

Import customers

You can import a list to create collections and assign customers at the same time. You can specify the collection name, the path which specifies the hierarchy of collection folders, and the customer number to be assigned to each collection. This process saves the time needed to assign customers individually to collections.

The Excel sheet should contain the following columns: Name which is the collection name, Path which specifies the hierarchy of collection folders to which the customer is assigned, Customer Number, all fields are required. Below is an example:

	A	B	C	D	E
1	Name	Path	Customer Number		
2	Shoes	Men/Footwear	11111		
3	Shoes	Men/Footwear	22222		
4	Shoes	Women/Footwear	11111		
5					
6					

Collection Customers

To import a file, follow these steps:

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:

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:

The image shows a software window titled "Import Data" with a blue header bar and a close button (X) in the top right corner. Below the header is a progress bar with six steps: "File", "Sheet", "Mapping", "Filter", "Validation", and "Information". The "Mapping" step is the current active step, indicated by a blue circle with the number "3". The other steps are marked with checkmarks. Below the progress bar, the text "Please select the sheet that contains the data you wish to import" is displayed. Underneath this text is a dropdown menu with the text "Collection Customers" and a downward arrow. At the bottom of the window, there are two blue buttons: "BACK" and "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
 ☒ 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.

Name*	=	Name	[X]
Path*	=	Path	[X]
Customer Number*	=	Customer Number	[X]

[BACK] [NEXT]

7. Select the column of the sheet that matches each 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:

Import Data [X]

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

The sheet will be processed to identify if all the rows are valid to be imported

Status:
Finished

Total Valid Rows:
3

Total Invalid Rows:
0

Total Skipped Rows:
0

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

BACK **NEXT**

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 message appears:

Import Data [X]

✓ 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**

12. Click **Submit**, collections are created and customers are assigned to them.

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.