

Quickstart: Businesses - Onboarding

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







Firstly, ensure you are in your business profile. Do this by selecting switch profile and clicking on your business profile.

Important - make sure you have a CSV file of your employees & their emails, you can do this on Excel and then export to CSV. If you would like to split them into departments you must have a separate CSV.

The screenshot shows the IIC Business dashboard. At the top left, there is a navigation bar with the IIC logo and the text 'INVESTORS IN COMMUNITY'. Below this, there are links for 'Home', 'Explore', and 'About Us'. On the left side, there is a user profile section for 'IIC Business' with a circular profile picture icon. Below the profile picture are navigation buttons for 'DASHBOARD', 'STATISTICS', 'MESSAGES', 'PROJECTS', 'EMPLOYEES', and 'GROUPS'. The main content area is divided into two sections: 'Sign Offs' and 'Employee Requests'. The 'Sign Offs' section has tabs for 'FUNDS', 'GIFTS', 'SKILLED VOLUNTEERING', and 'VOLUNTEERING'. Below these tabs is a table with columns for 'USER', 'DONATION', 'PROJECT', and 'SIGNED OFF BY'. A pagination control shows '1' in a circle. The 'Employee Requests' section has buttons for 'REJECT' and 'ACCEPT'. At the top right, there is a 'Switch Profile' button. A dropdown menu is open, showing three options: 'jfkldjlkds's Profile', 'IIC Business's Profile', and 'Personal Profile'. A hand icon points to the 'IIC Business's Profile' option.



IIC Business

 DASHBOARD	 STATISTICS
 MESSAGES	 PROJECTS
 EMPLOYEES	 GROUPS
 WALLET	 ACCOUNT SETTINGS
 ORGANISATION BETA	

Click employees from the side menu.

After clicking on employees you should see the screen below, you should now click the employees tab.

Where the arrow points to 'name' is the place you will see all employees you currently have registered.

The screenshot displays the 'IIC Business' web application interface. At the top, there is a navigation bar with the logo, 'INVESTORS IN COMMUNITY', and links for 'Home', 'Explore', and 'About Us'. A 'Switch Profile' button is visible in the top right corner. The main content area is divided into two tabs: 'GROUPS' and 'EMPLOYEES'. The 'EMPLOYEES' tab is active, and a hand icon points to it. Below the tabs is a search bar labeled 'SEARCH EMPLOYEE' with a hand icon pointing to it. To the right of the search bar are three buttons: 'IMPORT CSV', 'ADD USER', and 'ACTION'. Below these is a table with the following columns: 'NAME', 'EMAIL', 'LOCATION', 'DIVISION', 'PERMISSIONS', and 'ALL'. The table contains one row of data for 'Sophie Ellingham' with email 'sophie.ellingham@investorsincommunity.org', location 'Chesterfield', division 'IIC Business', and permissions 'Super Admin'. A hand icon points to the 'NAME' column header. At the bottom of the table, there are navigation arrows and a page number '1'. On the left side of the interface, there is a sidebar with a user profile icon and the text 'IIC Business'. Below this is a grid of navigation buttons: 'DASHBOARD', 'STATISTICS', 'MESSAGES', 'PROJECTS', 'EMPLOYEES' (highlighted in black), and 'GROUPS'.

NAME	EMAIL	LOCATION	DIVISION	PERMISSIONS	ALL
Sophie Ellingham	sophie.ellingham@investorsincommunity.org	Chesterfield	IIC Business	Super Admin	<input type="checkbox"/>

Now click Import CSV.

GROUPS **EMPLOYEES**

SEARCH EMPLOYEE **IMPORT CSV** ADD USER ACTION ▾

NAME	EMAIL	LOCATION	DIVISION	PERMISSIONS	ALL
Sophie Ellingham	sophie.ellingham@investorsincommunity.org	Chesterfield	IIC Business	Super Admin	<input type="checkbox"/>

< 1 >

You will see this page pop up, please click add file and select the CSV file you wish to upload, once you have made your selection please click import and the IIC platform will send an invitation to all employees to join.

Select CSV file to import

ADD FILE

no file selected

How to import CSV file:

This feature allows you to mass invite your employees to join your Business profile. To do this complete the following steps:

1. Open a spreadsheet.
2. In the first column list the email addresses you wish to invite to the platform.
3. List one email address per line.
4. Save file as any CSV by selecting: Files > Save As, and ensure you amend the file format by selecting any CSV type from the file format drop-down list.
5. Once you have saved the document in CSV format, select the ADD FILE option above to attach the file, followed by the Import button below.

An invitation to join your business profile will then be sent to all the email recipients listed within the file.

Close Import

Thanks for reading!

Please get in touch if you have more questions.

Contact: business@investorsincommunity.org

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