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7.24.0 New Features

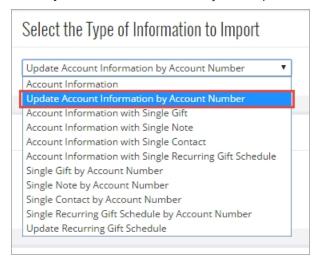
This guide lists new features available in the eTapestry 7.24.0, released on August 14, 2016.

Import: Update Account Information by Account Number

You can now use a new import type to update existing accounts by account number.

Note: To update or edit **Name** or **Salutation** fields for existing accounts, you will need to use another Account Information template since the Account information by account number template does not include these fields.

On the **Management** tab, select **Import**. The Import Categories page appears. Click a category to select it or create a new category. Under **Tasks**, click **New Import**. Enter information in the **Name** and **Description** fields, then select your import file in the **Select the File to Import** field.



In the import type drop down menu, select "Update Account Information by Account Number."

Warning: Once you navigate away from this step, you cannot change the import type.

You must know and include the account number on the source file.

Tip: To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

3 CHAPTER 1

For more information on how to update contact information for existing accounts through import, see $\underline{\text{General Import Setup on page 1}}$.