

**Regroup provides an easy-to-use solution that integrates with third-party databases.**

Regroup's secure FTP (SFTP) gives administrators, the ability to upload CSV files directly, delivering a hands-off approach to user management.

Manual uploads and schedules system maintenance can now be set on autopilot after a quick initial setup, including mapping shared information and calibrating the system to client preferences.

## **AUTOMATED FTP UPLOAD PROCESSING STYLES**

The system will automatically add any users who are not in the system. For users already in the system, it will append any additional data (such as emails or phone numbers) without deleting any existing information. If a database ID is present, any data with the exception of the primary email will be replaced.



### **Active Roster**

The active roster processing style will allow you to automatically remove members who are not included in your import request.

With this processing style, you can import only your active members at a regular interval and anyone who is inactive (not included in your most recent import) will be deleted from the Regroup database.

Any users who self-register have the possibility of being removed by the active roster processing style. If you would like to protect these users, please contact Regroup support.



### **Purge**

The purge processing style will allow you to overwrite the existing user data and only retain the data in your import request. Note that data entered manually via our web portal is protected.

Users who are in the Regroup database and belong to one or more groups (but are not in the incoming import file) will be removed from the Regroup database. Users who do not belong to any groups and who are not included in the incoming import will NOT be deleted from the Regroup database.

Any users who self-register have the possibility of being removed by the purge processing style. Please contact Regroup support if you would like to protect those users.



## USER IMPORT

### CSV FILE FORMAT

- Column headers are not recommended for your .csv
- **Required fields for csv processing:** FirstName, Email, Group ID
- Our system can accept unlimited Emails and Phone#s
- Other fields such as Last Name, Phone#, Carrier, Type, Username and Database ID are not required
- If you have phone numbers but not carriers, which is common, leave the carrier field blank. You can still give us the phone number and users will be able to receive premium text messages and voice messages.



## GROUP IMPORT

### CSV FILE FORMAT

- The group CSV files should be uploaded to the '**Upload/Groups**' folder.
- \* *For information on how to create a basic group via CSV click [Here](#)*



## (CAMPUS) LOCATION IMPORT

### CSV FILE FORMAT

- The location CSV files should be uploaded to the '**Upload/Locations**' folder or the '**upload/locations**' folder.
- \* *For information click [Here](#)*



## ADDING MEMBERS USING AN API

Using Regroup's standard user import format, you can export the user data from your database in XML format and post it directly to a secure URL or by postign a text file.

Once the data is received, the users will be processed immediately. All of our standard .csv processing rules apply to the API, as well.

In addition, the membership API allows you to retrieve data from Regroup in order to synchronize it back to your database, providing you with a two-way membership import that will improve data accuracy.

- **Retrieve data:** user changes within a given time period, admin permissions and more.
- Instantly process and manage users.
- Create and manage groups via API (create, purge, delete)
- Approve pending requests (pending topic and membership requests)