9.6. Vendor Bulk Upload

By using this feature, you can onboard the multiple agents in bulk.

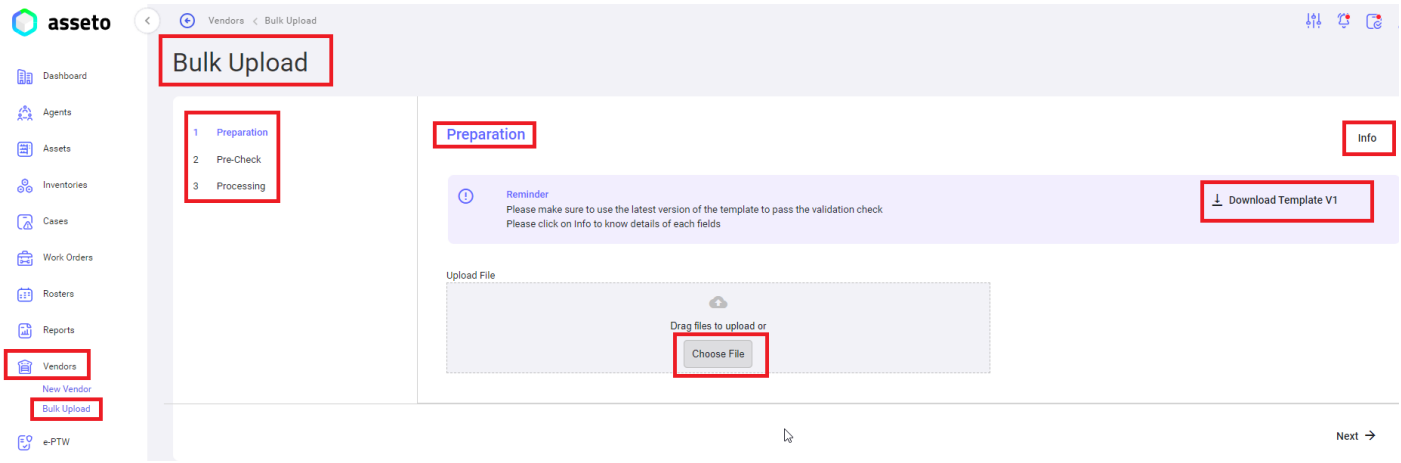
Left Menu -> Vendor -> Bulk Upload

It has 3 sections, those are

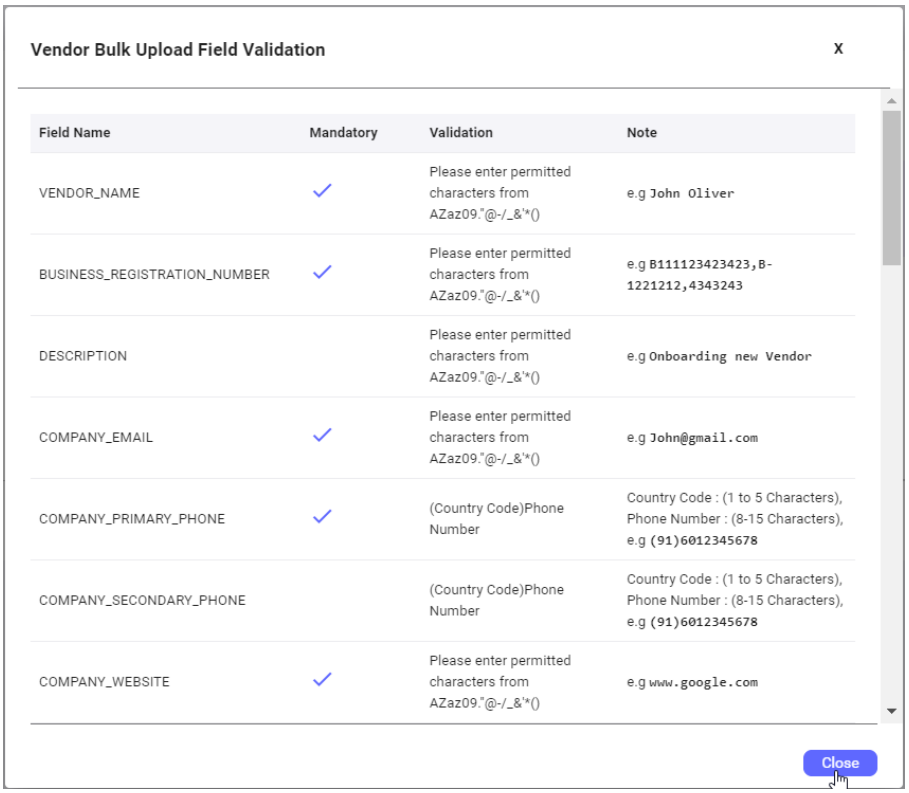
1. **Preparation**: To download the template.

