

# Add Multiple Organizations

Last Modified on 06/29/2017 2:45 pm EDT

If you need to add many new organizations at once, instead of creating them individually, you can create new organizations in bulk by uploading a spreadsheet containing all their information.

For the bulk import, you can upload **all columns** that you see in the Organizations Index except for the final two columns: **# Activities** and **# Users** (these are calculated automatically based on the activities and users assigned to the organization).

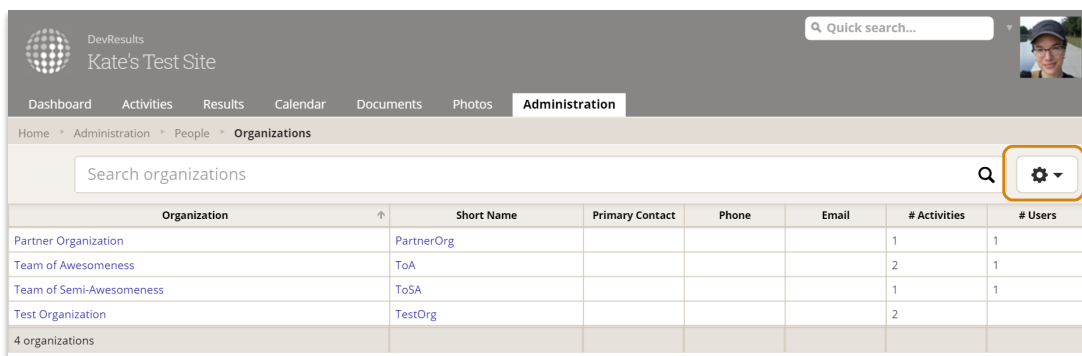
You can use this functionality to:

1. **Create new organizations in bulk** (enter new rows in the spreadsheet; anything without an organizationID gets added)
2. **Edit existing organizations in bulk** (edit the spreadsheet as-is; anything with an organizationID gets updated)

## Creating New Organizations in Bulk

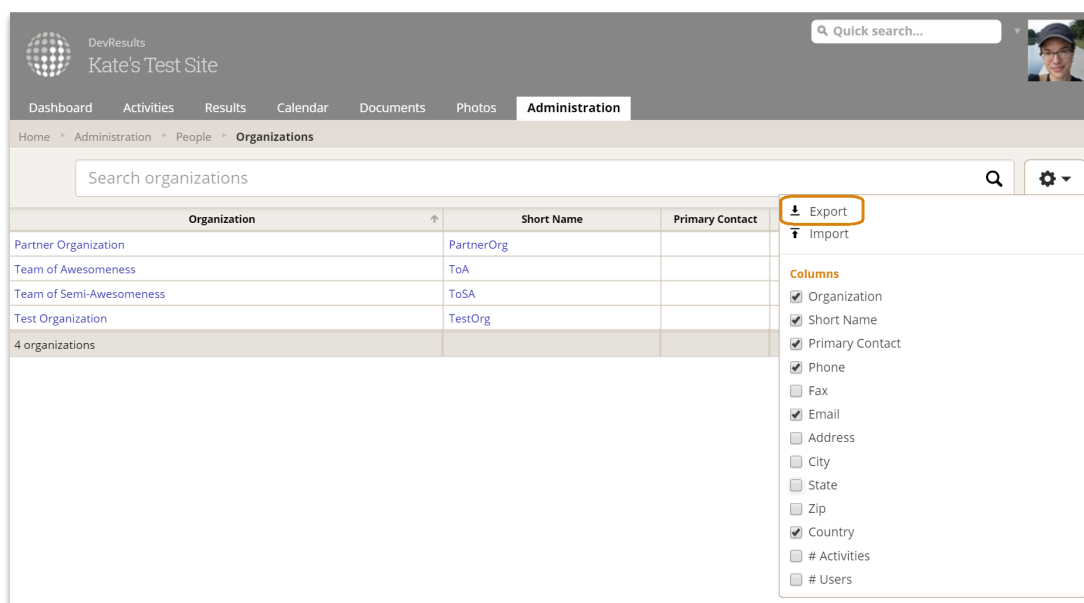
To create new organizations in bulk, first go to **Administration->Organizations** to open the Organizations Index page.

