# IE: Adding multiple participants

**1**

Hello and welcome!
In this video, we will guide you on how to invite multiple participants to the Impact Evaluator. As an owner, admin, manager, or coordinator, you have the capability to efficiently invite participants and add them to specific programs and groups. For example, a coordinator, also referred to as a facilitator, can invite their entire class at once and seamlessly add them to a program and group.
Let's get started!



Impact Demo Nonprofit

Credits Remaining: 49

Demo Owner
Impact Demo Nonprofit
Owner

My Dashboard
Users
Programs
Groups
Reports
Analytics

**+ Participant**   **+ Program**

Demo Owner
david+demo-owner@flipsideup.net
Owner
Joined in Oct 2, 2024

**Users**   **Edit Profile**

| Total Managers | Total Coordinators |
|---|---|
| 0 | 0 |
| Total Participants | Total Groups |
| 1 | 0 |

Number of Programs
1

Nonprofit/Educational...

Filter by Age

PARTIC...   CITY   PROGRAMS   EVALUATIONS

## 2    Click on **Users in the side menu**



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## 3    Click Multiple Participants button
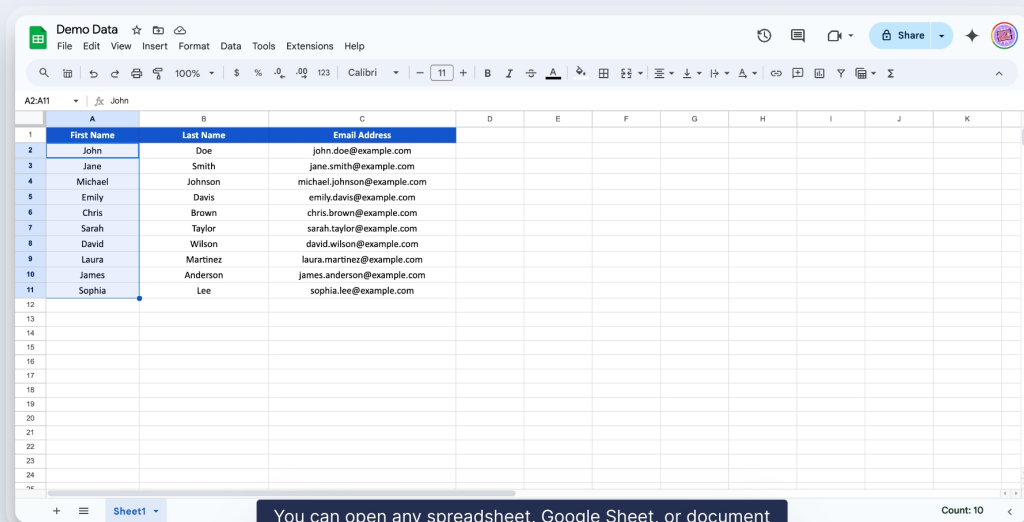


Click Multiple Participants button

**4** Now that the popup is open, you can import participants by copying each column from your spreadsheet and pasting them into their respective fields in the app.
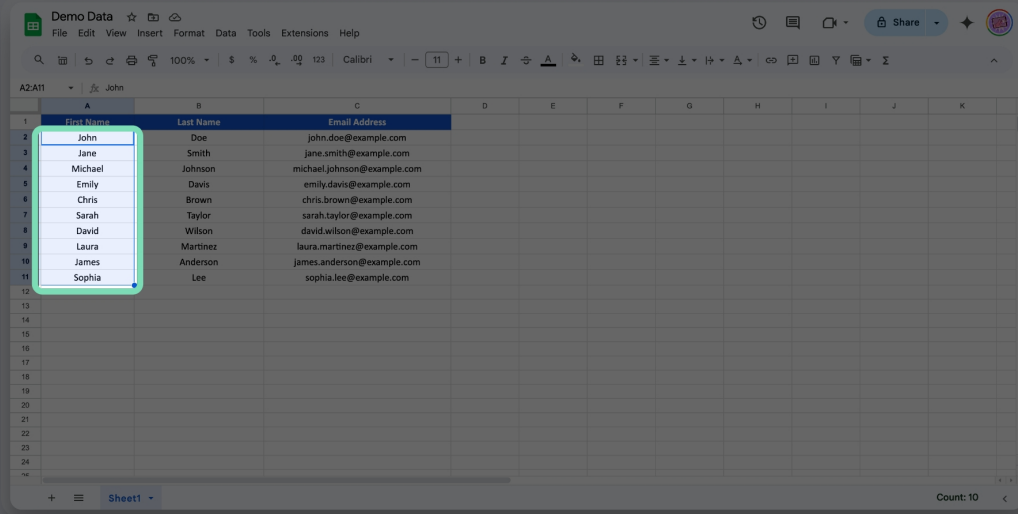
**5** You can open any spreadsheet, Google Sheet, or document where your participant data is stored.

