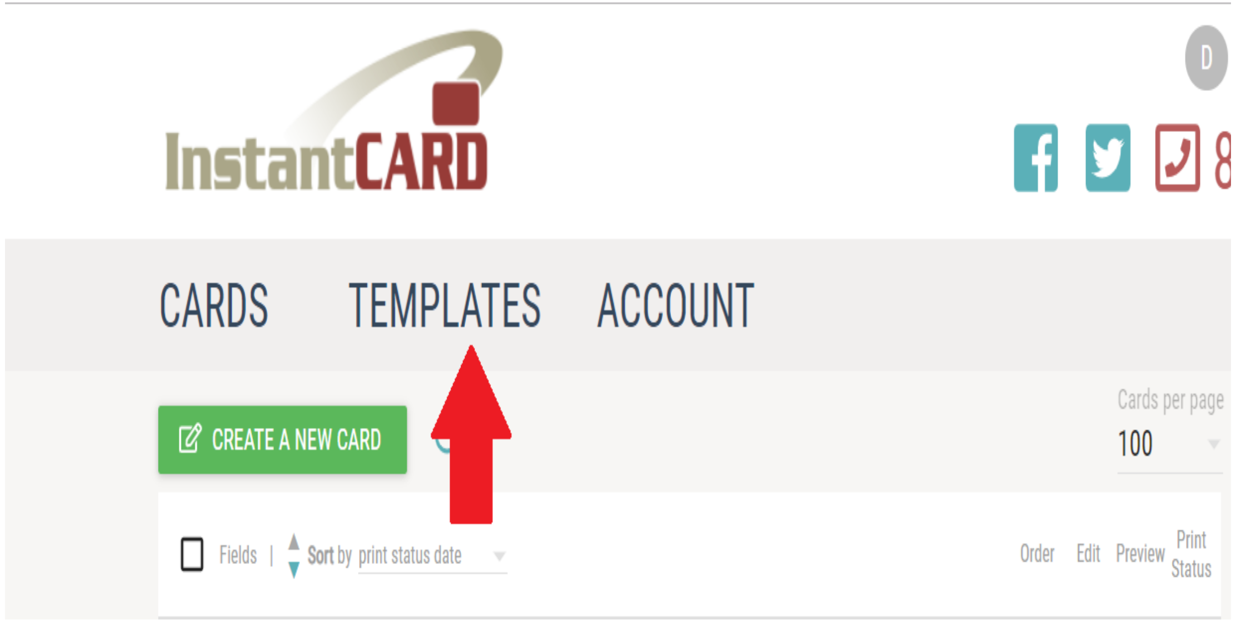
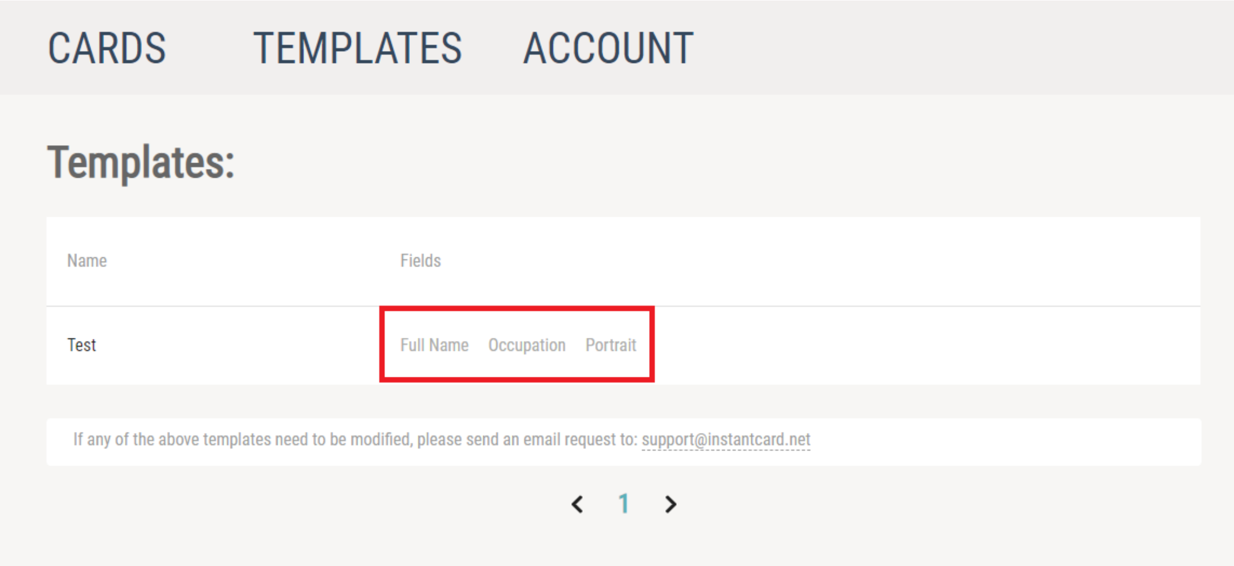
# Spreadsheet Upload using CSV Upload Function

