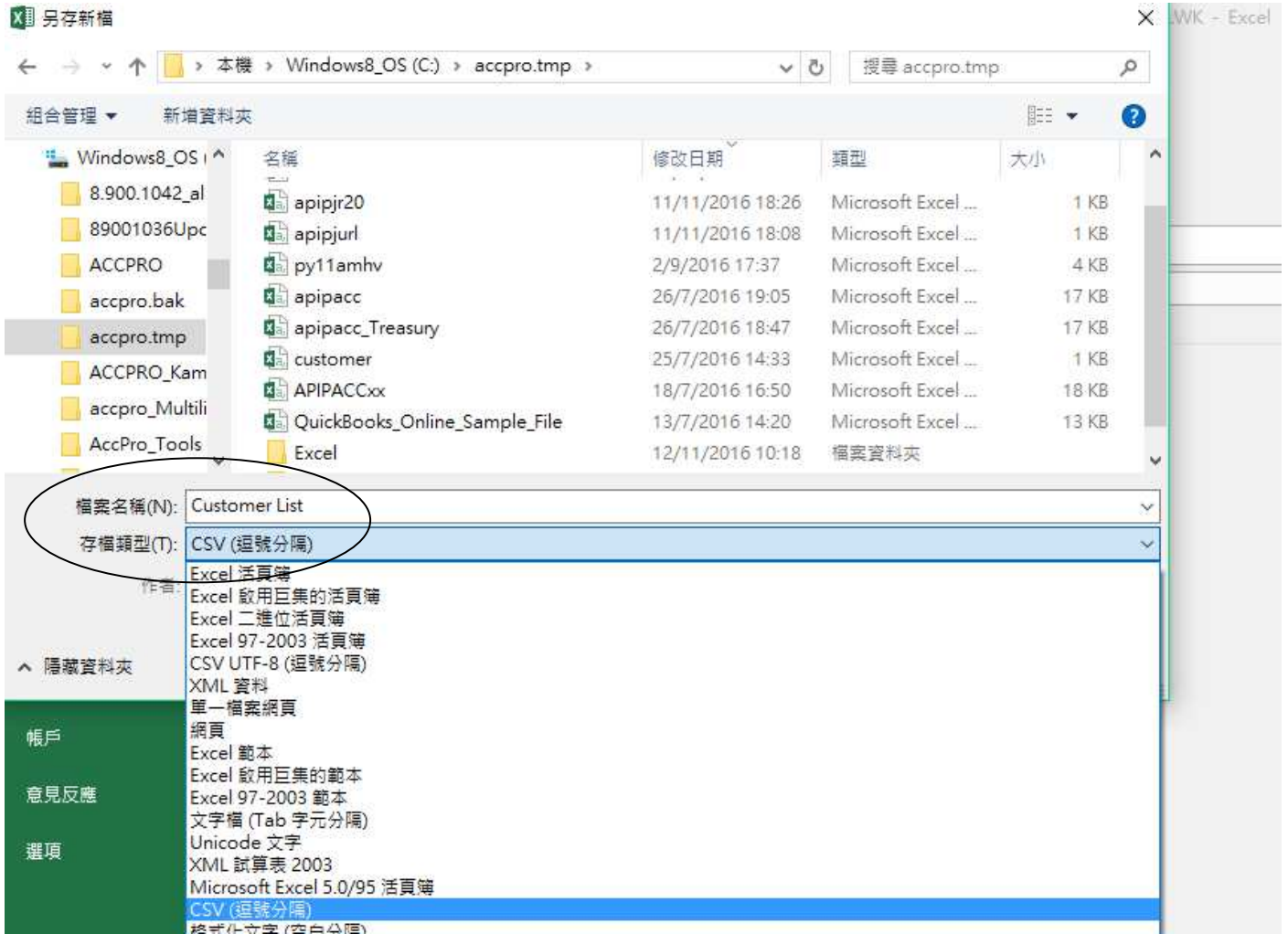


