

Import customer segmentation - Linear view

To import a file with customer segmentations while using the linear view, make sure to have the customers listed in an Excel sheet with the following columns: Customer Number, Segmentation Name, and Status as shown in the below example:

	A	B	C	D	E	F
1	Customer Number	Segmentation Name	Status			
2	11111	Segmentation-1	1			
3	22222	Segmentation-1	0			
4	22222	Segmentation-2	1			
5	11111	Segmentation-2	1			
6						

Customer Seg - Linear

The segmentation that is marked with “0” or “No” will not be included in the linear view list, but the segmentation will be marked with a “No” in the tabular list. Customers can only view articles within the same segmentation.

To import a file with segmentations, follow these steps:

1. Click to import the file, the following window appears:

Import Data

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 —
 Filter —
 5 Validation —
 Information

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

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

5. Select the sheet you want from the dropdown list in case your Excel 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 Number* = Customer Number*

Segmentation Name* = Segmentation Name*

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

✓ 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:

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.

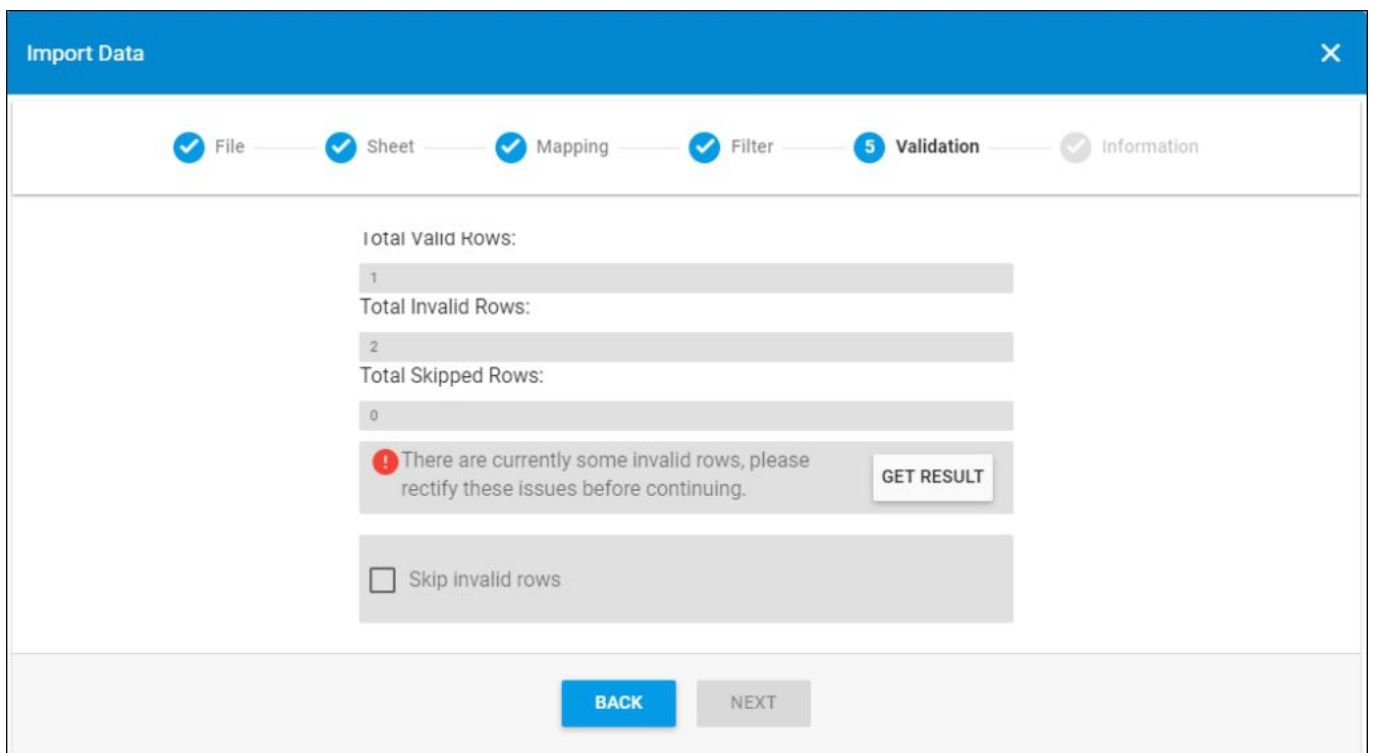
BACK SUBMIT

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 **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:



The screenshot shows a 'Import Data' window with a progress bar at the top. The progress bar has six steps: 'File', 'Sheet', 'Mapping', 'Filter', 'Validation', and 'Information'. The 'Validation' step is currently active and highlighted with a blue circle and the number '5'. Below the progress bar, the following statistics are displayed:

- Total Valid Rows: 1
- Total Invalid Rows: 2
- Total Skipped Rows: 0

Below the statistics, there is a red warning icon and a message: 'There are currently some invalid rows, please rectify these issues before continuing.' To the right of this message is a 'GET RESULT' button. Below the message is a checkbox labeled 'Skip invalid rows', which is currently unchecked. At the bottom of the window, there are two buttons: 'BACK' (which is highlighted in blue) and 'NEXT' (which is disabled).

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