

Bulk Upload and Course Assignment

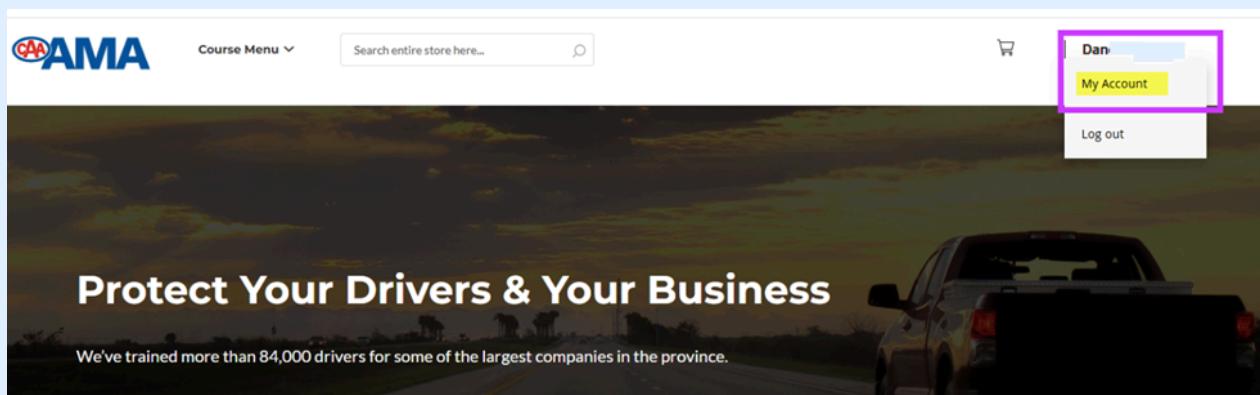


Before You Begin

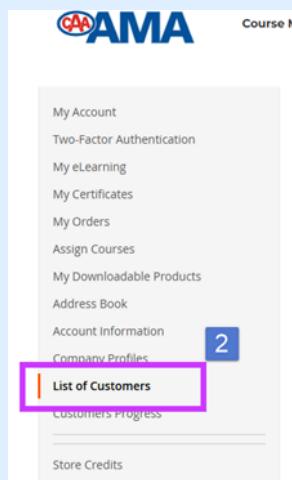
Make sure you've purchased courses on behalf of your users and that your account is set up with administrator access for your company.

Bulk Upload of Customers

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

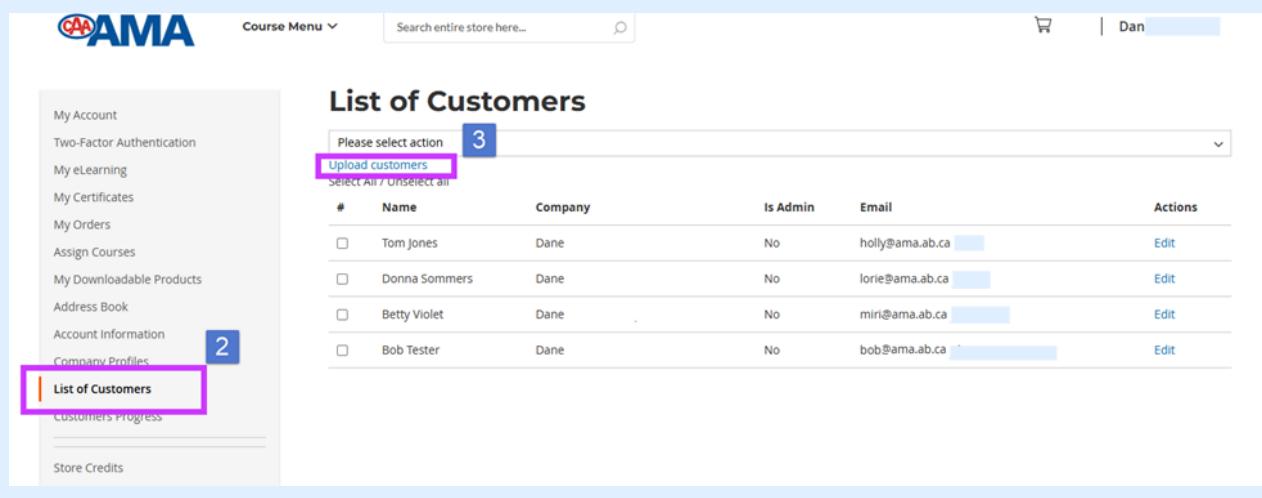


From the side panel, select **List of Customers** to open the customer management page.



