

BATCH ORDER UPLOAD GUIDE

This guide is designed to walk you through the process of submitting a batch upload for orders. If at any time you need assistance with submitting the request or have questions as you're doing so, please reach out to our One Source Client Relations Department at 402-933-9999, or tollfree at 800-608-3645, and choose option 1. Thank you!

1. Complete the Batch Order Upload Spreadsheet with the data for your applicants. For a batch order upload, all the columns need to be filled in with the applicant's exact information
 - a. Name(last) – applicant's legal last name
 - b. Name(first) – applicant's legal first name
 - c. SSN – do not list dashes
 - d. Address – list street address
 - e. City
 - f. State
 - g. Zip
 - h. Date of Birth – list the M-D-Y in the appropriate columns; for the month and date, include the leading zeroes as applicable
 - i. Example: list 01 for January, 02 for February
 - ii. Example: list 03 for the third, 04 for the fourth
 - i. Manager Name – must be the name of someone on the account (it can't be the "actual" manager's name if they aren't listed on the account)
 - j. Position Request – can be left blank
 - k. Package – needs to be the name of the package that needs to be ordered
 - l. Account – needs to be the ordering account
 - m. User – needs to be the username of the person uploading the order
2. Once the spreadsheet is complete, log into the www.secure.onesourcebackground.com website.
3. On the Home Page, complete the Switch User process by clicking on the **blue** here link. Then scroll down and click on the appropriate Account ID for the ordering account.

onesource
The Background Check Company

LIVE CHAT

Home Ordering Reports Docs & Forms My Account Logout

To enter an order, click on the switch user link **here**. This will allow you to navigate to your account page and chose your correct ordering account.

** Note: Failure to switch to appropriate account will result in inability to complete order processing.

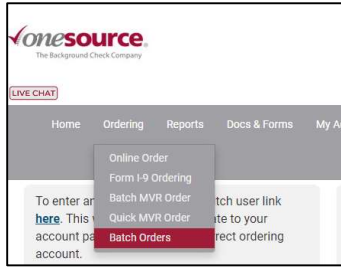
News

Welcome to One Source!

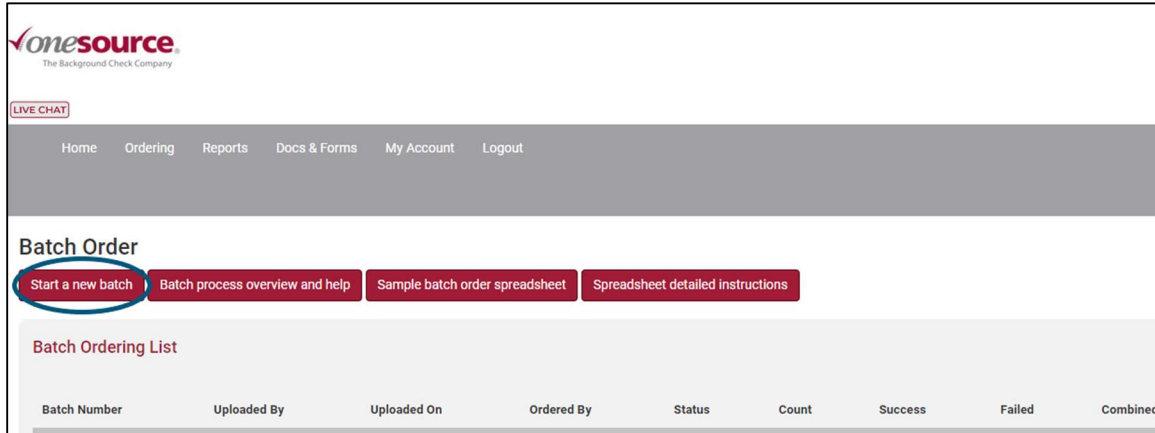
ENHANCE YOUR ACCOUNT
Are you wanting to streamline order entry? Reach out for to our Client Relations team to learn more about ordering options.

Would you like an account overview training or account refresher? Schedule training with our Client Relations team [here](#).

4. Hover over Ordering and then click on Batch Orders. A *Batch Ordering Help* page will pop up. You can read through and then close out of the screen.



5. On the Batch Order page, click on the **Start a New Batch** button.



6. The Batch Ordering Upload box will pop up.
 - a. For the *Default Package* box, ensure the package listed matches the package that was listed in Column P of the spreadsheet.
 - b. For the *Default FCRA Purpose* box, ensure the Employment by Hire or Contract is listed.
 - c. For the *Start Importing At* box, you'll choose the day and time that you want the order to upload into the system. As noted, if you don't select a time, the orders won't be uploaded into the system until after 7:00pm.
 - d. For the *Notification Upon Completion To* box, you'll choose who, if anyone, you want the notifications to go to.
 - e. For the File to Upload, click on the **Select File** button. Navigate to the spreadsheet on your computer. The **Select File** button will then change to an **Upload Orders** button. Click on that.

Batch Ordering Upload

Before uploading your batch order, please review the uploading process.


You can download an example template here: [batch order upload spreadsheet](#).

If you leave the package or FCRA purpose column empty, these values will be used:

Default Package:

Default FCRA Purpose:

If you leave the start time blank, the process of importing the orders will start at or after 7:00pm:

Start Importing At: 

Notification Upon Completion To:

By clicking on the 'Upload Orders' button I agree to pay for all charges incurred by the processing of the uploaded batch orders **agree**

Click here if you would like all common subject searches to be combined into one order. **Combine**

File to upload: No file selected

Fix any errors, and Click "I agree" above first

7. After uploading the batch, the red "Fix Any Errors" button will turn green. Click on the green **Upload Orders** button.