phone systems	Field Not Empty: Replaces the existing	Field Not Empty: Replaces the existing

		that use an automated attendant menu. • Add up to 5 Extension Phone paths for a contact. • See the *Considerations* section earlier in this document.	value for the same Extension Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	value for the same Extension Phone #. Field Empty: The Extension Phone # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Extension #	String	• Corresponds to phone number in Extension Phone #. • Maximum value: 10 digits. • No asterisks or pound/ hash (#) symbol. • Commas are accepted in the upload, as well as the UI fields for Manager and Member Portals to aid in successful call timing for PBX; each comma represents a 0.5-second delay.	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: The Extension # is removed Column Not in File: This field is not required. The file will be processed and

			delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	any existing value will be retained.
Extension Phone Country #	String	• Corresponds to phone number in Extension Phone #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Extension Phone #. Field Empty: The Extension Phone Country # is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

Phone #	Decimal	• Add up to 6 phone numbers for a contact. • See Contact Upload Considerations.	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: The Phone # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Phone Country #	String	• Corresponds to the phone number in Phone #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example,	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery	Field Not Empty: Replaces the existing value for the same Phone #. Field Empty: The Phone Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing

		"United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	value will be retained.
Email Address #	String	• Add up to 5 email addresses for a contact. • Maximum characters: 80. • Organization (*username@example.com*).	Field Not Empty: Replaces the existing value for the same Email Address #. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same Email Address #. Field Empty: The Email Address # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Plain Text Email - 1-way	String	• Maximum characters: 80. • Recommended path for sending messages to alphanumeric pagers. • Organization (*username@example.com*).	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields	Field Not Empty: Replaces the existing value. Field Empty: The Plain Text Email - 1-way is removed

			are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Plain Text - 1-way Pager Service	String	• Use this option to send messages to pagers using the WCTP communication channel. • Enter a valid pager company name: **American Messaging - MyAirMail, American Messaging - Skytel, USA Mobility, Critical Alert - North East, Critical Alert - South Central, Indiana Paging, or Voalte**. The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed). • Contact American Messaging if you do not know the network for your pagers. **NOTE:** The Pager Service must be in the list of valid Pager Service names. Invalid	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Plain Text 1 1-way Pager Service is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

		Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.		
Plain Text Email - 2-way	String	• Maximum characters: 80.	Field Not Empty: Replaces the existing value. Field Empty: No change to value in database. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Plain Text Email - 2-way is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
SMS #	Number	• Add up to 5 SMS paths for a contact. • For international phone numbers, if a "1" or other digit is required for peer-to-peer messaging prior to the actual phone number, do not include this in the numeric string for SMS.	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: The SMS # is removed. Column Not in File: This field is not required. The file will be processed and any existing

			delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	value will be retained.
SMS # Country	String	• Corresponds to phone number in SMS #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as “US”), or the full name of the country. When full name, use initial capital letters; for example, “United States”. The system does not accept lower case values (“us” or “united states”) or upper case names (“UNITED STATES”).	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same SMS #. Field Empty: The SMS # Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

FAX #	Number	• Add up to 3 FAX phone numbers for a contact.	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: The FAX # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
FAX # Country	String	• Corresponds to phone number in FAX #. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery	Field Not Empty: Replaces the existing value for the same FAX #. Field Empty: The FAX # Country is removed. Column Not in File: This field is not required. The file will be processed and any existing

		system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	value will be retained.
TTY #	Number	• Add up to 3 TTY phone numbers for a contact. • Available only for TTY devices in United States or Canada.	Field Not Empty: Replaces the existing value for the same TTY #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value for the same TTY #. Field Empty: The TTY # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
TTY Country #	String	• Corresponds to phone number in TTY #.	Field Not Empty: Replaces	Field Not Empty: Replaces

		• TTY Country must be "1", "US", "CA", "United States"" or "Canada."	the existing value for the same TTY #. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	the existing value for the same TTY #. Field Empty: The TTY Country # is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Numeric Pager	Number	• Add one phone number per contact.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

			the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	
Numeric Pager Country	String	• Corresponds to phone number in Numeric Pager. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager Country is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Numeric Pager Pin	Number	• Corresponds to phone number in Numeric Pager. • Maximum 10 digits.	Field Not Empty: Replaces the existing value.	Field Not Empty: Replaces the existing value.

			Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The Numeric Pager Pin is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Numeric Pager Service	String	• Enter a valid pager company name: **American Messaging - MyAirMail, American Messaging - Skytel, USA Mobility, Critical Alert - North East, or Critical Alert - South Central.** The pager service name is not case-sensitive, but ensure you type the identical characters (and spaces, if needed). • Contact American Messaging if you do not know the network for your pagers.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field	Field Not Empty: Replaces the existing value. Field Empty: The Numeric Pager Service is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

		NOTE: The Pager Service must be in the list of valid Pager Service names. Invalid Pager Service names are not loaded even though the contact information for the pager is loaded into the contact record. All other validation rules do not change.	is not required. The file will be processed and any existing value will be retained.	
TAP Pager	Number	• Add one phone number per contact. • Phone number is the terminal number.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The TAP Pager is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.

TAP Pager Country	String	• Corresponds to phone number in TAP Pager. • Numeric Country Code, ISO 2-character alpha country code, or full ISO country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The TAP Pager Country is removed. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
TAP Pager Pin	Number	• Corresponds to phone number in TAP Pager. • Maximum 10 digits.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from	Field Not Empty: Replaces the existing value. Field Empty: The TAP Pager Pin is removed. Column Not in File: This field is not required. The file will be processed and any existing

			the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	value will be retained.
One Way SMS	Number	• Use for SMS subscribers who cannot reply to messages. • For international phone numbers, if a "1" or other digit is required for peer-to-peer messaging prior to the actual phone number, do not include this in the numeric string for SMS.	Field Not Empty: Replaces the existing value. Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Not Empty: Replaces the existing value. Field Empty: The One Way SMS is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
One Way SMS Country	String	• Corresponds to phone number in One Way SMS. • Numeric Country Code, ISO 2-character alpha country code, or full ISO	Field Not Empty: Replaces the existing value.	Field Not Empty: Replaces the existing value.

		country name from ISO 3166-1. • Must be the Numeric Country Code, ISO 2-character alpha (such as "US"), or the full name of the country. When full name, use initial capital letters; for example, "United States". The system does not accept lower case values ("us" or "united states") or upper case names ("UNITED STATES").	Field Empty: No change to the contact record unless all related fields are empty in the CSV file, in which case the delivery method is removed from the contact record. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	Field Empty: The One Way SMS Country is removed Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Custom Field #	String	• "Custom Field" and "Custom Value" in the data file are the Additional Information fields that are configured in the Organization Settings page. • Enter the name of the field in "Custom Field #" and the value for the field in "Custom Value #". • Maximum characters: 40. • Must exist in the Organization Settings page. • There are nine Custom Field #/Custom Value # columns in the data file. You can add any number of Custom Field #/ Custom Value # pairs, as	Field Not Empty: If the Field name is changed: A new Additional Information field is added to the contact record containing the same value. No changes occur in the contact record if the Name is not added to the **Additional Information** settings	Field Not Empty: If the field name is changed: A new Additional Information field is added to the contact record containing the same value. No changes occur in the contact record if the Name is not added to the **Additional Information** settings

		needed. For example, if you have 12 Additional Information fields, you can add three new Custom Field #/Custom Value # pairs to the data file.	(**Settings > Organization > Contacts and Groups > Additional Information**). Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	(**Settings > Organization > Contacts and Groups > Additional Information**). Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
Custom Value #	String, Date, or Decimal	• Corresponds to Custom Field #. • Enter the name of the field in “Custom Field #” and the value for the field in “Custom Value #”. • If the value is a multiple selection list and this contact has more than one value, enter the values separated by the pipe (|) character. Do not add any spaces around the pipe character.	Field Not Empty: Replaces the existing value for the same Custom Field #. Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes	Field Not Empty: If the field name is unchanged, but the value is different, then the existing value is replaced. If the field name is changed, then the new field name and its value are

		• Maximum characters: 260.	occur in the contact record. The Custom Value is removed if its related Custom Field is provided. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.	added to the Additional Information section for the contact. Field Empty: If the Custom Field # and corresponding Custom Value # are empty, no changes occur in the contact record. The Custom Value is removed if its related Custom Field is provided. Column Not in File: This field is not required. The file will be processed and any existing value will be retained.
END	String	• Although not required, it is a recommended technique to include “END” at the end of every row is a visual aid for the readers of the file. (In a spreadsheet, it is the last column heading.)	N/A	N/A

Upload and Download Guidelines for Non-English Languages

Everbridge uses **UTF-8 no BOM Encoding for Contact CSV files**. You can continue to use Microsoft Excel, Microsoft Windows Notepad, or any other Microsoft (or third-party) product to save your CSV files as long as you are using the Latin character set (English).

