Import Users

Overview

CMS Administrators can add new users and user customers, edit user Ids or delete website user records by manually changing each record. However, if there are many users to add or edit, these can be bulk uploaded using the CSV user import feature.

The CSV file contains user record fields and user data for these fields. Some fields are required by the system and must be included in the file. Others are optional and whether they are added depend on whether they are used in your business. Optional fields can also be custom fields created to cater for your particular business needs.

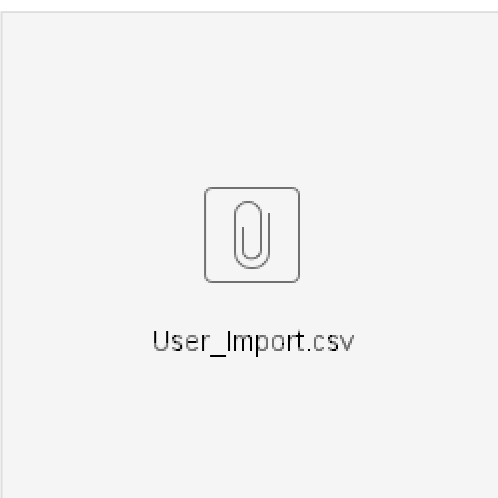
On this page:

Step-by-step Guide

1. Prepare CSV File

When preparing the CSV file, make sure all required fields have been added as column headers of the first row, Also add any optional fields used by your business. Each row after the first one is to be populated with a unique user's data. Here is an example template you can download as a guide, or follow the instructions to create one from scratch.

Download User CSV Template



The following fields are used when importing a user. Fields marked with * are mandatory. NOTE - Some optional fields may not be in use on your site.

Field Name	Field Description
EmailAddress*	User ID (in most cases, the User ID is the user's email address)
NotifyEmailAddress*	Contact Email Address
Deactivated	Should user be disabled upon creation? Enter 'Yes' or 'No'. If 'Yes', the user will not be able to login until 'Disabled' is removed in the CMS. **NOTE** - If left blank, the default 'No' will apply. This means the user will automatically be able to login to your website and receive notification of new user registration.
FirstName	First Name
LastName	Last Name
Password*	Password
ConfirmPassword	Force the user to change their password when they first login to your website after the import. Enter 'Yes' or 'No'. **NOTE** - If left blank, the default 'No' will apply. This means the user does not have to change their password the first time they login.
JobTitle	Job Title
Section	Department
PhoneNumber*	Contact Phone Number
Fax Number	Fax Number
DefaultCostCentre	*(Only applicable if Cost Centre feature is used.)* Default Cost Centre. See guide on Cost Centres.
CustomerCode*	Default Customer Account. See guide on Default Customer Account.
GlobalCatalogueAccess	Can the user view the entre product range? Enter 'Denied', 'Full', 'ViewOnly', or leave blank if custom catalogues are not used.
OrdersApprovedBy	For use with order approvals feature.
SpecialInstructions	Special Instructions
ContractItemsOnly	Contract Items Only. Enter 'Yes' or 'No'.
InitialRole*	Initial Role
ApprovalType	*(Only applicable if Approvals has been set up for this user or customer account.)* Enter: SPU, MPU, SPA, MPA, MPAS, H, HC, HAL or leave blank
ApproveNonContract	*(Only applicable if Approvals has been set up for this user or customer account.)* Enter 'Yes' or 'No'.
DenyApprovalProductEntry	Deny Product Entry on Approval. Enter 'Yes' or 'No'
AllowApprovalProductEntry	Allow Product Entry on Approval. Enter 'Yes' or 'No'.

User Custom Fields

If User custom fields have been added, you can enter them in your CSV file. Make sure a custom field is prepended by 'CUS_' in the file. Example: '**test**' becomes '**CUS_test**' in the CSV file. See: Create User Custom Fields.

