

Customers Import and Export

Depending on your version, this function may not yet be activated. Please contact your account manager for more information.

In Surface Solutions, customer data can easily be exported and re-imported using a **CSV file**. This allows both the backup of existing customer data and the simple transfer of customers from other systems.

Export Customers

Through customer management, you can export all existing customers as a **CSV file**. This file contains all relevant information for each customer, including the **customer number**, which serves as a unique identifier. The CSV export is especially useful for backing up data or making bulk changes outside the system.

Edit and Reimport Customers

The exported CSV file can be opened and edited in a spreadsheet program. When making changes, ensure that the **customer number** remains unchanged — it serves as the link between existing records and the updated information.

After editing, you can upload the file again in the same format. During import, existing customer data will be updated based on the customer number. If an entry contains a **new customer number** that does not yet exist in the system, a **new customer** with that number will be automatically created.

Import Customers from Other Systems

If you want to import customer data from another system, it must first be converted into the **Surface Solutions CSV file format**. Only in this way can the system correctly match the fields. Customers without a customer number will automatically receive the **next available customer number** during import, ensuring continuous numbering.

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