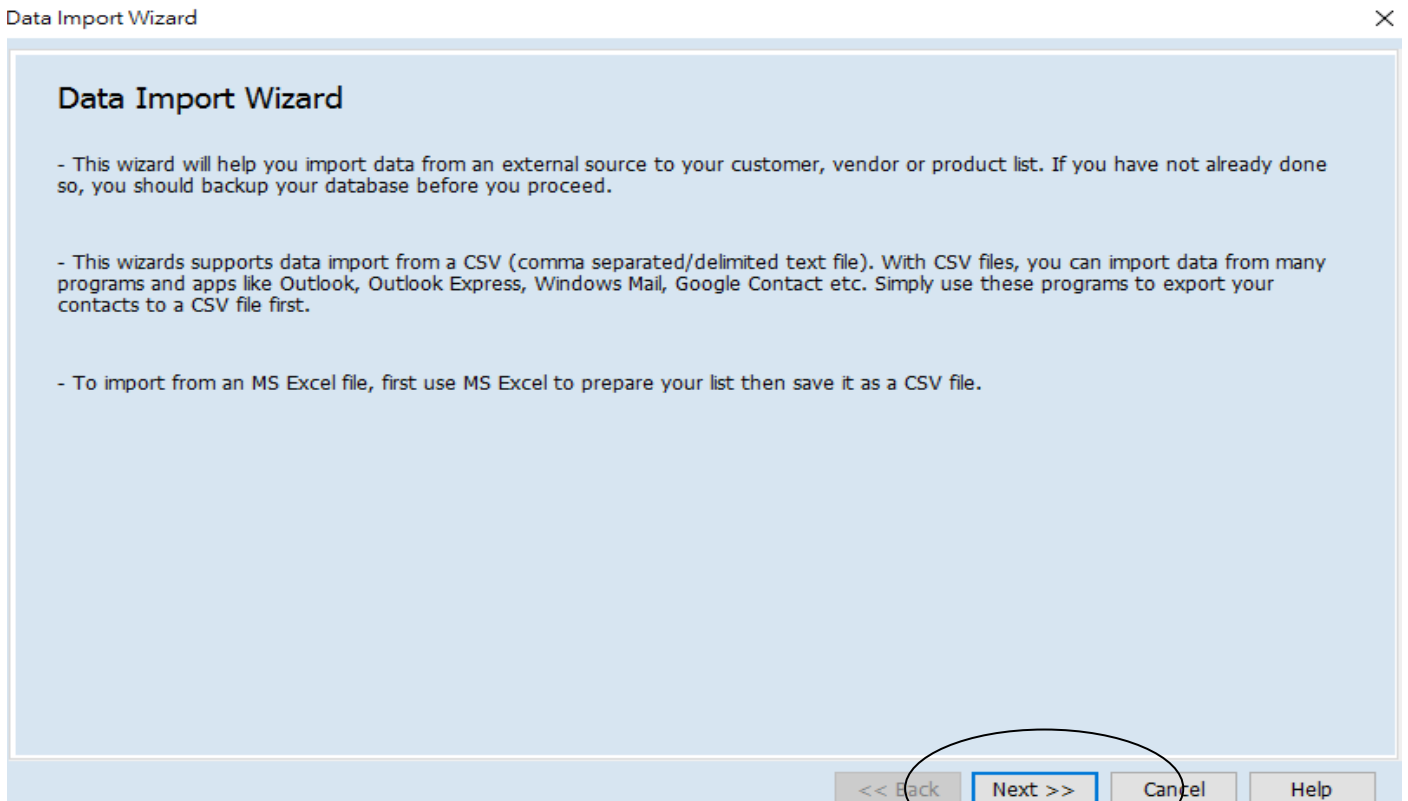
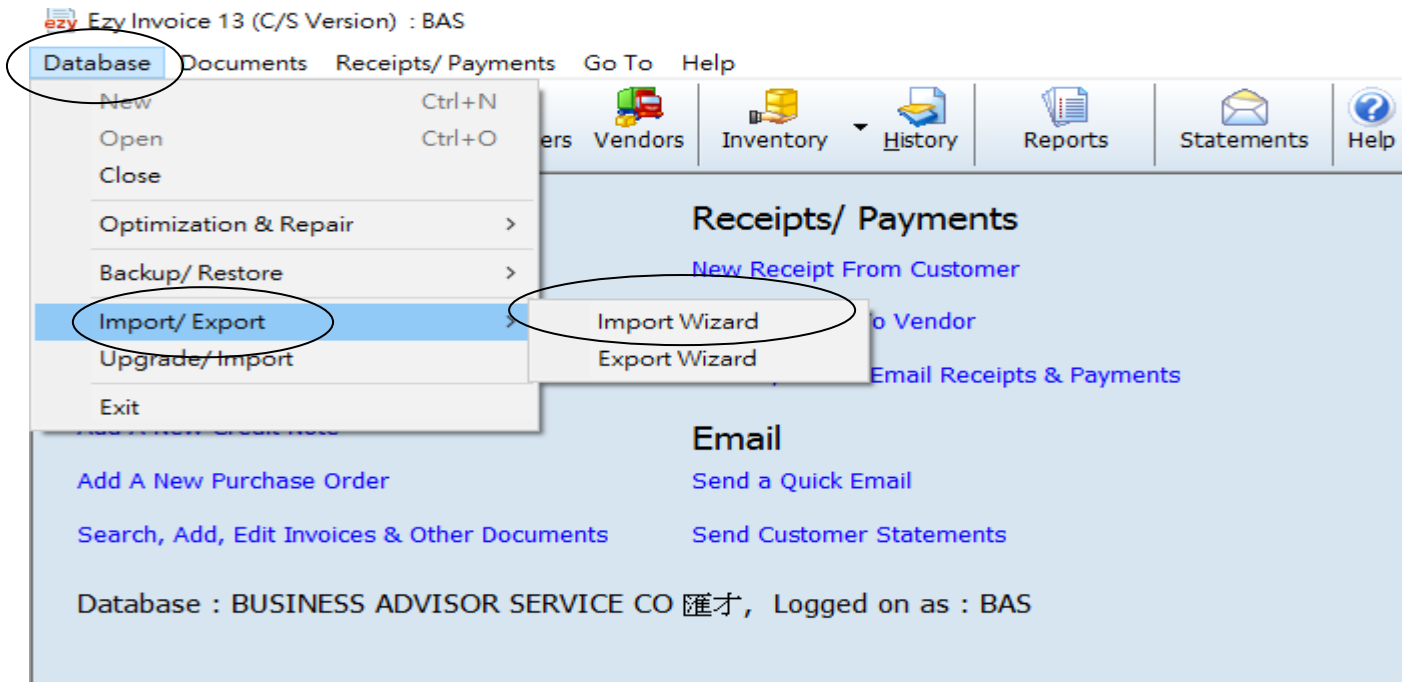
How to import Customer List from Excel file

