

## Import Accounts

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# Import Accounts

*Records > Accounts > New/Import*

You can create new accounts by importing from an external list. To add the account number to an Excel, CSV, or text file, you simply need to specify the number.

**Action:** Select **Import Accounts**.

**Connector type:** Defines the communication method, protocol, or interface used to access and retrieve the data.

**Connection string:** A string of text that specifies the information needed to establish a connection between the software and the data source, such as a database file or external service. It acts like a set of instructions or a **key** that tells the software to locate and access the data it needs to import.

**Reference columns by:** Determines how the columns in your data are identified during the import process.

- **Reference by Name:** This means you use the column header or the column name to refer to data.
- **Reference by Number:** This means you refer to columns based on their position or index within the dataset. Instead of using the column name, you refer to the column by its numerical position.

**Account column:** Specify which column in the import file contains the account number to be imported. Based on the above Reference columns by value selected, identify the column by its heading or **column** number.

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