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

Step: 3



List of Customers

Please select action 3

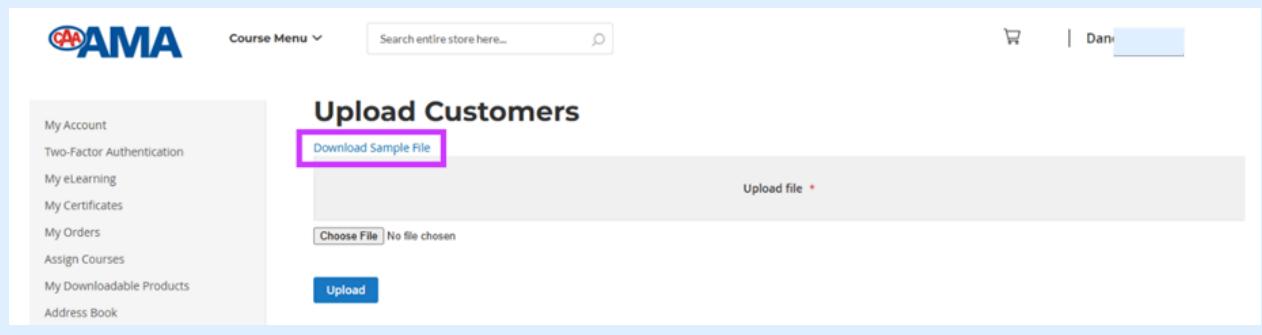
Upload customers

Select All / Unselect all

#	Name	Company	Is Admin	Email	Actions
1	Tom Jones	Dane	No	holly@ama.ab.ca	Edit
2	Donna Sommers	Dane	No	lorie@ama.ab.ca	Edit
3	Betty Violet	Dane	No	miri@ama.ab.ca	Edit
4	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



Upload Customers

Download Sample File 4

Upload file *

Choose File No file chosen 5

Upload 6

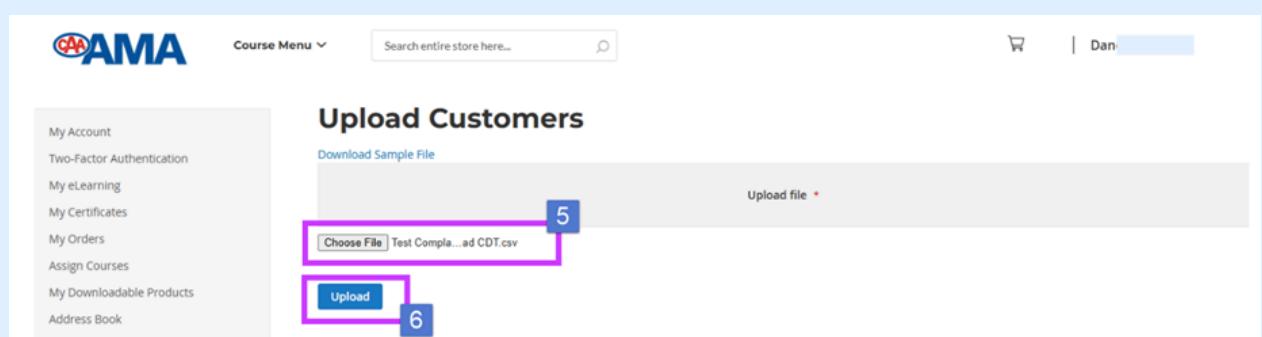
CSV Example

E.g.

