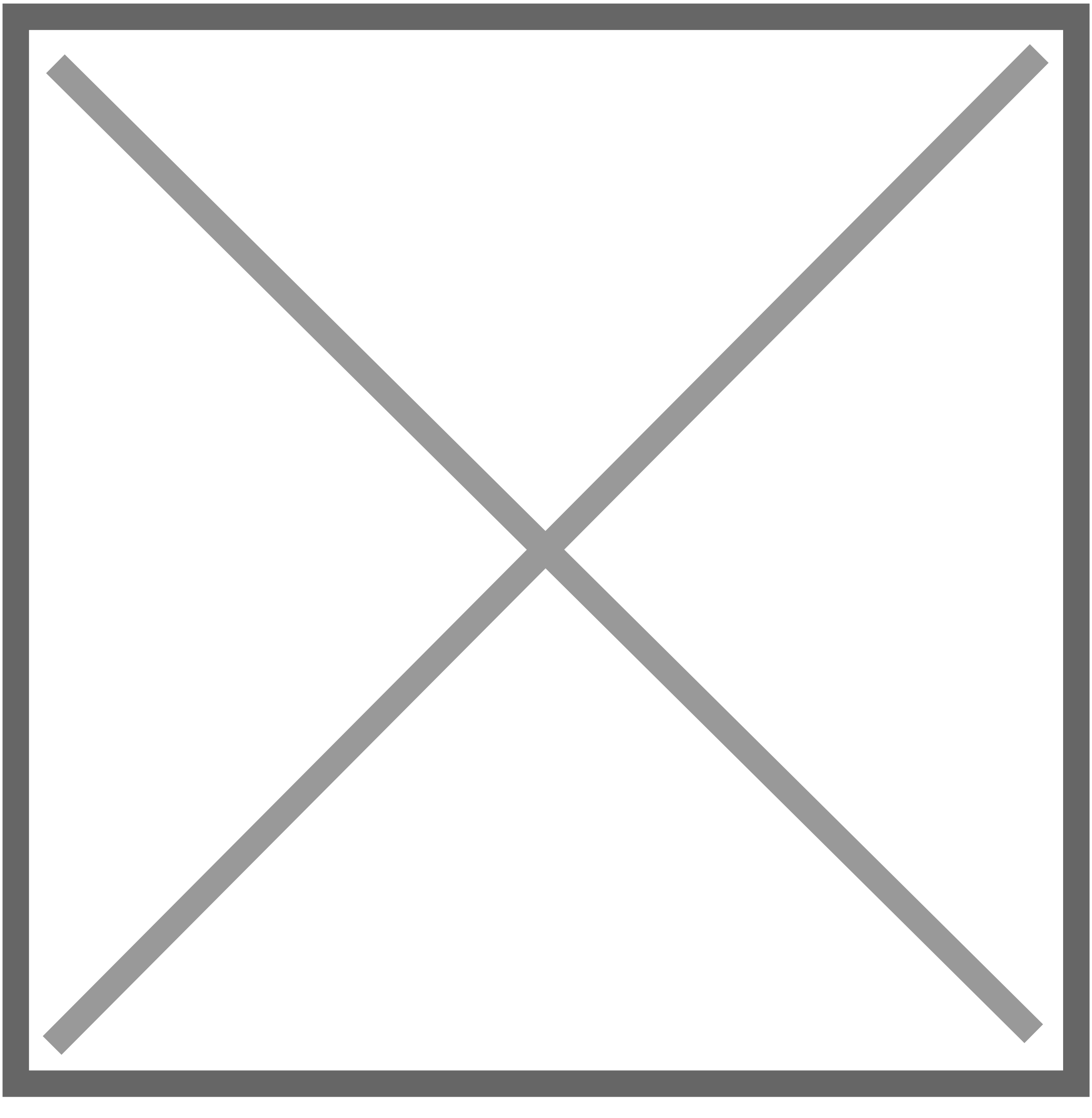
Additional Debtor Property Import

Debtors Module> Configuration> Add. Debtor Properties

Populate your data in Excel into the below template:



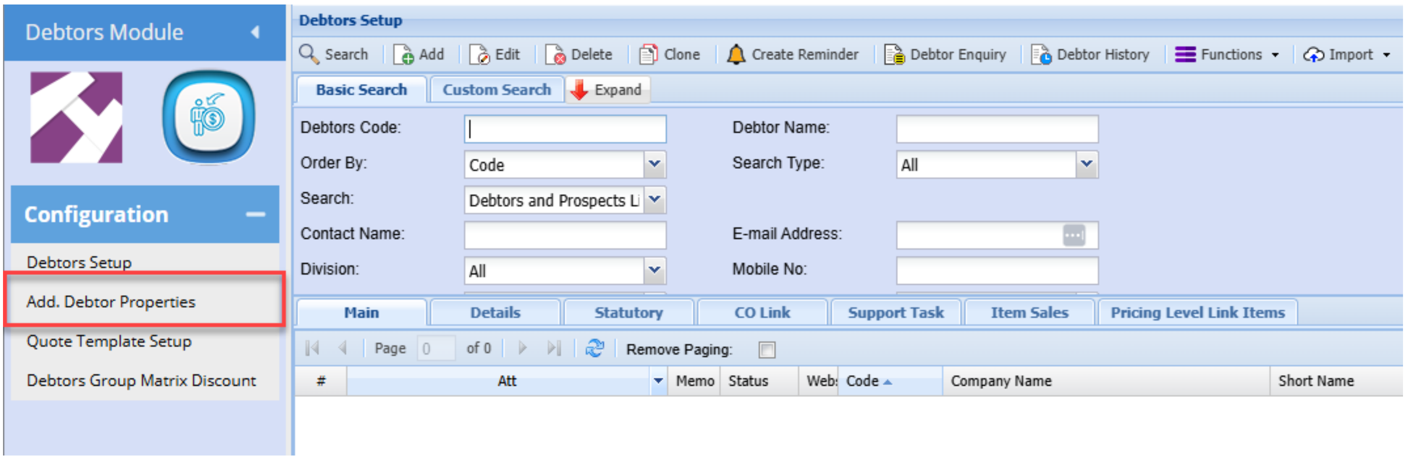
> The input in the Division, Region, Status and Category fields is always the respective field code, not the description on the field setup. (this is the code on the setup above)

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

Upload Process:

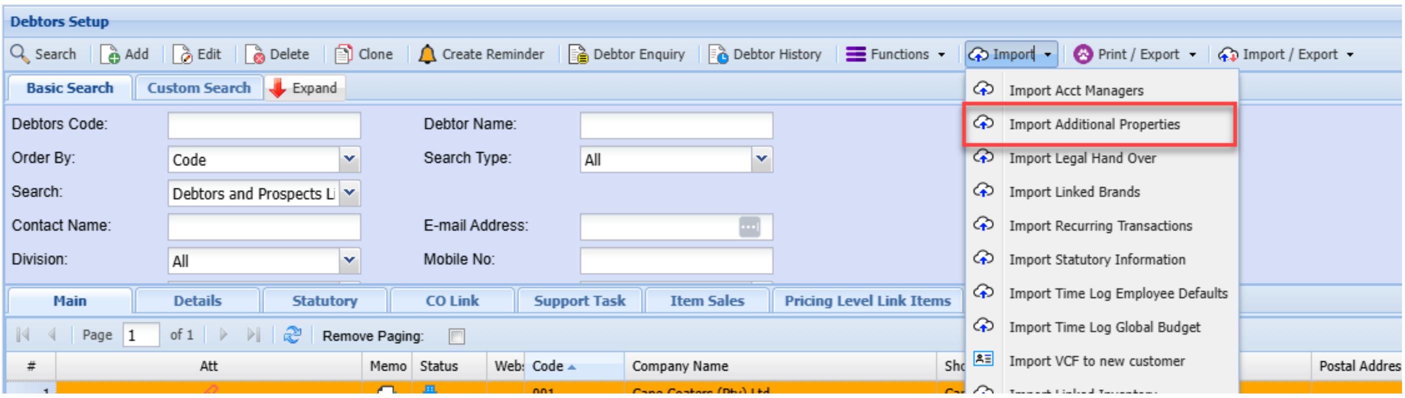
Log onto the company

Go to Debtors Module> Configuration> Debtor Setup



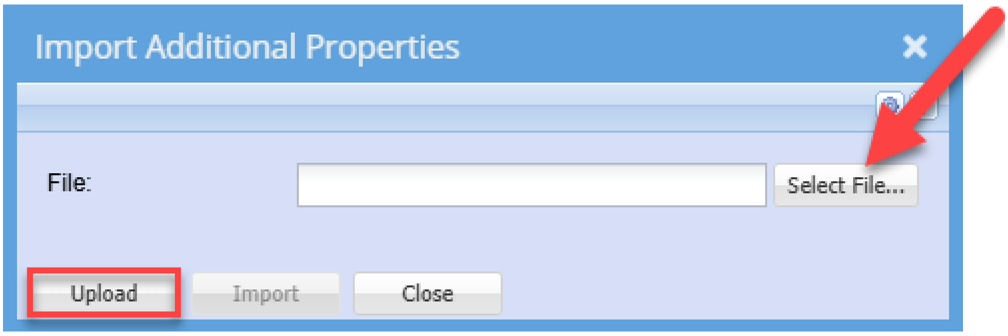
Click on the Import Tab dropdown arrow

Select “Import Additional Properties”

