

Enrollware User Import Specs

Enrollware can import users into the system from a Microsoft Excel or CSV file. This document serves to describe the format requirements for the import file.

Sample files can be downloaded here:

- <https://www.enrollware.com/help/enrollware-user-import-sample.xlsx>
- <https://www.enrollware.com/help/enrollware-user-import-sample.csv>

General Requirements

1. The Excel import file must be from Microsoft Excel 2007 or newer and use the file extension of .xlsx. The CSV import file must use the file extension of .csv.
2. The first row of the import file must be a header row containing the field names contained in the sample file.
3. The fields that are included must match exactly the ones in the sample.
4. The first four columns are required for each user:
 - a. Last Name
 - b. First Name
 - c. Email Address
 - d. Username
5. The remaining columns are optional for each user entry:

Phone, Address 1, Address 2, City, State, Country, Zip, Name On Card, AHA Instructor ID, HSI Instructor ID, ARC Instructor ID
6. A user will fail to import if either the username contains a comma (,) or is already in use.
7. The State field, if included, should be populated with a valid 2 letter state abbreviation.
8. There is a limit of 100 users per import file.
9. A random password will be generated and assigned to each imported user. Once imported, each user may reset their password using their provided email address.