	A	B	C	D
1	firstname	lastname	email	company_name
2	Dan	Test1	102025@gmail.com	Dane
3	Dan	Test2	0102025@gmail.com	Dane
4	Dan	Test3	00102025@gmail.com	Dane
5				

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

Step: 5



Upload Customers

Download Sample File

Upload file *

Choose File Test Complia...ad CDT.csv 5

Upload 6



Note

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

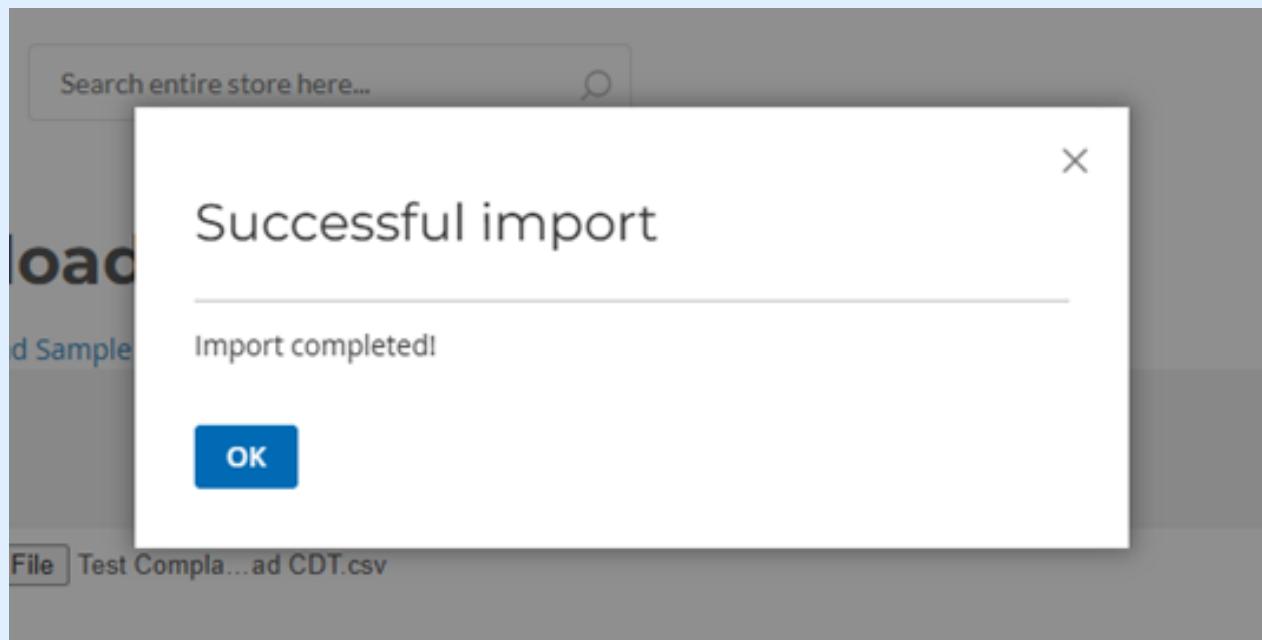


Important

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

#	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.tester@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	00102025@gmail.com	Edit