# Step 1




The first step in the spreadsheet upload process is to check to see what the fields are in your template that you need to add into your spreadsheet. This can be found above where the red arrow shows you where you can find more information on your templates.

# Step 2



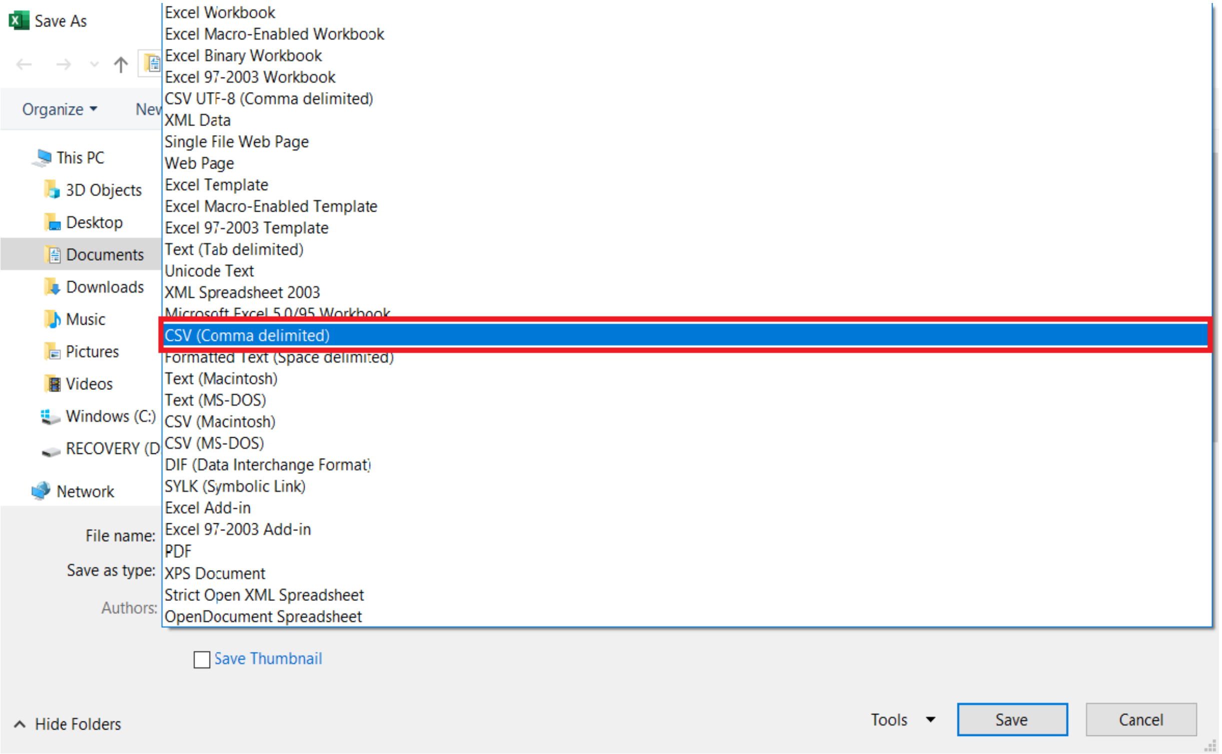

The highlighted fields will the fields that you will need to have information for. The first two fields (Full Name and Occupation) will be added to the spreadsheet, along with any other fields that you see here specific to your company’s templates. You do not, however, need to add a “Portrait” column as the photos will be added later.

