

GROUP / ROUTE

1. Export Customer DB (settings → database → “import / export customer database” → Export CSV → Download the file that finished exporting)
2. Delete all customers from the spreadsheet that will not be associated with the Group/Route Association
3. We will only keep a few columns with data:
 - a. Id field
 - b. Route or Group field with case sensitive text as exactly in the system (screenshots below)

A	B	C	D	E	F	G	H	I	J	K
id	last_name	first_name	email	billing_email	register	last_visit	sales	balance	credit_balance	route
10023301										Anderson Route
10023336										Anderson Route
10023337										Anderson Route
10023338										Anderson Route
10023339										Anderson Route
10023340										Anderson Route
10023341										Anderson Route
10023342										Anderson Route
10023343										Anderson Route
10023344										Anderson Route

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4. Optimized Routes:
 - a. Leave stop_number column blank
5. Fixed Route order:
 - a. KEEP the stop_order column with the associated stop numbers in this column
6. Will Call | Regular Customers:
 - a. In the Will Call column type **yes** in the column/cell for customers needing to be will call
 - b. If customer is a route regular keep the column/cell blank
7. **SAVE AS** in CSV format and import (make sure to Test Run) before importing.