Import Manager - Customer And Address Imports

Cavallo Support - 2025-06-12 - Utilities

Overview

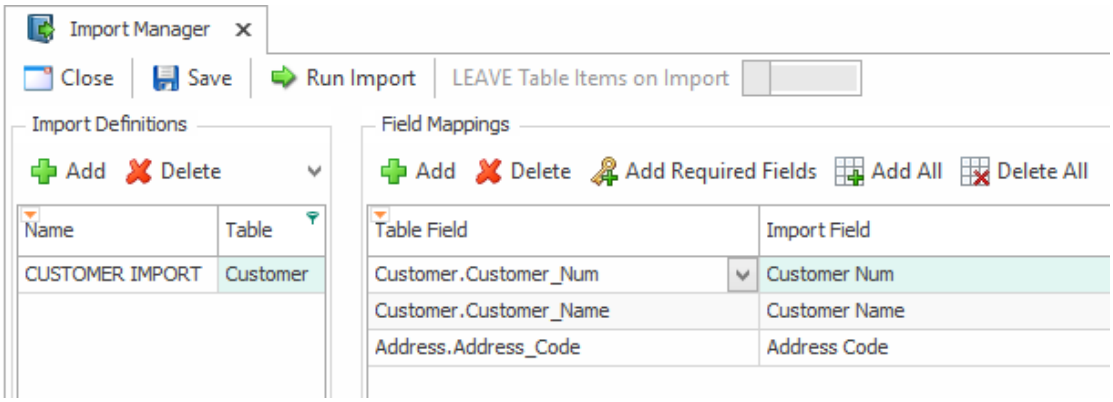
SalesPad 5.4.8 introduced the ability to import customers and their addresses into SalesPad from a spreadsheet via Import Manager. This can be used for a variety of functions such as importing a new customer with their primary address, updating an existing customer, importing a new address for an existing customer, and updating an existing customer address.

This article assumes that the reader has some familiarity with Import Manager. For general information on how to use Import Manager, refer to Import Manager.

Setup

In Import Manager, create a new import definition and select Customer as the table. Then create field mappings to map SalesPad fields to columns in the spreadsheet.

Various customer and customer address fields are available, including user fields for both business objects. Customer fields are prefixed with 'Customer' while Customer Address fields are prefixed with "Address".

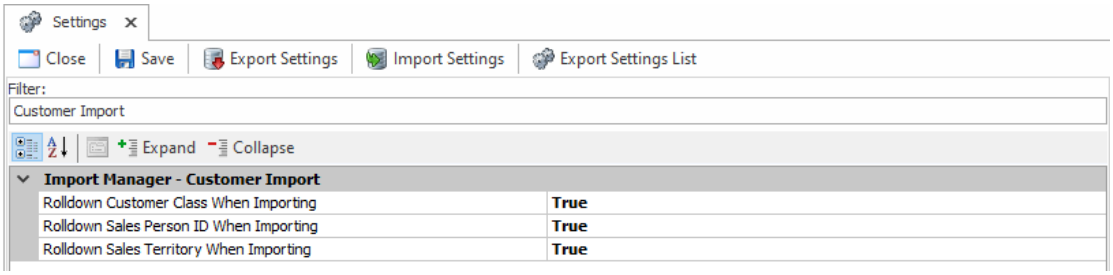


There are only 3 required fields, and they are only required in certain situations:

- Customer.Customer_Num is almost always required. The only situation where this is not needed is when a new customer should be created and the Customer Num should be generated automatically.
- Customer.Customer_Name is required when creating a new customer.
- Address.Address_Code is required when creating a new customer, creating a new address for a customer, or updating an address.

Settings

The Settings module has a few settings which affect the Customer Import.



Rolldown Customer Class When Importing - If set to 'True', customer imports which set the Customer Class field will copy the Customer Class's fields to the Customer. NOTE: If the import explicitly sets a rolldown field such as Price Level, Import Manager will use the import's value for that field instead of the Customer Class's value for that field.

Rolldown Sales Person ID When Importing - If set to 'True', customer imports which set a customer's Sales Person ID field will update all of that customer's addresses to use that Sales Person ID.

Rolldown Sales Territory When Importing - If set to 'True', customer imports which set a customer's Sales Territory field will update all of that customer's addresses to use that Sales Territory.