# Step 3

| A | B |
|---|---|
| Full Name | Occupation |
| Jessica Smith | Head Baker |
| Johnny Wilson | Assistant Baker |
| Michelle Davis | Sales Associate |
| Catherine Brown | Assistant Baker |

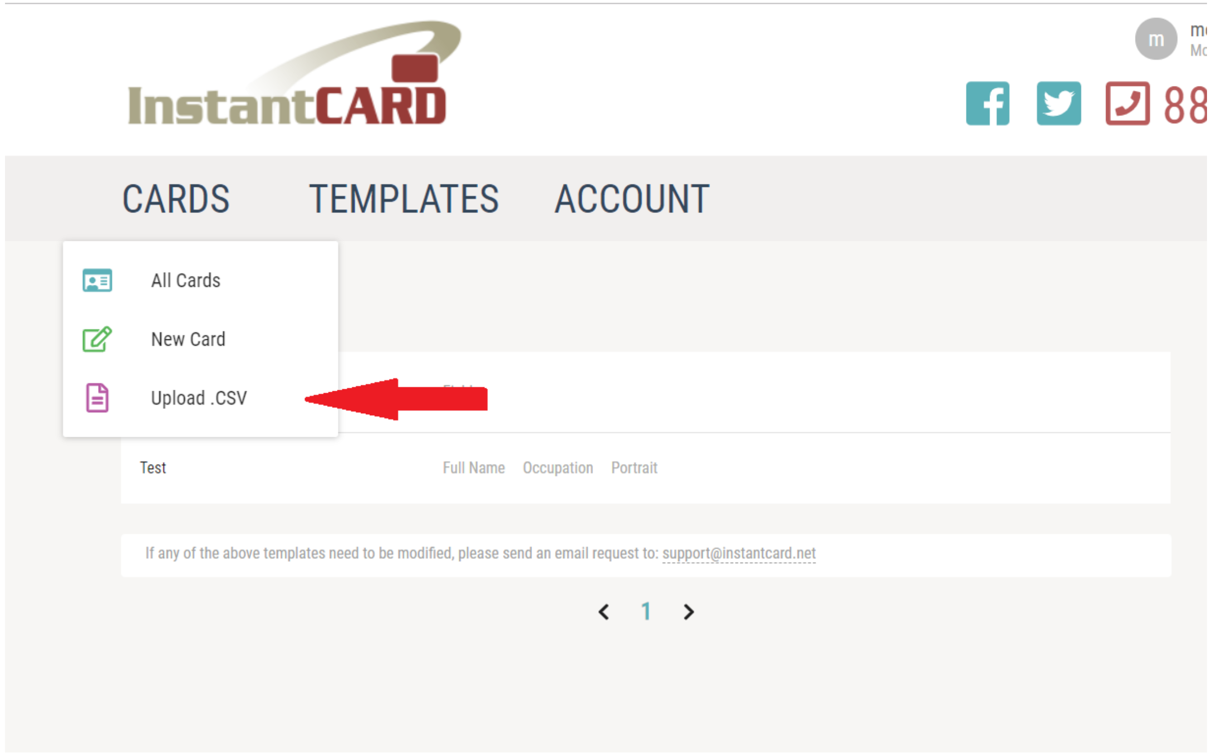
The highlighted portion in the image shows you where each of the fields' titles need to go and how to format them. It's important to make sure that each of the fields are put into separate columns, otherwise the system will not separate them and create the cards correctly. It's also important to make sure that the order and spelling reflects exactly what is seen in Step 2.

