



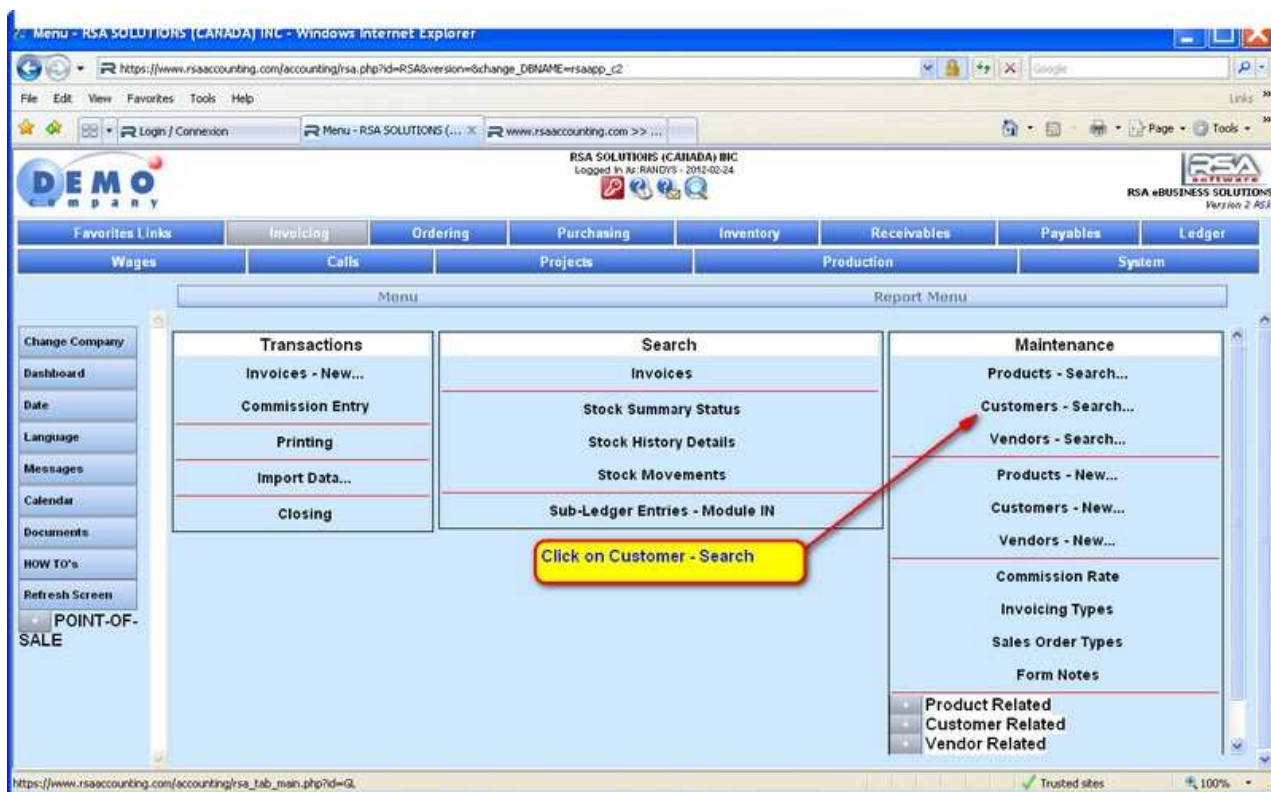
IMPORTING CUSTOMERS INTO RSA