UTF-8 no BOM Encoding

Everbridge uses the most widely used file encoding scheme, known as UTF-8, when uploading/importing and downloading/exporting Organization Contact files in CSV format. Using the UTF-8 encoding scheme allows the inclusion of non-Latin (non-English) characters in the files. This allows customers to input data in their records in its actual format such as kanji, Hangul, the Arabic alphabet, or any other script.

Downloading/Exporting

As noted above, the downloaded CSV file of an Organization's Contacts will be UTF-8 encoded. This file format is supported by all modern operating systems including Windows, Linux, Unix, and Mac; users should have no problem opening the downloaded file with any modern application that can read a text or CSV file such as Excel, Notepad, OpenOffice, Notepad++, and so forth.

Uploading/Importing

Because of these product constraints on UTF-8 encoding, customers should not use Excel or Notepad to save a CSV file if it contains non-Latin characters as part of the Contacts' fields such as the name, address, and so forth.

Because of this limitation, any non-Latin characters in the saved file will be lost (that is, opening the file again will show random characters in place of the non-Latin characters). Notepad, which ships with all Windows versions, has an Encoding option in the **Save As** dialog box, and appears to supports UTF-8.

However, this is a slightly different variation of the commonly used UTF-8, known as UTF-8 with BOM. Because of this variation, uploading a CSV file that is encoded using UTF-8 with BOM will not work: the file upload may succeed, however, the non-Latin characters may not be imported correctly.

Instead, customers should use applications that support the commonly used UTF-8 encoding, also known as "UTF-8 with no BOM", to save their CSV files. Some examples of such applications include Notepad++, OpenOffice (currently supported by Apache), and Google Docs.

Microsoft Excel has an option (**Save Dialog** > **Tools Button** > **Web Options Item** > **Encoding Tab**) that allows setting the file encoding when saving files. However, as of Office 2010, this option has no effect when saving the file as a CSV.

Glossary of Terms

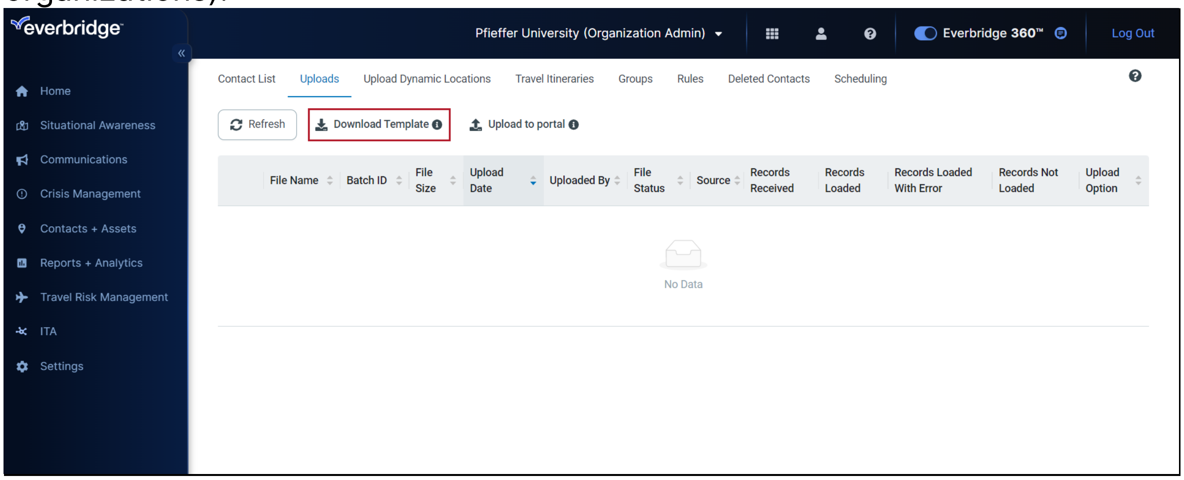
- **ASCII** (American Standard Code for Information Interchange) is a code for representing English characters as numbers, with each letter assigned a number from 0-127.
- **Unicode** is an international encoding standard for use with different languages and scripts, where each letter, digit, or symbol is assigned a unique number ("code points") for every character. This includes characters from nearly all languages, plus many other characters such as mathematical symbols. There are many ways to encode Unicode strings as bytes, such as UTF-8 and UTF-16.
- **UTF-8** (8-bit Unicode Transformation Format) and UTF-16 (16-bit Unicode Transformation Format) are variable-length character encoding for Unicode. UTF-8 uses 1-4 bytes for each value (so, for the first 128 characters, UTF-8 is identical to ASCII) and UTF-16 uses 2 or 4 bytes. UTF-8 was designed for backward compatibility with ASCII and to avoid the complications of endianness (how bytes are ordered within computer memory) and byte order marks (BOMs) in UTF-16 and UTF-32. Again, for every character that has an ASCII value, the Unicode code point and the ASCII value of that character are the same. You should prefer to use Unicode strings rather than ASCII, to allow you to have accented characters and to localize your interface to languages other than English.
- A **Non-ASCII character** is a character that does not match any of the 128 code points in the ASCII character set. Non-ASCII characters include 8-bit characters and multibyte characters.
- A **Multibyte character** is a character that might require from 2-4 bytes of storage. If a language contains more than 256 characters, the code set must contain multibyte characters. With a multibyte code set, an application cannot assume that one character requires only 1-byte of storage.
- **BOM** indicates that the byte order is determined by a byte order mark, if present at the beginning of the data stream (packets of data). For UTF-8, the byte order is not applicable. In general, "UTF-8 no BOM" is the common and expected behavior of a UTF-8 file. Most non-Windows applications refer to

this format as "UTF-8" and save the file without a BOM. Microsoft, however, appends a BOM when saving with UTF-8 encoding, so other Windows applications (like Excel) add BOMs to UTF-8 files by default.

Create the CSV file for Upload

To prepare your CSV data file:

1. Click the **Contacts** tab. Click the **Uploads** subtab if it is present.
2. Click **Download Template**. Depending on your browser, the following message might appear: "What do you want to do with CSVTemplate.csv" (or "account_contactCSV" for Account Administrators to add contacts across organizations).



