

APPARELMAGIC CLOUD KNOWLEDGE BASE

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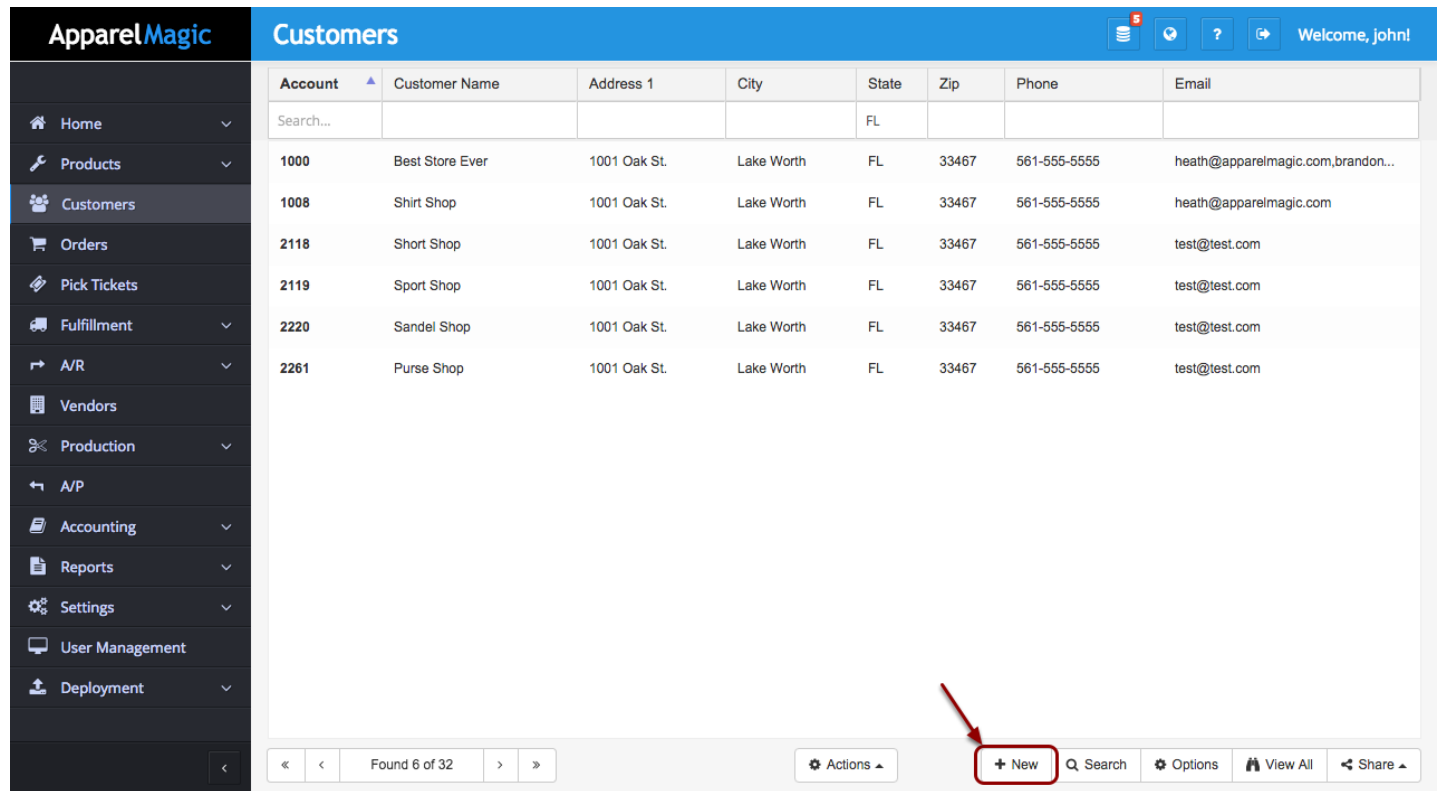
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Customers

Creating a Customer

Click the NEW button at the bottom of the Customers List



The screenshot shows the ApparelMagic interface with a sidebar on the left containing navigation links: Home, Products, Customers, Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, User Management, and Deployment. The main area displays a table titled 'Customers' with columns: Account, Customer Name, Address 1, City, State, Zip, Phone, and Email. The table contains six rows of customer data. At the bottom of the table, there is a pagination bar showing 'Found 6 of 32' and a '+ New' button, which is highlighted by a red arrow. Other buttons in the bottom bar include Actions, Search, Options, View All, and Share.

Account	Customer Name	Address 1	City	State	Zip	Phone	Email
1000	Best Store Ever	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	heath@apparelmagic.com,brandon...
1008	Shirt Shop	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	heath@apparelmagic.com
2118	Short Shop	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	test@test.com
2119	Sport Shop	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	test@test.com
2220	Sandel Shop	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	test@test.com
2261	Purse Shop	1001 Oak St.	Lake Worth	FL	33467	561-555-5555	test@test.com

Enter the Customer Name (Required) and other basic information

The screenshot shows the 'New Customer' form in the ApparelMagic system. The 'Customer Information' tab is selected. The 'NAME *' field is highlighted with a red box, indicating it is a required field. The form contains the following fields and values:

Field	Value
NAME *	Best Store Ever
ADDRESS	384 Best Lane
ADDRESS 2	
CITY	New York
STATE	NY
ZIP CODE	29484
COUNTRY	USA
CATEGORY	Apparel
AR ACCOUNT	1100 AR - House
DIVISION	Eastern
BUYER FILTER	
DISCOUNT	0.00%

You can set the Address, Category, AR Account, Division, Buyer Filter, and Discount here. These can also be edited in the Customer Overview screen.

Required Fields

Name: The name of the business / customer you are selling to. This name must be unique.

Enter the Customer Credit information

The screenshot shows the 'New Customer' form in the ApparelMagic application. The left sidebar contains a navigation menu with items: Home, Products, Customers (selected), Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, and User Management. The main content area is titled 'New Customer' and has a blue header bar with the ApparelMagic logo and a 'Welcome, am tech!' message. Below the header, there are two tabs: 'Customer Information' and 'Credit Information'. The 'Credit Information' tab is active, showing four fields: CURRENCY (USD), CREDIT STATUS (Pending), CREDIT LIMIT (\$0.00), and CREDIT TERMS. At the top right of the form, there are three buttons: 'Cancel', 'Prev', and 'Finish'. The 'Finish' button is highlighted with a red rectangle.

Field	Value
CURRENCY	USD
CREDIT STATUS	Pending
CREDIT LIMIT	\$0.00
CREDIT TERMS	

Here you can set the Currency for this customer, the Credit Status, Credit Limit, and Credit Terms. These can also be edited in the Customer Overview screen.

Note

These fields will act as defaults for orders, but many fields can be overridden at the order entry level such as Credit Status, Currency, and Credit Terms.

Customer Overview

The Overview tab displays general information for a customer.

Fields

The screenshot shows the 'Customer Overview' form for 'Customer 1000'. The form is organized into several sections:

- Header:** Displays the customer's name 'Best Store Ever', category 'Middle Atlantic', division 'TestMen', and credit status 'Approved'.
- Navigation:** A sidebar on the left lists various modules like Home, Products, Customers, Orders, etc. The top navigation bar includes tabs for Overview, Accounting, Locations, People, Events, Salespeople, Files, Open Orders, Unpaid Invoices, and Unapplied Credit Memos.
- Form Fields:**
 - NAME:** Best Store Ever
 - ADDRESS:** 1001 Oak St.
 - ADDRESS 2:** Apartment 2
 - CITY:** Lake Worth
 - STATE:** FL
 - ZIP:** 33467
 - COUNTRY:** US
 - PHONE:** 561-555-5555
 - EMAIL:** apparelmagic@apparelmagic.com
 - WEBSITE:** (empty field)
 - SHIP VIA:** UPS Ground
 - DIVISION:** TestMen
 - CATEGORY:** Middle Atlantic
 - BUYER FILTER:** Wholesale
 - ACTIVE:** ☒
 - FIRST NAME:** asd
 - LAST NAME:** (empty field)
 - EXTERNAL ID:** 32192287
 - NOTES:** (empty text area)
 - SHIPPING INSTRUCTIONS:** test
- Footer:** Includes navigation arrows, an 'Actions' dropdown, and 'Save' and 'List' buttons.

Division: (configure under Settings > Divisions) Used to specify which section of your company a customer orders from.

Category: Used to group styles together for searching/organization purposes.

Buyer Filter: Controls the customers (through B2B access) and salespeople (through sales-rep access) that can view groups of products. (Also configured at the product level).

External ID: (Configure under Settings > Plugins > Authorize) Used for the Authorize.Net integration. The External ID allows you to properly link your customer records in ApparelMagic Cloud with your customer records in Authorize.Net. Generally this is filled in for you automatically by the sync command.

