Import customers using an Excel file

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Context

The Excel import prepares customer records in bulk.

Starting point

My customers → Import customers

Prerequisites

- Prepare reference, name, quotation and history; separate product references with commas in the last two columns.

Steps

1. Prepare the file

Prepare the reference, name, quotation and history columns. In the last two, separate product references with commas.

2. Import and confirm

Click Import customers, select the Excel file, then confirm. New customers are added; existing records are updated.

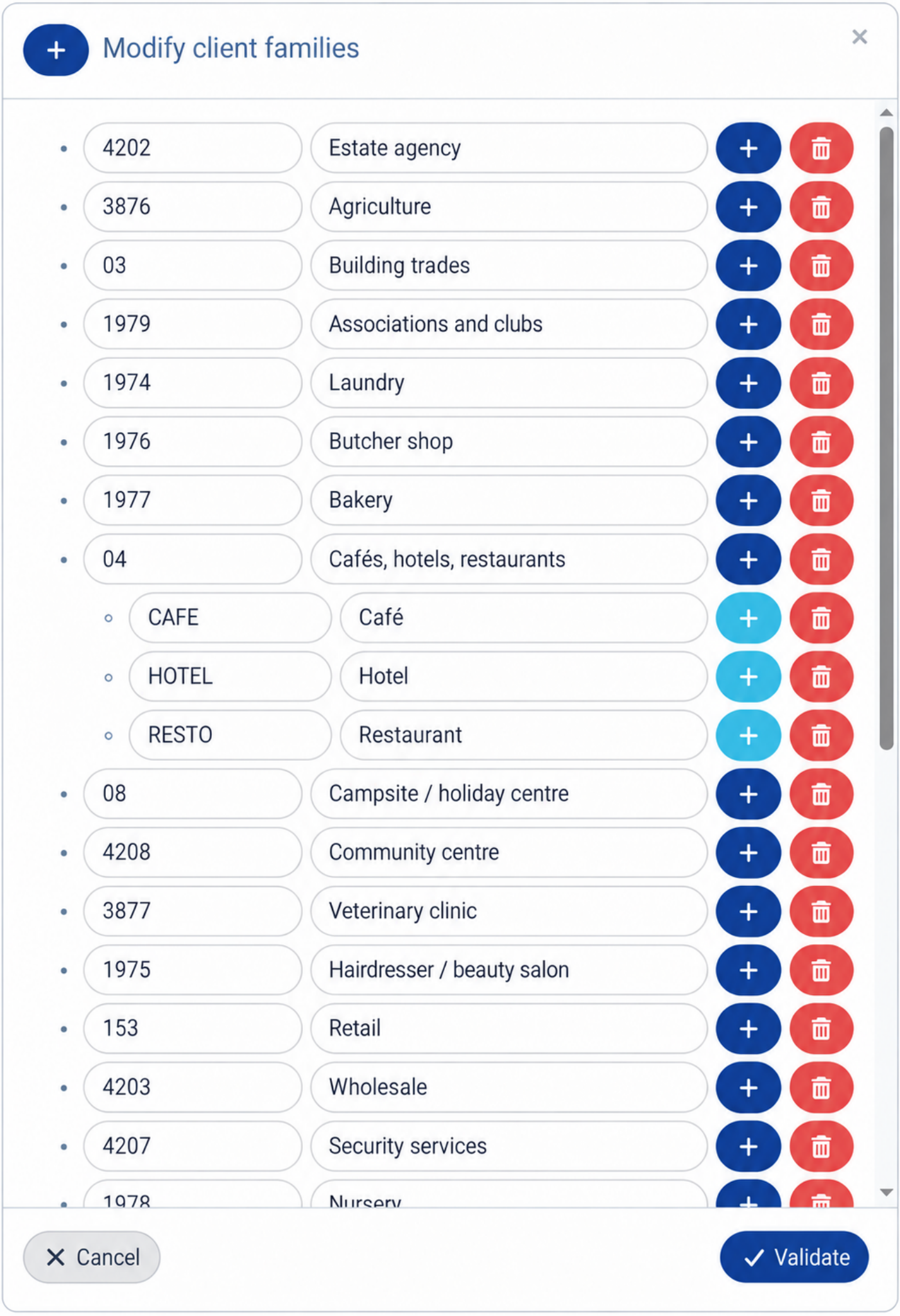
Expected result

New customers are added and existing customers are updated.

Remember

- In the customer record, product references are separated by line breaks; in the Excel file, by commas. For another format, contact support.

Illustrations


Modify client families
4202
Estate agency
3876
Agriculture
03
Building trades
1979
Associations and clubs
1974
Laundry
1976
Butcher shop
1977
Bakery
04
Cafés, hotels, restaurants
CAFE
Café
HOTEL
Hotel
RESTO
Restaurant
08
Campsite / holiday centre
4208
Community centre
3877
Veterinary clinic
1975
Hairdresser / beauty salon
153
Retail
4203
Wholesale
4207
Security services
1978
Nursery
Cancel
Validate

See also

- Create and complete a customer record

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