S03 – Quick Start Guides
Azotel Customer Import Spreadsheet

Contents

1.   Scope

This document explains in detail the fields required in the spreadsheet requested from new operators migrating customer data from existing systems. The fields requested in each tab of the spreadsheet will be explained in a table.

2.   Customer Details

The customer details tab will consist of all general information regarding your subscribers. It is advisable to keep the list as complete as possible.

2.1 Fields Requested for Customer Information

	Customer Information Tab		
Ref	Field	Mandatory	Details
1	Invoicing ID	YES	Must be unique Allowed Characters: Alphanumeric with underscore only. Recently the "." Parameter has been allowed. Example: Jsmith001 or 000000001.
2	Name	YES	Full name to appear on invoices, etc. It is recommended to use first name, last name format or last name, first name, but to be consistent with your choice. Example: John Smith OR Smith, John.
3	Nickname	YES	Must be unique Allowed Characters: Alphanumeric with underscore only. Can be same as invoicing ID but each must be unique. Example: Jsmith001.
4	Street 1	NO	First line of billing address, to appear on invoices. Example: Apartment 1B
5	Street 2	NO	Second line of billing address, to appear on invoices. Example: Main Street
6	City	NO	Example: Dallas
7	State	NO	Must be full state common name, e.g. New York instead of NY. Available to US Operators only. Example: Texas. List of states: http://en.wikipedia.org/wiki/List_of_U.S._states
8	ZIP	NO	Example: TX00001
9	Country	NO	Example: United States.
10	Install Street 1	NO	Same format as billing address, some clients may have a different install address to their billing address.
11	Install Street 2	NO	Same format as billing address, some clients may have a different install address to their billing address.
12	Install City	NO	Same format as billing address, some clients may have a different install address to their billing address.
13	Install State	NO	Must be full state common name, e.g. New York instead of NY Available to US Operators only Example: Texas. List of states: http://en.wikipedia.org/wiki/List_of_U.S._states Same format as billing address, some clients may have a different install address to their billing address.
14	Install Zip	NO	Same format as billing address, some clients may have a different install address to their billing address.
15	Phone	NO	Allowed Characters 1-9, -, +, () Example: 001-12-345-678
16	Fax	NO	Allowed Characters 1-9, -, +, () Example: 001-12-345-678
17	Email	NO	Primary email for your client. This will be used for all contact, e.g invoices, mass email notification, disconnection notices, marketing emails, etc unless other emails are specified.
18	Accounts Email	NO	If the email address to receive invoices differs from the main email contact you must enter this here. Bear in mind that "email" is the most important. "Accounts email" is secondary.
19	Support Email	NO	Informational field to track your client's support email.
20	Website	NO	Example: www.azotel.com
21	Contact	NO	Primary contact e.g Jane Smith.
22	Customer Status	YES	**Only** the following statuses are available: current, post, waiting for install, installed, contract, potential. Note that status "post" covers cancelled or disconnected customers.
23	Type	YES	Only the following types are available: customer home, customer business, government, partner, and reseller.
24	Contact Date	NO	The date you first made contact with your customer or entered the customer into SIMPLer or your previous system. Informational field. **Date format is YYYY-MM-DD**
25	Installation Date	YES	The date your customer was first installed. **Format: YYYY-MM-DD**
26	Start Date	YES	NB: The date that your customer should start invoicing in SIMPLer. **Format: YYYY-MM-DD** **Example: 2013-05-01**
27	Vat exemption	NO	Accepted fields: Yes or No.
28	Credit Days	NO	If you wish to give credit to a customer (ie not to invoice them on their start date but to allow the system to ignore invoices until a certain date. Example: start date is May 01 but invoices are being delayed until May 05. Enter 4 into this field)

