Importing

Last Modified on 01/29/2019 4:30 pm EST

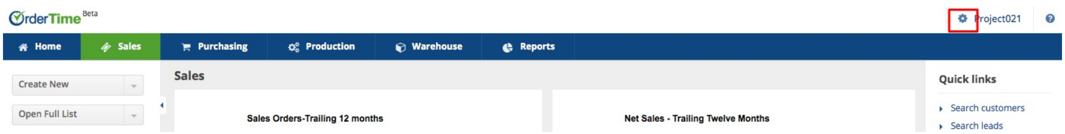
Overview

Our software provides you with an easy-to-use tool that will help import multiple records at the same time using CSV files.

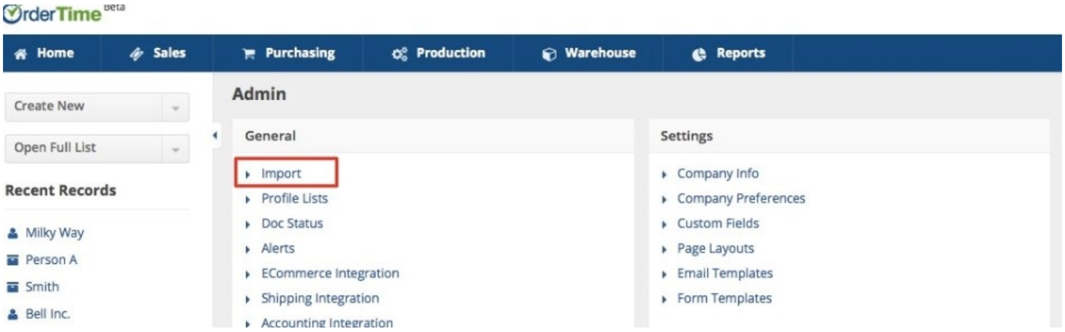
Importing the File

After creating and filling out your CSV file (spreadsheet), you can now import the file by using the **Import** tool.

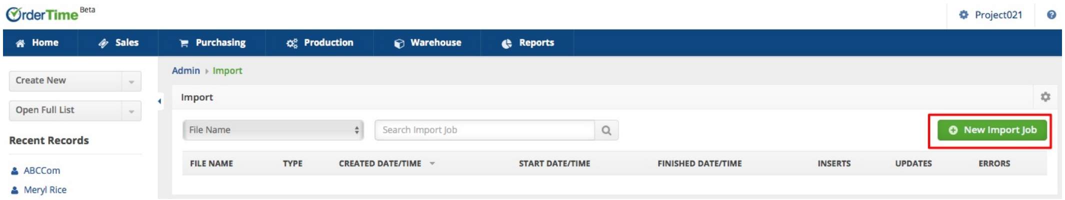
1. Click on the *Gear* icon (near the upper-right corner of the screen). This will lead you to the **Admin** page.



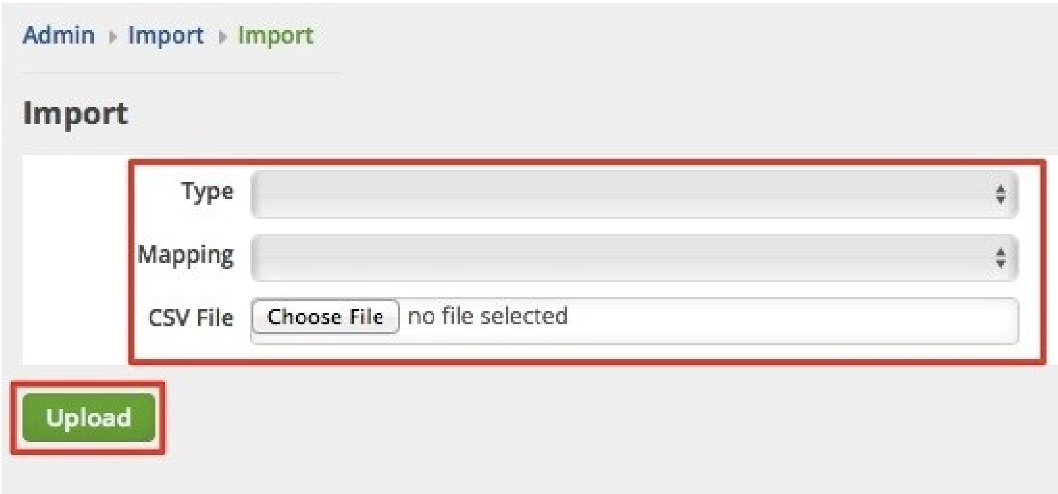
2. Click **Import** under the **General** section.



3. Click the **+New Import Job** icon to the right side of the screen to begin a new import job.



4. Once the new Import screen opens, select the **Type of Import** you are completing, the **Mapping** fields for the item (if applicable), and the **CSV File** that will be used.
5. Click **Upload**.