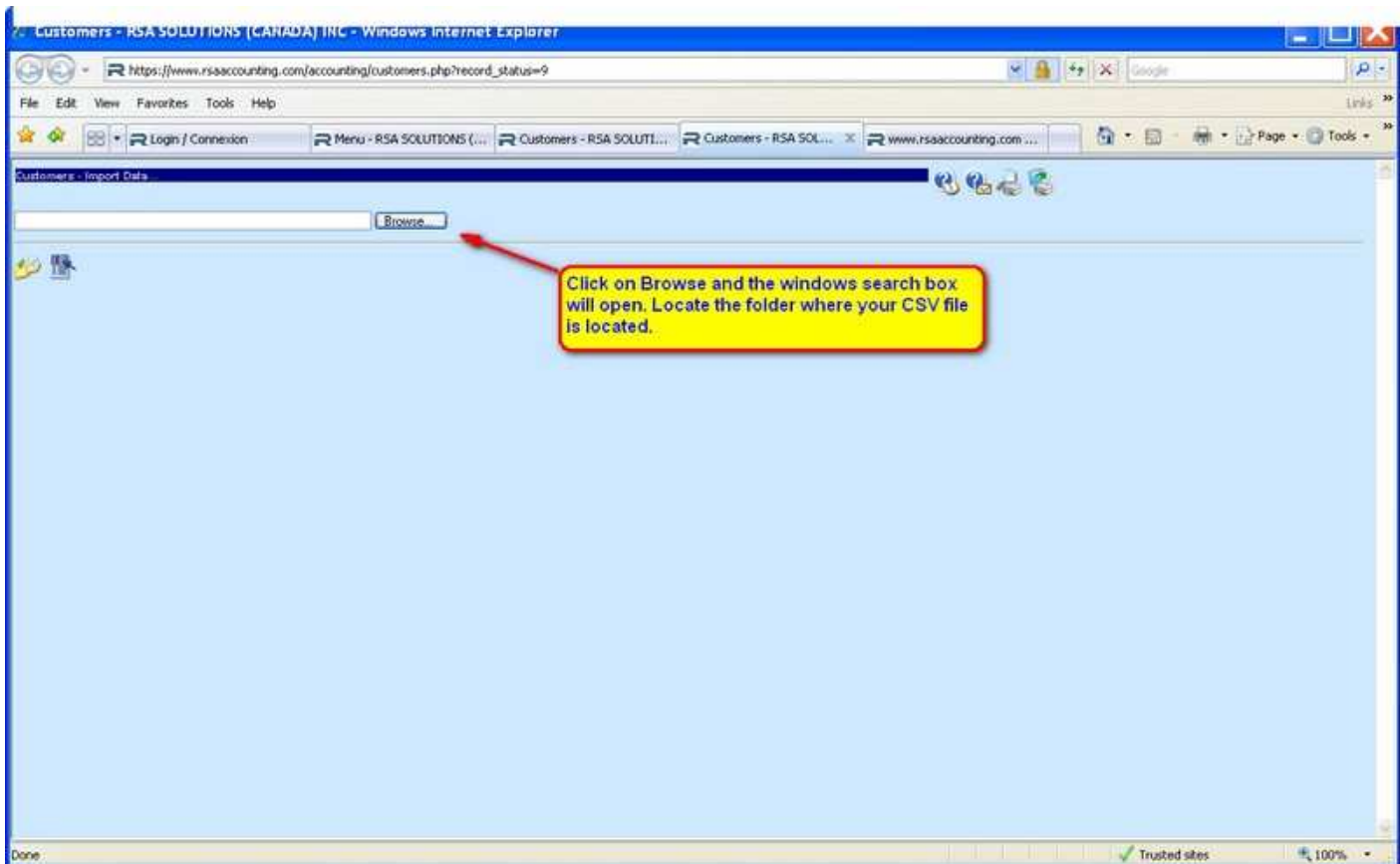
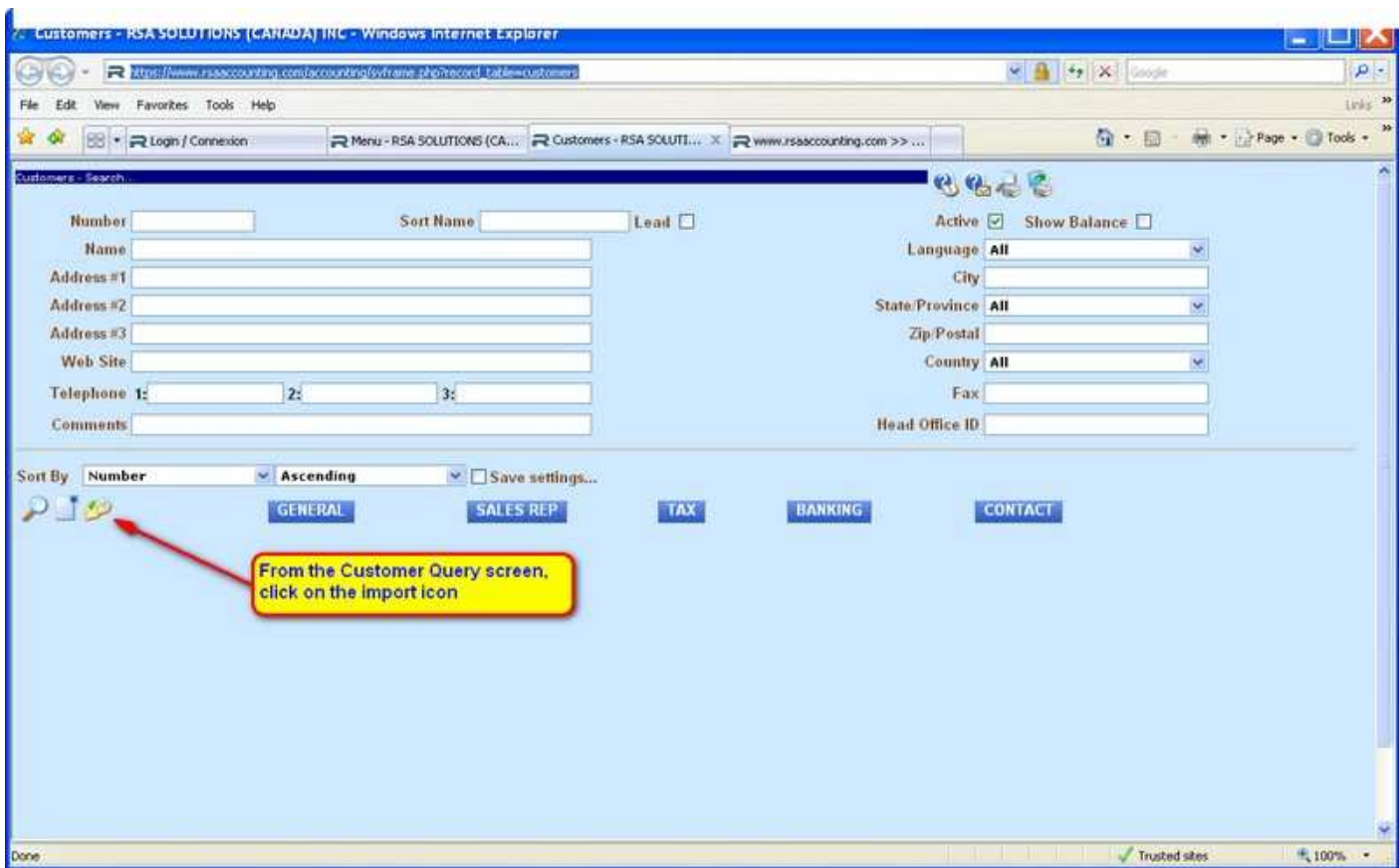
To import customers into RSA please download the RSA_CUSTOMER_IMPORT.csv