If your spreadsheet has headers, make sure not to copy them—only copy the data in each column.
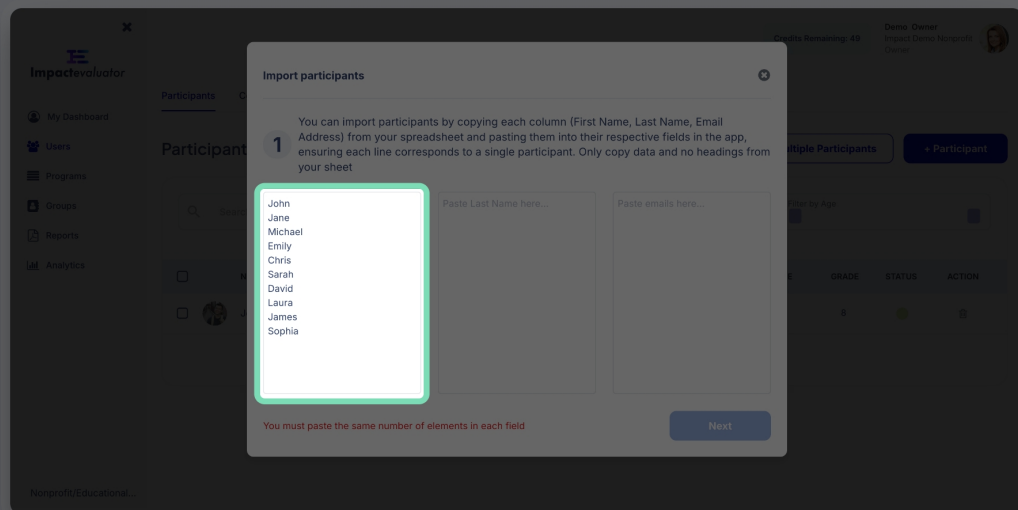
**6** Copy the data in each column. Lets copy everything in the first column excluding the header.



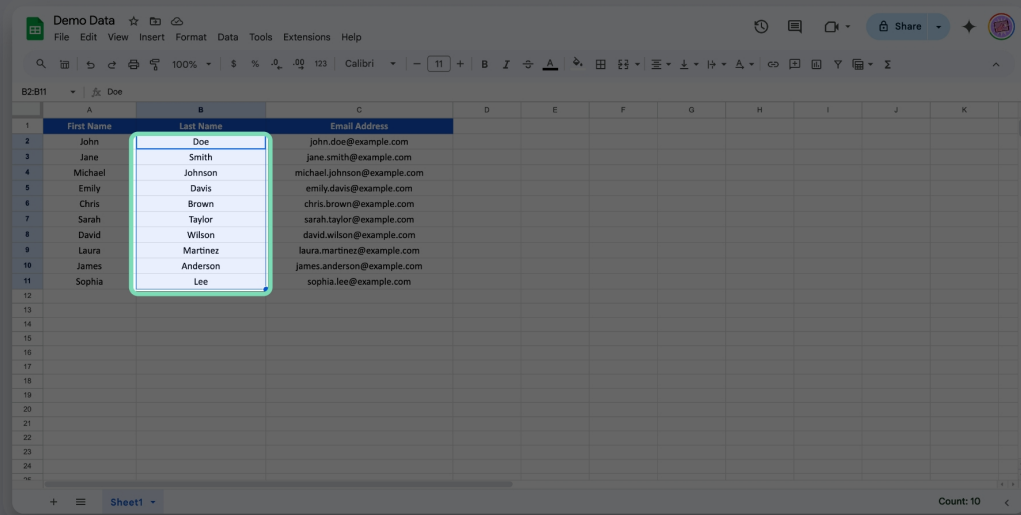Copy the data in each column. Lets copy everything in the first column excluding the header.

