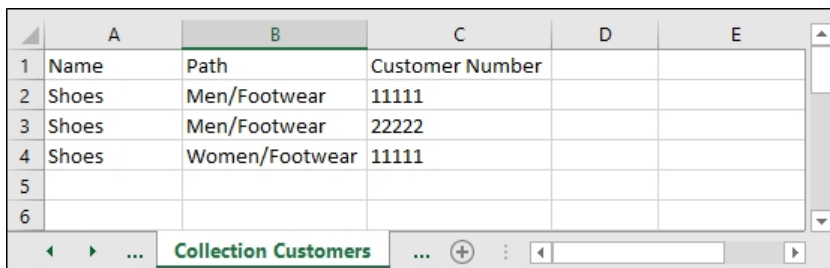


## Import customers

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.

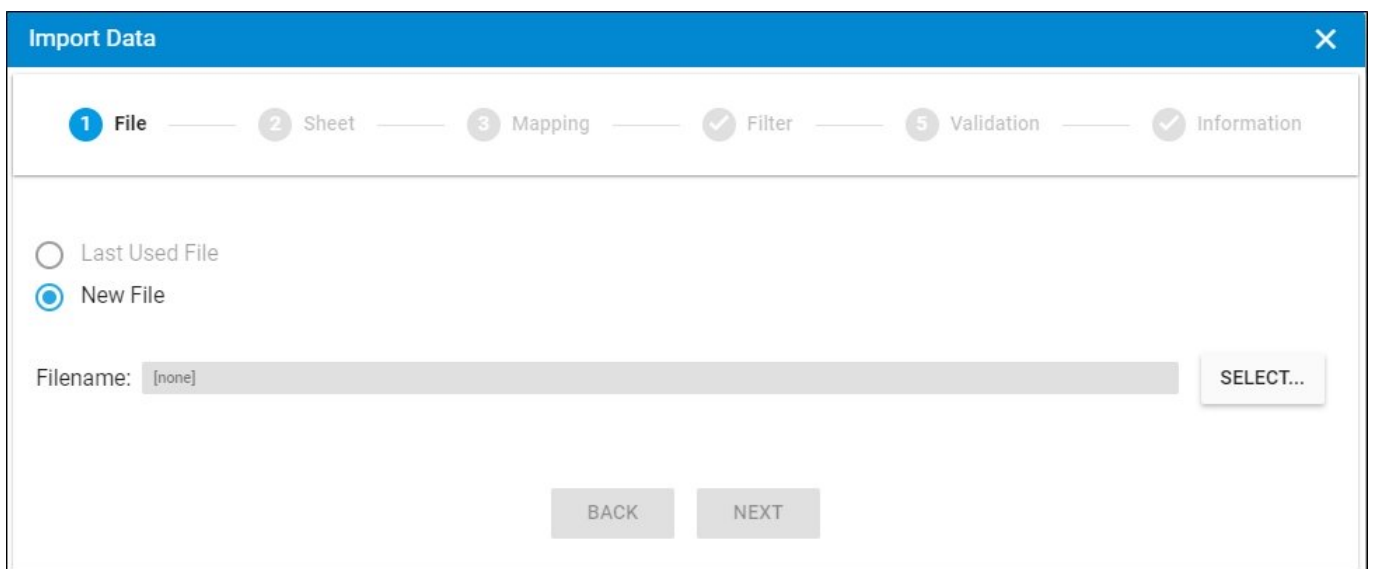
The Excel sheet should contain the following columns: Name which is the collection name, Path which specifies the hierarchy of collection folders to which the customer is assigned, Customer Number, all fields are required. Below is an example:



|   | 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 |       |                |                 |   |   |

To import a file, follow these steps:

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



The 'Import Data' dialog box features a blue header with a close button (X). Below the header is a progress bar with six steps: 1 File, 2 Sheet, 3 Mapping, 4 Filter (checked), 5 Validation, and 6 Information (checked). The main area contains two radio button options: 'Last Used File' and 'New File' (selected). Below these is a 'Filename:' field with the placeholder text '[none]' and a 'SELECT...' button. At the bottom are 'BACK' and 'NEXT' buttons.

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 a window titled "Import Data" with a blue header 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 "Sheet" step is currently active, indicated by a blue circle with a checkmark. The "Mapping" step is highlighted with a blue circle containing the number "3". The "Validation" step is highlighted with a grey circle containing the number "5". Below the progress bar, the text "Please select the sheet that contains the data you wish to import" is displayed. A dropdown menu is open, showing "Collection Customers" with a downward arrow. At the bottom of the window, there are two blue buttons labeled "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 |

