

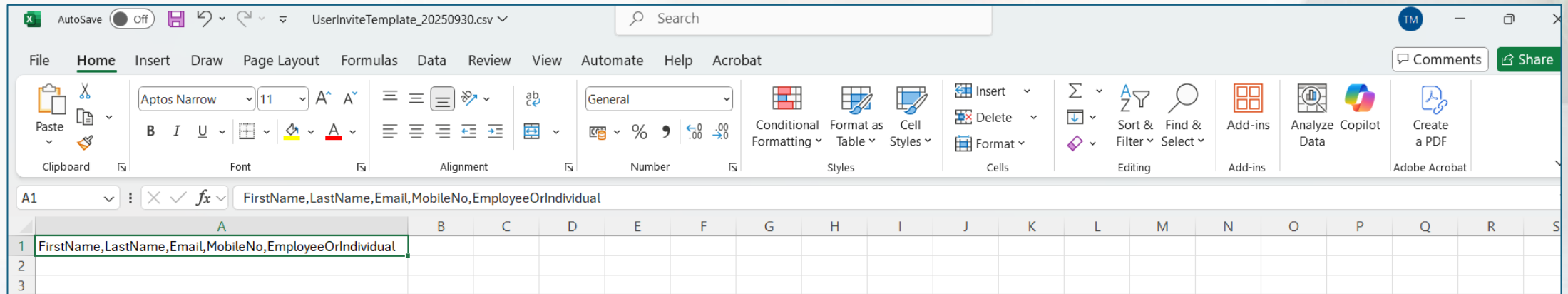


Troubleshooting Guide (Download CSV file)

25 November 2025

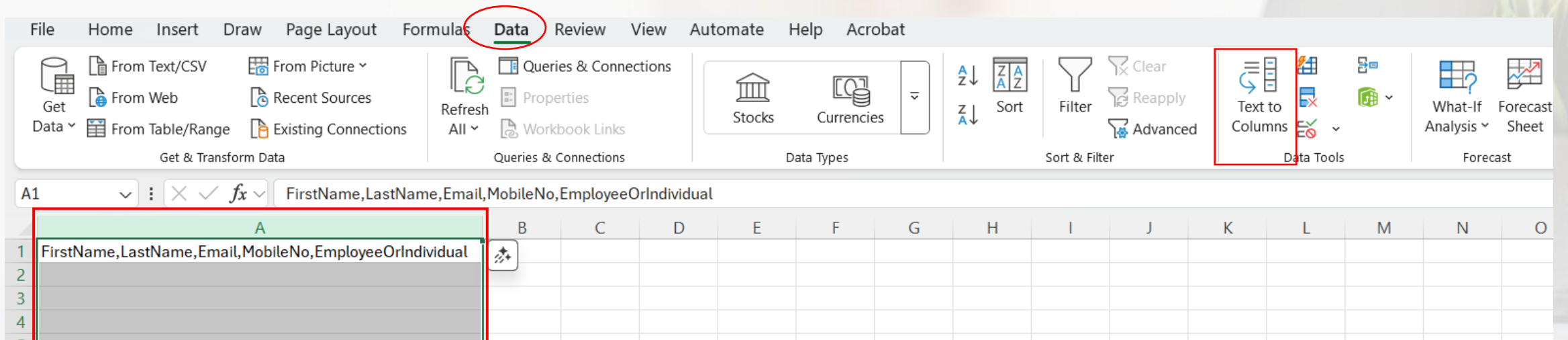
Troubleshooting Guide

- If the download CSV template displays column heading as per below screenshot, please follow the next steps to fix the format.



