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								

◄ ► ... **Linked Customers** ⊕

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

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:

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:

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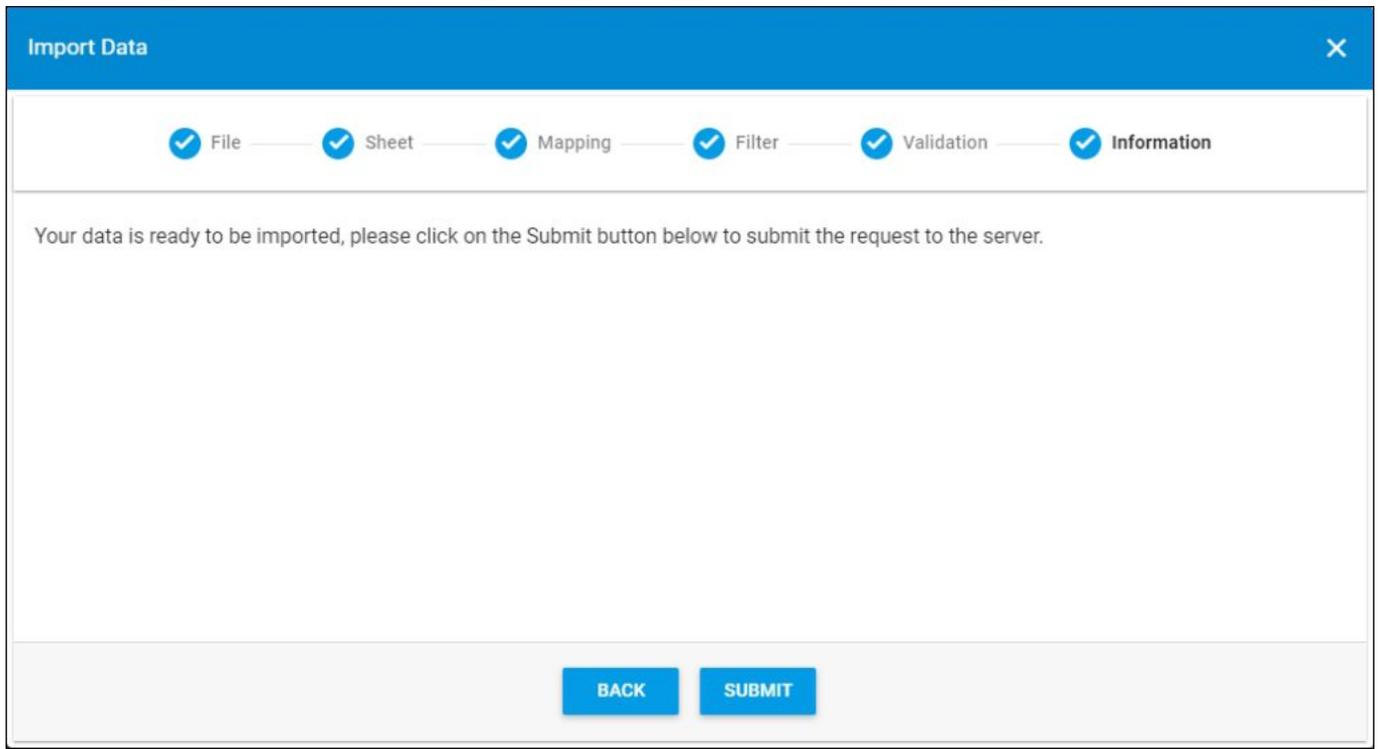8. Click **Next**, the following window appears:

Import Data	✕

✓ 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:

2

Total Invalid Rows:

0

Total Skipped Rows:

2

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

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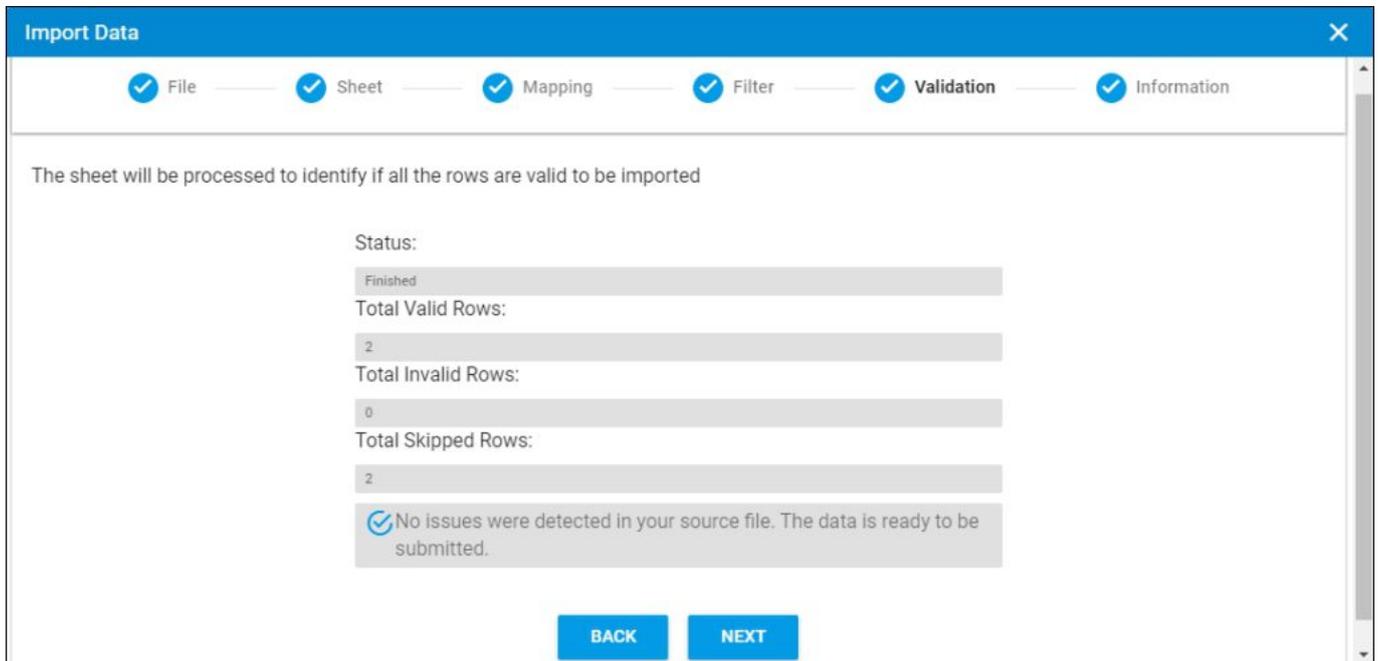
The validation step lists the status of the import process, the total number of valid rows, and the total number of invalid and skipped rows. If there is an error in the sheet you are trying to import such as an empty account manager or an invalid price group the validation window will return an error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

BACK   SUBMIT

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