Edit Tiles

Customer CSV Import

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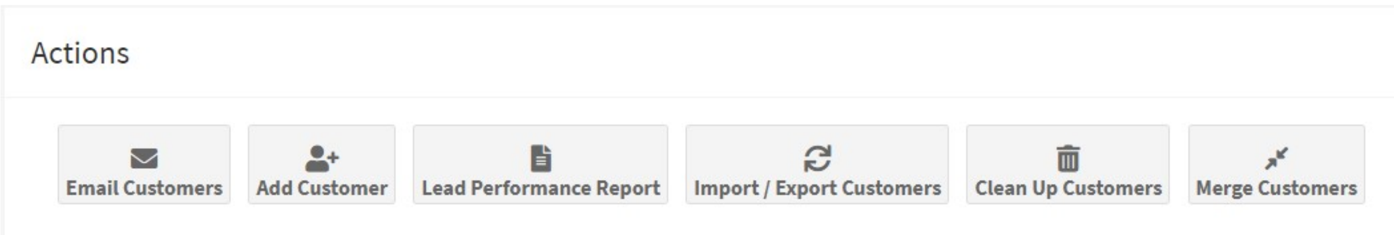
Customer CSV Import

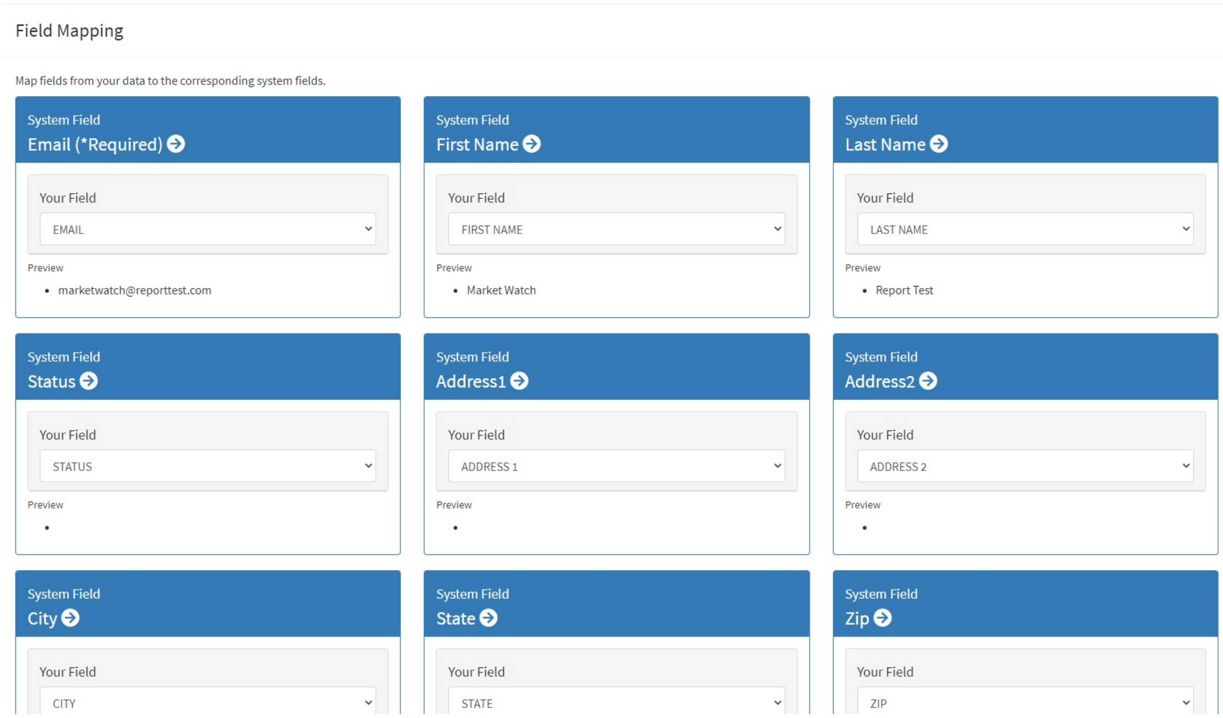
- In the DeltaNET, you will be able to import a CSV of new customers, so that each customer is added to your CRM in one batch. To start with this process, you'll go to your CRM > Customer Center page and find the "Import/Export Customers" button



- From here, you will see a 2 sections:

- File Selection: This will be where you will add the file from your computer to the system to import. First you will need to add the file itself, then you will select the File type (if you received this file froma specific source, if not, use "Other CSV File")
- Uploaded Customer Imports: This will show you all the previous imports you've made into your account, showing Name, Uploade Date, Number of Customers, and the Status of the import.
    - You'll also have an "Actions" button that will let you modify or complete any Not Ready imports. If the import is showing as Ready, this spot will update to a "Delete" button.

- Once the correct file has been added, you will click the "Upload File" button. For the specific CSV files, this will take you directly to page to select if the customer will all be added to a group, and allow you to Save the import. When Saving, you can either process the import right then (adding them to your customer database) or select to process the import later. If you had selected the "Other CSV File" file type, you will be take to a Field Mapping Page:



- When mapping the fields, you will need to make sure that the System's fields (Email, First Name, Last Name, Status, etc) match to the columns set up in the CSV. In the "Your Field" section of each field, you can select the correct column in the dropdown menu.

- At the bottomof this page, you will then see 3 more options for the import:

- Select a Group: This will let you either add the new contacts into a group, or create a new group for them to be added to. Leaving this on "No Group" will leave the new contacts out of any groups.
- Automaticall Create Market Watch Report: If any of the customers being added have Addresses attached to their information, this option will let you create automatic Market Watch Reports for those customers, based on 3 options
  - City, State, Zip Code
  - City, State
  - State, Zip Code
    - Based on whichever option is chosen here, the customer will need to have all items in their import history for the report to be created
- Import Duplicate Contacts: Currently, if an import contains an email address already attached to a customer profile, it will skip over this customer import to prevent duplicate customers. With this settings, you can say that the duplicates should be created to be merged with the original profile later. This would only be needed if the new import customer had information/data that the original does not.

- When all of the above is set and ready to go, you can click the "Save and Process Now" button, which will tell the system to begin creating the new profiles for your customers.