Create User CSV File

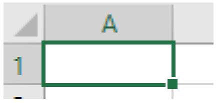
To create the CSV file from scratch:

1. In an editor such as Notepad, open a new text file. You can also use Excel.

1. Copy the header text.
`EmailAddress, NotifyEmailAddress, Deactivated, FirstName, Surname, Password, ConfirmPassword, JobTitle, Section, PhoneNumber, FaxNumber, DefaultCostCentre, CustomerCode, GlobalCatalogueAccess, OrdersApprovedBy, SpecialInstructions, ContractItemsOnly, InitialRole, ApprovalType, ApproveNonContract, DenyApprovalProductEntry, AllowApprovalProductEntry`

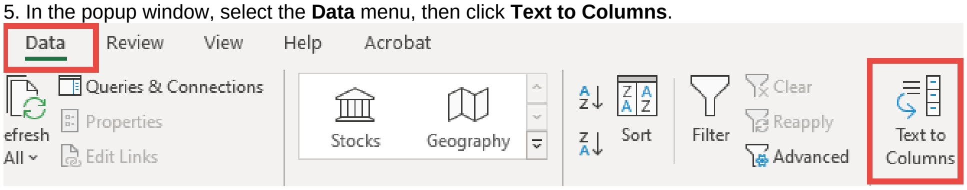
2. Open a blank Excel worksheet.

3. Click to select the first row in the first column,



4. Paste the text into the cell.

5. In the popup window, select the **Data** menu, then click **Text to Columns**.



6. Select **Delimited**, then **Next**.

7. Tick **Comma**. If it's correct, you'll see lines between each row of data.

8. Click **Next**.

8. Click **Finish**.

9. Save the file. The data will now be correctly formatted into the columns.

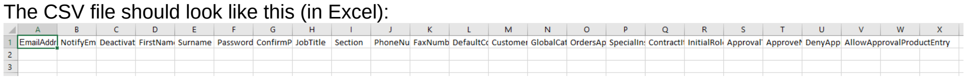
2. Copy and paste the following text into the file:
`EmailAddress, NotifyEmailAddress, Deactivated, FirstName, Surname, Password, ConfirmPassword, JobTitle, Section, PhoneNumber, FaxNumber, DefaultCostCentre, CustomerCode, GlobalCatalogueAccess, OrdersApprovedBy, SpecialInstructions, ContractItemsOnly, InitialRole, ApprovalType, ApproveNonContract, DenyApprovalProductEntry, AllowApprovalProductEntry`

3. Save as a .csv file.

2. Populate the CSV File with Records

1. Open this CSV file in Excel. The header text (fields) should be displayed in Row 1 (Line 1) of the first 22 columns.

   The CSV file should look like this (in Excel):



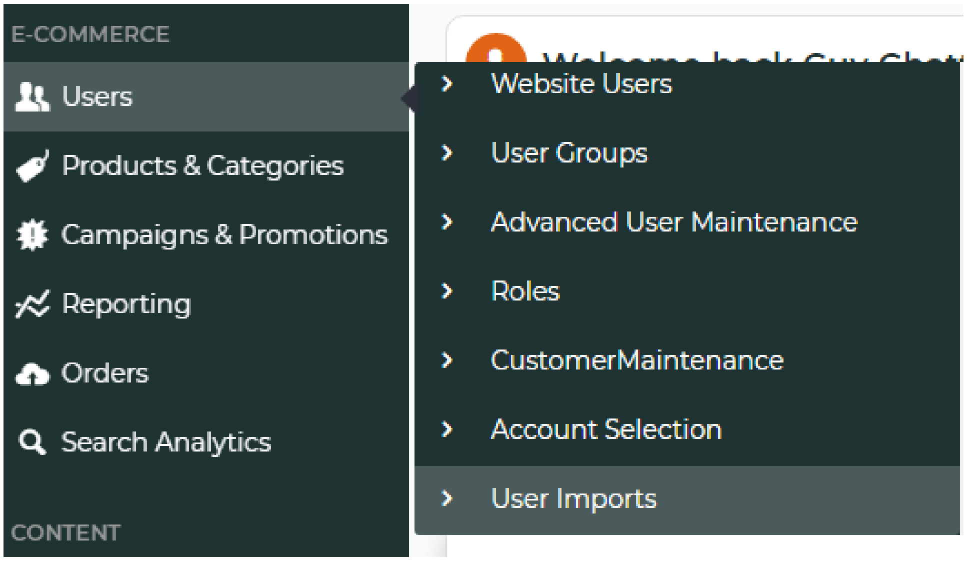
2. Enter one user record per row. This means User 1 occupies Row 2 (Line 2), etc. **NOTE -** Some fields are mandatory. If a mandatory field is not populated for a user record, the user will not be uploaded. Also, your site may not be using all optional fields. If not used, leave blank.

