

Web Link Help File: Bulk Upload Customer Accounts

Abstract

- This help file will illustrate how to bulk upload customer accounts to the website.

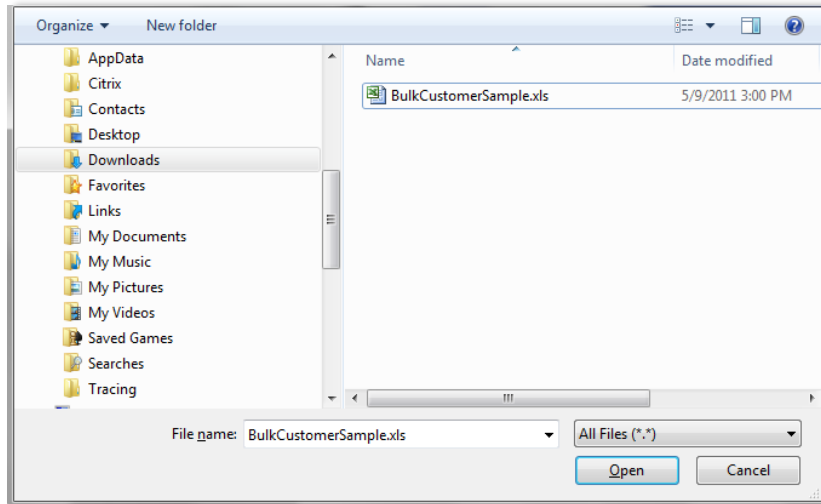
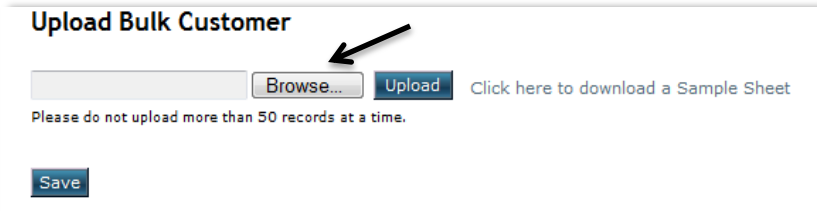
Procedure

1. Navigate to "Customer Management" and then select "Mass Upload Customer Accounts" from the drop down menu. On the Upload Bulk Customer screen click on the "click here to download a Sample Sheet" link; this will download an Excel template file that will allow the administrator to enter all information such as customer number, gateway id and address.



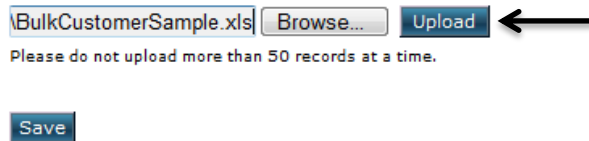
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Customer Number	Gateway ID	Company Name	Default Salesman	Primary Location	MCLGroupName	Address1	Address2	City	Country	State	Zip	Phone	Fax
XX0001	DC01	Company1	All Salesman		1 MCL Group1	Add1	Add2	Tempa	USA	CA	90805	2525255000	7312525256
XX0002	DC01	Company2	All Salesman		1 MCL Group2	Add1	Add2	Tempa	USA	CA	90805	1234567890	7319085101

- Once the Excel template form is completed, it must be uploaded. On the Upload Bulk Customer page click on the "Browse" button to navigate to the directory where the Excel file is saved.



- After the file is selected, click on the "Upload" button to begin the process of uploading the file to the site

Upload Bulk Customer



- After the upload completes, the page will display a table displaying all of the customer account records contained in the Excel file. Click on the "Save" button below this table to permanently save these records to the site.

