

Below are **COLUMN** headers in the order that they in Crate Pro 6. For ease of viewing they are shown as ROWS but your information **MUST appear in COLUMNS for correct import.**

If you have the columns listed in this order you won't have to field map (match your spreadsheet column to the corresponding column in Crate Pro so the correct data fills into the correct fields). If you don't have data for that column just add the column and leave the information blank.

ADD ANY COLUMN THAT IS LISTED INTO YOUR IMPORT SPREADSHEET EVEN IF YOU DO NOT HAVE DATA TO ENTER

<u>CRATE PRO FIELDS</u>		<u>INFORMATION</u>
Facility ID	<i>ignore</i>	Do not add any column headers for these first three Crate Pro fields to your import spreadsheet
KeyID	<i>ignore</i>	Do not add any column headers for these first three Crate Pro fields to your import spreadsheet
External ID	<i>ignore</i>	Do not add any column headers for these first three Crate Pro fields to your import spreadsheet
<b>Customer ID</b>	<b>Add this column</b>	<b>This is the header for Column A in your import spreadsheet.</b> You may leave the cells empty and Crate Pro will create the ID. If you chose to enter a Customer ID you must NOT duplicate any existing Customer number or a number that can be repeated in the existing series. Check Preferences -> Misc -> Numbering .
Customer Address	<b>required</b>	This is the Company Name
City		
State		
Postal		
<b>Country</b>	<b>Add this column</b>	
Phone		If you use a different format than xxx-xxx-xxxx for phone number entry, please create the column 'Override Phone Mask' and enter '1' in the cells (See this field below)
FAX		
Email		
Last Name		
First Name		
Website		
<b>Type:</b>	<b>Add this column</b>	Commercial or Retail: You may leave the cells blank but create the column
<b>Active</b>	<b>Add this column</b>	Enter '1' for yes (leaving this field blank will mean you have to check the Active box in the Customer module for each customer you want active in Crate Pro)
<b>Taxable</b>	<b>Add this column</b>	Enter '1' for yes -- leave blank for no
Sales Tax rate		example: .065 is 6.5%
Labor Mark Up		enter a percent if mark up over and above what is set in Preferences ->Pricing
Material Mark Up		enter a percent if mark up over and above what is set in Preferences ->Pricing
Overtime Title		enter text here if this customer prefers a different title used when Overtime is added
Separate Overtime		enter percent of Overtime markup over and above current overtime markup in Preferences ->Pricing

**CRATE PRO FIELDS**

**Billing Code**  
**Billing Terms**  
**Export**

**ProjLIFDescription**  
**Override Phone Mask**

**Version** *ignore*  
**AddAcct** *ignore*  
**AddTerm** *ignore*  
**AddHost** *ignore*  
**AddDate** *ignore*  
**AddTime** *ignore*  
**AddTimeStamp** *ignore*  
**AddTimeStampHost** *ignore*  
**ModAcct** *ignore*  
**Modterm** *ignore*

**INFORMATION**

Do you have a Billing Code in your accounting to track this customer?  
Suggested to leave blank and complete this as you create Projects for customer

Do not enter data - Crate Pro 6 will use your settings in Preferences -> Forms. This information can be adjusted in the Customer module if your customer

Enter '1' in this field if you use an international phone format in the Phone/Fax fields. (Other than xxx-xxx-xxxx)

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B	C	D	E	F	G	H	I	J	K
company_name	address	city	state	zip	country	phone1	fax	email	last_name
Benton, John B Jr	6649 N Blue Gum St	New Orleans	LA	70116		504-621-8927	504-845-1427	jbutt@gmail.com	Butt
Chanay, Jeffrey A Esq	4 B Blue Ridge Blvd	Brighton	MI	48116		810-292-9388	810-374-9840	josephine_darakjy@darakjy.org	Darakjy
Chemel, James L Cpa	8 W Cerritos Ave #54	Bridgeport	NJ	8014		856-636-8749	856-264-4130	art@venere.org	Venere
Eltz Printing Service	629 Main St	Anchorage	AK	99501		907-285-4412	907-271-2010	lnnrocki@hotmail.com	lnnrocki