29	Payment Method	YES	Must be cash, cheque, credit card, direct debit (which is ACH), standing order, or online transfer.
30	Frequency	YES	How often should the customer be invoiced? 1 = monthly, 12 = annually, etc
31	Send Method	YES	How should their invoice be sent? For "send paper copy" enter pdf. For "email to customer" enter mail. Other options: none, both
32	Gateway	NO	Depends on the gateways as defined in your instance. (Under network settings) It should be the WIB ID your customer is assigned to.
33	Bucket	NO	Depends on the buckets defined for the gateway the customer is assigned to. It should be the bucket ID your customer is assigned to.
34	Note	NO	Visible to installers on Work Orders. E.g house directions.
35	Private Note	NO	Internal access only. May contain terms of sale you wish for only your staff to see.
36	Gen. equip graphs	NO	Values accepted are either on or off.
37	PO Number	NO	Purchase Order Number – optional.
38	Importance	NO	You may have a system of ranking customers based on priority. In SIMPLer you may use numbers 1 to 5 for this.
39	Marketing Code	NO	A marketing code you may use for your customers – optional.
40	Marketing Emails	NO	Values accepted are on or off. When "on", this group of customers can easily be selected using the mass email tool.
41	IP type	NO	Types accepted are Public or Private.
42	EUP username	NO	If not specified SIMPLer can generate these randomly at a later date. This relates to your customer's login details for the End User Portal.
43	EUP password	NO	If not specified SIMPLer can generate these randomly at a later date. This relates to your customer's login details for the End User Portal.
44	Installation Area	NO	Informational area added by operator for quick identification. Useful when using Google Calendar.
45	Community Code	NO	Informational code added by operator for quick identification. Useful when using Google Calendar.
46	GPS x / LAT	NO	SIMPLer has integrated with google maps to show exact location on the map once given GPS coordinates.
47	GPS y / LONG	NO	SIMPLer has integrated with google maps to show exact location on the map once given GPS coordinates.
48	Tax Mode	NO	Accepted values are: Default, Fixed, or Flexible. Set Flexible if using a tax zone you have specified in your instance.
49	Tax Zone	NO	Must be defined by user in SIMPLer. Only used for systems with multiple tax rates.
50	Tax Rate	NO	Can be set once tax zones are defined.
51	Site Name	NO	Must match user-defined sites. (Network tab in SIMPLer. Site tab on spreadsheet)
52	Tracking	NO	An operator defined tracking field. Useful to track groups of customers such as "comp" – complimentary service users, etc.
53	Customer VAT Number	NO	Customer VAT number to show on invoice if required

3.   Customer IP Details

This table is designed to match customer IP details to customers listed in section 2. Also contains RADIUS Usernames and Passwords if used.

3.1   Fields Requested for Customer IP Details

	IP Details Tab		
Ref	Field	Mandatory	Details
1	Invoicing ID	YES	Must match invoicing IDs defined in the previous tab. This is the invoicing ID your IP will be assigned to.
2	IP Address	YES	Customer's IP address Format x.x.x.x
3	MAC Address	NO	Mac address associated wiith this customer Format: XX:XX:XX:XX:XX:XX Required only if DHCP with fixed IP addresses will be used on WIB.
4	Label	NO	
5	Mac restrict	NO	Accepted values are on or off. Determines if the WIB should ensure that a specified MAC only uses the IP. Puts heavy burden on WIB so "off" is recommended unless suspecting duplicate IPs
6	Type	YES	Accepted values: Public or Private
7	Radius_username	NO	Radius username assigned to customer. (if using RADIUS based network)
8	Radius_password	NO	Radius password assigned to customer. (if using RADIUS based network)

4. Products

A list of products associated to your instance in SIMPLer. This list contains the complete list of your core products. These products will then be mapped to customers using section 5 – subscriptions.

Note: Once these products are imported into SIMPLer they will be given a product ID. This product ID will never change and any financial reports containing products will be tracked from this ID.

4.1 Fields Requested for Product Information

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Ref	Field	Mandatory	Details
		Products Tab	
1	Product Code	YES	Enter a meaningful code for your product, e.g ZONE1-2M. Unique identifier for products. Alphanumeric characters allowed.
2	Price	YES	Example: 25.99. Price is excluding VAT.
3	Description	YES	Use a meaningful description as this is used on the invoice to customers. Example: High speed monthly broadband package.
4	Prod. Type	NO	Possible types are standard (used in the majority of cases), import (used to import variable prices set by outside sources e.g VOIP), Dynamic (will base it's price on other products on an invoice, used for a percentage maintenance fee for example), DD/EFT Fail charges (used to add automatically to a customer as an invoice when their Direct Debit or EFT is marked as failed in SIMPLer)
5	Sub. Cycles	NO	Number of times charged to customer. For example installation products are generally 1 cycle. Generally leave this blank if this product is on-going.
6	Sub valid from	NO	Date value YYYY-MM-DD used to archive products or to replace them with new ones.
7	Sub Valid to	NO	Date value YYYY-MM-DD used to archive products or to replace them with new ones.
8	Tax Mode	NO	Possible values: Default, Fixed, Flexible. Set as flexible if tax zones are defined in your instance. (Settings → tax zones)
9	Tax Zone	NO	Must match user defined tax zones in your instance. (Settings → tax zones)
10	Tax Rate	NO	Must match user defined tax rates under tax zones in your instance. (Settings → tax rates)
11	Traffic Allowance	NO	Value in GB to two decimal places.
12	Turn off prorating	NO	Off or on. Installation products should be set to on, as should equipment purchases.
13	Bucket ID	NO	Bucket ID of speed bucket to be associated with this product.

5.   Subscriptions

To map products outlined in section 4 with customers entered in section 1. Use customer's invoicing ID and product Code to form the link between the two.