**7** Paste the first names into the first column.



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## 8

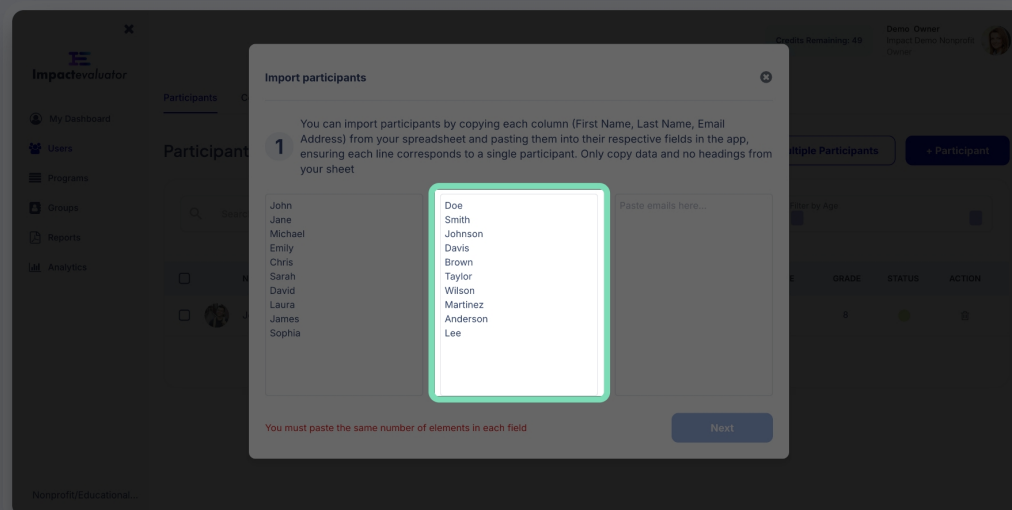Copy the last names in column 2, excluding the header.



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## 9

And paste the last names into column 2.



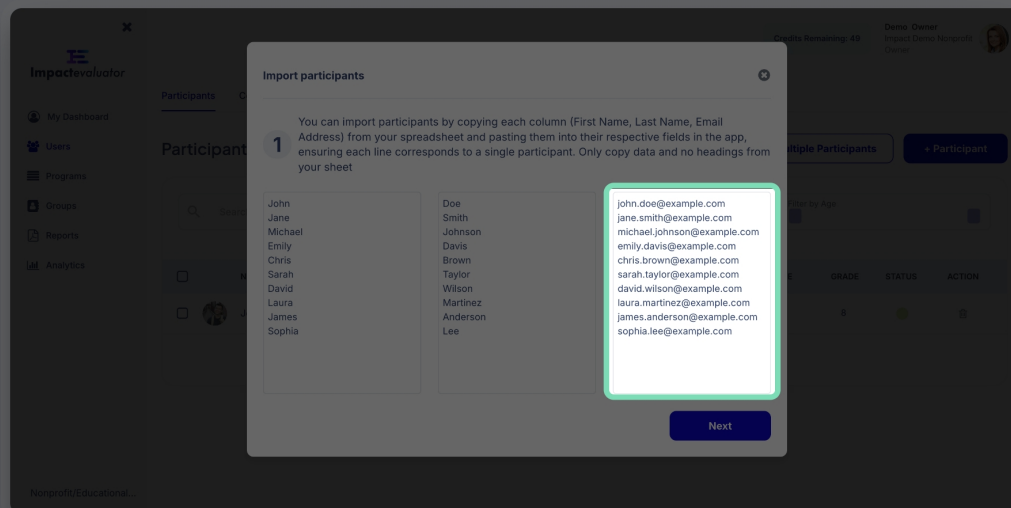And paste the last names into column 2.

