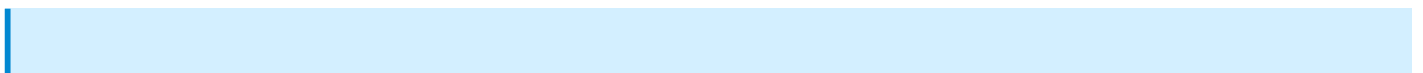
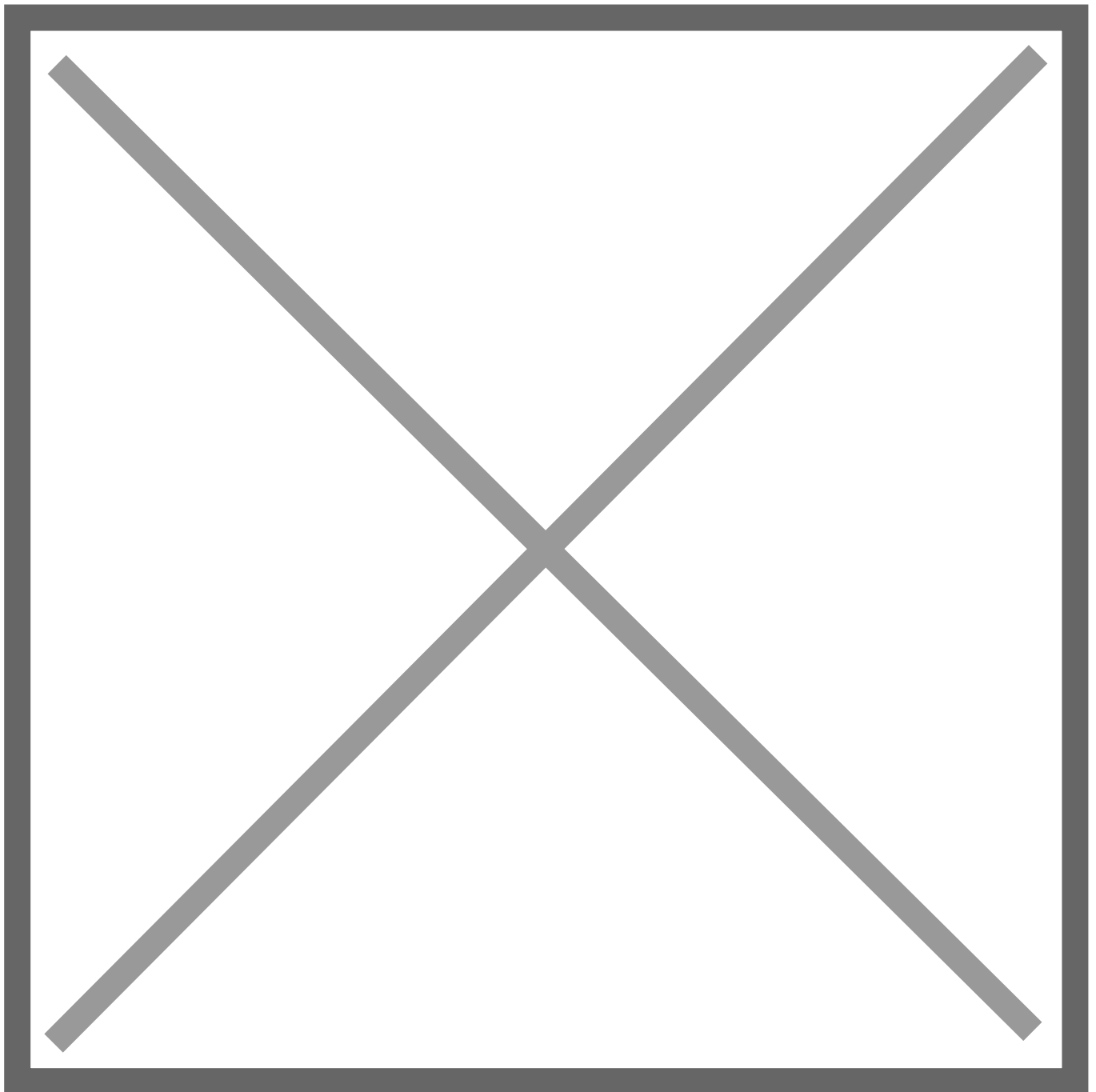


Additional Debtor Property Import

[Debtors Module](#)> [Configuration](#)> [Add. Debtor Properties](#)

Populate your data in Excel into the below template:



The input in the Division, Region, Status and Category fields is always the respective field code, not the description on the field setup. (this is the code on the setup above)

Once the file has been compiled, save the file as a CSV (comma Delimited) file

Upload Process:

Log onto the company

Go to Debtors Module> Configuration> Debtor Setup

Debtors Module

Configuration

Debtors Setup

Add. Debtor Properties

Quote Template Setup

Debtors Group Matrix Discount

Debtors Setup

Search Add Edit Delete Clone Create Reminder Debtor Enquiry Debtor History Functions Import

Basic Search Custom Search Expand

Debtors Code: Debtor Name:

Order By: Code Search Type: All

Search: Debtors and Prospects L

Contact Name: E-mail Address:

Division: All Mobile No:

Main Details Statutory CO Link Support Task Item Sales Pricing Level Link Items

Page 0 of 0 Remove Paging:

#	Att	Memo	Status	Web	Code	Company Name	Short Name
---	-----	------	--------	-----	------	--------------	------------

Click on the Import Tab dropdown arrow

Select "Import Additional Properties"

Debtors Setup

Search Add Edit Delete Clone Create Reminder Debtor Enquiry Debtor History Functions Import Print / Export Import / Export

Basic Search Custom Search Expand

Debtors Code: Debtor Name:

Order By: Code Search Type: All

Search: Debtors and Prospects L

Contact Name: E-mail Address:

Division: All Mobile No:

Main Details Statutory CO Link Support Task Item Sales Pricing Level Link Items

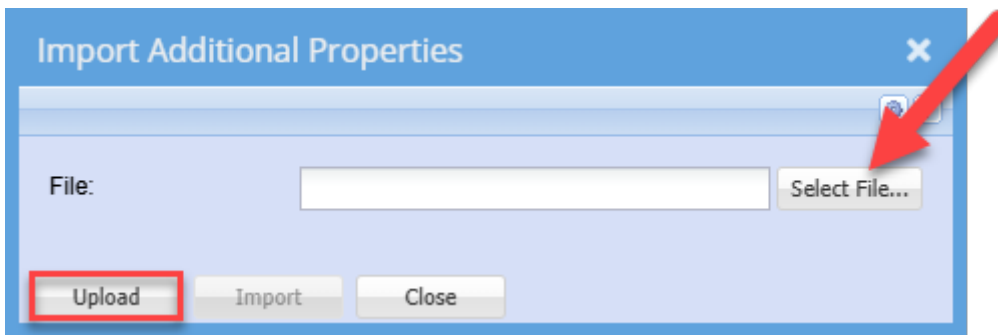
Page 1 of 1 Remove Paging:

#	Att	Memo	Status	Web	Code	Company Name	Short Name
---	-----	------	--------	-----	------	--------------	------------

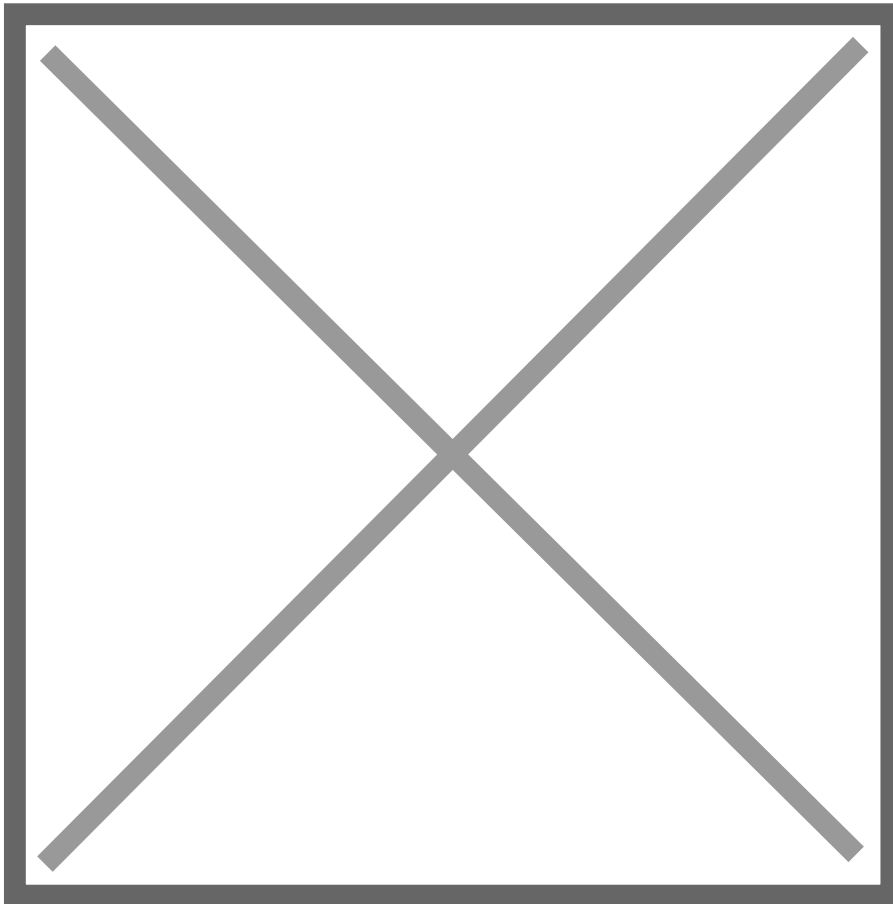
- Import Acct Managers
- Import Additional Properties
- Import Legal Hand Over
- Import Linked Brands
- Import Recurring Transactions
- Import Statutory Information
- Import Time Log Employee Defaults
- Import Time Log Global Budget
- Import VCF to new customer

