



# Updating customer information, many customers at once

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## SWCS Tips and Tricks

2/14/2013

Using the SWCS 4.2 Export Utility, Microsoft Excel and the SWCS 4.2 Import Utility, update information such as active status, shipping method, etc. for many customers at once.

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## Overview

This article will step you through the process of exporting customers from your SWCS company database using the SWCS 4.2 Export Utility, updating the exported data in Microsoft Excel and the using the SWCS 4.2 Import Utility to update the customers in your company database.

## What you will need

- Solatech Window Covering Software 4.2, version 4.2.441 or higher.
- Microsoft Excel 2010
- SWCS 4.2 Export Utility
- SWCS 4.2 Import Utility

If you have not used the SWCS 4.2 Export Utility or the SWCS 4.2 Import Utility before then you should read over their user's guides. You can download the SWCs 4.2 Export Utility User's guide from <http://www.solatech.com/manuals/swcs42euuserguide.pdf> and the SWCS 4.2 Import Utility User's Guide from <http://www.solatech.com/manuals/swcs42iuuserguide.pdf>.

## Before you start

Solatech recommended making a backup of your SWCS company database before performing any importing of data.

**NOTE: THIS MUST BE DONE FROM THE SERVER AS BACKUPS CANNOT BE MADE FROM NETWORK WORKSTATIONS.**

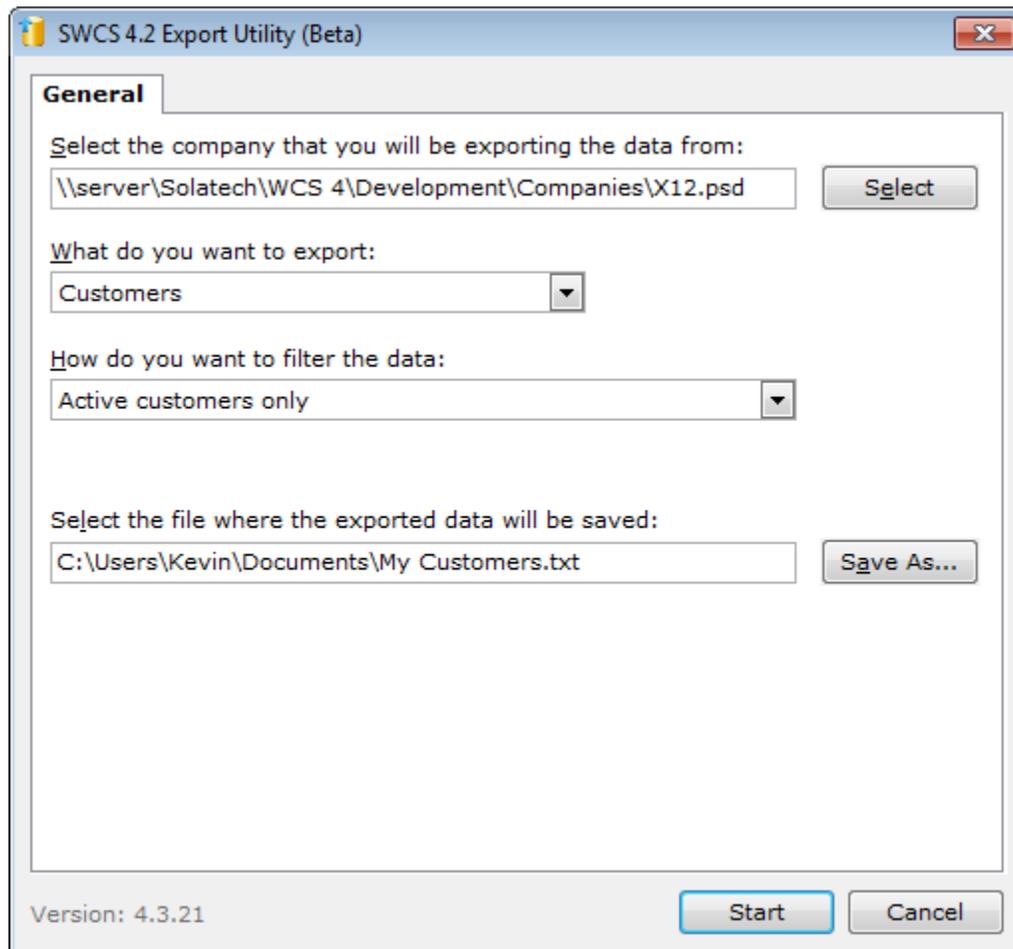
1. Run SWCS.
2. From the File menu, click Other Company Functions, Backup.
3. Choose the type of backup to perform. Solatech recommends the third option, *The active company database, product files, reports and all other files.*
4. Click Save As and select a location and file where the backup will be created.
5. Click Start to create the backup.

