



How to Add Members

A step-by-step guide to creating your Connect community

Importing your members into GabrielSoft Connect is easy. Start by exporting a list of existing members from another communications platform as a CSV file. Make sure your file contains at least four columns: **First Name**, **Last Name**, **Email** and **Mobile Number**. Now you're ready to import!

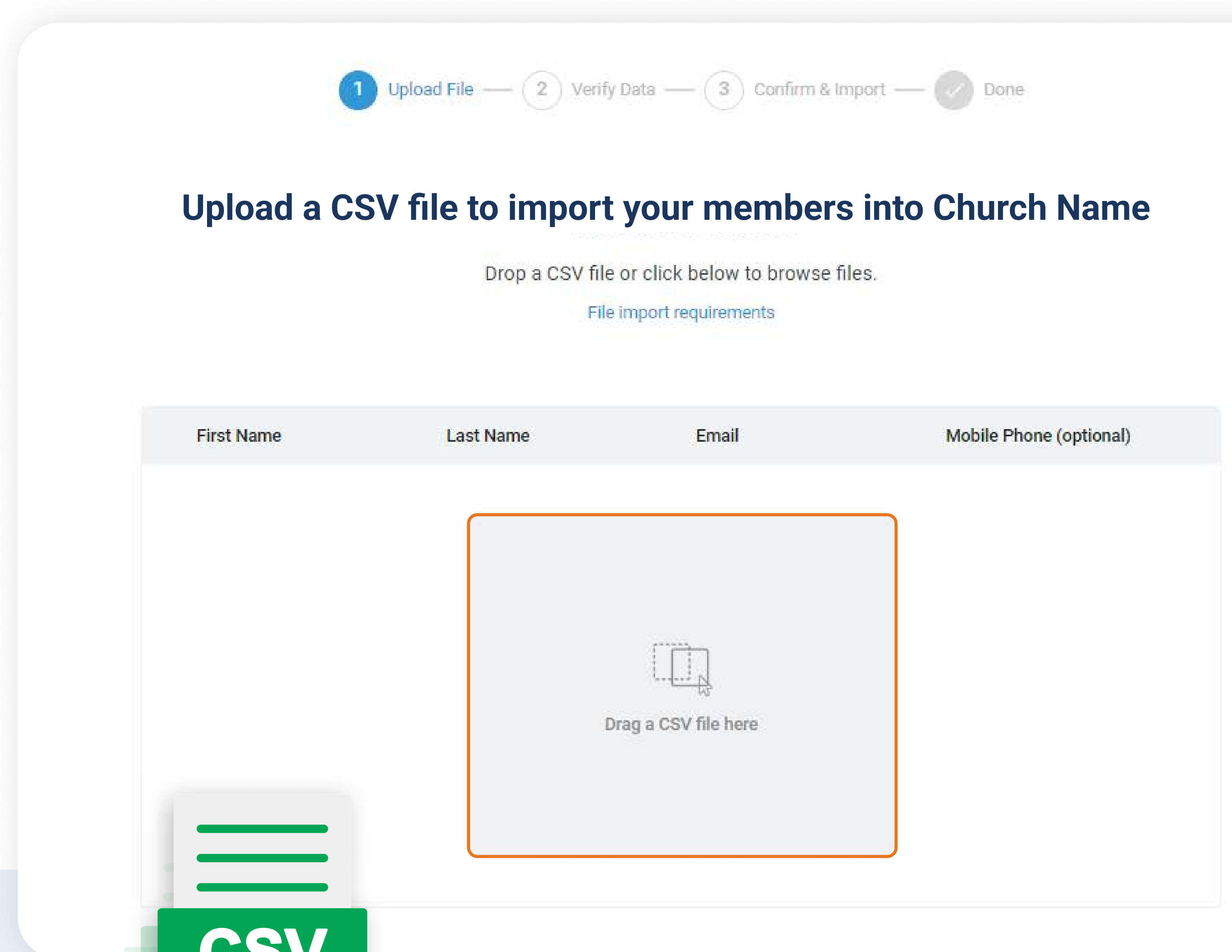
STEP 1

Import your member list

To begin importing your members into GabrielSoft Connect, click the **Import Members** button on the Connect homepage.

From here, drag and drop your CSV file into the file upload window to initiate the import process.

