Importing Customers in Accounts Receivable

Using the **Import** option in Add/Edit Customers, you can add customer and family records from the People, Organizations, or HeadMaster products to Accounts Receivable.

This can save valuable time since you do not have to enter customers' records twice, and information such as the customer's name, date of birth, address, phone, and e-mail imports from these products.

You can also create parent records to import family records from those products if Accounts Receivable is configured to track family records.

Useful Information

If using the Track Family Records option in Accounts Receivable Setup, the Contacts, Billing, and Payment Codes tabs will not display under a parent record type.

1. Under Manage Records, click the **Records** tab.
2. In the drop-down list, select **Add/Edit Customers**. Click **Go** .
3. Click **Import** to begin the import process.
4. Select the product from which you are importing records.
5. In the drop-down list, select the appropriate dataset.
6. If you are importing records from People or HeadMaster and want to create parent records, select **Create Parent Records**. This option is not available when importing from Organizations.

   Note

   Create Parent Records only displays if your Accounts Receivable settings are configured to track family records. Do not select this option if your data already contains parent records, as duplicate records will be created in ACS.
7. Click **OK**.
8. Select the person or organization to import and click **OK**.
9. The individuals or organizations are added to the grid in the Add/Edit Customers window. If you selected **Create Parent Records**, the individual's family members also display in the window.
10. Select the imported individual or organization and click **Edit** if you want to review or edit the record. To learn more about the different fields you can edit in a customer's record, see Editing a Customer's Record.

Tip

After importing a record from People, HeadMaster, or Organizations, the Refresh link displays on the Add /Edit Customers grid. This denotes that you imported the record from People, HeadMaster, or Organizations and does not display on manually added records. When you make changes to the record in the People module, you can refresh the customer in Accounts Receivable. If you make the changes in Accounts Receivable and then refresh, the information in People overwrites the changes you made in Accounts Receivable. The same is true if you import records from HeadMaster; the refresh option updates the records based on the information in HeadMaster.