Import or Export Customers

How to Import or Export Customers in Muhasib ERP

Overview

This guide will help you export customer data or import a validated customer batch without duplicates or unintended balances.

Many customers and related detail rows can be created. Matching behavior determines whether reruns duplicate/update records.

Who can do this

You need access to Import/Export Customers and needed Customer Add/Update rights.

Before you start

Back up the database, use the target-build template, create groups/contact types/accounts, and prepare a small synthetic pilot.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Import / Export Customers.

Import or Export Customers

Step 1: Export current data/template when needed

Step 2: Preserve headers and stable identifiers

Step 3: Validate required names, contacts/types, unique contacts, groups, addresses, numeric/date fields,

Validate required names, contacts/types, unique contacts, groups, addresses, numeric/date fields, and any opening balances.

Step 4: Import a pilot

Step 5: Determine created/skipped/failed and whether any partial rows committed

Step 6: Restore/correct, then import the approved batch once

Check your work

Compare source rows with customer/contact/address/group counts and compare and confirm any opening balances/ledgers.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Never rerun after uncertain partial success.
- Keep secrets/personal data protected in export files.

Related guides

- Create a Customer
- Configure a Customer Opening Balance

- Create and Verify a Manual Backup

What to do next

> **Create a Customer**.

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