

Locations Data Instructions

In Stepwell, we use templated spreadsheets to load your data each year. These templates will allow you to control which locations are new or have closed, change groups of locations, and add each year's student list for review. Here are a few notes on the Locations template.

- The column order of your data must match the template. If it does not, this can lead to details for each location being in the wrong place.
 - This includes hidden columns. Hidden columns are still counted in the order of columns so our recommendation is to refrain from hiding columns.
- Each row should be a unique record for a new location.
- For Stepwell District, almost all locations should be Location Classification 5

Below are the requirements for each column:

Column Position	Column	Description	Required?	Conditional Requirements
A	Location Code	Unique code for the location	yes	
B	Location Name	Name of the location	yes	

C	Location Classification	District = 4 School = 5	yes	
D	Parent location code	Location code of the grouping above it	Sometimes	If the location is the highest type for the tenant, then this is not required. If the location is within another grouping (such as schools at a district), this is needed to tie them together
E	Location Type	If your organization classifies locations by different types, they can be added here. This would likely be provided with codes and a lookup table for the text definitions	No	
F	Grades	Tenant defined list of Grades. This is mostly applicable for Schools	No	
G	Phone	Location's primary phone number	No	
H	Email	Location's primary email	No	
I	Mailing Line 1	Location's Mailing Line 1	No	

J	Mailing Line 2	Location's Mailing Line 2	No	
K	Mailing City	Location's Mailing City	No	
L	Mailing State	Location's Mailing State	No	
M	Mailing Zip	Location's Mailing Zip	No	
N	Physical Line 1	Location's Physical Address Line 1	No	
O	Physical Line 2	Location's Physical Address Line 2	No	
P	Physical City	Location's Physical Address City	No	
Q	Physical State	Location's Physical Address State	No	
R	Physical Zip	Location's Physical Address Zip	No	
S	County	Location's county	No	
T	Website	Location's website	No	
U	Location ID	Location ID that is used for SSO	Sometimes	If Stepwell is connected to an SSO, this field can be used to control how location permissions are passed into Stepwell