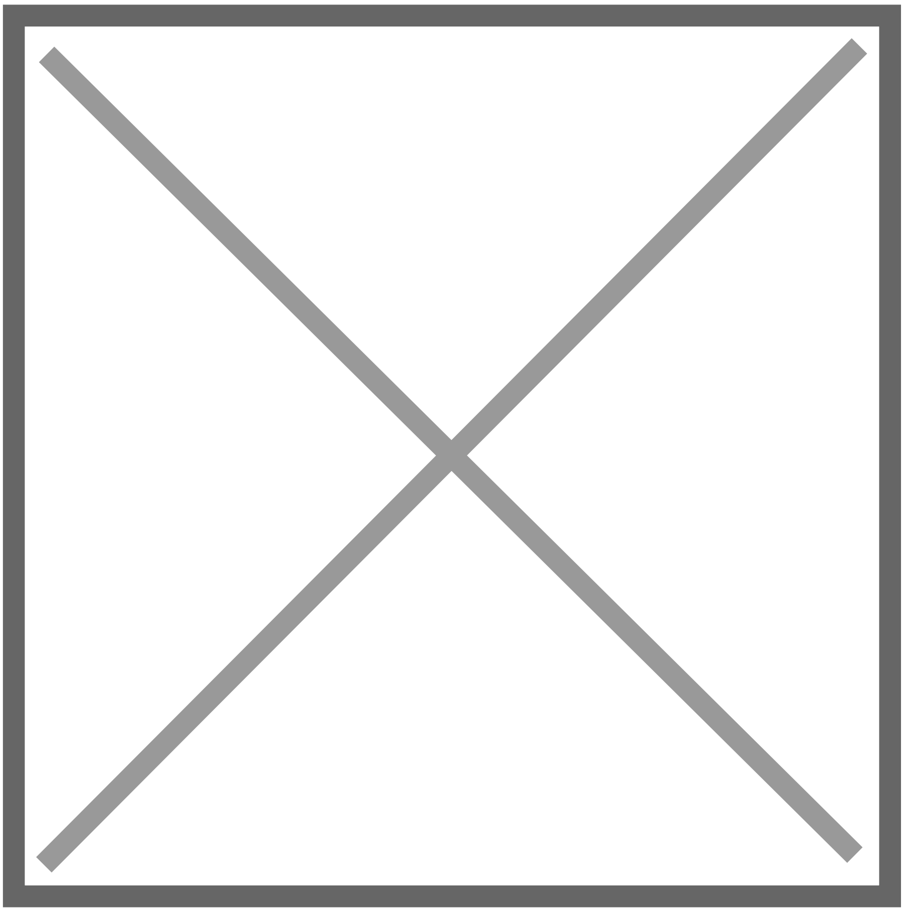


Search for the file that you saved earlier

Click Upload

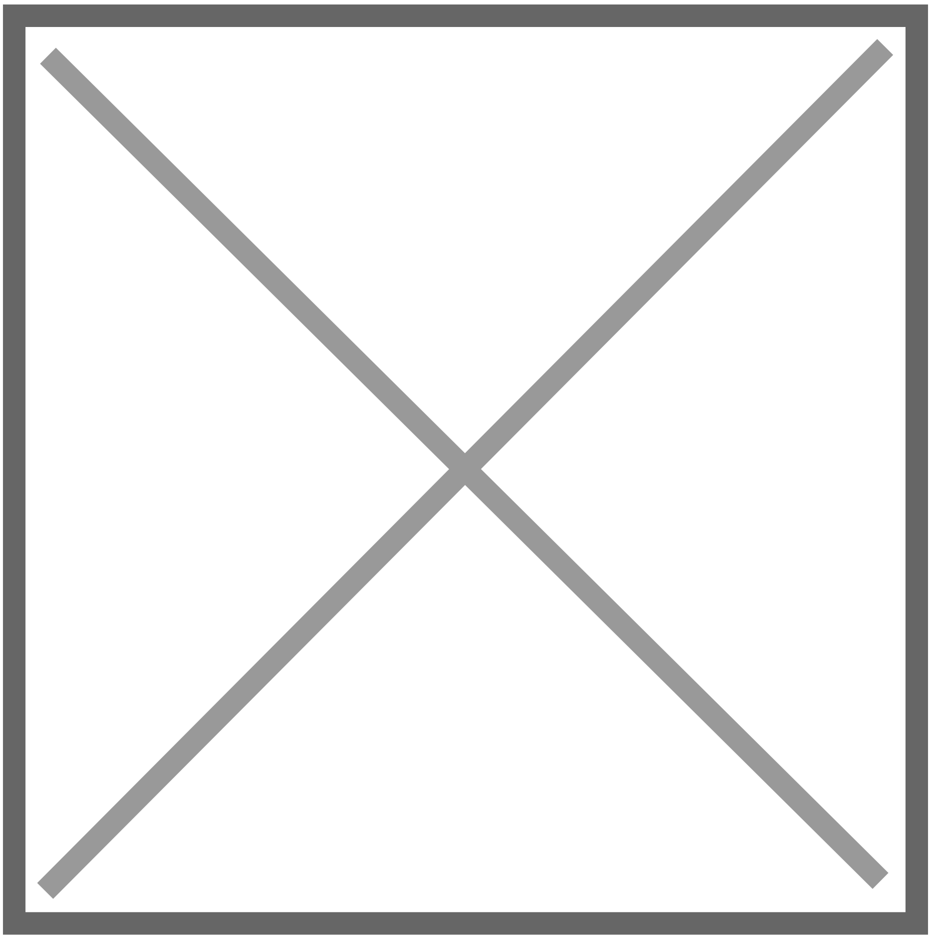


The below Message will be displayed (assuming the import file is correctly formatted)



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