Team Members Upload Instructions

Document Overview:

Template Version	Last Updated on	New Updates
Team_Member_NoRole_Upload_1.0	Nov, 2025	No changes

General Instructions

File Specifications

- **File Format**: Ensure the file is saved as .CSV (Comma-Separated Values). Other formats like .xls or .xlsx are not supported. See how to convert other file formats to CSV.
- **File Size**: The file size should not exceed the specified limit (e.g., 15 MB). Split large files into smaller ones if necessary.
- **Row Limit**: Rows exceeding 20,000 entries should be split into multiple files to ensure smooth processing.
- **Encoding**: Use UTF-8 encoding to avoid errors with special characters or unsupported languages.

Data and Input Specifications

- **Mandatory Fields**: Fields marked as required or mandatory must be filled for every record.
- **Empty Fields**: If a value is not applicable, leave the field blank rather than using placeholders like "N/A" or "NULL."
- **Comma in Values**: If any of the values contain commas, enclose them in double quotes (EX. "Brown, Davis & Partners").
- **Headers & Column Order**:
  - Headers can be edited as needed.
  - **Do not change the order of columns,** as the system maps data based on column position.
- **Duplicate Records**: Duplicates can cause errors or inconsistencies in the submission process. Therefore, ensure that each record is unique by removing any duplicate rows.
- **Predefined Values**: For fields with fixed-choice options, ensure you use values exactly as defined in the template instructions.
- **Special Characters**: All special characters are allowed except $< > ; \{ \} [ ] \_ \backslash ! : ? =$ (These characters will be removed before upload.) If any text has a dot followed by letters, a space will be added after the dot.

Field Name	Description	Maximum Length	Input Characters
Team member name*	The full name of the team member whom you want to add.	75	Alphabets and Numbers All special characters allowed except < > ; { } [ ] _ \ ! : ? =
Email address*	The work email address of the team member.	100	Alphabets and Numbers Allowed special characters are . - _ + and @
Role	The role you want to assign to this team member.	11	Alphabets and Numbers All special characters allowed except < > ; { } [ ] _ \ ! : ? = Allowed values - 1,2 Co-Admin or Team Member. 1 or Co-Admin 2 or Team Member If you leave the field blank or enter an incorrect role, the system will assign a default role based on your role settings as below: No Role: Team Member BanditDuo: Preparer BanditTrio: Preparer
Group	The groups you want to assign to this team member.	75	Alphabets and Numbers All special characters allowed except < > ; { } [ ] _ \ ! : ? =