3. Save the file to your desktop, then open it. The CSV template contains the correct column heading names (as described in Contact Upload Summary).
4. Review the following for a full understanding of the columns in the CSV template:
   a. Contact Upload Summary
   b. Contact Upload Considerations
   c. Contact Upload Data Table
5. Also review the following about the data file:
   a. Make sure that the column heading names are exactly as they appear in the template to avoid errors when you upload the file.
   b. For some of the sections of the file, the template provides multiple copies of the data columns. For example, the template provides for multiple locations. You can safely delete the extra Location fields to simplify your data file. You can also delete columns from other areas such as Delivery Methods and Custom Fields.
   c. If you are updating some of the data for a contact, it is unnecessary to use all of the columns. If a column is not in the file, the values for those fields are not updated. For example, if a contact has completed hazardous materials training, you only need to update his certifications. It is not necessary to include all of the other contact information — those values remain unchanged.

   d. To remove a value from a contact during an update, include the column in the upload file, but leave the value cell empty. For example, to remove a delivery method for the contact, leave the column headers in the file but remove the device address information.
   e. To remove a contact's location by updating, enter the name of the location to remove in the Location Name column, but leave the other cells describing the location empty.
   f. It is a recommended technique to end each row in the file with "END" to clearly mark the end of the contact record.
   g. The required commas are automatically added for you.
6. Review the following regarding the Upload directories and expected behavior:
   a. **Update**—The Update options adds new contact records if the External ID is in the CSV file but not in the database. It updates existing contact records if the External ID exists in the database. This option does not delete any contact records. Therefore, Everbridge recommends you always run combined uploads (Update and Delete) one after the other. If you only run an Update (and forget running the Delete), you could have many new people along with updates to existing employees, but also people who are no longer with the organization. This could become a breach of using personal information if the former employee is still sending data after they should have been deleted.

NOTE: For each data element, make sure to also review the Comments in the Contact Upload Summary.

Data Element Category	Comments
Personal Information	• The External ID is the unique identifier for a contact. When you are updating a file, if the External ID does not exist in the database, it adds a record; if the External ID already exists in the database, it updates that record. • If two records in your file have the same External ID, the record is updated using the data from the later record. For example, if External ID EB-0004 exists for Larry Hansen in row 4 and Larry Hansen in row 7, the data from row 7 is used.
Groups	You can add contacts to groups by uploading the group name with the contact. If the contact lists a group that does not exist, the group is added and the contact is added to it. The Groups column can only hold a simple list

	of group names. That is, you cannot specify the nested structure of groups. To manage the group structure, use the web interface. You cannot delete a group name using a CSV file. To manage the group structure, use the web interface. The Groups column can contain one or more group names. Each group name cannot be longer than 260 characters. Separate group names using the pipe (|) character. Do not add any spaces before and after the pipe character. For example, for contact Sharon Bennett, her Groups cell contains the following: Employees|Parents. Sharon Bennett becomes a member of these two groups. When performing an update, add a contact to a group, but never remove them from existing groups when an asterisk (*) is placed in front of the first pipe. For example, contact Brad Currier is already part of the Hart School District group. His Groups cell contains the following: *|Newhall School District|Saugus School District. Brad Currier is now a member of three groups. The contact is removed from any groups you do not list or if you do not use the asterisk and pipe character as the first characters in the Groups column. To remove a contact from a group, first create a Group Remove column anywhere in the CSV file if you are not using the latest template. (In the latest template, the Group Remove column is next to the Groups column.) To remove a contact from a group, type the group name in the Group Remove column. Also enter the group names in the Groups column that you want to keep. For example, you would do this to remove Brad Currier from the Saugus School District but keep him as a contact in the Newhall School District and Employees groups. When using the Group Remove column, you can remove the Groups column from the CSV file to keep the groups not listed in the Group Remove column. To remove a contact from a group and all its nested groups, in the Group Remove column, enter an exclamation point, the group name, and the pipe character to separate one group from another. For example, to remove Sharon Bennett from the “Employees” group and any nested groups under “Employees”, as well as the

<table>
<tr><td></td><td>“Managers” group and any nested groups under “Managers”, type the following: !Employees|!Managers.

To remove a contact from only the parent group and not its nested groups, in the Groups column, type the subgroup names, each separated by the pipe character. Do not add any spaces before and after the pipe character. Then, in the Group Remove column, type the name of the parent group. For example, to keep the Craig Barrick in the nested Parents subgroup, but remove him from the Employees parent group, type Parents in the Groups column and Employees in the Group Remove column.</td></tr>
<tr><td>Locations</td><td>A contact can have up to five locations, but the location names must be unique for the contact. For example, a contact cannot have two “Home” locations, but can have a “Home” and a “Vacation Home”.
If a contact has an address for a location, but no latitude and longitude, it is automatically geocoded for you. This makes the contact available to you on the map.
If you provide latitude and longitude in the data file, the system verifies that they are valid latitude and longitude values. However, it does not verify that these are the correct coordinates for the address. Therefore, if you supply the coordinates, ensure that they are correct. Everbridge supports Decimal Degrees (DD) instead of Degrees/Minutes/Seconds (DMS) when inserting latitude/longitude values for Contact and Building/Asset records.
To update an address for the location name “Home”, for example, simply change the address information for “Home” in the CSV file and upload the CSV file again.
To replace a Location Name (for example, the value in “Location 1”), modify the CSV file in the following manner:
Overwrite the original location name with the replacement location name. For example, in the Location 1 column, replace “Work” with “NewWork” and add the Suite number and ZIP code.</td></tr>
</table>

	▪ In a different location (for example, in Location 2), type the original Location 1 value, but leave all of its address fields empty. For example, in Location 2, type the value “Work”. Using this example, after you update with your modified CSV file, the Location Name “NewWork” has replaced “Work” in Location 1 and, in Location 2, the Location Name “Work” and its Country value are filled in, although the address fields for “Work” are empty.
Delivery Methods	• The individual delivery methods in the data file are Delivery Method fields that are predefined for your organization. Enter the name of the value under the corresponding Delivery Method in the CSV file. • If you enter a value for a Delivery Method not defined for your organization, nothing occurs during the upload process. Unlike Groups and Custom Fields, you cannot enter multiple values in a single Delivery Method. Only the first value is used.
Custom Fields	• Custom Fields in the data file are Additional Information fields that are predefined for your organization. Enter the name of the field in “Custom Field” and the value of the field in “Custom Value.” • If you do not enter a Custom Field/Custom Value, the Contact Record provides a drop-down list of Additional Information, from which you can manually select one or more from the predefined information fields. • If the field is a multiple selection list and this contact has more than one value, enter the values in a string separated by the pipe (|) character. Do not add any spaces before and after the pipe character. For example, to list "Fire Warden and CPR-First Aid", in the Custom Value field, type the following: "Fire Warden|CRP-First Aid". • The CSV file includes nine pairs of Custom Field/ Custom Value fields. If you need more, add them to your CSV file. You can have an unlimited number of Custom Field/Custom Value pairs.

- **Replace**—For the most part (depending on the data element category), the Replace option replaces all contact records for your organization with the records in the CSV file that match the Record Type and External ID in the database. It adds new contact records if the External ID is in the CSV file but not in the database.

> **CAUTION:** Using the Replace option deletes contact records if the External ID exists in the database, but not in the CSV file.

- **Restore** (obtain CSV file from Deleted Contacts page)—Select this option to restore previously deleted contact records that are listed on the Deleted Contacts page. Restore overwrites existing contact records that have the same External ID. (Refer to Deleting or Restoring Contacts for details about restoring Deleted Contacts via a CSV file.)
- **Delete**—The Delete option deletes the contact records from the Organization that match the External IDs in the CSV file. Everbridge recommends you always run combined uploads (Update and Delete) one after the other. If you only run an Update (and forget running the Delete), you could have many new people along with updates to existing employees, but also people who are no longer with the Organization. This could become a breach of using personal information if the former employee is still sending data after they should have been deleted.

9. Fill in the template with your Organization’s contacts and their corresponding fields.
10. From the CSV template, save the file with a new name (that is, use your software's Save-As function).

Choose File Upload Process

Everbridge Suite supports the ability to upload data to the system using the web-based interface (manually) or through Secure FTP (FTP with SSL connectivity via a CSV, Comma-Separated Value, file). In either case, you need to prepare a CSV file. (For information about uploading contacts through Secure FTP, see also Uploading a Contact Data File Via Secure FTP.)