# Step 4



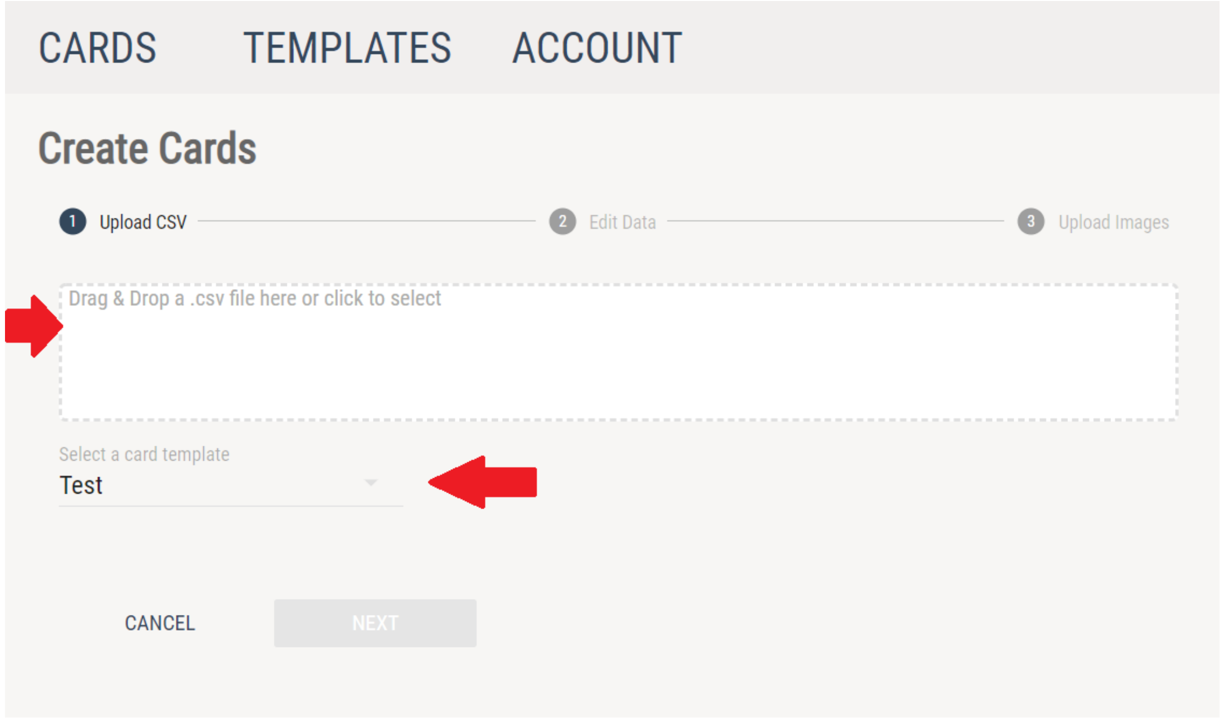

Once you've finished creating all the fields in the spreadsheet, save the file as a CSV file. To do this, select the "CSV (Comma Delimited)" option in the "Save as type" field. If you do not, when you try to upload the spreadsheet, the system will give you an error that the filetype is not supported.

