

How To Import a File into PaySimple 2.0

1. Log into your PaySimple 2.0 system at <https://secure.paysimple.com>.
2. Click on the **Upload Center** tab to be directed to the **New File Import** screen.

The screenshot shows the 'New File Import' interface. At the top, there are four tabs: 'Process Payments', 'Upload Center', 'Reports', and 'System Management'. The 'Upload Center' tab is active. Below the tabs, the title 'New File Import' is displayed. To the right of the title, there is a red asterisk and the text '* - REQUIRED INFORMATION'. The form contains the following fields and controls:

- Upload Type:** A dropdown menu with 'Customers' selected.
- Upload Name:** A text input field containing 'Your name for the Uplo'.
- Description:** A text area containing 'A description of the upload'.
- File Type:** A dropdown menu with 'Csv' selected.
- First Row is Header:** A checkbox that is checked.
- Select File to Upload:** A text input field containing 'C:\Documents and Se' and a 'Browse...' button.
- Upload:** A button located at the bottom right of the form.

3. Choose the **Upload Type** from the drop down menu. Your choices are:
 - Customers
 - Payments
 - Recurring Payment
 - ACH Disbursement
 - Recurring Disbursement
4. Create a name for the import under **Upload Name**.
5. Under **Description** add a description of the upload. (optional)
6. Choose the **File Type**. This is the type of file that will be uploaded and can either be a .csv (comma separated values) or pipe delimited text. To view the list of field requirements for your import, [download the Import Types and Field Requirements guide](#).
7. If the first row of your file has headers, check the **First Row is Header** box.
8. Click **Browse** and select the file you are importing.

9. Click **Upload** and you will be directed to the **Map Field Titles** page.
 - In the **First Row of Your File** column, you will see the headers from the first row of your file. Under **System Field Names**, choose the field header from the drop down menu that matches your file. For Example: If the first column is titled First Name then select First Name from the system column names.
 - Continue mapping until all your columns match a system column.
 - Each upload type has required fields such as First Name, Last Name and Address 1 that are noted with an asterisk (*).
 - Under the HELP section on the right side of the screen, view descriptions of each field by choosing it from the drop down menu.

Map Field Titles

Choose the field name from each drop down menu under System Field Names that corresponds to each column from your file. Rows from your file which are not mapped will not be imported.

Choose a saved mapping: -- no mapping selected --

First Row of Your File	System Field Names
BillingName	<input type="text" value="First Name *"/>
BillingSurname	<input type="text" value="Last Name *"/>
BillingStreet	<input type="text" value="Billing Address 1 *"/>
BillingCity	<input type="text" value="City *"/>
BillingState	<input type="text" value="State *"/>
BillingZip	<input type="text" value="Zip Code *"/>
Country	<input type="text" value="Country *"/>

HELP

-- select a column --

Select a column above to display help relating to that column.

10. Click **Continue**. In the **Mapping Name** field, enter the name to save the column mapping under. By saving your column mapping, you can use this mapping for a future similar file import.

Save Column Mapping

By saving the mapping of column titles you have just mapped, you can use this mapping for a future similar file import.

* - REQUIRED INFORMATION

Mapping Name: *

Description:

11. Click **Save & Continue**.
12. You will now approve your file before processing. The first five rows of your file will show as a preview along with the fields that you have mapped. Click on the **Back to Mapping** button if you need to re-map any of the fields. Once complete, click on the **Approve Batch for Processing** button.

Approve File Import For Processing

Account #	Account Type	Alternate Email	Alternate Phone	Bank Account Number	Bank Name	Billing Address
First Name	Last Name	BillingStreet	BillingStreet2	BillingCity	BillingState	BillingZip
Kimberly M	Abercrombie	517 Shoreside Way		Virginia Beach	VA	23452
Kimberly M	Abercrombie	5856 Attucks Circle		Plainfield	IN	46162

13. Your file has now been approved and is processing. Click on the **Upload Center** link to view the status of the upload. The statuses include:
 - **Imports Queued for Processing** – The import is now queued to be processed
 - **Imports Needing Attention** – Click the **View Errors** link to view the lines on the file that did not upload and why. These are the exact line numbers of your original file so you can refer back to fix the error
 - **Processing Imports** – The import is currently processing
 - **Complete Imports** – The processing of the import has completed

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