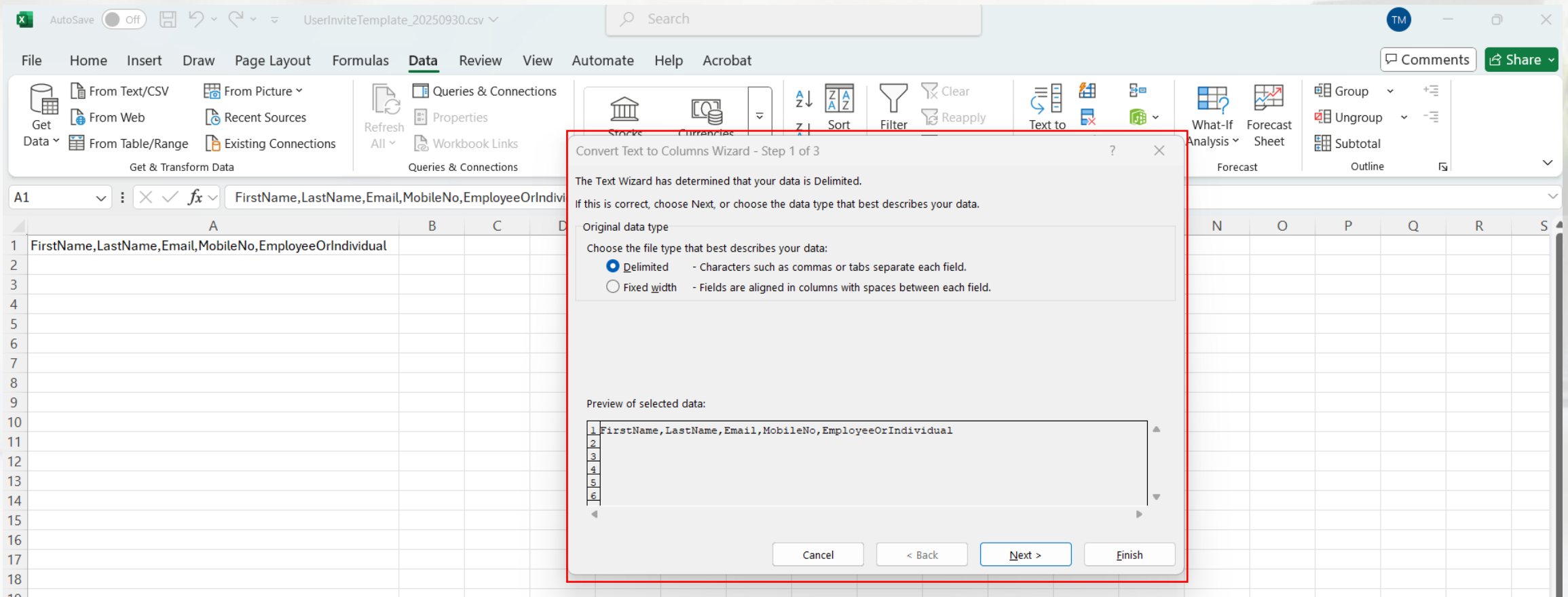
Download CSV Template Troubleshooting

- Select column A
- Select Data tab
- Select Text to Columns tab



Download CSV Template Troubleshooting

- Decimal must be ticked
- Click Next



The screenshot shows the Microsoft Excel interface with the 'Convert Text to Columns Wizard - Step 1 of 3' dialog box open. The dialog box contains the following text:

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.
☐ Fixed width - Fields are aligned in columns with spaces between each field.

