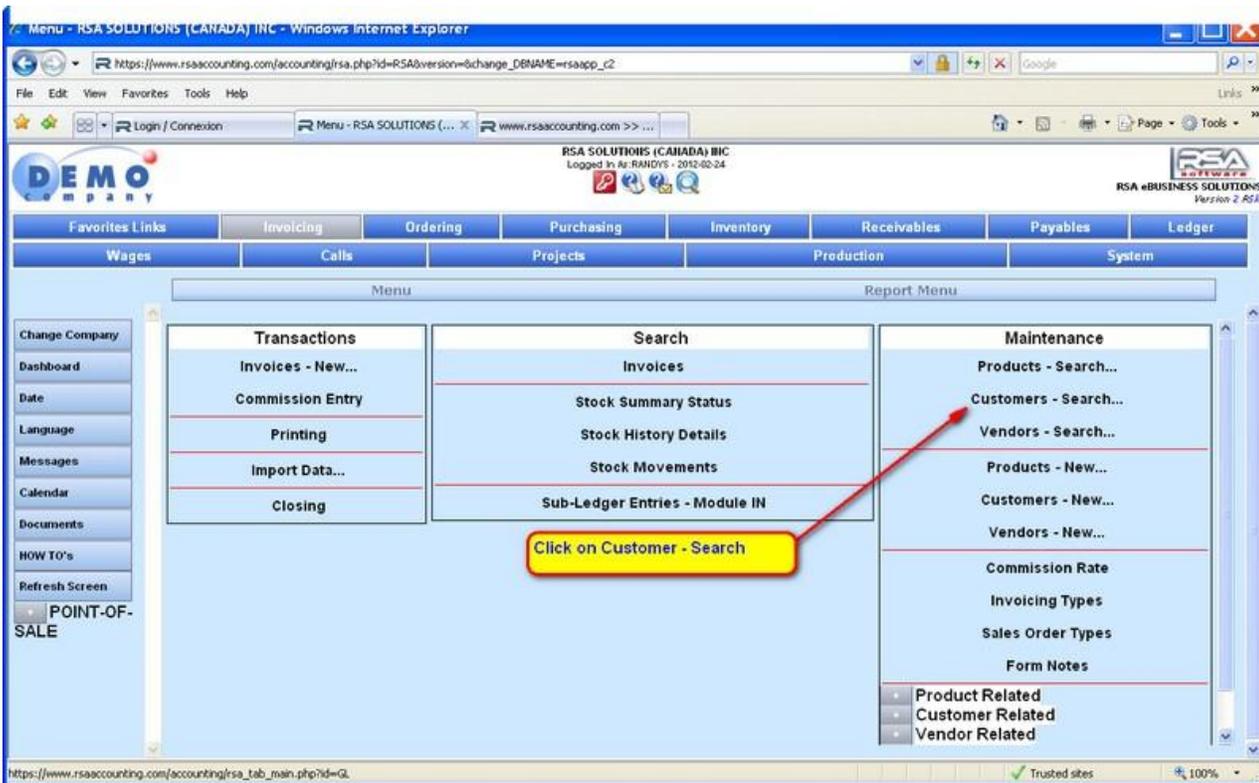


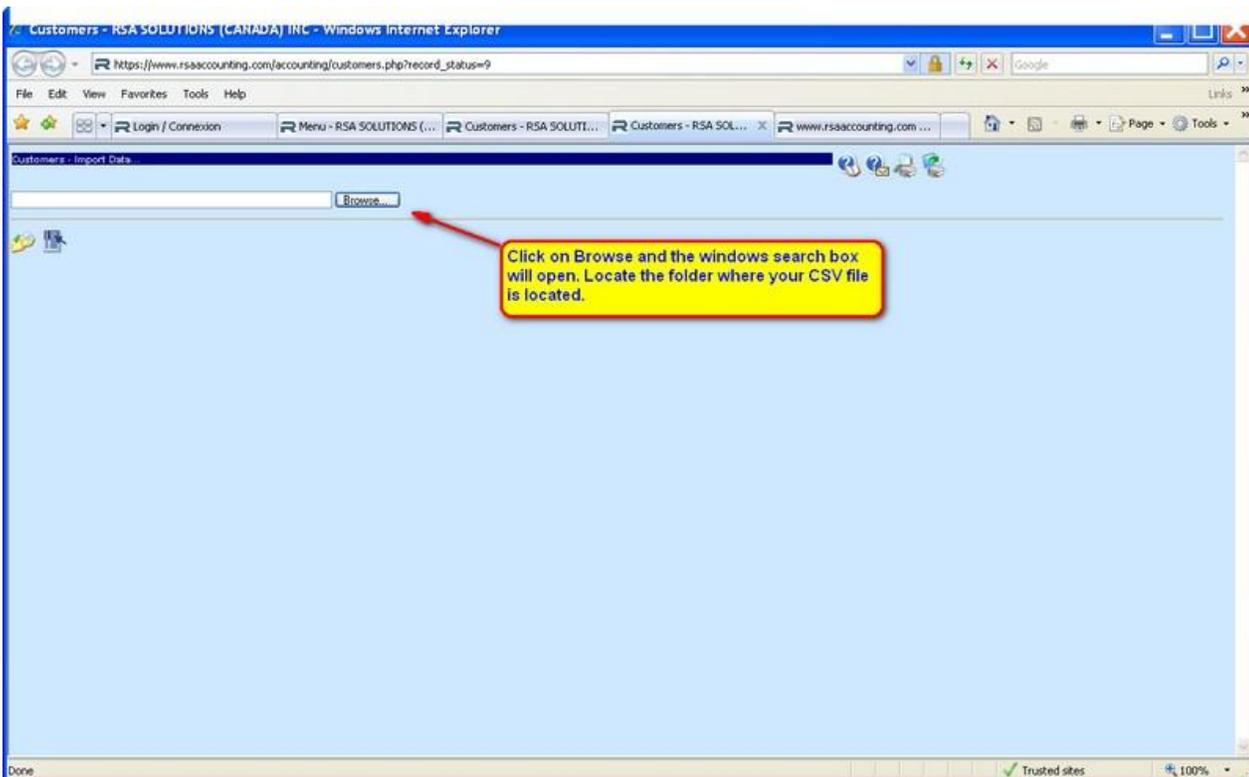