**10** And finally, copy the email addresses in the third column, excluding the header.
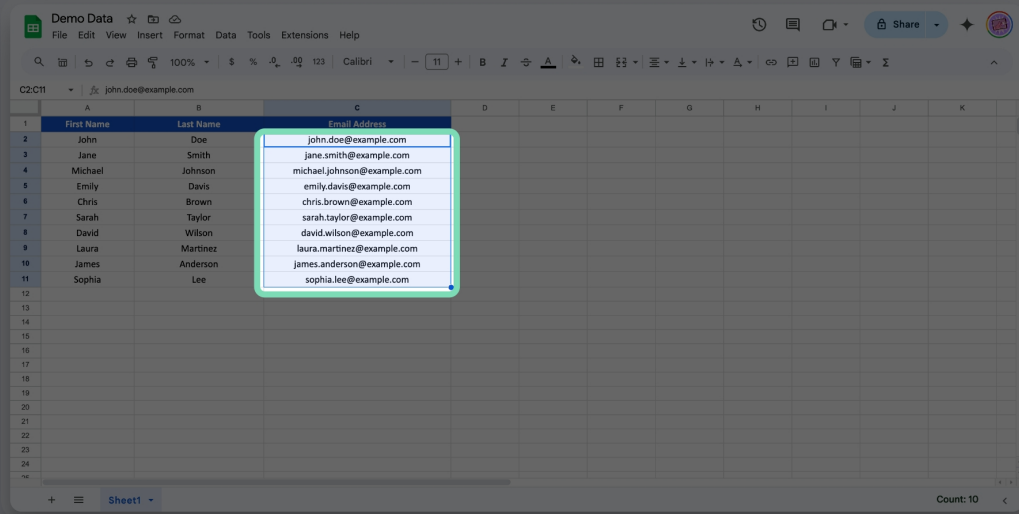


And finally, copy the email addresses in the third column, excluding the header.
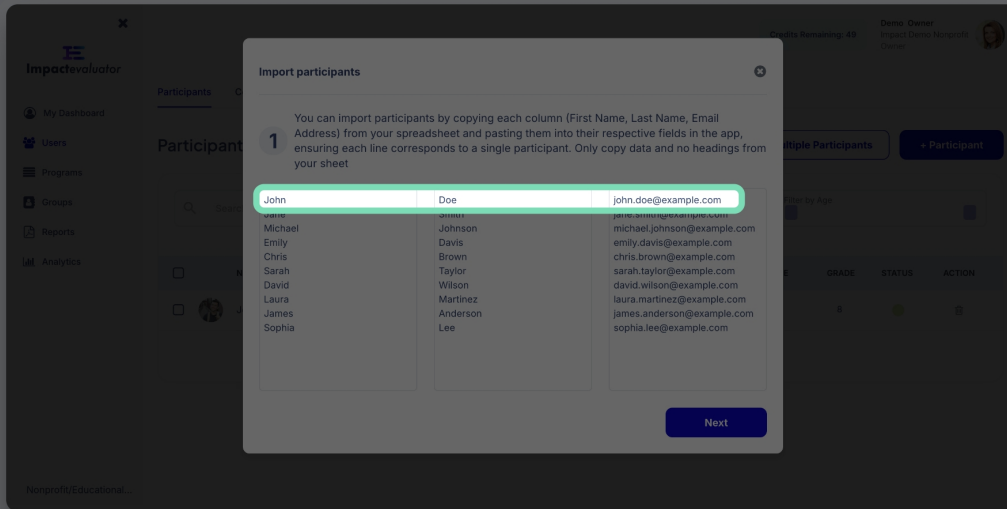
**11** Paste them into the "Email Address" field.



