

## Bulk Upload and Course Assignment



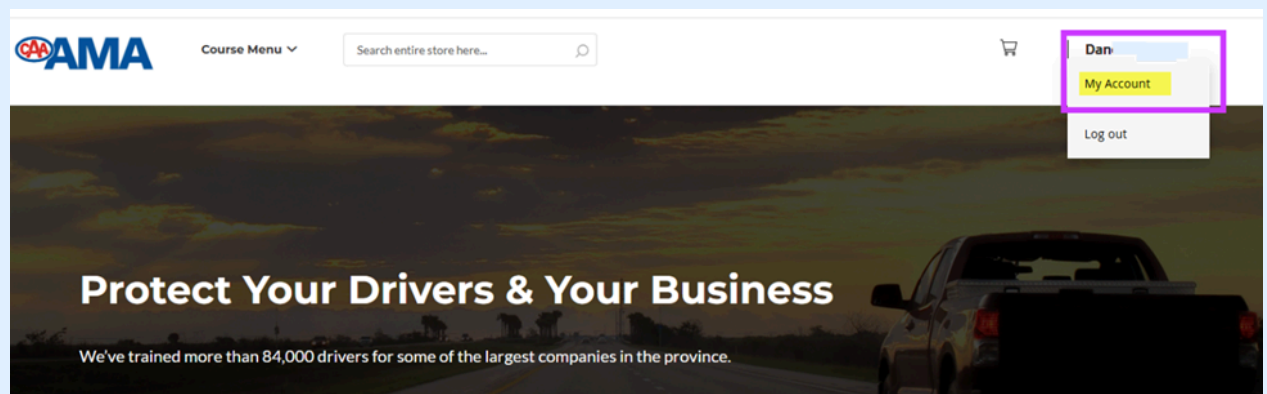
### Before You Begin

Make sure you've purchased courses on behalf of your users and that your account is set up with administrator access for your company.

## Bulk Upload of Customers

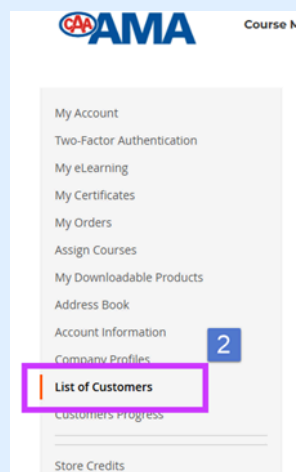
In the top-right corner, select **My Account**.

Step: 1



From the side panel, select **List of Customers** to open the customer management page.

Step: 2



Beneath the drop-down menu, select the **Upload Customers** link.

Step: 3

The screenshot shows the AMA website interface. On the left sidebar, the 'List of Customers' link is highlighted with a red box and labeled '2'. In the main content area, the 'List of Customers' page is displayed. The 'Please select action' dropdown menu is open, and the 'Upload customers' option is highlighted with a red box and labeled '3'.

#	Name	Company	Is Admin	Email	Actions
<input type="checkbox"/>	Tom Jones	Dane	No	holly@ama.ab.ca	Edit
<input type="checkbox"/>	Donna Sommers	Dane	No	lorie@ama.ab.ca	Edit
<input type="checkbox"/>	Betty Violet	Dane	No	mini@ama.ab.ca	Edit
<input type="checkbox"/>	Bob Tester	Dane	No	bob@ama.ab.ca	Edit

Select **Download Sample File** to obtain the correct CSV format. Fill in your employees' information using this template.

Step: 4

The screenshot shows the 'Upload Customers' page on the AMA website. The 'Download Sample File' link is highlighted with a red box. Below the link, there is a file upload area with a 'Choose File' button and an 'Upload' button.

## CVS Example

E.g.

	A	B	C	D
1	firstname	lastname	email	company_name
2	Dan	Test1	<a href="mailto:102025@gmail.com">102025@gmail.com</a>	Dane
3	Dan	Test2	<a href="mailto:0102025@gmail.com">0102025@gmail.com</a>	Dane
4	Dan	Test3	<a href="mailto:00102025@gmail.com">00102025@gmail.com</a>	Dane
5				

Select **Choose File** to upload your completed CSV, then select **Upload**.

Step: 5

The screenshot shows the 'Upload Customers' page on the AMA website. The 'Choose File' button is highlighted with a red box and labeled '5'. The 'Upload' button is highlighted with a red box and labeled '6'.



### Note

Once uploaded, newly registered customers will receive an email prompting them to create their accounts and set their passwords.

