Customer Import Instructions
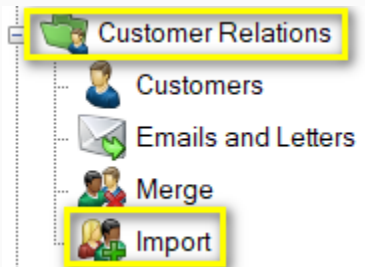
Clients of Agile now have the ability to import customer lists directly into the system.
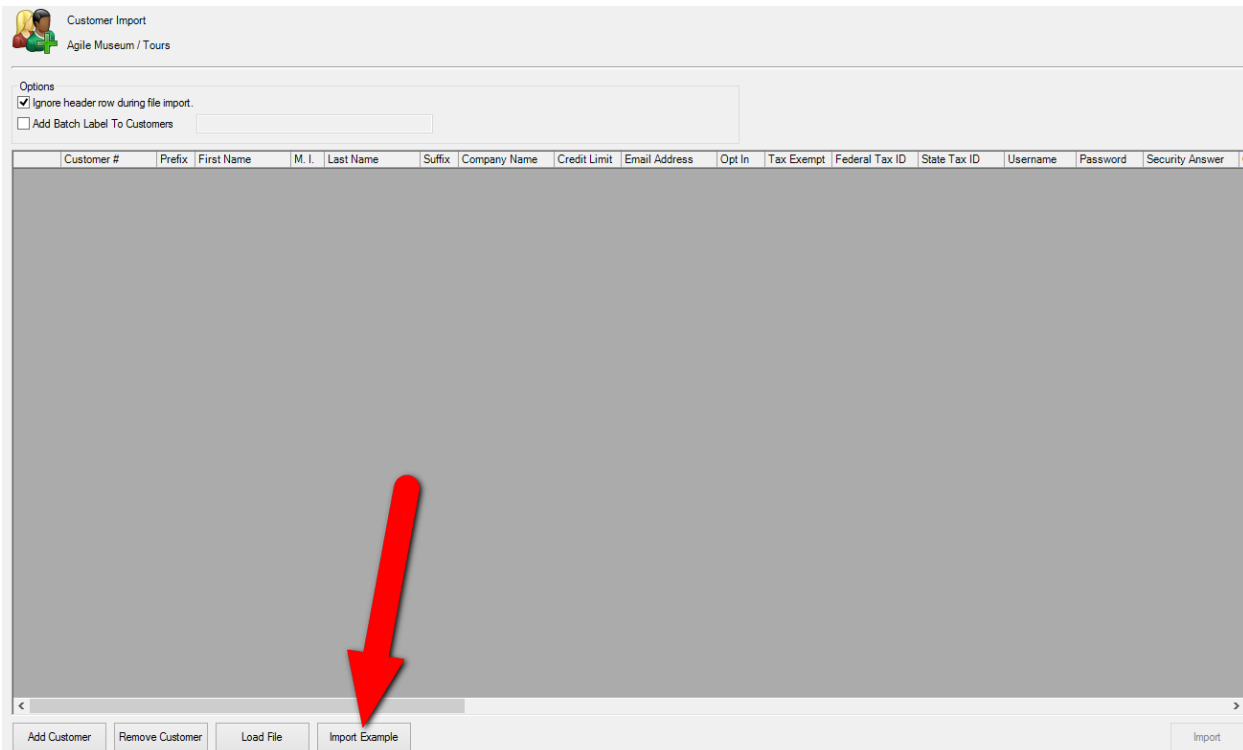
1. Log in to **Administration**.

