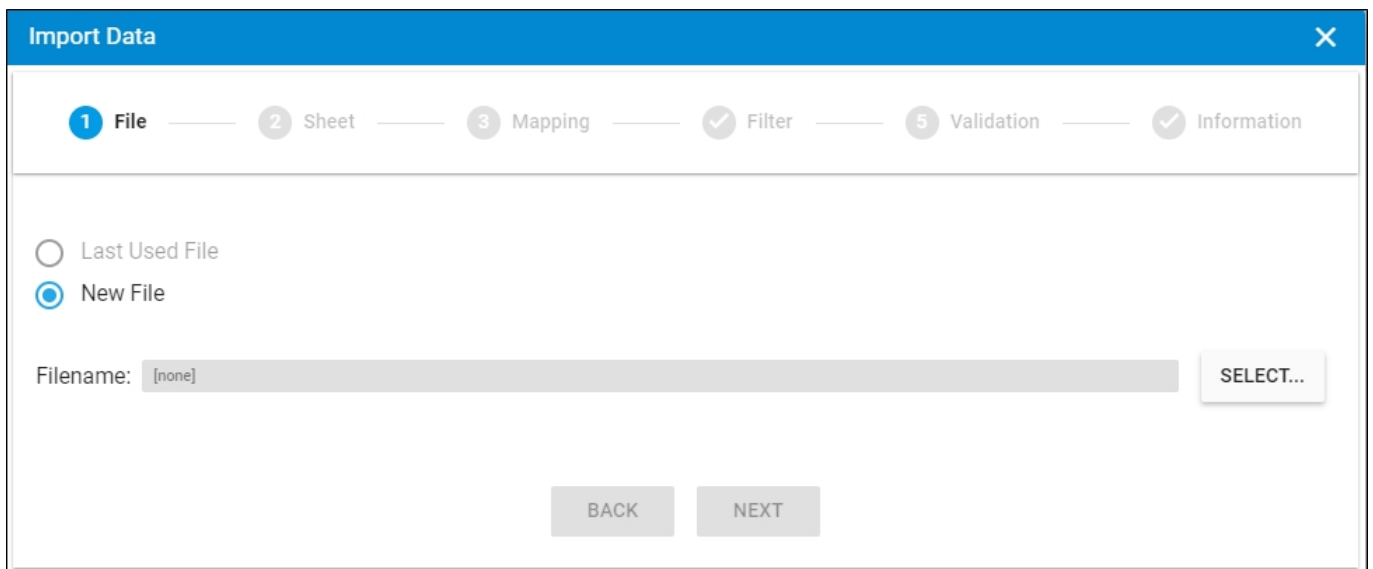


# Import customers locations

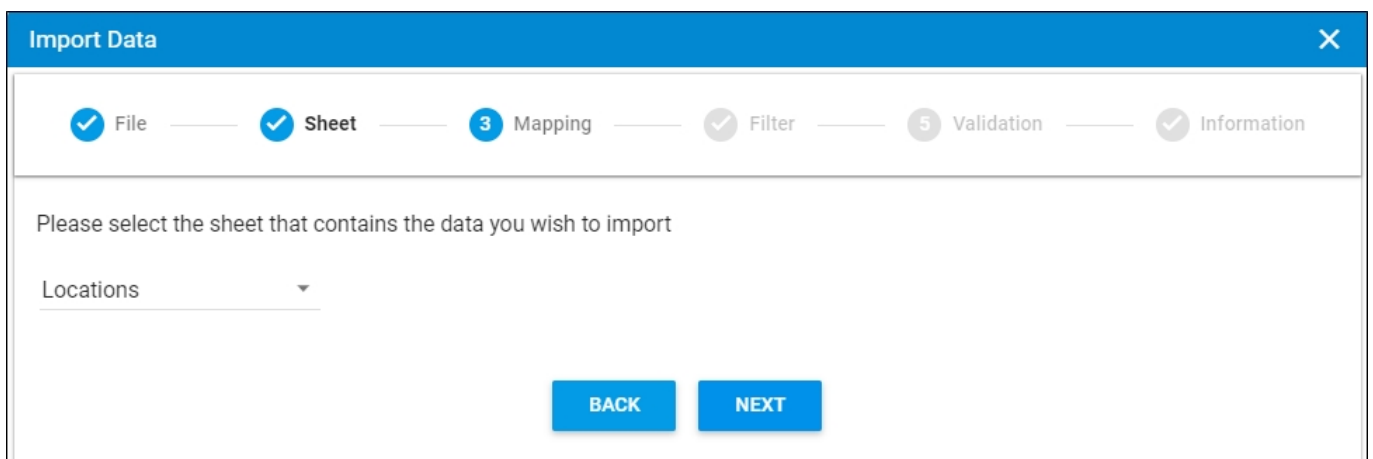
To import a file with multiple customers locations, follow these steps:

1. Click the **Import** button, the following window appears:



The screenshot shows the 'Import Data' window with a blue header and a close button (X) in the top right. A progress bar at the top contains six steps: 1 File (active), 2 Sheet, 3 Mapping, 4 Filter (checked), 5 Validation, and 6 Information (checked). Below the progress bar, there are two radio button options: 'Last Used File' (unselected) and 'New File' (selected). Underneath is a text input field labeled 'Filename:' containing '[none]' and a 'SELECT...' button to its right. At the bottom center, there are two buttons: 'BACK' and 'NEXT'.