Notes, Shipping Instructions: Used for transaction printouts.

Customer Accounting

Configure accounting defaults for this customer

Customer 1000

1

?

AM Tech

NAME

Best Store Ever

CATEGORY

Buyer

DIVISION

Southern

CREDIT STATUS

Approved

Overview

Accounting

Locations

People

Events

Salespeople

Files

Open Orders

Unpaid Invoices

Unapplied Credit Memos

ACCOUNTING DEFAULTS

CREDIT STATUS

Approved

CREDIT LIMIT

£75,000.00

CURRENT AR BALANCE

£27,326.85

AVAILABLE CREDIT

£47,673.15

CREDIT TERMS

DISCOUNT

5.0000%

AR ACCOUNT

1100 AR - House

×

PRICE GROUP

Wholesale

×

CURRENCY

EUR

×

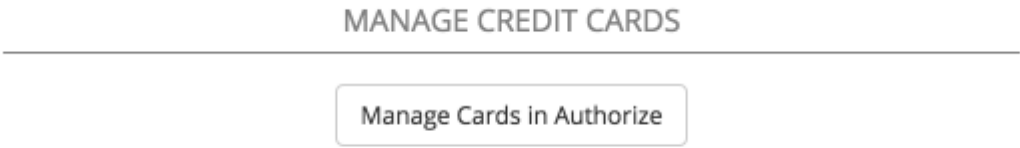
MANAGE CREDIT CARDS

Manage Cards in Authorize

Price Group: After assigning a Price Group to the customer, you can assign a price to that group under each product record.

Currency: This will automatically be specified on future transactions for the customer. You can override the currency on a transaction if needed.

Managing External Credit Cards

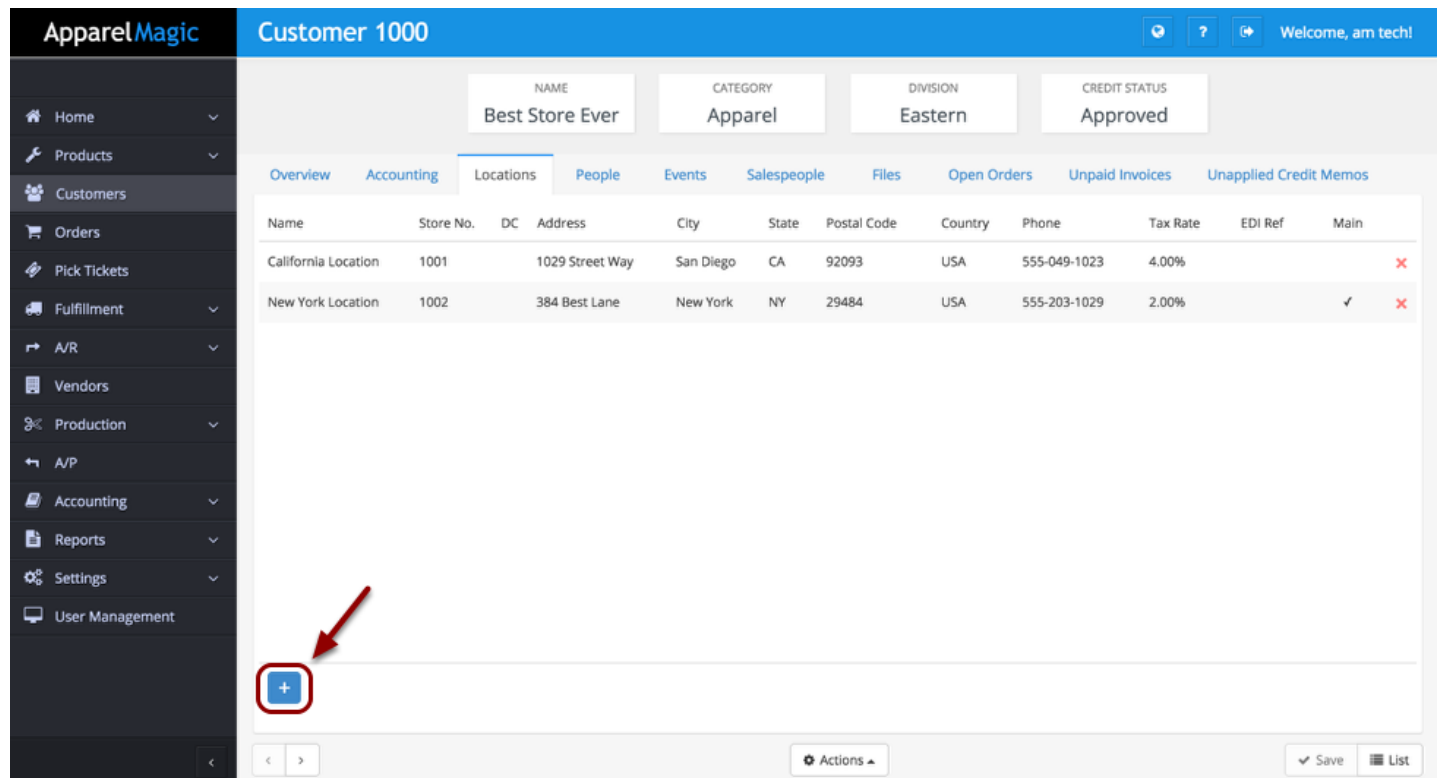


In the same interface, the right section can be used to manage externally stored credit cards associated with this customer. Only those gateways that have been enabled inside of the system will appear in this section.

Customer Locations

Use the Locations tab to add alternate Ship To locations for your customers.

Create a New Location



The screenshot shows the ApparelMagic interface for Customer 1000. The left sidebar contains navigation links: Home, Products, Customers, Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, and User Management. The main content area has tabs for Overview, Accounting, Locations, People, Events, Salespeople, Files, Open Orders, Unpaid Invoices, and Unapplied Credit Memos. The Locations tab is active, displaying a table with columns: Name, Store No., DC, Address, City, State, Postal Code, Country, Phone, Tax Rate, EDI Ref, and Main. Two locations are listed: California Location (Store No. 1001, Address 1029 Street Way, San Diego, CA 92093, USA, Phone 555-049-1023, Tax Rate 4.00%) and New York Location (Store No. 1002, Address 384 Best Lane, New York, NY 29484, USA, Phone 555-203-1029, Tax Rate 2.00%). A red arrow points to a plus sign icon in the bottom left corner of the table area, indicating where to click to add a new location.

Name	Store No.	DC	Address	City	State	Postal Code	Country	Phone	Tax Rate	EDI Ref	Main
California Location	1001		1029 Street Way	San Diego	CA	92093	USA	555-049-1023	4.00%		✗
New York Location	1002		384 Best Lane	New York	NY	29484	USA	555-203-1029	2.00%		✓ ✗

Select the plus sign in the bottom left hand corner to add a new location.

A new window will appear to enter the new location

The screenshot shows the ApparelMagic interface with a 'Ship To' modal form open. The form is titled 'Ship To' and contains the following fields:

- NAME: Texas Location
- STORE NO.: 1003
- DC: (empty)
- ADDRESS: 193 Warehouse Street
- ADDRESS 2: (empty)
- CITY: Austin
- STATE: TX
- POSTAL CODE: 73301
- COUNTRY: USA
- PHONE: 555-222-3234
- TAX RATE: 8.00%
- EDI REF: (empty)
- MAIN LOCATION: ☐

At the bottom of the modal are 'Cancel' and 'Ok' buttons. The background interface shows the 'Customer 1000' page with a list of locations: California Location and New York Location. A table on the right shows 'CREDIT STATUS' with columns for Tax Rate, EDI Ref, and Main.

Tax Rate	EDI Ref	Main
9-1023	4.00%	✗
3-1029	2.00%	✓

On future orders and transactions, you can select from these locations to specify where you want to ship the order.

DC: Distribution Center, used if you have store locations that go through a Distribution Center. The value is not often used and is normally a number.

Main Location: Allows for setting of a default location

Customer Location List

ApparelMagic

Home

Products

Customers

Customers

Locations

People

Orders

Pick Tickets

Fulfillment

A/R

Vendors

Production

A/P

Accounting

Reports

Settings

User Management

Deployment

Customer Locations

AM Tech

Customer	Location	Address 1	City	State	Zip	Phone	Email
Best Store Ever							
Best Store Ever	BSE #1	15541 EAST GALE AVE	CITY OF INDUSTRY	CA	91745	555-555-5555	
Best Store Ever	BSE #3	4130 GANDY BLVD	TAMPA	FL	33611	561-483-3984	
Best Store Ever	BSE #2	301 GOVERNORS HIGHWAY	SOUTH WINDSOR	CT	06074		

Found 3 of 4151

Actions

Search

Options

View All

Share

Customer People

The People tab allows you to keep all your contacts for a customer in one accessible place.