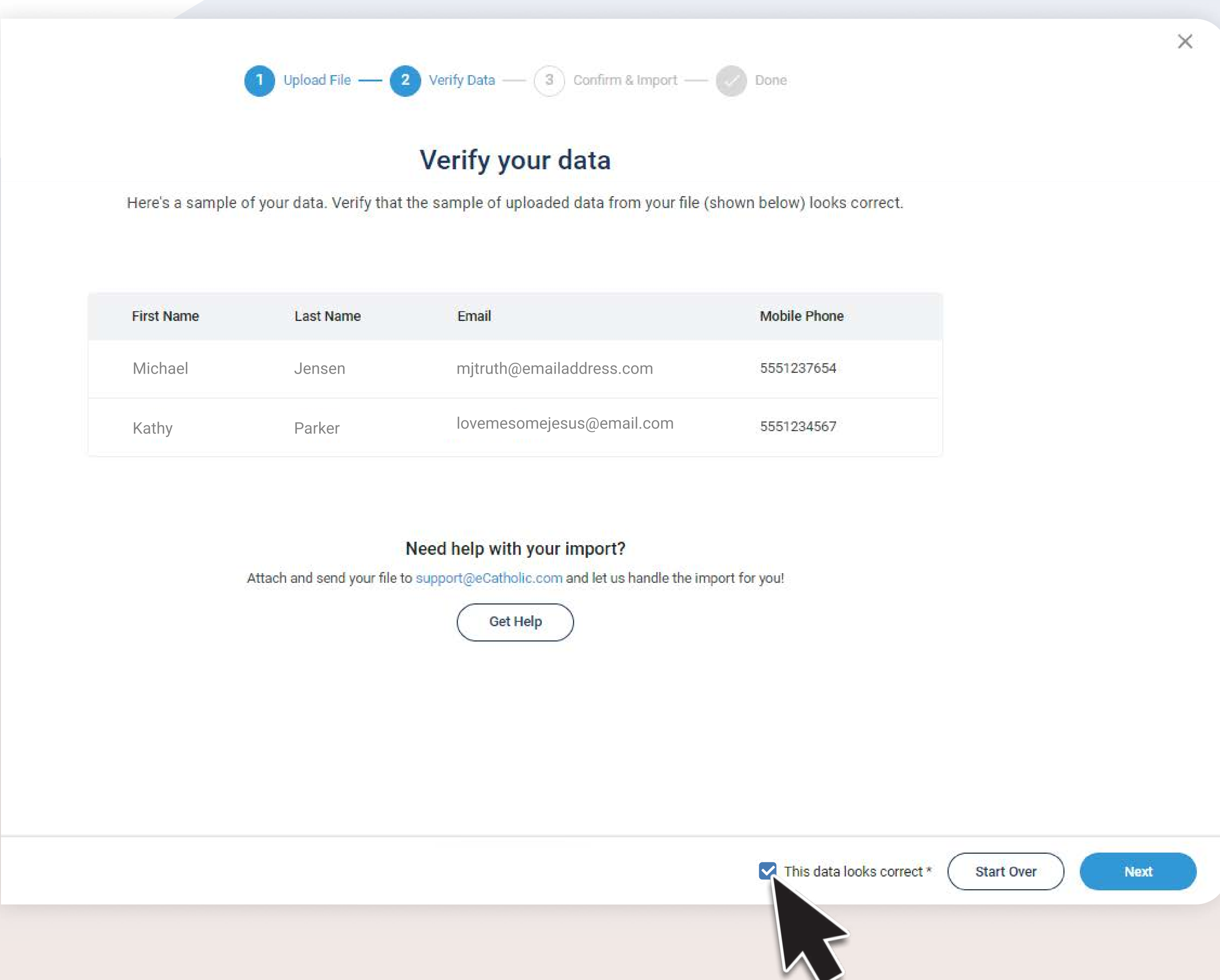
Note: You may also use a CSV file to import members directly to specific groups. Doing so will automatically add members to your main organization list as well.



STEP 2

Verify your member data

You'll then be prompted to confirm that all member information has been correctly imported under the corresponding columns. If everything looks right, check the *This data looks correct* box and select **Next** to continue.