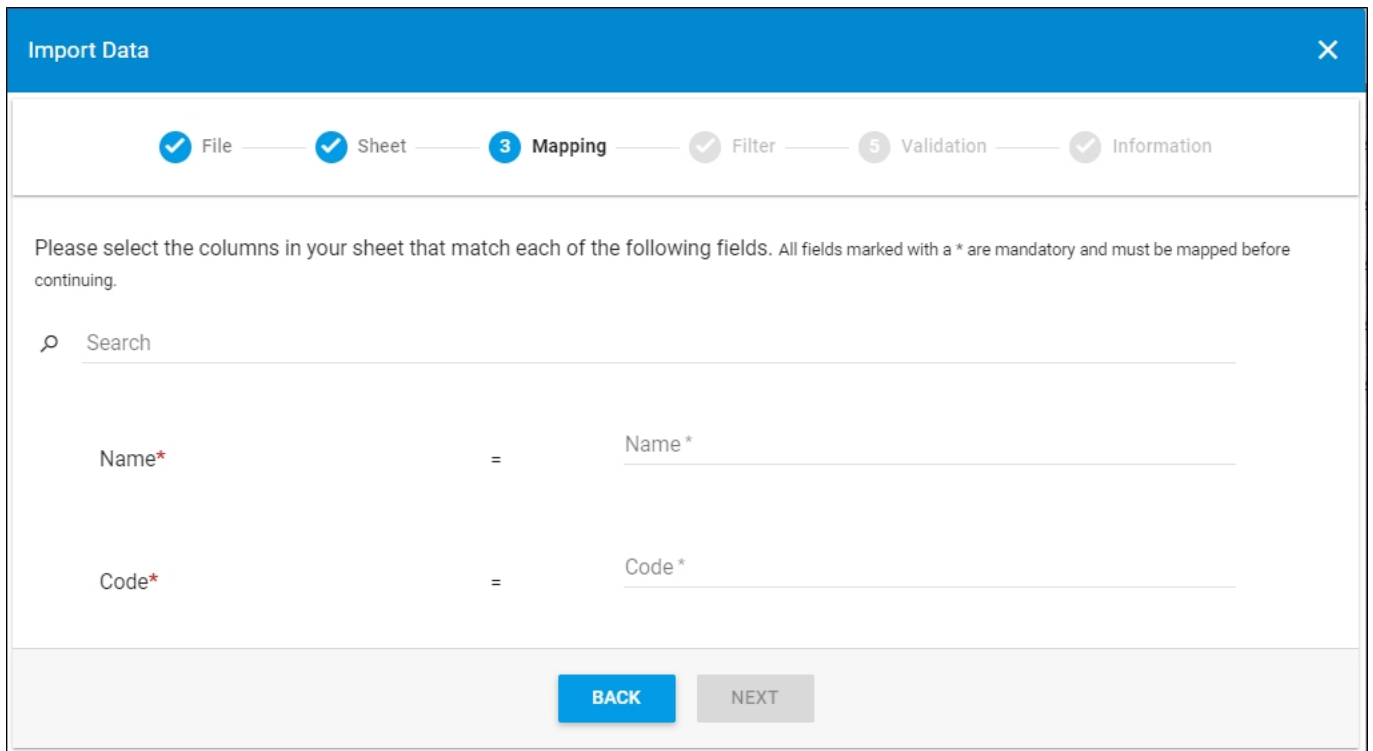
2. Click **Select** to browse for the file you want to import,
3. Select the file then click **Open**, the name of the file you selected appears in its field,
4. Click **Next**, the following window appears:



The screenshot shows the 'Import Data' window with a blue header and a close button (X) in the top right. The progress bar now shows: 1 File (checked), 2 Sheet (checked), 3 Mapping (active), 4 Filter (checked), 5 Validation, and 6 Information (checked). Below the progress bar, the text reads 'Please select the sheet that contains the data you wish to import'. Underneath is a dropdown menu labeled 'Locations' with a downward arrow. At the bottom center, there are two 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

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.

