

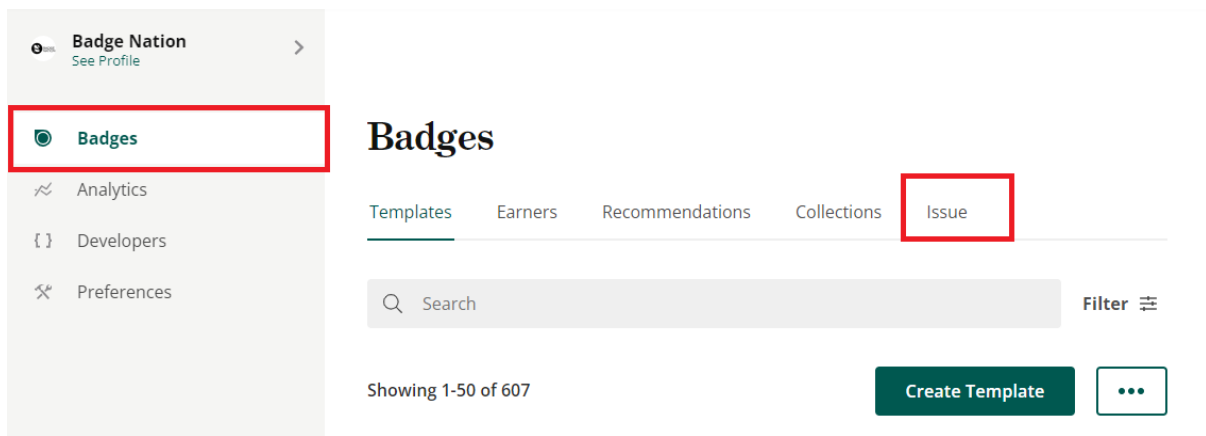
2.3 How can I bulk issue badges using Credly?

Bulk issuing is the process which allows you to issue one or multiple badges to many individual earners at a time. This is a great option for circumstances where you are dealing with large numbers of earners, or have several badges to issue to a group, e.g. at the end of a module, course, or programme.

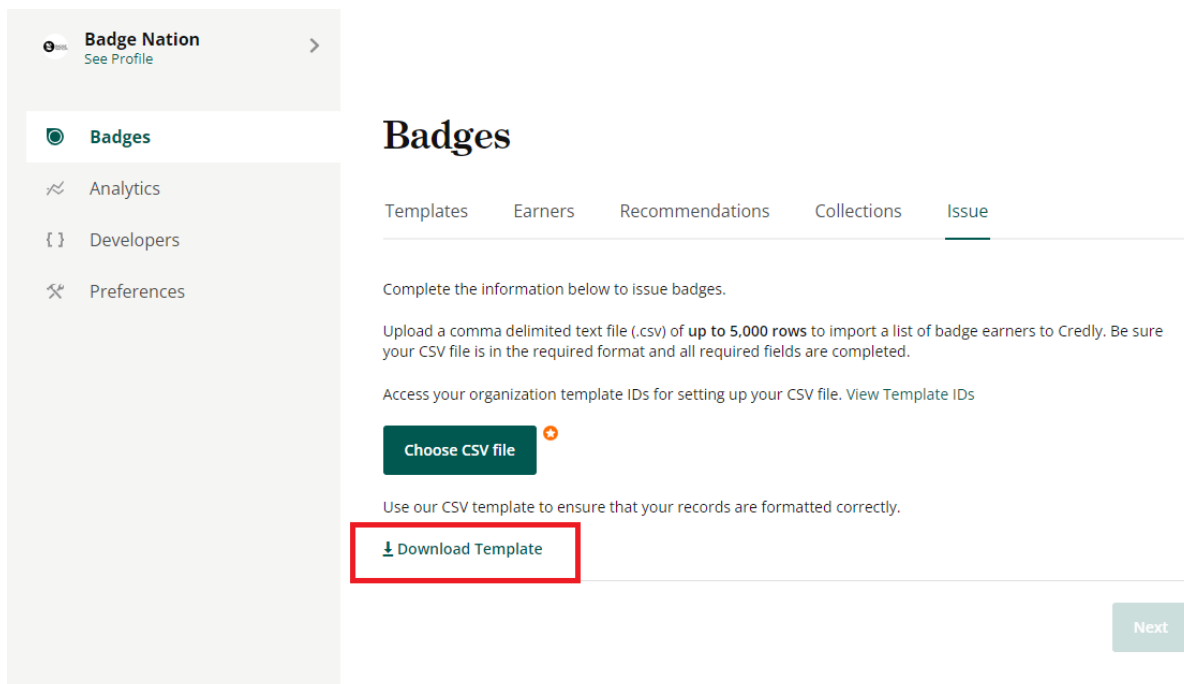
Please see our Collection Managers Training video which you might also find helpful to watch through if you haven't already – [bulk issuing is at 1min 50secs.](#)

1. To start, [Sign into Credly](#) to download a bulk issuing template file.

The bulk issuing template is the only document the platform will recognise when carrying out this process. To find this template, click on the 'Badges' bar on the left-hand side of your screen, and then click on the 'Issue' tab.



