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# Customer Importer

## Overview

The Customer Importer is a routine that runs from the custom menu pad to import customers from an ASCII comma delimited file into ARCUSTxx Pro Series file. The point and click field mapping wizard allows you to import files with various field layouts. The option grid allows you to choose Customer defaults for fields not contained in your import file.

## Installation

**Extract the CUSTIMPORT...ZIP** into the root of Pro Series.

### Add a Custom Menu Option for AR Invoice Importer

1. Go into System Manager.
2. Maintain – Setup - System Installation.
3. Click on the Custom button.
4. Click on Edit and add a custom menu option with Menu Text of Cust Importer and a command line of DO IMPORTCU. (If you only want specific users to have this available, add the menu option to each user in User Maintenance.)
5. Save the changes, exit Pro Series and then run Pro Series again.

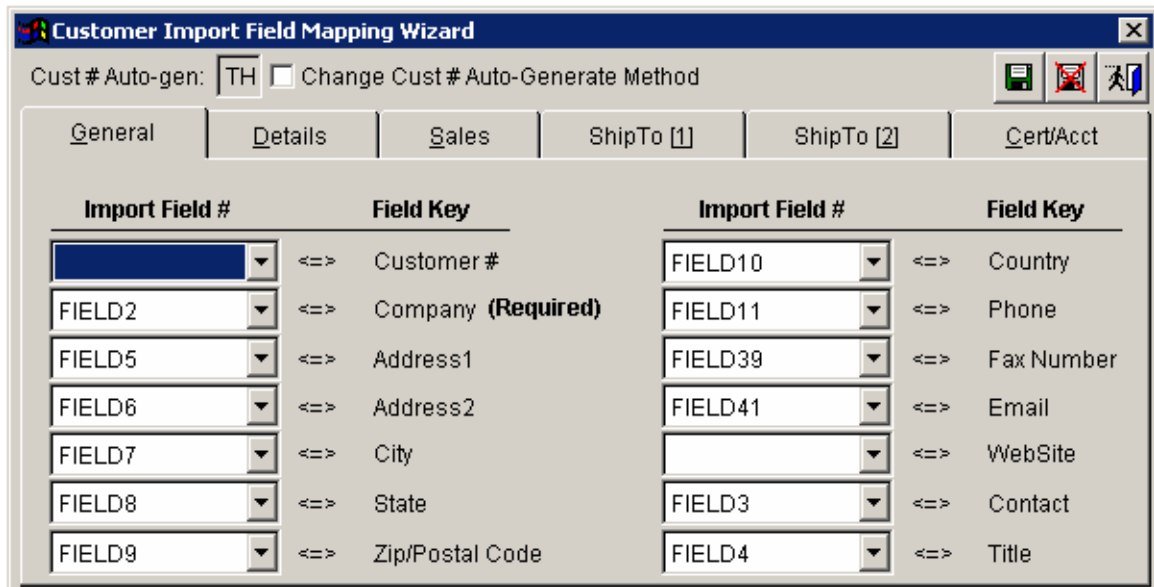
# Customer Importer

## Using the Customer Importer

Choose the Customer Importer from the Custom Menu Option. You must be in the Accounts Receivable Module to run this routine.

### Mapping Wizard

First you will be prompted with the following screen where you will map the fields in your text file to the associated Pro Series Customer fields. The fields you do not have in your text file will be defaulted from the customer, item, option grid, or system defaults. Notice that there are different tabs to help organize the information coming from your import file.



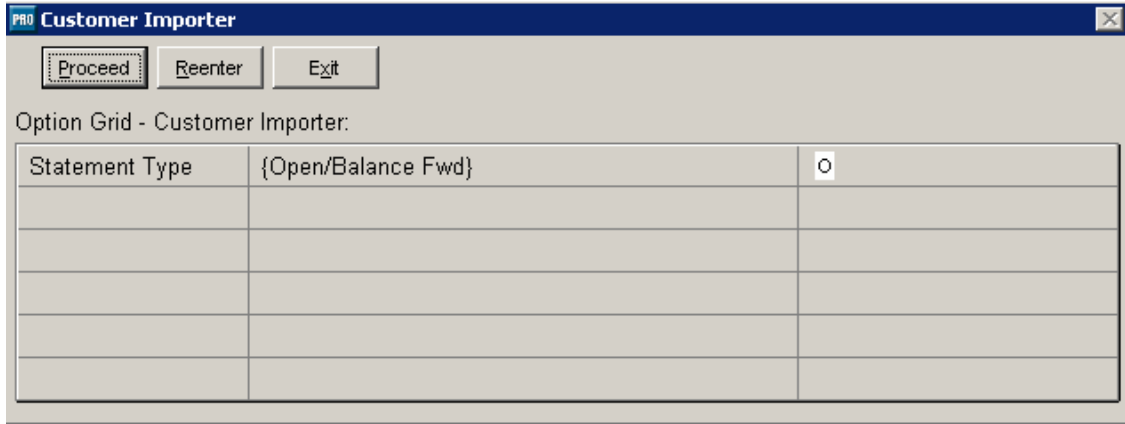
Import Field #	Field Key	Import Field #	Field Key
	<=> Customer #	FIELD10	<=> Country
FIELD2	<=> Company <b>(Required)</b>	FIELD11	<=> Phone
FIELD5	<=> Address1	FIELD39	<=> Fax Number
FIELD6	<=> Address2	FIELD41	<=> Email
FIELD7	<=> City		<=> WebSite
FIELD8	<=> State	FIELD3	<=> Contact
FIELD9	<=> Zip/Postal Code	FIELD4	<=> Title

The first time running the Customer Importer, the field mappings will all be blank. After clicking on Save, the field mappings will be saved for the next time the Importer is run. If it is desired to clear all the field mappings, click on the Cancel button.

# Customer Importer

## Option Grid

Next you will fill in the option grid for default information. These are the defaults that will be used if you do not have the fields in your import file or some of the fields you mapped are empty for some of the customers. If any of the option grid options are blank, the Pro Series defaults will be used.



## Errors During the Import

A preprocessing is done on the import file before any Customers are created. You will be presented with an error log listing the errors that need to be corrected before attempting the import again. The scenarios that will generate errors and abort the import process are as follows:

- Duplicate Customer Number
- Empty company name



# Customer Importer

## Technical Information

IMPORTCU.DBF	Table to hold field positions of last import
IMPORTCU.FRX/FRT	Custom report for import error log
IMPORTCU.PRG/FXP	Customer Importer Main Program
IMPORTCU.SCX/SCT	Customer Importer Main screen

Have a question or a problem? Please have Reseller contact Data Developers Plus, Corp. at [techsupport@ddpcorp.com](mailto:techsupport@ddpcorp.com) or 1-877-238-0436.