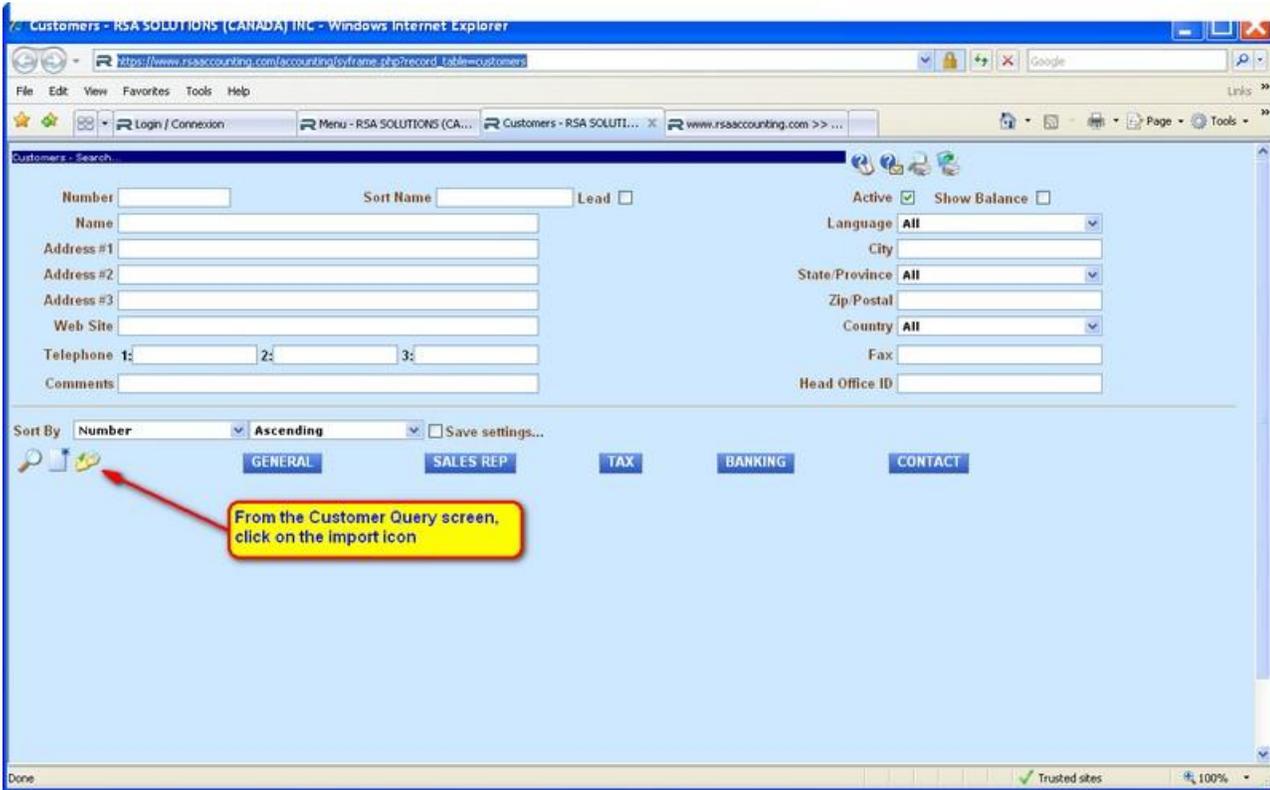
To import customers into RSA please download the RSA\_CUSTOMER\_IMPORT.csv