On this page, use the gear button in the upper right corner to select the columns you want to use:



Organization	Short Name	Primary Contact	Phone	Email	# Activities	# Users
Partner Organization	PartnerOrg				1	1
Team of Awesomeness	ToA				2	1
Team of Semi-Awesomeness	ToSA				1	1
Test Organization	TestOrg				2	
4 organizations						

Once you have the columns you'd like, click the gear button and select "Export" to get an Excel template of the displayed existing organizations:



You can delete all the rows from the export, but it's not necessary. Add the rows for your new organizations at the bottom with a **blank** organizationID:

	A	B	C	D	E	F	G	
1	organizationID	Organization	Short Name	Primary Contact	Phone	Email	Country	
2	27071	Partner Organization	PartnerOrg				US	
3	27068	Team of Awesomeness	ToA					
4	27069	Team of Semi-Awesomeness	ToSA					
5	27070	Test Organization	TestOrg				US	
6		Mandell Associates	MA				US	
7		Sage Inc.	Sage				US	
8		Caudill Web	CW				US	
9								

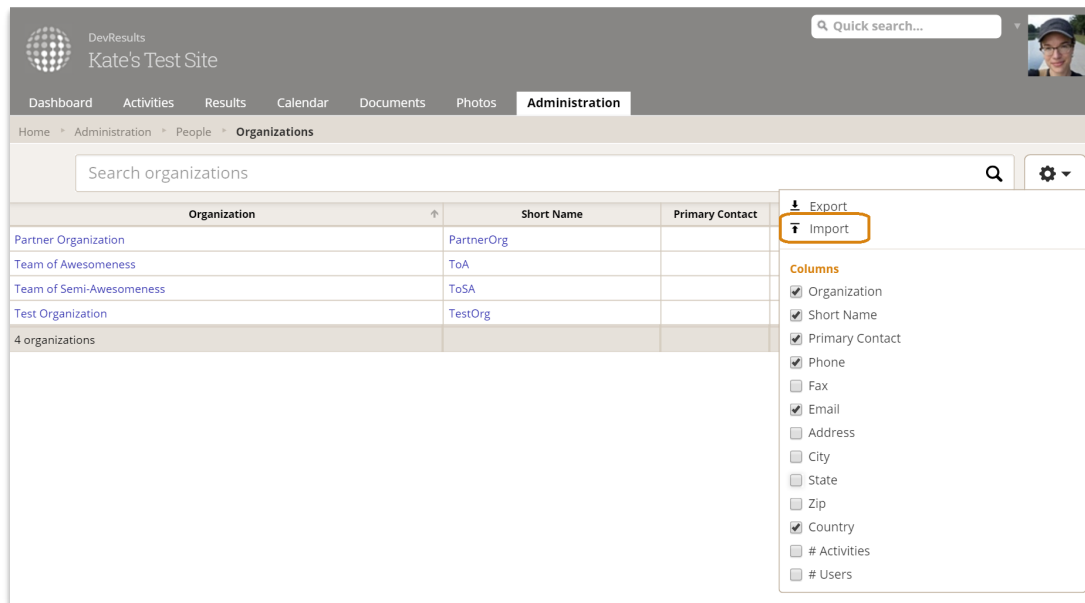
(The three rows highlighted with no organizationID are the new organizations this import will create.)

For new rows in the spreadsheet:

