

Customer Import Instructions

Clients of Agile now have the ability to import customer lists directly into the system.

1. [Log in](#) to Administration.

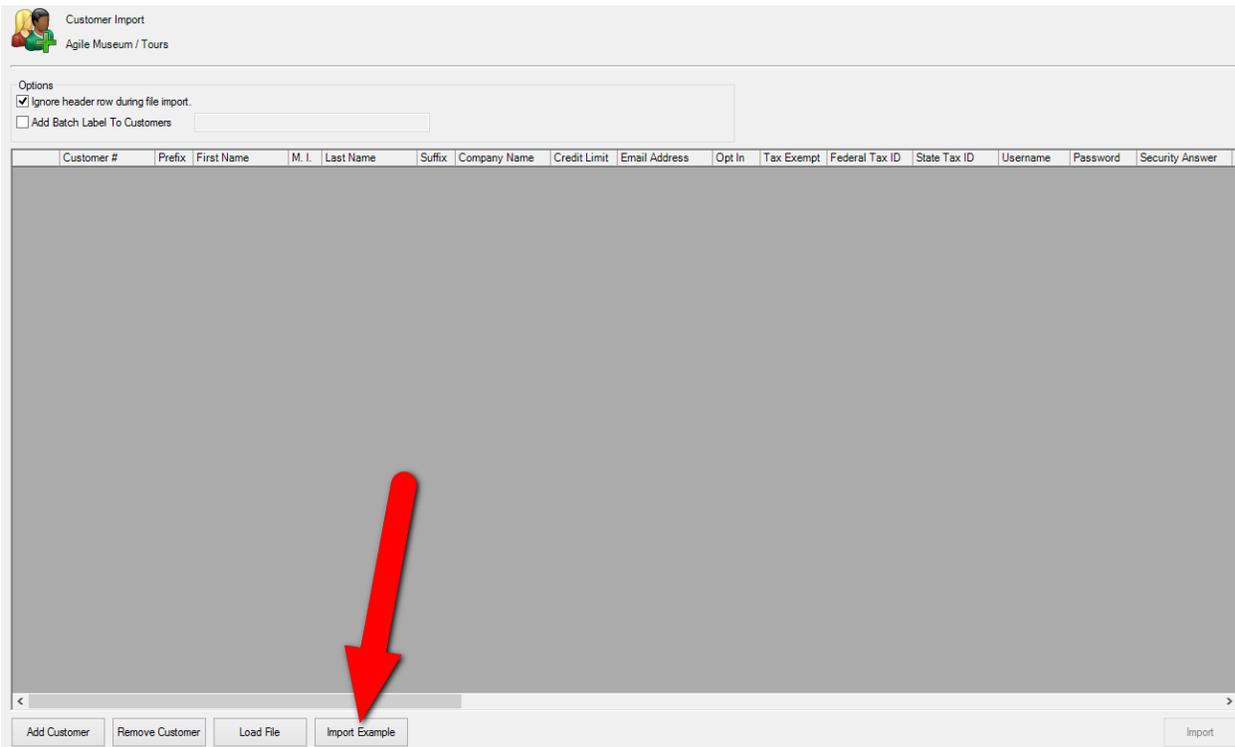


2. Select the **House** icon .

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



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

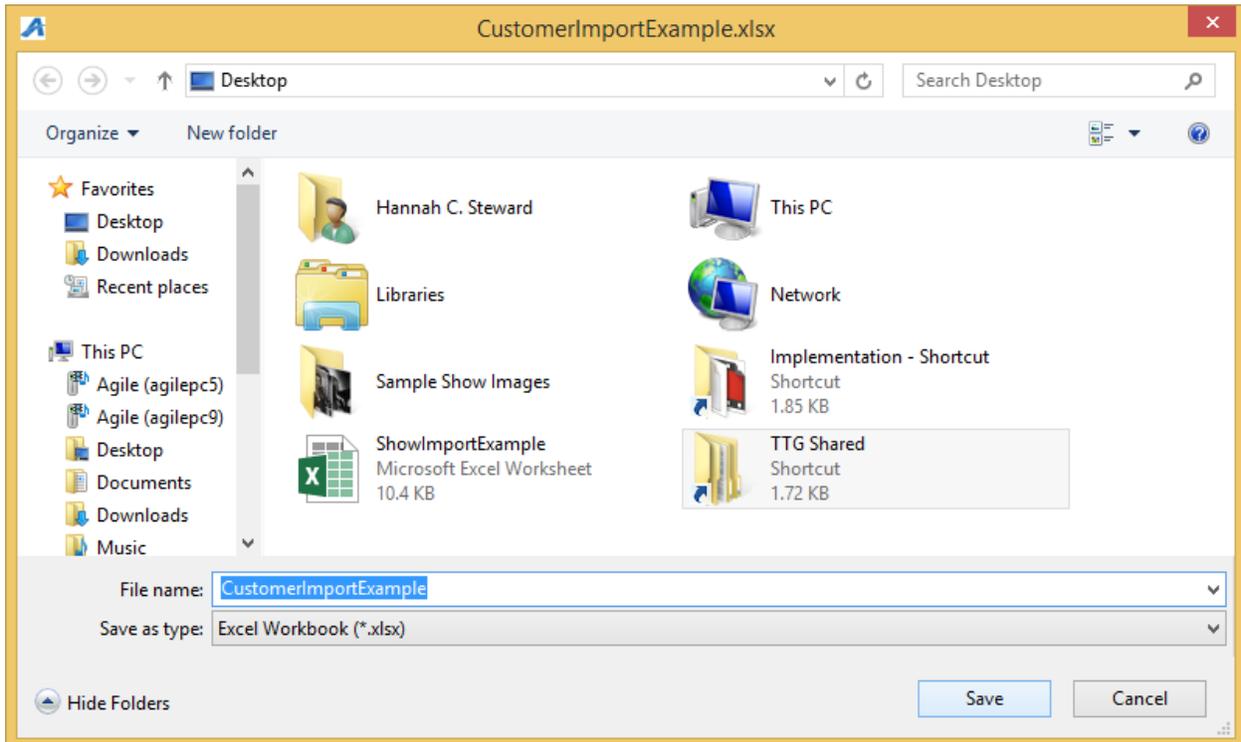


Customer Import
Agile Museum / Tours

Options
 Ignore header row during file import.
 Add Batch Label To Customers

Customer #	Prefix	First Name	M. I.	Last Name	Suffix	Company Name	Credit Limit	Email Address	Opt In	Tax Exempt	Federal Tax ID	State Tax ID	Username	Password	Security Answer
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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.

1	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)
2	1234		John	M	Smith				0 johnsmith@agiletix.com	TRUE
3										
4										
5										
6										
7										
8										
9										
10										

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.

Customer Import
Agile Museum / Tours

Options

Ignore header row during file import.

Add Batch Label To Customers

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.

Customer Import
Agile Museum / Tours

Options

Ignore header row during file import.

Add Batch Label To Customers

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

Customer Import
Agile Museum / Tours

Options

Ignore header row during file import.