Create a new person

NAME

Best Store Ever

CATEGORY

Middle Atlantic

DIVISION

Men

CREDIT STATUS

Approved

Overview

Accounting

Locations

People

Events

Salespeople

Files

Open Orders

Unpaid Invoices

Unapplied Credit Memos

First Name	Last Name	Position	Phone	Fax	Email	Main Contact	Send Email	Web Access
Sally	Shipper	Receivables			sally@shippingsolutions.biz		✓	✗
Bobby	Ricketts	Billing			billing@bse.com		✓	✗

+

Select the plus sign in the bottom left hand corner to add a new person.

A new window will appear to enter the person's information

People

FIRST NAME	<input type="text" value="Bobby"/>
LAST NAME	<input type="text" value="Ricketts"/>
POSITION	<input type="text" value="Billing"/>
PHONE	<input type="text"/>
FAX	<input type="text"/>
EMAIL	<input type="text" value="billing@bse.com"/>
MAIN CONTACT	<input type="checkbox"/>
SEND EMAIL	<input checked="" type="checkbox"/>
WEB ACCESS	<input type="checkbox"/>

Main Contact: The Main Contact for a customer is used for transaction printouts.

Send Email: This flag designates that this person should be included, by default, on all emails sent to this company.

Web Access: Used to give customers access to ApparelMagic Cloud to view products and orders directly in the system.

Customer People List

ApparelMagic

Customer Contacts

AM Tech

Customer	First Name	Last Name	Position	Phone	Fax	Email
Best Store Ever						
Best Store Ever	John	Smith	CEO			
Best Store Ever	Designated	Buyer	Associate	555-555-5555	111-111-1111	purchases@beststoreever.com

<

<<

>

>>

Found 2 of 9

Actions

Search

Options

View All

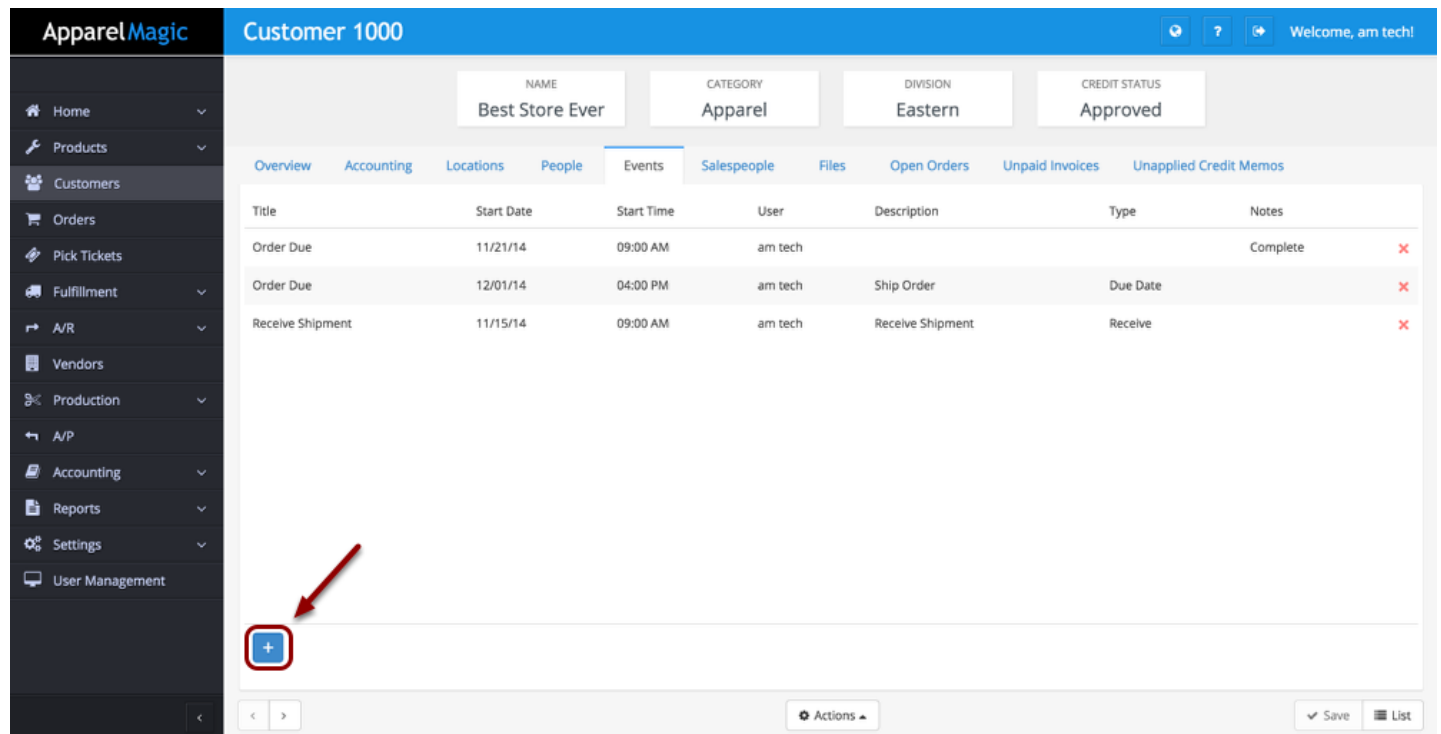
Share

You may also view a list of all people entered in the system by navigating to Customers > People. This information can be sorted, filtered, exported, and imported into from this list.

Customer Events

Keep track of all the events associated with the customer.

Add a new event



The screenshot shows the ApparelMagic interface for Customer 1000. The left sidebar contains navigation links: Home, Products, Customers, Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, and User Management. The main header displays filters for NAME (Best Store Ever), CATEGORY (Apparel), DIVISION (Eastern), and CREDIT STATUS (Approved). Below this is a tabbed interface with tabs for Overview, Accounting, Locations, People, Events, Salespeople, Files, Open Orders, Unpaid Invoices, and Unapplied Credit Memos. The Events tab is active, showing a table with columns: Title, Start Date, Start Time, User, Description, Type, and Notes. The table contains three rows of data:

Title	Start Date	Start Time	User	Description	Type	Notes
Order Due	11/21/14	09:00 AM	am tech			Complete
Order Due	12/01/14	04:00 PM	am tech	Ship Order	Due Date	
Receive Shipment	11/15/14	09:00 AM	am tech	Receive Shipment	Receive	

At the bottom left of the table area, there is a blue square button with a white '+' sign, which is highlighted by a red circle and a red arrow. This button is used to add a new event. At the bottom right, there are buttons for 'Save' and 'List', and an 'Actions' dropdown menu.

To create a new event, simply click the '+' button in the bottom left hand corner.

A new window will appear to enter the new event

The screenshot shows the ApparelMagic Cloud interface for Customer 1000. A modal window titled "Events" is open, allowing the user to create a new event. The modal contains the following fields:

- EVENT TITLE *: Send shipment
- START DATE *: 05/06/2015
- END DATE: 05/06/2015
- START TIME: 10:00 AM
- END TIME: 05:00 PM
- USER: am tech
- STYLE: (empty)
- DESCRIPTION: (empty)
- ORDER ID: 1060
- INVOICE ID: (empty)
- TYPE: Due Date

Below these fields is a "NOTES" section with a text area. At the bottom right of the modal are "Cancel" and "Ok" buttons.

The background interface shows the "Customer 1000" overview page with a sidebar menu on the left containing options like Home, Products, Customers, Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, and User Management. The main content area displays a table with columns for Title, Order Due, and Receive Shipment. A "CREDIT STATUS" section shows "Approved".

