

Contents

- 01 Import Tools
- 02 Importing Products
- 03 Importing Customer Contacts

Import Tools

As you transition from your previous system to LightSpeed, Import Tools provides you a simple way to import or update data into LightSpeed in a batch, whether it's **Products**, **Suppliers**, **Customers**, or **Customer Contacts**.

To begin, you must click the *Open File* button to locate the file containing your original data on your hard drive. This file must be a text, tab-delimited file, and each line item represents a different record. This format can be saved from Microsoft Excel, or Text Wrangler. It is recommended that you include the column headings in your file as they can be omitted when you do the import, but are useful for matching fields.

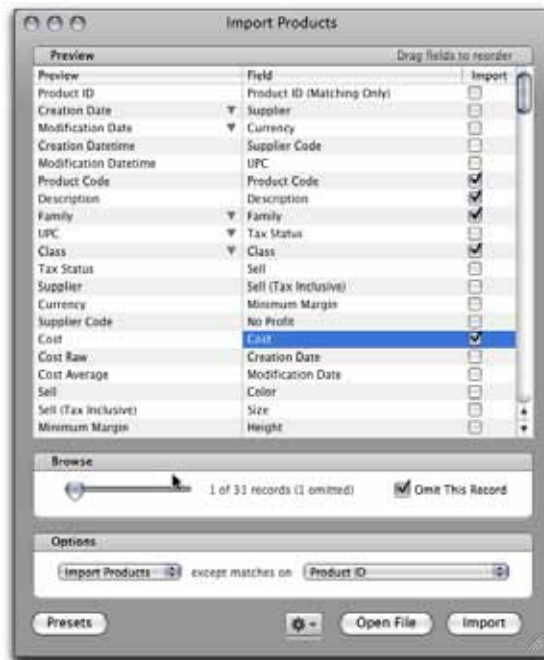
Using a 2-column layout, you match target fields (in the second column) with your original data (in the first) by dragging and dropping them into the proper order. If you do not want to import data into a particular field, deselect its checkbox.

If there is an arrow in the first column, it is an indication that this field currently has a pre-defined set of data set up in LightSpeed. Any data being imported into one of these fields must match exactly a corresponding entry in this field's pre-defined value list. For example, if you have "speakers" in your original data and you want to import it into LightSpeed's "Class", the word "speakers" must already be in LightSpeed's list of *Classes*. If you click the detail arrow, you can choose one of the pre-defined values to have that auto-added into all the records you import.

You can skim through your original data to ensure it will be imported the way you expect using the Browse slider. If there are any records you wish to omit from the import, use the Omit This Record checkbox when you are browsing the record you want to omit.



Import Tools



Import Products window

The *Presets* button allows you to save a particular configuration of field matches so you do not have to manually re-match the same field order for your next import.

Importing Products

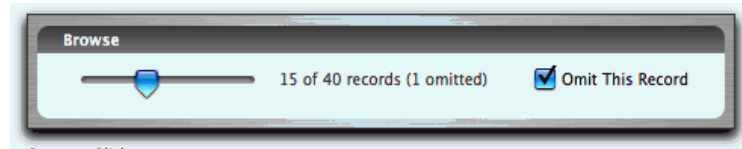
Products can be imported from a text file that your supplier provides you, and can be used to save time in the creation or maintenance of Products. Each line item in the original data will represent one record in LightSpeed. When importing new Products, LightSpeed will create a new Product card for each line item you import.

When importing Products, you have the option to skip records that match on particular fields. For example, choosing *except matches on Product Code* will skip any records that have a Product Code identical to one already in the system. This means that if your original data matches a Product Code with the existing Products in LightSpeed, that record will be skipped. It also means that if the Product Codes in your original data are not unique, only the first line item will create a new Product. You can also select matches on both Product Code and several other fields in the case that different manufacturers or distributors use the same code.

Images

Rather than manually dragging jpg images to the photo drawer of every Product card after the Products have been imported, you may incorporate these jpg images into your original data using their file names, and adding a column to your original data that includes this file name, resulting in a batch import of your Product images.

