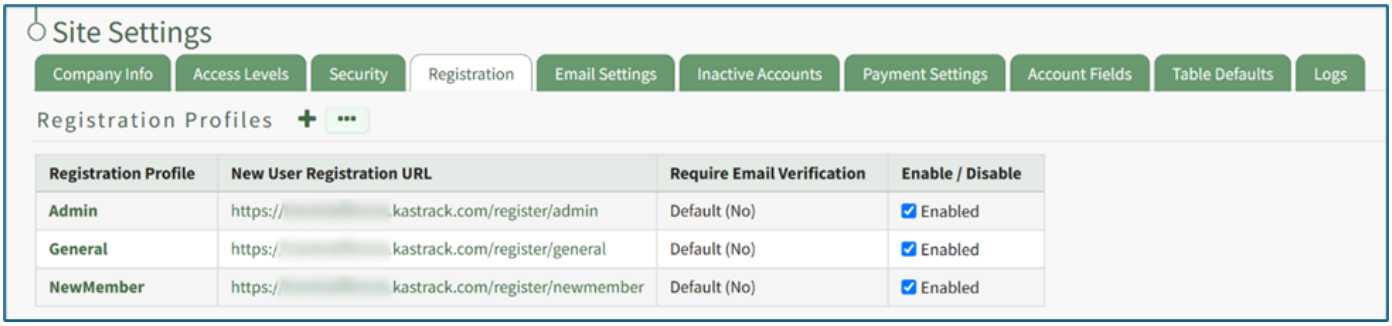
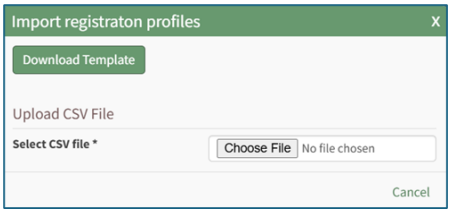
Import Registration Profiles

To import a CSV spreadsheet of existing registration profiles, go to the Registration Tab of the Site Settings Module.



Click the three dot (...) icon to open a context menu. Select “Import” opening the Import Registration Profiles Modal.

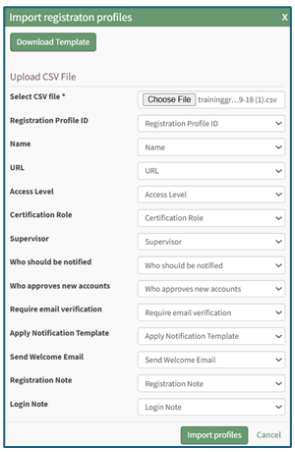


Select the “Download Template” button to download a CSV file with 13 pre-labeled columns.

Who Should be Notified	Separate multiple users or certification roles with a semi-colon
Who approves new accounts	Separate multiple users or certification roles with a semi-colon; Leave blank if no approval is required
Require email verification	Select “Yes” or “No”
Apply Notification Template	Input “Default New User” unless you have created a customized Notification Template (in the Communications Module) that you would prefer to use instead.
Send Welcome Email	Input “Yes” or “No”
Registration Note	Input a custom note to be included for new registrations.
Login Note	Input a custom note to be included for existing system users.

When all information has been included in the CSV file, save it with the CSV format UTF-8. Click the “Choose File” button or drag the CSV file into the Import Registration Profiles Modal.

The Import Registration Profile Modal expands.



After selecting your CSV, KAStrack will scan the first row for matching column headers and attempt to map those column headers to the names of the Registration Profile settings fields. The dropdown next to each field will automatically be set to any matching column headings from the CSV.

If a matching column couldn't be found, or if your import file uses column headers with different names than the Registration Profile settings fields, you can manually choose which column should map to those settings by choosing an option from the dropdown.

Select the “Import Profiles” button. If there are no issues with the imported CSV file, the new registration profiles will now show in the Registration Profiles Table.

If there were any issues during importing, the error will be explained in the Import Registration Profile Modal. Make the necessary changes and select the “Start Over” button to resubmit the corrected CSV file.

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