

Job Aid: Automatic Import Customer Database

When converting from CCC Pathways[®] your existing customer database was Purpose exported to a file. This job aid describes how to locate the Customer Database in CCC ONE[®] and import that file.

Procedure Use the following steps to locate the Customer Database:

Step	Action			
1	Go to the View Menu and select		Q	4
	Customers. The Customer page displays	New	View	Action
	with the current customers you have added	A	🗁 🛛 W	orkfiles
	to the database.	C.	E Customers	
			🛐 Ta	sks

💵 Customers	Search Result	5						
	New Customer	😚 Refresh 🛛 🚗 Prin	t 🛕 Print Preview	Export to CSV			🔳 Import	Customers
Last Name First Name Company Primary Phone V Email	Email	Address 1	^					
	🔜 🔠 Baccam	Shana		(951) 222-1313 Day			123 Main St	Jones
First Name:	A		Bagels	(740) 545-9874 Day				
	🔠 Harrigan	David		(740) 465-3210 Evening		🥜 Edit	📲 🖁 Merge 🗙 Dele	te 🙁
Company:	2		Chicane	(740) 124-5697 Evening				=



Continued on next page



Job Aid: Automatic Import Customer Database, Continued

Procedure Step Action (continued) 4 Open ? × 🔽 🔇 🤌 📂 🛄-Look in: 🛅 customerdatabase ConvertedCustomerDatabase.csv My Recent Documents 3 Desktop TE File name: ConvertedCustomerDatabase.csv ~ NOpen My Computer Files of type: CSV files Čancel ¥ The file path displays in the Import Customers prompt. Import Customers Select File to Import 1 Please select the CSV file to import **Choose File** C:\CCC\customerdatabase\ConvertedCustomerDatabase.csv Next 🌳 🕔 Cancel 5 Click Next to continue.

The Import Successful prompt displays. The number of customers imported is provided. Click **Finish** to return to the Customer page.

┺≡	Import Successful Customer import successfully completed.	
	Import Successful	
	715 customers were successfully imported.	

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