Add Batch Label To Customers

Customer #	Prefix	First Name	M. I.	Last Name	Suffix	Company Name	Credit Limit	Email Address	Opt In	Tax Exempt	Federal Tax ID
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Add Customer Remove Customer **Load File** Import Example

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.

Customer Import
Agile Museum / Tours

Options
 Ignore header row during file import.
 Add Batch Label To Customers August 4, 2015

Prefix	First Name	M. I.	Last Name	Suffix	Company Name	Credit Limit	Email Address	Opt In	Tax Exempt	Federal Tax ID	State Tax ID	Username	Password	Security Answer	Operator Notice	Custo
1	John	M	Smith			0	johnsmith@agiletix	<input checked="" type="checkbox"/>	<input type="checkbox"/>			jsmithuser	jsmithpass	answer	<input type="checkbox"/>	
2	Tom		Buchanan			0	sportsman3@agilei	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
3	Daisy		Buchanan			0		<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
4	Jay		Gatsby			0	greenlight@agiletix	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
5	Nick		Carraway			0	crazywriter9@agile	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
6	George	B	Wilson			0	watchingeyes@agi	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	

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.

Customer Import
Agile Museum / Tours

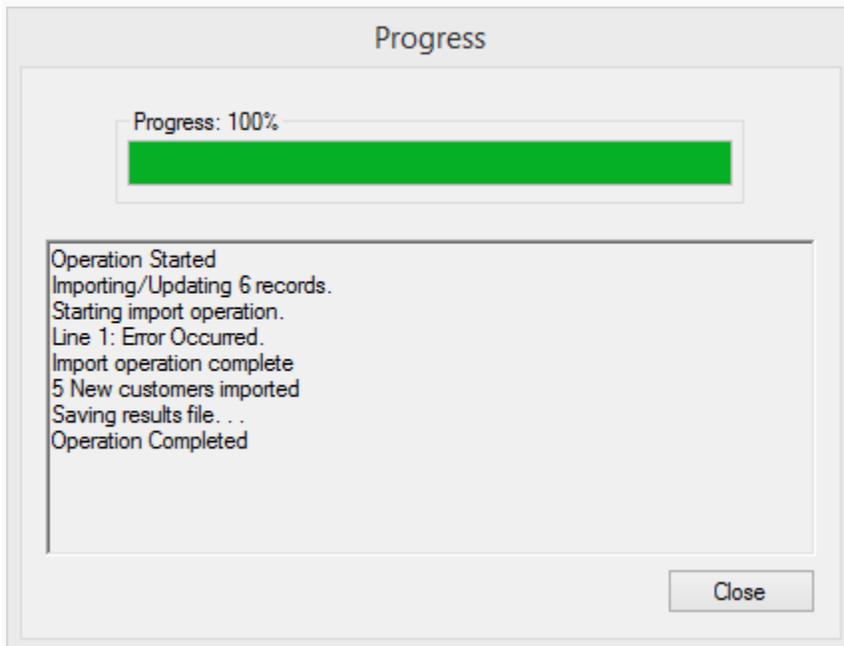
Options
 Ignore header row during file import.
 Add Batch Label To Customers August 4, 2015