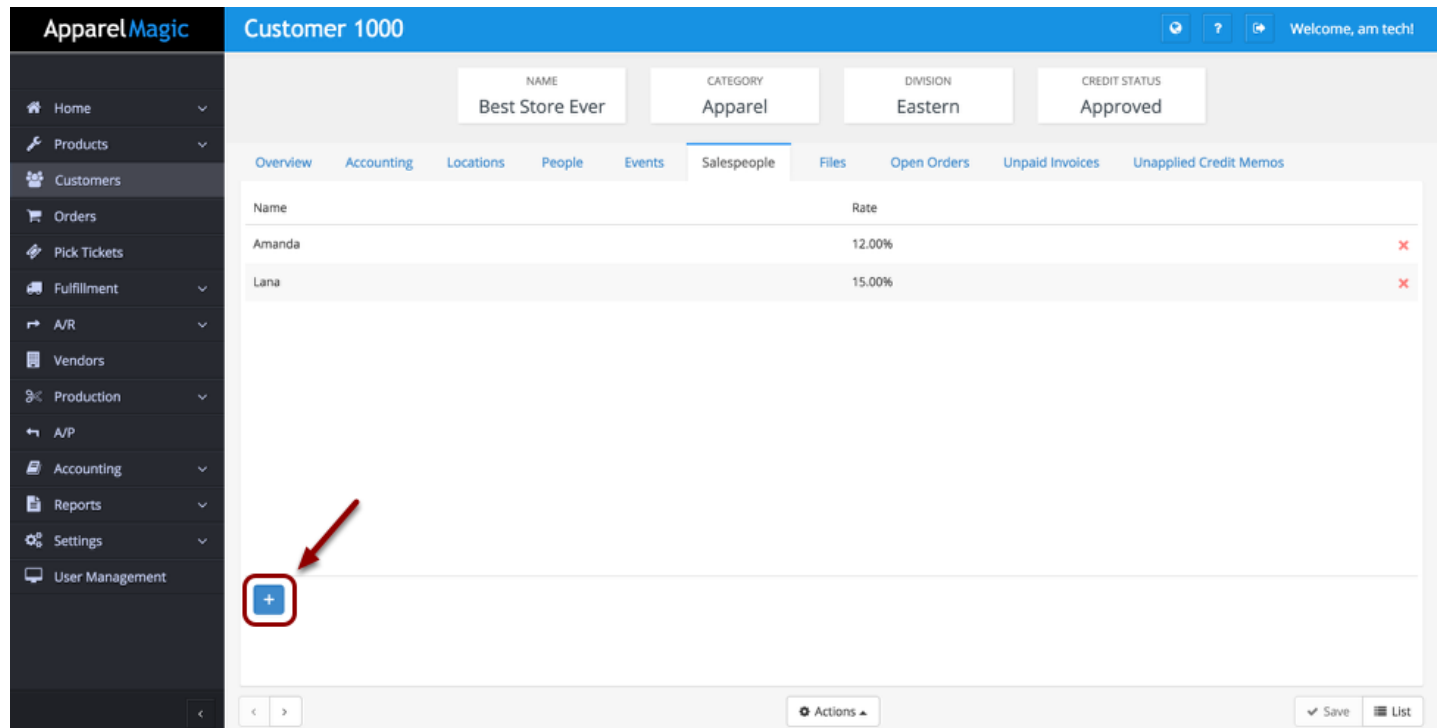
Type: Used to categorize events

Style, Order ID, Invoice ID: Associate a Style, Order, or Invoice with the event.

Customer Salespeople

Any salesperson assigned under this tab will automatically be added to all future orders and invoices for this customer

Create a new salesperson



The screenshot shows the ApparelMagic interface for Customer 1000. The left sidebar contains navigation links: Home, Products, Customers, Orders, Pick Tickets, Fulfillment, A/R, Vendors, Production, A/P, Accounting, Reports, Settings, and User Management. The main content area is titled 'Customer 1000' and includes filters for NAME (Best Store Ever), CATEGORY (Apparel), DIVISION (Eastern), and CREDIT STATUS (Approved). Below these are tabs for Overview, Accounting, Locations, People, Events, Salespeople, Files, Open Orders, Unpaid Invoices, and Unapplied Credit Memos. The Salespeople tab is active, displaying a table with columns Name and Rate. The table lists Amanda (12.00%) and Lana (15.00%). A red arrow points to a plus sign icon in the bottom left corner of the Salespeople list area, indicating where to click to add a new salesperson.

Name	Rate
Amanda	12.00%
Lana	15.00%

Select the plus sign in the bottom left hand corner to add a new sales person.

Enter the salesperson's default values for this customer

The screenshot shows the ApparelMagic interface for Customer 1000. A modal window titled "Company Salespeople" is open, allowing the user to set default values for a salesperson. The modal contains two fields: "SALESPERSON" with a dropdown menu showing "Patrick" and a clear button (x), and "COMMISSION RATE" with a text input field showing "5.00%". At the bottom right of the modal are "Cancel" and "Ok" buttons. The background interface shows a sidebar with navigation options like Home, Products, Customers, Orders, etc. The main area displays a table of salespeople with columns for Name and Commission Rate. The table has two rows: Amanda and Lana, with Lana having a commission rate of 15.00%. The bottom of the interface includes an "Actions" button and "Save" and "List" buttons.

Name	Commission Rate
Amanda	
Lana	15.00%

The default commission rate will be pulled from the Salesperson record under Settings > Dictionaries > Salespeople but you can override the commission rate if needed.

Customer Salespeople List

ApparelMagic

Home

Products

Customers

Customers

Locations

People

Salespeople

Orders

Pick Tickets

Fulfillment

A/R

Vendors

Production

A/P

Accounting

Reports

Settings

User Management

Deployment

Customer Salespeople

Customer

Salesperson

Rate

Best Store Ever

Best Store Ever

Sales

12.00%

Found 1 of 16

Actions

Search

Options

View All

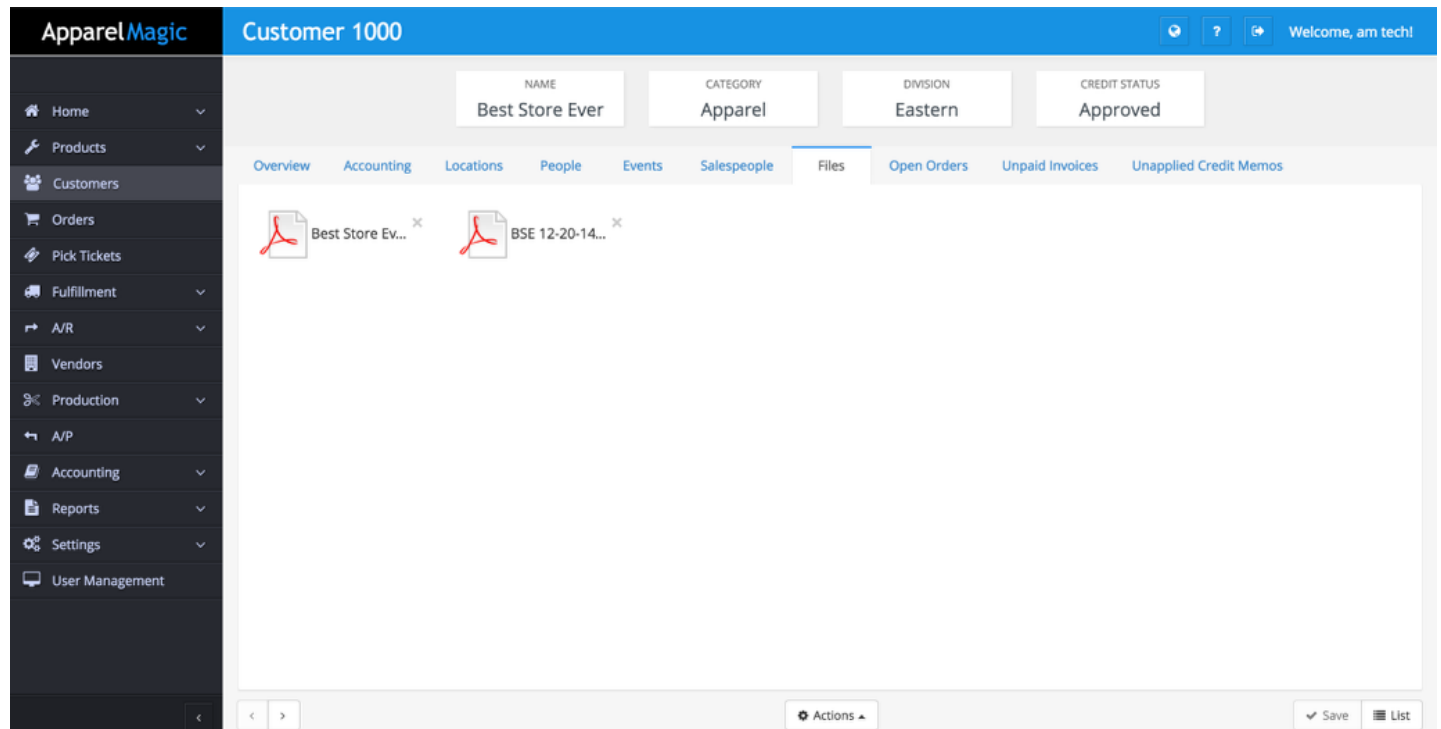
Share

You may also view a list of all salespeople assigned as a default to customers in the system by navigating to Customers > Salespeople. This information can be sorted, filtered, exported, and imported into from this list.

Customer Files

Once the DropBox plugin has been set up, you can drag and drop files to the Files tab to be linked with the customer.

Simply drag and drop files to link them with the customer.



Related Transactions

View transactions related to the customer.