2. **Precheck**: validation check: To check for any errors in the uploaded sheet.

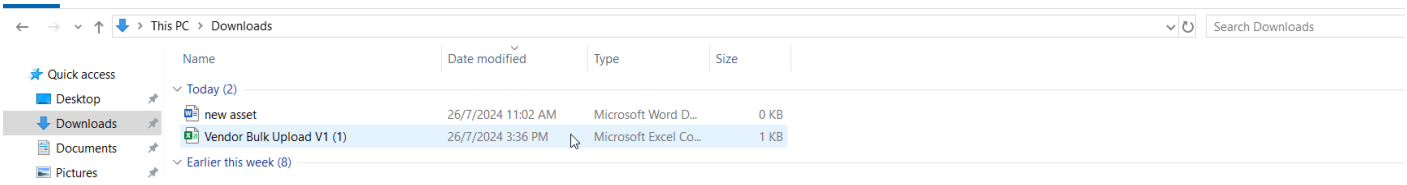
3. **Processing**: To view the progress on the bulk upload process.



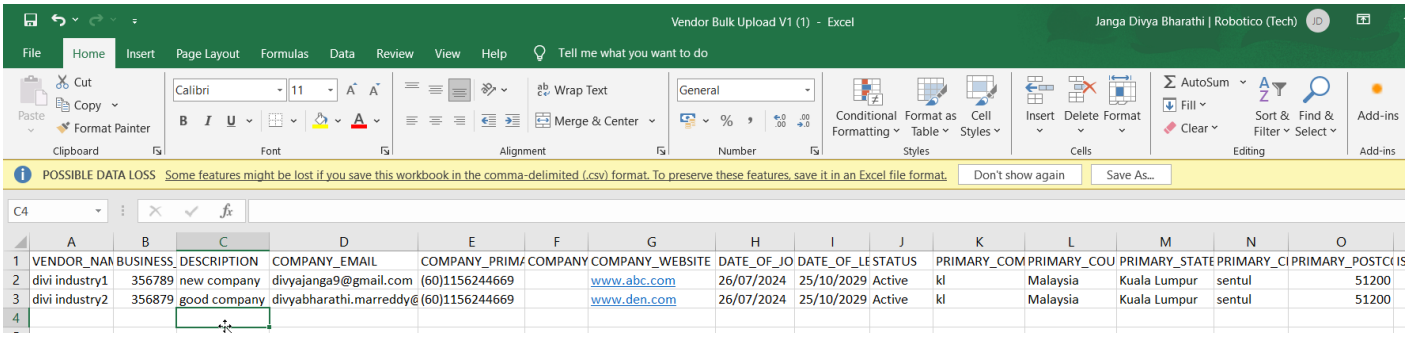
Info button: users can view the fields validation rules to fill the values in csv file accordingly.