2. Select the **House** icon .

3. Open the **Customer Relations** folder and select the **Import** button.

4. Select the **Import Example** button at the bottom of the screen.

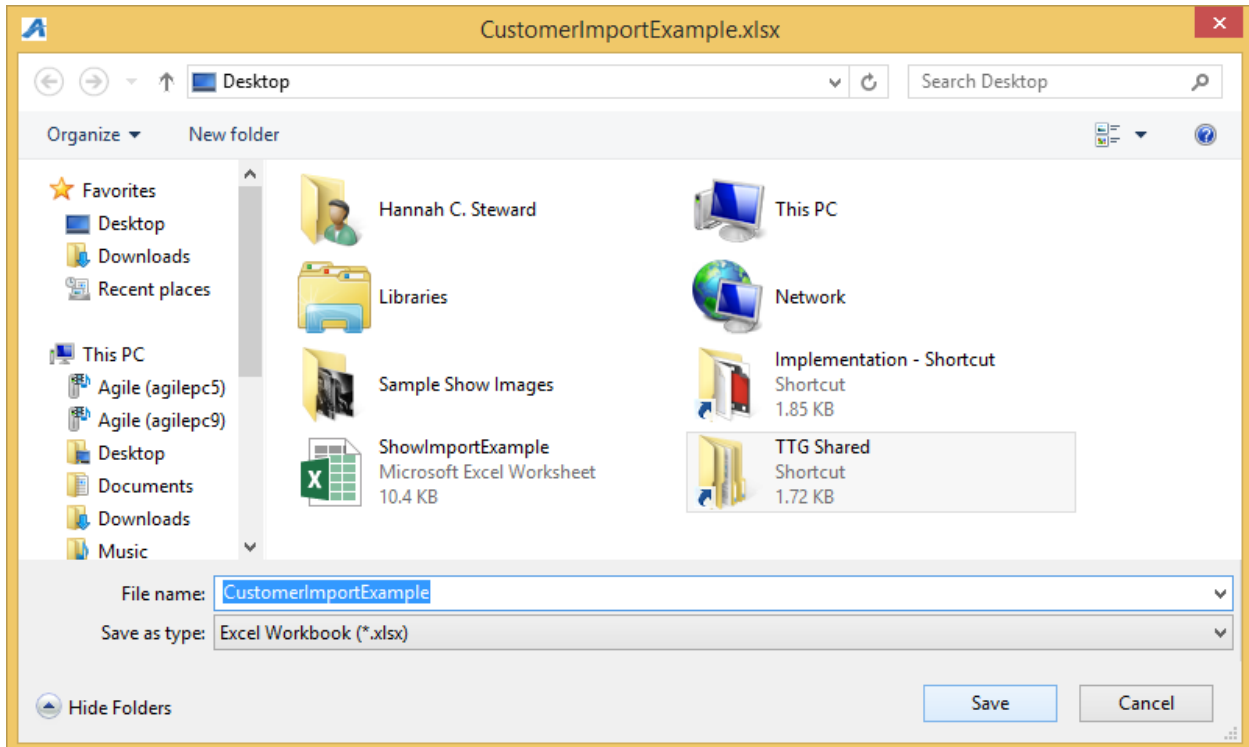5. A pop-up window will appear. **Save** the **Customer Import Example** spreadsheet to your computer.

6. Open the **Customer Import Example** spreadsheet and fill in the information under each column.

Customer Number (optional)	Prefix (optional)	First Name	Middle Initial (optional)	Last Name	Suffix (optional)	Company Name (optional)	Credit Limit (optional)	Email Address (optional)	Opt In (optional)
1234		John	M	Smith			0	johnsmith@agiletix.com	TRUE

Note: Not all of the columns are required. Those that are optional are marked in the header.

Prefix (optional)	First Name	Middle Initial (optional)	Last Name
	John	M	Smith

You must have the information in the **required** fields filled out in order to successfully import your list. Once this is done make sure that you **Save** and **Close** the spreadsheet.

7. Go back into **Administration** and open up the **Customer** folder and click **Customer Import**.

*Note: the **Ignore header row during file import** is checked by default. Keep this checked in order to successfully import your spreadsheet.*

8. If you wish to add a batch label to your **Customer Records** check the box next to **Add Batch Label to Customers** then add the title of the label in the field provided.

9. Click the **Load File** button and choose your completed spreadsheet.

10. All your customer information will appear within the window. It is recommended to scroll through what is shown and check for any errors before proceeding.

Note: If you do see any errors you can make the necessary correction on the Customer Import page. Simply click the field that needs to be changed and type in the changes.

11. Once everything is correct click the **Import** button in the bottom right corner.
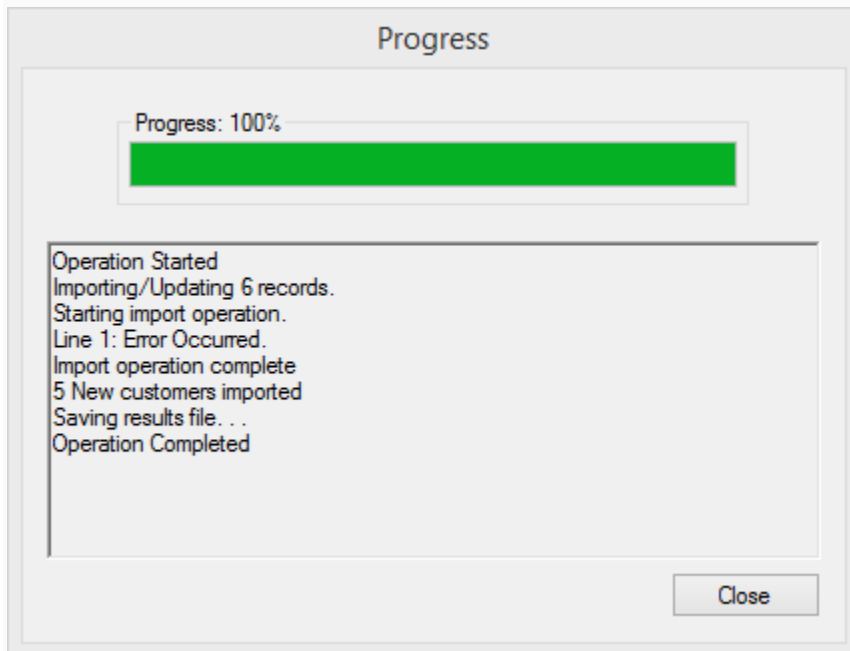
12. The progress pop up will appear.