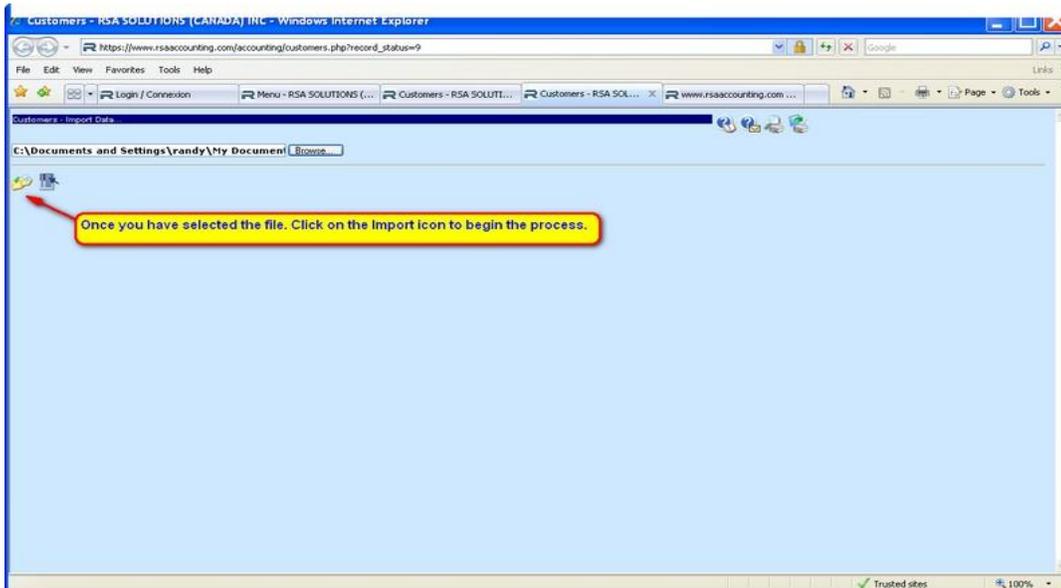
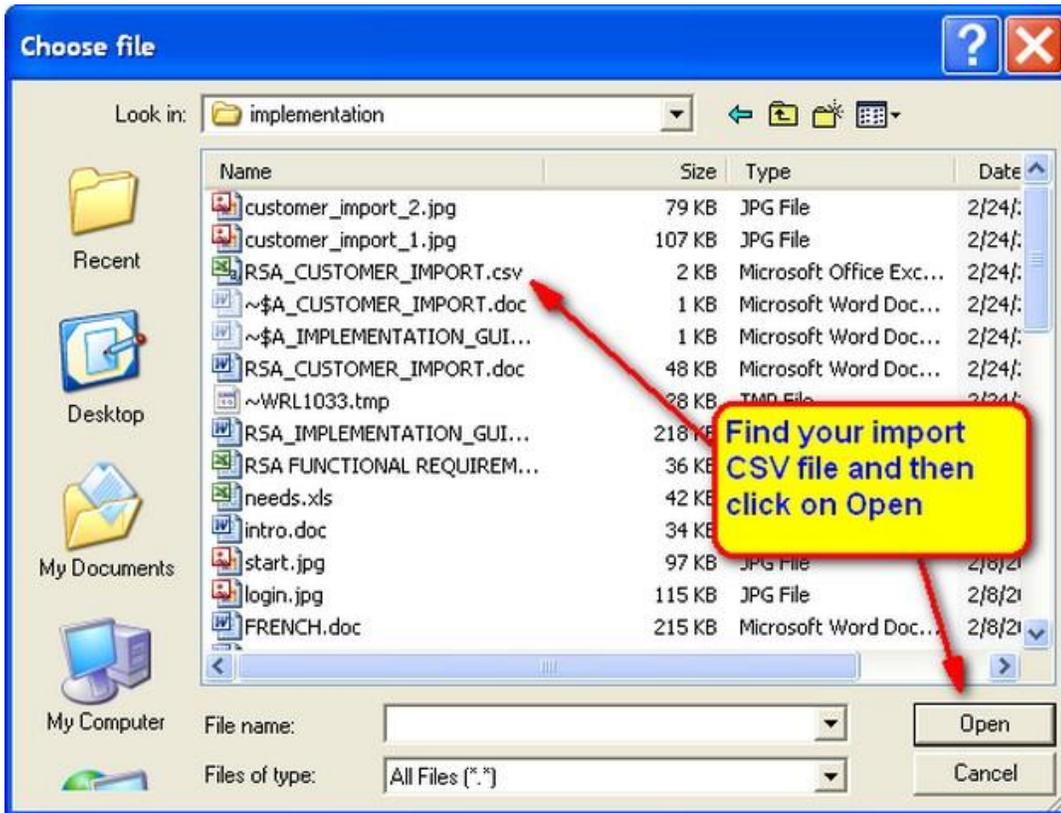
You can open the file in Excel.

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]





- 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.

#### CUSTOMER NAME & ADDRESS

The customer name and address is in the following columns

NAME, ADDRESS1, ADDRESS2, ADDRESS3, CITY, POSTAL, TEL1, TEL2, FAX

#### 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

#### CUSTOMER CONTACT

The contact information is in the following columns

CONTACT\_NAME,CONTACT\_EMAIL,CONTACT\_TEL1,CONTACT\_TEL2,CONTACT\_TEL3,CONTACT\_FAX

#### CONTACT\_LANGUAGE (\*)

- Options :       1 = English                       2 = French

#### 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 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 any time and RSA will automatically update all fields.