3. When all records have been entered, save the file.

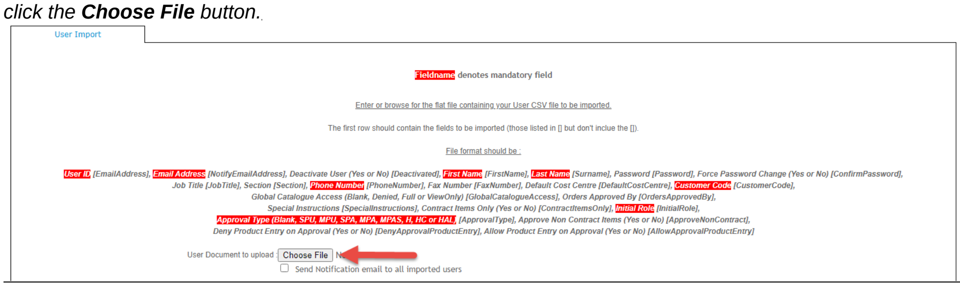
3. Upload CSV File

To upload the prepared CSV file to your website:

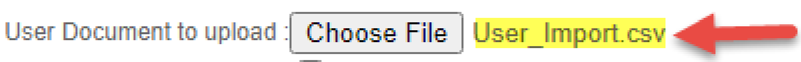
1. *In the CMS, go to **Users User Imports**. Or when logged in as Administrator on your site, **Accounts User Import** (/zUserImport.aspx). **NOTE -** If this page has not been set up for your website, you can add it using the Add New Menu Item function.*



2. *In the first section of the page called '<u>Enter or browse for the flat file containing your User CSV file to be imported.'</u>, click the* ***Choose File*** *button.*

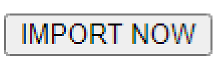


3. *Select the CSV file. Once selected, the file name displays next to Choose File.*

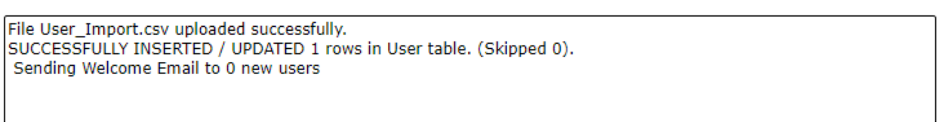


4. *To have a registration notification emailed to every new user, tick* ***Send Notification email to all imported users****.* ***NO TE -*** *Users flagged as initially deactivated will not be sent an email notification.*

5. *Scroll down and click the* ***Import Now*** *button.*



6. *Check the message box below 'Import Now' to verify your import is successful. Any skipped rows and errors will be displayed.*



Import Customer User Records

A customer user record is a user record that is linked to a customer account. It is used to cater for users who may belong to more than one customer account. The process of importing customer user records is similar to that for users. **NOTE -** To bulk import customer users, the user Id (EmailAddress) must already exist as a website user.

These are the standard fields for customer user records:

Field Name	Field Description
EmailAddress*	User ID (in most cases, the User ID is the user's email address)
CustomerCode*	Customer account code
InitialRole*	Initial user role
ApprovalLimit*	Approval Limit. The maximum order limit this user can approve.
OrderLimit*	Order Limit. The maximum amount this user can order before approval is required.
ReqLimit*	Requisition Limit. The maximum amount of an order for this user in this customer account.
ApprovalGroup	If approval groups are used for this customer, enter the Approval Group code assigned to this user.
ApprovalMinimum	Enter the minimum amount this user can approve.
HideInAccountSelect	Enter 'Yes' or 'No'. If 'yes', this customer account will be hidden from selection and account switching when the user logs onto your website.