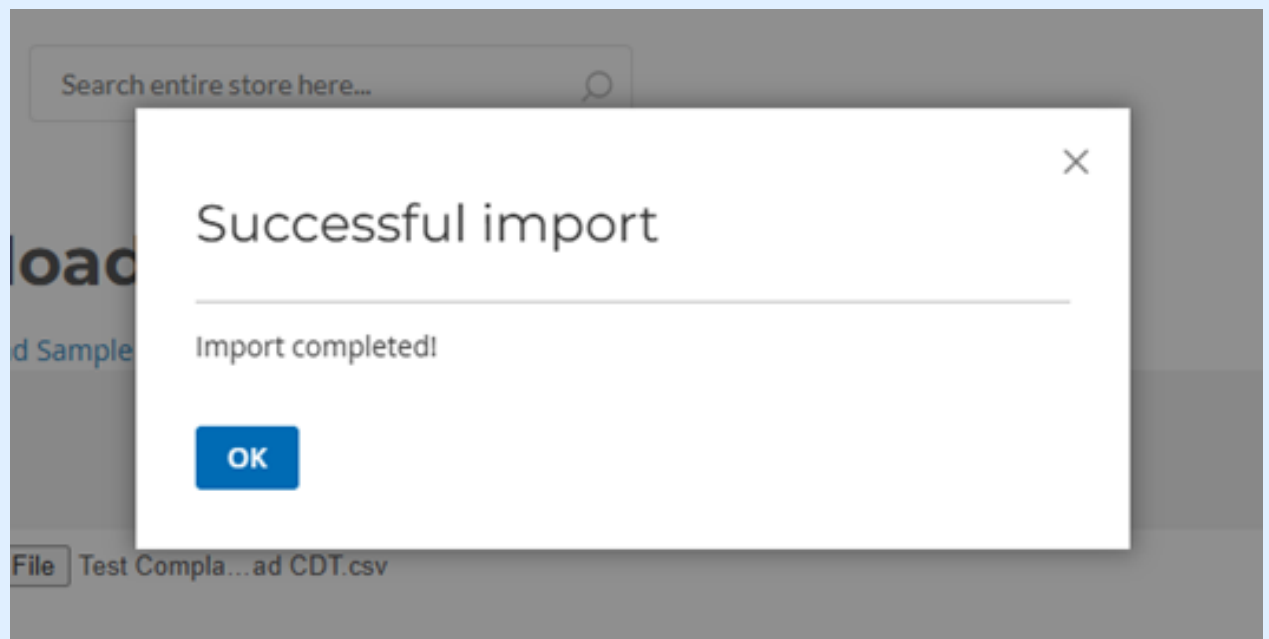


### Important

If your CSV includes existing customers, an error message will indicate duplicate entries. However, any new customers will still be added successfully.

When the confirmation pop-up appears, select **OK** to return to the **List of Customers** page, now updated with your new entries.

Step: 6



## Assigning Courses to Users

Select **Assign Courses**.

Step: 1

**AMA** Course Menu Search entire store here... Dan

**List of Customers**

Please select action  
Upload customers  
Select All / Unselect all

#	Name	Company	Is Admin	Email	Actions
<input type="checkbox"/>	Tom Jones	Dane	No	holly@ama.ab.ca	Edit
<input type="checkbox"/>	Donna Sommers	Dane	No	lorie@ama.ab.ca	Edit
<input type="checkbox"/>	Betty Violet	Dane	No	miri@ama.ab.ca	Edit
<input type="checkbox"/>	Bob Tester	Dane	No	bob.test@ama.ab.ca	Edit
<input type="checkbox"/>	Dan Test1	Dane	No	102025@gmail.com	Edit
<input type="checkbox"/>	Dan Test2	Dane	No	0102025@gmail.com	Edit
<input type="checkbox"/>	Dan Test3	Dane	No	0102025@gmail.com	Edit

My Account  
Two-Factor Authentication  
My eLearning  
My Certificates  
My Orders  
**Assign Courses**  
My Downloadable Products  
Address Book  
Account Information  
Company Profiles  
**List of Customers**  
Customers Progress  
Store Credits  
Account Balance

Step: 2 From the drop-down menu, select the course(s) you wish to assign.



## Note

Ensure seats are available, this confirms you've purchased the course on behalf of users.

Then select the **Student**, **Program** and **Pick up location**.

Step: 3

Select the **Company** from which you want to choose enrollees.

Step: 4

Step: 5 Select the **User(s)** to be assigned to the course.

Select **Assign** to complete the enrollment.

Step: 6

CAA  
AMA

Course Menu

Search entire store here...

🛒

Dan

My Account  
Two-Factor Authentication  
My eLearning  
My Certificates  
My Orders  
**Assign Courses**  
My Downloadable Products  
Address Book  
Account Information  
Company Profiles  
List of Customers  
Customers Progress  
  
Store Credits  
Account Balance  
My Subscriptions

Assign Courses

Select Course to Assign Learners

Aggressive Driving - Online Course - Order #0000001594

Current seats available: 1 of 2

Current Assigned Learners

• Courtney TEST (courtney@ama.ab.ca)

Assign a Company

Individual Assignment

Company

Dan

Select All / Deselect All

☒ Dan

☒ Tom Jones (holly@ama.ab.ca)

☒ Donna Sommers (lorie@ama.ab.ca)

☒ Betty Violet (miri@ama.ab.ca)

☒ Bob Tester (bob.test@ama.ab.ca)

☒ Dan Test1 (+102025@gmail.com)

☒ Dan Test2 (+0102025@gmail.com)

☒ Dan Test3 (+00102025@gmail.com)

Assign

11

Recently Ordered

☐ Aggressive Driving - Online Course

Add to Cart

View All

**Success**

A confirmation message will appear once the employee has been successfully enrolled.

Assign

Select Course

Aggressive Driving

Current seats available

Search entire store here...

Assign

11

Assign a Company

Individual Assignment

Company

Dan

Select All / Deselect All

☒ Dan

☒ Tom Jones (holly@ama.ab.ca)

☒ Donna Sommers (lorie@ama.ab.ca)

☒ Betty Violet (miri@ama.ab.ca)

☒ Bob Tester (bob.test@ama.ab.ca)

☒ Dan Test1 (+102025@gmail.com)

☒ Dan Test2 (+0102025@gmail.com)

☒ Dan Test3 (+00102025@gmail.com)

Assign

11

Recently Ordered

☐ Aggressive Driving - Online Course

Add to Cart

View All

Congratulations

Next customer(s) are successfully enrolled:

+00102025@gmail.com

OK

⚠️

There are no left seats available. You can purchase new ones [here](#)