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RFMS, Inc.

# **Customer Import/Export User Guide**

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# RFMS Customer Export / Import

The RFMS Customer Export / Import program allows the data in the RFMS Customer file to be exported and imported to and from a generic text file. This program is designed to assist RFMS users who have external customer databases and want to add those customers into their RFMS Customer file. Additionally, the export/import function can be used to transfer customer records to and from other store locations.

## Downloading and Installing the Software

Make sure all Windows programs have been closed before starting this installation.

1. Download and run the Customer Import & Export installation program. This will be available on the RFMS software downloads page. If you have any trouble finding the software, please contact RFMS support.

The screenshot shows the RFMS Customer Portal website. At the top, there is a red header with the RFMS logo and the tagline "Systems for Success". To the right of the logo, there are links for "My Account", "Support", and "1-800-701-7367". Below the header is a black navigation bar with links for "HOME", "PRODUCTS", "INDUSTRIES", "TRAINING", "SUPPORT", "NEWS", and "COMPANY".

The main content area features a "RFMS CUSTOMER PORTAL" heading and a "WELCOME!" message. Below the welcome message, there is a "RFMS INTERNAL USE" label and a "Logout" button. A search bar is located in the top right corner of the main content area.

Below the navigation bar, there are four buttons: "Request Access Code", "Current Version", "Reset Password", and "Upload File".

The page displays the "RFMS VERSION 15.1.2.14567" and the "RELEASE DATE 9/14/2015".

Under the "RFMS CORE" section, there is a link for "RFMS Core Program Suite For Sql".

The "CUSTOMER EXPORTER" section lists "Customer Exporter" and "Customer Import & Export" with links to "CustomerImportExport.exe" and "CustImpEx10.pdf".