Related Transaction Tabs

ApparelMagic

Customer 1000

HomeProductsCustomersOrdersPick TicketsFulfillmentA/RVendorsProductionA/PAccountingReportsSettingsUser Management

NAMEBest Store EverCATEGORYApparelDIVISIONEasternCREDIT STATUSApproved

OverviewAccountingLocationsPeopleEventsSalespeopleFilesOpen OrdersUnpaid InvoicesUnapplied Credit Memos

NAMEBest Store Ever

ADDRESS384 Best Lane

ADDRESS 2

CITYNew York

STATENY

ZIP29484

COUNTRYUSA

PHONE555-375-8538

EMAILorders@beststoreever.com

WEBSITEwww.bse.com

DIVISIONEastern

CATEGORYApparel

BUYER FILTERHigh End

ACTIVE

FIRST NAME

LAST NAME

EXTERNAL ID

NOTES

SHIPPING INSTRUCTIONS

Handle with care.

<>

Actions

SaveList

These tabs allow you to get a quick look at the most important transactions related to your customers.

Importing Customers

ApparelMagic Cloud offers the ability to import your customers from a spreadsheet.

Run the Import Customers command

The screenshot shows the ApparelMagic interface with the 'Customers' list. A context menu is open over the row for 'Jeff Schmidt - test@email...' (Account 1009). The menu options are: Delete, Import, Export, Sync With..., Un-Sync With..., and Mass Replace. The 'Import' option is highlighted. A red circle with the number '1' points to the 'Actions' button at the bottom of the table. A red circle with the number '2' points to the 'Import' option in the context menu. A red circle with the number '3' points to the 'Customers' link in the sub-menu.

Account	Customer Name	Address 1	City	State	Zip	Phone	Email	Category	Division
1000	Best Store Ever	384 Best Lane	New York	NY	29484	555-375-8538	orders@beststoreever.com	Apparel	Eastern
1001	Boutique Store	1000 State Street	Columbus	OH	43215	555-306-0465	orders@boutiquestore.com	Apparel	Eastern
1002	Shirts, Shorts, and Shoe...	1000 State Street	Oakland	CA	94607	555-712-7391	orders@sssohmy.com	Apparel	Eastern
1003	The Dress Store	4239 Street Lane	San Luis Obispo	CA	93401	555-739-7204	sales@tds.com	Apparel	Eastern
1004	Tropical Clothing Design	7495 Place Blvd	Los Angeles	CA	90244	555-677-9352	orders@tropicaldesign.c...	Apparel	Eastern
1005	Retail Store	4659 Place Street	Salt Lake City	UT	84116	555-440-4665	orders@retailstore.com	Apparel	Eastern
1006	Men's Shirt Store	1455 West Pine Road	Wellington	Florida	33411	555-812-4758	orders@mensshirts.com	Apparel	Eastern
1007	Jerry's Socks	555 Main St.	Kansas City				erocks.com	Wholesale	Eastern
1009	Jeff Schmidt - test@email...	34 Park Way	West Palm				hmidt - test@email...		Eastern
1019	Main Street Apparel								Eastern
1020	My Favorite Store							Apparel	Eastern

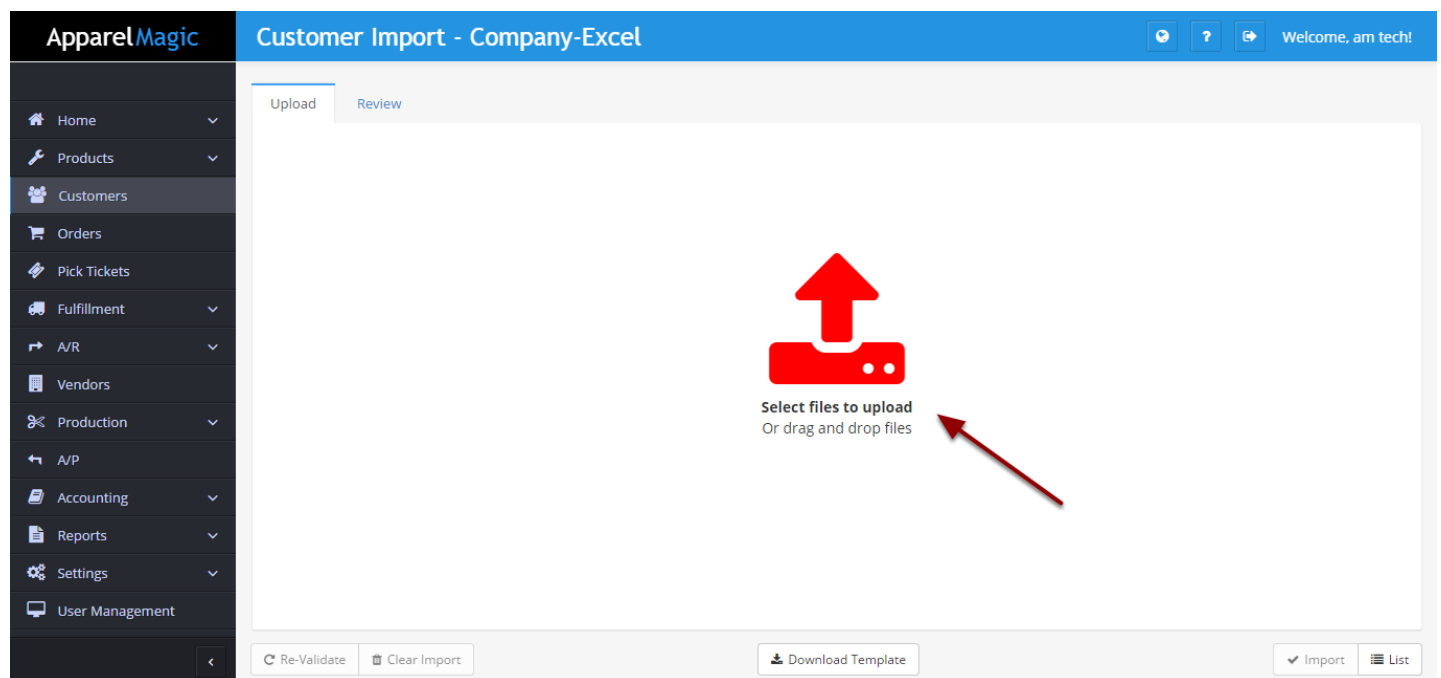
Download the Customer template using the button below

The screenshot shows the 'Customer Import - Company-Excel' page in ApparelMagic. The page has two tabs: 'Upload' and 'Review'. The 'Upload' tab is active. In the center of the page is a large red arrow pointing upwards, with the text 'Select files to upload' and 'Or drag and drop files' below it. At the bottom of the page, there is a red box around the 'Download Template' button. Other buttons at the bottom include 'Re-Validate', 'Clear Import', 'Import', and 'List'.

Modify the Template to include the Customer Information you are trying to import

In this step, you should remove the sample data in the template and replace it with the customer information you are trying to import. Make sure that you do not re-arrange or change any of the columns in the existing spreadsheet, or you will receive an error when attempting to import this information.

Drag and Drop the customer file on to the screen below



Review the information displayed in the Review tab

The screenshot shows the 'Customer Import - Company-Excel' interface in the ApparelMagic system. The 'Review' tab is active, displaying a table with customer data. The table has columns for Customer, Type, Division, Address 1, Address 2, City, State, Zip, Country, Phone, Email, and Error. A single row of data is visible: Best Store Ever, Customer, Eastern, 384 Best Lane, New York, NY, 29484, USA, 555-375-8538, orders@beststoreever.com. At the bottom, there are buttons for 'Re-Validate', 'Clear Import', 'Download Template', 'Import', and 'List'.

Customer	Type	Division	Address 1	Address 2	City	State	Zip	Country	Phone	Email	Error
Best Store Ever	Customer	Eastern	384 Best Lane		New York	NY	29484	USA	555-375-8538	orders@beststoreever.com	

Click Import to finalize the process

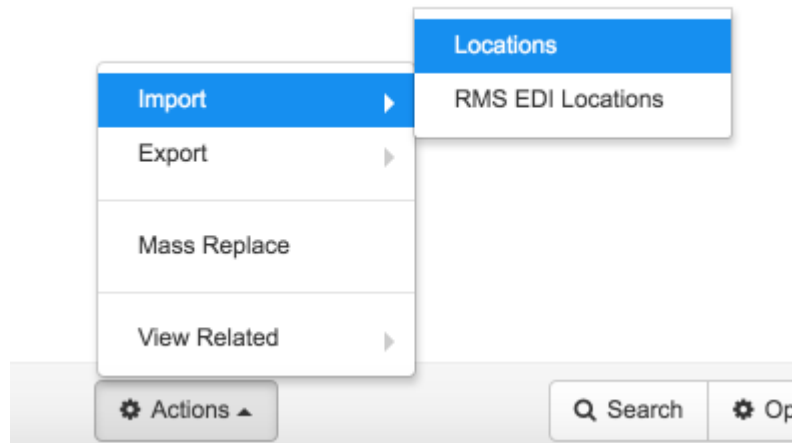
This screenshot is identical to the one above, but with a red arrow pointing to the 'Import' button at the bottom right of the interface, indicating the final step to complete the import process.

