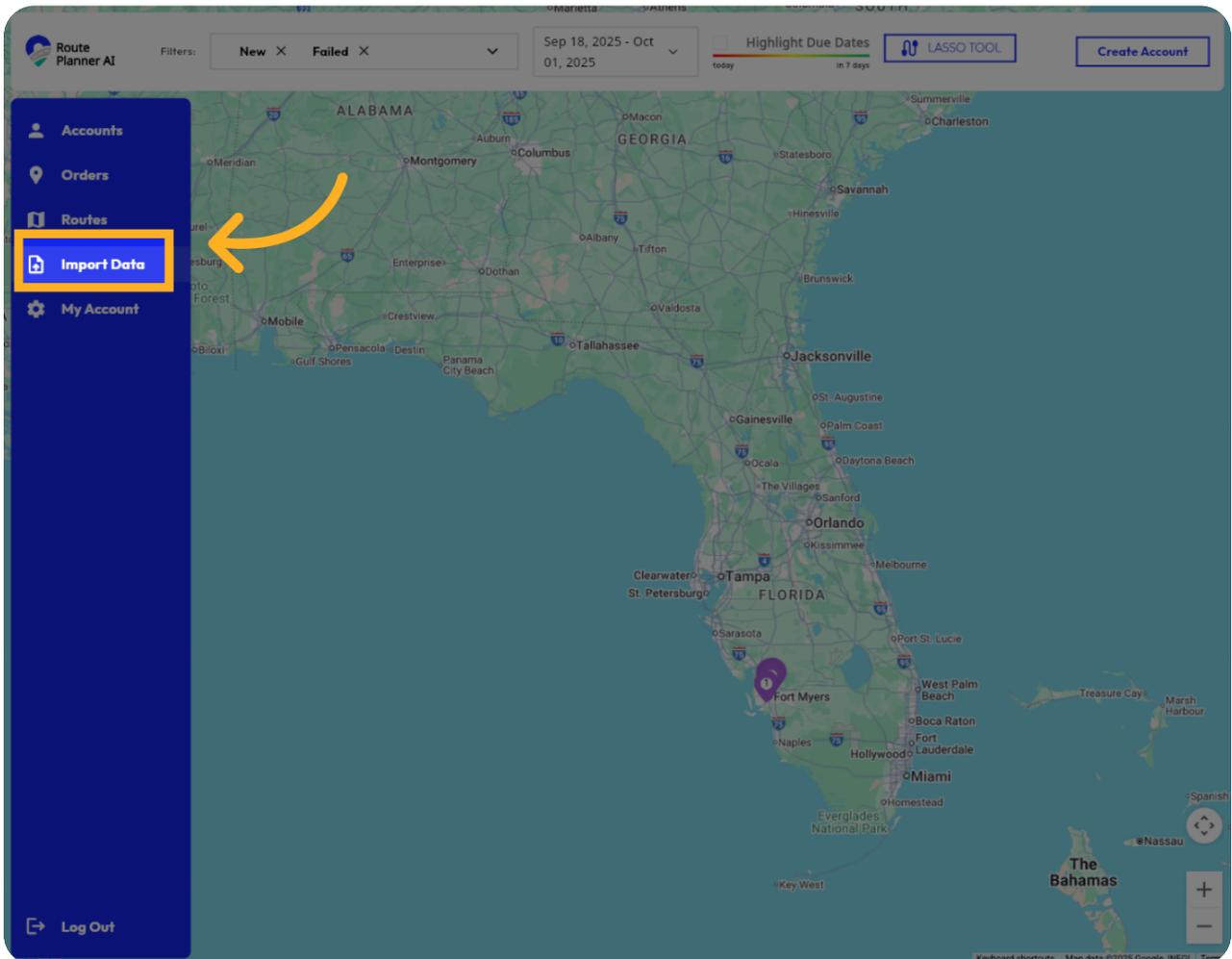


## 01 Click Import Data

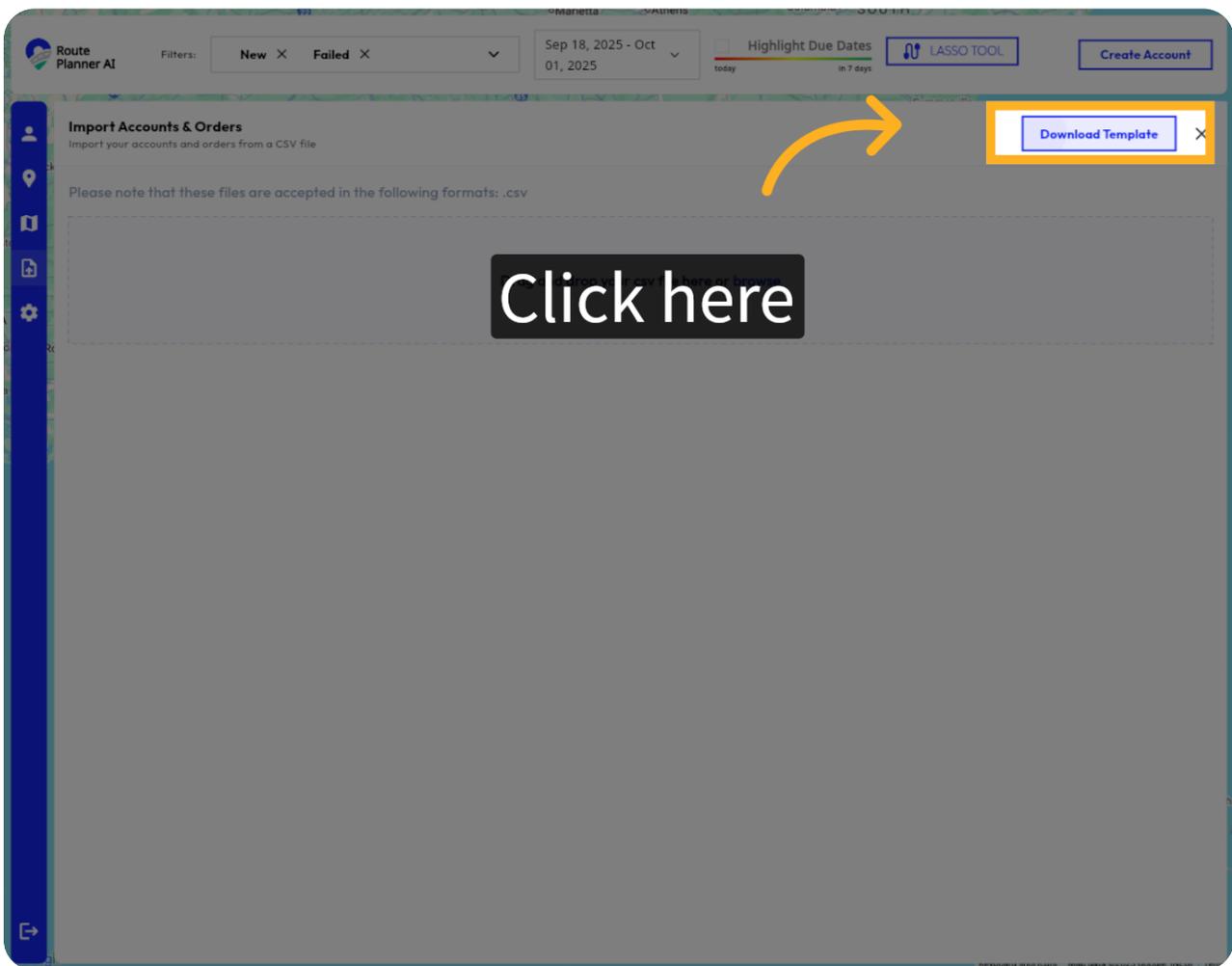
Route Planner AI supports bulk imports from an Excel sheet, making it easy to load all your customers and their first orders in one step.