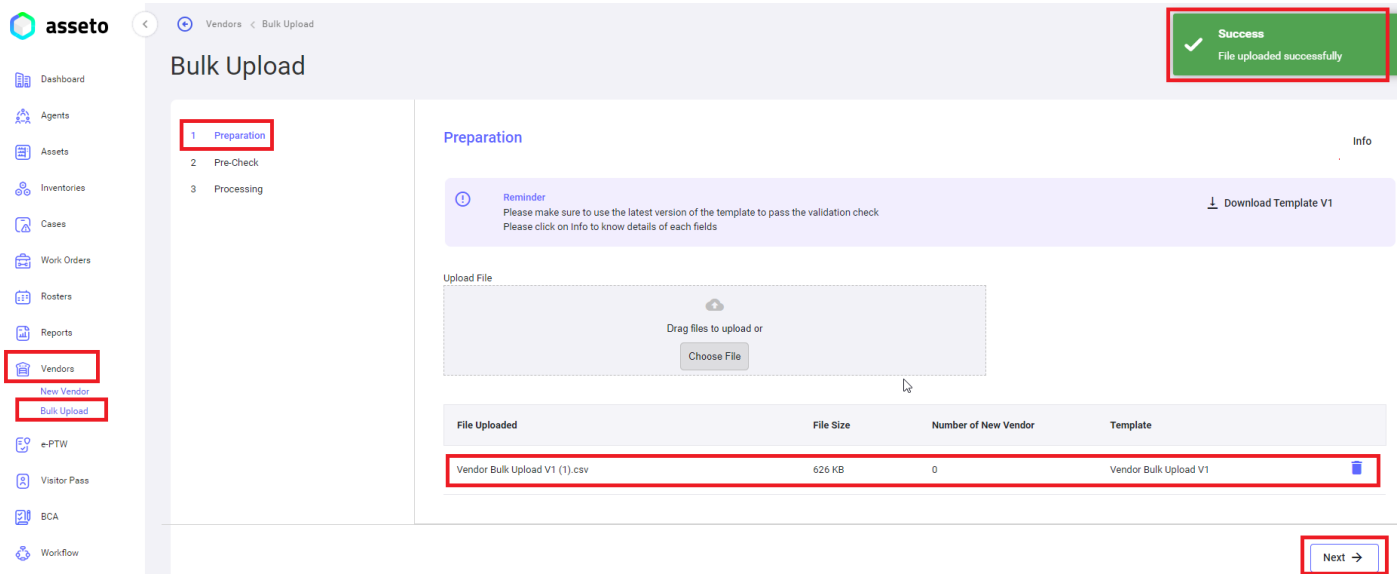
1. <u>Preparation:</u> click on download template button to download csv file will be available in your local pc downloads folder as shown by following screenshot.



Fill the data on the downloaded csv file for all vendors to be onboarding using bulk upload.

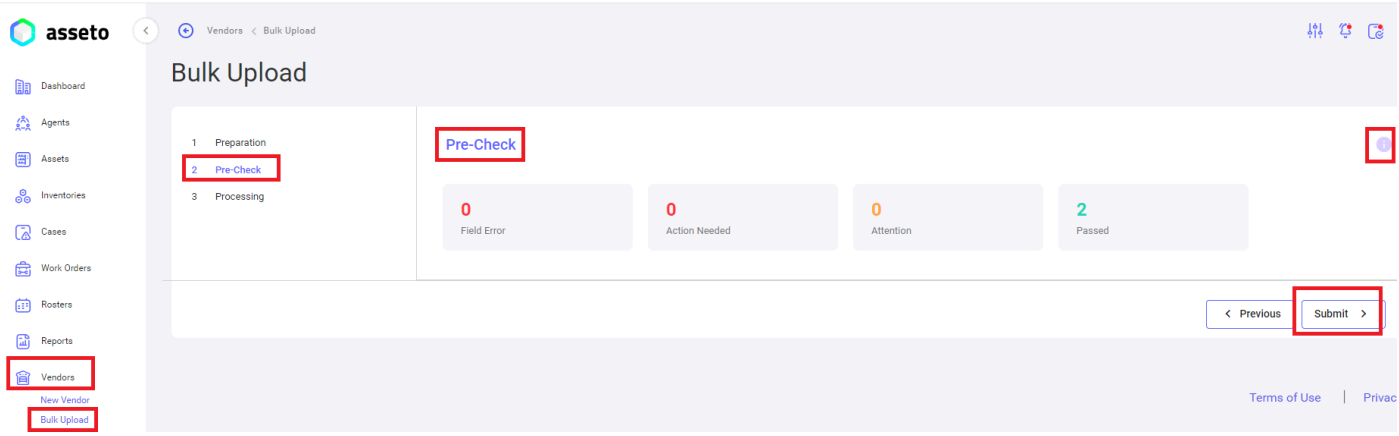


Upload the file by clicking on choose file button on the bulk upload page.