Customer	Type	Division	Address 1	Address 2	City	State	Zip	Country	Phone	Email	Error
Best Store Ever	Customer	Eastern	384 Best Lane		New York	NY	29484	USA	555-375-8538	orders@beststoreever.com	

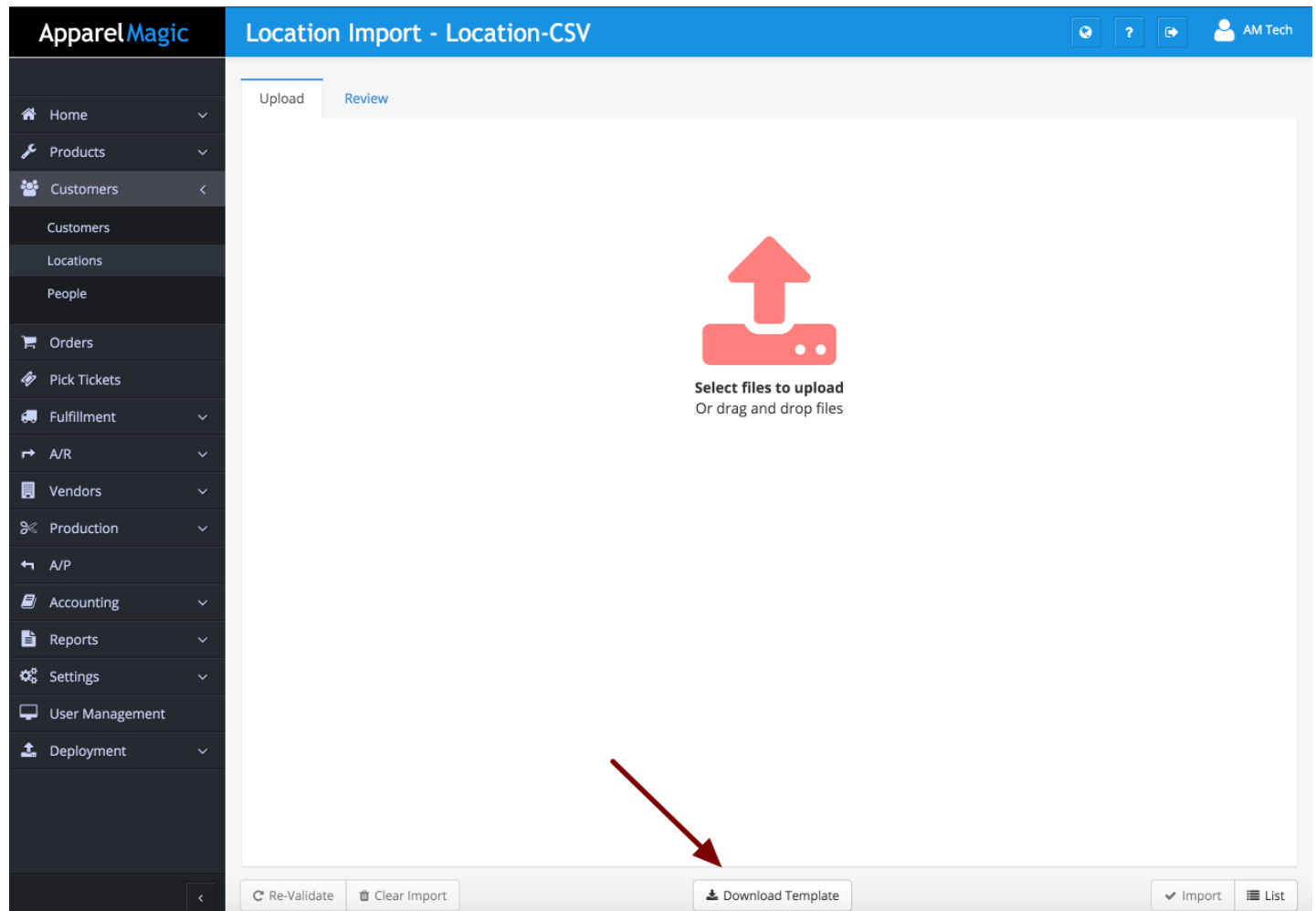
Importing Locations

ApparelMagic Cloud offers the ability to import your customer locations from a spreadsheet.

Run the Import Locations command



Download the Locations template using the button below



The Export > AM Template Format command can also be used to export location data for existing locations in the system, so you can modify and update these locations.

Modify the template to include the Location Information you are trying to import

In this step, you should remove the sample data in the template and replace it with the location information you are trying to import. Make sure that you do not re-arrange or change any of the columns in the existing spreadsheet, or you will receive an error when attempting to import this information.

Drag and drop the Location file on to the screen below

Location Import - Location-CSV

?

AM Tech

Upload

Review

locations.csv

Select files to upload

Or drag and drop files

Review the information displayed in the Review tab

Location Import - Location-CSV

AM Tech

Upload

Review

Type	Company	Location	Address 1	Address 2	City	State	Zip	Country	Store Number	DC	Phone	Error
Customer	Nordstro...	Store #41	Wonderf...	333 Los A...	Los Ange...	CA	90000	USA	414	9	213-456-...	

Click Import to finalize the process

ApparelMagic

Home

Products

Customers

Customers

Locations

People

Orders

Pick Tickets

Fulfillment

A/R

Vendors

Production

A/P

Accounting

Reports

Settings

User Management

Deployment

Location Import - Location-CSV

Upload

Review

Type	Company	Location	Address 1	Address 2	City	State	Zip	Country	Store Number	DC	Phone	Error
Customer	Nordstro...	Store #41	Wonderf...	333 Los A...	Los Ange...	CA	90000	USA	414	9	213-456-...	