1. Click Next to begin the installation Process

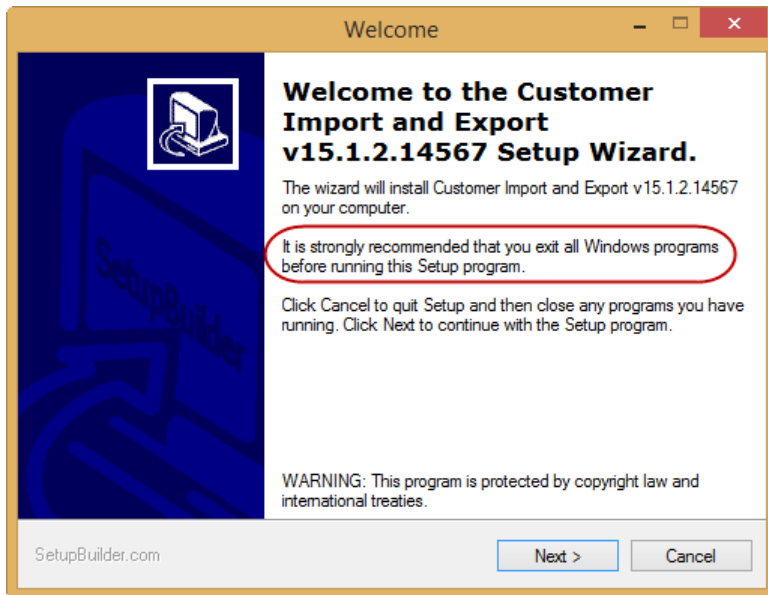


Figure: Welcome to Installation

2. Select your RFMS directory as the destination of the install.

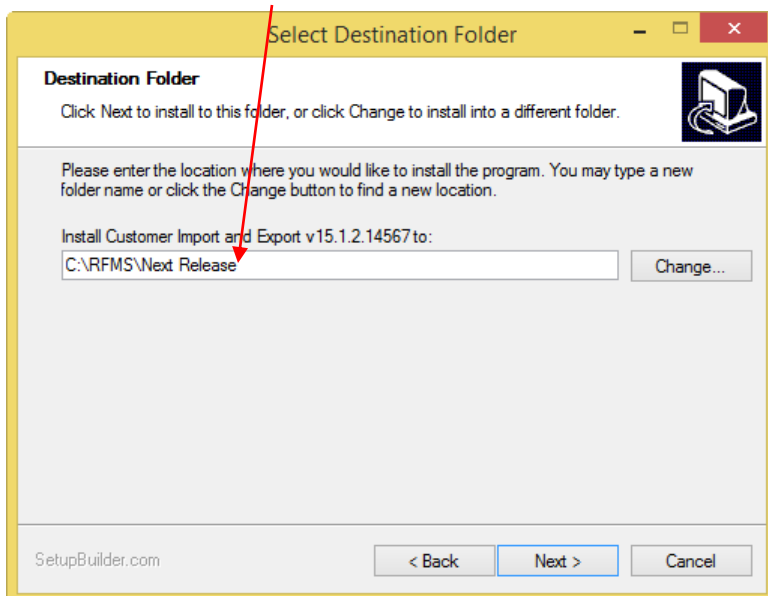


Figure: Destination Folder

If not sure where this is, go to the RFMS desktop icon and right click. The path listed as "Start in", is the RFMS Directory.

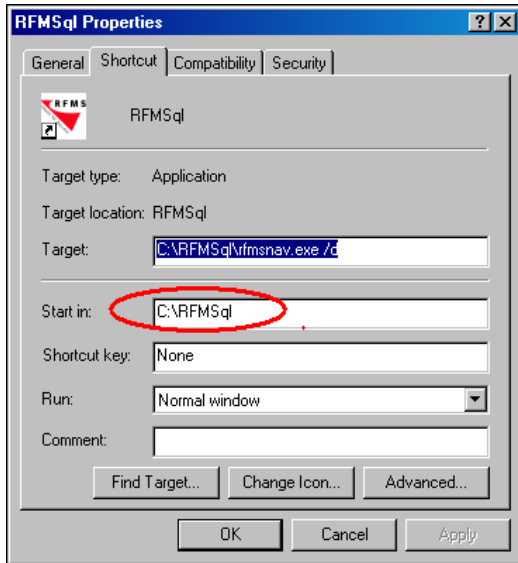


Figure 1 RFMS Properties

Be sure to install the program(s) on each workstation or server that needs to have access. A screen will display to allow review of this setting. Click **next** here.

The program will go through a progress bar as it installs. When the Setup Wizard Complete Screen displays; click the **Finish** Button.

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## Starting the Program

After the Customer Export/Import file has been installed on, start the program by:

Opening the RFMS directory and finding the Customer Import Export.exe file. Double-click on this file to open the Customer Import Export application.

**OR**

Create an icon and place it on the desktop. Double-click on the icon to open the Customer Import Export routine.

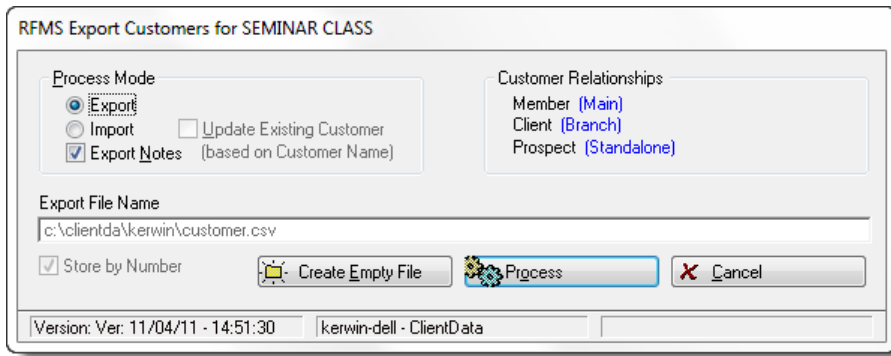
Upon entry into the program, it always starts in Export mode.

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## Exporting Customer Records

This screen allows exporting the customer file data into a text file that can be used by other programs (Excel, Word, etc.). The export file can also be used to transfer existing customer file data to other store locations that are running a separate copy of RFMS. Export mode is fairly straightforward, exporting customer information in a format that is understandable to the user.

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## Process Mode

Click on the Export radio button to select it. During the export process, a progress bar will display. If the export process is canceled, the **CUSTOMER.CSV** file is removed.

## Export Notes

This option allows exporting notes added against a customer record to the **CUSTOMER.CSV** file.