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

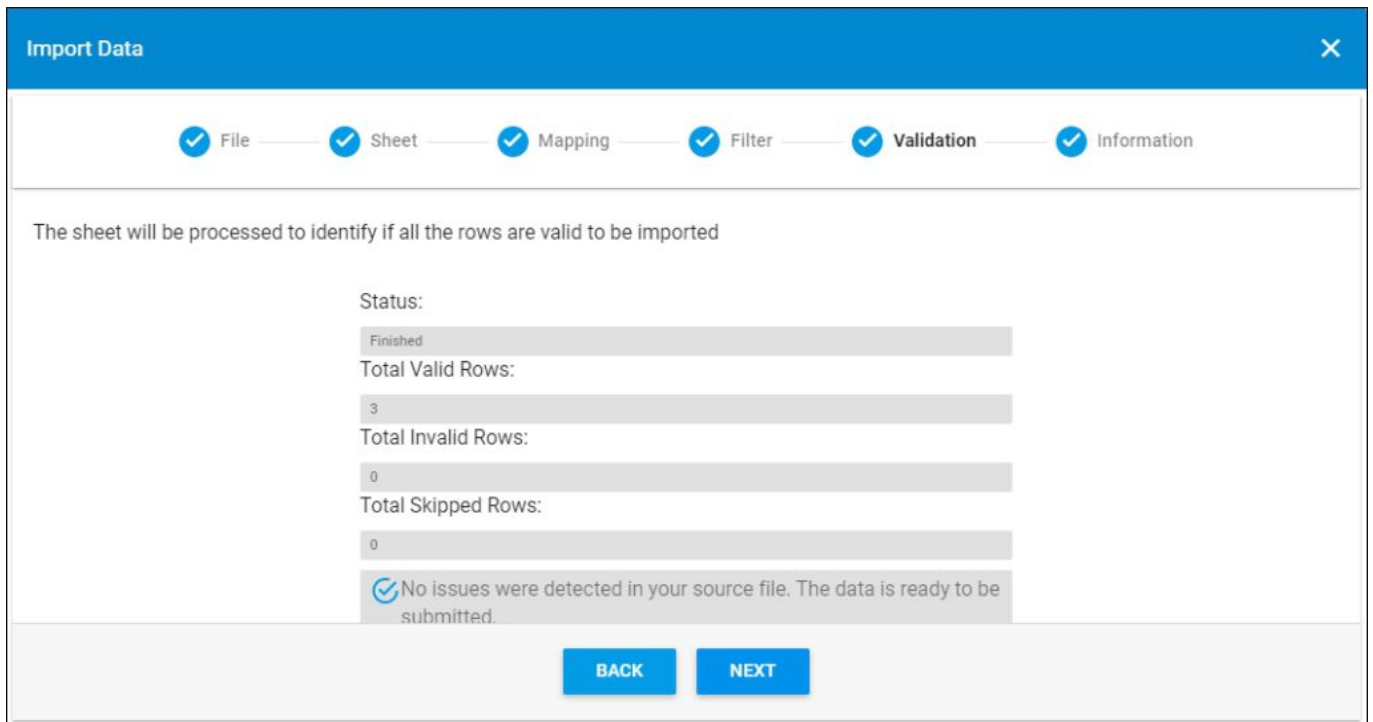
Would you like to import all the rows in the sheet or only the rows that match a specific criteria?

Import All Rows  
 Import Only the Rows that match the following criteria:

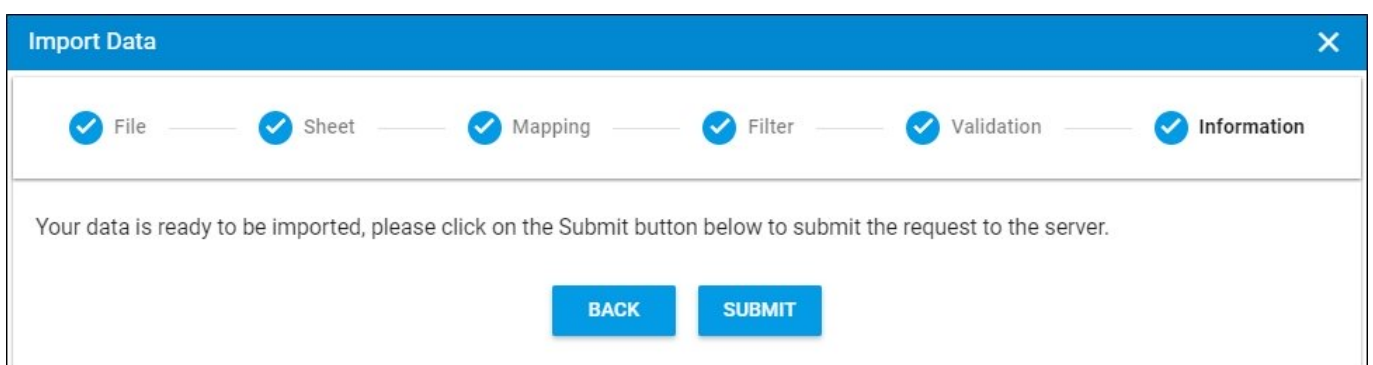
8. Click the radio button next to the import method, either all rows or rows that match certain criteria, a validation window appears informing you if records are valid or not, if not, you need to fix the sheet then import the file again,

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 message appears:



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.