Benefits of uploading include:

- Fast record upload processing.
- Bulk record geocoding based on address information (global geocoding capability).
- Upload error reporting within the upload section ("loaded without errors", "loaded with errors", "not loaded - critical").
- File upload status emails:
    - Received Contact Data File email (automatically sent to the Administrator’s email account).
    - Processed Contact Data File email (automatically sent to the Administrator’s email account).

In many Organizations, the file is generated by the HR (Human Resources) system or other system of record. You then upload the file to Everbridge Suite after reviewing and editing the file. You can also add a file directly. The data file you upload contains all the personal and contact information you would enter on-screen for an individual contact: **General Information**, **Address Information**, **Delivery Methods**, and **Additional Information**.

No matter whether the file is uploaded automatically or uploaded manually, the fields in the file must use the correct format for the data. You can download the template directly from the **Contacts** tab.

The file you upload must be a CSV (Comma-Separated Value) file. In a CSV file, the data fields are separated by commas. The first row of the file contains the names of the data fields. You must make sure that there are no extra characters in any line or lines in the file.

```
First Name,Middle Initial,Last Name,Suffix,External ID,Country,Business Name,
Joe,C,Oliver,,EB-0002,United States,,Employee,Work,2 Journal Square Plaza,,
Juan,,Gonzales,,EB-0003,United States,,Employee,Work,2 Journal Square Plaza,
Mary,M,Briggs,,EB-0006,United States,,Employee,Work,14 Wall St,,New York
Nancy,,Cook,,EB-0007,United States,,Employee,Work,14 Wall St,,New York,N
```

NOTE: If you need to add commas to a phone extension, enclose the Extension Phone field with quotes. For example, ",,,9732" is one field with the value ,,,9732. Without quotes, it is four fields where the first three fields are empty and the fourth field is 9732.

If you have spreadsheet software, like Microsoft Excel, on your system, it opens a CSV file automatically. The spreadsheet makes it convenient to see and edit the data, and you do not need to worry about placing the commas.

NOTE: No matter what software you use, make sure that it preserves the CSV file format and does not add any characters to the file. If you use spreadsheet software, make sure you save your data as a CSV file without formatting and not as a spreadsheet-formatted file like an Excel XLSX file. Spreadsheet files will not upload.

TIP: If you are unable to preserve the leading zero in the Postal Code column when exporting the data from your system of record, then use the Microsoft Excel cell formatting feature found in "Format Cells > Special > ZIP Code".

(If your implementation uses non-English languages, see also Upload and Download Guidelines for Non-English Languages.)

Upload a Contact Data File via the Manager Portal

Perform the following procedure to manually upload a Contact data file. **Step 5** provides the option for you to add (Update), replace, remove (Delete) contacts, or restore deleted contacts.

Before uploading a Contact data file using either the web-based interface or via SFTP, Everbridge recommends you make a backup of your current file. Follow the procedure below.

To make a backup of your current Contact data file:

1. From the **Contacts** tab, select **Download**. A CSV file is downloaded to your desktop. Its filename is your OrganizationName_contacts_and a number.zip.
2. In case you need to revert to this data file, you have it available on your desktop

Reminders

1. You must use the downloaded CSV file from the **Deleted Contacts** subtab in order to restore deleted contacts.
2. The **Restore** option does not update contact information; it only reactivates a deleted record.
3. Make sure the latest upload status is **Done**. Do not add, edit, or delete contacts during a contact restore. Do not restore contacts if the upload status is **In Progress** or **Geocoding**, during canceling, or when other users add, edit, or delete contacts in the Organization. (Refer to Deleting or Restoring Contacts for details.)

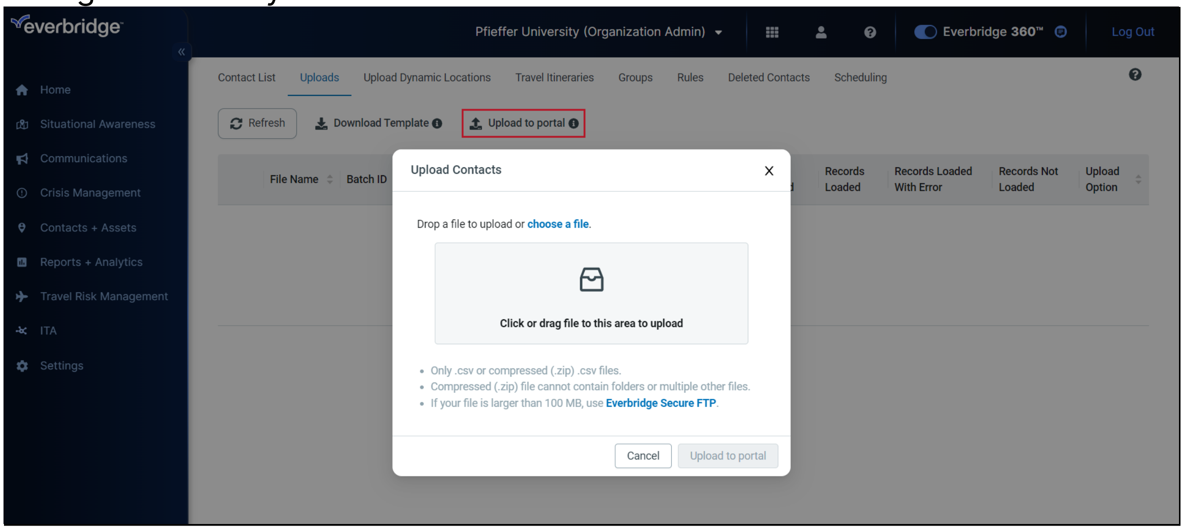
Upload Contacts

As a reminder, we strongly encourage downloading a backup of your contacts before uploading new files.

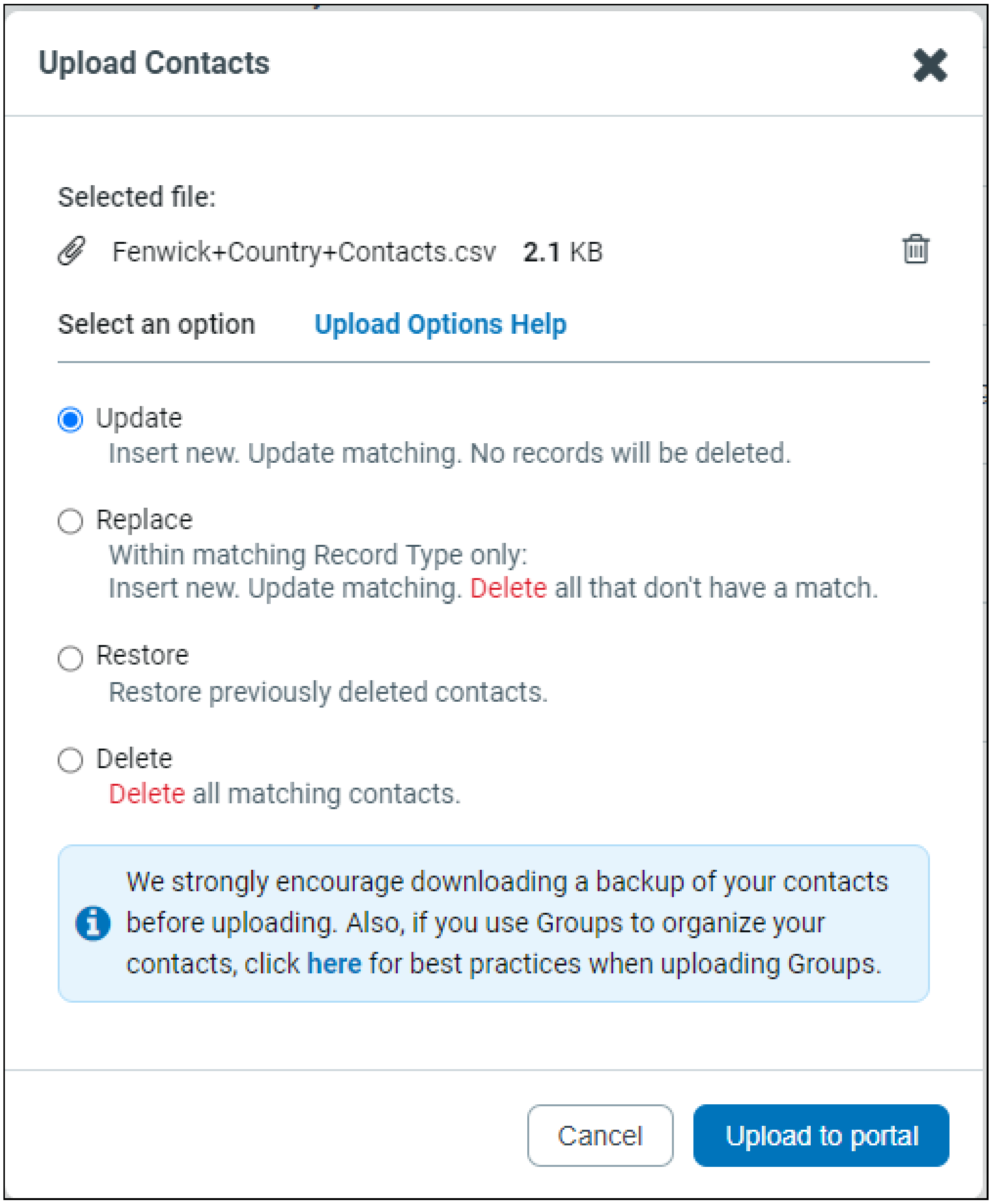
To upload a list of Contacts using the web-based interface:

1. From the **Contacts** tab, select **Contacts** if needed, then click **Uploads**.
2. Click **Upload to portal**. The **Upload Contacts** dialog appears.

3. You can drag a file to the dialog box or click **choose a file** to open a second dialog to browse your device's files.



   a. You can upload a CSV file, TAR.GZ file, or compressed (ZIP) CSV file. The maximum CSV, TAR.GZ, or ZIP file size is 100 MB. When more than 100 MB, use Secure FTP. (See Uploading a Contact Data File Via Secure FTP.)
4. Locate your file to upload, and either double-click its filename or select the filename and click **Open**.
5. Select one of the following:
   a. **Update**—Only insert new contact records and update existing contact records.
   b. **Replace**—Replace all contact records with the matching recordType in the CSV file.
   c. **Restore**—Restore previously deleted contacts. Restore will overwrite existing contact records that have the same External ID.
   d. **Delete**—Delete all the contact records that match the records in this file.
6. To process the file, click **Upload to portal**. An Alert message appears.
7. Click **OK**. You are sent two automated emails:
   a. One that the contact data file was received
   b. Another that the contact data file has been processed.



There are six stages in file processing contact data.

- **Queuing** — The records are preparing for updating or insertion into the database.
- **In Progress** — The records are updating or inserting in the database.
- **Geocoding** — Addresses with no latitude and longitude are processed to add the location; otherwise, if already done, no geo-coding occurs. It could take a while to process the geo-coding. The contacts that are not map-based are available for a Notification. Once geo-coding is complete, contacts can be selected from the map. Review the following about geo-coding:
  - You can geo-code any location, domestic or international.
  - The geo-coding process supports foreign language characters, making geo-coding global locations quick to locate.

    - Each location that is defined for the contact displays on the Universe view.
    - When you enter an address, it could be geo-coded. That is, the latitude and longitude of the address are verified to be a location on earth. If you enter your own latitude and longitude, the geo-coding is not verified.
    - Assuming the contact records pass the most critical validation tests, all records are immediately loaded in the database as the file is processed. This ensures the contacts are available for a Notification even though the upload is waiting for the “Geocoding” results to return. While waiting, any address submitted without a Latitude/Longitude does not have its pair of values in the database record and is not available for selection on the map; however, the address record is available for filtering with a Rule or Advanced Search feature from the Notification workflow.
    - Everbridge Suite attempts to geo-code any address submitted via the CSV file if the Latitude X and Longitude X fields are empty in the file - even if the address was submitted in a previous file and geo-coded in a previous upload. Suppose your first upload file includes 8,000 addresses and all the addresses in that CSV file get geo-coded. If you upload a subsequent file with 8,001 addresses, where only one address is new but no Latitude/Longitude is provided in the file for any address, then Everbridge Suite attempts to geo-code all the addresses again (not just the new address).
- **Canceled** — The upload was canceled. If you need to cancel the upload, click **Cancel**. During the **In Progress** stage, only data before the cancel is saved. During the **Geocoding** stage, only the addresses are saved, but not their corresponding latitudes or longitudes.
- **Failed** — The records failed to upload.
- **Done** — The system sends an email. In addition, when the upload is complete, the map tiles for the contact layers are refreshed if you loaded addresses for contacts.

To verify or preview the uploaded contacts, read the next section.

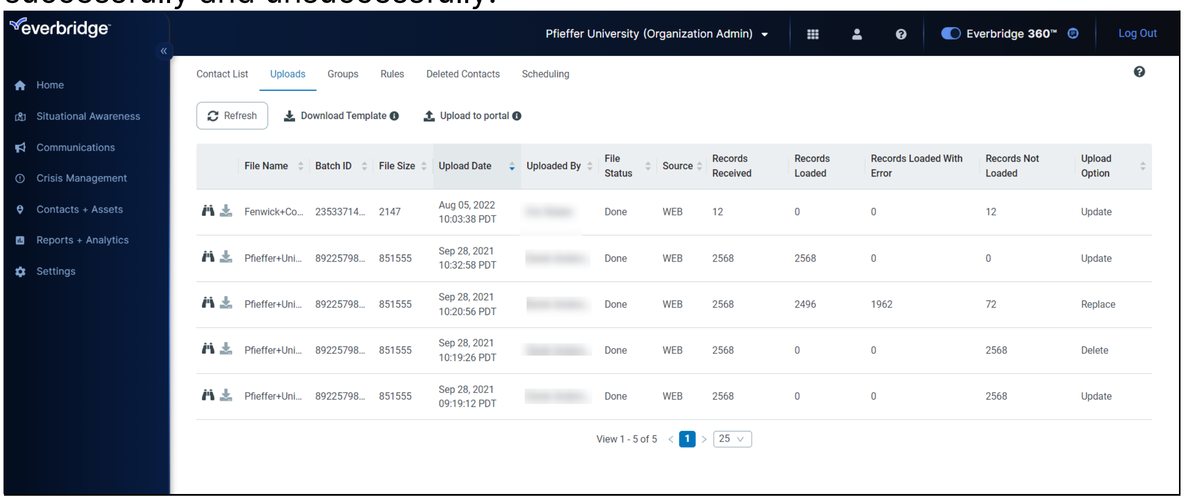
Download the Contact File

1. From the **Contacts** tab, click **Uploads**. Your list of uploads appears.
2. Click the **Download** icon in the row of the upload file you want to save. You will receive an alert popup confirming the download. The file will be delivered to your email after processing.
    1. The Download icon is disabled for files that have expired (30 days after upload) or for files that failed.