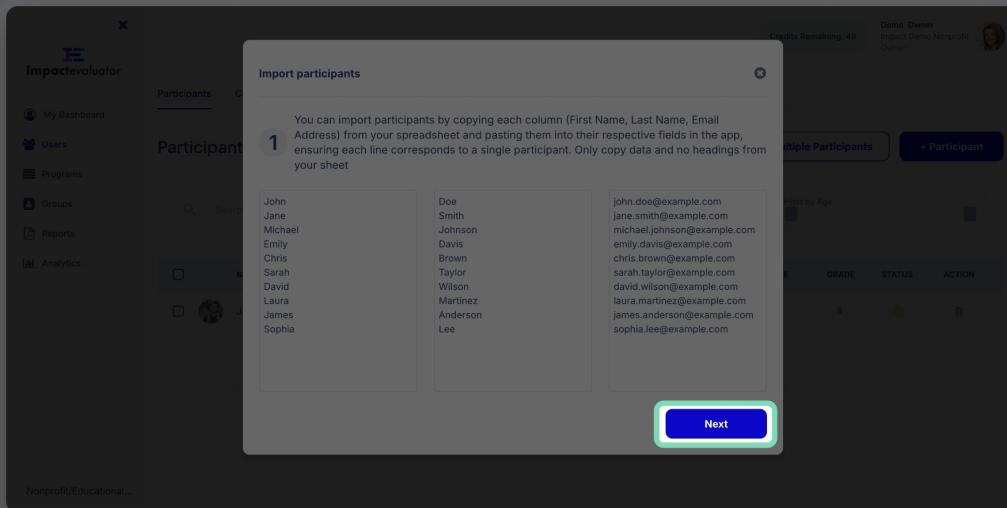Paste them into the "Email Address" field.

**12** Ensure that all names are correctly matched with their corresponding email addresses.



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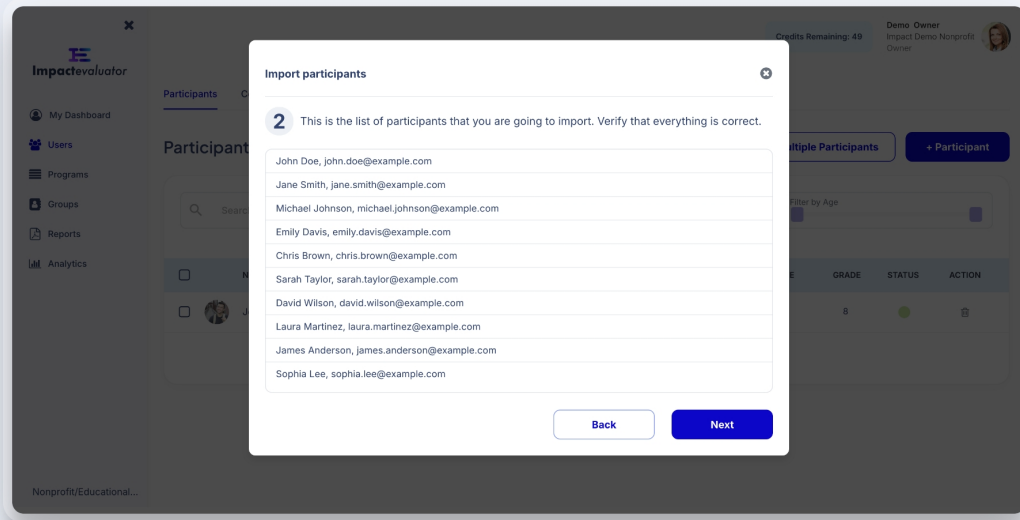
**13** Click the **Next button.**
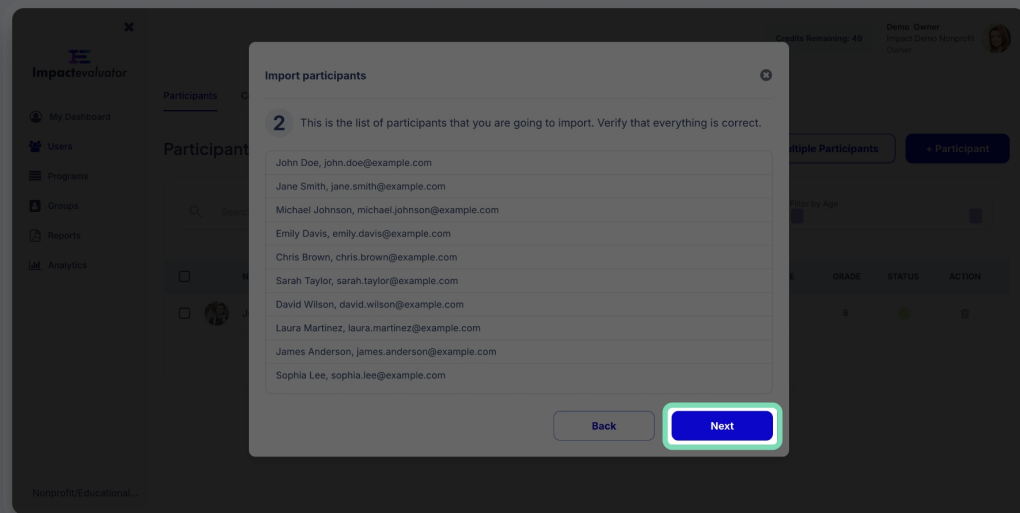


