

Enrollware User Import Specs

Enrollware can import users from a Microsoft Excel file. This document serves to describe the format requirements for the import file. A sample excel file can be downloaded from <https://www.enrollware.com/help/enrollware-user-import-sample.xlsx>

General Requirements

1. The import file must be from Microsoft Excel 2007 or newer and use the file extension of .xlsx.
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 file and in the same order. **All headers in the sample file must be included in the import file to be valid.**
4. The first four columns are required for each user:
 - a. Last Name
 - b. First Name
 - c. Email
 - 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.