1) Prepare Excel file in CSV format

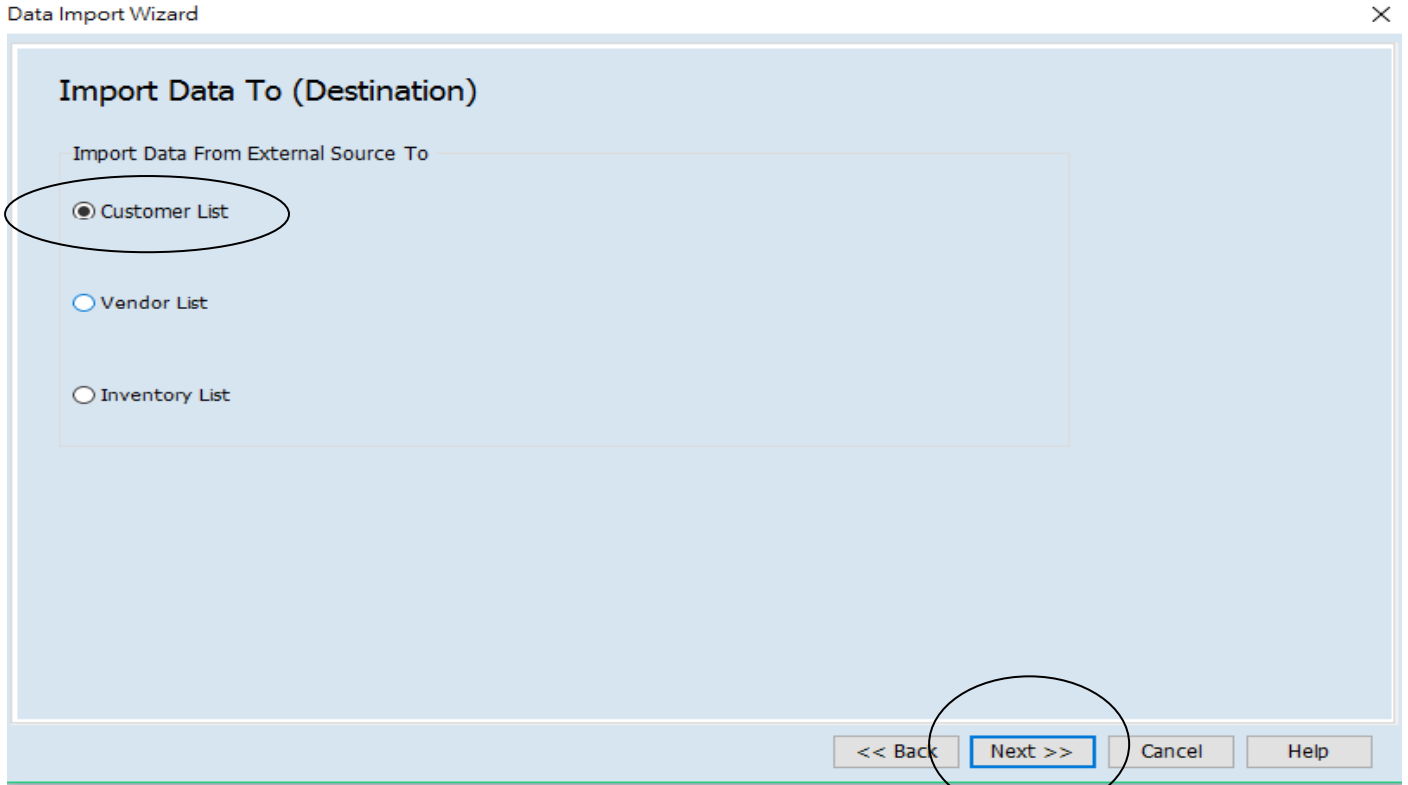


EZY Invoice 13

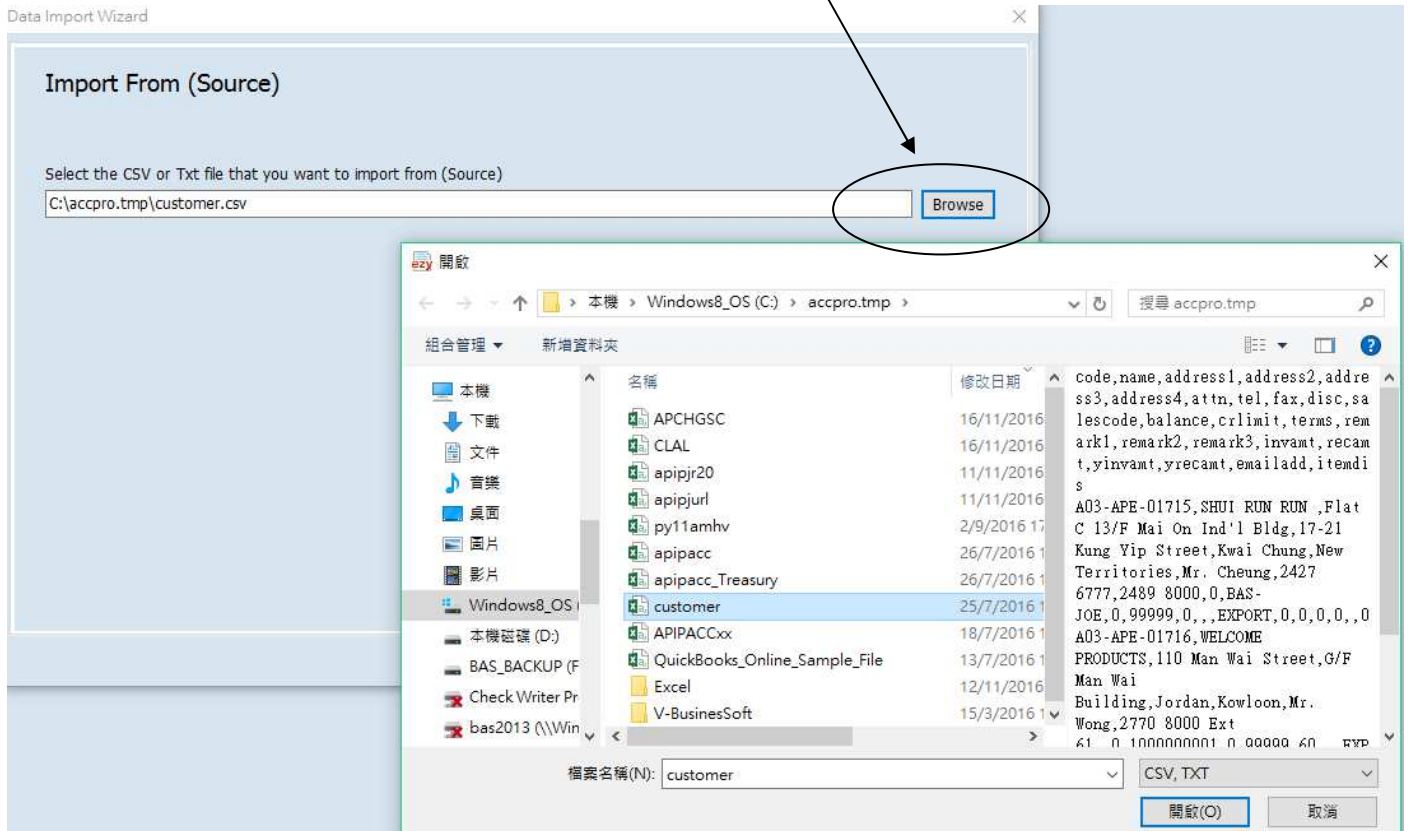
2) Log-in to EZY Invoice 13, goto Database > Import/Export > Import Wizard



EZY Invoice 13



Select Excel file from your workstation



EZY Invoice 13

Data Import Wizard

✕

Field & Record Separators

Source File Type

Comma Separated (CSV) Tab Delimited Custom

Field or Column Separator

Comma (,)
 Tab
 Semicolon (;)
 Space
 None
 Others

Record or Row Separator

Separator
Text Qualifier

<< Back

Next >>

Cancel

Help

Data Import Wizard

✕

Source Data Preview & Mapping (Only first 30 records are shown)

1. Check that the data columns and rows are separated correctly. Otherwise click [back] and correct the settings
2. If data is properly separated, click the column headings one at a time and map it with the destination fields