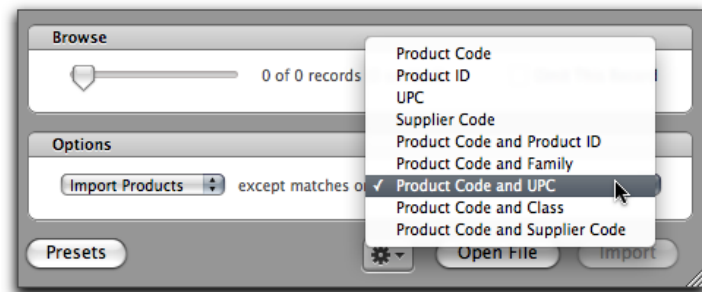
First, collect **all** the images you wish to import into **one** folder saved to your hard drive. Each image must either be in .jpg or .png format. Next, enter the name of each Product's image file, including the file type, in its own column in the original data file. Save the data file as a tab-separated text file and use the same procedure for setting up the import as outlined above. Match the column that contains the names of your image files to the *Photo* field in column 2 of the *Import Products* window. Click *Import*. You must then indicate the folder that contains all of your image files, and click *Select*.



Browse Slider



Product Code is a required field in LightSpeed, and with few exceptions, should be a **unique** value. You must have a column for Product Codes when you import Products.



Import Options for Products

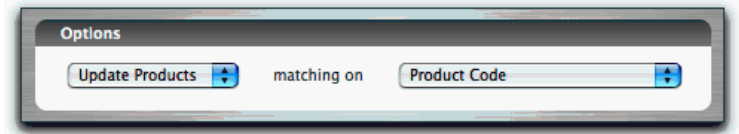
EX:

If you have an electronic copy of your supplier's price list of Products that are already in LightSpeed, but for which you want to update the Costs, you can choose to *Update Products* matching on *Product Code*. For example, if a Product had two Suppliers, you could use the *Update Costs* option to modify the Cost of the non-default Supplier, and leave the default Cost unchanged.

Updating

You are also able to update your existing records using the *Update Products* option, allowing you to change information in LightSpeed without having to delete and re-enter your Products.

The *Update Costs* option will allow you to modify non-default Costs.



Update Options for Products

Importing Customers

As with Products, Customers may be imported or updated. The guidelines are the same, including the requirement that any data imported into a "pre-defined" field indicated by a downward-pointed arrow **must already exist** in LightSpeed exactly as it appears in the original data. For example, if your original data contains an Account Status of "Waiting", this must be added to the list of Account Statuses in LightSpeed prior to importing.

Using this method, it is important to indicate which type of phone number you're importing using the detail arrow. In this case, you would likely choose which type you want imported for each record from the pre-defined list that pops up. However, LightSpeed can accommodate different types of phone number - Work, Home, Fax, etc - provided that the original data matches exactly the types of phone numbers possible in LightSpeed.



When updating Products matching on Product Code or Product Code plus another field, you must select the checkboxes for the fields you're updating as well as the fields you're matching on. In the example above, you would make sure both the *Product Code* and the *Cost* checkboxes are selected.

Importing Customer Contacts

Customer ID	Company	Contact
DON	Donaldson and Sons	
MIL	Miller Construction	Jamie Millier
MIL	Miller Construction	Donna Miller
MIL	Miller Construction	Randy Miller

LightSpeed will also allow you to import contacts within a given Customer, including alternate billing or shipping addresses, Customer Groups, and more. To create a Contact within a Customer, the Customer **must first exist** in LightSpeed. The essential step for importing contacts is outlined above - the importing of a unique value for the field "Customer ID (Imported)"; when importing your Customers the first time.

Having imported this unique value to "Customer ID (Imported)", you can then match this same value (whether it is a number, or a duplication of the company name column) from the original Customer

Contacts data to the target data field - *Customer Contact (Imported)* - in LightSpeed. Individual contacts will then be created within the Customer profile.

For instance, if you had a spreadsheet of two of your LightSpeed customers, one that had no Customer Contacts, and one that had three Customer Contacts, your spreadsheet would appear like this:

When importing Contacts, match the Customer ID in the data above with the *Customer ID (Imported)* field. Note: If the original data does not have a Customer ID, you may duplicate the company name column, and match this with *Customer ID (Imported)*.



If you are going to be importing Customer Contacts for your Customers, your original data must include a value for the field "Customer ID (Imported)". This value may be a number, or it could also be a duplication of the company name - as long as it is a unique value according to the main Customer.