## The Steps

### Export the customers

1. Run the SWCS 4.2 Export Utility.
2. Click the Select button to select the SWCS company that contains the customers you want to create labels for.
3. Under *What do you want to export*, select Customers.
4. Under *How do you want to filter the data*, select how you want to filter the customers.
5. Click Save As and select a file where the exported data will be saved. This file will be the file you open with Excel.

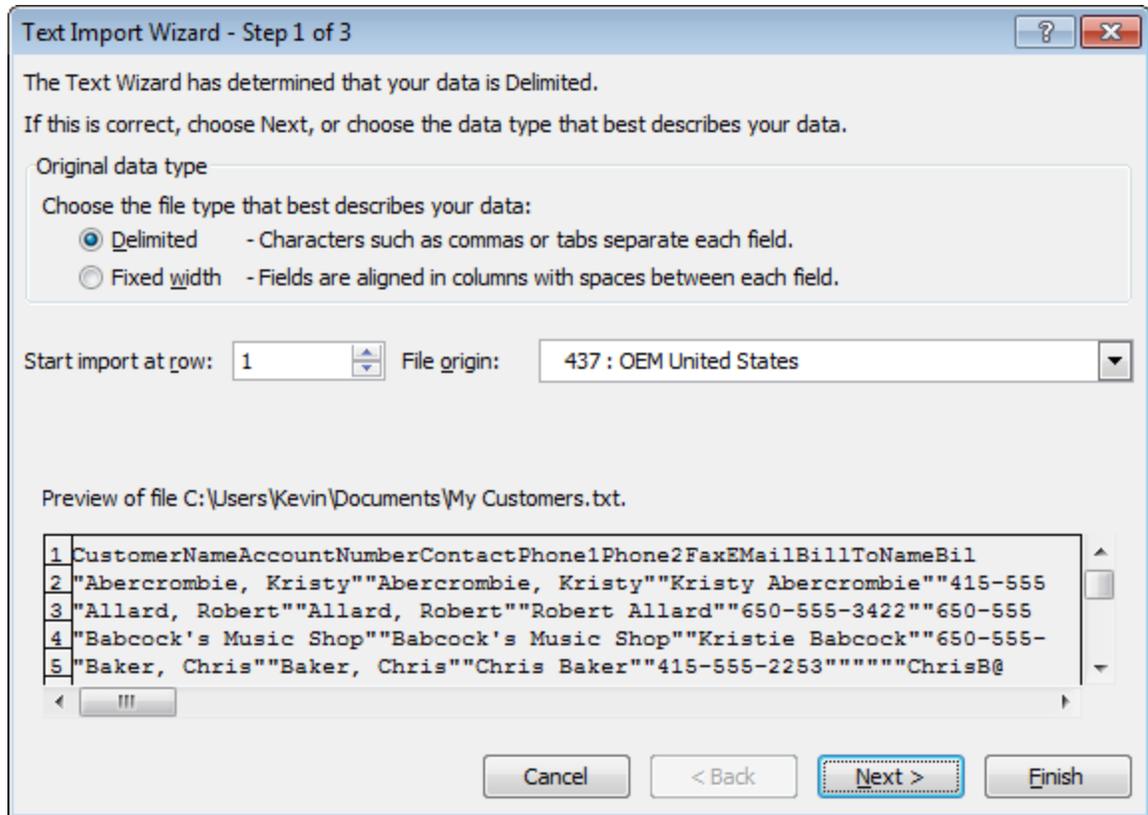
6. The export utility should now look similar to this:



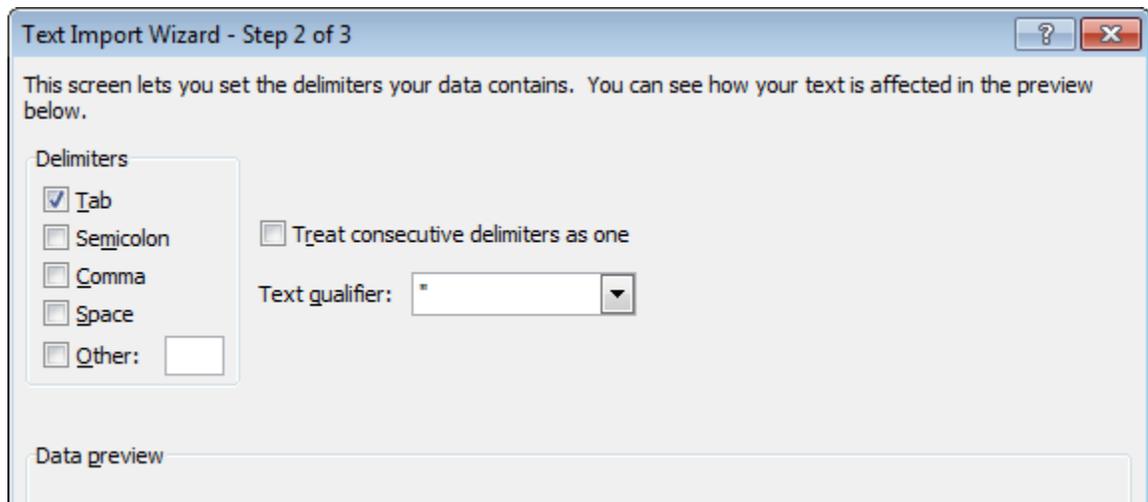
7. Click Start to export the customers. You may be prompted to login to the SWCS company.
8. Once the customers have been exported you can close the export utility.

## Modify the exported data

1. Run Microsoft Excel by clicking on its shortcut.  
*Note: Don't run Excel by double-clicking on the customer export file or right-clicking on the customer export file and selecting Open with. This won't open the export file the correct way.*
2. Click File, Open.
3. Navigate to the folder where you saved the exported customer file, select it and click Open. You may need to change the file filter on the Open dialog box to All Files.
4. The Text Import Wizard will start.
5. For the Original data type, select Delimited.



6. Click Next.
7. Check Tab in the list of delimiters. Make sure this is the only delimiter checked.



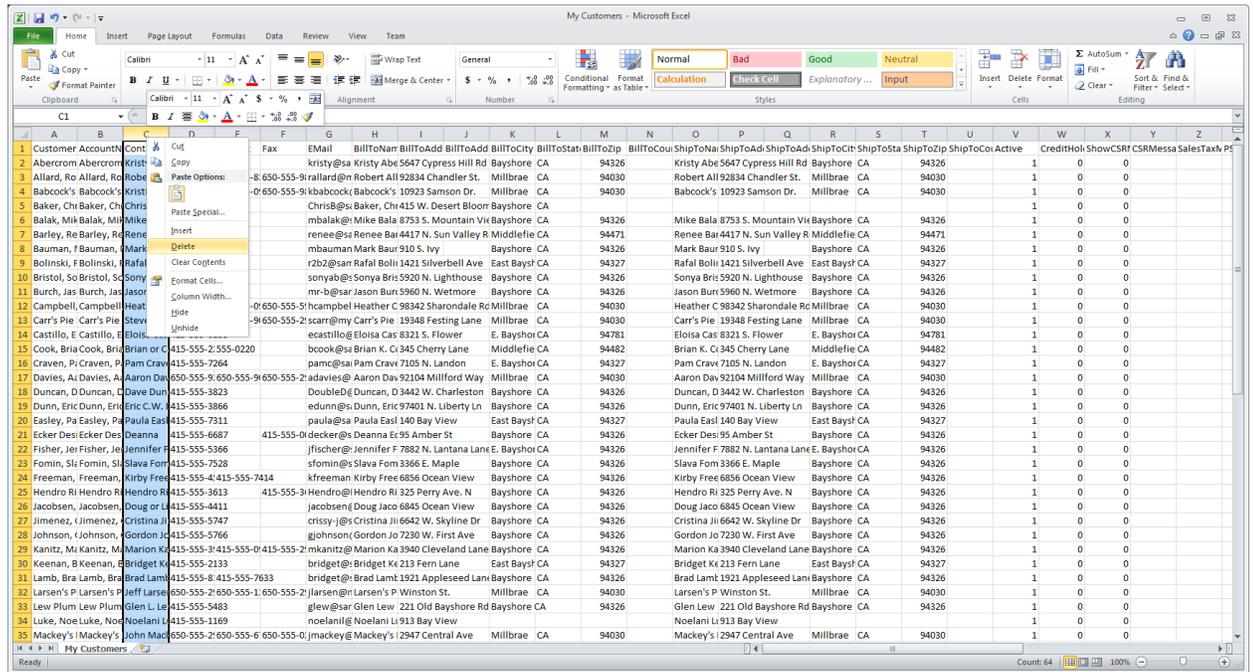
8. Click Finish.