Field1	Field2	Field3	Field4
code	name	address1	address2
A03-APE-01715	SHUI RUN RUN	Flat C 13/F Mai On Ind'l Bldg	17-21 Kun
A03-APE-01716	WELCOME PRODUCTS	110 Man Wai Street	G/F Man V

Row 1 is the column header in the source. Start import from Row 2 to exclude the column headers

<< Back

Next >>

Cancel

Help

EZY Invoice 13

Mouse point to Field 3, sub menu pop out, select “Street Address” (in this example)

Source Data Preview & Mapping (Only first 30 records are shown)

1. Check that the data columns and rows are separated correctly. Otherwise click [back] and correct the settings

2. If data is properly separated, click the column headings one at a time and map it with the destination fields

Field1	Business Name	Field3
code	name	address1
A03-APE-01715	SHUI RUN RUN	Flat C 13/F Mai On Ind'l Bldg
A03-APE-01716	WELCOME PRODUCTS	110 Man Wai Street

Row 1 is the column header in the source. Start import from Row 2 to exclude the column headers

<< Back Next >>

After mapping all the column, tick “Row 1 is the column header in the source...” if necessary

Source Data Preview & Mapping (Only first 30 records are shown)

1. Check that the data columns and rows are separated correctly. Otherwise click [back] and correct the settings

2. If data is properly separated, click the column headings one at a time and map it with the destination fields

Country/ Region	Contact Name	Tel	Fax
address4	attn	tel	fax
New Territories	Mr. Cheung	2427 6777	2489 8000
Kowloon	Mr. Wong	2770 8000 Ext 61	

Row 1 is the column header in the source. Start import from Row 2 to exclude the column headers


<< Back Next >> Cancel Help

Data Import Wizard

Import Mode

Select Import Mode

- 1. Append : Just add records from the source to the destination
- 2. Update: Update records in the destination when a match is found for the key field
- 3. Update & Append : If a matching record is found in the destination (based on key field) update it. Otherwise add as new record
- 4. Append New Only : Add records only when a match is not found in the destination based on the key field



TIP : Select Option 1 if your destination table is empty or you are certain that none of the records in the source exist in your destination. If your destination already contains data and some of the records in the source may already exist in the destination, you should consider option 2 - 4 to avoid duplicate records in your destination after the import.

<< Back **Next >>** Cancel Help

Please check, if correct, press “Next”, if incorrect, press “Back”

Data Import Wizard

Ready Import

Review your settings and click [Next >>] to start the import process

Destination : Customer List

Field Mappings : DESTINATION => SOURCE
Business Name => Field2
Street Address => Field3
Contact Name => Field7
Tel => Field8
Fax => Field9

Total Fields To Import : 5
Start Import At Row : 2
Import Mode : Append

<< Back **Next >>** Cancel Help

EZY Invoice 13

Data Import Wizard



Ready Import

Review your settings and click [Next >>] to start the import process

Destination : Customer List

Field Mappings : DESTINATION => SOURCE
Business Name => Field2
Street Address => Field3
Contact Name
Tel => Field8
Fax => Field9

Total Fields To Import : 5
Start Import At Row : 2
Import Mode : Append

Confirm

Start the import operation ?

<< Back Cancel Help

Data Import Wizard



Import Done. Review Data



IMPORTANT : Check that the imported data has been mapped and merged with your existing data correctly. If correct, click [Finish] to save the imported data. Otherwise click [<< Back] to undo the import and make changes

Import Summary : Total Records In Source : 6, Records Added : 6, Records Updated : 0, Errors : 0

Name	Address	Contact Name	Ema
	(Memo)		
	(Memo)		
	(Memo)		
	(Memo)		
Chong Hing Holdings	(Memo)		
Poss Trading International Ltd	(Memo)		
SHUI RUN RUN	(Memo)	Mr. Cheung	
WELCOME PRODUCTS	(Memo)	Mr. Wong	

Total Records After Import : 8

Tip : Double click the Memo fields to view its content

<< Back Cancel Help