

Import customer allocations

You can import a file with customer allocations to add multiple allocations in an easy way instead of adding them individually to T1.

Make sure to have the customer allocations list in an Excel sheet with the following columns: allocation group name, customer code, minimum quantity, maximum quantity, and status. Below is an example of the Excel sheet format:

	A	B	C	D	E	F	G
1	Allocation Group	Customer Code	Min Quantity	Max Quantity	Status		
2	Allocation Group 2	11111	50	200	1		
3	Allocation Group 3	11111	100	400	0		
4	Allocation Group 2	22222	50	500	1		
5	Allocation Group 3	33333	200	800	1		
6	Allocation Group 4	44444	50	200	1		
7							

Customer Allocations

The status column can have the following values:

- 0 which means that this allocated quantity is inactive, and you can allocate it to another group
- 1 which means that this allocated quantity is active and assigned to this customer

To import the file, follow these steps:

1. Click the **Import** button, the following window appears:

Import Data [X]

1 **File** — 2 Sheet — 3 Mapping — 4 ☒ Filter — 5 Validation — 6 ☒ Information

☐ Last Used File
☒ **New File**

Filename: [none] **SELECT...**

BACK **NEXT**

2. Click **Select** to browse for the file you want to import,
3. Select the file then click **Open**, the name of the file you selected appears in its field,
4. Click **Next**, the following window appears:

Import Data [X]

☒ File — ☒ Sheet — 3 **Mapping** — 4 ☒ Filter — 5 Validation — 6 ☒ Information

Please select the sheet that contains the data you wish to import

Customer Allocations ▼

BACK **NEXT**

You can click **Back** to return to the previous window.

5. Select the sheet you want from the dropdown list in case your file contains more than one sheet,
6. Click **Next**, the following window appears:

Import Data [X]

✓ File — ✓ Sheet — **3 Mapping** — ✓ Filter — 5 Validation — ✓ Information

Please select the columns in your sheet that match each of the following fields. All fields marked with a * are mandatory and must be mapped before continuing.

🔍 Search

Customer Code* = Customer Code *

Allocation Group Name* = Allocation Group Name *

[BACK] [NEXT]

7. Select the column of the sheet that matches each field, you can search for the field you want using the search field, then click **Next**, the following window appears:

Import Data [X]

✓ File — ✓ Sheet — ✓ Mapping — ✓ Filter — **5 Validation** — ✓ Information

Would you like to import all the rows in the sheet or only the rows that match a specific criteria?

☒ Import All Rows

☐ Import Only the Rows that match the following criteria:

[BACK] [NEXT]

8. Click the radio button next to the import method, either all rows or rows that match certain criteria, a validation window appears informing you if records are valid or not, if not, you need to fix the sheet then import the file again,
9. Click **Next**, the following window appears:

The screenshot shows the 'Import Data' window with the 'Validation' step selected. The progress bar at the top shows 'File', 'Sheet', 'Mapping', 'Filter', 'Validation', and 'Information' with checkmarks. The main text states: 'The sheet will be processed to identify if all the rows are valid to be imported'. Below this, the status is 'Finished'. The 'Total Valid Rows' is 5, 'Total Invalid Rows' is 0, and 'Total Skipped Rows' is 0. A message with a checkmark icon says: 'No issues were detected in your source file. The data is ready to be submitted.' At the bottom are 'BACK' and 'NEXT' buttons.

Field	Value
Status:	Finished
Total Valid Rows:	5
Total Invalid Rows:	0
Total Skipped Rows:	0

✓ No issues were detected in your source file. The data is ready to be submitted.

The validation window shows the status of the import process, the total number of valid rows, and the total number of invalid and skipped rows. The above example shows that all the rows are valid.

10. Click **Next**, the following window appears:

The screenshot shows the 'Import Data' window with the 'Information' step selected. The progress bar at the top shows 'File', 'Sheet', 'Mapping', 'Filter', 'Validation', and 'Information' with checkmarks. The main text states: 'Your data is ready to be imported, please click on the Submit button below to submit the request to the server.' At the bottom are 'BACK' and 'SUBMIT' buttons.

11. Click **Submit**, the progress is displayed,

12. Wait until the job is finished, then refresh the page, values are imported.

Notes:

- If changes are not reflected on the page, refresh the browser by pressing F5.
- If any of the records are invalid, you can skip them by clicking the checkbox next to

Skip invalid rows as shown in the below example:

Import Data

✓ File

✓ Sheet

✓ Mapping

✓ Filter

5 Validation

✓ Information

Total Valid Rows:

1

Total Invalid Rows:

2

Total Skipped Rows:

0

ⓘ There are currently some invalid rows, please rectify these issues before continuing.

GET RESULT

☐ Skip invalid rows

BACK

NEXT

The **Next** button is activated, and you can import the valid rows.