Usage

The Customer Import supports multiple use cases which are outlined in the following sections.

This import looks at the Customer Num and Address Code fields in each row of the spreadsheet to determine which use case each row falls under. Be careful to supply the correct Customer Num and Address Code data for each row; otherwise the import may incorrectly create new customers or update the wrong customers.

In all of these use cases, data is imported via preparing a spreadsheet and then clicking the Run Import button in Import Manager.

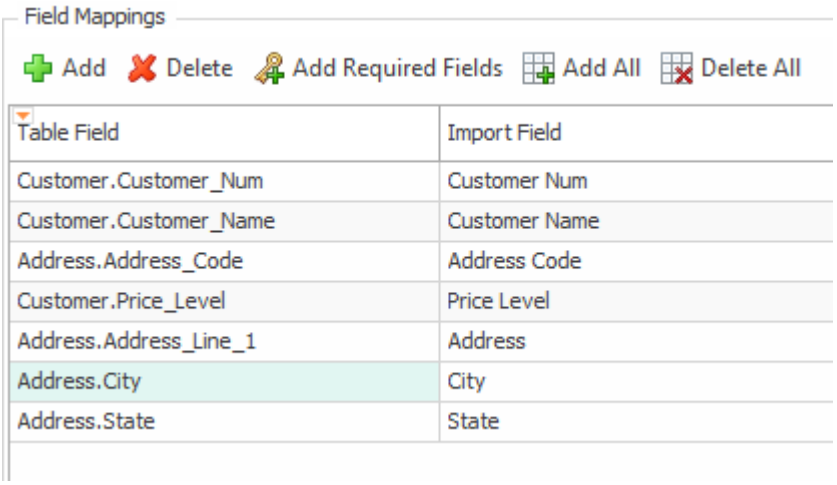
Create a Customer

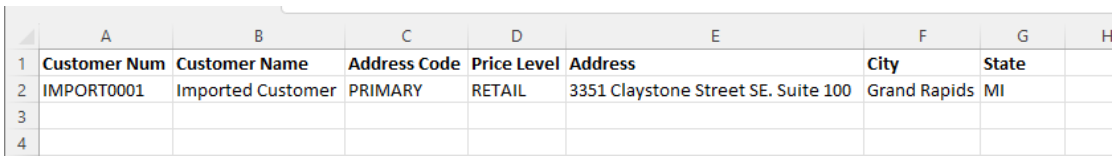
The Customer Import can create new customers in SalesPad. Creating a customer must be done alongside creating a new primary customer address. SalesPad will automatically mark that address as the customer's Primary, Bill To, Ship To, and Statement To address.

The only required fields are Customer Num, Customer Name, and Address Code. Customer Num must have a column in the spreadsheet, but a row can leave that column blank to automatically generate the Customer Num. If a customer should be created with multiple addresses, then the Customer Num must be supplied for those rows so that the import can tell that all of the addresses are for the same customer. Alternatively, the customer can be imported first in one import step, then a second import file can be manually updated with the automatically assigned Customer Num prior to importing those secondary addresses.