# Step 5



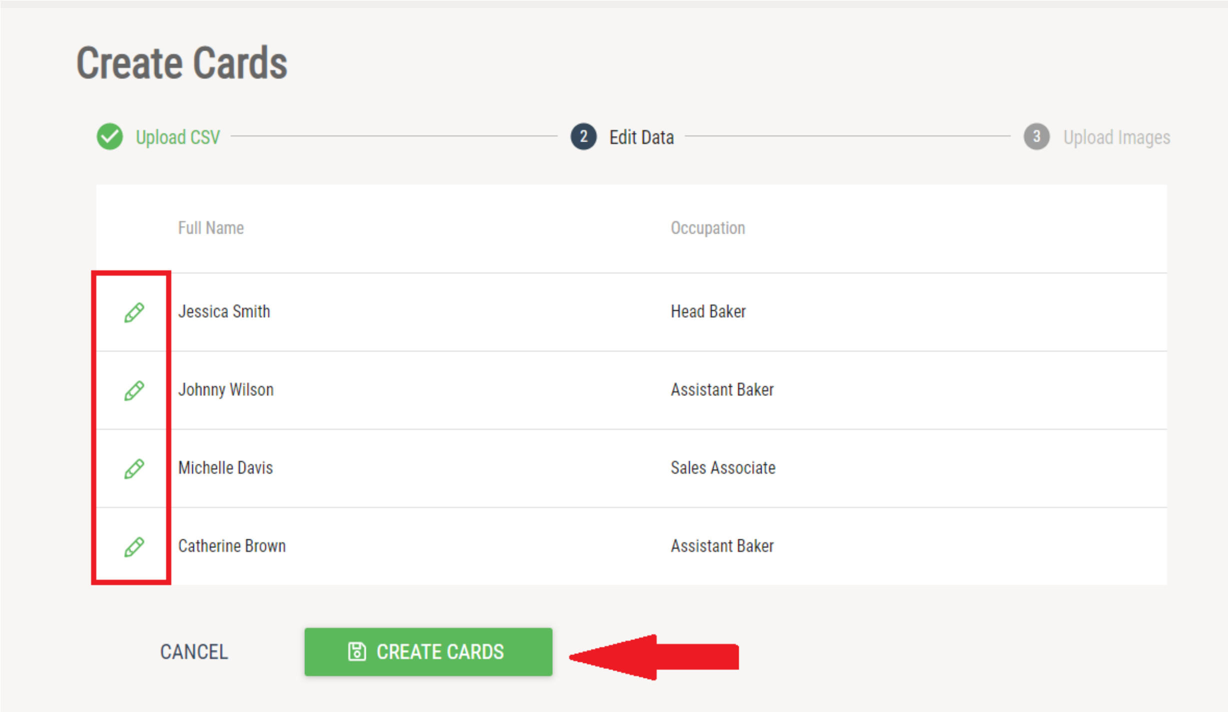

After saving the spreadsheet, you now will have to access the “Upload .csv” page. Under the Cards header, a menu will appear with three options. The arrow is pointing to the option to select to get to the page for the spreadsheet upload.

# Step 6



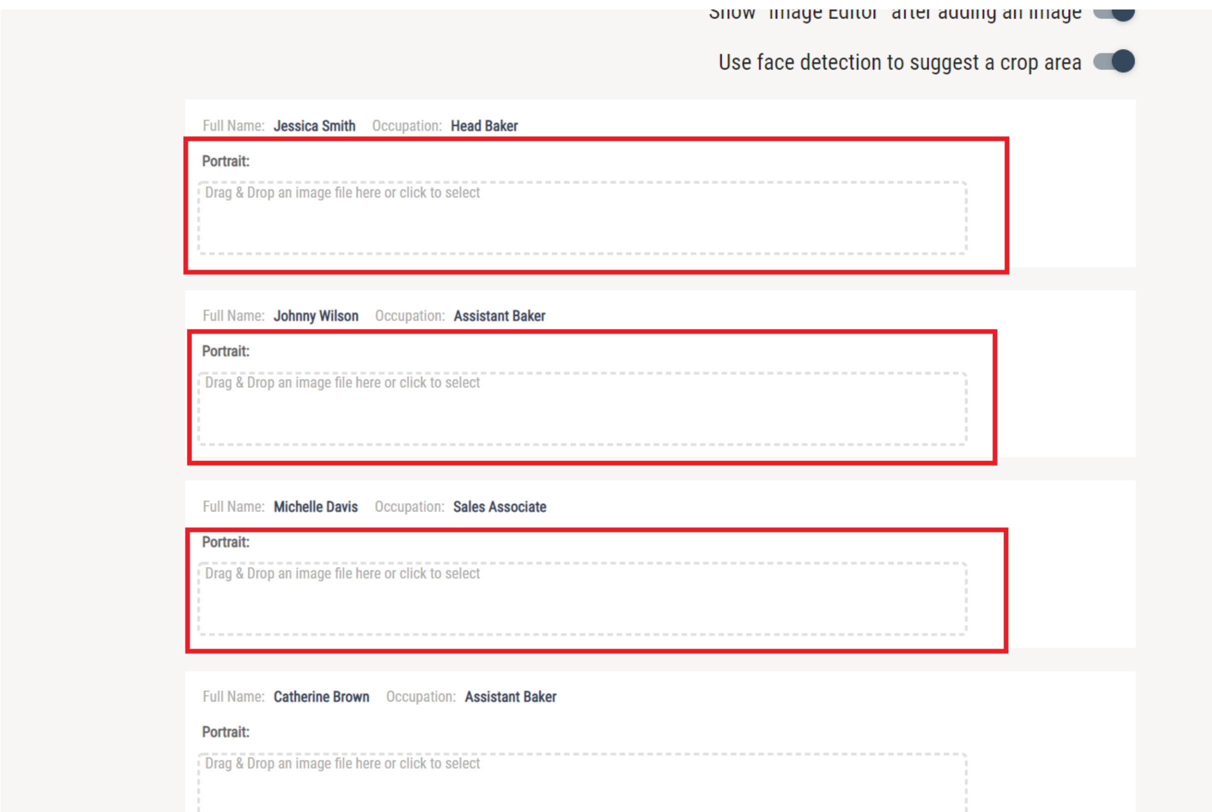

On the “Upload .csv” page, which is shown, the first arrow shows where to drag and drop or click to select the CSV file. The second arrow directs you to choose which of your templates that you would like to use. Once both of these fields have been selected, click “Next”.