To get started, click the **Import Data** icon on the left-hand side of the screen.



## 02 Click Download Template

Next, click the **Download Template** button. This will download an Excel file to your computer in the exact format required for importing.



### 03 View Sample Data for the correct format

The template includes two sample rows to show you the structure — you can delete those before doing your own import.

Possible Data Loss Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

account_name	account_type	account_phone	account_email	account_main_contact_name	account_street1	account_city	account_state	account_zip_code	account_delivery_quantity	account_pickup_quantity	order_bus_date	order_recurrence	order_service_preferences
Sample Business Account	business	1-555-123-4567	business@samplecompany.com	John Smith	123 Broadway Street	New York	NY	10001	50	25	8/9/25		
Sample Individual Account	individual	1-555-987-6543	individual@example.com	John Smith	456 5th Avenue	New York	NY	10018	10	5	12/25/25	weekly	Leave at front door



## 05 Order Fields Overview

- **Account Delivery Quantity** – the default number of units delivered for this customer. Optional; leave blank if not needed.
- **Account Pickup Quantity** – the default number of units picked up for this customer. Also optional.
- **Order Due Date** – the due date for the first order.
- **Order Recurrence** - use this to create repeating orders. The available recurrence options are:•Daily•Weekly•Monthly•Yearly
- **Order Service Preferences** - a free text field that allows you to create service preference instructions for the customer. This will be copied automatically to any orders created for the customer, and will be visible to drivers on the mobile app when completing a route.

	J	K	L	M	N
	account_delivery_quantity	account_pickup_quantity	order_due_date	order_recurrence	order_service_preferences
L	50	25	8/5/25		
3	10	5	12/25/25	weekly	Leave at front door

## 06 Multiple Orders for a Customer

If you would like to create multiple orders for your Customer that do not automatically repeat, you can do this by creating multiple rows with the same Account details (Name, Address, Contact Details) but with different information in the Order Due Date (column L) or Order Recurrence (column M)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	account_name	account_type	account_phone	account_email	account_main_contact_name	account_street1	account_city	account_state	account_zip_code	account_delivery_quantity	account_pickup_quantity	order_due_date	order_recu
2	Tallahassee Textiles	Business	850-555-3030	sales@tattytextiles.com	John Miller	799 Tennessee St	Tallahassee	FL	32304	15	5	10/9/25	
3	Seminole Supplies	Business	850-555-1010	info@seminolesupplies.com	Mark Johnson	123 Gaines St	Tallahassee	FL	32301	10	0	10/1/25	
4	Seminole Supplies	Business	850-555-1010	info@seminolesupplies.com	Mark Johnson	123 Gaines St	Tallahassee	FL	32301	5	0	10/3/25	
5	Sunshine Pool Services	Individual	850-555-4040	sunshinepools@gmail.com	Maria Gonzalez	1010 Magnolia Dr	Tallahassee	FL	32308	0	3	10/7/25	
6	Sunshine Pool Services	Individual	850-555-4040	sunshinepools@gmail.com	Maria Gonzalez	1010 Magnolia Dr	Tallahassee	FL	32308	0	2	10/21/25	
7	Leon Local Market	Business	850-555-5050	contact@leonlocalmarket.com	David Harris	222 Market St	Tallahassee	FL	32312	20	0	10/6/25	Daily

