

Enrollware Location Import Specs

Enrollware can import a list of locations from a Microsoft Excel or CSV file. This document serves to describe the format requirements for the import file.

Sample files can be downloaded here:

- <https://www.enrollware.com/help/enrollware-location-import-sample.xlsx>
- <https://www.enrollware.com/help/enrollware-location-import-sample.csv>

General Requirements

1. The Excel import file must be from Microsoft Excel 2007 or newer and use the file extension of .xlsx. The CSV import file must use the file extension of .csv.
2. The first row of the import file must be a header row containing the field names.
3. The following column names are accepted:

Name, Directions, Abbreviation, Make Default, Print On Cards 1, Print On Cards 2, QuickBooks Location Name, Address 1, Address 2, City, State, Zip, Include Address In Communications, Contact Name, Contact Email, Contact Phone, Internal Notes
4. The State field, if included, should be populated with a valid 2 letter state abbreviation.
5. The Make Default field, if included, should be populated with 'Y' if setting to true is desired. Any other input (including leaving blank) will set it to false.
6. The Include Address In Communications field, if included, should be populated with 'Y' if setting to true is desired. Any other input (including leaving blank) will set it to false.
7. There is a limit of 100 locations per import file.
8. Empty entries will be removed.