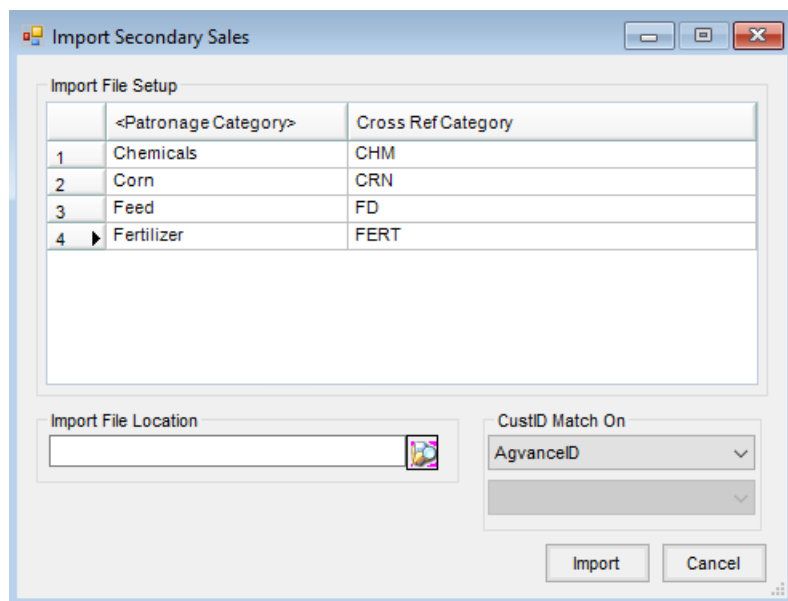


Import Secondary Sales

Last Modified on 05/12/2026 9:44 am CDT

The Import Secondary Sales feature was designed to import data from a secondary source. It requires the import file to be in a CSV format. With a proper format, a secondary (non-Agavance related) set of data may be captured into Agavance. Please consult SSI Support Staff before using this feature and for the file format.



- **Patronage Category** – Double-click to choose the Agvance Patronage Categories to use.
- **Cross Ref Category** – Enter the cross-reference category next to each corresponding Patronage Category.
- **Import File Location** – Select the **Browse** icon to choose the location of the file to be imported.
- **CustID Match On** – Choose an option from the drop-down for the location of the information Agvance should use to match up the Customer in Agvance with the information in the non-Agvance data. If *Attribute* is selected, the lower drop-down field is enabled to select the specific Attribute.
- **Import** – Select to import the sales information from the file selected.

How to Create the File

1. Import data into Excel.
2. Sort data into four columns in the following order: *Customer ID, Patronage Category, Units, Dollars*.
3. A Patron cannot have more than one row per Category.
4. Customer IDs must reference either the Customer ID or the Customer Cross-Reference in Agvance.
5. Save as a .csv file.

Note: The file cannot contain a header record.

How to Import the Data File

Note: If Support becomes involved in Importing Secondary Sales, the time is billable at the current hourly rate.

1. At *Patronage / Capture Activity / Import Secondary Sales*, select the location of the import file.
2. In the *CustID Match On* area, select the CustID match from the import file to Agvance.
3. Indicate the *Patronage Categories* to be used on the import.
4. Insert the character reference in the *Cross Ref Category* that will match the Patronage Category to the import file category.
5. Select **Import**.
6. If an error report is generated, modify the Excel file and retry the import.