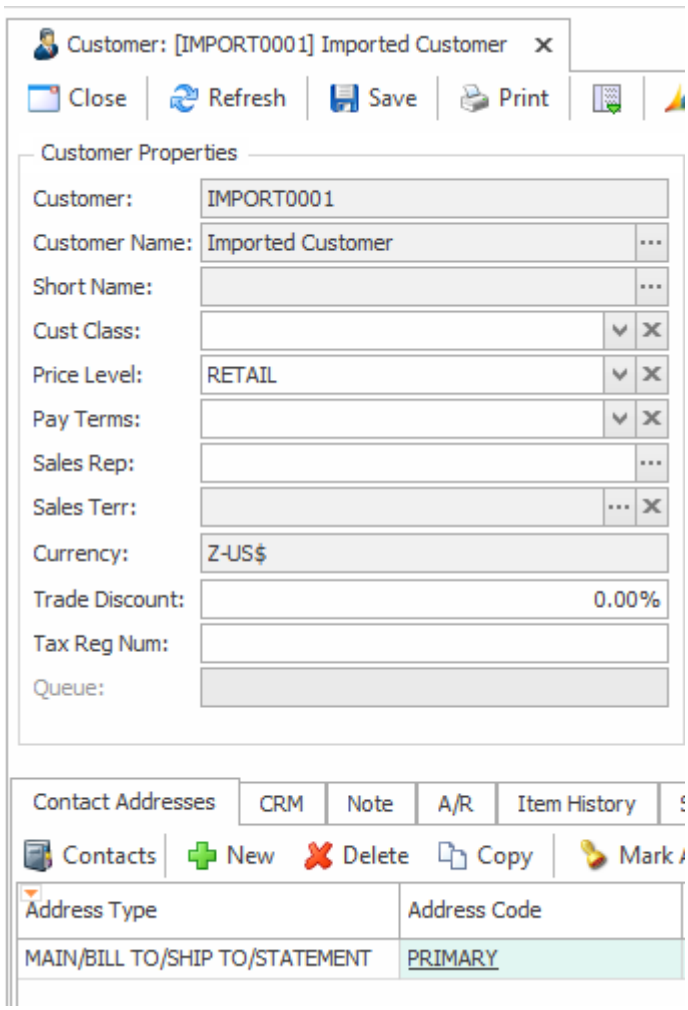
Example

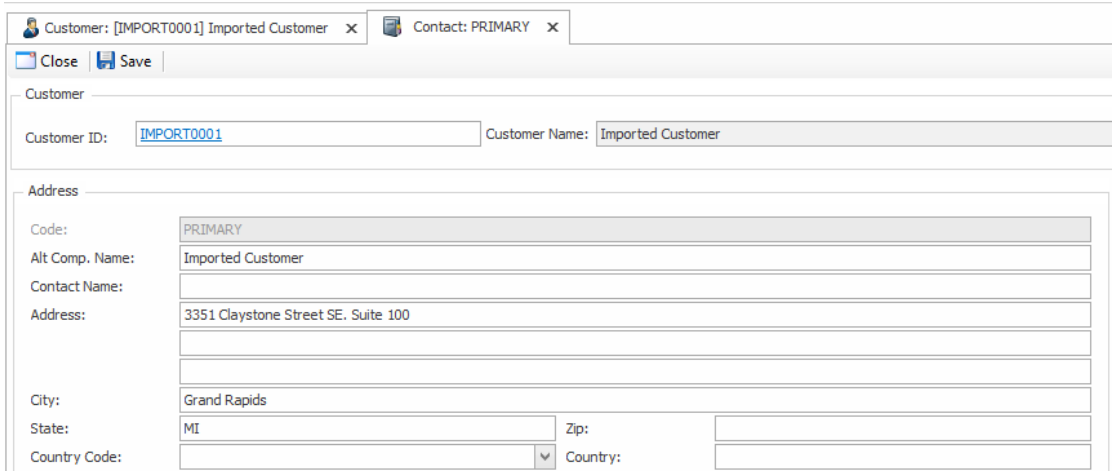
Using the following import definition and the following spreadsheet will create a customer and customer address which look like the following:





	A	B	C	D	E	F	G
1	**Customer Num**	**Customer Name**	**Address Code**	**Price Level**	**Address**	**City**	**State**
2	IMPORT0001	Imported Customer	PRIMARY	RETAIL	3351 Claystone Street SE. Suite 100	Grand Rapids	MI
3							
4							





Update a Customer

The Customer Import can update customers which are already in SalesPad. The Customer Num field is required and indicates which customer to update.

No address fields are required if only customer fields will be updated. However, it is also possible to update a customer alongside creating or updating a customer address. To do both, include the Address Code field along

with any address fields that should be imported.

Create a Customer Address for a Customer

The Customer Import can create a new customer address for an existing customer in SalesPad. In this scenario, the Customer Num and Address Code fields are required, with the Customer Num field indicating which customer should be assigned to the new address.

No customer fields other than Customer Num are required if the intention is just to create an address. However, it is possible to also update customer fields while creating an address if desired.

Update a Customer Address

The Customer Import can update customer addresses which are already in SalesPad. The Customer Num and Address Code fields are required and indicate which customer address to update.

No customer fields other than Customer Num are required if the intention is just to update an address. However, it is possible to also update customer fields while updating an address if desired.