5.1   Fields Requested for Subscriptions Information

			Subscriptions Tab		
Ref	Field	Mandatory	Details
1	Invoicing ID	YES	Must be a valid invoicing ID as specified in the customers tab.
2	Product Code	YES	Must match codes from import. (Products tab)
3	Description	NO	If left blank will take code specified in the products tab.
4	Price	NO	If left blank will take default as specified in products tab.
5	Quantity	YES	Integer Values. Example: 1. Quantity of line items to appear on the invoice for this particular product.
6	Discount	NO	Percentage: Example: 10.00 for 10%.
7	Premium	NO	Percentage: Example: 10.00 for 10%.
8	Round	NO	Arithmetic, up or down.
9	Type	NO	Recurring, overage or reconnection.
10	Valid to	NO	YYYY/MM/DD – blank if default ie no expiry.
11	Valid from	NO	YYYY/MM/DD – blank if default ie no fixed future start date.
12	Cycles	NO	Integer value for number of times to charge the customer. Example: 1. Default: leave blank.
13	Tax_mode	NO	Values allowed: Default, Fixed, or Flexible. Set Flexible if using a tax zone.
14	Tax_zone	NO	Must match user defined tax zones in your instance. (Settings → Tax Zones)
15	Tax_rate	NO	If using a fixed tax mode you can set this here. Example 8.25 for 8.25%
16	Formula	NO	Only used for import type products.
17	Free_service	NO	Yes or no. Used with the refer-a-friend system.

6.   Equipment

The equipment tab will list all equipment to be stored in the database, including CPEs, base stations or equipment stored at a warehouse.

6.1   Fields Requested for Equipment Information

		Equipment Tab	
Ref	Field	Mandatory	Details
1	Equipment Nickname	YES	Enter a valid nickname for your equipment. Only alphanumeric. Example: SM1.
2	IP Address	YES	IP address assigned to equipment. Format x.x.x.x
3	Description	NO	Example: Canopy SM.
4	Serial Number	NO	Serial number of equipment found on the equipment label.
5	MAC Address	NO	Format: XX:XX:XX:XX:XX:XX
6	Equipstatus	YES	Values accepted are use, stock or fault.
7	Parent	NO	Nickname of parent equipment.
8	Type	YES	Types accepted are specific in SIMPLer. The list are as follows: AirOS BH (SNMP v1 enabled – Interface 2), AirOS BH (SNMP v1 enabled – Interface 3), AirOS BH (SNMP v1 enabled), Airspan Asmax BS, Airspan Marconi WipLL BSR, Alvarion BreezeACCESS AU, Alvarion BreezeACCESS SU, Alvarion Wimax AP, Alvarion Wimax MS, Canopy AP, Canopy BH, Canopy CMM, Canopy OFDM BH V2, Canopy PMP320 AP, Canopy PMP320 SM, Canopy PMP430 AP, Canopy PMP430 SM, Canopy PMP450 AP, Canopy PMP450 SM, Canopy PTP800 BH, Canopy SM, Ceragon IP-10, Generic AP (SNMP v1 enabled), Generic BH (SNMP v1 enabled), Generic SM (SNMP v1 enabled), Greenpacket OX350 CPE, MicroTik AP, MicroTik Router, MicroTik SM, Nanostation SM, Nanostation SM v5.3.3, Other, Redline, SIAE, Switch Port (SNMPv2), Tranzeo, Ubiquity Rocket M-Series, VoIP ATA – CISCO SPA112, VoIP ATA – CISCO SPA2012, VoIP ATA – Generic, WiMax Subscriber Unit, Wipple Subscriber Unit.
9	Snmp Community	NO	Required to poll data from the equipment and generate equipment graphs. Usually it can be found on your equipment web interface under an SNMP tab. Must match the value on the CPE in question. Example: "canopy".
10	Assigned Site	NO	Name of site where equipment is stored as stock.

7.   CPE

Maps equipment defined in section 6 to customers defined in section 1.

7.1   Fields Requested for CPE Information

	CPE Tab		
Ref	**Field**	**Mandatory**	**Details**
1	Equip_nickname	YES	Must match equipment nickname as specified on the equipment tab.
2	Invoicing ID	YES	Customer's invoicing ID as specified on customer tab.
3	Gpsx	NO	Specify in decimal degrees.
4	Gpsy	NO	Specify in decimal degrees.
5	Distance	NO	
6	Colour/ssid	NO	
7	Frequency	NO	
8	Installed by	NO	Informational field to tell which installer has installed the equipment
9	Dish installed	NO	Values accepted are yes or no.
10	Grounding Completed	NO	Values accepted are yes or no.
11	Additional info	NO	Additional text info about this piece of equipment.

8.   Credit Card

Maps customer credit card details with customer accounts.

