

Customers

ADMIN: IMPORTING CUSTOMERS

The UMSS has Customer Import utility to make it easier to load many customers with all their information including assigned usernames and passwords. This is very convenient when adding many new customers for a Customer Private Store in which each new employee of a new customer must be entered and given a username and password.

CUSTOMER IMPORT FORMAT

The Customer Import uses a CSV File that can be created in MS Excel. There is a template for the Customer Import Spreadsheet at the support center [Customer Import Form](#).

The fields that are available for the import are:

- First name - [required]
- Last Name - [required]
- Company name
- Bill Address 1
- Bill Address 2
- Bill city
- Bill State
- Bill Zip
- Ship name
- Ship Address 1
- Ship Address 2
- Ship city
- Ship State
- Ship Zip
- Phone
- Email - [required]
- Username - [required]
- Password - [required]

* All fields not marked as required can be omitted

** Custom Customer fields are also importable but must be created prior to the Import in order for the fields to be available.

SETTING UP A CUSTOMER IMPORT

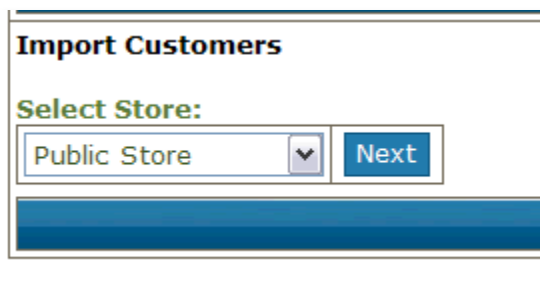
Download an [Excel Template for Customer Import from here.](#)

In the Admin, go to Customer and select "Import Customer:



Step 1: Select the Store.

Customers belong to Stores so you first need to select the Store (or subStore) into which you are going to import the customer list.



Step 2: Select the Layout. If there is no pre-existing layout, click "New Import Layout"

Import Customers

Select Layout:

Current Import Layout:

Step 3: Creating a New Layout:

New Layout:

Sort	Type	Field	Default
1	Main	<input type="text" value="Customer Type ID"/>	<input type="text"/>
2	Main	<input type="text" value="First Name"/>	<input type="text"/>
3	Main	<input type="text" value="Last Name"/>	<input type="text"/>

Give the new layout a name such as the one above "my new layout"

Not that there are 4 columns in the layout table.

1. The Sort column is preset and just numbers your lines for you.
2. The Type column tells you what type of field you are mapping. There are 4 types of "Types":
 - Main - these are built into the Customer Object and are available for every customer
 - Allowance Field - these are for working with Customer Allowances
 - Customer Custom Field - there may be none, one or many of these. These are the custom customer fields and are created by the Admin to handle any type of customer fields that are not built into the system.
 - Customer Specified Option - these are for importing customer specified options
3. The field column is used to select which field in the system is being mapped. The columns are mapped in the order that they appear in the CSV file. For example, if you have a list of names with passwords to import you may set up a spread sheet with:

column 1 = first name

column 2 = last name
column 3 = username
column 4 = password

Export the spreadsheet as a csv file.

Set up the import layout like this:

New Layout:

my New Layout			
Sort	Type	Field	Default
1	Main	First Name	
2	Main	Last Name	
3	Main	Username	
4	Main	Password	
5	Main	Email	

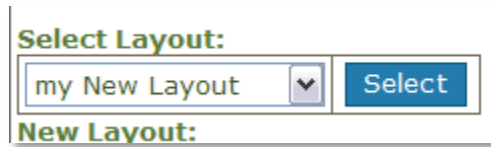
Note 1: The fields in the layout are matched 1:1 with the columns in the CSV file starting at the left of the CSV file and going to the right. Any fields in the Layout that are not matched with columns in the CSV file are merely ignored.

Note 2: The "Type" column in the will be modified to match the type of field that you select in the drop down box under field. For example, if we added a Customer Custom Field as the fifth column in our CSV file named 'site', the layout will reflect the type of field after the layout is saved:

Current Import Layout:

my New Layout			
Sort	Type	Field	Default
1	Main	First Name	
2	Main	Last Name	
3	Main	Username	
4	Main	Password	
5	Customer Custom Field	site	
6	Main	st	

4. After saving the new import layout, you must select it:



Select Layout:
my New Layout ▼ **Select**
New Layout:

5. After it is saved, scroll down to the bottom of the page and Browse for the CSV file.



77	Customer Specified Option	Landau: Size ▼	
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Save Current Import Layout **Delete Current Import Layout**

Import Section:

CSV File ky\Desktop\USERS.csv **Browse...**

Test **Import**

6. Before doing the actual import, you can test your file and layout by clicking on the 'Test' button. A positive test result will return "Success". A negative result will provide feedback as to what must be modified.

7. After a positive test, scroll to the bottom of the page and click the "Import" button. After the file is imported you are done.

Required Fields for a Customer are:

- First Name
- Last Name
- Username
- Password
- email