

Import customer segmentation - Tabular view

To import a file with customer segmentations, make sure to have the customers listed in an Excel sheet with the following columns: Customer Number, Segmentation-1, Segmentation-2 and so on, depending on the segmentations defined for the selected catalog as shown in the below example:

	A	B	C	D
1	Customer Number	Segmentation-1	Segmentation-2	
2	11111	No	Yes	
3	22222	No	Yes	
4	33333	Yes	Yes	
5	44444	Yes	No	
6				

Segmentations

The segmentation that is marked with “Yes” in the above sheet is assigned to the customer and the one marked with “No” is not. Customers can only view articles within the same segmentation.

To import a file with segmentations, follow these steps:

1. Click the **Import** button, 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

Segmentations ▾

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 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.

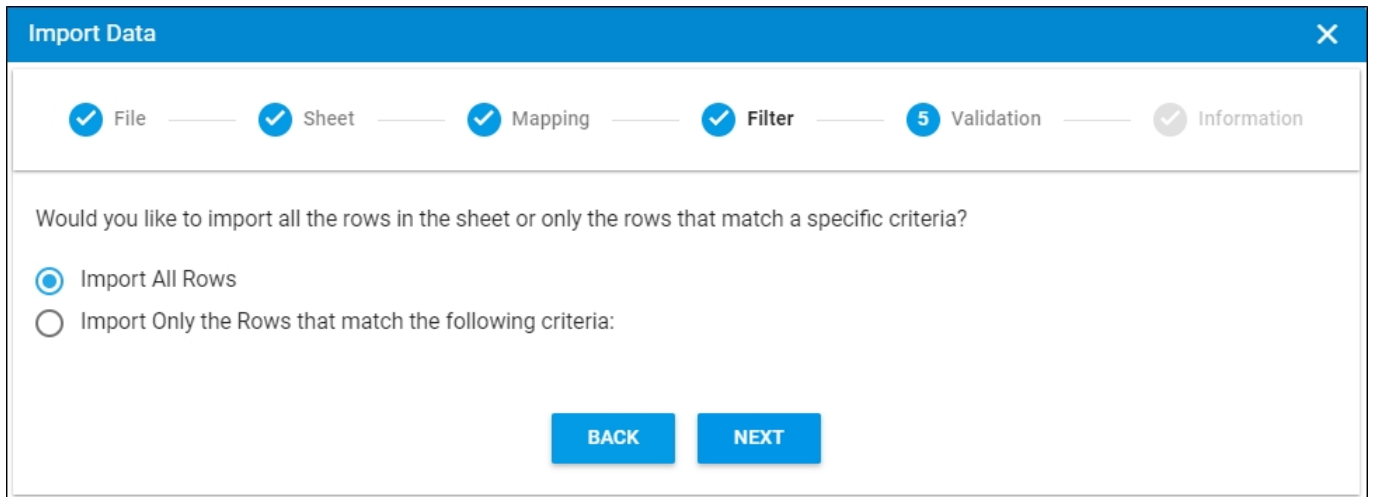
🔍 Search

Customer Number* = Customer Number*

Segmentation-1 = Segmentation-1

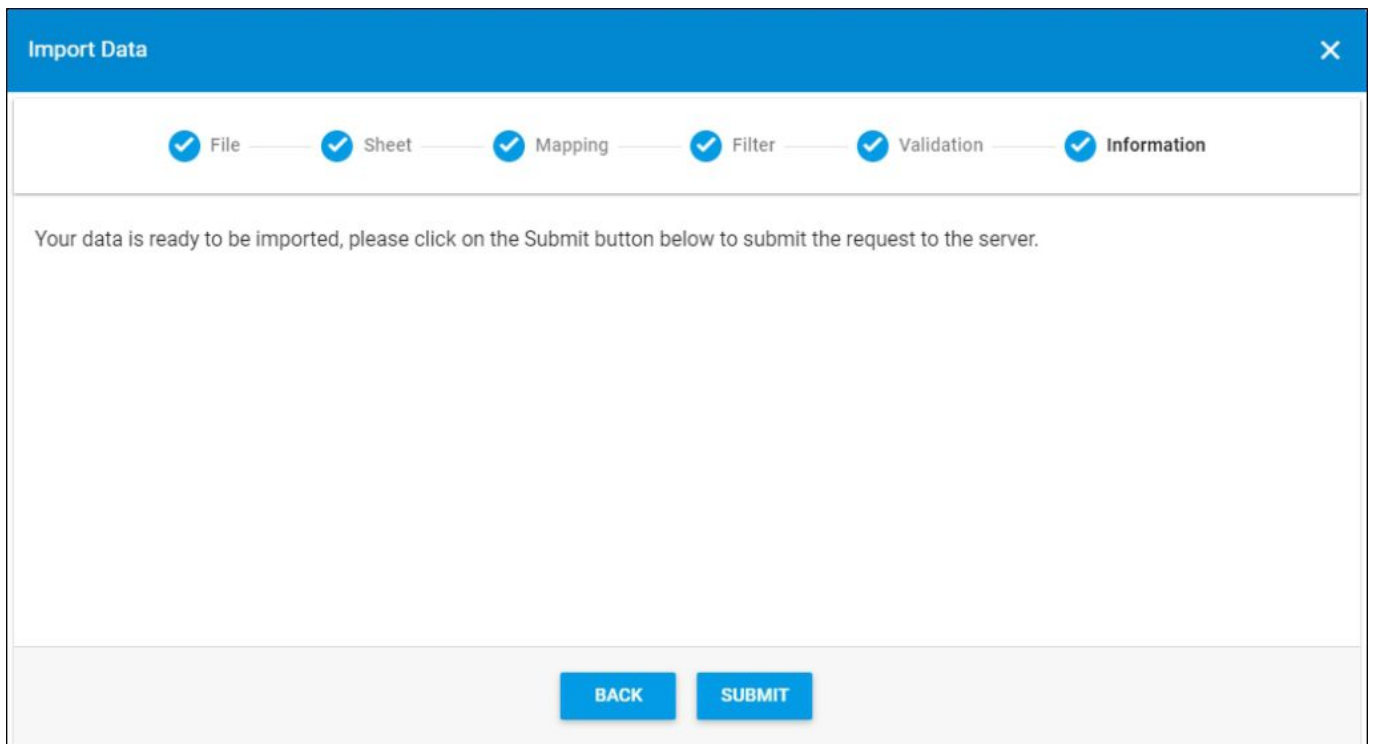
BACK **NEXT**

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:



The screenshot shows a window titled "Import Data" with a close button (X) in the top right corner. Below the title bar is a progress indicator with six steps: File, Sheet, Mapping, Filter, Validation, and Information. Each step has a checkmark icon, and the "Validation" step is highlighted with a blue circle containing the number "5". Below the progress indicator, the text reads: "Would you like to import all the rows in the sheet or only the rows that match a specific criteria?". There are two radio button options: "Import All Rows" (which is selected) and "Import Only the Rows that match the following criteria:". At the bottom of the window are two blue buttons: "BACK" and "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:



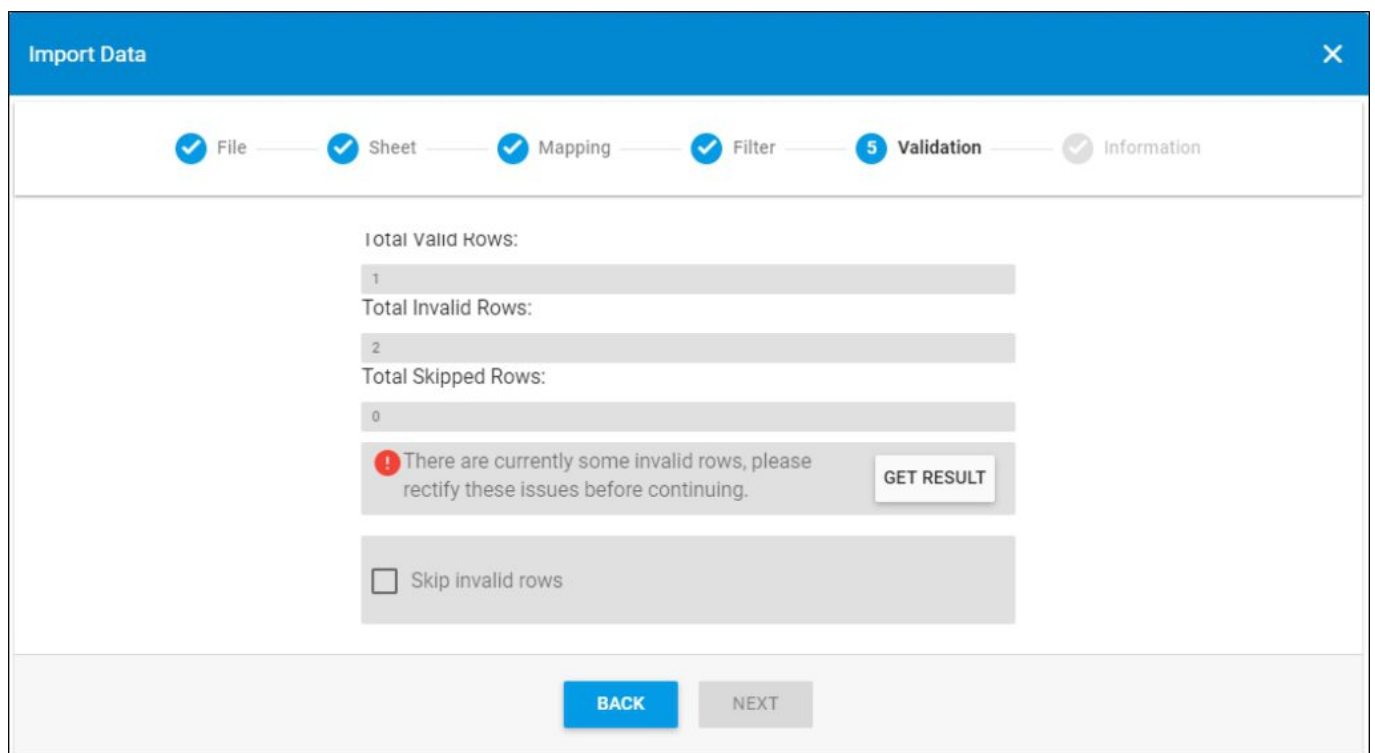
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The validation window shows the status of the import process, the total number of valid rows, and the total number of invalid and skipped rows. The above example shows that all the rows are valid.

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 window titled "Import Data" with a close button (X) in the top right corner. Below the title bar is a progress indicator with six steps: "File", "Sheet", "Mapping", "Filter", "5 Validation", and "Information". Each step has a checkmark icon, and the "Validation" step is highlighted with a blue circle containing the number 5. Below the progress bar, there are three input fields for row counts: "Total Valid Rows:" with the value "1", "Total Invalid Rows:" with the value "2", and "Total Skipped Rows:" with the value "0". Below these fields is a warning message: "There are currently some invalid rows, please rectify these issues before continuing." with a red exclamation mark icon and a "GET RESULT" button. At the bottom of the main content area is a checkbox labeled "Skip invalid rows". At the very bottom of the window are two buttons: "BACK" (highlighted in blue) and "NEXT" (disabled).

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