

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.

| customercode | customer | add1 | add2 | add3 | add4 | add5 | locationcode | location | add1 | add2 | add3 | add4 | add5 | iccode | icname | icemail | icphone | icmobile | | | | | |
|--------------|--------------------|-------------------|-------------------------------|--------------|-------------------|----------|--------------|--------------------|-------------------|-------------------------------|------------|------------|--------------------|-----------|-------------------|------------------------|-------------|-------------|--------------------|-------------|--------------------|-------------|-------------|
| 14680 | JEC | Unit 1 | Meadowcroft Industrial Estate | Meadowcrof | Birmingham | B12 3QT | 21443 | Birdington | Unit 1 | Meadowcroft Industrial Estate | Meadowcrof | Birmingham | B12 3QT | 7681 | Sandra Peterson | speterson@example.com | 0123 456789 | 0123 456789 | | | | | |
| 14688 | Metis City Council | The Council House | Central Court | Manchester | M12 3ML | 21440 | The Park | 23 Old School Road | Middleton | Manchester | M12 3ML | 21440 | 23 Old School Road | Middleton | Manchester | M12 3ML | 7581 | Kim Jones | kjones@example.com | 0123 456789 | 0123 456789 | | |
| 14659 | VM Farmer and Son | Level 6 | Queen Station | Station Road | Weston-super-Mare | BS12 3WP | 21441 | Belton | Causeway Approach | Preston Mile | Clevedon | BS12 3WP | 21441 | Belton | Causeway Approach | Preston Mile | Clevedon | BS12 3WP | 7578 | Kate Smith | ksmith@example.com | 0123 456789 | 0123 456789 |
| | | | | | | | 21442 | Haverstock | Dockside Shed | Dockside Industrial Estate | Avonmouth | Bristol | BS12 3TT | 7580 | Pat Radcliffe | pradcliffe@example.com | 0123 456789 | 0123 456789 | | | | | |
| | | | | | | | 21442 | Haverstock | Dockside Shed | Dockside Industrial Estate | Avonmouth | Bristol | BS12 3TT | 7579 | Susan Brown | sbrown@example.com | 0123 456789 | 0123 456789 | | | | | |

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.

The screenshot displays a software interface for managing customers. At the top right, a navigation menu is visible with the following items: Maintain Templates, Customers, Lists, Groups, Users, Job Definitions, and System Settings. The main area is titled "Full customer list" and includes several filters: "All dates", "All customers", and "All locations". Below these filters, there are checkboxes for "Customer", "JEC", "Metro City Council", and "WM Farmer and Son". A set of buttons includes "Add Customer", "Import from spreadsheet", "Create customer tag", "Delete customer", and "Export".

An "Upload Files" dialog box is open, showing a file named "ImportCustomerList.xlsx" selected. The dialog has "Open" and "Cancel" buttons. In the background, the "Import from spreadsheet" form is visible, featuring two checked checkboxes for "Automatically allow all templates for new imported customers" and "Automatically allow access to new imported customers for all groups", a "Save" button, and an "Add attachment" link.

Numbered callouts indicate the following steps or elements:

- 1: Points to the "Customers" menu item in the top right navigation menu.
- 2: Points to the "Import from spreadsheet" button in the main interface.
- 3: Points to the first checkbox in the "Import from spreadsheet" form.
- 4: Points to the "Add attachment" link in the "Import from spreadsheet" form.
- 5: Points to the "Select" button in the "Upload Files" dialog.
- 6: Points to the "Open" button in the "Upload Files" dialog.
- 7: Points to the "Save" button in the "Upload Files" dialog.
- 8: Points to the "Save" button in the "Import from spreadsheet" form.