

Import Accounts

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Import Accounts

Records > Accounts > New/Import

You can create new accounts by importing from an external list. You simply need to specify the account number to add in an excel, csv or text file.

Action: Select 'Import Accounts'.

Connector type: See import connections for help with setting up a connection to a file to import.

Connection string: See import connections for help with setting up a connection to a file to import.

Reference columns by: See import connections.

Account: Specify what column in the import file contains the account number to be imported. Identify the column by the heading or by the column number based on the above 'Reference columns by' value selected.