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

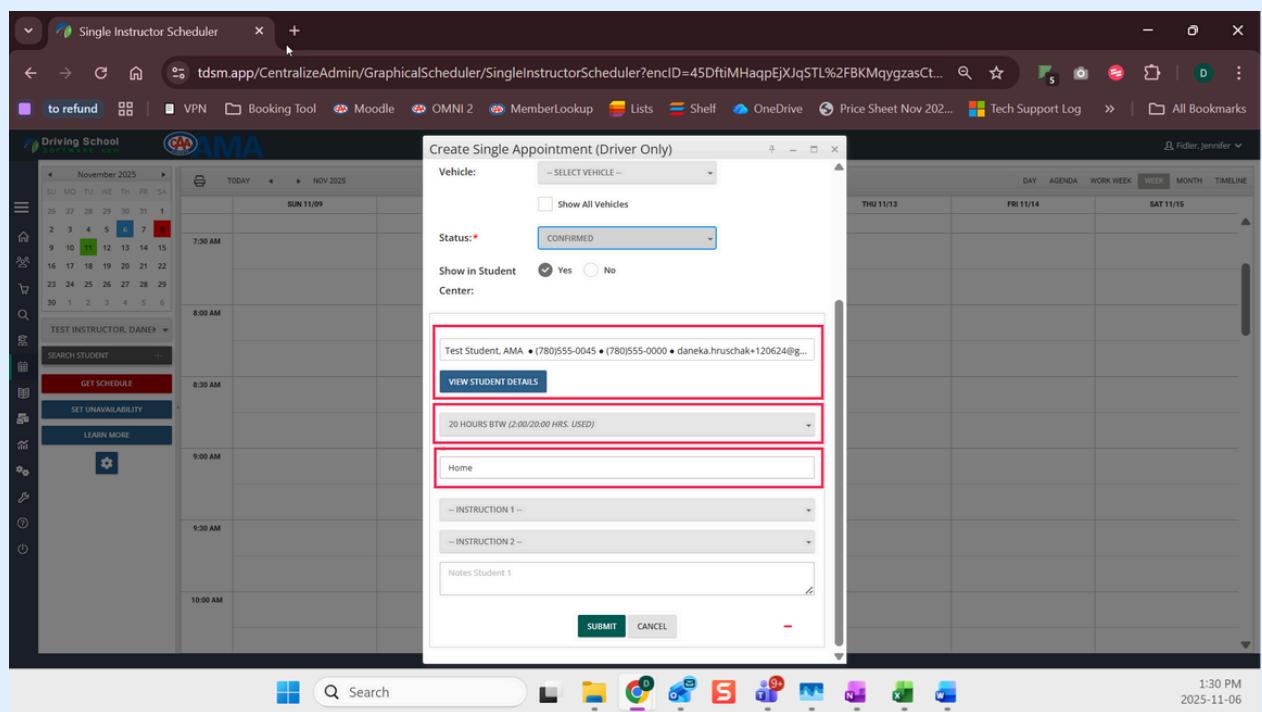


Note

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

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

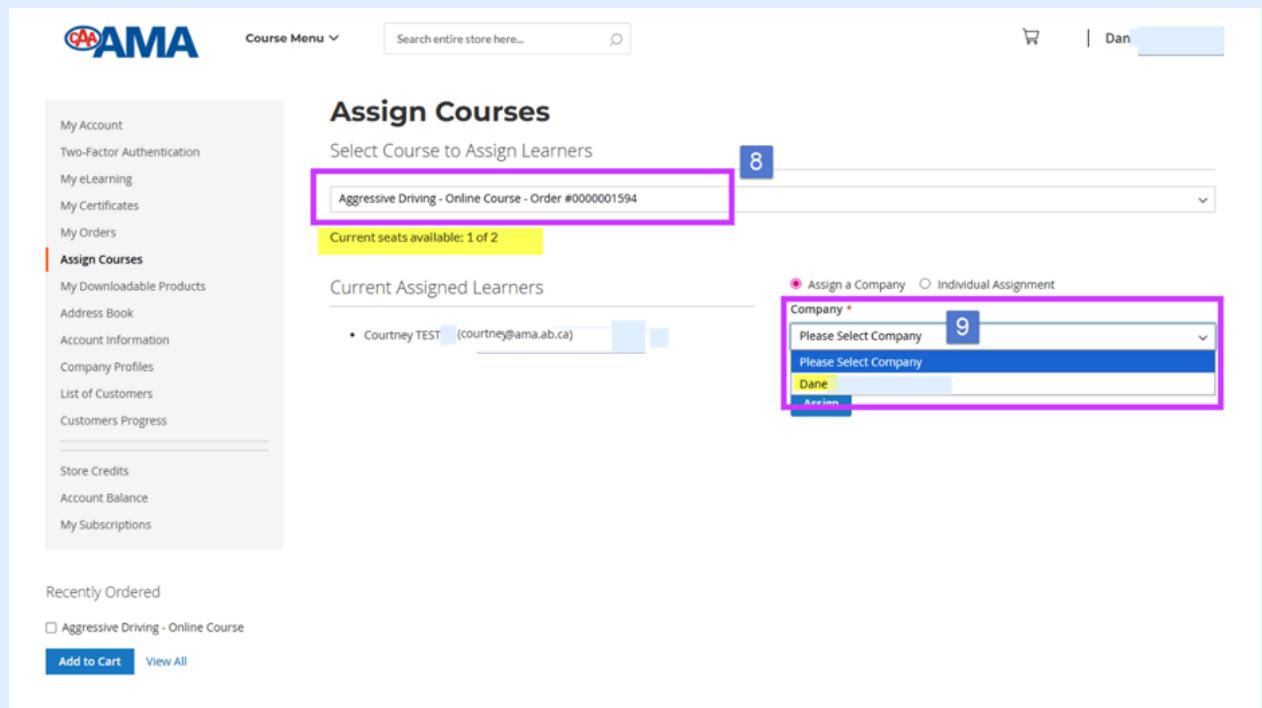
Step: 3



The screenshot shows a Windows desktop with a browser window open to the 'Single Instructor Scheduler' on the 'Driving School' website. A modal dialog box is displayed for 'Create Single Appointment (Driver Only)'. The 'VIEW STUDENT DETAILS' section and the 'Center' dropdown are highlighted with red boxes. The 'SUBMIT' button is at the bottom of the dialog.

