

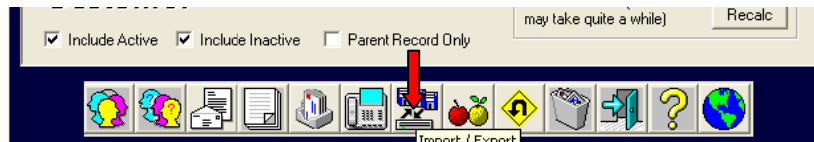
Importing Customer Lists from Text Files

Simple customer lists may be imported into **ADVANTAGE** through use of the import feature in the Marketing screen. More complicated lists may need to be sent to us for handling.

To begin, on the Main Menu, click on Marketing, then Marketing.



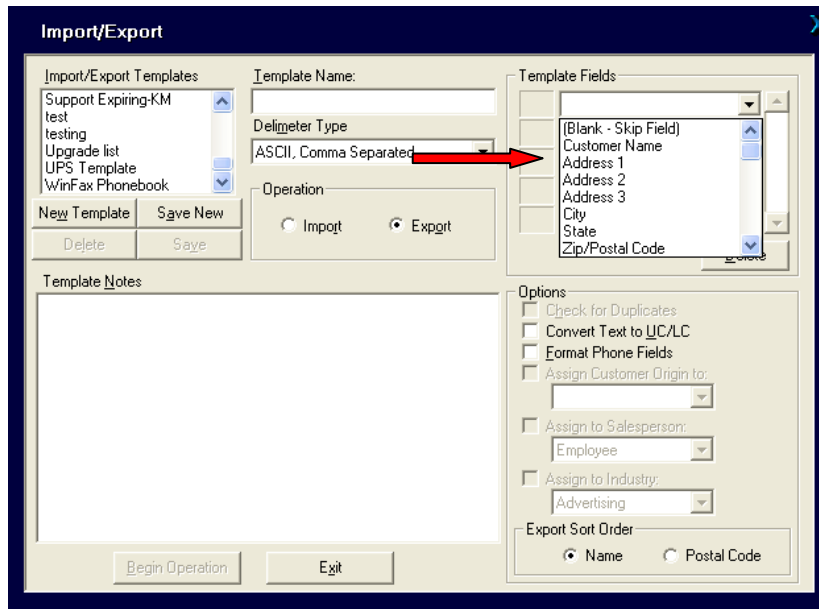
Click on the **Import/Export** icon at the bottom of the **Marketing** screen:



Activity Advantage Software Documentation - Page: 1 of 7

© Copyright Miller Commercial Investments LLC. 2004-2007 All Rights Reserved.

Revised: 3/20/07

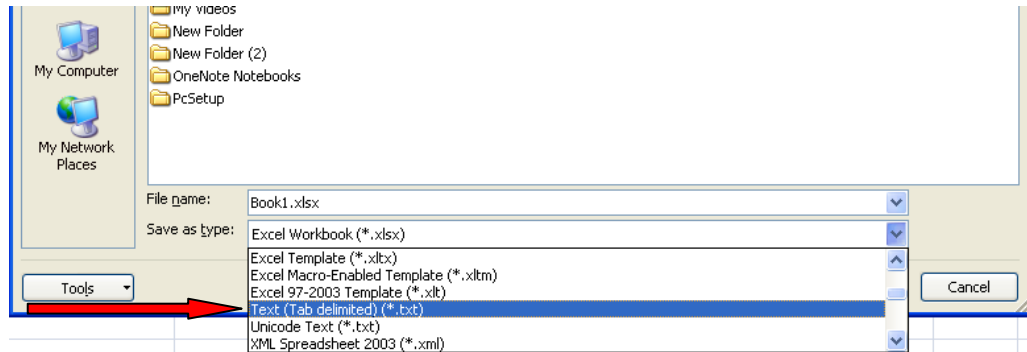


- Click on the drop down menu under **Template Fields**. ***If you need to import any fields that do not appear on this list, you must contact Activity Software Support so that they can perform the import for you.*** If all of your fields appear on this list, you can perform the import on your own.