# Step 7



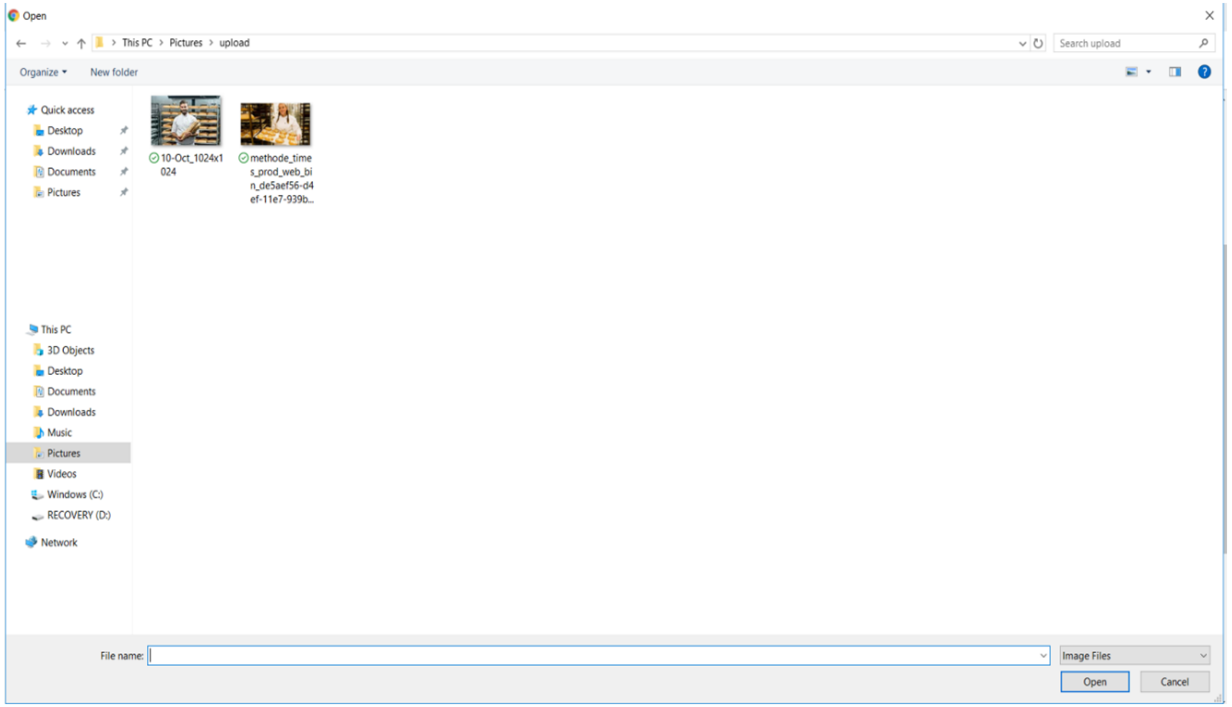

The next page will give you the capability to make any changes to the fields that you've entered. The green pencils on the left of the page allow you to edit any of the information that is now uploaded in the system as necessary. Once you've made all the necessary changes, you can then click "Create Cards" which will take you to the page to upload pictures.