Click the **Next button.**

**14** Please double check that everything is correct before proceeding.



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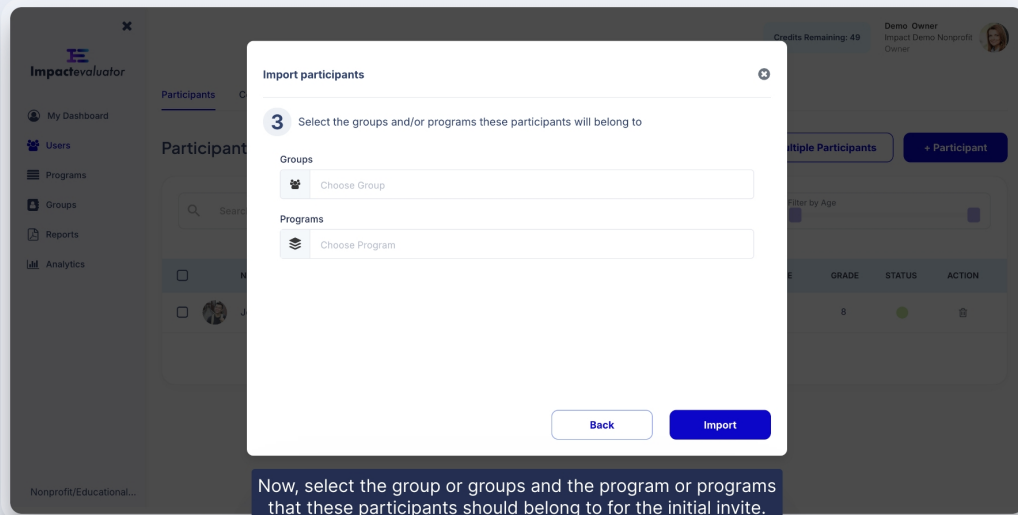
**15** Click "Next" if everything looks correct.



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**16**

Now, select the group or groups and the program or programs that these participants should belong to for the initial invite.

This ensures that participants are properly organized from the start. Remember, you can always add these participants to more groups and programs in the future to suit your needs.
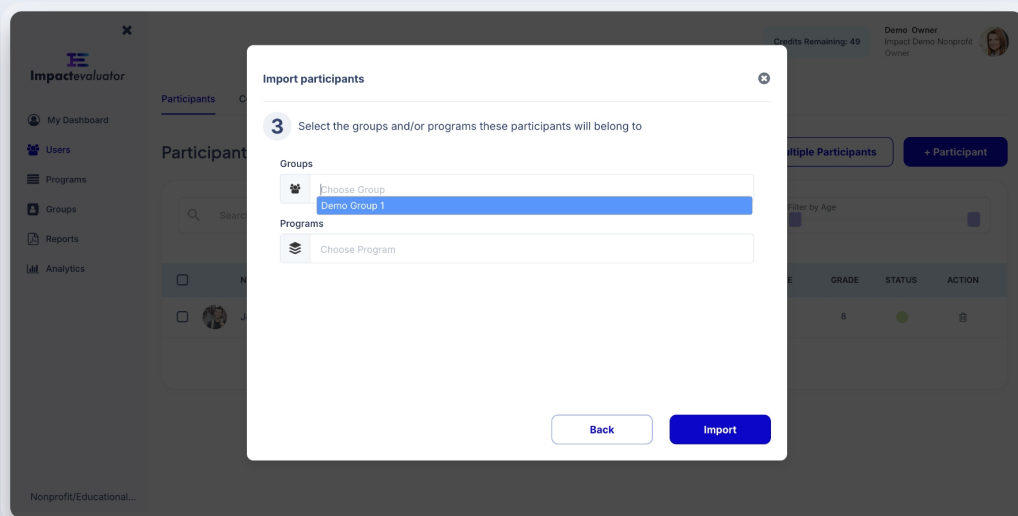