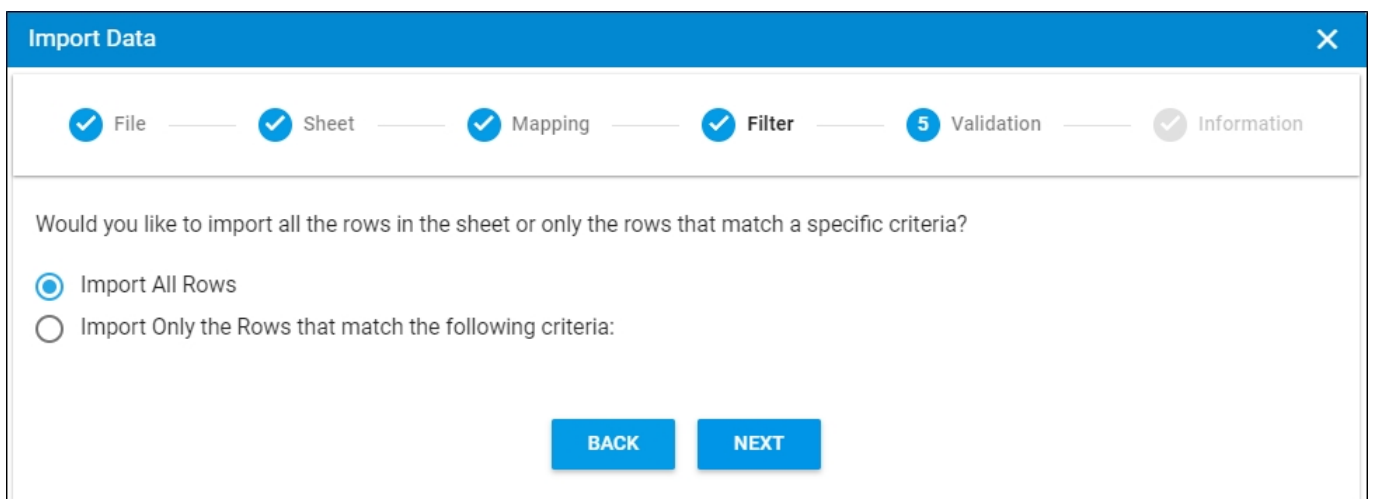
Search

Name\* = Name \*

Code\* = Code \*

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:



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

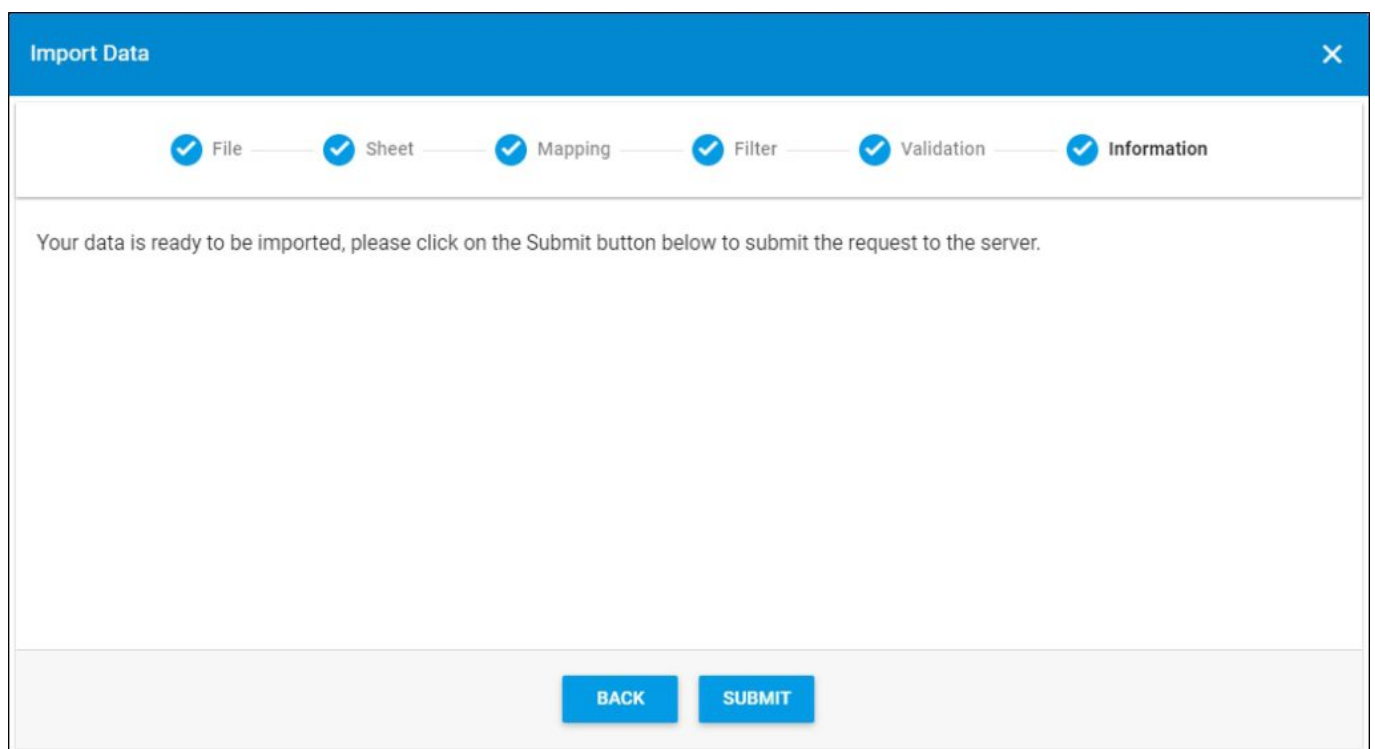
certain criteria, a validation window appears informing you if records are valid or not, if not, you need to fix the sheet then import the file again,

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



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 window appears:



11. Click **Submit**, the progress is displayed,

12. 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:

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.