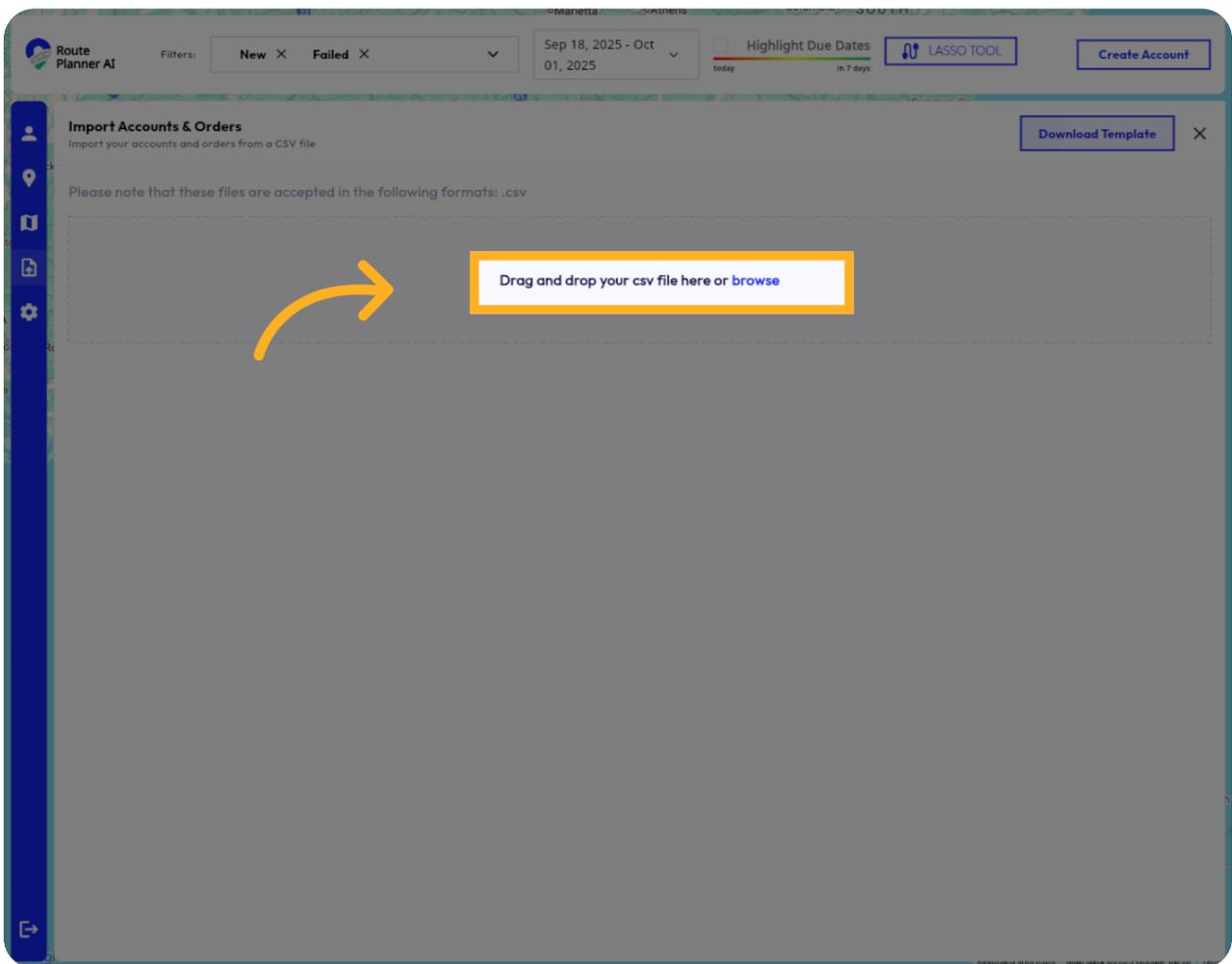
## 07 Save as CSV UTF-8

Save the file in the file format 'CSV UTF-8'

File Format: CSV UTF-8 (Comma delimited) (.csv) 

## 08 Drag and Drop File or click 'Browse'

Back on the import screen, either click **Browse** to select your file or drag and drop it into the upload area.