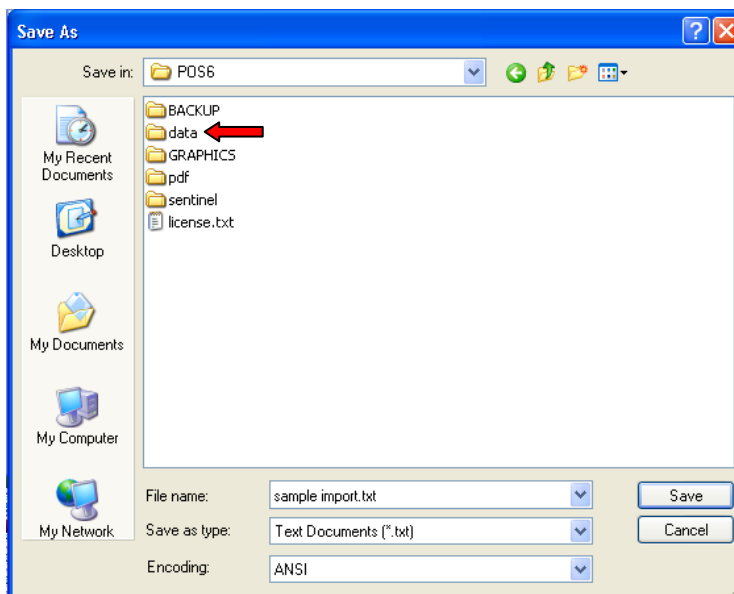
If you have determined that all of your fields are present on the drop down menu, you can proceed with the remaining instructions on how to import customer lists.

Importing Customer Lists

Imported files must be saved in a particular format before they can be imported. The files must be in **text tab delimited** format (.txt). This format is one of the selections when saving customer lists in Excel:



In order to import the list, the .txt file **must be saved in your ADVANTAGE data directory**. You can save the .txt file to this directory by selecting **My Computer, Local Disk C: (or the drive containing ADVANTAGE'S information), Program Files, POS6**, and then **Data**:

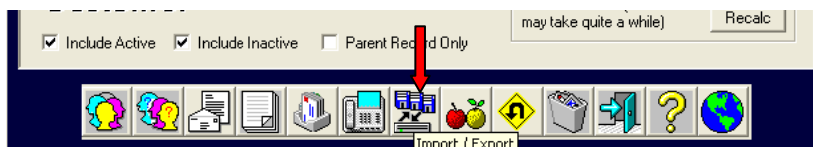


- After saving the .txt file in your **ADVANTAGE data directory**, open **ADVANTAGE**

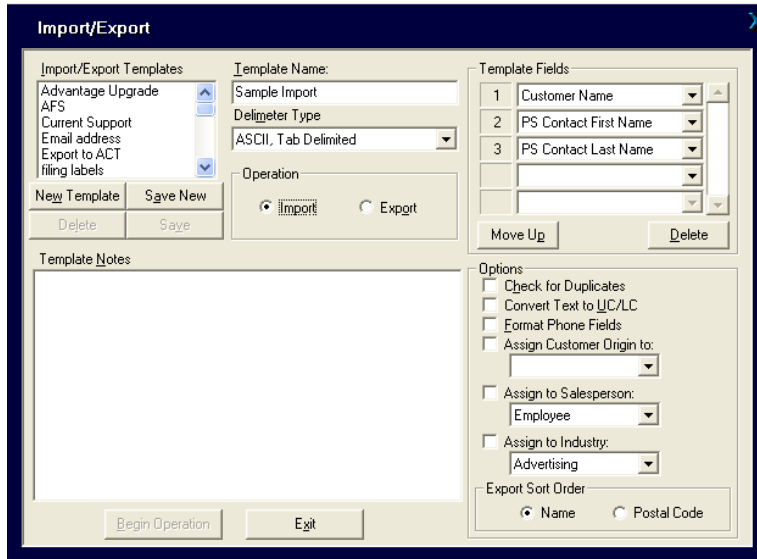
- Click on **Marketing**
- Click on **Marketing** again



- Click the **Import/Export** icon at the bottom of the screen:

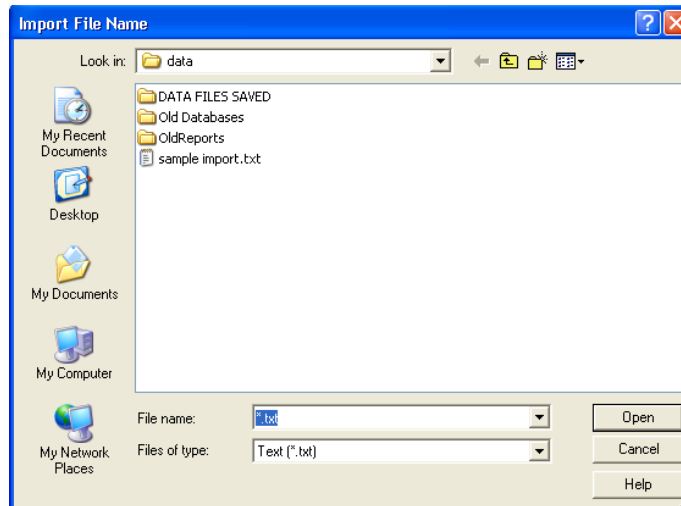


✚ **ADVANTAGE** brings up the **Import/Export** screen:

