



# CSV Onboarding

## App Overview

Faster Onboarding  
with Bulk Uploads



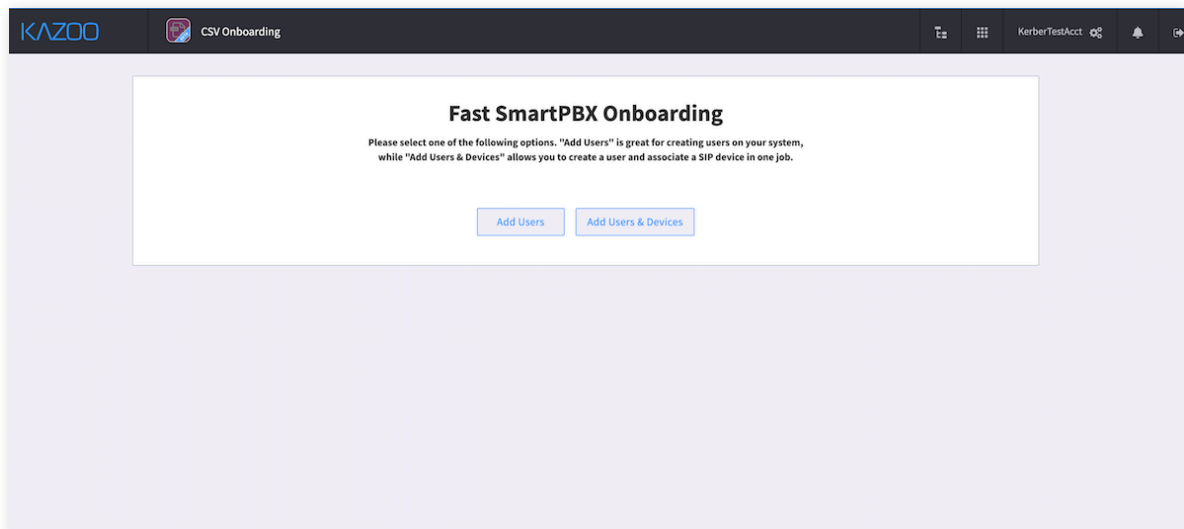
# CSV Onboarding

## Overview

Gone are the days of adding new users one by one! Fast SmartPBX onboarding is now possible with the CSV Onboarding app. The CSV Onboarding app enables account admins to perform bulk uploads to create new users and associate SIP devices in one job. Simply upload your csv file, confirm the record mapping is correct and voila! The users will be added to SmartPBX.

With the CSV Onboarding app, you can:

- Bulk upload new users and/or devices
- Create passwords and extensions for new users
- Associate SIP devices with users
- Customize settings for users, devices and voicemail boxes

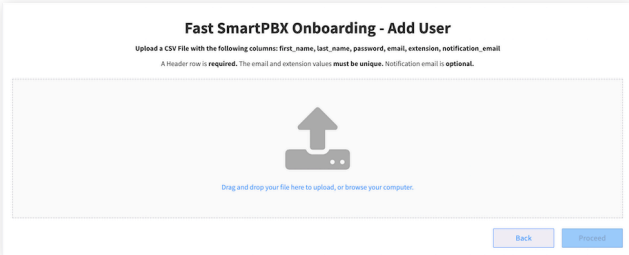


## Highlights

# CSV Onboarding

### Add Users or Users & Devices

Simply create a CSV file with the required columns and upload it from your desktop. Importing your CSV is simple and only takes a few clicks.



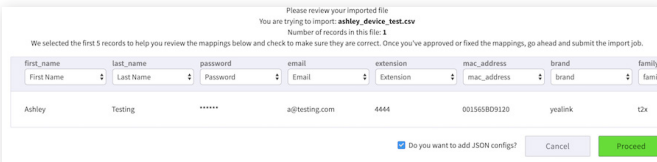
**Fast SmartPBX Onboarding - Add User**

Upload a CSV File with the following columns: first\_name, last\_name, password, email, extension, notification\_email

A header row is required. The email and extension values must be unique. Notification email is optional.

Drag and drop your file here to upload, or browse your computer.

Back Proceed



Please review your imported file

You are trying to import: **ashley\_device\_test.csv**

Number of records in this file: 1

We selected the first 5 records to help you review the mappings below and check to make sure they are correct. Once you've approved or fixed the mappings, go ahead and submit the import job.

first_name	last_name	password	email	extension	mac_address	brand	family
First Name	Last Name	Password	Email	Extension	mac_address	brand	family
Ashley	Testing	*****	a@testing.com	4444	001365809120	yealink	t2x

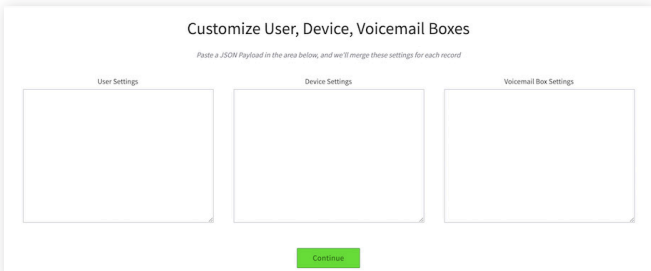
☒ Do you want to add JSON configs? Cancel Proceed

### Review Imported File

Confirm that the data for each column is mapping correctly from your CSV file. Once confirmed, all you have to do is click 'proceed' and your data will be imported.

### Customize User, Device, Voicemail Boxes

Adding settings is a cinch! Paste a JSON Payload and settings for each record will automatically be merged. This can be done for user settings, device settings, and voicemail settings.



**Customize User, Device, Voicemail Boxes**

Paste a JSON Payload in the area below, and we'll merge these settings for each record

User Settings

Device Settings

Voicemail Box Settings

Continue

# CSV Onboarding

## Technical Specifications

### Fast SmartPBX Onboarding

- Users
- Users & Devices

### Add Users

- CSV File
- CSV File Columns
  - First\_Name
  - Last\_Name
  - Password
  - Email
  - Extension
  - Notification\_Email (optional)

### Add Users & Devices

- CSV File Columns
  - First\_Name
  - Last\_Name
  - Password
  - Email
  - Extension
  - Mac\_address
  - Brand
  - Family
- Add JSON configs
  - User Settings
  - Device Settings
  - Voicemail Box Settings

### Customize User, Device, Voicemail

- User
- Users & Devices
- Add New Language Pack
- Clone Existing Language Pack
- Upload File
- Select Reference File
- Edit Content

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For additional information, please contact your Account Executive or email [sales@2600hz.com](mailto:sales@2600hz.com).