Re-Validate

Clear Import

Download Template

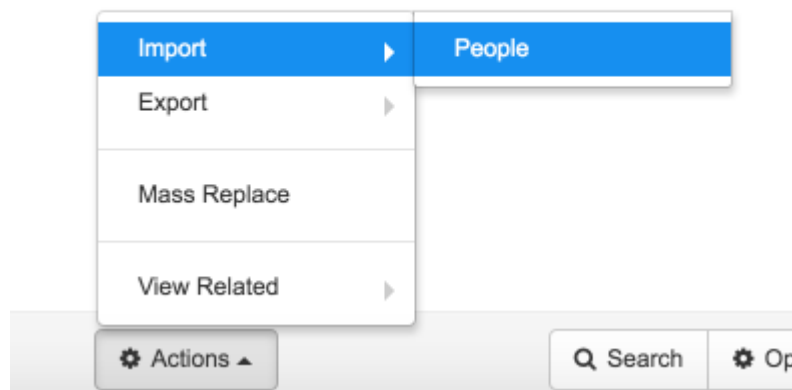
Import

List

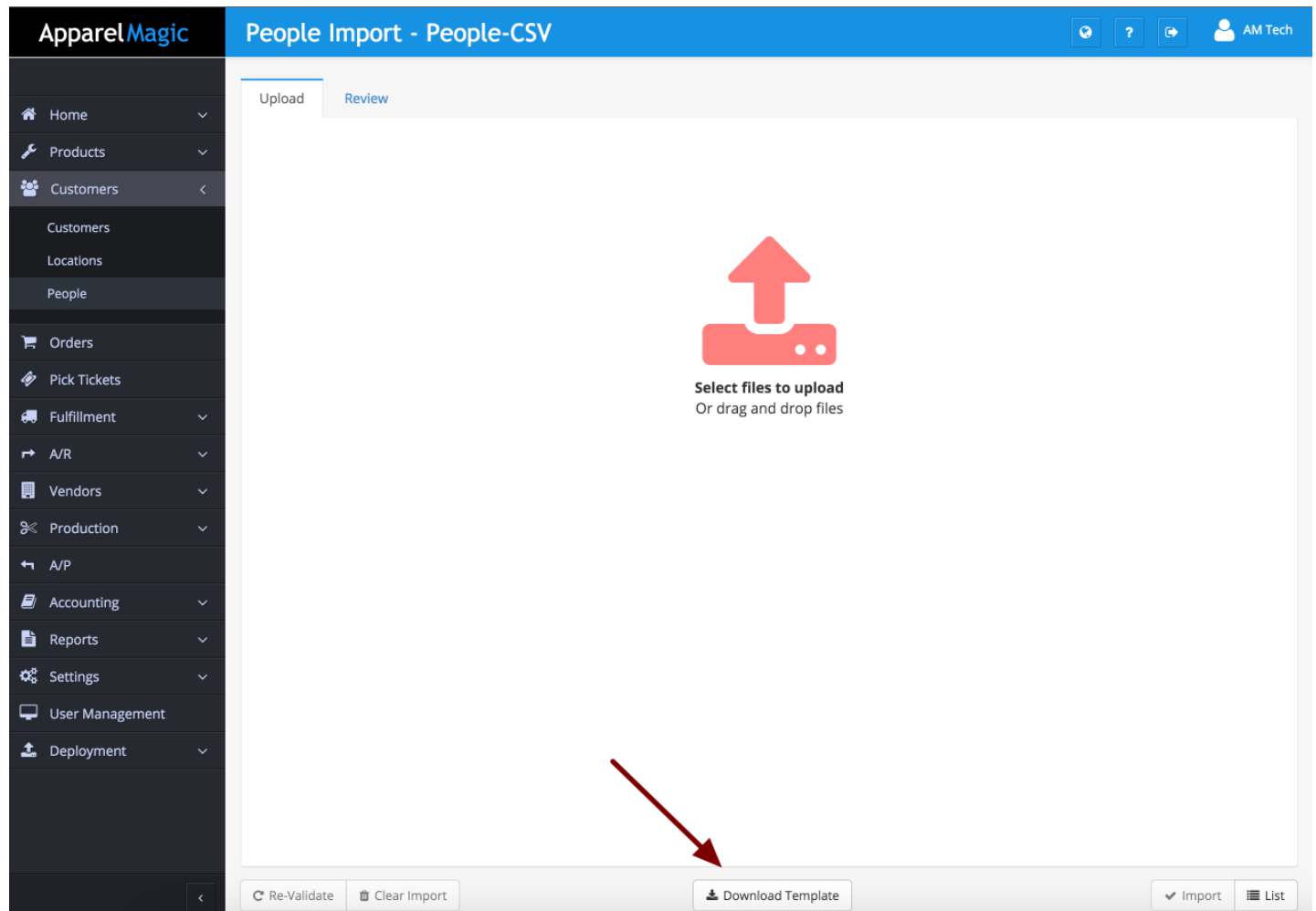
Importing People

ApparelMagic Cloud offers the ability to import your customer contacts from a spreadsheet.

Run the Import People command



Download the People template using the button below

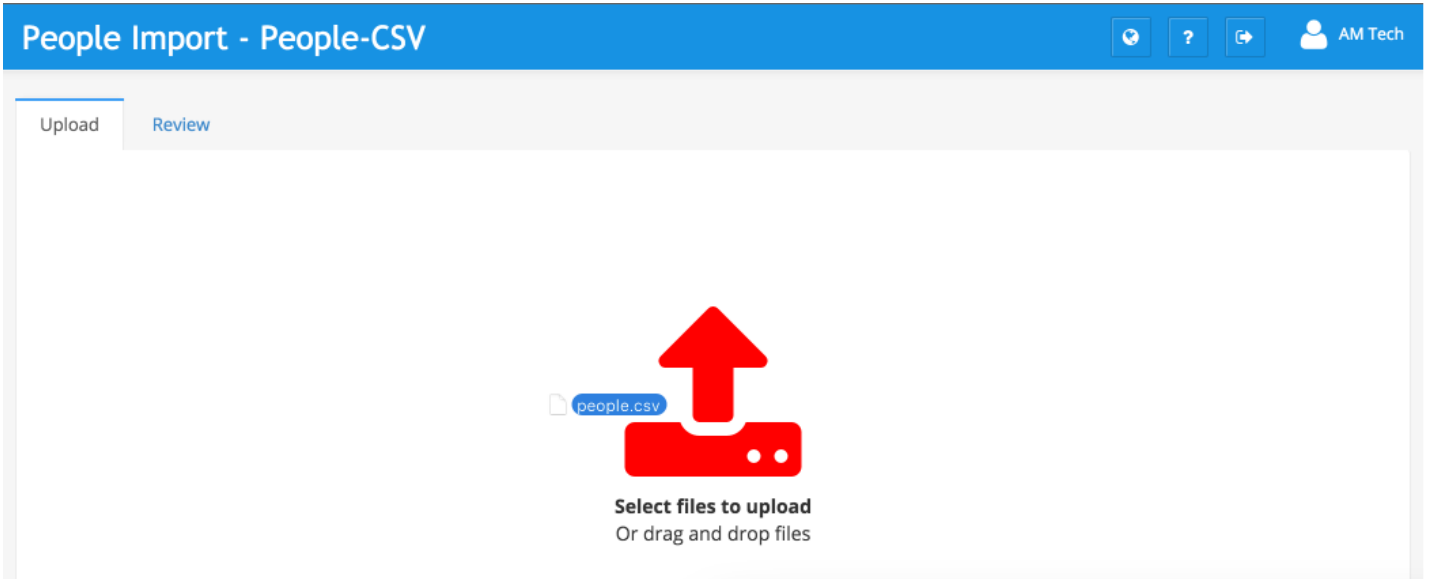


The Export > AM Template Format command can also be used to export contact data for existing people in the system, so you can modify and update these people.

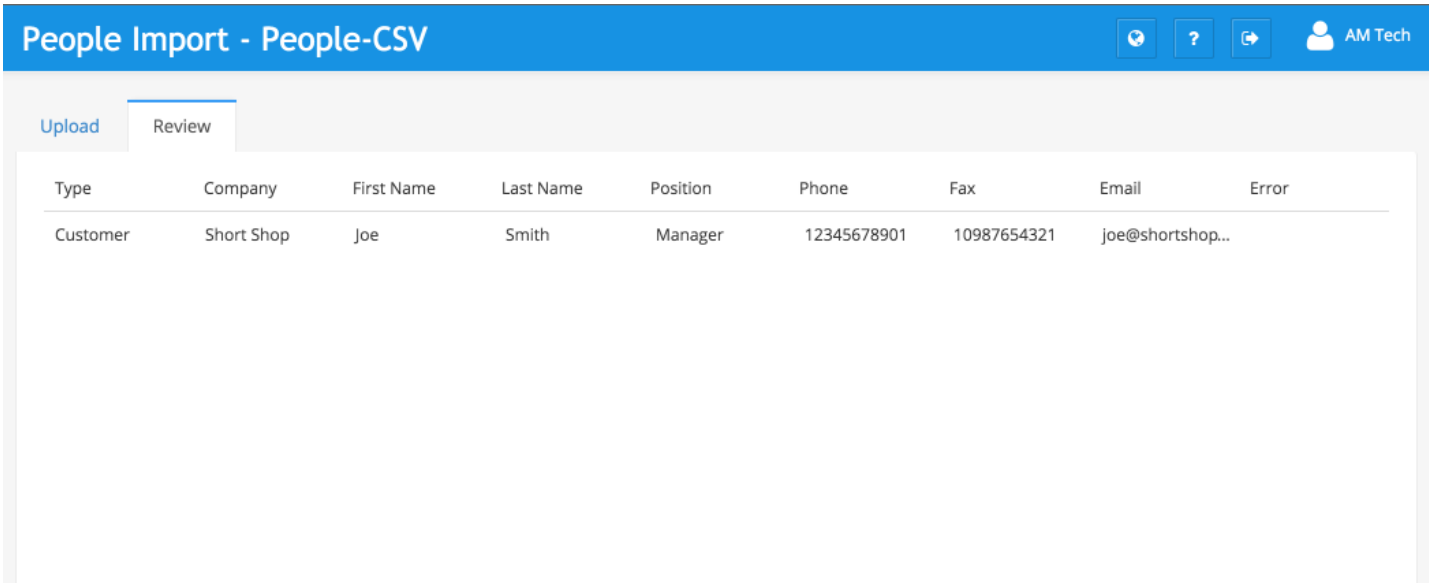
Modify the template to include the People you are trying to import

In this step, you should remove the sample data in the template and replace it with the contact information you are trying to import. Make sure that you do not re-arrange or change any of the columns in the existing spreadsheet, or you will receive an error when attempting to import this information.

Drag and drop the People file on to the screen below



Review the information displayed in the Review tab



Click Import to finalize the process

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People Import - People-CSV

Upload

Review

Type	Company	First Name	Last Name	Position	Phone	Fax	Email	Error
Customer	Short Shop	Joe	Smith	Manager	12345678901	10987654321	joe@shortshop...	