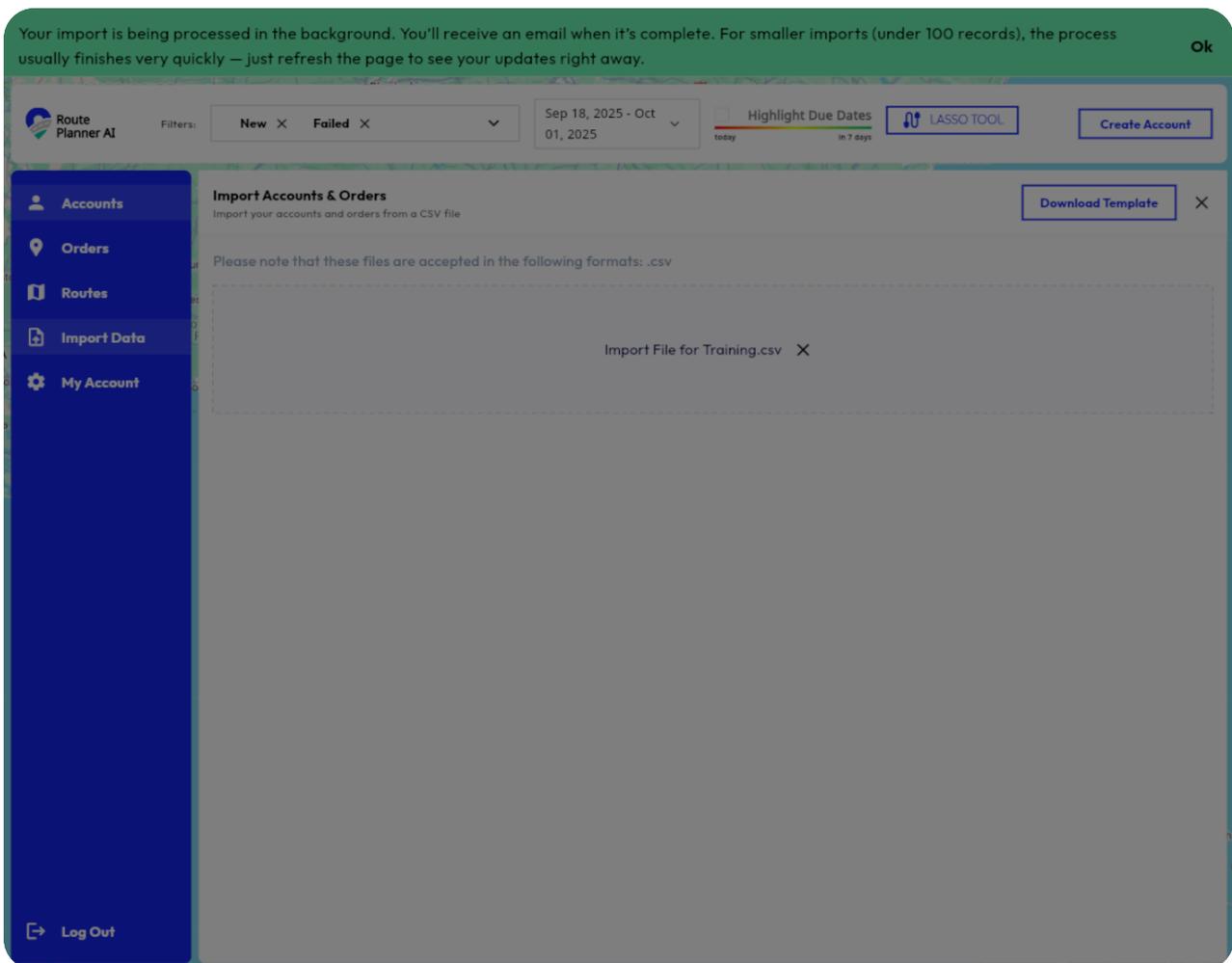
## 09 Green Message

A green message at the top will confirm that the import has started.

- For imports of fewer than 100 accounts, the process is almost instant — just refresh the screen to see your new accounts and orders.
- For imports of more than 100 accounts, it may take a few minutes. You'll receive an email notification once the import is complete.

