## Import a Customer List

### Create the spreadsheet to import

1. Create a suitable format for copying items from an **existing customer list** (eg export to a .csv file and open in Excel) or print/display your list for manual typing.
2. **Download** the template **spreadsheet ('ImportCustomerList.xlsx' in the on-line documentation)** and look at the worksheet called **Help&Examples** for guidance.
3. Select the worksheet called **Customer List**.
4. Type or paste your **customer names** into **column B** (marked in purple in the example).
5. Type or paste the **location names** into **column J** (marked in purple in the example), ensuring that they correspond with the customer name entered in step 4. If a customer has more than one location, enter them immediately below each other, leaving the customer name blank in column B (refer to examples if required).
6. **Enter other information as required**, ensuring that it is in the correct row for the customer/location to which it is related (refer to examples if required). This is optional and can be amended manually through **Setup/Maintenance->Customers ('Editing a customer' in the on-line documentation)** at a later date.
7. Save to a suitable folder on your computer for uploading to in the next stage - **Importing a customer spreadsheet (on-line documentation)**.

> ⚠ Hovering over a cell in the top row will give additional information about organising customer information - this may seem quite technical and can be returned to at a later date.



## Import into magic5

1. Display the **Customer list** by selecting Customers from the **Setup/Maintenance menu**.
2. Click on the **Import from spreadsheet** button which will open another window.
3. **Leave the defaults selected** for assigning all templates and groups to all customers (unless you wish to customise yourself). These can be amended at a later date.
4. Click on **Add attachment** (opens an Upload Files window).
5. Click the **Select** button (opens a Browse window).
6. **Browse** your computer for the already-prepared Excel **spreadsheet** (see **Creating a customer spreadsheet (on-line documentation)** for details) and click the **Open** button (closes Browse window and returns to Upload Files window).
7. Click the **Save** button to close the Upload Files window.
8. Click the **Save** button to close the Import from spreadsheet window and your customer list will be populated automatically.

## Full customer list

Setup/Maintenance  Reports

Maintain Templates
(1) Customers
Lists
Groups
Users
Job Definitions
System Settings

☐ All dates ▾     All customers ▾     All locations ▾     All report

**Customer**

☐ JEC
☐ Metro City Council
☐ WM Farmer and Son

Add Customer     Import from spreadsheet     Create customer tag

Delete customer     Export
(2)

Son
Import from spreadsheet     Create customer tag
Export

File name: ImportCustomerList.xlsx ▾     All Files (*.*) ▾

Open ▾     Cancel
(6)

**Import from spreadsheet**

Automatically allow all templates for new imported customers  ☑

Automatically allow access to new imported customers for all groups  ☑
(3)

Spreadsheet     Add attachment
(4)

Save
(8)

📋 **Upload Files**

[          ]  Select  ✕ Remove
(5)

Add
Save  Cancel
(7)