

Enhancing PCO Address Data with ZIP+4 and Political Districts via Geocodio

This guide outlines the process of exporting address data from PCO, enriching it with ZIP+4 and political district information using Geocodio, and importing the enhanced data back into PCO.

1. ?? Set Up Custom Fields in PCO

Before importing enriched data, ensure that PCO has custom fields to store the new information:

1. Navigate to the **People** tab in PCO.
2. Click the **gear icon (⚙️)** and select **Customize Fields**.
3. Create a new **Custom Tab** (e.g., "Political Units").
4. Within this tab, add the following **Text** fields:
 - ZIP+4
 - Congressional District
 - State Legislative District House Name
 - State Legislative District Senate Name

Ensure these fields are saved and ready for data import.

2. ? Export Address Data from PCO

Option A: Export Entire Database

1. In the **People** tab, click the **gear icon (⚙️)** and select **Import/Export CSV**.
2. Click **Start Export** to generate a CSV file containing all profiles.
3. The CSV file will be emailed to you; download it from your inbox.

Option B: Export a Specific List

1. Navigate to the **Lists** tab in PCO.

2. Select the desired list or create a new one based on specific criteria.
 3. Once the list is generated, click the **download icon**.
 4. Choose to export all data on the people listed or only the data shown in the columns.
 5. If your list has fewer than 500 results, the CSV will automatically download; otherwise, it will be emailed to you.
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3. ? Prepare the CSV for Geocodio

1. Open the downloaded CSV file in a spreadsheet program (e.g., Excel, Google Sheets).
2. Ensure the following address columns are present and correctly labeled:
 - First Name
 - Last Name
 - Street Address
 - City
 - State
 - ZIP Code
3. Clean the data by removing any incomplete or improperly formatted addresses.

“ **Note:** PCO matches records during import based on **First Name** and **Last Name**. Ensure these fields are included and accurately maintained to prevent duplicate records.

4. ? Upload to Geocodio for Data Enrichment

1. Visit [Geocodio's upload page](#).
 2. Upload your prepared CSV file.
 3. During the upload process:
 - Map your columns to the appropriate address fields.
 - In **Step 3**, select the following data appends:
 - **ZIP+4 Code**
 - **Congressional District**
 - **State Legislative Districts**
 4. Proceed to process the file and download the enriched CSV upon completion.
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5. ? Prepare the Enriched CSV for PCO Import

1. Open the enriched CSV file.
 2. Ensure the following columns are present and correctly labeled to match your PCO custom fields:
 - First Name
 - Last Name
 - ZIP+4
 - Congressional District
 - State Legislative District House Name
 - State Legislative District Senate Name
 3. Ensure that each row corresponds to the correct individual in your PCO database.
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6. ? Import Enriched Data Back into PCO

1. In PCO, go to the **People** tab, click the **gear icon (⚙)**, and select **Import/Export CSV**.
2. Choose **Start Import** and upload the enriched CSV file.
3. During the import process:
 - Match the new data columns to the custom fields you previously created.
 - Review the data mapping to ensure accuracy.
 - Preview the import to check for any errors or mismatches.
 - Finalize the import to update the profiles with the new information.

⚡ **Important:** PCO matches records during import based on `First Name` and `Last Name`. Ensure these fields are included and accurately maintained to prevent duplicate records.

? Additional Tips

- **Permissions:** Ensure you have the necessary permissions in PCO to export and import data.
- **Data Accuracy:** Double-check the address data for accuracy before uploading to Geocodio to ensure reliable results.

- **Custom Fields:** Only profile information can be imported into PCO. Ensure that the custom fields are correctly set up to receive the new data.
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By following these steps, you can efficiently enhance your congregation's address data with ZIP+4 codes and political district information using Geocodio.

Revision #1

Created 2025-05-08 04:27:02 CEST by Rev. Sean Neil-Barron

Updated 2025-05-08 04:50:07 CEST by Rev. Sean Neil-Barron