Re-Validate

Clear Import

Download Template

Import

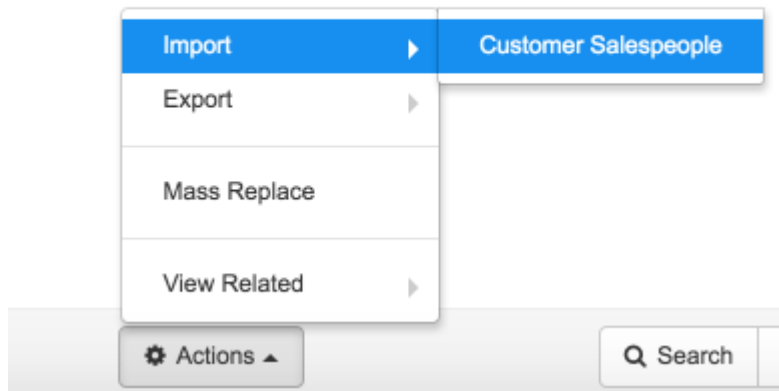
List



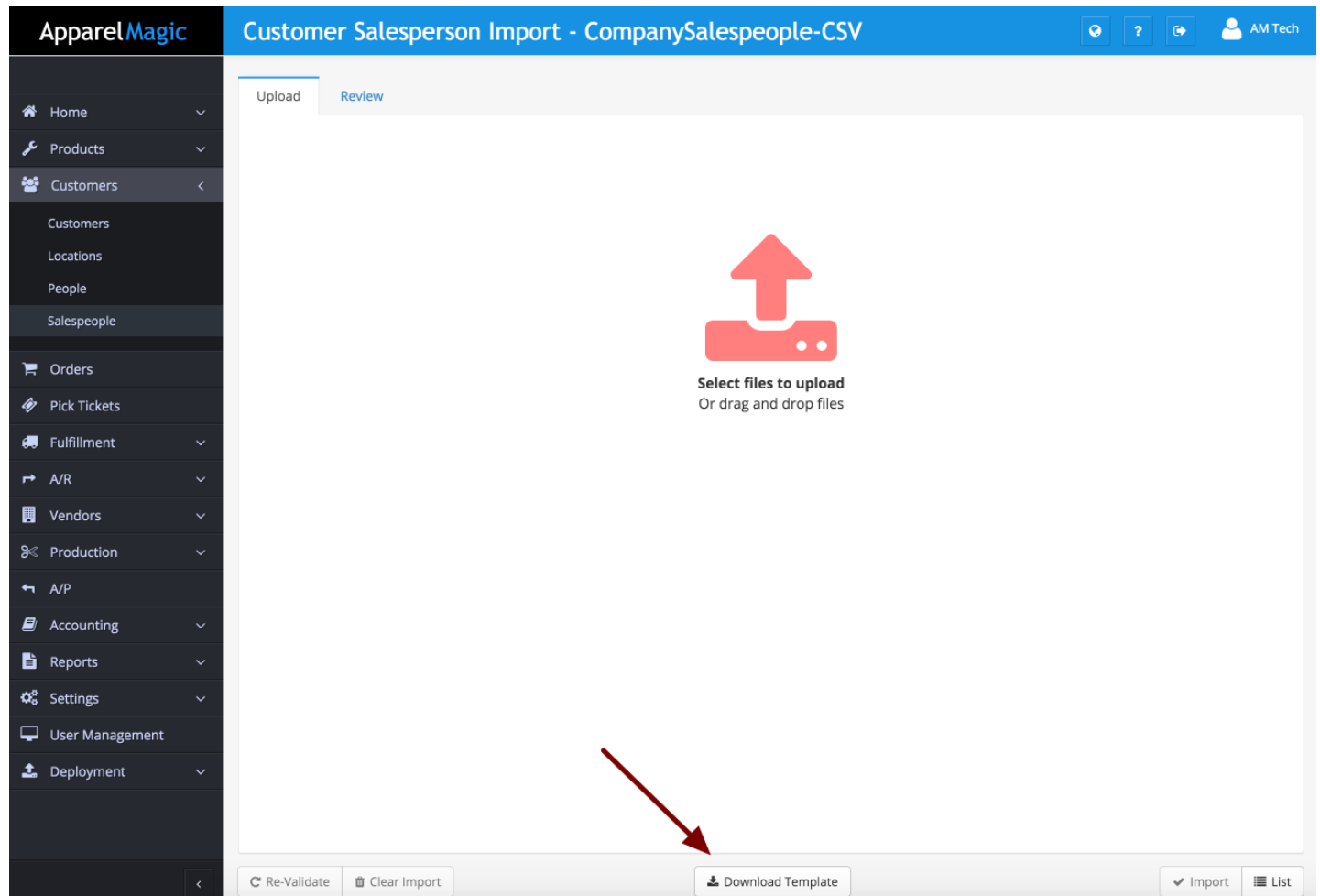
Importing Customer Salespeople

ApparelMagic Cloud offers the ability to import your customer's default salespeople from a spreadsheet.

Run the Import Customer Salespeople command



Download the Customer Salespeople template using the button below



The Export > AM Template Format command can also be used to export contact data for existing people in the system, so you can modify and update these assigned default salespeople.

Modify the template to include the Customer Salespeople defaults you are trying to import

In this step, you should remove the sample data in the template and replace it with the contact information you are trying to import. Make sure that you do not re-arrange or change any of the columns in the existing spreadsheet, or you will receive an error when attempting to import this information.

Drag and drop the Customer Salespeople file on to the screen below

Customer Salesperson Import - CompanySalespeople-CSV

Upload

Review

company_salespeople.csv

Select files to upload
Or drag and drop files

Review the information displayed in the Review tab

Customer Salesperson Import - CompanySalespeople-CSV

Upload

Review

Customer	Salesperson	Rate	Error
Best Store Ever	John Smith	10.00%	

Click Import to finalize the process

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Customer Salesperson Import - CompanySalespeople-CSV

Upload

Review

Customer	Salesperson	Rate	Error
Best Store Ever	John Smith	10.00%	

Re-Validate

Clear Import

Download Template

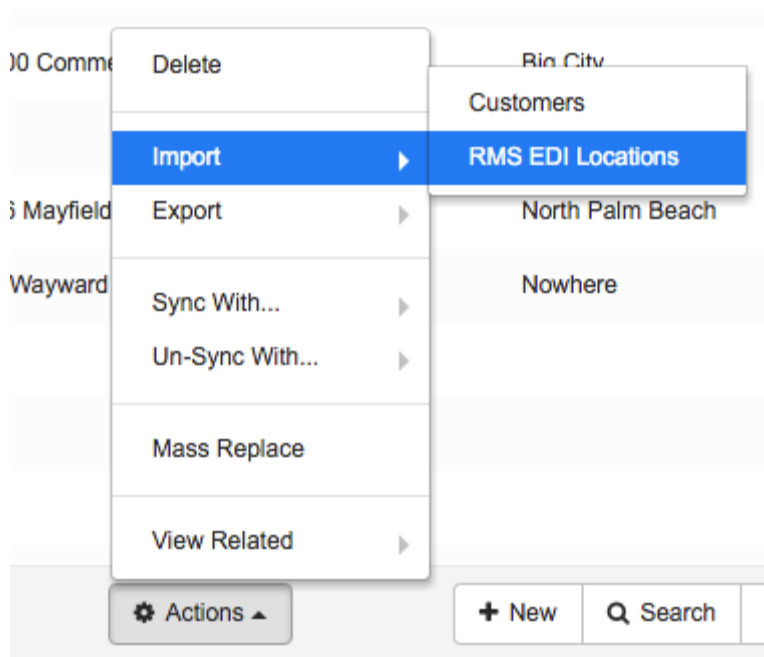
Import

List

Importing RMS EDI Locations

The plugin that permits integration with RMS has simplified the process of importing RMS EDI locations. Start by exporting the locations from your RMS software, which will generate an or.txt file with customer address and shipping information.

Run Import Command



Click on Customers -> Actions -> Import -> RMS EDI Locations. Upload the or.txt file (by dragging and dropping or clicking the red icon, selecting the file, then clicking open), review for errors, then click import.

More information on the Customer Import Template

RMS EDI Locations are exported to ApparelMagic via a comma delimited text file that mirrors [this](#) excel format. Please note the provided information on the following fields:

Customer_id (required): numeric identifier of customer in ApparelMagic, equal to the customers "Account" number, which can be obtained from the Customer List. Must be included to associate order with customer.

Address_1 (required): Only one of the two is necessary, but both may be imported

City, State, Zip, Country: All are required

Type: Defaulted to use "Ship to"

Other RMS Integration Articles

The RMS integration can be used to [import orders information](#) into and [export invoice information](#) from in ApparelMagic Cloud. Please see the knowledge base articles linked above for more information.