

OnRent: Accounts Import Guide

Field	Mandatory	Values	Notes	Default	Example
ID	No	Automatically Assigned	The ID is system identifier for this record. To create new records: leave blank To update existing records: leave intact	Automatically created and assigned	4cfde7ec-01e4-4575-8fcb
Address1	No	Maximum Characters 50	Fill in Address Line 1 with the Account Address	Blank	Unit 5/6
Address2	No	Maximum Characters 50	Fill in Address Line 2 with the Account Address	Blank	Daleside Road
CanEmail	No	Values: True - Yes False - No	Can you Email this Company?	FALSE	Yes/No
CanMail	No	Values: True - Yes False - No	Can you Mail this Company?	FALSE	Yes/No
CanTelephone	No	Values: True - Yes False - No	Can you Telephone this Company?	FALSE	Yes/No
City	No	String Value	Fill in City with the Account City	Blank	Nottingham
CountryName	No	Matching Country Name in > System Setup > Countries	Fill in Country with the Account Country	Company Default Country	United Kingdom

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County	No	String Value	Fill in County with the Account County	Blank	East Midlands
Email	No	Enter Email Address	Fill in the email with the Account email	Blank	Lizzy.buck@inspire.com
Fax	No	Whole Numbers	The Company's Fax Number	Blank	0800 0101 1010
Industry	No	Matching Industry in > System Setup> List of Values	To specify different industries and apply them against specific accounts, you can add or change your list of values.	Company Default Industry Value	Construction
InvoiceRunCodeName	No	Matching Invoice Run Codes Name in > Accounting and Charging > Invoice Run Codes	The invoice run code enables specific invoice run schedules. You can create your own list and apply this to specific accounts to run invoicing batches within different dates within the month.	Blank	Exclude from Invoice Run
Name	Yes	Maximum Characters 160	Enter the Account Name	Blank	inspHire Limited
Number	No	Maximum Characters 20	Enter the Account Number	Blank	INS001
OwnerUserEmail	Matching User Email as in the system	Email Address	The Account will be owned by the User defined. The User email is the users email within the system.	If the field is left blank it will Default to the User who is importing Accounts	Lizzy.buck@inspire.com

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PaymentTermName	No	Matching Payment Term Name in > System Setup > Payment Terms	The Payment Term, Typically, these terms specify the period allowed to a buyer to pay off the amount due. You can create your own list and apply this to specific accounts.	Blank	30 Days
Postcode	No	Enter Account Postcode	Enter the Account Postcode	Blank	NG2 4GT
Status	No	Matching Status in > System Setup > List of Values	The Status of the Account. If a product group with that name does not already exist, you will have to create one.	The Default Status in List of Values	Active
Telephone	No	Whole Numbers	Enter the Account Telephone	Blank	0800 000 000
Type	No	Matching Type in > System Setup > List of Values	This is the Type of Account, to create or review the list in List of Values go to System Setup> List of Values > Type	The Default Type in List of Values	Customer
Website	No	Enter Website Details	Enter the Account Website	Blank	https://www.insphire.com/
ActiveFlag	No	Values: True - Yes False - No	This is to specify if the Account is Active in the system, Yes or No.	TRUE	Active
OnStopFlag	No	Values: True - Yes False - No	This is to specify if the Account is On Stop in the system, Yes or No. If the Account is On Stop, you will be able to create Quotes but not be able to make Rental Orders	FALSE	Yes/No

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TaxClassName	No	Matching Tax Class Name in > System Setup > Tax Class	The Account tax class to be applied to this Account. The value must match the name of a tax class in System Setup > Account Tax Classes.	The Company Default Tax Class in System Setup	Standard VAT
StateName	No	State Name	Enter the Account State Name	Blank	Florida