



Import Manager - Customer And Address Imports

Megan De Freitas - 2024-12-03 - Utilities

Overview

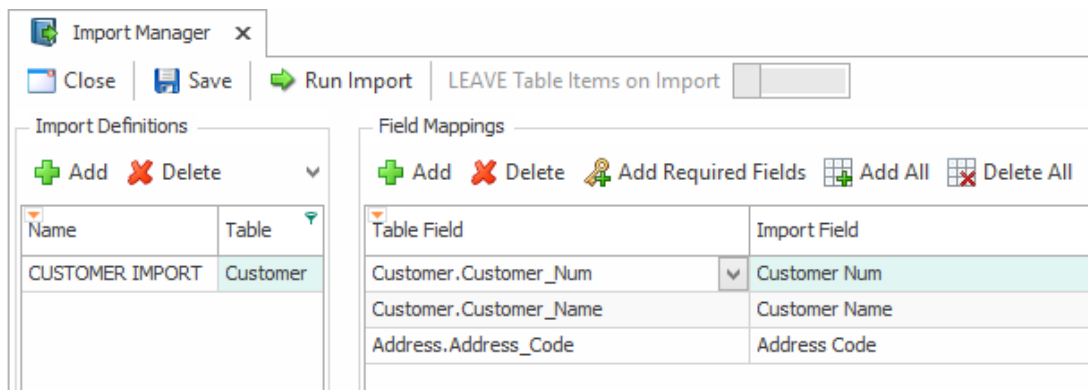
SalesPad 5.4.8 introduced the ability to import customers and their addresses into SalesPad from a spreadsheet via Import Manager. This can be used for a variety of functions such as importing a new customer with their primary address, updating an existing customer, importing a new address for an existing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

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".

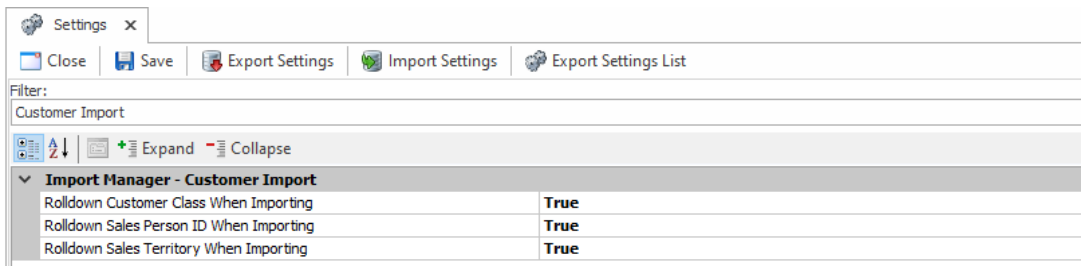


There are only 3 required fields, and they are only required in certain situations:

- 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:

Field Mappings












 Add
  Delete
  Add Required Fields
  Add All
  Delete All

Table Field	Import Field
Customer.Customer_Num	Customer Num
Customer.Customer_Name	Customer Name
Address.Address_Code	Address Code
Customer.Price_Level	Price Level
Address.Address_Line_1	Address
Address.City	City
Address.State	State

	A	B	C	D	E	F	G	H
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								

Customer: [IMPORT0001] Imported Customer ✕

 Close
  Refresh
  Save
  Print
 


Customer Properties

Customer: IMPORT0001

Customer Name: Imported Customer ...

Short Name: ...

Cust Class: ▼ ✕

Price Level: RETAIL ▼ ✕

Pay Terms: ▼ ✕

Sales Rep: ...

Sales Terr: ... ✕

Currency: Z-US\$






Trade Discount: 0.00%

Tax Reg Num:

Queue:

Contact Addresses

CRM Note A/R Item History

 Contacts
  New
  Delete
  Copy
  Mark

Address Type	Address Code
MAIN/BILL TO/SHIP TO/STATEMENT	PRIMARY

Customer: [IMPORT0001] Imported Customer x Contact: PRIMARY x

Close Save

Customer

Customer ID: IMPORT0001 Customer Name: Imported Customer

Address

Code: PRIMARY

Alt Comp. Name: Imported Customer

Contact Name:

Address: 3351 Claystone Street SE, Suite 100

City: Grand Rapids

State: MI Zip:

Country Code: Country:

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.