Batch Import

ProjectTeam.com gives you the ability to import an entire list into the system with our Batch Import feature.

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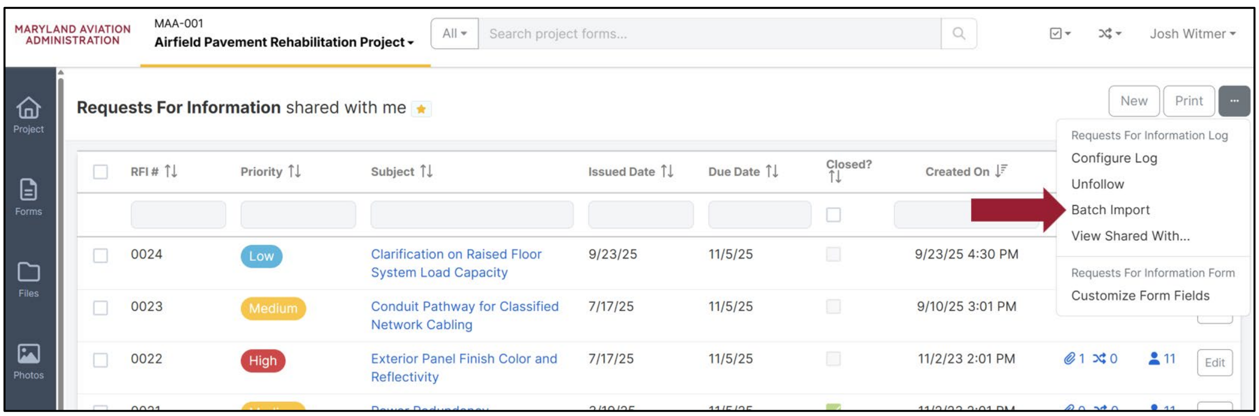
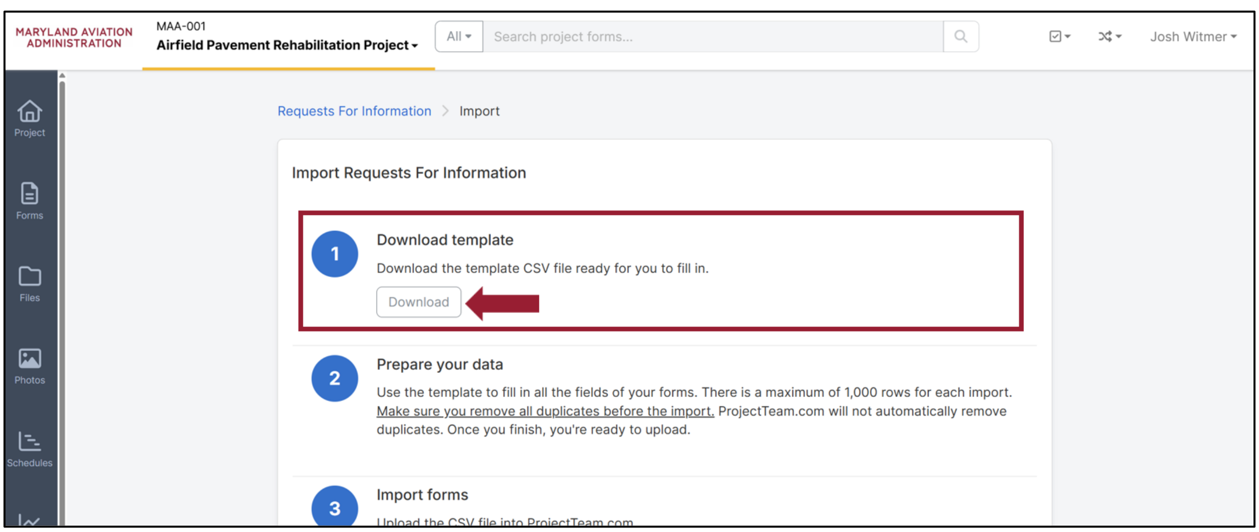
Batch Import Records

The Batch Import feature allows you to upload the entire list at one time.

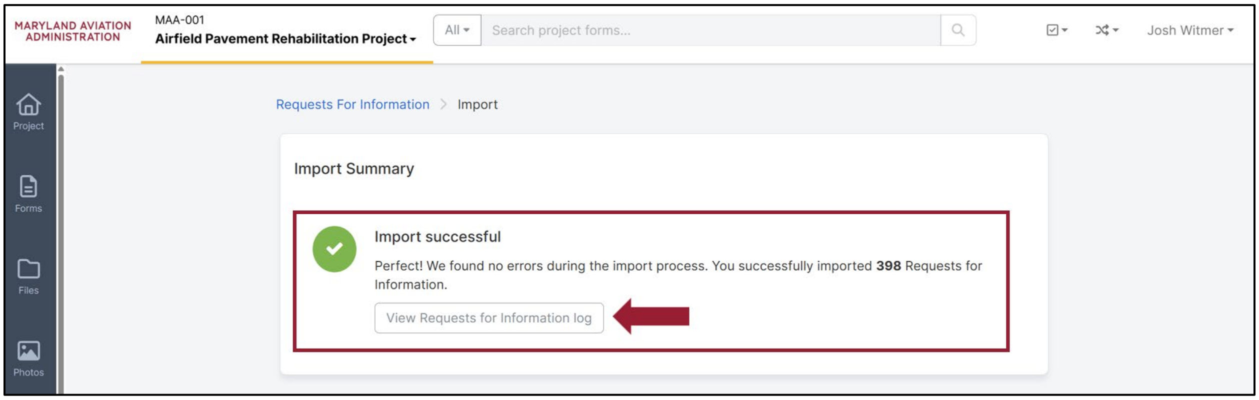
1. Open the Log View of any form type.
2. Click the ellipsis button to expand log options, choose “Batch Import”.



3. In the import instructions screen, click the “Download” button to download a pre-configured template. This will download a csv template for you to fill out.



4. In the downloaded template, enter the data you intend to import. Be careful not to change the headers of the CSV file, the data must match the format of the form in ProjectTeam.com to be valid. Save your file.
5. Back in ProjectTeam.com, click the “Upload” button and navigate to the file you just filled out. Once the import is complete, you will get a confirmation message, similar to the one shown below.



6. Click the “View Form Type Log” button to return to the log view. You have completed the batch import process.

Related Resources

For more information on how to batch import data or any other topic, visit our general support site at https://help.projectteam.com. For more specific instructions on working with MAA, visit https://www.projectteam.com/maa.

You can also contact support anytime at:

- Email: support@projectteam.com
- Phone: (703) 961-1007