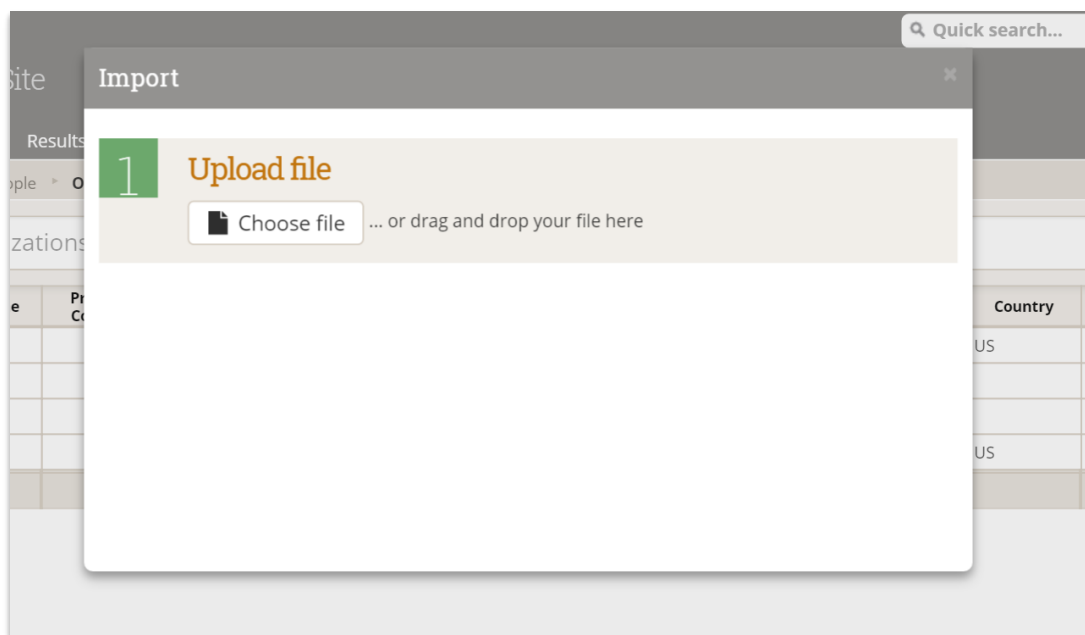
- For the **Country** column, use the two-letter country code as specified by the International Organization for Standardization (sample list available [here](#) ).
- **Organization** and **Short Name** are required; the other columns are optional.
- If you're uploading more than one **Tag** for a single organization, they should be in the same cell and separated by commas. e.g. **School,Primary**.
- You can only import Organization Tags that already exist in the system. To add new tags go to **Administration->Tags** and click on the **Organization Tags** tab.

Once you have your spreadsheet updated and saved with the new organizations you

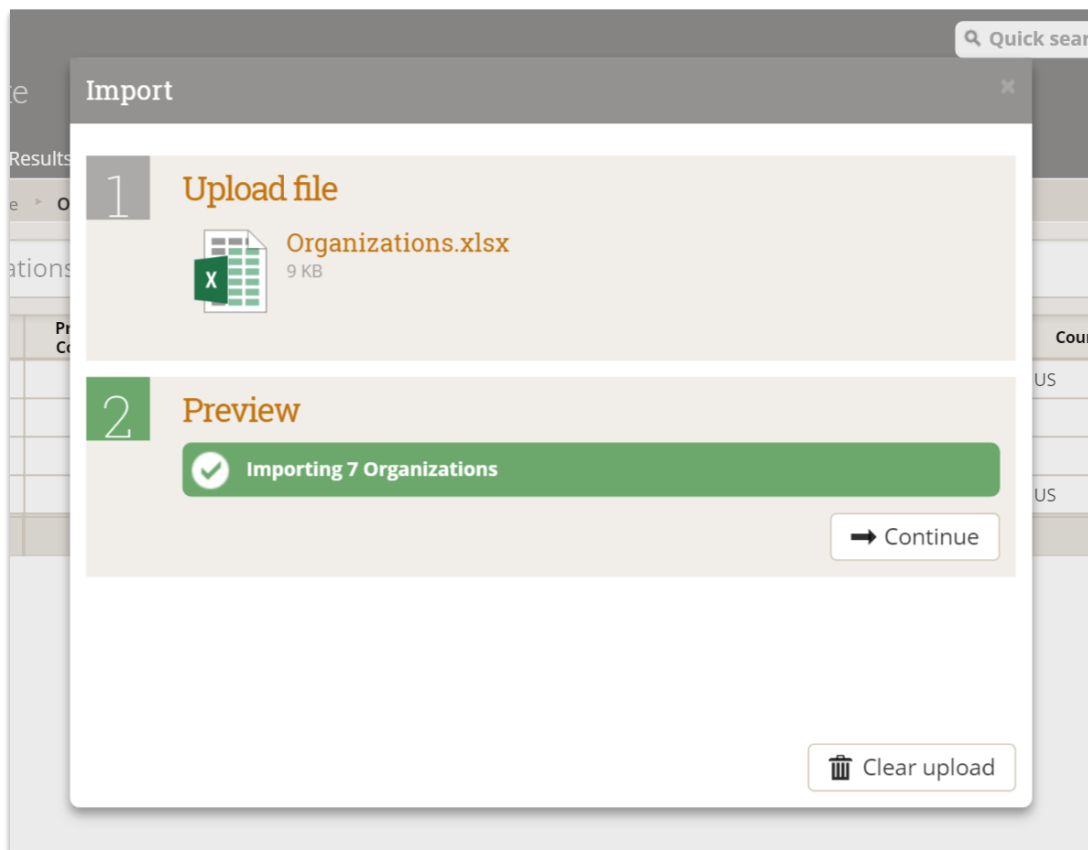
want to add, click the gear icon again and select **Import**:



