Bulk Upload Users

Yellowbox Partner Dashboard, sidebar > **Users** > **+ Add users or cards** > **Import Users** (dashboard.yellowbox.app/users). Add many people at once from a spreadsheet, and optionally give each one a locker.

Before you start

- **Does your organisation use Sign in with Microsoft (or another company login)?** Then people should be given access by your IT team in Microsoft (Azure AD / Entra), not imported here. Accounts created by an import **cannot** use Sign in with Microsoft.
- You can import up to 5,000 people in one file.
- Nothing is saved until you click **Import** on the review screen, so you can upload, check and cancel as often as you like.

Template columns

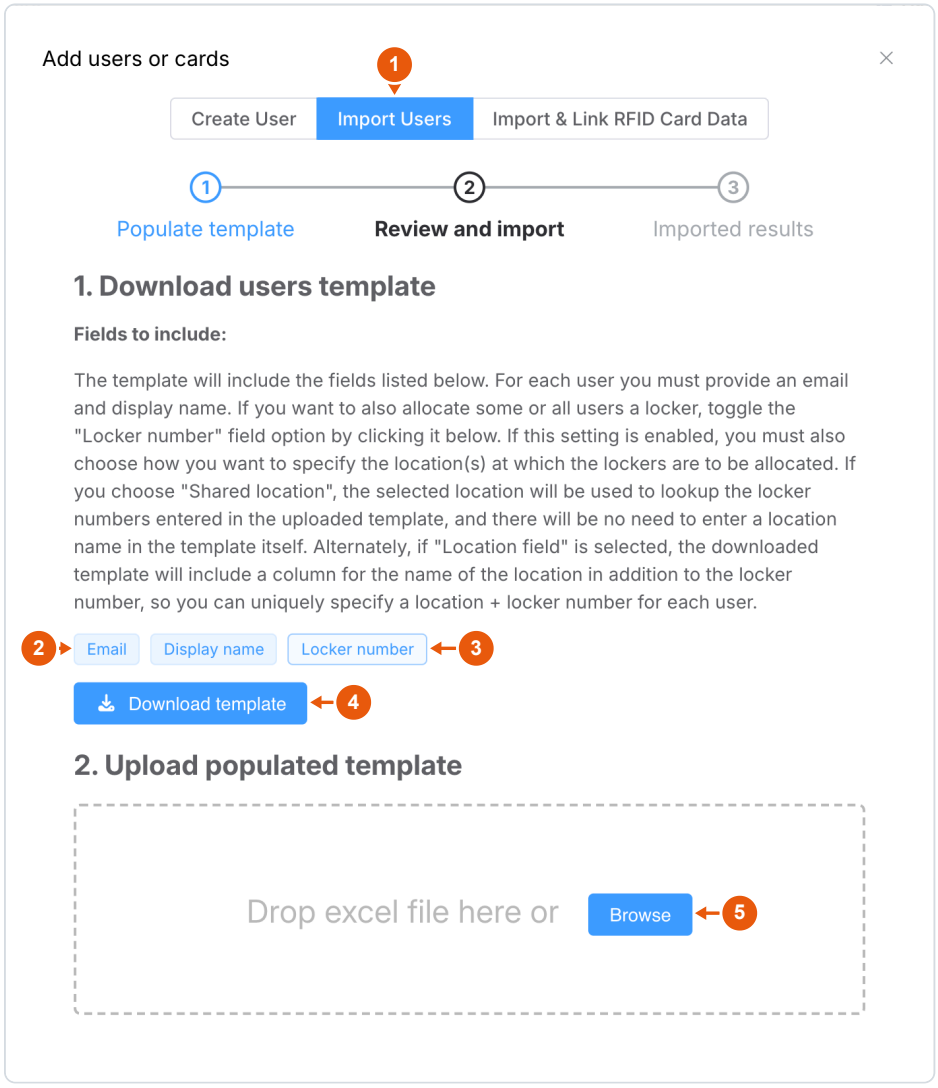
The spreadsheet you download in Step 1 has these columns:

Column	What to enter
Email	The person's work email (required). They sign in with this.
Display name	Their full name, as it should appear on bookings and in the history (required).
Locker No.	Only if you chose *Locker number*. The locker name exactly as it shows in the dashboard. Leave blank for people who do not need one.
Location	Only if you chose *Location field*. The location name exactly as it shows in the dashboard.

Keep the **Email** and **Display name** headings exactly as they are, or the upload is refused with *Uploaded file is not in template format*. The template has no example rows: start filling in from the first row under the headings.

