

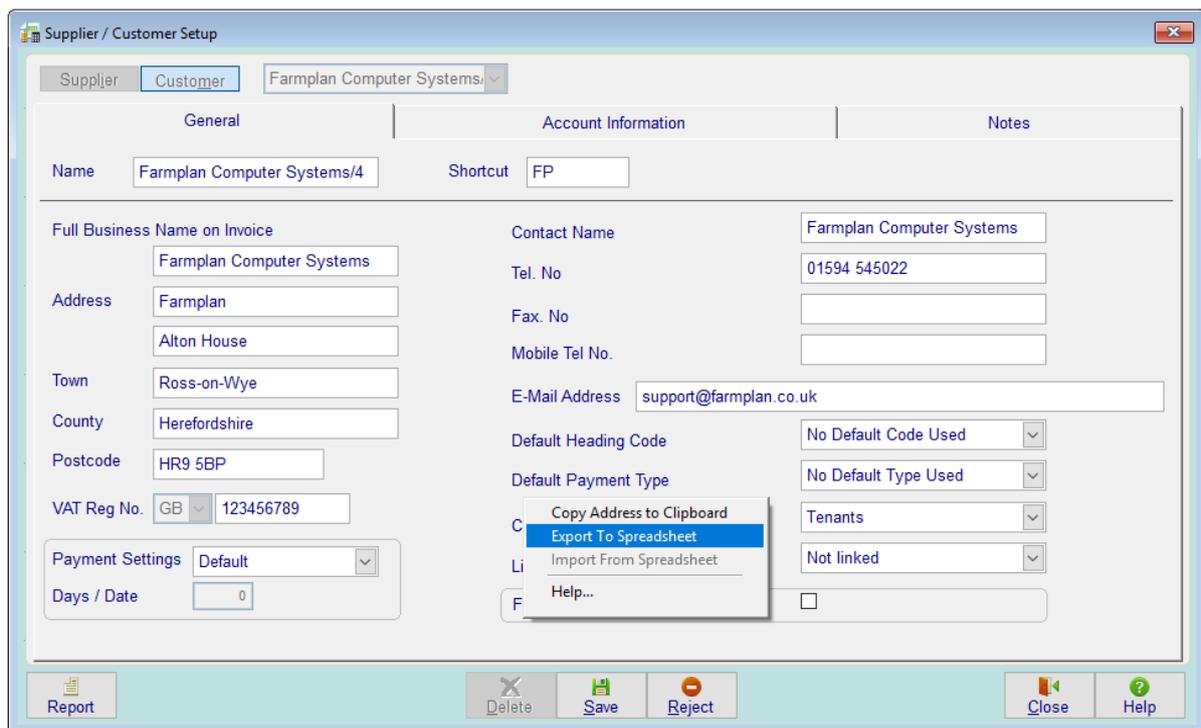
Importing Customer Details from Business Manager

If you are already using our Business Manager program you may have the majority of your customer details already set up. To save time it is possible to transfer them automatically into the Sales Order Processing program.

Export from Business Manager

Go to Business Manager and take the option Setup – Suppliers/Customers – Suppliers/Customers Setup and click on the Customer tab.

Right click anywhere on this screen and take the option ‘Export To Spreadsheet’.



You will then be asked to allocate this file a name and save it as an .xls file. The actual name and location of the file will not matter but it is important that you take a note of both as you will need to find it again when you import it into Sales Order Processing.

Please note, any customers marked as Finished will not be exported.



Export from another dataset of Sales Order Processing

Within Sales Order Processing, go to Setup > Customers and click on the button labelled 'Import' in the top right hand corner of the screen. This will allow you to select the option to 'Export to Excel'. As with the Business Manager option, ensure that you take a note of the name and location of the file that you have created. NB this option will only export the main invoice details of each customer and will not include individual delivery addresses. You may wish to consider using the clone dataset_option instead which will allow you to create a new dataset with the full details of every customer.

Please note, any customers marked as Finished will not be exported.

Import into Sales Order Processing

Before importing records please take a backup of your data by going to File – Backup.

Now return to the Customers option in Sales Order Processing. You will see that there is a button labelled 'Import' at the top right hand corner of the screen.

If you are importing a file from Business Manager or another Sales Order Processing set of data, the file will normally be a .xls file. However if you are importing from another source you may need to change the import option to .xlsx. Click on it and browse to location specified above. Highlight the file and click on 'Select File'. You will be asked to confirm that you wish to import the customers.

Click on OK. Use the arrow keys at the top of the screen to scroll through all the customers to make amendments and delete any unwanted records using the 'Delete' button.