This will open a pop-up window to walk you through the upload process:

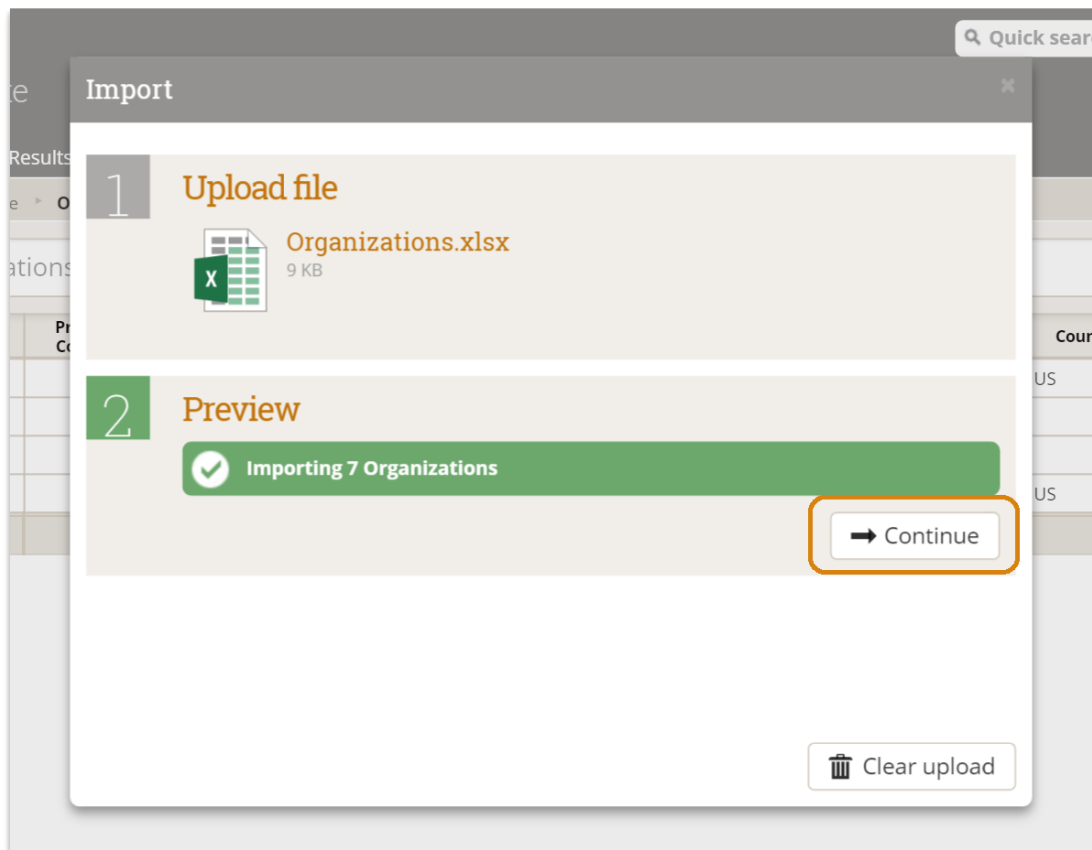


You can click the **Choose file** button to browse to the file or drag the file from your computer directly into this box and drop it here. The system will evaluate the spreadsheet for any invalid fields; it will warn you if it finds any problems with the sheet. If everything looks fine, you'll get a confirmation showing how many organizations it found and will import:

