

# Customer Import Wizard

## Overview

The **Customer Import Wizard** can be used to import customers into the Edge. It supports importing new customers or importing changes to existing customers. Supported file formats include CSV, JSON, and XML.



**NOTE:** If you are importing changes to existing customers the import file must include the Edge customer number. Any records missing an Edge customer number will be imported as new customers.



**NOTE:** The importer does not support deleting or merging customers. This type of cleanup must be done from within the Edge.

## Importing

To import customers using the wizard:

1. Click **Customer > Wizards > Customer Import**.

The screenshot shows the 'Customer Import Wizard' dialog box. At the top, there is a blue header with the title 'Customer Import Wizard' and a document icon. Below the header, there is a paragraph of instructions: 'Use this wizard to import customer data. Enter a value for Input File on this screen to determine what you want imported. Accepted file types are .CSV, .JSON, and .XML files only. On the next screen select your column mappings.' Below this is a red note: 'NOTE: Your database will be backed up before the import process begins.' The 'File Type' is set to 'JSON' in a dropdown menu. The 'Input File' field contains the path 'C:\Users\Dominick\Desktop\CustomerList.json' and has a file explorer icon to its right. At the bottom, there are three input fields for 'Address Type If Blank', 'Email Type If Blank', and 'Phone Type If Blank', all of which have 'IMPORTED' entered. At the very bottom, there are 'Next >' and 'Cancel' buttons.

2. Select the **File Type** you wish to import, then use the **Input File** field to select the file for import.
3. In the Edge, each customer contact method (address, email, phone) has a type. For example, phone contacts might be type 'Cell', 'Home', 'Work', etc. If your import file contains contacts that do not have a type, the values at the bottom of this window will be used (default 'Imported').
4. Click **Next** to proceed.

5. Use this screen to map the data from your import file to the appropriate place in the Edge.

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**Column Mappings**

Source Columns	Edge Columns	First Record
cuKey	Edge Customer #	001-00001
cuAccountKey	Edge Customer Account #	001-01518
cuTitle	Title	
cuFirstName	First Name	Scott
cuMiddleName	Middle Name	
cuLastName	Last Name	Drummond
cuSuffix	Suffix	
cuGender	Gender	M
cuBirthdate	Birthdate	10/5/2000
cuSpouseBirthDate	Spouse's Birthday	2/7/1993
cuWeddingAnniv	Anniversary	7/27/2014

Edge Columns highlighted in red indicate for new records only.

**Source Columns** are the column headers from the file being imported while **Edge Columns** defines where it is being mapped in the Edge. The **First Record** column shows a preview of the first record from the import file so that you can verify the mappings are correct.

6. Complete data mapping then click **Next**.
7. Check whether you want to **Show Updated/Imported Customer List**, then click **Next** to perform the import. A backup of the database is automatically made at this time. Depending on the number of imported files, this could take some time to complete.
8. When completed the wizard will indicate the number of files processed and provide the path to the import log file.

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Number of Customer records processed: 18521

View results in the file: C:\ProgramData\AJ\SLLC\edge\CustomerImport.log

Customer Import complete. Click Finish to close the wizard.