How to import members

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Using the **Import** functionality allows you to add or update multiple records at a time. Follow the steps below on how to import members.

Importing Members

1. Click **Settings** or the **Gear** icon on the left.
2. In the **Import & Export** section, click **Import Members**.
3. You will see a list of past imports. Click **Import**.
4. Please enter the information into the fields on the page to upload the data:
    - **Record Type** - Where the data will be imported into.
    - **File to import** - Select the CSV file to upload.
    - **Encoding** - The type of encoding used in the CSV file. (**Default** recommend)
    - **File Description** - The description of the import file.

1. **Section 1** displays a sample of the imported data for you to review.
2. **Section 2** allows you to map the fields of the imported data to the fields in the Entity.

Note

You can click the **X** on the field mapping to remove the field if it is not needed.

1. Click **Next** to import the file.
2. The **Import Data** page will display again, but with a progress bar on the right to show the progress of the import. To see the updated progress, please refresh the page.
3. Once done, you can review the data imported.

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