

Instructions to Import Multiple Certificate Holders to CSR24

This Process is useful to import a spreadsheet with cert holder information directly into CSR24, in order to avoid inputting each holder separately through the CSR24 system.

- Go into CSR-24
- Click the arrow next to **SEARCH** to input Client Name or Client Code
- Click **FIND** to search accounts
- Select the appropriate Account
- Click **HOLDERS** in the menu on the left
- Click **IMPORT** on the top of the screen
- Click **HELP** on the top right in order to download the Standard Cert Holder Template
 - **SAVE** this file as something recognizable.
 - In order to import a file, it must be an Excel spreadsheet and must have the columns exactly as shown in the Standard Cert Holder Template
- Open the Standard Cert Holder Template Excel sheet and input the information for all holders
 - By inputting information here, the process of creating a single holder multiple times is avoided.
 - AOIKey column is not required if this is a new record. The CSR24 system uses AOIKey to update existing holders. If a match cannot be found for first AOIKey, then Holder Name, a new record is added.
 - Input "StateProv" Column as the two-letter code, i.e. "NY" or "PA"
 - The "Attention1", "FaxNumb", and "Email" columns can be repeated up to three times if there are multiple recipients. Label the subsequent columns in the same manner, i.e. "Attention2" & "Attention3", "FaxNumb2" & "FaxNumb3", "Email2" & "Email3"
 - The Template already has these columns included
 - In the "Templates" column, list any templates that you want to be used with these holders
 - Your spreadsheet should look like the attached picture.
- After ensuring that all holders are represented on the Standard Cert Holder Template Excel sheet, **SAVE** the spreadsheet again.
- Return to CSR24
 - You should still be on the Import screen
- Click **BROWSE** and find the Standard Cert Holder Template Excel sheet that you just saved, then click **OPEN**
- Check the "Keep Embedded Carriage Returns" box - this will carry over indentation, line breaks, and line spacing to CSR24 exactly as they are in the import file
- Select the certificate templates that are allowed to be used to issue certificates for these Holders.
 - Press CTRL while clicking to select multiple templates, or press SHIFT while clicking to select a range of templates
 - This will not overwrite the templates you listed on the spreadsheet, it will only add to that list.
- To assign this group of holders to a specific location, click **SELECT LOCATION** and choose the desired location
- Click **IMPORT** at the top of the screen
- The Import Status screen should appear to tell you that the Import is complete. It will also show the Total Records, and then break that number down into Records Updated and Records Inserted.
- If you click **HOLDERS** in the left menu, the holders that were imported will be in the list of holders for the account.

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