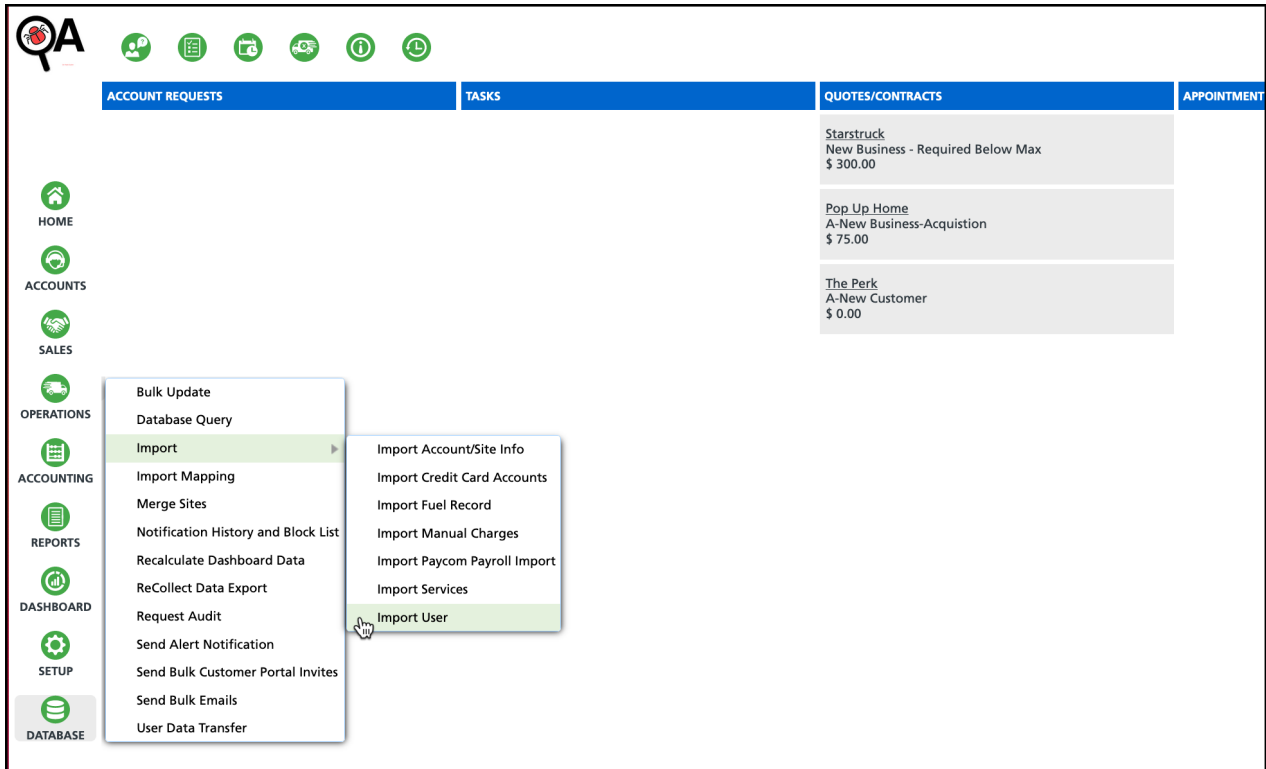


Import User

Last Modified on 09/16/2024 10:06 am EDT

The option to import system users is available in the Database module. This method provides an efficient way of mass creating user accounts in Navusoft. Once imported, user accounts can be updated from the User Setup and User Profile screens.



Permissions

The following permission is required to use the Import User feature:

Permission ID	Permission Name
458	Import User

File Format Import Requirements

Supported File Format: CSV

To successfully import users, the uploaded file must include the following columns in this order:

	File Columns	Additional Logic and Field Information
1	Status	Required. Uses the SQL values of '1' (Active) or '0' (Inactive).
2	First Name	Required to import the user.
3	Last Name	Required to import the user.
4	Email	Required for validation of user. If the email is already being used the account will not be created.
5	Phone	Not required.
6	Office Phone	Not required.

7	Title	Not required.
8	Department ID	Not required.
9	Manager ID	Not required.
10	Sales Goal Type	Not required.
11	External ID	Not required.
12	External User ID	Not required. Option to enter an external User ID for third party systems.
13	Color Schema	Options include: Gray, Blue and Green. If null/blank, the default color is gray.
14	Default Home Page	If null/blank, the default home page is set to 'Recent Activity.'
15	Automatic Counter Sign	Not required. Option for user's to enable automatic countersigning for contracts and other system prompted signature requests.
16	Division	Uses the Division ID. If more than one division applies, separate with a semi-colon.
17	Roles	Uses the unique ID for the role. If more than one role applies, separate with a semi-colon.