Then select 'Download Template':



2. This bulk issue template has the first line (Row 2) below column headers pre-populated as an example to help you to fill it in.

You'll notice that there are quite a few column headers in the sheet, however there are only a few that are essential for you to complete in the sheet, these are:

- Badge Template ID (Column A)
- Earner Email (Column B)
- Earner First Name (Column C)
- Earner Last Name (Column E)
- Date of Issue (Column F)

Most issuers will only use these columns, and possibly Earner Middle Name (Column D).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	
1	Badge Template ID	Earner Email	Earner First Name	Earner Middle Name	Earner Last Name	Date of Issue	Expires at	Issuer	Earner Group	Tag	Country	State or Province	Evidence ID	Evidence URL	Evidence Text	Evidence ID	Evidence ID	Evidence ID	Evidence ID	Evidence Description	
2	66a27a5f-1	user@example.com	Sample F	Sample M	Sample L	01/29/2017								My Optional URL	Optional Text	My Plain Text	My Plain Text	My ID	My ID	My ID	Description
3																					
4																					
5																					
6																					

3. To find the Badge Template ID, click on 'Badges' from the left-hand menu.

This will bring up a list of your badges, which are called 'Templates' in the Credly platform:

The screenshot shows the Credly 'Badges' interface. On the left, a sidebar menu has 'Badges' selected. The main area is titled 'Badges' and has tabs for 'Templates', 'Earners', 'Recommendations', 'Collections', and 'Issue'. Below the tabs is a search bar and a 'Filter' icon. It shows 'Showing 1-50 of 607' and a 'Create Template' button. A table lists badge templates:

Name	State	Updated	Issued
Smart Citizen Fab City Kit Training	Published	23 Feb 2022	14
Creative 3D Design: Introduction to digital design - Learn how to design creative forms and modify 3D objects	Published	22 Feb 2022	60

4. Select the badge you wish to bulk issue to find its Template ID. This is a string of numbers and letters after the text 'Template ID:'

Smart Citizen Fab City Kit Training

Details Insights Settings History

Template ID: 8cd36875-7497-4a79-91ed-c6b53b78428f

Issue



Issued by: Badge Nation

Earners of this badge have applied Arduino and Processing knowledge to assemble and code their own Smart Citizen Kit, an open-source sensor used to capture environmental data, and code a creative dashboard to visualise the data.

Skills

5. Copy and paste the Template ID into Column A of the spreadsheet.

Smart Citizen Fab City Kit Training

Details Insights Settings History

Template ID: 8cd36875-7497-4a79-91ed-c6b53b78428f

Issue



Issued by: Badge Nation

Earners of this badge have applied Arduino and Processing knowledge to assemble and code their own Smart Citizen Kit, an open-source sensor used to capture environmental data, and code a creative dashboard to visualise the data.

Skills

	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	66a27a5f-557d-4648-962f-54ad7ba16f9e	user@exa	Sample Fir	Sample M	Sample La	01/29/2017	
3	8cd36875-7497-4a79-91ed-c6b53b78428f						
4							
5							

6. Then add the email address (Column B)

	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	66a27a5f-557d-4648-962f-54ad7ba16f9e	user@exa	Sample Fir	Sample M	Sample La	01/29/2017	
3	8cd36875-7497-4a79-91ed-c6b53b78428f	user@exa	Example		Earned		
4							
5							

7. First name (Column C) and last name (Column E)

	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	66a27a5f-557d-4648-962f-54ad7ba16f9e	user@exa	Sample Fir	Sample M	Sample La	01/29/2017	
3	8cd36875-7497-4a79-91ed-c6b53b78428f	user@exa	Example		Earned		
4							
5							

8. And issuing date (Column F)

IMPORTANT NOTE: Credly reads dates in US format so it's important that you input the date you would like the badge to be issued as MM/DD/YYYY.

