Customer Batch Uploader

Use this page to download a formatted Excel spreadsheet for batch uploading customers to the database.

The customer import runs as a background job. It supports Excel files with multiple sheets. The records are processed in groups of 50 records at a time to help keep the memory usage low.

The import page shows a job progress bar and messages. When the job is complete, there is an Excel file provided for download and saved in the Attachments area for later reference. This Excel file shows the details about the number of customers, site, systems, RMR saved during each 50-record import. If any validation errors occur during the import process, the results file will show the details.

1. Click Download Template.
2. Open the downloaded Excel spreadsheet.
3. Save the spreadsheet as a new name.
4. Read the information on the Legend worksheet.
5. Review samples on the Example Data worksheet.
6. Add data to upload to the Format Layout worksheet. Column headings with red text are required.
7. Delete the Legend worksheet.
8. Delete the Example Data worksheet.
9. Save the spreadsheet.
10. On the Customer Batch Uploader page, click Select File.
11. Browse to the spreadsheet and click Open.
12. Verify the correct spreadsheet has been selected.
13. On the Customer Batch Uploader page, click Upload.
14. At the Please Confirm message, click Yes.