InventoryCloud importing with Shipping and Billing addresses

Russ Hart - 2023-08-08 - InventoryCloud

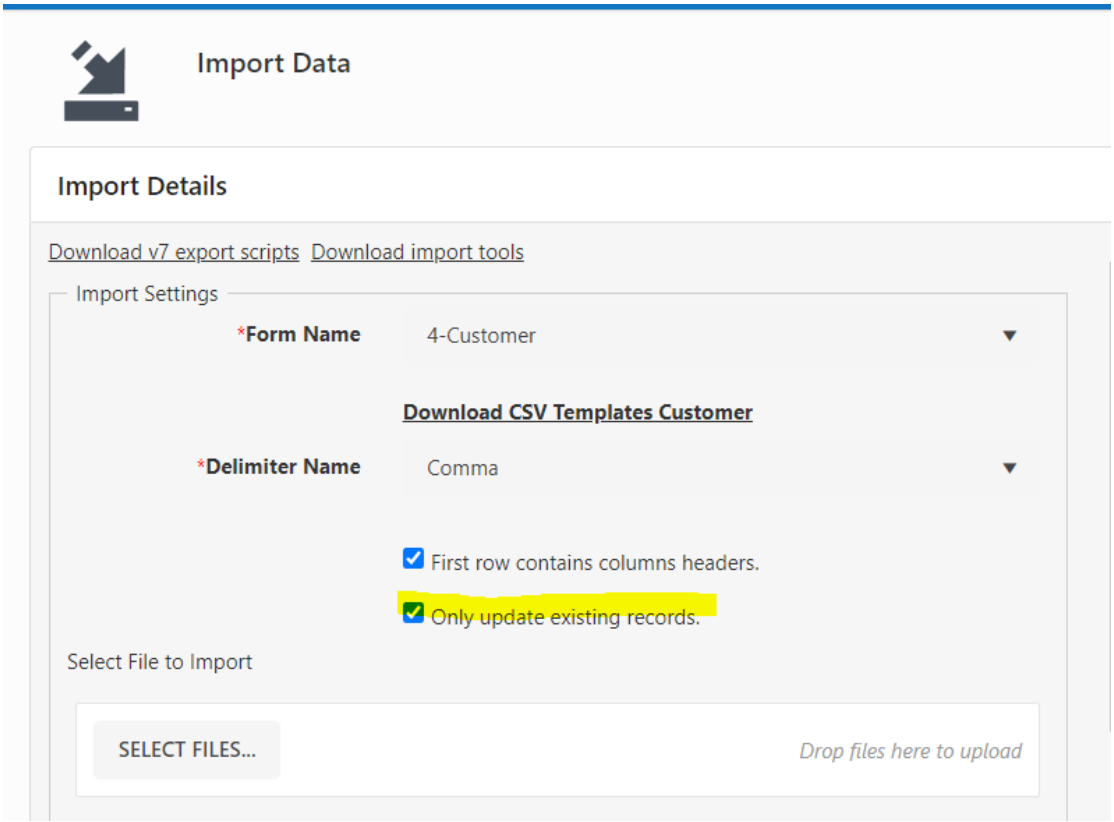
When Importing customers into InventoryCloud, the import sheet only has the ability to add one address per row of the file, and it defaults to Customer Billing if nothing is designated in the Address Type column.

If you need to add both addresses, you will need to copy the customer information to a second row. In the Address Type column, use the values "Billing" or "Shipping" to designate which address is which:

