

# Creating Multiple Customers through Batch Upload

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## Quick Start

1. Download and complete the batch upload template. Copy and insert rows to create multiple customers.
2. Save the template in a comma separated format (CSV).
3. Upload your template batch data file (Upload Customers page).
4. Review your results

(Detailed information is available in the Agency Guide to eBilling Online, available by clicking the Documentation Link on Pay.gov's agency website.)

## Template

The batch upload template provides the structure for the data used to create customers.

- The first row in the template must have the template version number. This row can only appear once.
- Row headers and names in the left-hand column identify the type of information needed.
- Only rows whose name ends with "Data" can be filled in.
- Do not change the order of the rows in the name. You can copy and insert new data rows as described below as long as the rows remain in the same relative position.
- If data is entered for a Label, the corresponding Value is required, and vice versa.
- The maximum number of customers allowed in a single customer file is 500 customers. If more customers are required, additional customer files will need to be created.
- Any number of customers can be included in a batch data file as long as the .csv file is not larger than 2 MB.
- When finished save the batch customer data file in .csv format to a location from where it can be copied by eBilling Online.

## Row and Column Headings

(Only ASCII2 characters are allowed.)

Row Name	Column Name	Value Format	Required	Description
TemplateVersion	n/a	n/a	Yes	The version of this template which appears only once at the top of the upload file. This row <u>must not</u> be copied when creating multiple customers.
CustomerData	Customer Name	Alpha numeric	Yes	A name to designate the customer
CustomerData	BAN	Alpha numeric	Yes	A Billing Account Number that will represent this customer.

## Validation

Pay.gov validates a batch customer data .csv file when it is uploaded. Errors are immediately displayed at the bottom of the Browse/Upload dialog. Pay.gov checks for the correct template version, for missing required values, and for incorrectly formatted values. Error messages indicate where (row number) an error was found and will include the row label. Up to ten errors are listed at a time. A final listed message may indicate there are more than ten errors, which if uncorrected will be displayed after the first ten are fixed.

Uploaded batch customer data files containing errors are not accepted or recorded by Pay.gov. Only files with no errors are actually processed.

## **Creating Multiple Customers**

To create multiple customers:

1. Copy an entire CustomerData row from the template
2. Paste the rows below the last 'CustomerData' row.
3. Fill in the correct values.
4. Repeat to create as many customers as needed.

The example shown below represents a customer template file with twelve customers. For illustration only, cells have been highlighted to show where values are entered.

	A	B	C	I
1	TemplateVersion	1.01		
2	CustomerHeader	Customer Name*	BAN*	
3	CustomerData	Customer1	1211111	
4	CustomerData	Customer2	1311111	
5	CustomerData	Customer3	1411111	
6	CustomerData	Customer4	1511111	
7	CustomerData	Customer5	1611111	
8	CustomerData	Customer6	1711111	
9	CustomerData	Customer7	1811111	
10	CustomerData	Customer8	1911111	
11	CustomerData	Customer9	2211111	
12	CustomerData	Customer10	2321111	
13	CustomerData	Customer11	2411111	
14	CustomerData	Customer12	2511111	
15				