

Managely – Create Customer Bill Tos

08/05/2024 10:14 am EDT

When importing data from Alarm Biller to Managely, you will need to use the script below to insert default bill records.

if not exists (select * from aCustomerBillTo)

begin

insert into aCustomerBillTo

(CustomerId, IsBusiness, FirstName, LastName, Address1, Address2, Phone1, Phone1Ext,

CellPhone, Email, City, [State], ZipCode, Plus4, ModifyUserId, Inactive, CreatedUserId, ModifyDate, CreatedDate)

select CustomerId, IsBusiness, FirstName, LastName, Address1, Address2, Phone1, Phone1Ext,

CellPhone, Email, City, [State], Zipcode, Plus4, ModifyUserId, Inactive, CreatedUserId, GETDATE(), GETDATE()

from aCustomer

where PrimaryBillTold is null

```
update aCustomer set PrimaryBillTold=bt.Id
```

```
from aCustomer ac
```

```
inner join aCustomerBillTo bt on ac.CustomerId=bt.CustomerId
```

```
where ac.PrimaryBillTold is null
```

```
end
```

```
PRINT 'Begin Converting aCustomer BillTo Defaults'
```

```
PRINT ' Primary'
```

```
INSERT INTO aCustomerBillToDefault
```

(BillTold, CustomerId, Type, ModifyUserId, Inactive, CreatedDate, ModifyDate, CreatedUserId)

SELECT PrimaryBillTold, CustomerId, 1, ModifyUserId, 0, GETUTCDATE(), GETUTCDATE(), ModifyUserId

FROM aCustomer

WHERE PrimaryBillTold IS NOT NULL

PRINT ' Invoice'

INSERT INTO aCustomerBillToDefault

(BillTold, CustomerId, Type, ModifyUserId, Inactive, CreatedDate, ModifyDate, CreatedUserId)

SELECT InvoiceDefaultBillTold, CustomerId, 2, ModifyUserId, 0, GETUTCDATE(), GETUTCDATE(), ModifyUserId

FROM aCustomer

WHERE InvoiceDefaultBillTold IS NOT NULL

```
PRINT ' RMR'
```

```
INSERT INTO aCustomerBillToDefault
```

```
(BillToId, CustomerId, Type, ModifyUserId, Inactive, CreatedDate, ModifyDate, CreatedUserId)
```

```
SELECT RMRDefaultBillToId, CustomerId, 3, ModifyUserId, 0, GETUTCDATE(), GETUTCDATE(), ModifyUserId
```

```
FROM aCustomer
```

```
WHERE RMRDefaultBillToId IS NOT NULL
```

```
PRINT ' Cleanup'
```

UPDATE c

SET PrimaryBillTold = NULL,

InvoiceDefaultBillTold = NULL,

RMRDefaultBillTold = NULL

FROM aCustomer c

WHERE PrimaryBillTold IS NOT NULL

OR InvoiceDefaultBillTold IS NOT NULL

OR RMRDefaultBillTold IS NOT NULL

PRINT 'End Converting aCustomer BillTo Defaults'

