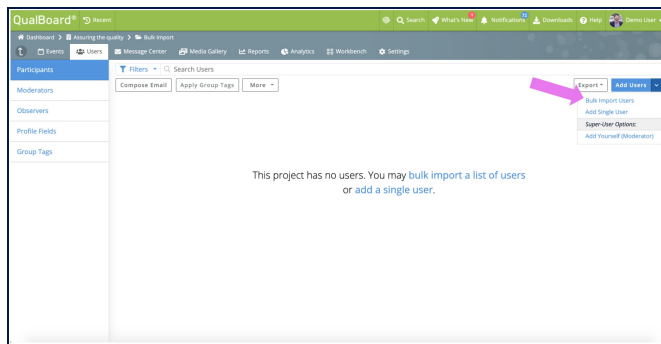


# Bulk Adding Users

Last Modified on 04/02/2021 11:27 am EDT

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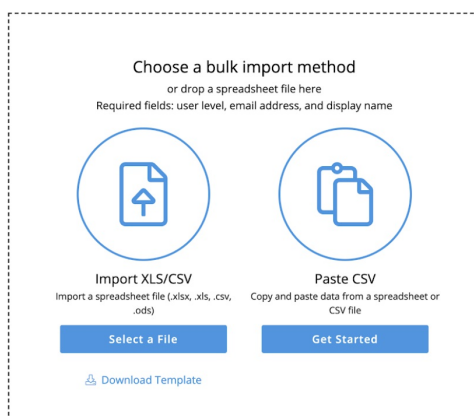
Start by clicking the drop down arrow by the **Add Users** button and select **Bulk Import Users**



You're well on your way! Click **Next** for the next step.

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Choose the way that you want to import the data into your project or event. If you choose to import a spreadsheet (accepted file types: .xlsx, .xls, .csv, .ods) from your computer, click **Select a file**. If you are wanting to copy and paste data from a spreadsheet or csv, click **Get Started**. Also note, this is a template available for download.



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Skip if Selecting a File

You will then get this field below. You must have a Display Name, Email, and User Level for your import (optional fields can be found here). Copy and paste the data into the area and then click **Start My Import**.

Bulk Import Users for: Bulk Import Example

Paste your spreadsheet data below:

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Review the information that you have uploaded. If you have a header row in the imported text, be sure the **First row is a header** box is checked. Make sure all of the columns are properly labeled. Note: the document will not import if you do not have a Display Name, Email, and User Level. When you are done, click **Preview Changes**.

☒ First row is a header

First Name	Last Name	Display Name	Email Address		Group Tags	User Type	
Olivia	Banks	Olivia	olivia.banks+1@2020research.com	1	female	participant	2
Liam	Smith	Liam	olivia.banks+2@2020research.com	2	male	participant	2
Noah	James	Noah	olivia.banks+3@2020research.com	3	male	participant	2
William	Davis	William	olivia.banks+4@2020research.com	4	male,group A	participant	4
James	Jackson	James	olivia.banks+5@2020research.com	5	male	participant	4
Jackson	James	Jackson	olivia.banks+6@2020research.com	6	male	participant	3
Oliver	Smith	Oliver	olivia.banks+7@2020research.com	7	male	participant	3
Ben	Smith	Ben	olivia.banks+8@2020research.com	8	male	participant	5
Elijah	Baker	Elijah	olivia.banks+9@2020research.com	9	male	participant	2
Lucas	James	Lucas	olivia.banks+10@2020research.com	10	male,group A	participant	3
Mason	Willis	Mason	olivia.banks+11@2020research.com	11	male	participant	5
Logan	Lake	Logan	olivia.banks+12@2020research.com	12	male	participant	3

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You can add profile fields by typing the name of the field into the text box at the top of column. Once you're ready, click "Next".

First row is a header

	Group Tags	User Type	Age	Country	State
20research.com 1	female	participant	24	United States	Ohio
20research.com 2	male	participant	26	United States	Michigan
20research.com 3	male	participant	21	United States	Tennessee
20research.com 4	male.group A	participant	45	United States	Iowa
20research.com 5	male	participant	43	United States	Washington
20research.com 6	male	participant	34	United States	Colorado
20research.com 7	male	participant	32	United States	North Carolina
20research.com 8	male	participant	54	United States	Washington
20research.com 9	male	participant	23	United States	Michigan
020research.com 10	male.group A	participant	34	United States	Washington
020research.com 11	male	participant	54	United States	Washington
020research.com 12	male	participant	34	United States	Ohio
020research.com 13	female	participant	54	United States	Iowa
020research.com 14	female	participant	23	United States	North Carolina

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You need to define each profile fields by their type. You can select the type by using the drop down menu. Once you've defined types for all of your profile fields, click "Next".

New Profile Fields

New profile fields found. Define below:

Name	Type	Value
Age	Text	Text
Country	Text	Text
State	Text	Text

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Evaluate the summary of your changes and make sure that it appears that your data is correct. If everything looks right, click **Finish**. If everything is right, then you will get a **Success** screen. If there is an issue, please reach out to [support@qualboard.com](mailto:support@qualboard.com)

If you are adding users from the project level, be sure to [add them to the event](#) as well so that they can participate in the study!

Finalize your import:

Summary of your changes

New Project Users: 60

Existing Project Users: (Your import does not include any existing users)

New Tags: 0

Go Back Finish

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Next

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