# Step 8



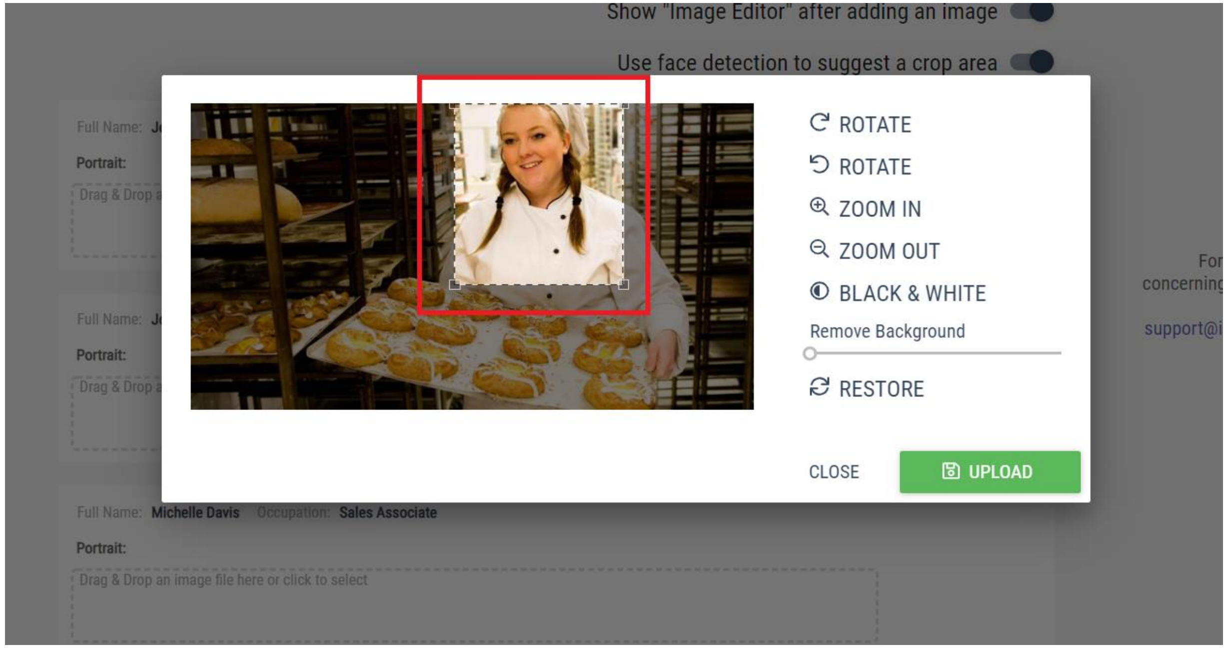

Starting at the top, click each of the highlighted areas to upload the photo for each employee. Click the box/area that says "Drag & Drop an image file here or click to select". A window will then appear.

