

To apply a specific customer category to a bulk list of customers, follow the steps below on how to import a CSV list to customer categories:

Step 1: Export your Customer Account Codes

- Navigate to Customers -> List customers



- Show hide the correct column "Account codes"
- Show "all" Rows
- Export to CSV



- Open the exported list in Excel

Step 2: Manipulate the Data in Excel

- In cell B2 (next to your first Account Code) Type the following: **=A2** then press enter.

This will result in the same account code displaying next to one another.



- Directly below in cell B3, type the following: **=B2&" "&A3** then press enter.



- Hover your cursor over the bottom right corner of cell B3, when a cross (+) appears, double-click to apply the formula to the entire column.



- Scroll to the last row of data. Select the cell in the B column containing all the account codes, separated with a comma and copy the contents of the cell.

**Step 3: Apply the Category to all your customers**

- Open the add to customer's button  of newly created category.
- Paste the values which you just copied into the text field, and select "add to customers".



- The category will now be applied to all customers

