

Quickstart: Businesses - Onboarding

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Ordinary people
doing extraordinary things.








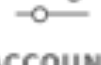

Firstly, ensure you are in your business profile. Do this by selecting switch profile and clicking on your business profile.

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 is a user profile section with a circular icon and the text 'IIC Business'. The main content area is divided into two sections: 'Sign Offs' and 'Employee Requests'. The 'Sign Offs' section has a header with 'All volunteering offers: OFF' and a dropdown menu for 'Switch Profile' with options: 'jfkldjlkds's Profile', 'IIC Business's Profile', and 'Personal Profile'. Below the header are tabs for 'FUNDS', 'GIFTS', 'SKILLED VOLUNTEERING', and 'VOLUNTEERING'. A table with columns 'USER', 'DONATION', 'PROJECT', and 'SIGNED OFF BY' is visible, with a pagination control showing '1'. The 'Employee Requests' section has a header with 'REJECT' and 'ACCEPT' buttons. Below the header is a table with columns 'NAME', 'EMAIL', and 'INFO', and an 'ALL' checkbox.



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' dashboard. The top navigation bar includes the logo, 'INVESTORS IN COMMUNITY', and links for 'Home', 'Explore', and 'About Us'. A 'Switch Profile' button is in the top right. The main content area has two tabs: 'GROUPS' and 'EMPLOYEES', with the latter selected. Below the tabs is a search bar labeled 'SEARCH EMPLOYEE' with a hand cursor pointing to it. To the right are buttons for 'IMPORT CSV', 'ADD USER', and an 'ACTION' dropdown menu. A table lists the employees with columns for NAME, EMAIL, LOCATION, DIVISION, PERMISSIONS, and an 'ALL' checkbox. One employee, Sophie Ellingham, is listed with email sophie.ellingham@investorsincommunity.org, location Chesterfield, and division IIC Business. A pagination bar at the bottom shows a single page '1' with navigation arrows. On the left, a sidebar contains icons for 'DASHBOARD', 'STATISTICS', 'MESSAGES', 'PROJECTS', 'EMPLOYEES' (highlighted), and 'GROUPS'. A hand cursor points to the 'EMPLOYEES' icon in the sidebar.

INVESTORS IN COMMUNITY Home Explore About Us Switch Profile

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 >

DASHBOARD STATISTICS MESSAGES PROJECTS EMPLOYEES GROUPS

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: ross.shipman@investorsincommunity.org

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