13. Once you have reached 100% the **Save Import Results** pop up will appear. This will tell you about the results of your import (i.e. if there were any errors or if it was successful). Save this spreadsheet to your computer for future reference.
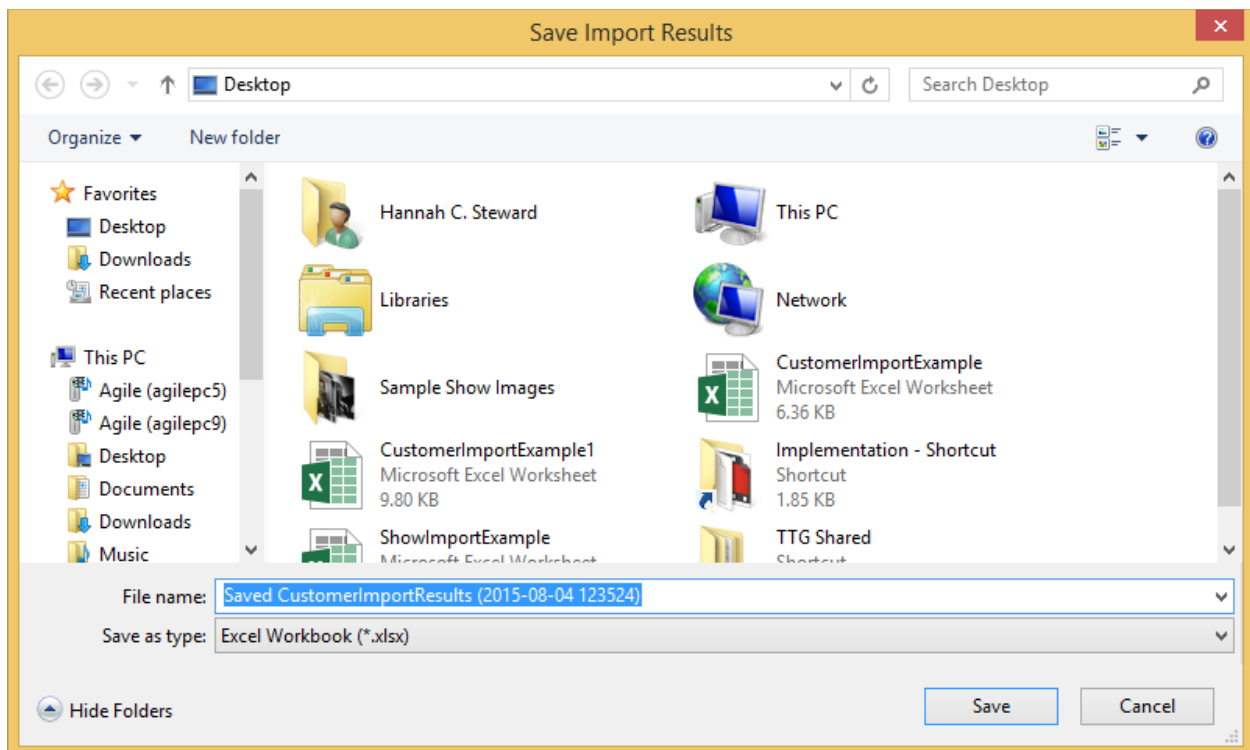
14. Now you will be able to look up the **Customer** records you just imported.

Last Name: Gatsby	City:	Member #:
First Name:	State:	Membership
Phone:	Zip:	Exact Name Match ☑
Email:	Customer #:	Search For Business ☐
Records Per Page: 20	Search	Show Disabled Customer ☐

LastName	First Name	Customer #	Street 1	City	State	Zip
Gatsby	Jay	73965	434 West Egg	New York	NY	10001