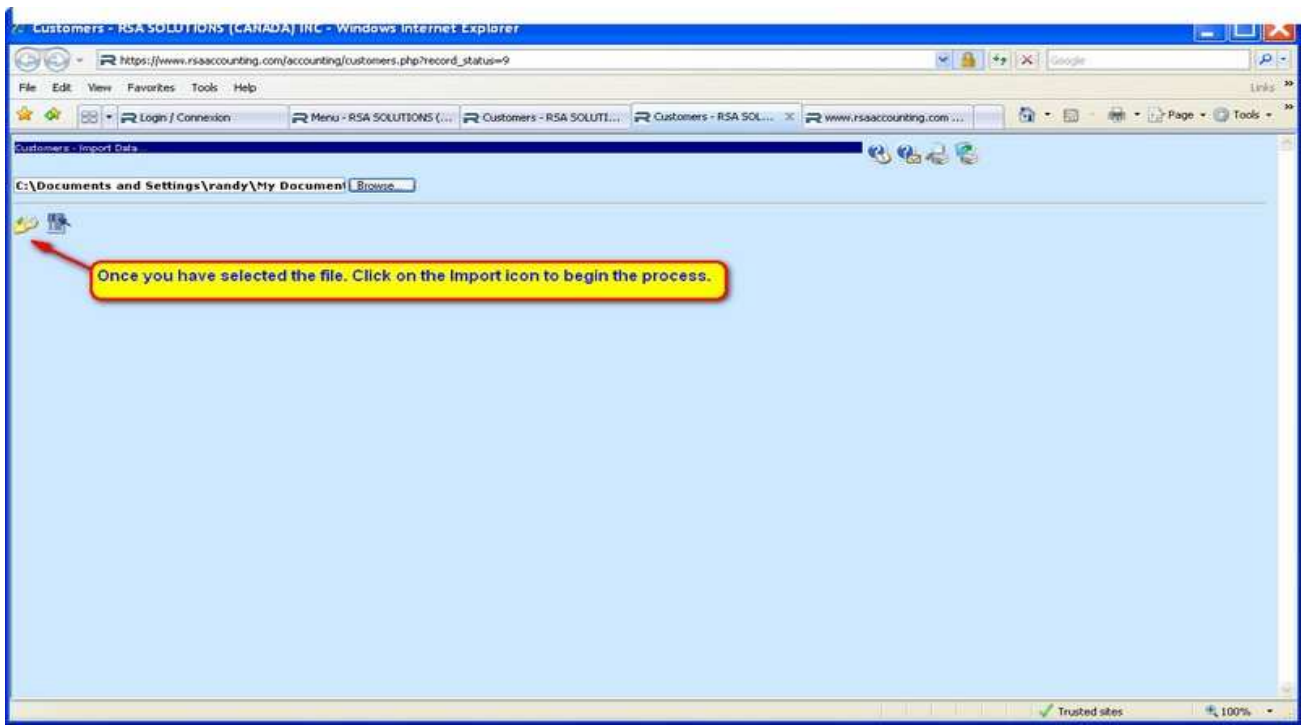
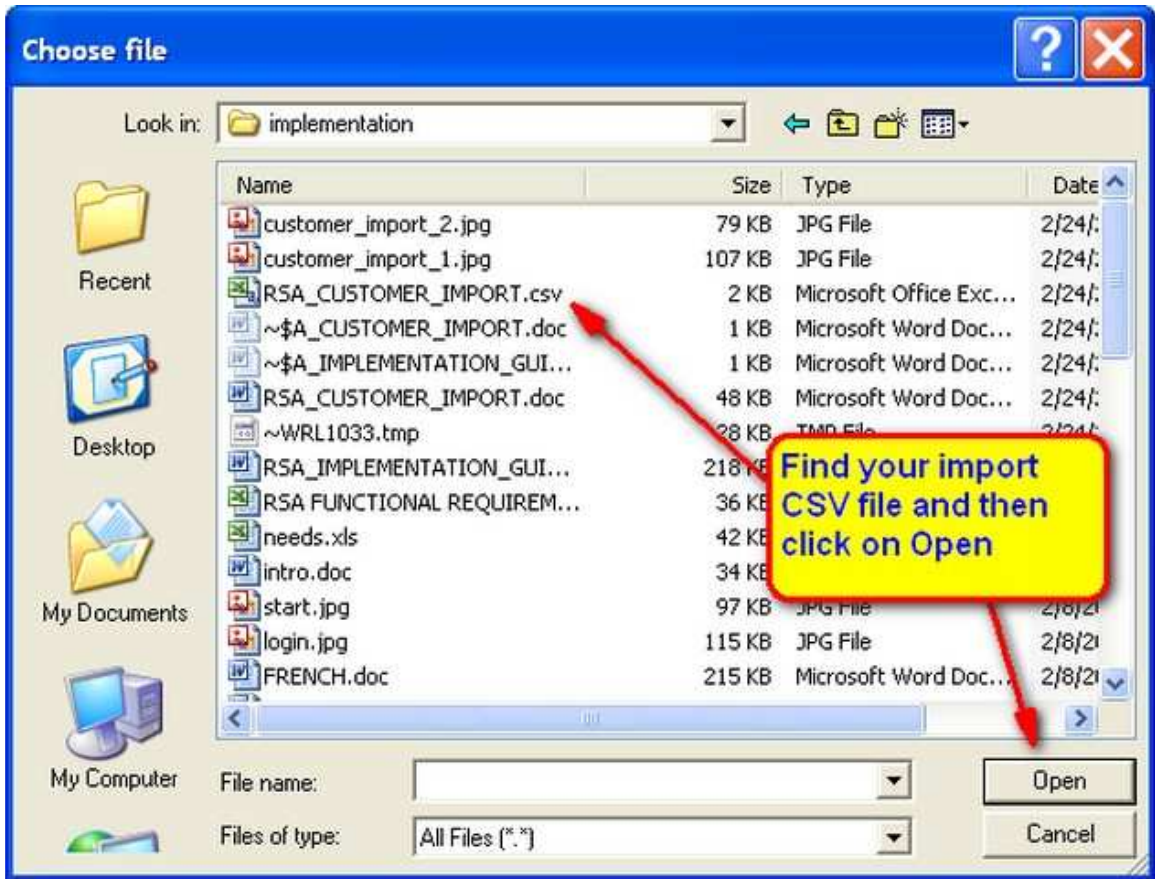
You can open the file in Excel.