## File Name

The program will automatically set the Export File Name to **CUSTOMER.CSV** in the RFMS Directory. This field (file name) is not changeable.

## Store by Number

If this box is checked, then Store Numbers will be exported as 049, 53, 102, etc. If this box is not checked, then Stores will appear as "A", "F", "3", etc.

## Customer Relationships

The fields for the export must be set to parent, child and standalone. Records which are blank for this field will be considered standalone. The fields in parenthesis represent the parameters set under Utilities, Parameters, Public Parameters, Prompts (cont.).

## Create Empty File

Clicking on this button will create an "empty" template file in the RFMS directory.

## Process

Click on the **Process** button to create the file.

## Cancel

Click on the **Cancel** button to cancel or exit the program.

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## Entering Data

Please be very careful when you are inserting data into RFMS from a spreadsheet or simply copying and pasting from one program to another. Data with spaces before or after will cause issues in the system.

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## Importing Customer Records

This screen allows importing customer file information from the **CUSTOMER.CSV** file.

The screenshot shows a dialog box titled "RFMS Import Customers for SEMINAR CLASS". It contains several sections: "Process Mode" with radio buttons for "Export" and "Import" (selected), and a checked "Import Notes" checkbox; "Customer Relationships" with a list of "Member (Main)", "Client (Branch)", and "Prospect (Standalone)"; an "Import File Name" text field with a browse button; a "Populate Imported Customer's Store with" dropdown menu showing "049 - STORE #1 (Default Store)"; a checked "Store by Number" checkbox; and buttons for "Create Empty File", "Process", and "Cancel". A status bar at the bottom shows "Version: Ver: 11/04/11 - 14:51:30" and "kerwin-dell - ClientData".

Make sure the file to import is closed before beginning the process.

### Process Mode

Click on the Import radio button to select it. After the import process has completed, a dialog box will appear indicating the number of Customer records added to the RFMS file.

### Import Notes

This option allows importing notes added against a customer record from the **CUSTOMER.CSV** file. For information on how to format Customer notes for importing into RFMS consult Formatting Customer Notes.

### Update Existing Customer

If this selection is left unchecked on import and the system locates a file that matches in both the IMPORT file and in the RFMS Customer File, no update will take place to the current information. Only new customers will be added. However, this option is selected; any import information that differs from existing customer information will replace the existing information in the corresponding columns of the RFMS Customer File.

### Customer Relationships

The fields for the import must be set to parent, child and standalone. Records which are blank for this field will be considered standalone. The fields in parenthesis represent the parameters set under Utilities, Parameters, Public Parameters, Prompts (cont.).

### Import File Name

Select the Import File Name by clicking on the ellipsis button. No default file name is provided. Once the Import File Name is specified, the Process button will be enabled.

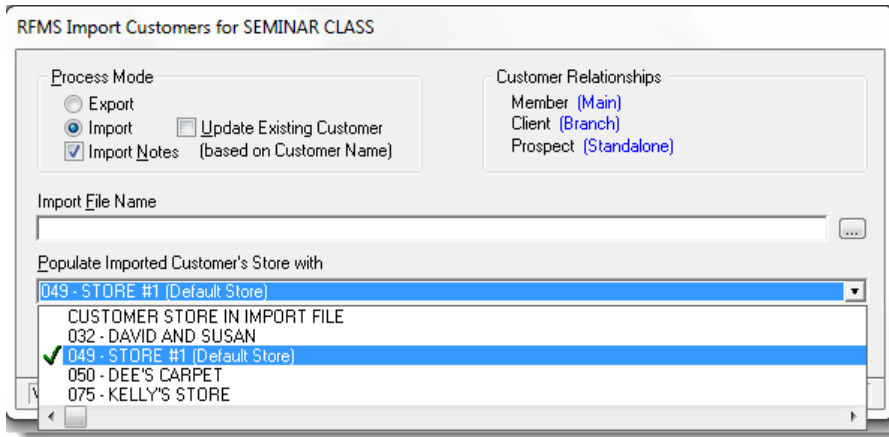
### Populate Imported Customer's Store with:

This section has been updated to consolidate three selections into a single pull down. Note that the pull down's default value is the default Store.

