

Import linked customers

To import a file with linked customers, make sure to have the customers listed in an Excel sheet with the following columns: Customer Number, Wholesale Price Group, Wholesale Alternative Price Group (optional), Retail Price Group, Retail Alternative Price Group (optional), Account Manager 1, Account Manager 2, and Order Price Group as shown in the below example:

	A	B	C	D	E	F	G	H
1	Customer Number	Wholesale Price Group	Retail Price Group	Account Manager 1	Account Manager 2	Account Manager 3	Order Price Group	
2	11111	Wholesale Price	Retail Price	john.smith@trasix.com	ian@trasix.com	faris.saeed@trasix.com	Retail Price	
3	22222	Wholesale Price	Retail Price	ian@trasix.com	john.smith@trasix.com	faris.saeed@trasix.com	Wholesale Price	
4	33333	Wholesale Price	Retail Price	john.smith@trasix.com	account.mngr1@trasix.com	ian@trasix.com	Retail Price	
5	44444	Wholesale Price	Retail Price	ian@trasix.com	ian@trasix.com	faris.saeed@trasix.com	Wholesale Price	
6								

Notes:

- Price Groups should be active for the selected catalog, otherwise, the import process fails.
- It is mandatory to fill values for “Account Manager 1” and you can add up to seven account managers for each customer.
- To import a file with linked customers, follow these steps:

Click to import the file, the following window appears:

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

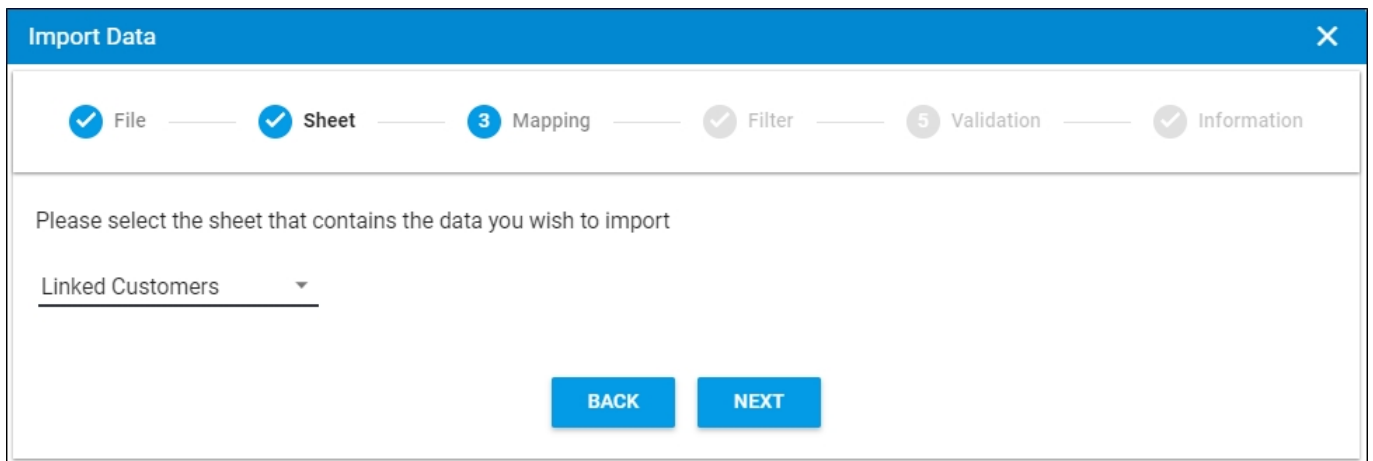
Import Data

1 File — 2 Sheet — 3 Mapping — Filter — 5 Validation — Information

Last Used File
 New File

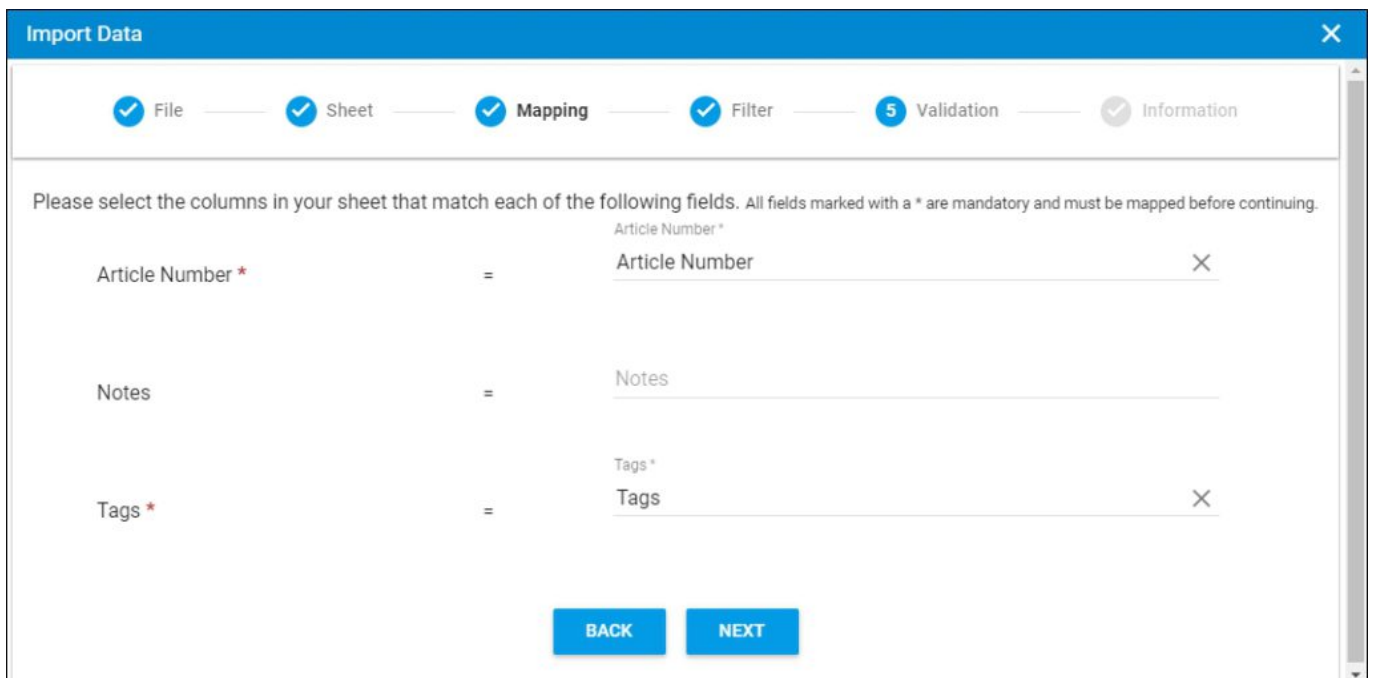
Filename: [none]