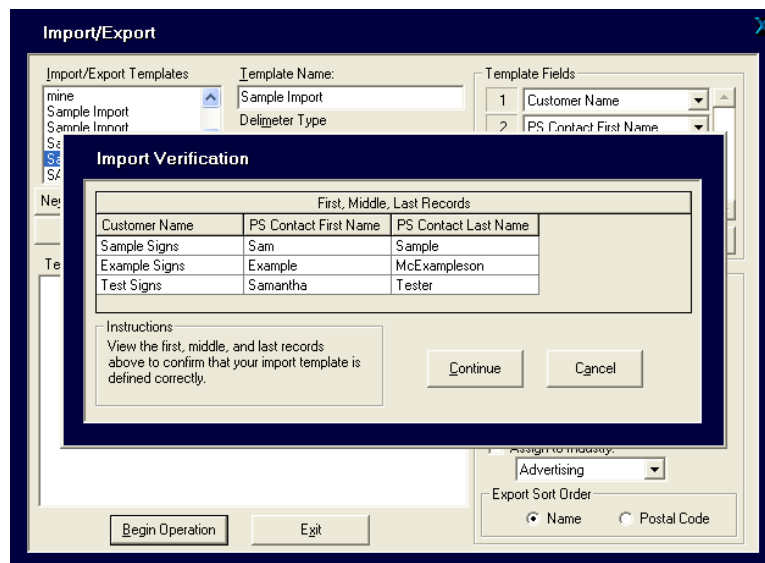


- ✚ Click on **New Template**
- ✚ Type in the new template's name under **Template Name**
- ✚ **Delimiter Type** – make sure **ASCII, Tab Delimited** is selected
- ✚ **Template Fields** - use the drop down menus to select the fields that are in the file that you are going to import. **You will need to select these according to the exact order that they appear in your import file.** For example, if your import (.txt) file lists customer name, address, phone number, you will want to use the drop down menus to select each of these fields in that exact same order.
- ✚ **Options** – select the options that you want **ADVANTAGE** to perform when creating your import template. For example, you can tell **ADVANTAGE** to check for duplicate entries, format your phone fields, and assign an entire imported list to a specific origin, salesperson, and industry.
- ✚ Click **Save New**
- ✚ Find the template you just saved under the **Import/Export Templates** list and click on it
- ✚ Click **Begin Operation**

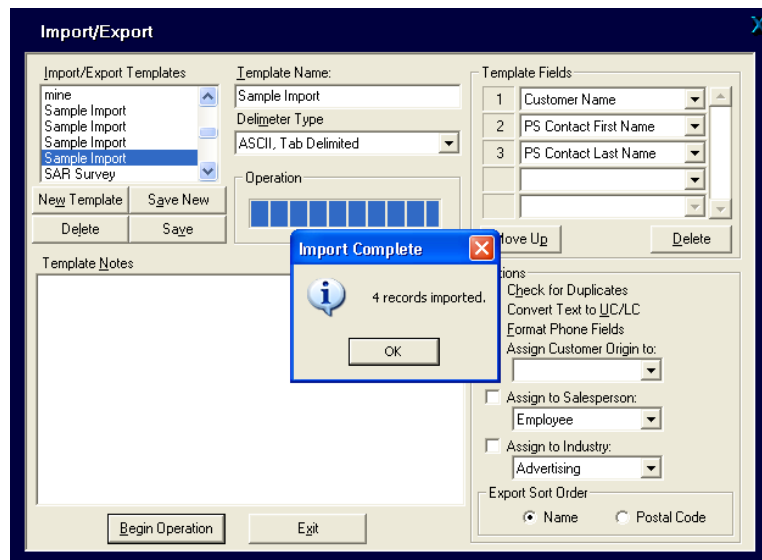
- ✚ **ADVANTAGE** will display your data directory and all of the files that you can choose to import:



- ✚ Choose the file that you wish to import.
- ✚ **ADVANTAGE** will display the import for your verification:



✚ **ADVANTAGE** will then display how many records were imported successfully:



✚ Click **OK**

Your import is now complete. You can save multiple templates and reuse the ones that you have created for future imports.