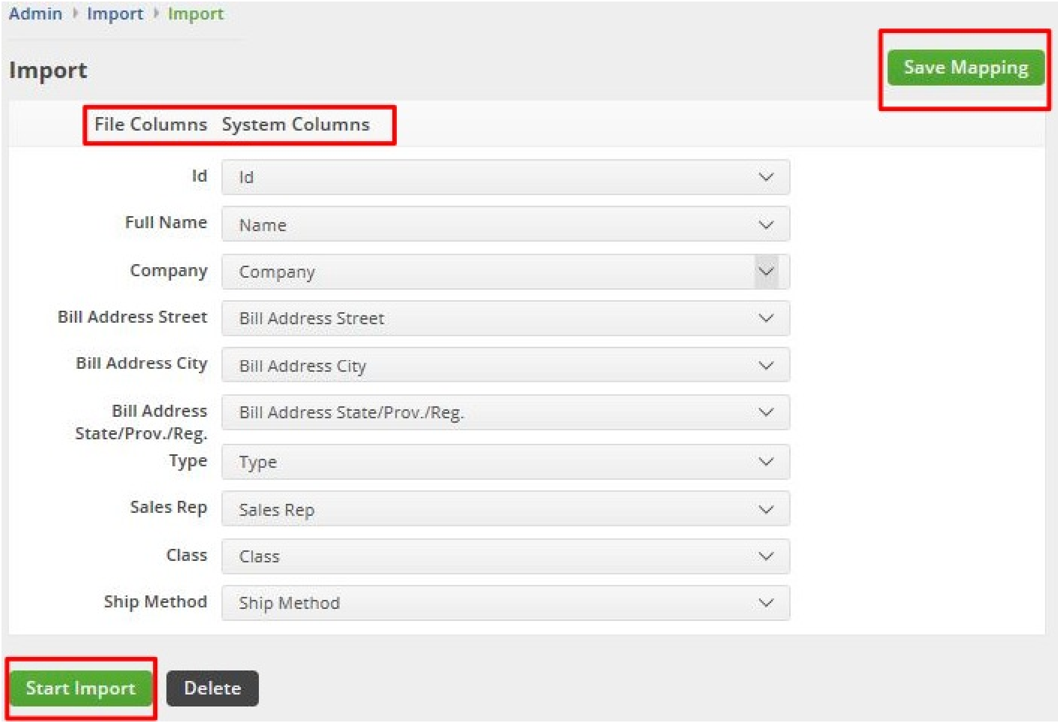


Mapping Fields

Mapping allows you to specify where to import the information by matching the fields in your system columns to the fields of the source data that you are importing. The system automatically maps any columns that have the exact name in the file columns. You will have to manually map the fields that have different names.

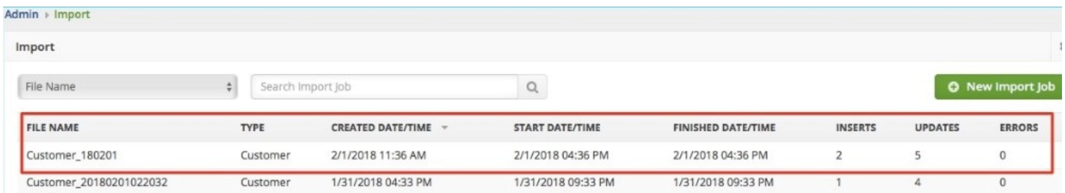
1. When you click **Upload** during import, the next page will display the section where you can set your mapping.

2. Select the appropriate fields from the **System Columns** by using the drop-down lists. ***Note:*** In the event that you are mapping initially, you have the option to leave out a required field blank (e.g. Name) as long as you have the **ID**.



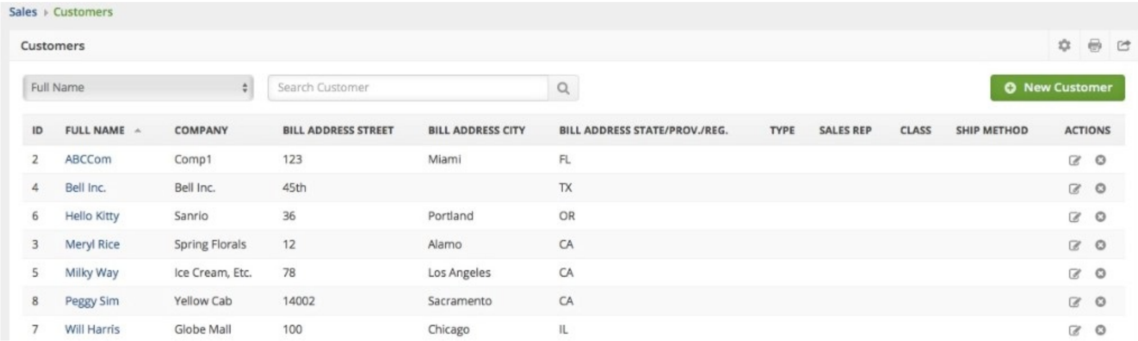
3. Click **Save Mapping**.
4. Type a "mapping name" in the field and then, click **Save**. The mapping will be stored and can be used for future import jobs.

5. Click **Start Import**. While the import job is running, the Import tool validates the information of the import file. The system will notify you through e-mail when the import job is complete. The Import page will refresh with information about the duration of the import job, number of inserts, number of updates and any errors that the system detected during the import operation.



Click the number under the Errors column to see additional information about the errors and any corrective actions that you need to take.

To view and check your imported list, click the *Open Full List* drop-down menu on the left side of your screen and select the corresponding List (e.g. Customers, Vendors, Location). *Note: Move the scrollbar down for more options.*



ID	FULL NAME	COMPANY	BILL ADDRESS STREET	BILL ADDRESS CITY	BILL ADDRESS STATE/PROV./REG.	TYPE	SALES REP	CLASS	SHIP METHOD	ACTIONS
2	ABCCom	Comp1	123	Miami	FL					
4	Bell Inc.	Bell Inc.	45th		TX					
6	Hello Kitty	Sanrio	36	Portland	OR					
3	Meryl Rice	Spring Florals	12	Alamo	CA					
5	Milky Way	Ice Cream, Etc.	78	Los Angeles	CA					
8	Peggy Sim	Yellow Cab	14002	Sacramento	CA					
7	Will Harris	Globe Mall	100	Chicago	IL					