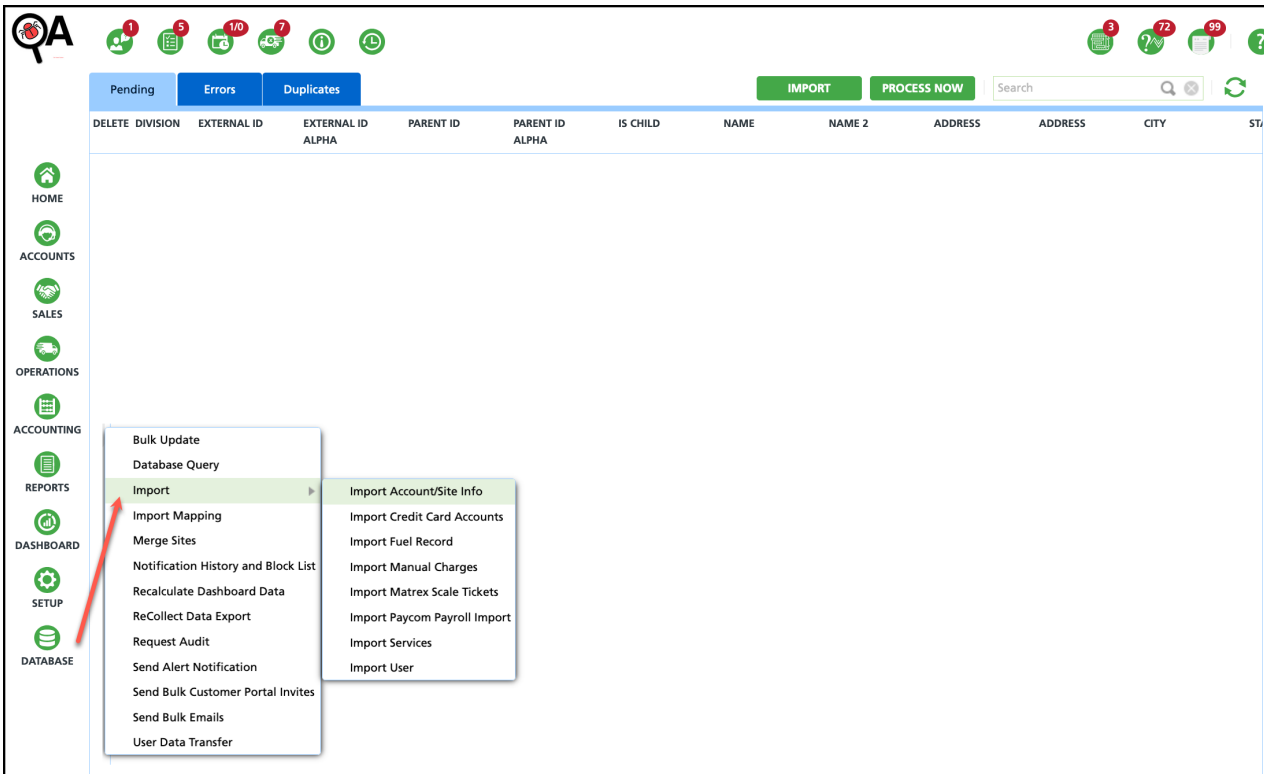


Import Account/Site Info

Last Modified on 10/08/2024 11:47 am CDT

Pathway: Database > Import > Import Account/Site Info

Use the Import Account/Site Info tool to upload customer and site data from a .CSV file or PDF. Ensure your file meets the required format specifications for a successful import. If any errors are detected, the import will fail, and a message will indicate the issue.



Permissions

The following permissions are required to import accounts and sites:

Permission ID	Permission Name
354	Import Accounts, Sites and Services

Import File Requirements

The system supports importing both .CSV and PDF files. If an error is found in the .CSV file, a message will appear showing the specific row and column where the issue occurs. Since columns are referenced numerically, you may want to adjust your .CSV file (Excel spreadsheet) to display columns as numbers. To do this, enable the R1C1 reference style in your Excel settings.

