

LSAC Unite Essentials
Recruiting Tools Part II
Updated 3/19/2024

Exercise 1 - Add a Custom Data Import Template - JD

Task: Add a custom data import template for a .CSV file.

Scenario: You received a list of people who submitted an information request on the school website. Create a data import template with the same fields in the exact order as your import file. Match records by email address.

Your import file is found in the JD Participant Toolkit you downloaded from the Training Exercises area of the Unite Support Site. You will use the file corresponding to your Greek letter.

If you'd like to try the exercise on your own without detailed instructions, feel free to do so. If not, detailed instructions follow.

Guided Practice

1. Click **UTILITIES**.
2. On the *File Processing* tab, verify that Data Import Templates is selected.
3. Click +Add.
4. Enter the template information:
 - a. Description: Prospect Upload JD [your Greek letter]
 - b. Import type: .CSV
 - c. Match criteria: Email address.
5. Add fields to the template in this order:
 - a. First Name
 - b. Last Name

- c. Primary Email
 - d. Prospect Program Degree
 - e. Expected Entry Year Prospect
6. Click **Save**.