There are really only two things that can be done with the pull down:

1. Select that all incoming Customers' Store is filled with the specified Store

2. Populate the Customers' Store with what is in the Store column in the CSV.
  - a. Before importing, all incoming Stores will be checked to be sure they are in the proper format.



### Create Empty File

Clicking on this button will create an "empty" template file in the RFMS directory.

### Process

Click on the **Process** button to import the file.

### Cancel

Click on the **Cancel** button to cancel or exit the program.



#### Notes:

It is possible to do batch updates of existing customer information.

For example, to change all Customers sales rep from Ruby to Nancy

1. Export to customer.csv.
2. Open CSV with Excel.
3. Highlight both Sales Rep columns.
4. Replace all instances of Ruby with Nancy.
5. Save as CSV.
6. Select Import
7. Check "Update Existing Customer"
8. Process

Click [here](#) to see where the fields from the CSV go on the Customer Information Screen.

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## The Customer CSV File

Because the Export file is a .CSV file (or generic text format), it can be used by many other applications outside of RFMS, including Word and Excel. For a template of the RFMS file for future importing, create an EMPTY file from the Export/Import screen by clicking on the corresponding button. This file will be automatically sent to the RFMS directory (just as the normal customer export file would).

Whether empty or containing information, the file will be called Customer.csv. See the file specifications at the end of this document.

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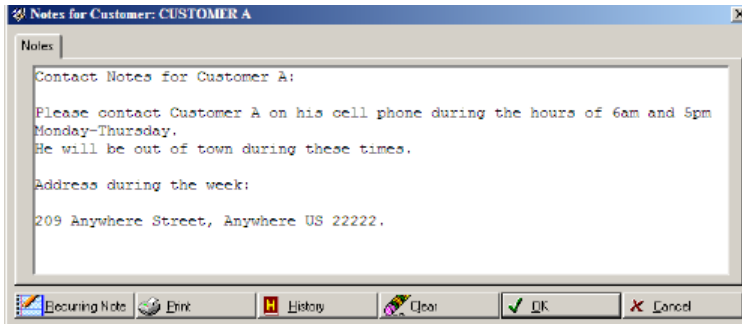
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## Formatting Customer Notes

Use this formatting code when adding Customer Notes to a Customer.CSV file. This will only apply if creating these Customer records external to RFMS and importing them into the system via the Customer Export/Import program or if adding customer records to an existing Customer.csv file with the intention of importing into RFMS.

### Formatting Notes Example:

- To add the following note in the .csv file to Customer A's record and want it to appear in RFMS as follows:



- To have the Note appear as it does in the above graphic, enter exactly as shown below:
- Contact Notes for Customer A:[CR][CR]Please contact Customer A on his cell phone during the hours of 6am and 5pm Monday-Thurseday.[CR]He will be out of town during these times.[CR][CR]Address during the week:[CR][CR]209 Anywhere Street, Anywhere US 22222.
- Hard carriage returns are denoted by [CR]. A hard carriage return is defined by how many times in the course of typing these notes in RFMS on the actual Customer record that would include spaces between sentences by clicking the return key.
- To have two hard carriage returns between the first and second sentence as shown above, type the appropriate sentence followed by [CR][CR]. As in the above graphic, there are two spaces between sentence one and two.
- REMEMBER: There is to be no space between the regular text and the carriage return symbol and no space between one or more carriage return symbols.
- To have only one hard carriage return between sentences type only one [CR]. Don't add any spaces between the carriage return symbol and the regular text. Note that between the second and third sentences in the above example there is only one return space.
- To indent, click the space bar as many times as needed to indicate the amount of spaces needed on the indent. For example, to indent five spaces, click the space bar 5 times. If there are sentences before the indent, be sure to include [CR] or as many hard carriage returns as needed before clicking the spacing for the indent.