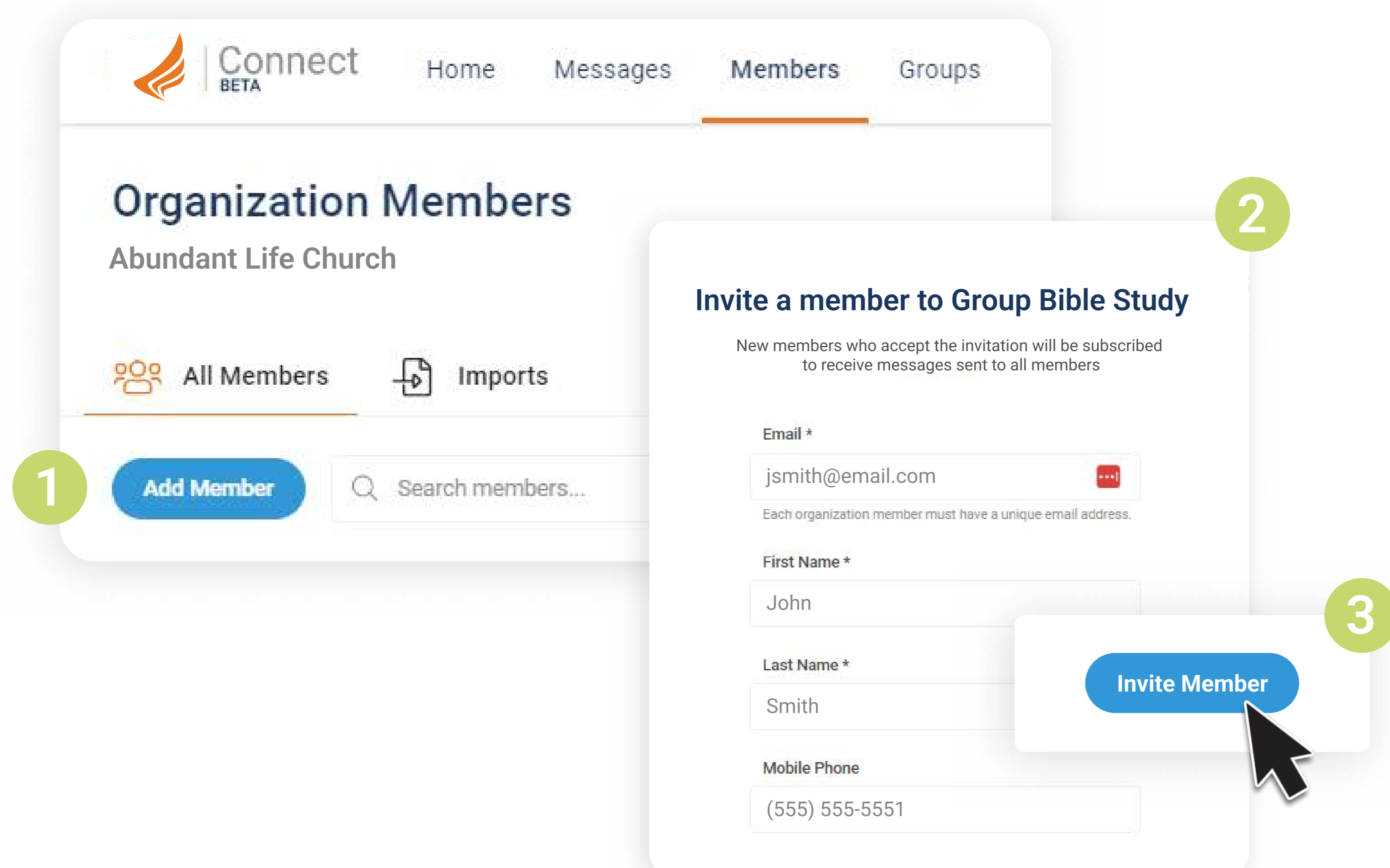
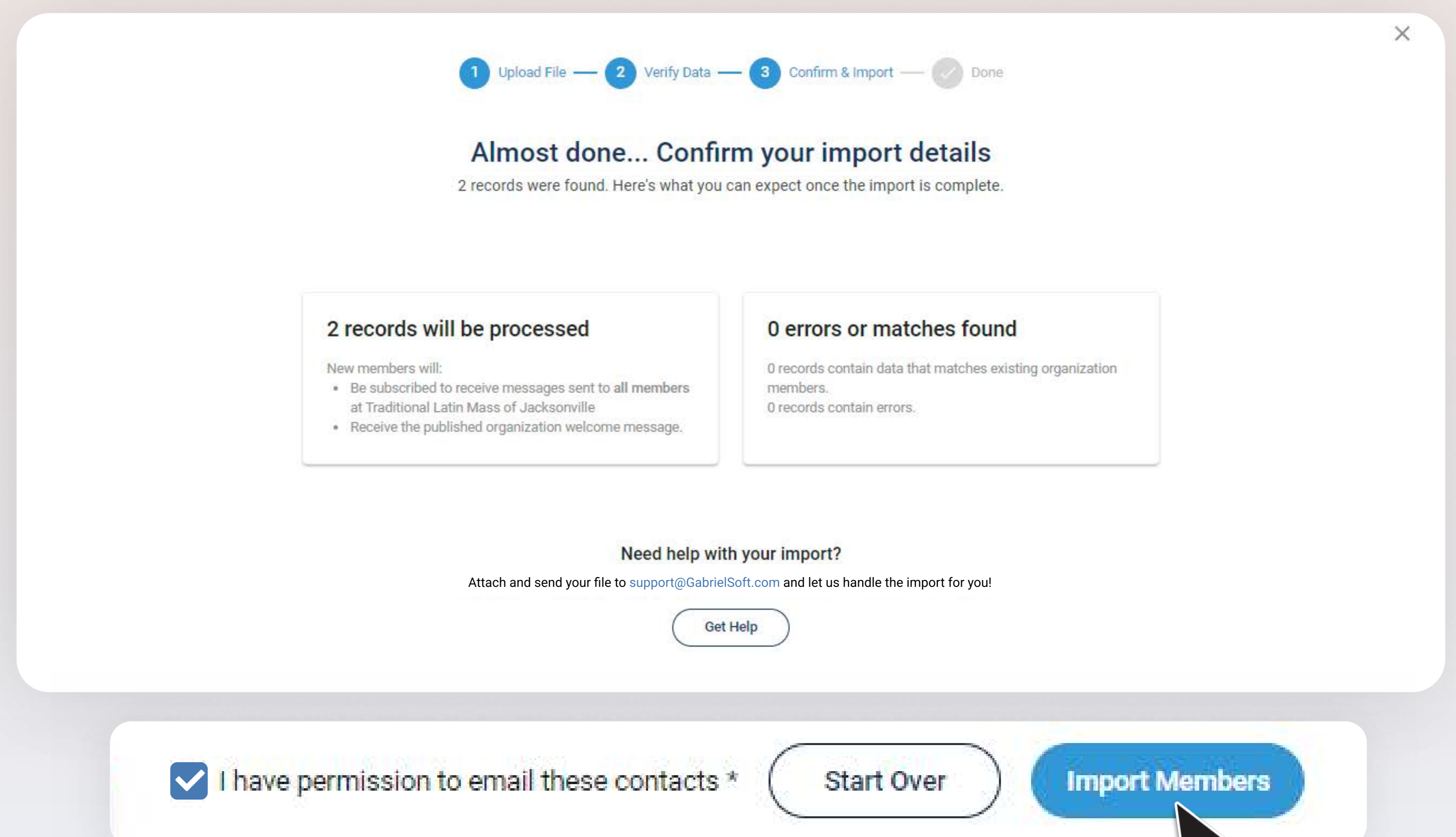
STEP 3

Confirm your import

Lastly, you'll be prompted to confirm that you have permission to email the members on the list. If these are existing members from another platform, then you do have permission and can check the permissions box and click the **Import Members** button.

All members will then receive your Welcome email notifying them that they've been added to receive messages from your organization.

Note: If you are importing members for the first time, and just getting started, then you likely **do not** have permission and will need to follow the instructions in Step 4 below for inviting individual members.




STEP 4 - IF NEEDED

How to Invite Individual Members

Click on the **Add Member** button located under the Members tab of your Connect dashboard. From there, fill out the member's information, including Email, First & Last Name, and optionally, their Mobile Number. Then, click the **Invite Member** button.

Your Welcome email will be automatically sent to the member, allowing them to join and subscribe. And that's it, you're done!

 If you have any questions or having trouble with importing your members, contact support@gabrielsoft.com and we'll be happy to help!