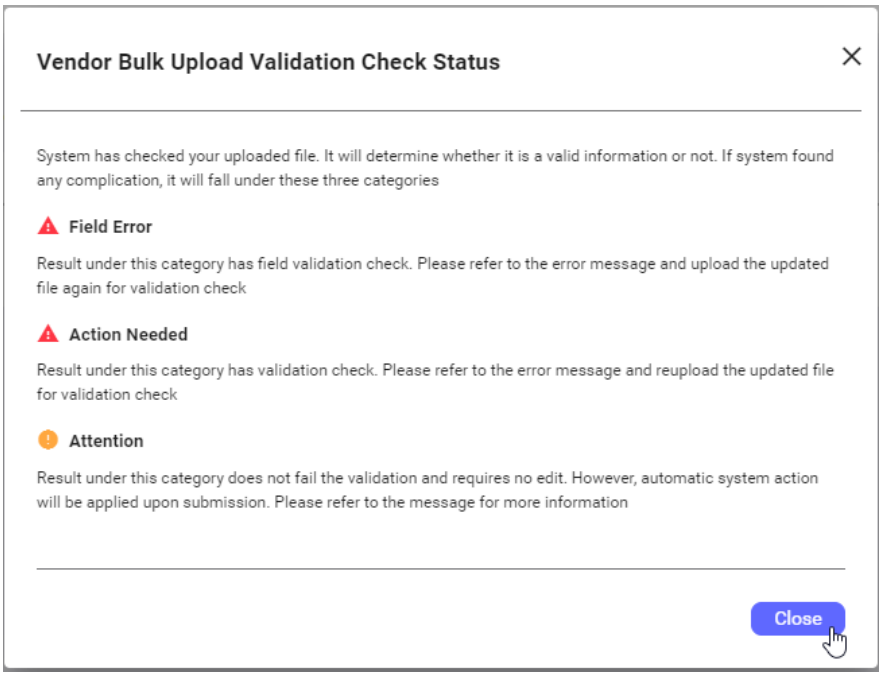


After uploading the csv file ‘Next’ button will be enabled, you can click on next button the system will navigate to validation check page.

2. Precheck/validation check: if your uploaded file having any errors will be display here, user will not be able to move to next stage unless those errors are corrected, submit button enabled (as shown by below screenshot) if no errors in your csv file.