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## RFMS Customer Import / Export Specification

### CUSTOMER.CSV

Customer Name	STRING (30)	Enter as LAST, FIRST WITH NO SPACES
Customer Address #1	STRING (30)	
Customer Address #2	STRING (30)	
Customer City	STRING (30)	
Customer State	STRING (2)	
Customer Zip	STRING (10)	
Customer Country	STRING (20)	

Ship Name	STRING (30)	Enter as LAST, FIRST WITH NO SPACES
Ship Address #1	STRING (30)	
Ship Address #2	STRING (30)	
Ship City	STRING (30)	
Ship State	STRING (2)	
Ship Zip	STRING (10)	
Ship Country	STRING (20)	
Ship Via	STRING (20)	
Telephone #1	STRING (12)	Enter as ###-###-####
Telephone #2	STRING (12)	Enter as ###-###-####
Telephone #3	STRING (12)	Enter as ###-###-####
Salesman #1	STRING (25)	Name must be in the RFMS Salesperson list
Salesman #2	STRING (25)	Name must be in the RFMS Salesperson list
Account ID	STRING (20)	
Tax ID	STRING (20)	
Contact #1	STRING (30)	
Contact #2	STRING (30)	
Credit Limit	NUMERIC (10.2)	{#####.##}
Customer Type	STRING (15)	WHATEVER IS TYPE IN HERE WILL BE ADDED TO CUSTOMER TYPE LIST
Not Used #1	STRING (30)	
Terms	STRING (10)	
Price Modifier or Level	NUMERIC (5.2)	{###.##}
Not Used #2	STRING (30)	
Require PO	STRING (1)	{T / F} T will check the box F will not check the box
Term Days	NUMERIC (4)	{####}
Temporary Member	STRING (1)	{T / F}
Status	STRING (1)	{1/0} 1= Active 0 = Inactive
Relationship	STRING (10)	{Main/Branch/Standalone} DEFAULTS TO STANDALONE
Classification	STRING (20)	{ProSource Clients only must be from pre-defined list}
Sold Salutation	STRING (5)	{Mr. /Mrs. / Ms.}
Sold Business	STRING (30)	
Ship Salutation	STRING (5)	{Mr. / Mrs. / Ms.}
Ship Business	STRING (30)	
Email	STRING (100)	
Telephone #4	STRING (12)	Enter as ###-###-####
Telephone Extension	STRING (4)	This displays with Telephone #2
Telephone #5	STRING (12)	Enter as ###-###-####
Referring Member	STRING (30)	{ProSource Clients only}
Not Used #3	STRING (30)	
Renewal Date	DATE (YYYYMMDD)	
Source	STRING (20)	{ProSource Clients only must be from pre-defined list}
SS/ FEIN	STRING (11)	
Driver's License	STRING (15)	
Driver's State	STRING (2)	
Date of Birth	DATE (YYYYMMDD)	
Tax Type	STRING (1)	{ "T"axable / "E"xempt / "R"esale }
Tax ID	STRING (20)	
Business Card Y/N	STRING (1)	{Y / N} {ProSource Clients only}
Allow Mail Y/N	STRING (1)	{Y / N}
Not Used #4	STRING (30)	
Not Used #5	STRING (30)	

Date Entered	DATE (YYYYMMDD)	
Date Edited	DATE (YYYYMMDD)	
Not Used #6	STRING (1)	
Not Used #7	STRING (1)	
Not Used #8	STRING (1)	
Not Used #9	STRING (1)	
Not Used #10	STRING (1)	
Not Used #11	STRING (1)	
Not Used #12	STRING (1)	
Not Used #13	STRING (1)	
Not Used #14	STRING (1)	
Not Used #15	STRING (1)	
Not Used #16	STRING (1)	
Not Used #17	STRING (1)	
Store	STRING (3)	MAKE SURE A STORE IS ENTERED; Must be in the store file
Member since	DATE (YYYYMMDD)	
Last Order Date	DATE (YYYYMMDD)	
Last Delivery Date	DATE (YYYYMMDD)	
Tax Expire Date	DATE (YYYYMMDD)	
Renewal Amount	NUMERIC (10.2)	{#####.##}
Sold Name to Export	STRING (1)	{"I"ndividual / "B"usiness} Default is Business
Ship Name to Export	STRING (1)	{"I"ndividual / "B"usiness} Default is Business
Not Used #18	STRING (30)	
ReferralCalc	STRING (1)	{"F"lat Rate / "D"ollar Spread}
Not Used #19	STRING (30)	
Not Used #20	STRING (30)	
Notes	STRING (1794)	
StatementEmail	STRING(100)	