Search for the file that you saved earlier

Click Upload

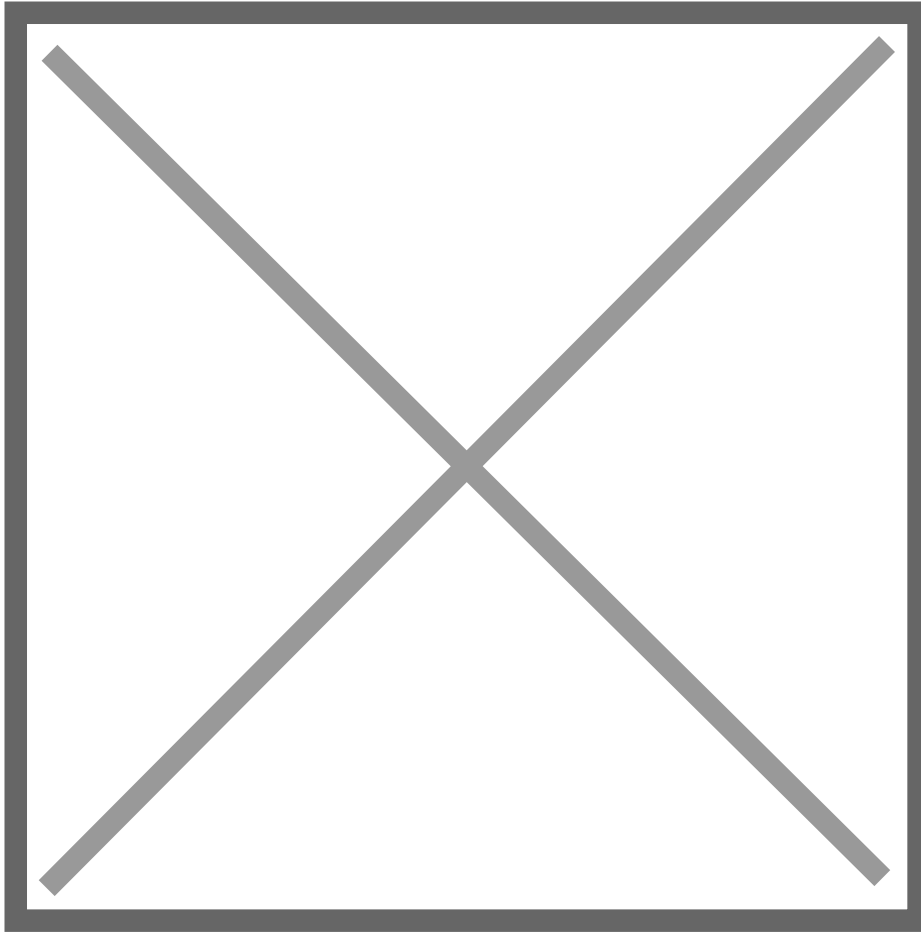


The below Message will be displayed (assuming the import file is correctly formatted)



Click OK

Click Import



The system will verify the details on your file, e.g. All account codes exist, and all category codes exist

If all is OK, the file will be imported and all respective debtor accounts updated accordingly.

If errors are received, these will be listed.

Make the necessary corrections on your import file and resave the file

Then retry the import as per the above process

Revision #4

Created 19 July 2023 13:00:29 by Paige

Updated 17 December 2024 23:47:11 by Pamela