CSV File Format

Column	Header	Requirements	Instructions
1	Division ID	Required	Division unique id number

2	External ID	Required	MUST BE UNIQUE - NOT EXIST OLD ID IN SYSTEM external_siteID previous system billing site id
3	External ID Alpha	Required	MUST BE UNIQUE - NOT EXIST OLD ID IN SYSTEM external_siteID previous system billing site id
4	Parent ID	Required	MUST BE UNIQUE - NOT EXIST OLD ID IN SYSTEM external_parentID previous system billing account id
5	Parent ID Alpha	Required	MUST BE UNIQUE - NOT EXIST OLD ID IN SYSTEM external_parentID previous system billing account id
6	Account Division ID	Required	
7	Is Child	Required	0 = 1st site/parent 1 = child to parent_id
8	Account/Site Name		
9	Acct Name 2		
10	Address Line 1	Required	
11	Address Line 2		
12	City	Required	
13	State	Required	
14	Zip	Required	
15	Phone		
16	Fax		
17	Email		
18	Latitude		
19	Longitude		
20	Billing Name	Required	
21	Billing Name 2		
22	Billing Address Line 1	Required	
23	Billing Address Line 2		
24	Billing City	Required	
25	Billing State	Required	
26	Billing Zip	Required	
27	Billing Phone		
28	Billing Email		
29	Bill Co.	Required	Always 1
30	Bill To	Required	Always 2
31	Billing Contact Name		

32	Status	Required	0 = inactive 1 = prospect 2 = active
33	Account Sales Rep ID	Required	unique user id 999 = generic house
34	Sales Rep ID	Required	unique user id 999 = generic house
35	Account Since	Required	
36	Last Updated	Required	
37	National Acct	Required	Always 0
38	Site Access		
39	Region		
40	Tax Region		
41	Customer Class	Required	accountclass_id
42	Service Region	Required	serviceregion ID
43	Parent Status	Required	0 = inactive 1 = prospect 2 = active
44	Account Warning Note		
45	Site Warning Note		
46	Source	Required	
47	Bill Group	Required	
48	Terms	Required	

PDF File Format

Column	Header	Requirements	Instructions
0	Division ID	Required	Navu Division ID
1	External ID	Required	Data Source unique Id Unique id for site
2	External Alpha ID	Required	Data Source unique Id Unique id for site same as row above
3	Parent ID	Required	Navu Account ID Unique id for parent account
4	Parent ID Alpha	Required	Data Source unique Id for Parent Unique id for account same as row above
5	Account Division ID	Required	Navu Division ID
6	Is Child	Required	0 = Parent 1=Additional site for existing account
7	Site Name	Required	
8	Site Name 2		
9	Site Address Line 1	Required	
10	Site Address Line 2		

11	Site City	Required	
12	Site State	Required	
13	Site Zip	Required	
14	Phone		
15	Fax		
16	Email		
17	Latitude		
18	Longitude		
19	Billing Name	Required	
20	Billing Name 2		
21	Billing Address Line 1	Required	
22	Billing Address Line 2		
23	Billing City	Required	
24	Billing State	Required	
25	Billing Zip	Required	
26	Billing Phone		
27	Billing Email		
28	Billing Co		Used by Route manager (desert micro) import
29	Billing Contact Name		Always 2 except Route manager (desert micro) import
30	Status	Required	0 = Inactive 1 = Prospect 2 = Active
31	Account Sales Rep ID	Required	999 House Account 998 Unknown or Navusoft user id
32	Site Sales Rep ID	Required	999 House Account 998 Unknown or Navusoft user id
33	Account Since	Required	Date format MM/DD/YYYY
34	Last Updated	Required	Date format MM/DD/YYYY
35	National Acct	Required	Always 0 except Route manager (desert micro) import
36	Site Access		Site access information
37	Region		Used by Route manager (desert micro) import
38	Tax Region		Navu Tax Region ID Pathway: Setup > Accounting > Tax Region
39	Customer Class	Required	Navu Account Class ID Pathway: Setup > Account > Account Class
40	Service Region	Required	Navu Service Region ID Pathway: Setup > Services > Service Region
41	Account Status	Required	0 = Inactive 1 = Prospect 2 = Active 3 = Bad Debt 4 = Credit Hold
42	Account Warning Note		

43	Site Warning Note		
44	Source		Navu Source ID Pathway: <i>Setup > Account > Source</i>
45	Bill Group	Required for Active Status	Pathway: <i>Setup > Accounting > Bill Group</i>
46	Terms	Required for Active Status	Pathway: <i>Setup > Accounting > Term</i>