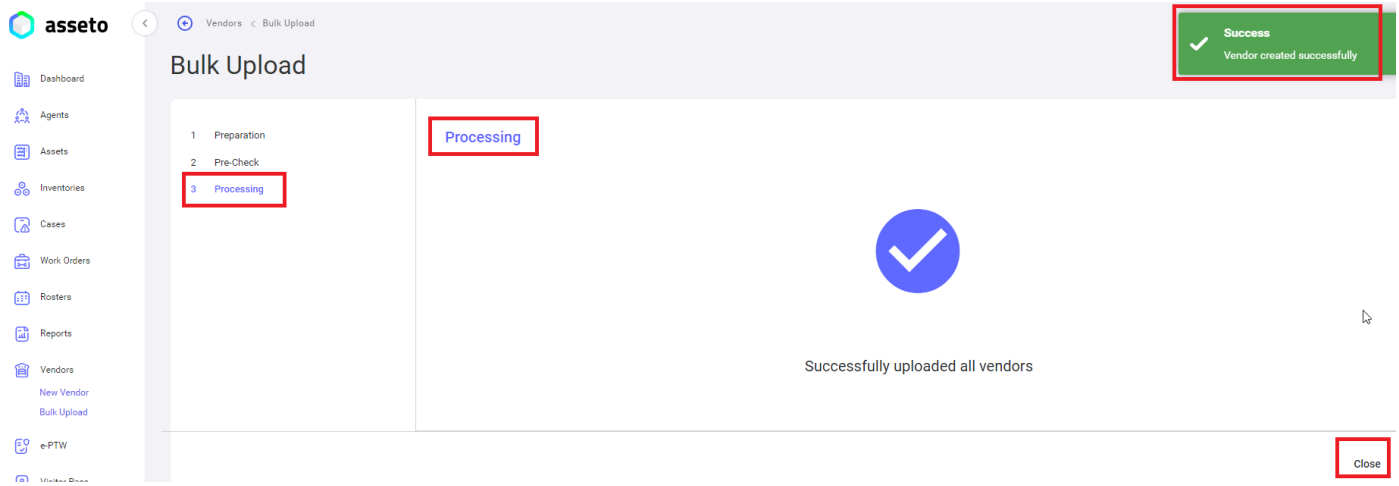


Note: Click on the tooltip (icon) to check the validation status on validation/pre-check page.

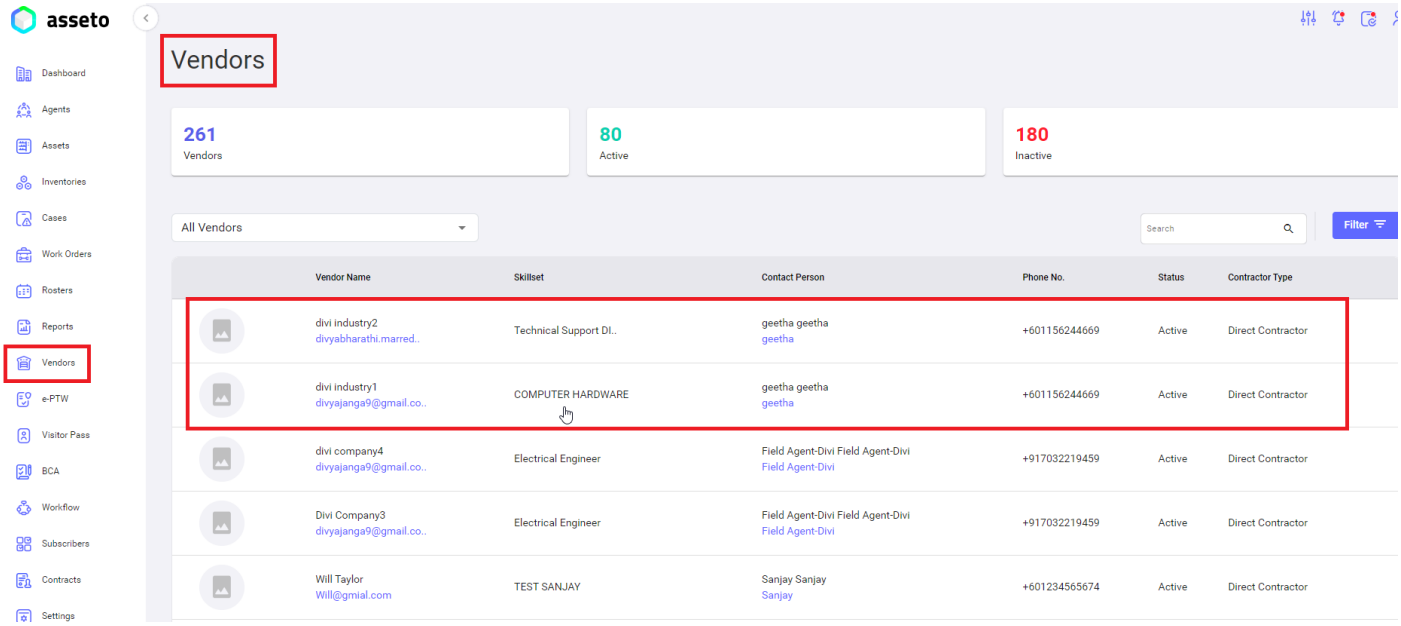


If there are no errors user can view passed count (i.e. number of vendors added) submit button enabled. Click on the submit button system will navigate to next page.

3. Processing: you can see the progress of bulk upload to the application. “Vendors created successfully” confirmation message will be displayed.



Click on close. added Vendors through bulk upload will be displayed on the Vendors list page as shown by following screenshot.



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