View the Upload Results

To see the upload results:

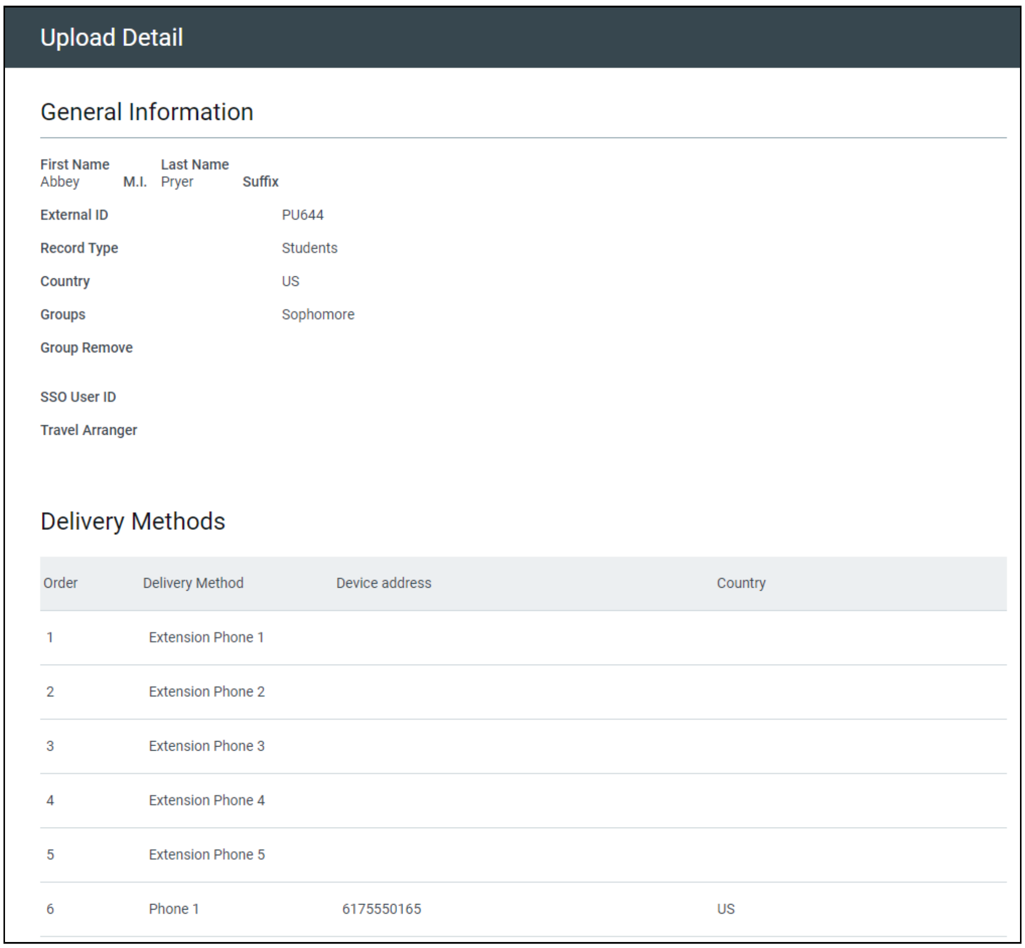
1. From the **Contacts** tab, click **Uploads**. The list of uploads appears.
2. Check the **File Status** column. A status of "Failed" means no records were received or loaded from the file. (Failed uploads can occur because File Encryption is ON. Turn OFF File Encryption and upload again.)
3. Refer to the **Source** column to check what means were used to upload these records.
4. Hover over the row of the upload file you want to review to highlight that row. Initial Upload Results are displayed including which records loaded successfully and unsuccessfully.



5. For a deeper view of an individual file upload, click the **View** icon on the left side of a specific row. The contact records that were received are listed on one of the three results tabs:
   a. **Loaded without error** - Records loaded normally.
   b. **Loaded with error** - Records that had something incorrect, but there was enough good information to load them anyway. Click **Download** to download a new file and fix the errors before uploading again.
      i. Upload errors can be identified in the far column under **Upload Row #**
   c. **Not loaded - critical error** - Records that had severe errors were not loaded. Click **Download** to download a new file and fix the errors before uploading again.

i. Upload errors can be identified in the far column under **Upload Row #**

6. Note the following example results.
   - **Loaded without error (*nn*),** where *nn* is the number of contacts loaded without error.
     - Clicking the View icon next to a contact's name displays the contact information.



- **Loaded with error (*nn*),** where *nn* is the number of contacts loaded with errors. The Error Message is displayed in the **Error Message** column.

Loaded without error (0) | Loaded with error (1) | Not loaded - critical error (11)

	First Name	M.I.	Last Name	External ID	Record Type	Error Message	Upload Row #
	Alex		Hayward	AH01	Contact	Record Type is Not Defined: Record Type: Contact UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 2: Hierarchy	5
	Andrew	F	Mahon	AM01	Contact	Record Type is Not Defined: Record Type: Contact UPLOADCONTACT_ATTRIBUTE_NAME_NOT_DEFINED_IN_ORG: Custom Field 2: Hierarchy	3

- **Not loaded - critical error (*nn*)**, where *nn* is the number of contacts not loaded from the CSV file.
  - An example error message here could be: **UPLOADCONTACT_RECORD_TYPE_NOT_FOUND_IN_ORG: Record Type: Opt-In**. In this case, configure **Settings > Organization > Contacts and Groups > Contact Record Types** by adding the Opt-in record type.

Loaded without error (2) | Loaded with error (2) | Not loaded - critical error (2)

	First Name	M.I.	Last Name	External ID	Record Type	Error Message	Upload Row #
	Contact2		Test	Contact2		UPLOADCONTACT_RECORD_TYPE_NULL_ERROR: Record Type:	3
	Contact5		Test	Contact5		UPLOADCONTACT_RECORD_TYPE_NULL_ERROR: Record Type:	6

Page 1 of 1 25 View 1 - 2 of 2

Upload Messages

Message	Possible Problem	How to Correct
Your file was not loaded; some or all column headings are not in the correct format. Download the contact upload .csv file, or check the help file for more information.	One or more column header names were all in lower case or upper case.	Download the CSV Template from the Uploads page to review expected column header name format.

Your file was not loaded; a required column is missing. Download the contact upload .csv file, or check the help file for more information.	One or more required columns missing from file.	See the Contact Upload Data Table for a description of each column.
Your file contained unexpected columns that were ignored in the upload. See upload results below.	One or more columns were not expected; the data values in the unexpected column are not loaded.	Remove unexpected column or correct column name. Download the CSV Template from **Uploads** page to review expected column header names.
Your file was not loaded; the data and columns do not align. Check your file and try uploading again.	The number of data values for one or more rows does not match the number of column headers.	Either remove any commas from data values or enclose the data value with double quotes.

Click **Contacts** to return to **Upload Results**.

- If your browser is configured to open in a new tab, you will see two Contacts tabs in the browser. The one to close is the right-most one.
- If your browser is configured to open in a new window, close that window.

Upload a Contact Data File via Secure FTP

By configuring your computer and Secure FTP (File Transfer Protocol) software to work together, you can submit the CSV file containing your contact records. The computer system needs to add and place the data file in the location configured in the Secure FTP software. The Secure FTP software is scripted to perform the transfer.

> **NOTE:** If encryption is turned on in the Secure FTP settings and you want to upload a file that is not encrypted, then you need to turn off encryption in the settings, then upload the file, and turn encryption back on.

To submit a Contact data file via Secure FTP:

1. First, make a backup of your current Contact data file. (See the procedure Backing Up Your Existing Contact Data File.)
2. From the **Settings** tab, select **Contacts/Assets > Upload Options** at the Organization level or **Security > Secure FTP** at the Account level. See Upload Options to configure your system to add a contact upload file in the Everbridge format. You then script or schedule software that supports Secure File Transfer Protocol (FTP) to upload your file to Everbridge.
3. With your IT department, use Secure FTP to upload CSV data files and use File Encryption for additional security.

   > **NOTE:** Unlike Contact data, Asset data does not support File Encryption.

4. Download the Access Instructions to prepare and test your connection to the Everbridge Secure FTP Server as well as to encrypt your Contact data at the file level using PGP or GPG in addition to the standard encryption in transit (SSL or TLS) provided by Everbridge.
5. > **NOTE:** The Access Instructions are intended to guide you in exploring and testing the Everbridge Secure FTP connectivity. They do not provide instructions for developers since Everbridge does not know which tool your Organization uses to develop your FTP client. Contact

your IT department regarding third-party tools and/or any source code for interfacing with an FTP server.