4 Customer.csv

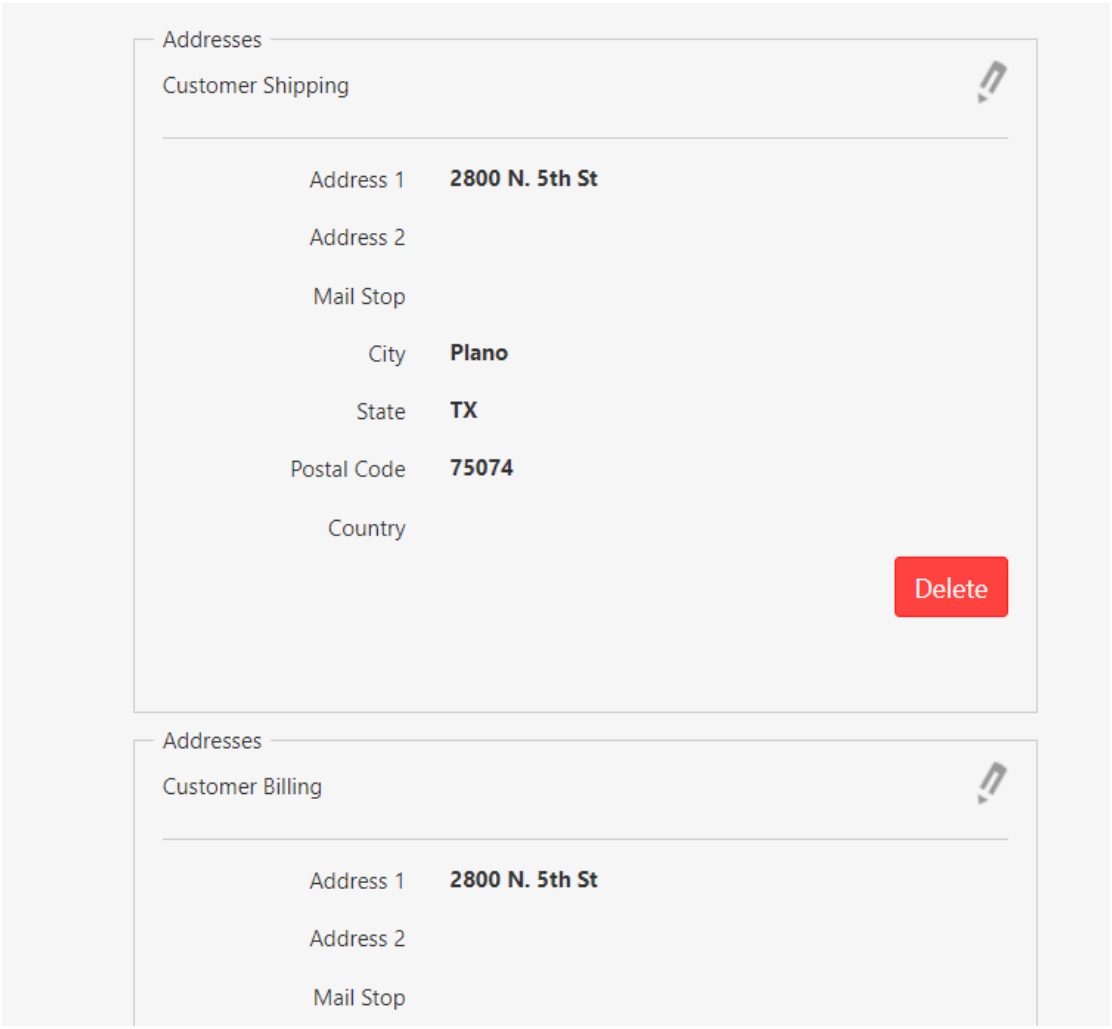
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Customer Number	First Name	Last Name	Company Name	Department	Contact Email	Contact Phone	Cont	Cont	Busi	Busi	Busir	Bus	Cont	Address Type	Addre
2	T0001	John	Doe	My Company	IT	email@email.com									Shipping	1400 1
3	T0001	John	Doe	My Company	IT	email@email.com									Billing	1400 1
4	T0002	John	Doe	My Company	IT	myemai@email.com									Shipping	1402 1
5	T0002	John	Doe	My Company	IT	myemai@email.com									Billing	1402 1
6	T003	Jane	Doe	Your Company	HR	youremail@email.com									Shipping	2800 N
7	T003	Jane	Doe	Your Company	HR	youremail@email.com									Billing	2800 N
8																

When importing, after selecting Form Name 4 Customer, add a check to the 'Only update existing records.' box:



If this box is not checked it will give an error that the customer number already exists.

Once the import has been completed you should see both address when you View/Edit the customer


Addresses
Customer Shipping
Address 1
2800 N. 5th St
Address 2
Mail Stop
City
Plano
State
TX
Postal Code
75074
Country
Delete
Addresses
Customer Billing
Address 1
2800 N. 5th St
Address 2
Mail Stop

- Tags
- Cloud