Protean Software

Customer Import

Customer / Site Import

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Protean Versions

This document describes the import functionality of customer records from Protean 7.4.4587 to Current Latest Release

Description

This import template is used to **create** & **update** customer and or site records.

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Fields on the Import - expected number of columns = 28:

Column	Field Name	Mandatory	Requirements	Notes
A	AccountCode	Always	Required Field If new or update, On customer record Max 8 Characters on Site record Max is over 50 but these will not be visible so our recommendation is 10 characters Must be different/unique. If the record is a site (Suggest 01, 02 etc and end of main Acc number, see InvAccountCode)	If record already exists will update the record if not creates new unless otherwise indicated by column B.
B	AddRecord	Always	Required Field Y or N	**Y** Will include this record and create / update on Protean. **N** Will not include this record so will not create / update on Protean.
C	Status	No	Type Active Prospect or Closed (If blank system will choose Prospect)	Not mandatory but will denote customer status
D	Name	No	Text Field – 255 Characters Max	Enter customer name as text or Site name if importing sites
E	AddressLine1	No	Text Field – 255 Characters Max	Enter Address Line 1 of either the invoice address (Customer) or site address (Site)
F	AddressLine2	No	Text Field – 255 Characters Max	Enter Address Line 2 of either the invoice address (Customer) or site address (Site)
G	AddressLine3	No	Text Field – 255 Characters Max	Enter **Town or City** of either the invoice address (Customer) or site address (Site)
H	AddressLine4	No	Text Field – 255 Characters Max	Enter **County** of either the invoice address (Customer) or site address (Site)

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I	Postcode	No	Text Field – 10 Characters Max	Enter Postcode of either the invoice address (Customer) or site address (Site)
J	TelephoneNumber	No	Numeric Field	Enter Phone Number of Customer or Site record
K	FaxNumber	No	Numeric Field	Enter Fax Number (If relevant)
L	EmailAddress	No	Text Field - 50 Characters Max	This is a site or customer email address on the front page of a customer record and not a contact email
M	WebAddress	No	Text Field – 50 Characters Max	Website address of customer if you wish to record this
N	VatRegNo	No	Text Field – 50 Characters Max	Customers VAT registration number
O	TaxCode	No	Text Field – 50 Characters Max	Tax code that applies to the customer. Must match the names of your VAT rates in Protean (>System>Accounts>VAT Rates) e.g standard or exempt
P	InvoiceTerms (DueDate)	No	1 = Inv Date, 2 = As Settle Days 1 after Inv Date, 3 = As Settle Days 2 after Inv Date, 4 = Due end of next month or 5 = End of Month plus Settle Days 1	If nothing entered, default General Settings will be assumed
Q	SettleDays1	No	Numeric Field	If nothing entered, 30 will be assumed
R	SettleDays2	No	Numeric Field	If nothing entered, 0 will be assumed
S	CreditFlag	No	Code field On Credit Hold 0 = No -1 = Yes	If nothing entered 0 will be assumed
T	CreditLimit	No	Numeric Field	If nothing entered 0 will be assumed
U	AccountBalance	No	Numeric Field	If nothing entered 0 will be assumed

V	Currency	No	Text Field Currency Code in Protean (>System>Accounts>Currency)	If nothing entered, your base currency will be used. E.g GBP
W	InvAccountCode	No	Text Field 8 Characters Max (Only use if site record) (Always use for a site record)	This is **ONLY** relevant if you are importing a site record, this should be the account alpha code (that exists in Protean) of the customer that the site relates to. Must be left blank if the record is an invoicing address but must be **filled in** if the record is a **site**.
X	Contact Title	No	Default list of titles pre-defined in Protean	Needs to exist in Protean as a contact title, such as Mr Dr Mrs Miss etc. Only use if you want to add a contact to the customer or site record, will add as an equipment contact on the record
Y	ContactFirstName	No	Text Field 50 characters max	Contact (Equipment) first name
Z	ContactLastName	No	Text Field 50 characters max	Contact (Equipment) last name
AA	ContactJobTitle	No	Definable list in Protean >System>CRM>Job Titles	Needs to exist in Protean as a contact job title, >System>CRM>Job Titles
AB	SiteNotes	No	Text Field	Will populate site notes on a customer or site record
AC	Longitude	No	Text Field	Mainly left blank as the postcode will resolve the field using show on map function inside the system
AD	Latitude	No	Text Field	Mainly left blank as the postcode will resolve the field using show on map function inside the system

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AE	ExternalSiteRef	No	Text Field	Must be a unique external site ref, used if you know the site by a different code i.e. old system code or other. **Note** – If an external Site Ref exists in any other record in Protean this record will **not** get created / updated. Only use if **unique**.
AF	PriceListName	Yes	Text field links to a price list that has already been set up in Protean	Links to a price list that has already been set up in Protean such as Default**.** System > Price Lists. **NOTE** If this field is missing the import will show errors from other fields**.**
AG	InvEmailAddress	No	Text Field	Must be a valid email address
AH	Depot	Yes	Text Field	Must be a depot that exists in Protean

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How to import

1. File must be saved in CSV format.
   a. File must not contain any header rows.
2. Navigate to file tab on Protean
3. Select Import Data
4. Use the import wizard
5. Select 'Customers' under the type of data dropdown
6. Find the CVS import file (as per step 1)
7. Hit Next to validate the data
   a. If needed correct import file
8. If step (7) successful - Double check the data on screen
9. Hit next to import into Protean
   a. If needed review any warning messages and either correct in Protean / Import file and revert to step (2) onwards
10. If successful choose to keep or delete the import file used

Best Practice

- If using Excel – do not double click to open a CSV File.
- Open Excel and use a data import from text to open any CSV
  - Select text formatting for any data including leading zeros
- Once ready, save in CSV format – including the header rows
- Review the saved CSV file in raw text format
- Remove the header row from the raw text CSV - save as another name with .csv formatting
- Run any major import in a practice environment before live
- Carry out a sample import of under 10 records before any larger import

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Other Info

This import is available in XML format.

Regular scheduling of this import is possible via the Protean scheduler.

Further Assistance

Example CSV template available on support website

Please review import templates webinar - https://support.proteansoftware.co.uk/knowledge-base/webinar-import-templates/

Contact Protean Support

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Version Control

Version	Comments	User	Date	Approver
1.0	Original Document	Glen Barber	08/02/2019	MH
1.2	Updated to include depot & price list fields	Matt Hayden	26/10/2021	MH