

Entity Import

The **Import Entities from CSV** screen can be used to import Entity records from a CSV file. A CSV file [import_template](#) can be downloaded that contains the following fields:

CSV Fields Mapping to Entity Screen:

CSV Column	Entity Parent Tab	Drill down Tab	Entity Fields
id	Hidden	<i>Hidden</i>	<i>Hidden</i>
ent_no	Entity tab		Entity No
name	Entity tab		Name
website	Entity tab/Contacts tab	Contact Information panel	Website
type	Entity tab		Entity Type
con_name	Contacts tab	Entity Contact screen	Contact Name
con_phone	Contacts tab	Entity Contact screen	Phone
con_fax	Entity tab/Contacts tab	Contact Information panel	Fax
con_email	Contacts tab	Entity Contact screen	Email
loc_name	Entity tab/Locations tab	Entity Location screen	Location Name
loc_addressline1	Entity tab/Locations tab	Entity Location screen	Address
loc_city	Entity tab/Locations tab	Entity Location screen	City
loc_state	Entity tab/Locations tab	Entity Location screen	State
loc_zipcode	Entity tab/Locations tab	Entity Location screen	Zip/Postal
loc_country	Entity tab/Locations tab	Entity Location screen	Country
loc_termsId	Locations tab	Entity Location screen	Terms
loc_pricelevel	Locations tab	Entity Location screen	Pricing Level
loc_warehouse	Locations tab	Entity Location screen	Warehouse
loc_timezone	Entity tab/Locations tab	Entity Location screen	Time Zone
cus_number	Customer Tab	Detail Tab	Legacy Customer ID
cus_type	Customer Tab	Detail Tab	Type
cus_salesperson	Customer Tab	Detail Tab	Salesperson
cus_creditlimit	Customer Tab	Misc tab	Credit Limit
cus_porequired	Customer Tab	Misc tab	PO Required
cus_employee_count	Customer Tab	Detail > CRM Details panel	Employee Count
cus_revenue	Customer Tab	Detail > CRM Details panel	Revenue
sal_salespersonid	Salesperson Tab		<i>Hidden</i>
ven_vendorId	Vendor Tab	Detail Tab	Legacy Vendor ID
ven_expenseId	Vendor Tab	Detail Tab	GL Account
ven_type	Vendor Tab	Detail Tab	Type
ven_taxno	Vendor Tab	Detail Tab	Tax No
user_name	User Tab		Username
user_password	User Tab		Password
user_role	User Tab		User Role
user_policy	User Tab		Security Policy

Note: Not all entities can be imported. Here is a list of the entities where importing is allowed:

- Customer
- Vendor
- Salesperson
- Shipping Lines
- Forwarding Agents
- Terminals
- Insurer

- Futures Broker
- Producers
- Users
- Competitors (18.3)
- Leads (18.3)
- Liens (18.3)

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con_email	Contacts tab	Entity Contact screen	Email
loc_name	Entity tab/Locations tab	Entity Location screen	Location Name
loc_addressline1	Entity tab/Locations tab	Entity Location screen	Address
loc_city	Entity tab/Locations tab	Entity Location screen	City
loc_state	Entity tab/Locations tab	Entity Location screen	State
loc_zipcode	Entity tab/Locations tab	Entity Location screen	Zip/Postal
loc_country	Entity tab/Locations tab	Entity Location screen	Country
loc_termsId	Locations tab	Entity Location screen	Terms
loc_pricelevel	Locations tab	Entity Location screen	Pricing Level
loc_warehouse	Locations tab	Entity Location screen	Warehouse
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cus_porequired	Customer Tab	Misc tab	PO Required
cus_employee_count	Customer Tab	Detail > CRM Details panel	Employee Count
cus_revenue	Customer Tab	Detail > CRM Details panel	Revenue
sal_salespersonid	Salesperson Tab		<i>Hidden</i>
ven_vendorId	Vendor Tab	Detail Tab	Legacy Vendor ID
ven_expenseId	Vendor Tab	Detail Tab	GL Account

Pages:

- [Common Entity Import](#)