There are some sample records, remove them before entering your necessary information.

Once you are ready, complete the following steps.







Once completed RSA will display the number of records imported

Transaction [IMPORT DATA...] Accepted, Value [7]

COLUMN DESCRIPTIONS

CUSTOMERNO

- Alpha/numeric must be unique.
- Cannot be blank.
- The acceptable characters are :
A-Z 0-9 - (hyphen) _ (underscore) . (dot)
- Any lower case characters will be replaced with UPPER case.
- `~!@#\$%^&*()+=[{}]\|'";:~/><, or blank space will be replaced with a - (hyphen).

PROVINCENO (*)

- The province/state must be a valid 2 digit code. For countries outside USA/Canada, enter a period and enter the complete province/state name in address 2 or 3.
- BC,AB,SK,MB,ON,QC,NB,NS,NL,PE

COUNTRYNO (*)

- The countrycode must be a 2 digit code for Canada/US. For countries outside USA/Canada, , enter a period and enter the complete country name in address 2 or 3.
- Options : US CA

LANGUAGE (*)

- Language that all documents will print for this customer.
- Options : 1 = English 2 = French

TAXCODE1,TAXCODE2 (*)

- The taxcode needs to setup properly based on customer location.
- GST,QST,HSTON, HSTNS, HSTBC, HSTNB, HSTNL, XMT for exempt
US customer = XMT,XMT Quebec = GST,QST
Ontario = HSTON,XMT Alberta = GST,XMT

CURRENCYNO (*)

- You will need to identify the correct currency code.
- Options : 0 = CAD 1 = USD

TERRITORYNO (*)

- If you want to eventually analyze sales by territory, you should enter a value in this column.
- If there is a value it first must be added in RSA under CUSTOMER RELATED – TERRITORIES.
- If left blank OR the value entered is NOT found in RSA, the DEFAULT customer value will be used.

GROUPNO (*)

- If you want to setup customer groups, example RETAIL, WHOLESALE, CHAIN.
- If there is a value it first must be added in RSA under CUSTOMER RELATED – CUSTOMER GROUPS.
- If left blank OR the value entered is NOT found in RSA, the DEFAULT customer value will be used.

SALESREPNO (*)

- If you want to setup customer sales rep. for this account.
- If there is a value it first must be added in RSA under CUSTOMER RELATED – SALES REPS.
- If left blank OR the value entered is NOT found in RSA, the DEFAULT customer value will be used.

TERMSNO (*)

- The customer's payment terms.
- If there is a value it first must be added in RSA under CUSTOMER RELATED – PAYMENT TERMS.
- If left blank OR the value entered is NOT found in RSA, the DEFAULT customer value will be used

PRICINGNO (*)

- The customer's pricing/discount level. EXAMPLE : You could setup your pricing in the product file as MSRP and then create additional dealer levels which would be discounted from the MSRP price
- If there is a value it first must be added in RSA under CUSTOMER RELATED –PRICING CALCULATION.
- If left blank OR the value entered is NOT found in RSA, the DEFAULT customer value will be used.
- Remove column in spreadsheet, if not required.

CREDITLIMIT

- Leave blank or enter a value
- A zero value, means there is unlimited credit.

NOTES

(*) Any fields not in spreadsheet, left blank OR the value entered is NOT found in RSA, RSA will use the values from the DEFAULT customer during the import process.

Prior to beginning the import process, please make sure that :

DEFAULT customer in RSA is properly configured

All records necessary records in the CUSTOMER RELATED tables have been added.

The order of the columns does not matter EXCEPT for customerno, which must be the first column.

You can re-import at anytime and RSA will automatically update all fields.