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, click **Next**, the following window appears:



The screenshot shows the 'Import Data' window with a progress bar at the top. The steps are: File (checked), Sheet (checked), Mapping (3), Filter (checked), Validation (5), and Information (checked). The main area contains the text 'Please select the sheet that contains the data you wish to import' and a dropdown menu with 'Linked Customers' selected. At the bottom are 'BACK' and 'NEXT' buttons.

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



The screenshot shows the 'Import Data' window with the progress bar updated: File (checked), Sheet (checked), Mapping (checked), Filter (checked), Validation (5), and Information (checked). The main area contains the text '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.' Below this are three rows for mapping: 'Article Number *' mapped to 'Article Number', 'Notes' mapped to 'Notes', and 'Tags *' mapped to 'Tags'. Each mapping has an equals sign and a close button (X). At the bottom are 'BACK' and 'NEXT' buttons.

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

6. 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 ✕

✓ 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.

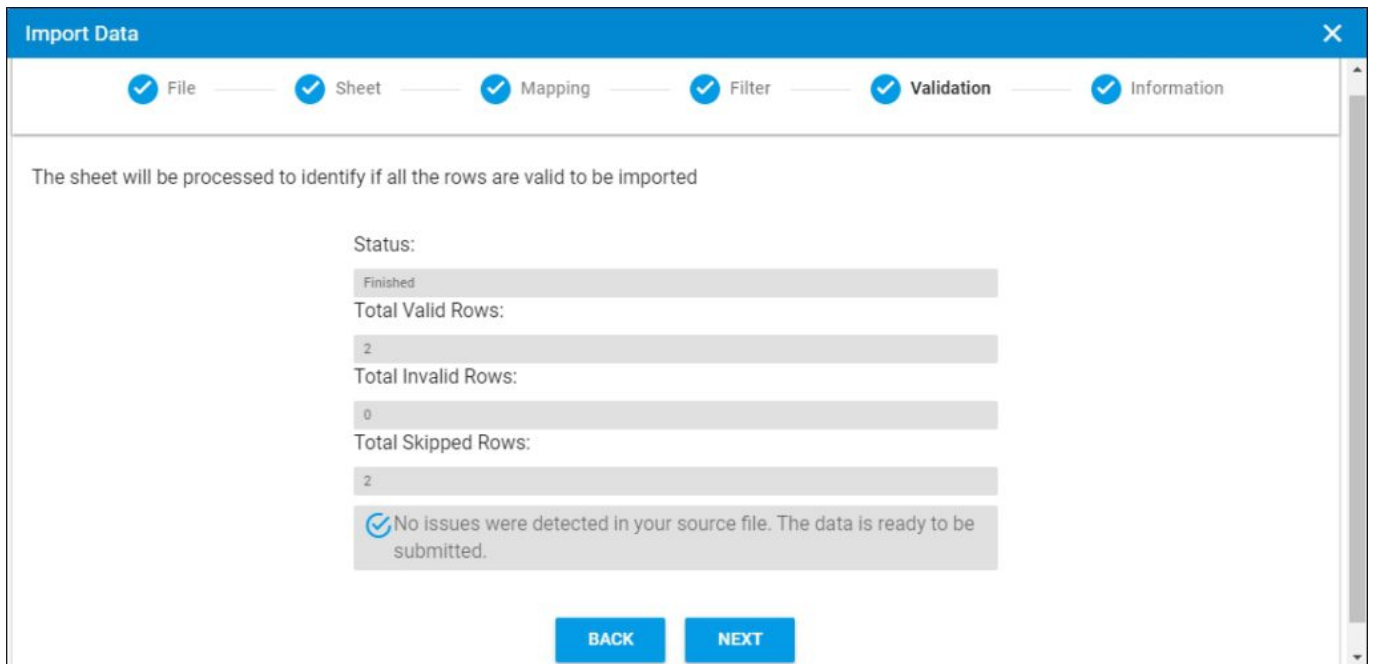
🔍 Search

Customer Id = Customer Id

Customer Number* = Customer Number*

BACK **NEXT**

7. 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,
8. Click **Next**, the following window appears:



The validation step lists the status of the import process, the total number of valid rows, and the total number of invalid and skipped rows. If there is an error in the sheet you are trying to import such as an empty account manager or an invalid price group the validation window will return an error and you need to fix the records with invalid data then import the sheet again.

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

Import Data ✕

File Sheet Mapping Filter Validation Information

Your data is ready to be imported, please click on the Submit button below to submit the request to the server.

10. Click **Submit**, the progress is displayed,
11. Wait until the job is finished, then refresh the page, the imported values are listed.

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.