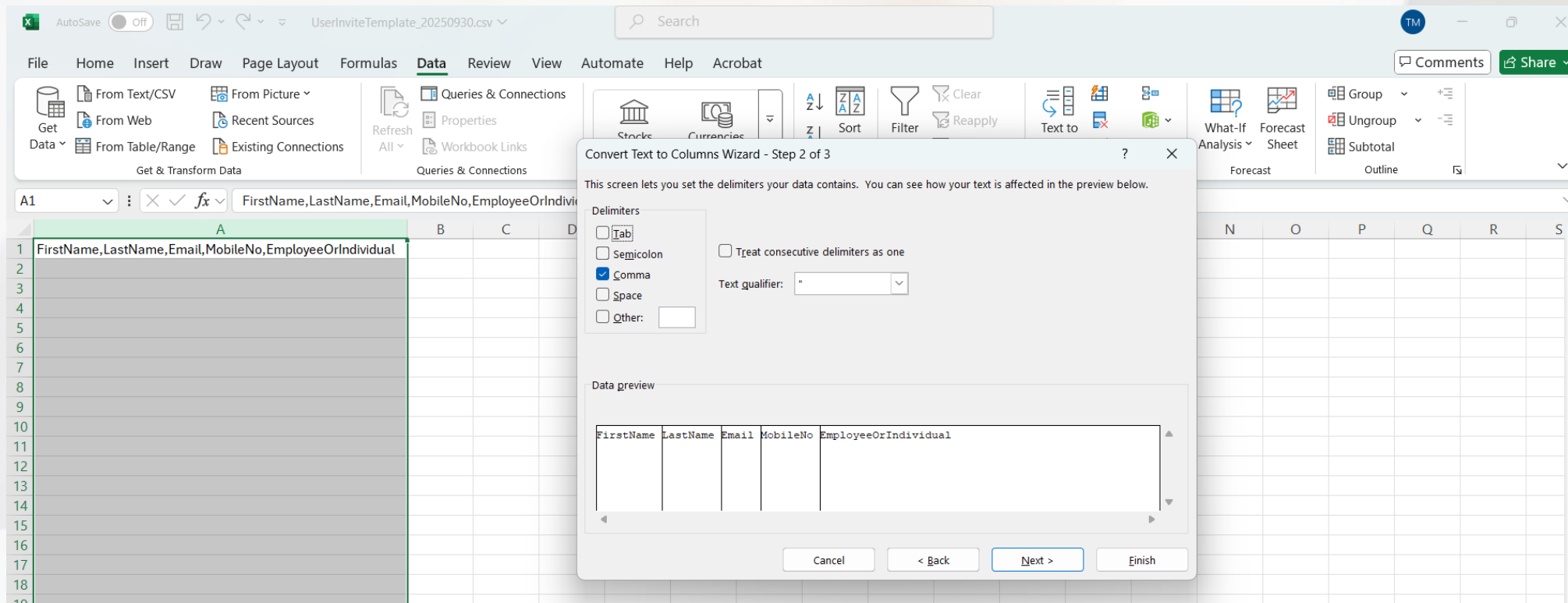
Preview of selected data:

1 FirstName,LastName,Email,MobileNo,EmployeeOrIndividual
2
3
4
5
6

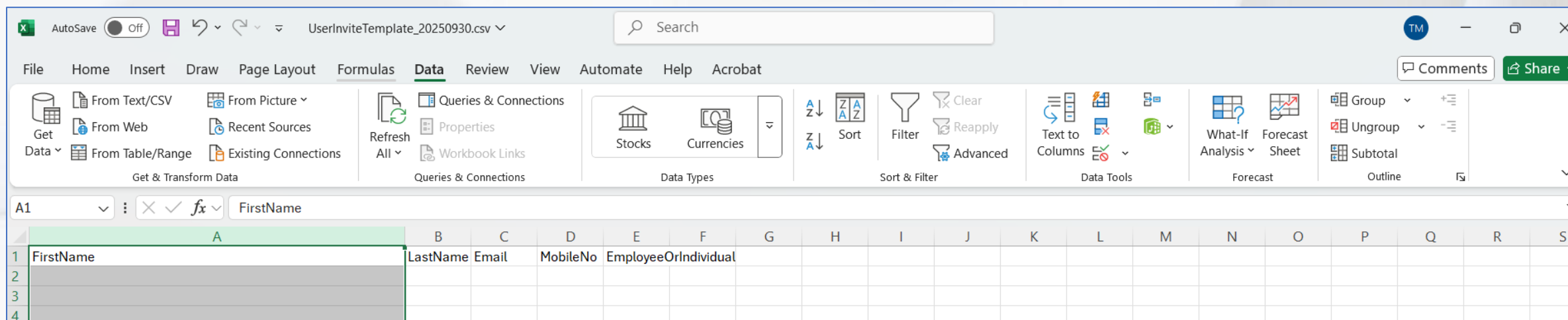
Buttons: Cancel, < Back, Next >, Finish

Download CSV Template Troubleshooting

- Deselect Tab box
- Select Comma box
- Click Next
- Columns heading will automatically update and you can capture your data and upload



- # display incorrectly columns as per below.



You can view and manage pending invites by selecting “Pending Invites” tab from side panel or from the dashboard grid view