	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	66a27a5f-557d-4648-962f-54ad7ba16f9e	user@exa	Sample Fir	Sample M	Sample La	01/29/2017	
3	8cd36875-7497-4a79-91ed-c6b53b78428f	user@exa	Example		Earned	02/24/2022	
4							
5							
6							

9. If you are issuing the same badge to multiple earners, you can then simply copy and paste the template ID down the sheet into as many rows as needed.

Do not do this by dragging the cell down, as excel will auto-format the cells with consecutive numbers on the end and only the top one will be correct.

This also happens with dragging the date cells down, so it is better to either use Ctrl+D in the next row down to copy the above cell, or to copy (Ctrl+C) and then paste (Ctrl+V) as standard.

Your spreadsheet will now look something like this:

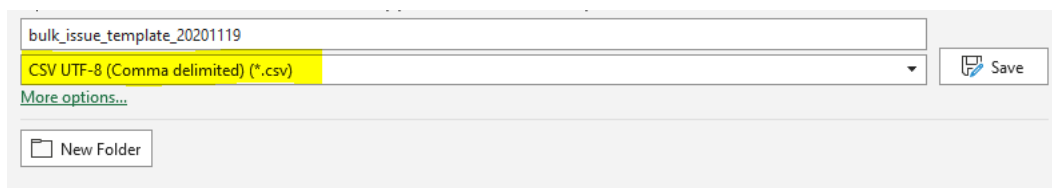
	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	66a27a5f-557d-4648-962f-54ad7ba16f9e	user@exa	Sample Fir	Sample M	Sample La	01/29/2017	
3	8cd36875-7497-4a79-91ed-c6b53b78428f	user@exa	Example		Earner	02/24/2022	
4	8cd36875-7497-4a79-91ed-c6b53b78428f	1user@ex	Example1		Earner1	02/24/2022	
5	8cd36875-7497-4a79-91ed-c6b53b78428f	2user@ex	Example2		Earner2	02/24/2022	
6	8cd36875-7497-4a79-91ed-c6b53b78428f	3user@ex	Example3		Earner3	02/24/2022	

10. If you have more than one badge to issue to each earner this can also be done on the same sheet, by creating another row with the same earner details but the Badge Template ID of the next badge.

11. Remember to remove the sample row provided once you are confident you have provided all the correct information in the compulsory columns:

	A	B	C	D	E	F	G
1	Badge Template ID	Recipient	Issued To	Issued To	Issued To	Issued at	Expires at
2	8cd36875-7497-4a79-91ed-c6b53b78428f	user@exa	Example		Earner	02/24/2022	
3	8cd36875-7497-4a79-91ed-c6b53b78428f	1user@ex	Example1		Earner1	02/24/2022	
4	8cd36875-7497-4a79-91ed-c6b53b78428f	2user@ex	Example2		Earner2	02/24/2022	
5	8cd36875-7497-4a79-91ed-c6b53b78428f	3user@ex	Example3		Earner3	02/24/2022	
6							

12. Once you have finished inputting all the information that you need into the sheet, save as a .CSV file ready for upload. If you have any earners with special characters in their names (for example Zöe), this can be retained by saving as CSV UTF-8 which you can select from the drop-down box when saving:



13. This can then be uploaded into Credly which will check your file is correct.

Under the 'Issue' tab (where you downloaded the CSV template) click the 'Choose CSV file' button and select the spreadsheet from your files.

The screenshot shows the 'Badges' section of a web application. On the left is a sidebar with navigation options: 'Badges' (selected), 'Analytics', 'Developers', and 'Preferences'. The main content area is titled 'Badges' and has a breadcrumb trail: 'Templates' > 'Earners' > 'Recommendations' > 'Collections' > 'Issue'. The 'Issue' tab is highlighted with a red box. Below the breadcrumb, there is a heading 'Complete the information below to issue badges.' followed by instructions: 'Upload a comma delimited text file (.csv) of up to 5,000 rows to import a list of badge earners to Credly. Be sure your CSV file is in the required format and all required fields are completed.' Below this is a link: 'Access your organization template IDs for setting up your CSV file. View Template IDs'. A dark green button with white text 'Choose CSV file' and a small orange plus icon is highlighted with a red box. Below the button is the text 'Use our CSV template to ensure that your records are formatted correctly.' and a link 'Download Template'. At the bottom right of the main content area is a light green button labeled 'Next'.

Credly does simple checks like making sure essential fields are filled in, that it recognises the date as a date, there aren't gaps at the start of any cells, and that emails follow a standard format (include @ for example), but it can't check for spelling errors so it's important to check these before you upload the file.

Once Credly is happy that the file is correct you can then click 'Next' to complete the bulk issue.