Import Customer Addressbook

If you are new to Industrack and have thousands of Customer Data from your previous system, you just need to export the data from the previous system and save it in an excel file. Please follow the steps below on how to import the Customer Addressbook to Industrack.

Pre-Conditions:

- Use the **Customer Addressbook template** with the columns in the table below**.**
  - **Customer ID* – Customer ID is required**. If you also need to import **other data** (i.e. customer equipment, jobs, multiple service location, invoices, notes, etc.) **that needs to be under/attached to a certain customer**, you need to generate a unique Customer ID for each customer. Customer ID stands as an internal unique ID that will be used to associate the other customer data (ex. customer equipment, jobs, multiple service location, invoices, etc.) to its certain customer.
  - Customer Number – Customer number is the external number that you will be able to see in the Customer Module. Unlike Customer ID, a Customer Number is not required.
  - Customer Name column* – is the Company Name this column is required, if you have residential customers you can input the contact first and last name of your customers both in the Company Name column and Contact First and Last Name column.
  - Contact First and Last Names column* – This column is also required however, it is okay to input either the last name or the first name as long as one of them is there. If you don't have the First Name, the Last Name is fine and vice versa.
- If the customer has multiple contact numbers, please note that the system only supports 2 which are Phone and Mobile.
- The file should not have duplicate records. If it does, please note that they will be imported separately.
- Check for bad data in the file i.e. multiple contact numbers in the Phone column, Multiple names. Importing files in the system with Bad Data will lead to an unsuccessful import.
- Make sure to delete the column names before you proceed with the import. Otherwise, the column names will be imported as a customer.
- After importing Addressbook successfully, please make sure to validate all customer's addresses.

Customer Addressbook Template

Note that columns with (asterisk) ***** are required.

Customer Number/Customer ID*	Company Name*	First Name*	Last Name*	Phone	Email	Street*	City*	State*	Zip*	Site Notes	Office Notes
1	Carrington Atlantic	Fallon	Carrington	(863) 665-6408	Fallon@ca.com	36 Grover Blvd	Hartwell	GA	30643	This is a site note.	This is an office note.

How to Import Customer Addressbook

1. Click Settings, the orange gear icon > Integrations > Import List > ACTIONS > **Import AddressBooks**.
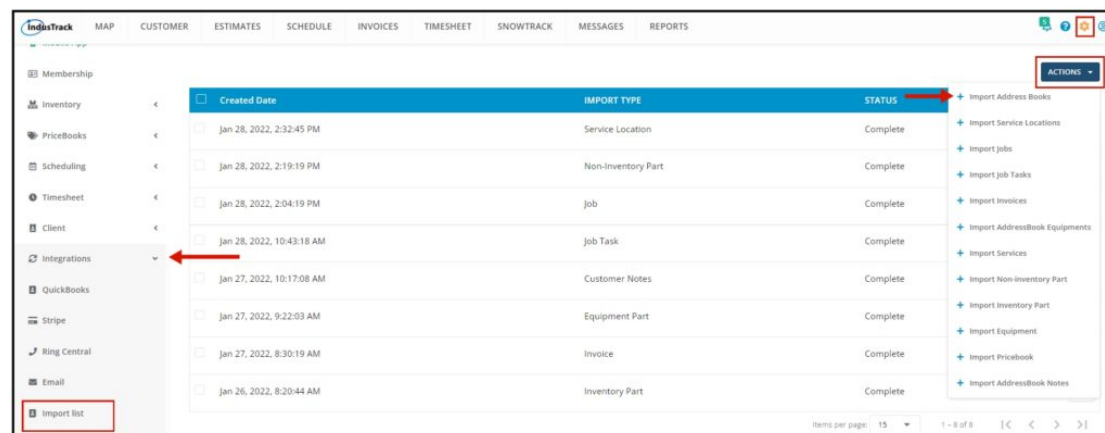
2. An Import Addressbook window will pop up. Select your Timezone, Click Upload and select the correct Excel file to be imported.

3. Map the corresponding column names in the file then click **Save**.

4. After the file has been uploaded, the status should be **COMPLETE**. To verify if the upload is successful, **click on the 3 dots beside status and click details.**
Note that if the Data has thousands of records, it may take a while for the status to change into COMPLETE.

5. By clicking on **details**, if all rows were successfully imported you should be able to see it here. The number of **All Rows** and the **number of successful** rows should match.

6. If all Rows were successfully imported, do a spot check in the Customer module and verify the information imported is ACCURATE.

7. If unsuccessful, rows with the error will not be uploaded and the number of successful rows will not be the same as the total number of rows in the file. This is what happens if you import files with Bad Data.

8. You will be able to see the line number in your file where the error is located and the line's content. The detail of the error is also explained in the error tab.

9. You can export the error detail to excel and determine what is causing the error.

10. After the error is determined, edit your Addressbook File remove bad data then reimport back again.