6. Prepare your Contact data file. (See Choose File Upload Process.)
7. Ask your IT department to configure your computer system and Secure FTP software. The Secure FTP software is scripted to perform the transfer. (For a description of the FTP directories, see step 5 of the procedure, Upload a Contact Data File via the Manager Portal.)
8. On the server, use the following folders as destinations for your contact data file:
   a. **Update** - Equivalent of the UPDATE option in the Upload page.
   b. **Delete** - Equivalent of the DELETE option in the Uploads page.
   c. **Replace** - Equivalent of the REPLACE option in the Uploads page.
   d. **Result** - The results of any upload request
   e. **User** - The client can load a CSV file containing user records to add.
   f. **Gis** - The client can load a point-address file.
9. For more information, see Step 5 of the procedure Upload a Contact Data File via the Manager Portal.
10. When the Contact data file is transferred, from the Contacts tab, perform Steps 5-7 of the procedure Upload a Contact Data File via the Manager Portal.

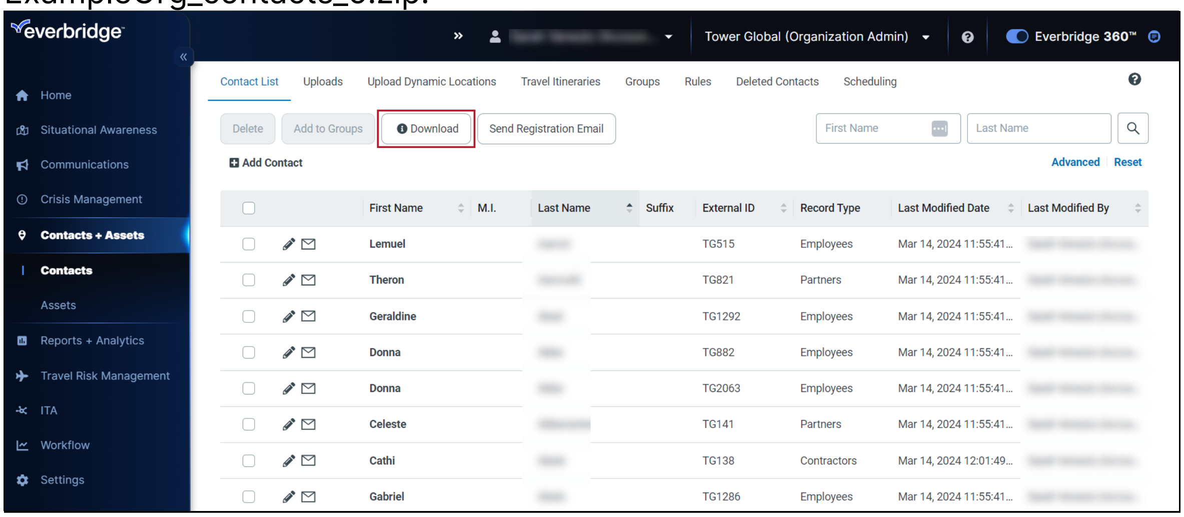
NOTE: When sending a file using encryption via Secure FTP, the Results file is not encrypted. For more information about encryption, read the Upload Options section of this guide.

Backing Up Your Existing Contact Data File

Before uploading a Contact data file using either the web-based interface or via SFTP, Everbridge recommends you make a backup of your current file. Additionally, Everbridge also recommends you back up your Contact data every month as well. Having a backup file of your Contacts helps ensure that if you ever need to restore that data, you will be able to with minimal effort.

Follow the steps below to download a .CSV file containing the current Contact data in your Organization:

1. Navigate to the **Contacts** > **Contact List**.
2. Select **Download**. A .CSV file is downloaded to your desktop. Its filename is your OrganizationName_contacts_and a number.zip. For example: ExampleOrg_contacts_5.zip.



> **NOTE:** If the .CSV file contains a large amount of data, it may take a while to download. You can keep working, however. This process runs in the background and Everbridge emails you when it is done.

3. Use this .CSV file in case you need to revert to this data. (See [Upload a Contact Data File via the Manager Portal](#).)

Custom Reports

The **Reports** module allows you to add Custom Reports. Custom Reports are used to create a report that covers multiple Notifications or Incidents, as well as travel information for Travel Protector customers.

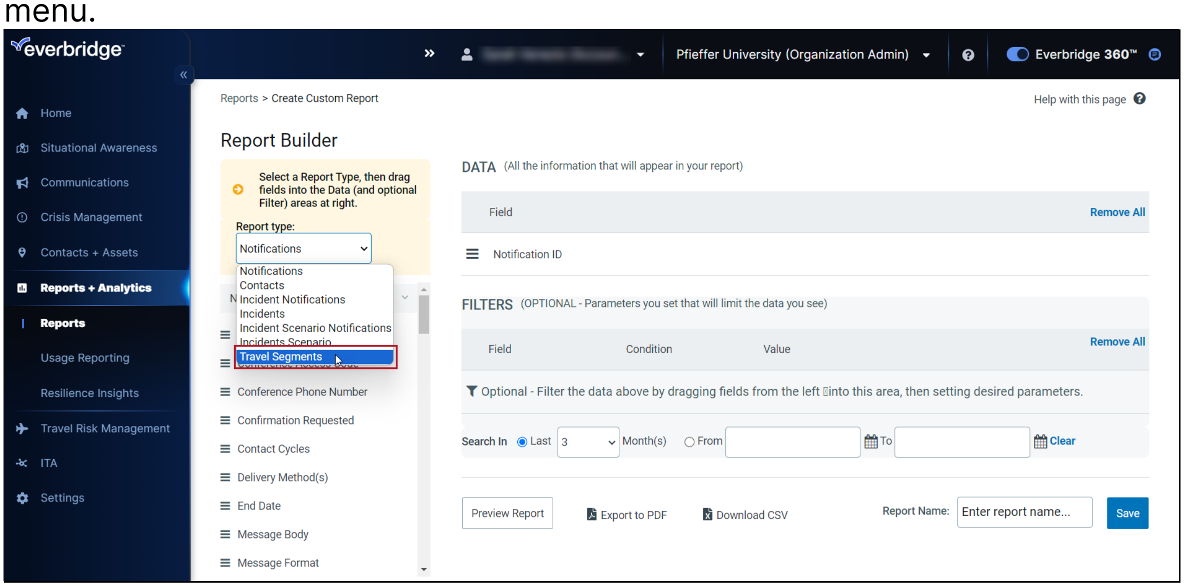
There are five levels of report types for incidents:

- **Contacts** - provides information about the contacts.
- **Incident Notifications** - provides the attempt levels and paths contacted.
- **Incidents** - provides information about the incident.
- **Incident Scenario Notifications** - provides the attempt levels and paths contacted.
- **Incident Scenario** - provides information about the scenario.
- **Travel Segments** – provides information about travel itineraries, segments, and travelers.

Travel Custom Reports

To add a new Travel Custom Report:

1. From the **Reports** tab, click **Create Report**. The **Report Builder** page is displayed.
2. On the left-hand pane, select the **Travel Segments** Report Type from the menu.



3. After selecting the Report Type, data fields will appear under the report type you selected. To add a data field to your report, drag a data field to the **DATA** panel. To delete a chosen data field, click the Trash Bin next to the field name. When you add fields to the DATA panel, they are added at the bottom

of the list. When the fields are displayed in the report, they are displayed from left to right.

> **NOTE:** You must add **at least one** data field related to Traveler information, such as first name, last name, or record type, along with at least one data field related to a travel segment.

