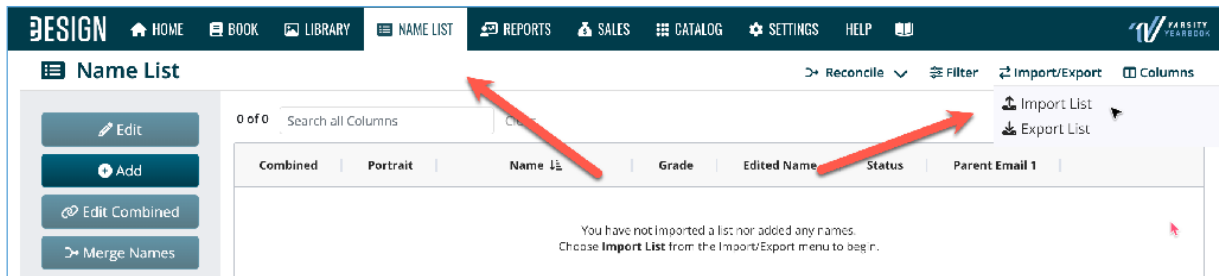


UPLOADING A NAME LIST

HOW TO LOAD A LIST OF ALL STUDENTS AND FACULTY INTO EDESIGN

The name list helps you ensure correct name spellings, record yearbook sales, track student coverage, electronically market books and ads, build an index, and more.



OBTAIN A STUDENT LIST FROM YOUR SCHOOL OFFICE

The name list should be an Excel spreadsheet (.xls or .xlsx) or a comma-separated text file (.csv). If your names include accent marks, use an Excel file. The name list should have separate fields for each piece of data listed below:

FIRST NAME — required for all name lists

LAST NAME — required for all name lists

GRADE — required for all name lists

STUDENT ID # — optional but **strongly recommended** to help keep your people data as accurate and clean as possible

TEACHER — (optional) a teacher designation (e.g., homeroom) can be helpful

PARENT EMAIL ADDRESS — required for using Send and Sell to promote sales and for participation in Sales Assist

UPLOAD THE LIST IN EDESIGN

1. Log in to eDesign and click the **Name List** tab.
2. Go to the **Import/Export** menu and choose **Import List**
3. Click **“Select File”** and locate the your name list file on your computer (.xlsx or .csv)
4. When you open the file, you’ll see the mapping screen.
5. Click the column headings and select the appropriate designation for each column.
 - You must map fields for **Official First Name, Official Last Name and Grade**. We strongly recommend including Parent Email and Student ID number as well.
 - When finished, click **“Next.”** Review your mapping choices and click **“Import Data.”**

That’s it! Your Name List is now loaded in eDesign

WATCH A TUTORIAL VIDEO



To see this process in action, watch the tutorial video linked here:

ybk.link/name-list-upload