Importing Customers into Counter Intelligence Office v11

The **Import Customers** function allows for Customers to be imported into Counter Intelligence Office from an external source.

TIP: It is highly recommended that a backup is taken prior to updating the database.

The Customers Import file **MUST** be in comma separated file format (**.CSV**).
To create the CSV file, prepare your Customers Import in Excel or a similar spreadsheet, and export the file into a CSV format.

The column headings **MUST** match exactly to the field names specified in the table below.
It is not necessary to have all the fields specified, but you **MUST** have the field names that are required.
It does not matter if which order they are sequenced.

The following is a list of supported **Field Names**, the names are not case-sensitive.
Extra fields are allowed, but are ignored by import function.

Field	Reqd	Len	Description
Code	Yes	8	Specifies the **customer code**. If the code specified does not exist, a new customer is created. If the code already exists and was not created during the import the existing customer is updated to reflect the data in the import sheet. Single quotes (') are not permitted.
LookUpNumber	No	6	It will prompt to allow to generate if there is no column in Spreadsheet
Group	No	4	Specifies the group code for which the customer is being created. If this column is not included, the user **must** select an existing group from a drop down list at import time. If the group is specified, but no group with that code can be found in Counter Intelligence, a **new group** is created.
DefaultBranch	No	3	Specifies the branch code for which the customer is being created. If this column is not included, the user may select an existing branch from a drop down list at import time. If the branch is specified, but no branch with that code can be found in Counter Intelligence, the line is ignored.
DefaultEmployee	No	7	Specifies the employee code for which the customer is being created. If this column is not included, the user may select an existing employee from a drop down list at import time. If the employee is specified, but no employee with that code can be found in Counter Intelligence, the line is ignored.
AccountType	No	1	B=Balance Forward, O=Open Item, R=Revolving Credit and M=Marketing Only. If this column is not included, Office will record the Account Type as O (Open Item).
TradingName	No	40	Trading name of customer.
ContactTitle	No	40	Dr. , Miss , Mr. , Mrs. , Ms. and Prof.
ContactFirstName	No	40	First name of contact person.
ContactLastName	No	40	Last name of contact person.
PhoneHome	No	20	Home phone number.
PhoneWork	No	20	Work phone number.
PhoneMobile	No	20	Mobile phone number.
Fax	No	20	Facsimile number.

Field	Reqd	Len	Description
Email	No	60	Email address. Multiple email addresses can be imported separated by a ;.
Website	No	255	Website address.
Street	No	255	Address Street/Suburb.
City	No	40	Address City.
PostCode	No	12	Address Post Code of address.
Country	No	40	Address Country.
DeliveryStreet	No	255	Delivery address street/suburb.
DeliveryCity	No	40	Delivery address city.
DeliveryPostCode	No	12	Post Code of delivery address.
DeliveryCountry	No	40	Delivery address country.
Note	No	80	Note.
TermCode	No	1	P='of the Month Following Invoice Date' or D='Days After Date of Invoice'.
TermDays	No	4	If term code is P, term days must be between 1 and 31. If term code is D, term days must be between 0 and 9999. If this column is not included, Office will record the Term Days as 0.
CreditLimit	No	9	Amount of credit limit. If this column is not included or blank, Office will record the Credit Limit as 0.
AllowMarketing	No	1	0=not allow marketing and 1=allow marketing. If Account Type is M then Allow Marketing should always be set to allow marketing (1). If this column is not included, Office will record the Allow Marketing as 0.
MarketingField1	No		Customer marketing field 1 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField2	No		Customer marketing field 2 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField3	No		Customer marketing field 3 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField4	No		Customer marketing field 4 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField5	No		Customer marketing field 5 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField6	No		Customer marketing field 6 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField7	No		Customer marketing field 7 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField8	No		Customer marketing field 8 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField9	No		Customer marketing field 9 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.
MarketingField10	No		Customer marketing field 10 value. Length or field type will depend on settings. If type of marketing field is date, 'dd/mm/yyyy' format must be used.

Importing

When importing, Counter Intelligence displays a grid of the fields found in the specified import file.

An audit report is generated.

Note: The Delivery Street may be spread over multiple lines to a maximum 255 characters. If you need to concatenate multiple lines – eg Cell A2=Unit 27 Cell A3="The Mews Apartments" Cell A4="123 Vincent Street" then build a formula for the DeliveryStreet field of:
A2&CHAR(10)&A3&CHAR(10)&A4. The Char(10) will split them onto multiple lanes.