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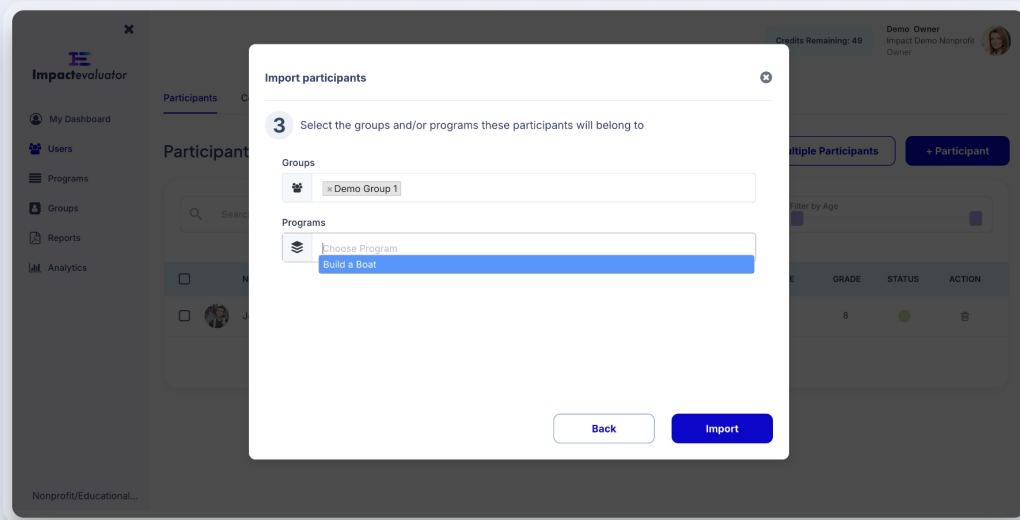
**17**

Select the group or multiple groups from the dropdown.



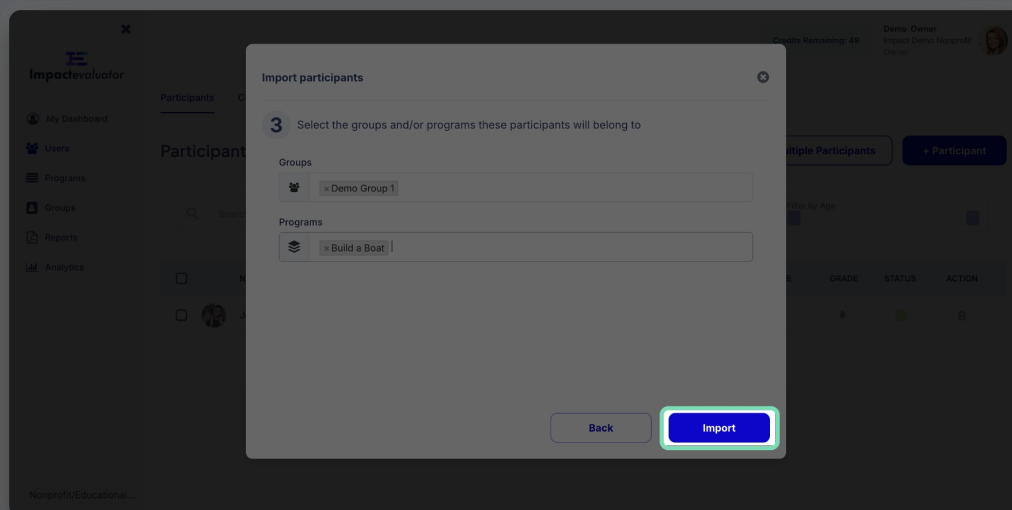Select the group or multiple groups from the dropdown.

**18**

And the program or you can select multiple programs.