Customer User CSV Template

User_Customer.csv

Fields for Customer User Records

If you're creating one yourself, copy and paste the following header fields into your file:

```
EmailAddress, CustomerCode, InitialRole, ApprovalLimit, OrderLimit, ReqLimit, ApprovalGroup,
ApprovalMinimum, HideInAccountSelect
```

Import User Id Changes

The process of bulk importing User Id changes to user records is similar to importing customer users.

These are the standard fields used for User Id changes:

Field Name	Field Description

Current User ID*	Current user ID (in most cases, the User ID is the user's email address)
New User ID*	New user ID
New Notify Email Address	Leave blank if the email address will remain the same

Update User Id CSV Template

User_ID.csv

Fields for User Customer Records

If you're creating one yourself, copy and paste the following header fields into your file:

```
Current User ID, New User ID, New Notify Email Address
```

Import Message

The import message will always show Line 1 (header line) as skipped.

File User_ID.csv uploaded successfully.
WARNING Line 1 Skipped. - Current User ID not an existing User - New Notification Email Address not a valid em
address.
SUCCESSFULLY UPDATED 1 User IDs. (Skipped 1).

Import User Deletions, Activations, Permanent Inactivations

The process of bulk importing user deletions, activations and permanent inactivations is similar to importing user customers. **NOTE -** A user can only be deleted from a specific customer account if they have no active orders and they are associated with more than one customer account.

These are the standard fields for changing user statuses:

Field Name	Field Description
EmailAddress*	Current user Id (in most cases, the User Id is the user's email address)
CustomerCode	Enter the customer code if you wish only to remove the user from this customer account. **NOTE -** You cannot enter a customer code and permanently inactivate a user at the same time.
IsPermanentlyInactive	Enter 'I' for Inactive and 'A' for Active. Leave blank if deleting user from a customer account via the CustomerCode field.

IsPermanentlyInactiveNote	If permanently inactivating the user, enter a note if you wish.

Delete, Activate, Permanently Inactivate Users CSV Template

The required CSV template is provided here or you can create one yourself.

Import_User_Status_Changes.csv

Fields for Deleting, Activating or Permanently Inactivating Customer Users

If you're creating one yourself, copy and paste the following header fields into your file:

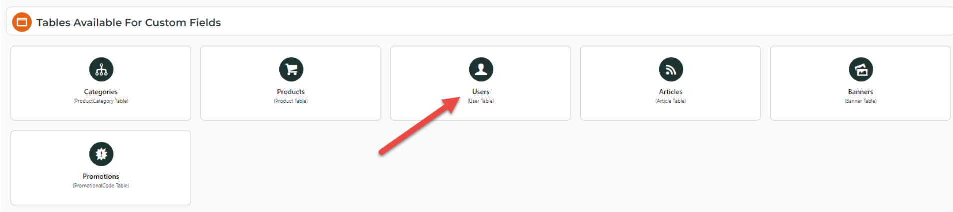
`EmailAddress, CustomerCode, IsPermanentlyInactive, IsPermanentlyInactiveNote`

Add a User Custom Field

Custom Fields

1. In the CMS, go to **E-Commerce Advanced Content Custom Fields**.

2. Select the **Users** table.



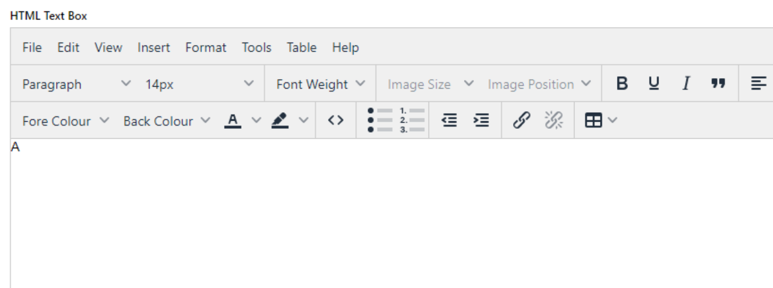
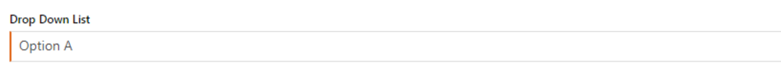
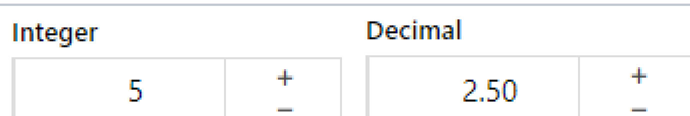
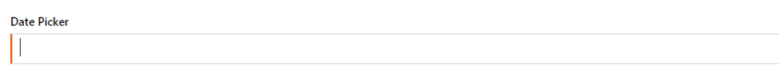
3. The page will load, displaying any existing custom fields for the User table.