8.1   Fields Requested for Credit Card Information

<table>
<tr><td colspan="4" align="center">**Credit Card Tab**</td></tr>
<tr><td>**Ref**</td><td>**Field**</td><td>**Mandatory**</td><td>**Details**</td></tr>
<tr><td>1</td><td>Invoicing ID</td><td>YES</td><td>Customer invoicing ID as specified in the customer tab.</td></tr>
<tr><td>2</td><td>Autopay</td><td>YES</td><td>Accepted values: on or off.</td></tr>
<tr><td>3</td><td>Preferred</td><td>YES</td><td>Accepted values: yes or no. This is used when more than one card is on the account.</td></tr>
<tr><td>4</td><td>Holder Name</td><td>YES</td><td>Name of card holder as on card. Example: J Smith.</td></tr>
<tr><td>5</td><td>First Name</td><td>NO</td><td>First Name of Card Holder. Example: John.</td></tr>
<tr><td>6</td><td>Last Name</td><td>NO</td><td>Last name of card holder. Example: Smith.</td></tr>
<tr><td>7</td><td>Card Num</td><td>YES</td><td>Credit Card number. Example: 123456789.</td></tr>
<tr><td>8</td><td>Type</td><td>YES</td><td>Accepted types are Visa, MasterCard, American Express, Discover or other.</td></tr>
<tr><td>9</td><td>Exp. Month</td><td>YES</td><td>Numeric month with leading zero. Example: 01 = January.</td></tr>
<tr><td>10</td><td>Exp. Year</td><td>YES</td><td>Example: 2013.</td></tr>
<tr><td>11</td><td>Street 1</td><td>NO</td><td>Example: 1. Washington Close.</td></tr>
<tr><td>12</td><td>Street 2</td><td>NO</td><td>Example: Main Street.</td></tr>
<tr><td>13</td><td>City</td><td>NO</td><td>Example: Dallas.</td></tr>
<tr><td>14</td><td>County</td><td>NO</td><td>Example: Dallas</td></tr>
<tr><td>15</td><td>State</td><td>NO</td><td>Example: Texas.</td></tr>
<tr><td>16</td><td>Country</td><td>NO</td><td>Example: United States.</td></tr>
</table>

9.   Site

A list of sites in your network. Appears on the network -> sites tab in SIMPLer.

9.1   Fields Requested for Site Information

		Site Tab	
Ref	Field	Mandatory	Details
1	Site Name	YES	Example: AZO-HQ
2	WIB number	YES	WIB number as defined in your instance. (Network settings → gateways.)
3	Contact Name	NO	Example: John Smith.
4	Access Info	NO	Some notes for access to the site. e.g – van required.
5	Gpsx	NO	Decimal degrees
6	Gpsy	NO	Decimal degrees
7	Phone	NO	Example: 0011234567
8	Email	NO	Example: Jsmith@email.com
9	Monthly Cost	NO	For site financial reporting.
10	Site Status	YES	Accepted values are: Production, potential, cancelled, decommissioned.
11	Location	NO	Where the site is located in your network.
12	Country	NO	Country of location.
13	Access Hours	NO	To leave information for your staff of when the site is typically accessible.
14	Auto Site visit	NO	Accepted values: on or off. To automatically track visits due.
15	Next Visit Date	NO	Date value: YYYY/MM/DD
16	Visit Interval	NO	Accepted values: Quarterly, Semi-annually, and annually.
17	Height	NO	
18	Frequency	NO	In Mhz (e.g 5400 for 5.4Ghz)
19	Min_stock_level	NO	Integer value
20	Sitetype	YES	Accepted values: network, warehouse or installer.

10. Base Station

This tab will identify base stations from the equipment defined in section 6.

10.1 Fields Requested for Base Station Information

Base Station Tab			
Ref	Field	Mandatory	Details
1	Equip ID	YES	Must match equipment ID as defined in the equipment tab.
2	Site ID	YES	Must match site ID as defined in the site tab.
3	Sector	NO	
4	Direction	NO	
5	Colour/ssid	NO	
6	Frequency	NO	
7	Installed by	NO	Informational – which installer has installed this equipment.
8	Description	NO	Description of the equipment – longer version of nickname.
9	WIB Number	YES	WIB number from instance.
10	Monitor	YES	Values accepted are: Monitor Email, Monitor Email + SMS, Monitor No Alert or No Monitor.

Annex A: Change history

Date	Author(s)	Subject/Comment	Old	New
\\multicolumn		**Change history**		
18 April 2013	emma	Initial Draft	n/a	001
29 April 2013	emma	Version 2	001	002
07 May 2013	pawel	Update document	002	003
18 Jun 2013	paul	Changed doc's title, copyright and correct year, doc num on all pages	003	100
22 Jan 2014	emma	Reviewed and updated document	100	101
23 July 2014	emma	Reviewed and updated doc – cross referenced to import details PDF	101	102
05 Jan 2015	emma	Review Section 5.1	102	103