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

Step: 4

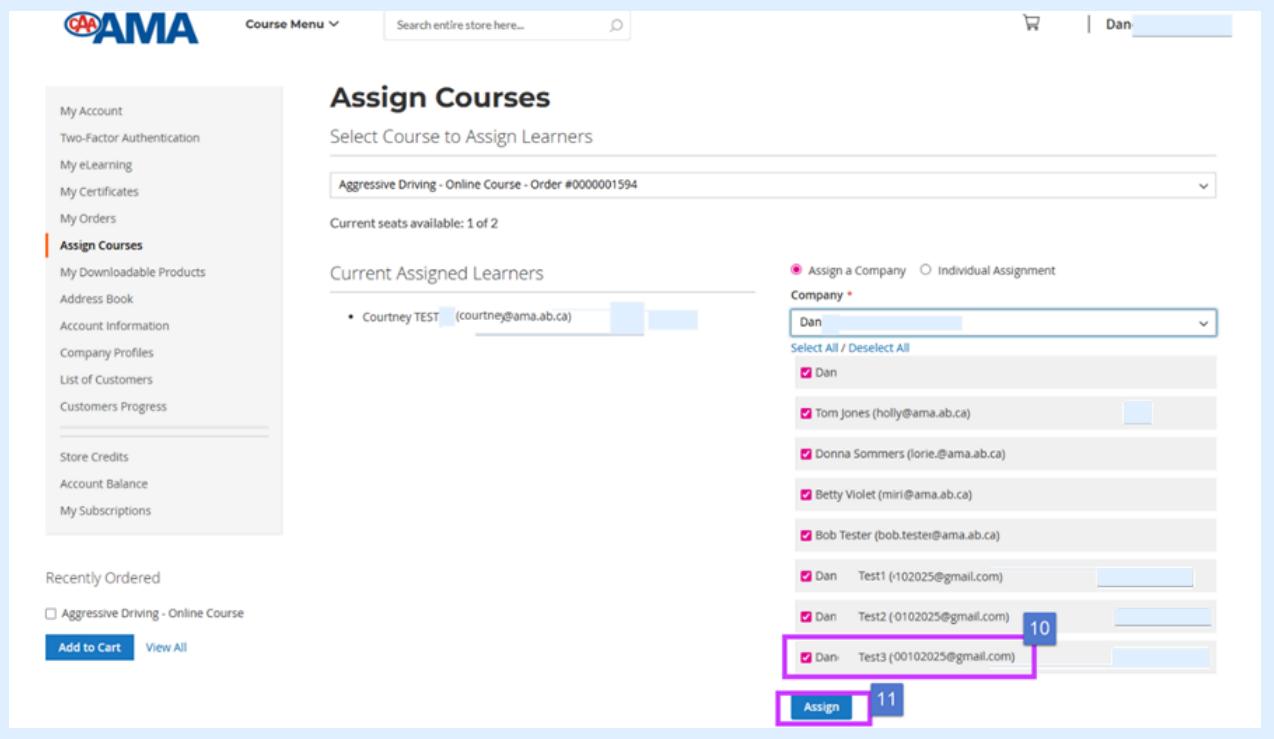


The screenshot shows the 'Assign Courses' page on the AMA website. A course is selected in a dropdown menu (highlighted with a yellow box). The 'Current Assigned Learners' section shows a learner named Courtney TEST. A dropdown menu for 'Company' is open, showing options like 'Please Select Company' and 'Dane' (highlighted with a red box). A blue box labeled '8' is positioned above the dropdown menu.

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

Select **Assign** to complete the enrollment.