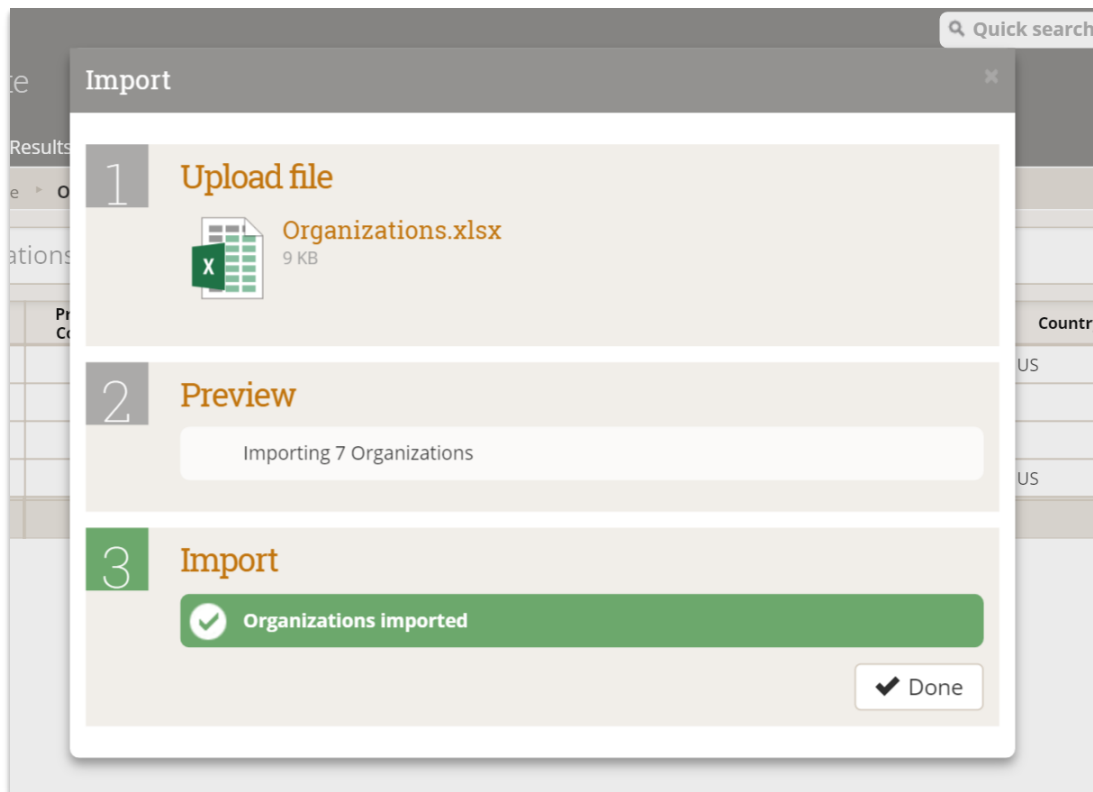


(In this case, I'm seeing 7 organizations because I left all of my existing organizations in my sheet. Since I didn't make any changes to them, this is fine.) If the number for import looks wrong to you or you get errors that you need to fix, click the **Clear upload** button to remove the file, go edit and save it again, and then restart the process.

Once everything looks good, click the **Continue** button to complete the import:



You'll get a confirmation message once the import is complete; click the Done button to close it.



Once you click Done, your Organizations Index page will refresh and you'll see your new organizations there!

## Editing Existing Organizations in Bulk

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You can also use this tool to complete bulk updates to existing organizations. To do so, follow the first few steps to download your Organizations Index into Excel. Then edit the spreadsheet that you downloaded--for example, to add a new Country to all Organizations, etc.

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