Prefix	First Name	M. I.	Last Name	Suffix	Company Name	Credit Limit	Email Address	Opt In	Tax Exempt	Federal Tax ID	State Tax ID	Username	Password	Security Answer	Operator Notice	Custo
1	John	M	Smith			0	johnsmith@agiletix	<input checked="" type="checkbox"/>	<input type="checkbox"/>			jsmithuser	jsmithpass	answer	<input type="checkbox"/>	
2	Tom		Buchanan			0	sportsman3@agilei	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
3	Daisy		Buchanan			0		<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
4	Jay		Gatsby			0	greenlight@agiletix	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
5	Nick		Carraway			0	crazywriter9@agile	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	
6	George	B	Wilson			0	watchingeyes@agi	<input checked="" type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	

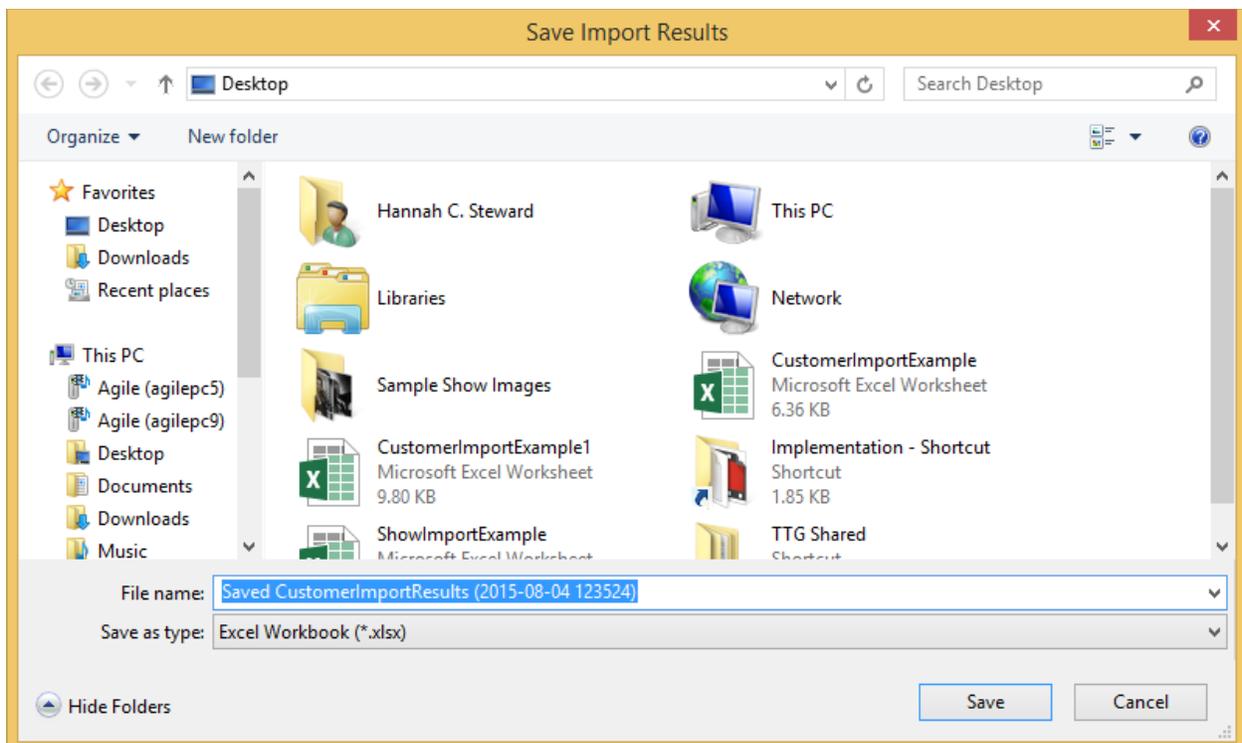


Add Customer Remove Customer Load File Import Example Import

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

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