9. Excel should now look similar to this:

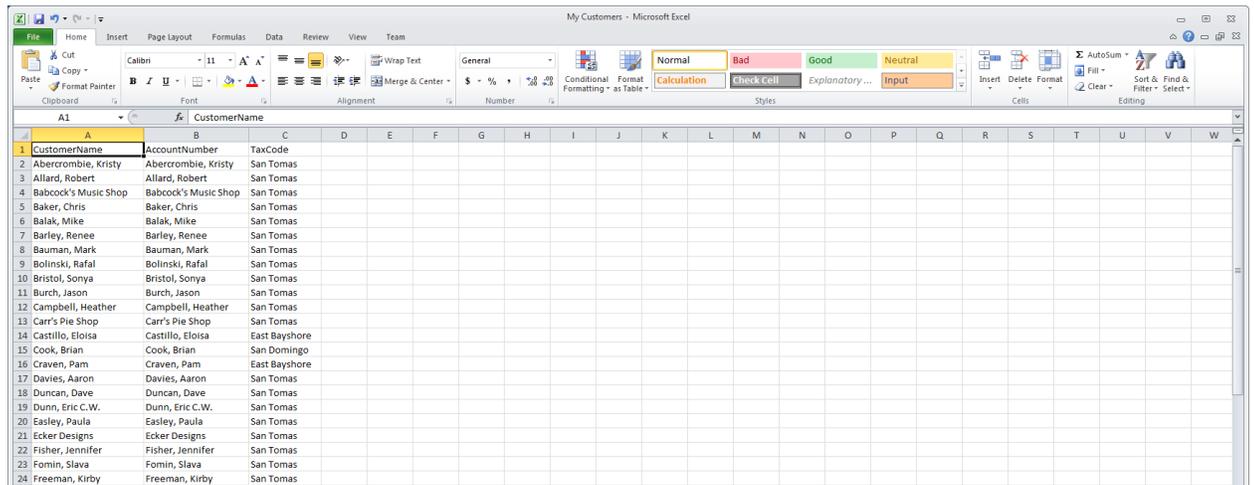
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10. When you are importing customer changes you want to make sure you only import the data you are changing. The export file has all of the customer information so you will want to delete the columns that don't apply to what you are changing. For example if all you want to change on your customers is the discount group then you would delete all the columns except the CustomerName, AccountNumber and Discount Group.
11. In this tutorial we will be changing the sales tax code on all customers to (None). Start by clicking the Excel column header for column C. This will highlight the entire column.

12. Right-click on the column header and select Delete from the menu.



13. Repeat this for all other columns except those that have CustomerName, AccountNumber and TaxCode in row 1. When you are done your Excel data should look similar to this.



14. You need to change the column headings (the values in the first row) so that the import utility can find what it needs. Change *CustomerName* to **name**, *AccountNumber* to **account** and *TaxCode* to **salestaxcode**.

15. Now you are ready to make any changes to the data. You can add columns of data if you need to. Refer to the SWCS 4.2 Import Utility User's Guide for information on the supported columns. In this tutorial we are changing the sales tax code on all customers to (None) so we replace all the values Column C (except the first row since that's the column heading row) to (None).
  - a. Refer to the SWCS 4.2 Import Utility User's Guide for information on allowed values.
16. Save the workbook (File, Save). When prompted if you want keep the workbook format, click Yes.
17. Close Excel.

### Update the customers by doing an import

1. Run the SWCS 4.2 Import Utility.
2. Click **Select** and select the company that you want to import data into.
3. Under **What do you want to import**, select the type of data you are importing. For this tutorial we will be importing customers.
4. Click **Open** and select the file you want to import. This will be the file you saved the in previous steps.
5. Under **How is this file formatted**, click select Tab Delimited.
6. Click Start. The data will be imported.
7. Close the SWCS 4.2 Import Utility.