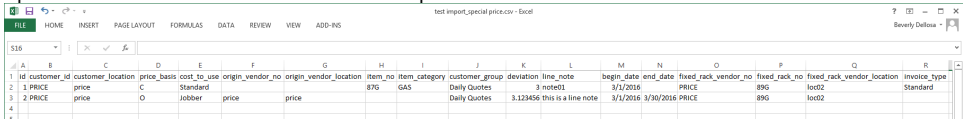


# How to Import Customer Special Price

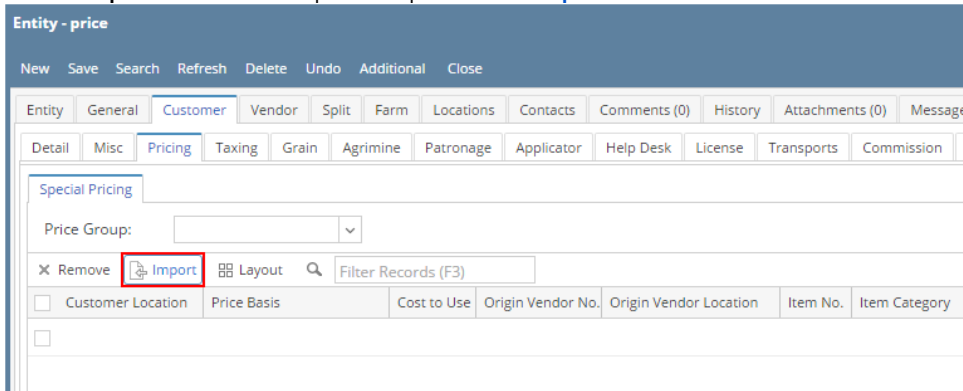
1. Before you proceed, make sure that you have the csv file for import. to get the latest template, click the **Template** button on Import Customer Special Price From CSV screen. Here is a sample record.



The screenshot shows an Excel spreadsheet with the following data:

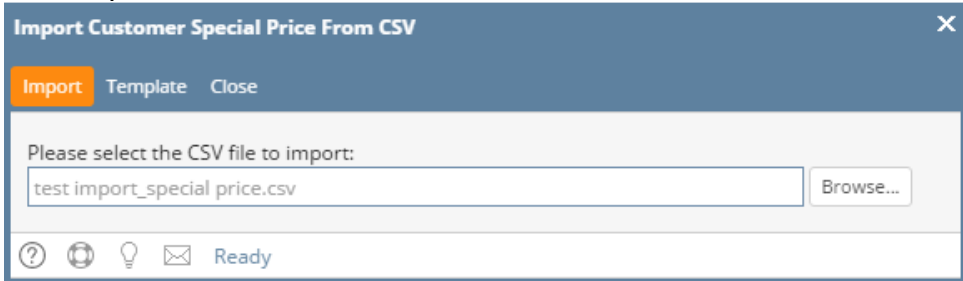
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	id	customer_id	customer_location	price_basis	cost_to_use	origin_vendor_no	origin_vendor_location	item_no	item_category	customer_group	deviation	line_note	begin_date	end_date	fixed_rack_vendor_no	fixed_rack_no	fixed_rack_vendor_location	invoice_type
2	1	PRICE	price	C	Standard			890	GAS	Daily Quotes	3	noted1	3/1/2016		PRICE	890	loc02	Standard
3	2	PRICE	price	O	Jobber	price	price			Daily Quotes	3.123456	this is a line note	3/1/2016	3/30/2016	PRICE	890	loc02	
4																		

2. Open a Customer Entity record and navigate to **Customer tab | Pricing tab**.  
3. Click the **Import** button. This will open the Import **Customer Special Price From CSV** screen.



The screenshot shows the 'Entity - price' screen with the following tabs: Entity, General, Customer, Vendor, Split, Farm, Locations, Contacts, Comments (0), History, Attachments (0), Message. The 'Customer' tab is selected, and the 'Pricing' sub-tab is active. The 'Special Pricing' section shows a 'Price Group' dropdown. Below this, there is a table with columns: Customer Location, Price Basis, Cost to Use, Origin Vendor No., Origin Vendor Location, Item No., Item Category. The 'Import' button is highlighted with a red box.

4. Click the **Browse** button and select the appropriate csv file.  
5. Click the **Import** button.



The screenshot shows the 'Import Customer Special Price From CSV' screen. It has a title bar with 'Import', 'Template', and 'Close' buttons. The main area contains the text 'Please select the CSV file to import:' followed by a text input field containing 'test import\_special price.csv' and a 'Browse...' button. At the bottom, there is a status bar with icons for help, refresh, lightbulb, and email, and the word 'Ready'.

The process will take a while depending on the number of records for import. If one of the records is not successfully imported, the system will show this message.



## iRely i21

The importing of data has failed!

OK

Click **OK button** to view the import **Log** which will list down the failed records and why it was not imported.



6. Once the import process is successful, the system will show this message. Click **OK button** on it.



## iRely i21

Import Successful

OK

7. Open the Customer record and verify the imported details. Note that the details from csv file that is not necessary to the price basis will be disregarded.

Entity - price

New Save Search Refresh Delete Undo Additional Close

Entity General Customer Vendor Split Farm Locations Contacts Comments (0) History Attachments (0) Messages Custom Audit Log (18)

Detail Misc Pricing Tasting Grain Agronomy Patronage Application Help Desk License Transports Commission Buyback Contracts Field data

Special Pricing

Price Group: [Dropdown]

K Remove Import Layout Filter Records (0)

	Customer Location	Price Basis	Cost to Use	Origin Vendor No.	Origin Vendor Location	Item No.	Item Category	Customer Group	Deviation	Line Note	Begin Date	End Date	Fixed Back Vendor No.	Fixed Back No.	Fixed Back Vendor Location	Invoice Type
price	Origin Back + Misc	juster	PRICE	price					5.123456	See it a time note	3/1/2016	3/30/2016				
price	Inventory Cost + Pto	Standard				870	GAS		3.000000	novel1	3/1/2016					Standard
									0.000000							