Step 1: Download and fill in the template

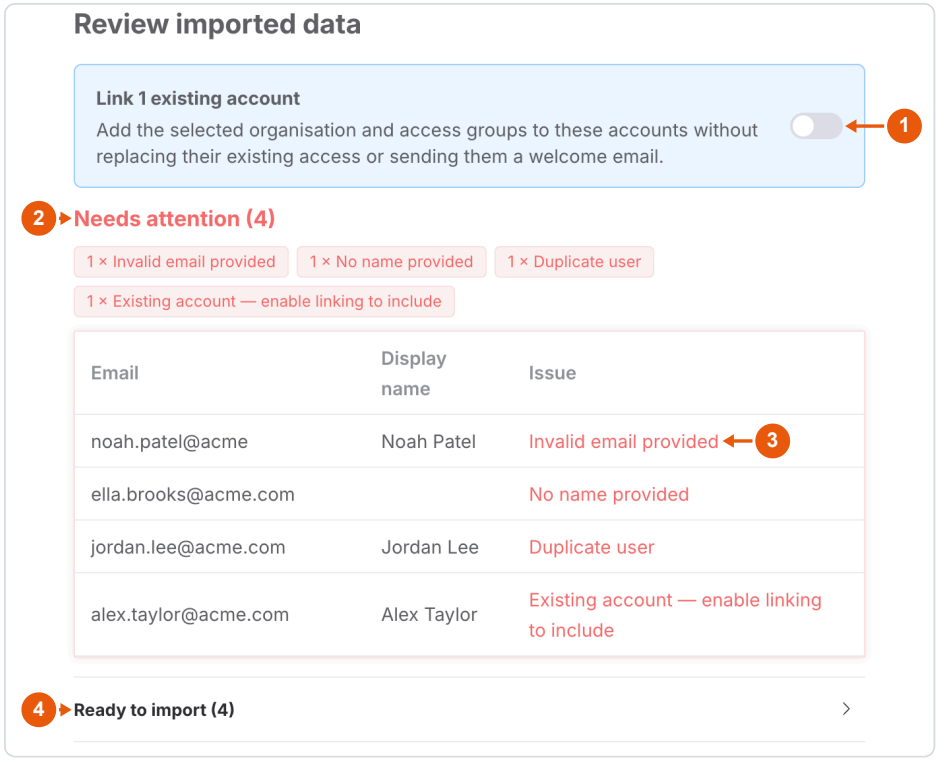
Open **Users**, click **+ Add users or cards** and choose the **Import Users** tab.



1. **Import Users** tab.
2. **Email** and **Display name** are always in the template.
3. **Locker number** (optional): click it to also give people a locker. Then choose **Shared location** (every locker is at one location you pick) or **Location field** (adds a Location column so each person can be at a different location).
4. **Download template** saves the spreadsheet. Fill in one row per person and save it as an Excel file.
5. Drop the filled-in file here, or click **Browse** to pick it.

Step 2: Check the review screen

After you upload, the dashboard checks every row and splits them into **Needs attention** and **Ready to import**.

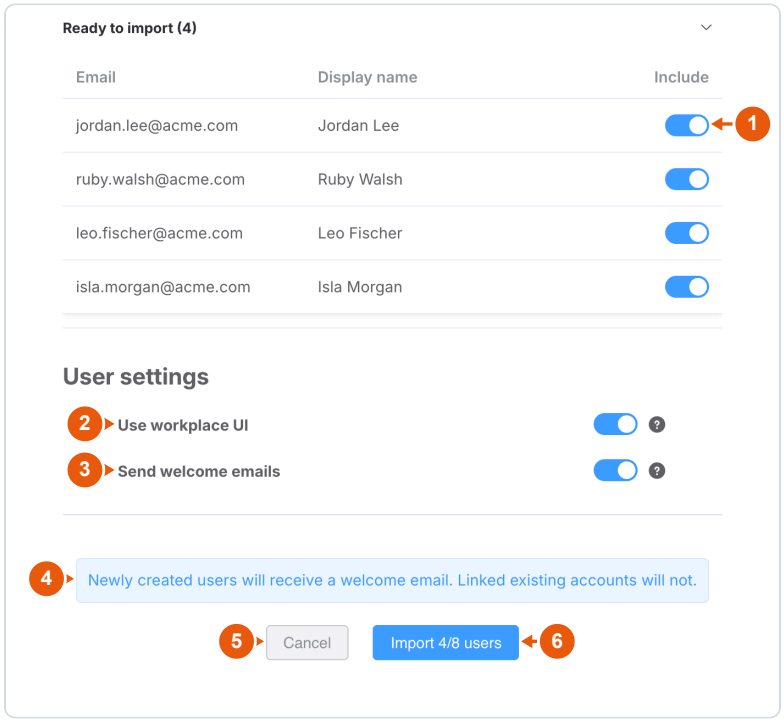


1. **Link existing accounts**: shows when some people in your file already have a Yellowbox account. Turn it on to add your organisation and access to their existing account (their other access stays, and they get no welcome email). Leave it off to skip them.
2. **Needs attention**: rows that will **not** be imported, with a count of each problem.
3. The **Issue** column says what is wrong with each row.
4. **Ready to import**: click to see the rows that will be imported.

Issue	What to do
No email provided / Invalid email provided	Fix the email in your spreadsheet (for example, a missing *.com*) and upload again.
No name provided	Add the person's name and upload again.
Duplicate user	The same email is in the file twice. Only the first row is kept; delete the extra row.
Existing account	The person already has an account. Turn on **Link existing accounts** to include them.
Locker problems	The location or locker name does not match the dashboard, the locker is not free, or the same locker is given to two people. Check the spelling against the dashboard and upload again.

Step 3: Choose the settings and import

Scroll down the review screen.



1. **Include**: turn off any row you do not want to import this time.
2. **Use workplace UI**: leave on so people can use the Yellowbox workplace app.
3. **Send welcome emails**: on sends each new person an email telling them their account is ready. Turn it off if you would rather tell them yourself. If it is greyed out, welcome emails for imports are turned off in **Configuration** > **Emails**.
4. A reminder of who will get an email: new people do, linked existing accounts do not.
5. **Cancel** closes without saving anything.
6. **Import** creates the accounts. The button shows how many rows will be imported out of the total in your file.

If your organisation or access group is not shown, you only manage one, and people are added to it automatically. If you manage more than one, the review screen asks which ones the new people should join.

Step 4: Check the results

The last screen, **Check import results**, lists every row with its status:

- **Success**: the account was created.
- **Linked**: an existing account was given your access.
- **Skipped** or **Error**: not imported. Hover over it to see why.

If you included lockers, a green square means the locker was booked and a red one means it was not. Click **Close** when you are done. Fix any skipped rows and import just those again.

Screenshots use sample data.