# Step 9



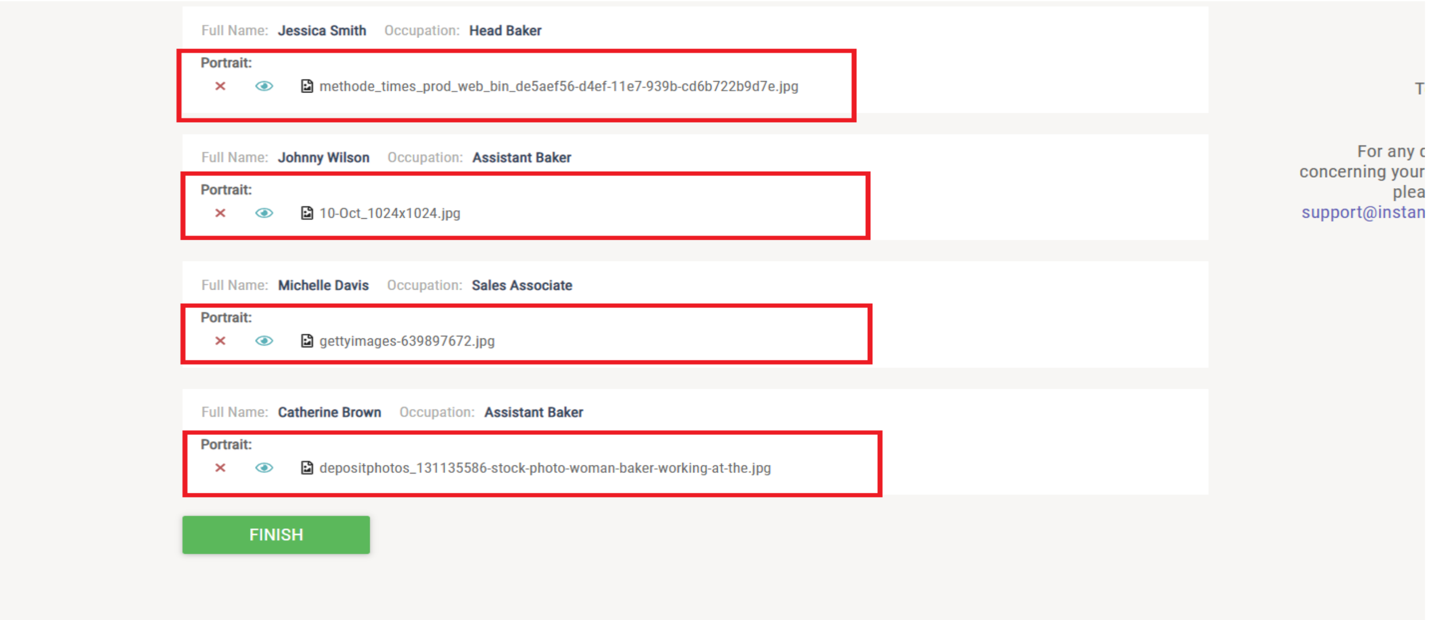

In the window that appears, select the image that you would like to upload for the employee by clicking on the preview.

# Step 10



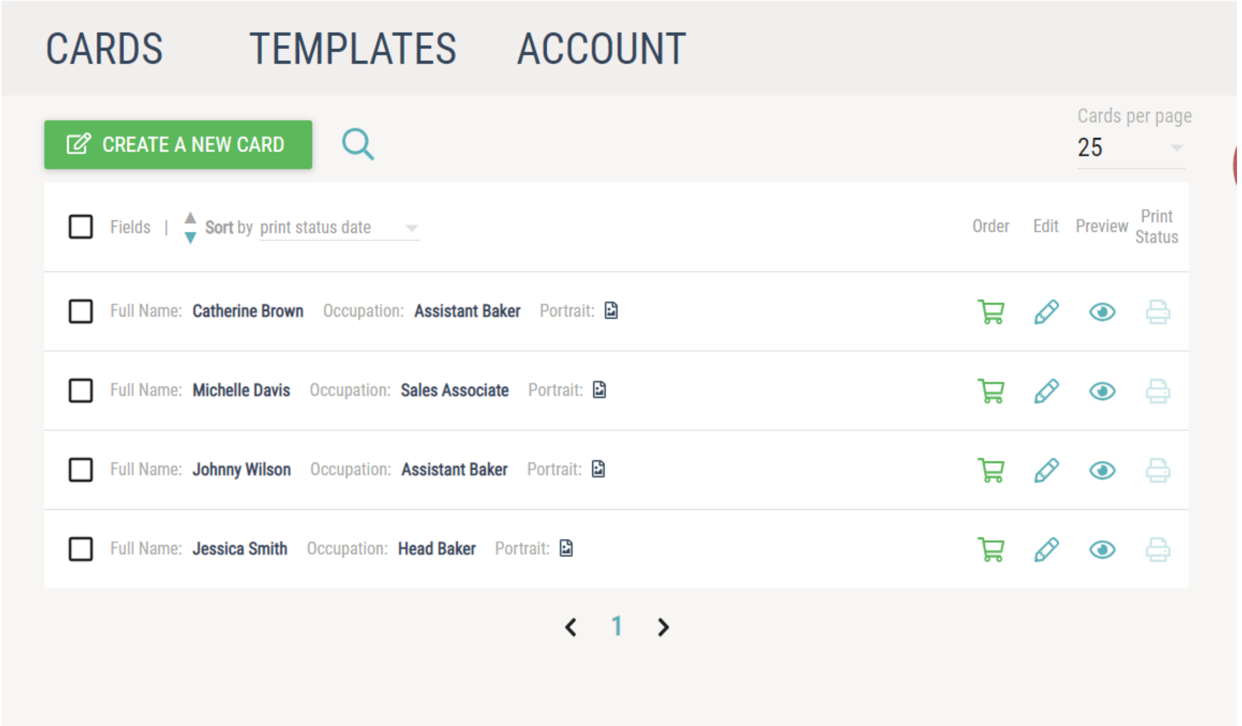

The image will then appear with a dotted line box around the recommended cropped image. You may then adjust the box and use the options on the right as needed.

# Step 11




Once you've completed steps 8-10 for each employee, the page will then look like this. The red boxes highlight what it should look like once each employee has a photo; each employee should have a photo filename. You can also preview (using the blue Eye) or delete (using the red X) each line. Click the big green "Finish" button when completed.

# Step 12




You'll then be taken back to the homepage and all cards that you just created will now be visible. They are now ready to be sent for printing!