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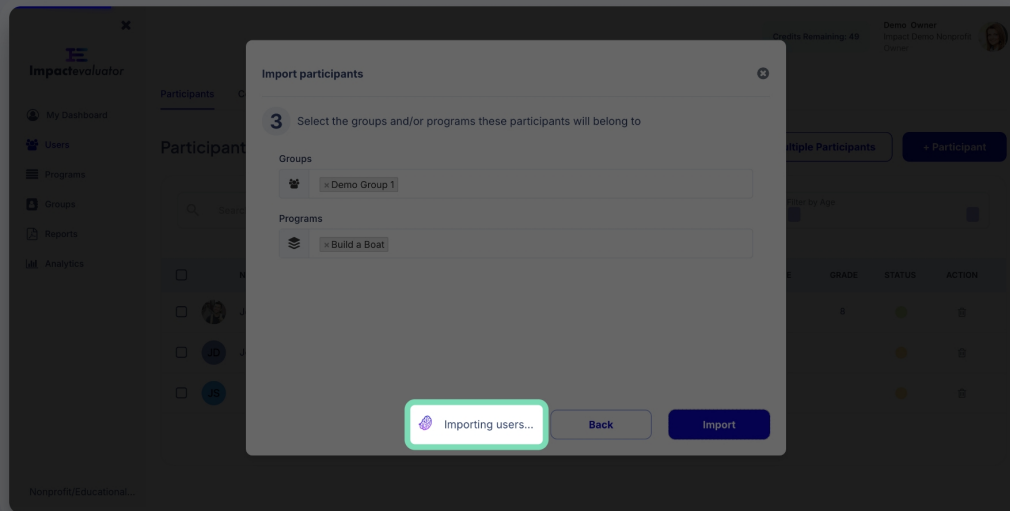
**19**

Click the Import button.
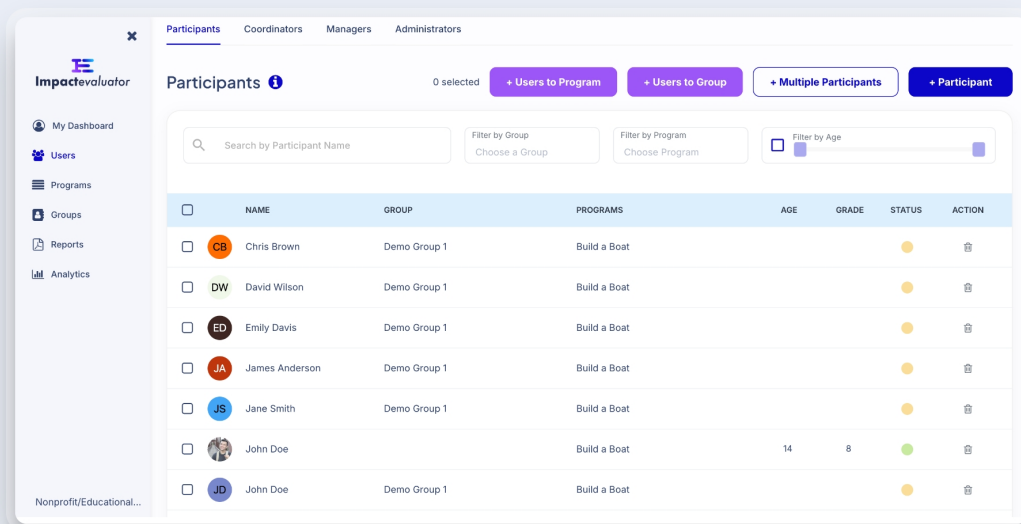


Click the Import button.

**20** A spinner will appear at the bottom to indicate that the import is in progress.



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**21** Once you've completed the invitation process, you can view all the invited participants under the "Participants" tab.



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**22** You will see an orange dot under "Status" column indicating the invite is pending.



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**23** Once a user accepts the invite via email, the dot will turn green.



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**24**

That completes this quick tutorial to invite multiple participants and add them to groups and programs.

Thanks for watching.



| | NAME | GROUP | PROGRAMS | AGE | GRADE | STATUS | ACTION |
|---|---|---|---|---|---|---|---|
| ☐ CB | Chris Brown | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ DW | David Wilson | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ ED | Emily Davis | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ JA | James Anderson | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ JS | Jane Smith | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ | John Doe | | Build a Boat | 14 | 8 | ● | 🗑 |
| ☐ JD | John Doe | Demo Group 1 | Build a Boat | | | ● | 🗑 |
| ☐ LM | Laura Martinez | Demo Group 1 | Build a Boat | | | ● | 🗑 |

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Thanks for watching.