4. Repeat Step 3 for all data fields you want in your custom report.
5. Set filters to narrow down the data to the values in which you are interested. Filters are optional. For example, you might only want to see travelers arriving in a specific country.
   a. To add a filter, drag a data field to the **FILTERS** panel.
   b. Select the desired condition statement from the drop-down list.
   c. Type or select the desired value in the correct format for the data type in the **Value** field.
6. Repeat Step 5 for each desired filter. To delete a filter, click the Trash Bin next to the field name.
7. Select a time frame of either **Now** (default) or enter a specific range (Past or Next xx hours or days). The maximum date range is 365 days, or a custom time range by specifying the start and end days (Maximum is one year between the start and end dates).
8. Click **Preview Report** to review your customizations. Use the Page Controls at the bottom of the page if you would like to view more records.
   - To choose the number of records displayed on each preview page, select a number from the drop-down list.
   - To add more data to your report, repeat step 3. To add more filters to your report, repeat step 5.
9. After the report has been configured and the preview shows you the desired data, you can export the results to a CSV file. Many software applications, including Microsoft Excel, can open a CSV file.
10. To save the report under the Reports tab, enter a name in the **Report Name** field and click **Save**. If at any time in the future you would like to run this report with updated data, click the report name under **Custom Reports**.

> **NOTE:** Use the Excel Data Import feature to import the CSV-formatted file into an Excel workbook.

Example Travel Custom Report

The following procedure provides the steps to create a custom report for travelers that are traveling by Air to Germany in the next 30 days. Contact reports are helpful for resolving missing data, such as a delivery method.

To create a report of travelers traveling by Air to Germany in the next 30 days:

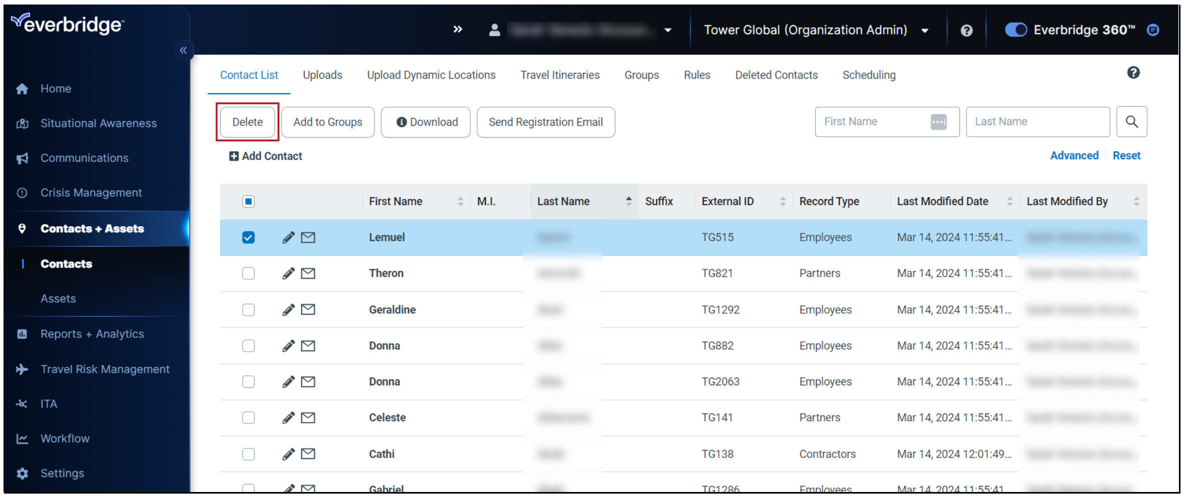
1. On the left-hand pane, select **Travel Segment** from the **Report Type** drop-down list.
2. Drag the following data fields to the **DATA** panel:
   - **First Name**
   - **Last Name**
   - **Traveler Report Type**
   - **To Date**
   - **PNR** (Optional)
3. To filter the data by country and time range:
   a. Drag the **Arrival Country** data field to the **FILTERS** panel.
   b. Under **Condition**, select **contains**.
   c. Under **Value**, select **Germany**.
   d. In the Search By section select **Specific Range**.
   e. Select **Next** and **Days** in the dropdowns and enter **30**.
4. Click **Preview Report** to review your customizations. If you want more data or filters added to your report, repeat Steps 2 and 3.
5. To save the report to your device, you can export it by clicking **Download CSV**.
6. To save the report under the **Reports** tab, enter a name next to **Report Name**. Click **Save**.

> **NOTE:** Do not open the CSV file until the file is finished processing. Excel will shorten long External Ids if the file is opened before processing is finished.

Deleting or Restoring Contacts

To manually remove an individual contact:

1. From the **Contact List**, select the checkbox of the contacts you want to delete.
2. Click **Delete**.



3. Click **Yes** to confirm the deletion.

You have 30 days from the deletion date to restore this contact. On the 31st day, the records are permanently purged from the database.

Deleted Contacts

Administrators can restore contacts that were either inadvertently or intentionally deleted from the active database for an Organization. Only Administrator roles who have permission to edit contacts will have access to the Deleted Contacts page or to the upload option "Restore Deleted Contacts".

You have 30 days from the day you delete contacts (manually or via a CSV file) to restore those contacts. On the thirty-first day, the records are permanently purged from the database.

The **Deleted Contacts** tab shows the contacts who have been deleted.

NOTE:

1. Contacts on this page are permanently deleted after 30 days and cannot be restored to "active" status.

2. The date in the Last Updated Date column reflects new values when any change is applied to a contact record.
3. Last Updated By displays the full name of the authorized user in your Account who made changes directly (for example, change a value in a delivery method) or indirectly (for example, removing the contact from a group or deleting the group that contained the contact) to the contact record. In either case, the application updates the "Last updated by" field to show the name of the user who performed an action that affected the contact record.
4. A contact record cannot be edited from this page.
5. The system regenerates the contact layer on the map after a user restores one or more records.

It is possible that multiple records with the same **External ID** can be found in Deleted Contacts. You can either select the specific record to restore or to download in a CSV file.

- **Restoring Deleted Contacts manually**—You can restore up to 200 contacts manually at one time. If you select multiple records with the same External ID and select the Restore option, Everbridge Suite restores the deleted contact record with the most recent **Last Updated Date** and ignores all other instances of the same External ID. The Restore process overwrites existing contact records with the same External ID.
- **Restoring Deleted Contacts via CSV file**—The CSV download file provides all records selected, even if more than one record contains the same External ID. To download all the deleted contact records, do not select any individual contact records and click **DOWNLOAD**.

> **NOTE:** This “restore” feature is not available in the REST API /upload option or in the SFTP folders.

To manually restore deleted contacts:

1. From the **Deleted Contacts** subtab, select the checkboxes of the contacts you want to restore to the active database.
2. Click **Restore**. A Confirm dialog is displayed. The restore process overwrites contact records with the same External ID.
3. Click **Yes**. The selected contacts are restored to the Contacts list.
4. Click **OK**.
5. From the **Contacts** subtab, you see that the selected contacts have been restored.

Restore Deleted Contacts via CSV file

If you want to to restore deleted contacts via CSV file and have more than 200 Deleted Contacts, or want to use a CSV file rather than manually restoring Deleted Contacts, perform the following procedure:

1. From the **Deleted Contacts** subtab, either select the checkboxes of the desired Deleted Contacts from the list or leave clear the checkboxes to retrieve all of the deleted contacts.
2. Click **Download**.
3. Follow the steps in Uploading a Contact Data File.

> **NOTE:** You must use the downloaded CSV file from the **Deleted Contacts** subtab in order to restore the deleted contacts.

A CSV file is generated. The CSV file downloaded from the Deleted Contacts page contains only four columns. The **Restored Contact ID** column contains an internal identifier for the contact record that is required in order for the restoration process to be successful via the Uploads page.

> **NOTE:** Do not open the downloaded file in Excel, because doing so causes modification to the long numeric ID string, which when uploaded, cannot be read and the restore fails.

The restore feature cannot be used to update or replace data; this feature exclusively changes the underlying status of the record from “deleted” to “active”.