4. Click the **Add New Custom Field** button.

5. In **Add Custom Field Details**, enter the field requirements (for display and entry of values by administrators):
    - **Field Name** - a code to identify this field in the database. Alphanumeric only, with no spaces or special characters. Underscore ('_ ') permitted.
    - **Prompt** - the field label displayed next to the field.
    - **Help** - additional information about the field displayed.
    - **Data Type**:
        - **Text** - alphanumeric characters, including spaces, special characters, and html.
        - **Integer** - whole numbers
        - **Decimal** - numeric data including fractional components
        - **DateTime** - calendar dates and times
        - **Boolean** - toggle for a 2 value option, e.g. True/False, Yes/No

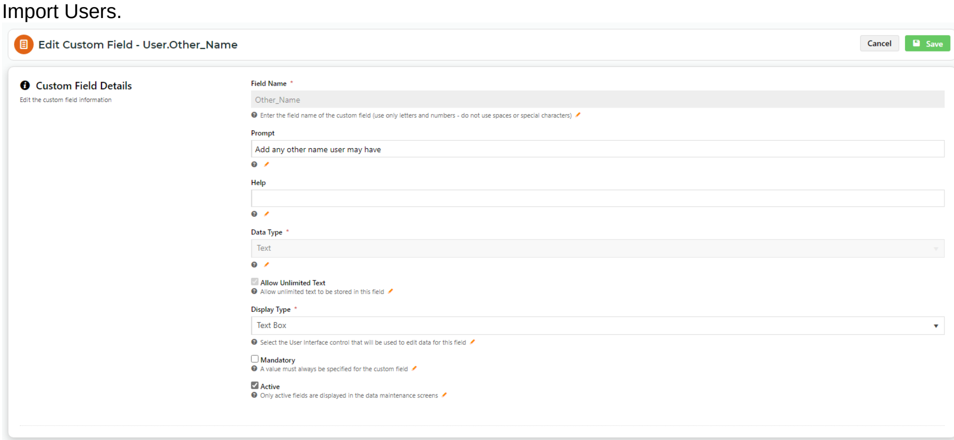
- **Display Type** - the interface displayed to Administrators on the page the field appears in. **NOTE** - Display Type options depend on the Data Type selected.

> **What is...**
>
> - **integer -** a whole number
> - **boolean** - functionality that only has two possibilities: ON or OFF, YES or NO etc

Display Type	Available for Data Type	Example
Text Box	Text, Integer, Decimal	One line text box
Multi-line Text Box	Text	
HTML Text Box	Text	WYSIWYG content editor that allows the text to be formatted 
XML Text Box	Text	
Dropdown List	Text, Integer, Decimal	
Image Selector	Text	
Numeric Text Box	Integer, Decimal	
Date Picker	DateTime	
Time Picker	DateTime	
Date/Time Picker	DateTime	
Check box (toggle)	Boolean	 **NOTE -** displays as a toggle

- **Allow Unlimited Text** - (for Text Display Type only) tick to allow unlimited amount of text

- **Mandatory** - tick to make the custom field required on the page it displays in.
- **Active** - leave ticked for the field to be in use. Untick to make inactive. **NOTE -** The field must be active for use with Import Users.



  - **Save** the custom field. You can view the field on the **Website Users Maintenance** page for a user. Add the field to your CSV file by entering the 'CUS_' before the Field Name as a new column header. Example: for custom field 'testfield', enter it in the CSV file as 'CUS_testfield'.

Related help

- B2B User Registration
- Create Users to Approve Report
- Website User Maintenance for Account Admins
- Website User Roles
- Website User Maintenance in CMS

- Custom Fields
- Customisation Resources
- Add Custom Fields To Products and Categories