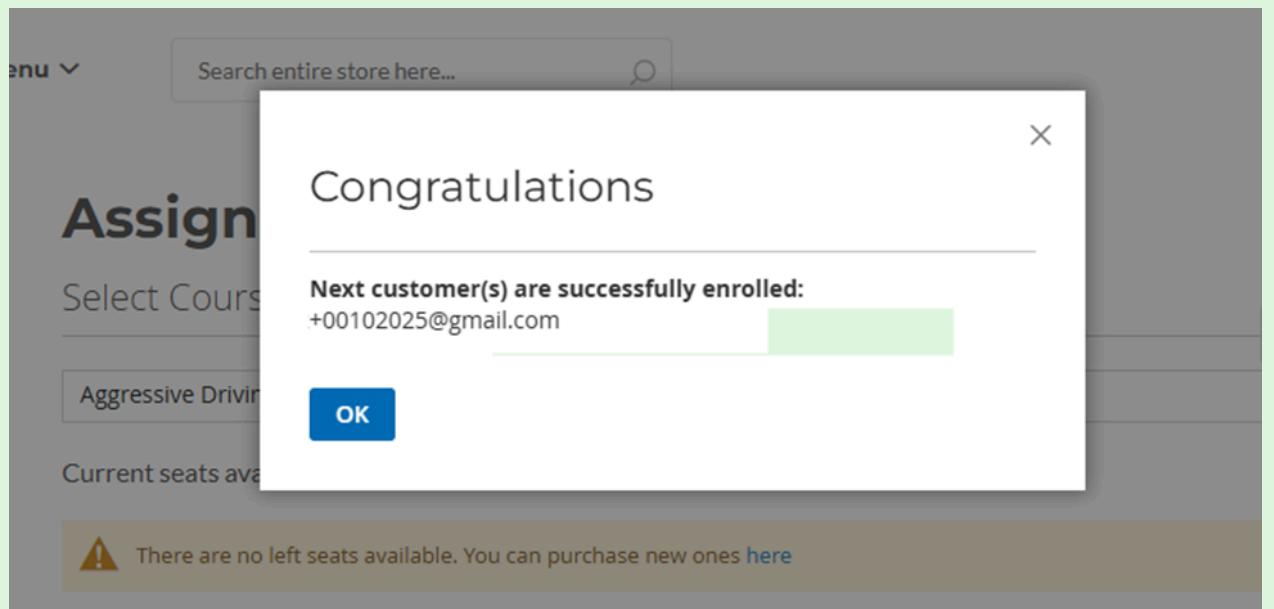
Step: 6



The screenshot shows the 'Assign Courses' page. On the left, a sidebar lists 'My Account', 'Two-Factor Authentication', 'My eLearning', 'My Certificates', 'My Orders', 'Assign Courses' (which is selected and highlighted in orange), 'My Downloadable Products', 'Address Book', 'Account Information', 'Company Profiles', 'List of Customers', 'Customers Progress', 'Store Credits', 'Account Balance', and 'My Subscriptions'. Under 'Assign Courses', it shows 'Recently Ordered' with an option to 'Add to Cart' or 'View All'. The main content area is titled 'Assign Courses' and 'Select Course to Assign Learners'. It lists 'Aggressive Driving - Online Course - Order #0000001594' with 'Current seats available: 1 of 2'. Below this, 'Current Assigned Learners' is listed with 'Courtney TEST (courtney@ama.ab.ca)'. To the right, there are two radio buttons: 'Assign a Company' (selected) and 'Individual Assignment'. A dropdown menu for 'Company' is set to 'Dan'. Below it, a list of learners is shown with checkboxes: 'Dan' (checked), 'Tom Jones (holly@ama.ab.ca)' (checked), 'Donna Sommers (lorie@ama.ab.ca)' (checked), 'Betty Violet (miri@ama.ab.ca)' (checked), 'Bob Tester (bob.tester@ama.ab.ca)' (checked), 'Dan Test1 (102025@gmail.com)' (checked), 'Dan Test2 (0102025@gmail.com)' (checked), and 'Dan Test3 (00102025@gmail.com)' (checked). The last learner is highlighted with a purple box. At the bottom right, there are buttons for 'Assign' (highlighted with a blue box) and '11' (the total number of seats available).

Success

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



The screenshot shows a 'Congratulations' dialog box. It displays the message 'Next customer(s) are successfully enrolled: +00102025@gmail.com' in a green bar. At the bottom, there is an 'OK' button. The background shows the 'Assign Courses' page with a green checkmark icon on the left.