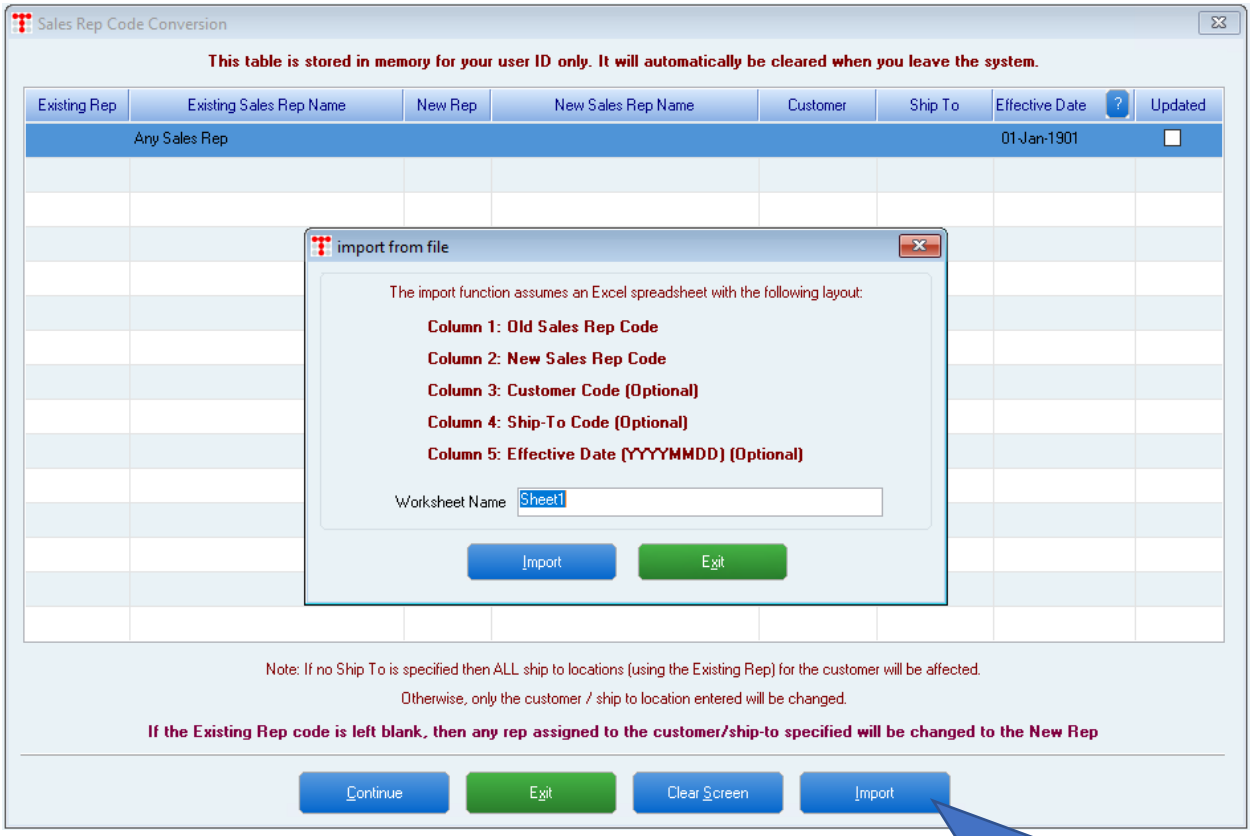
Visual Streamline FAQ

How can we mass import Sales Rep Codes and what's the file type & format?

In-order to mass import Sales Rep Codes, you may run the utility under **Accounts Receivable > Change Master File Codes > Sales Rep Code Change** and use the import function to import an excel file (.xls) with the below mentioned layout.

When you change a Sales Rep code for an effective date, it will change all history from that date to present based on the Customer and Ship To IDs requested. You also need to rebuild your sales analysis afterwards for S/A Reports to pick up the change.



The import function assumes an Excel spreadsheet with the following layout:

Column 1: Old Sales Rep Code
Column 2: New Sales Rep Code
Column 3: Customer Code (Optional)
Column 4: Ship-To Code (Optional)
Column 5: Effective Date (YYYYMMDD) (Optional)
Worksheet Name: Sheet1 (or whatever the sheet name is)