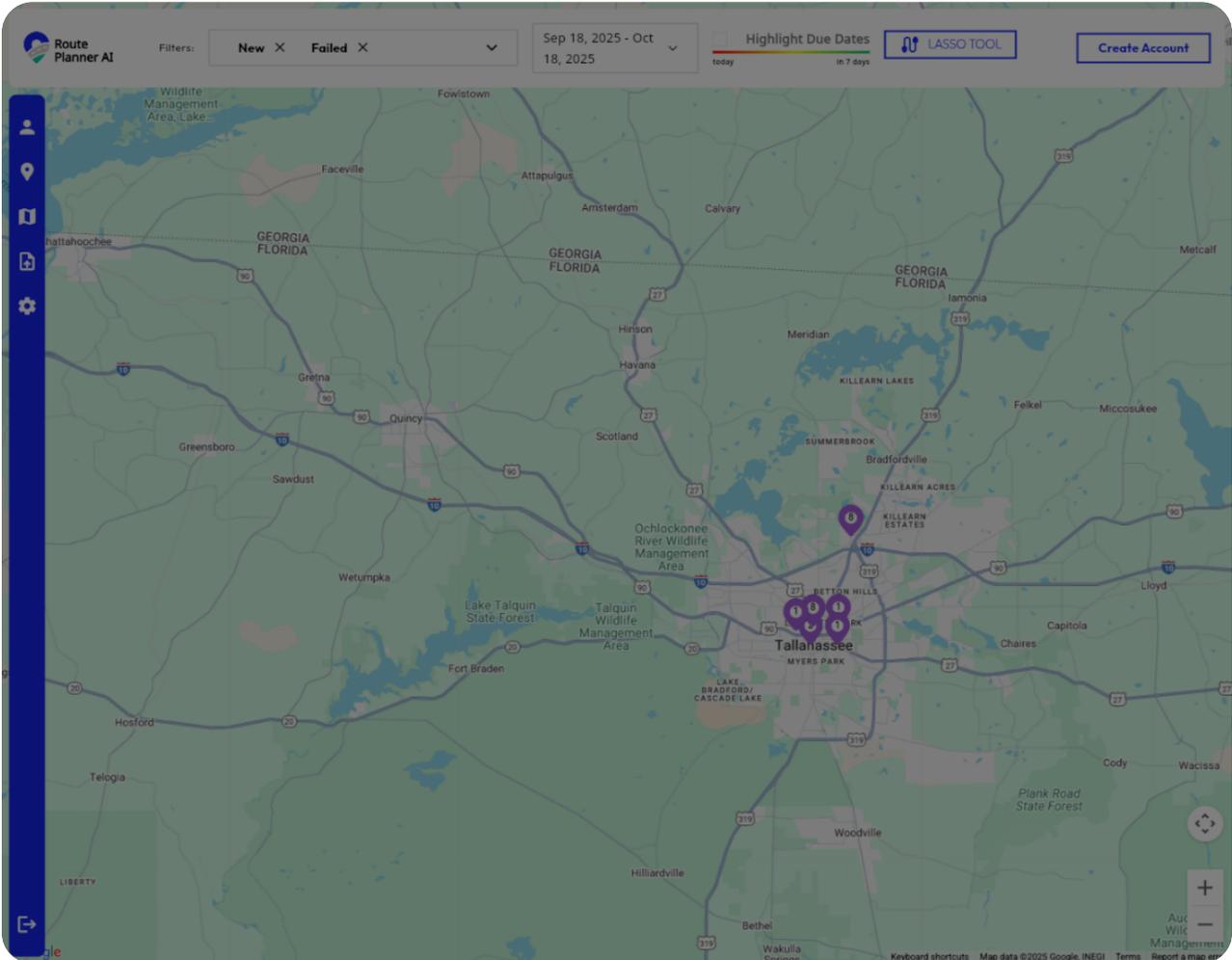
If the import fails, you'll also receive an email with an attached file explaining the reason — usually a simple formatting issue in the spreadsheet.

And remember, if you run into challenges, you can always contact us through the **Contact Us** page at [routeplannerai.io](https://routeplannerai.io).



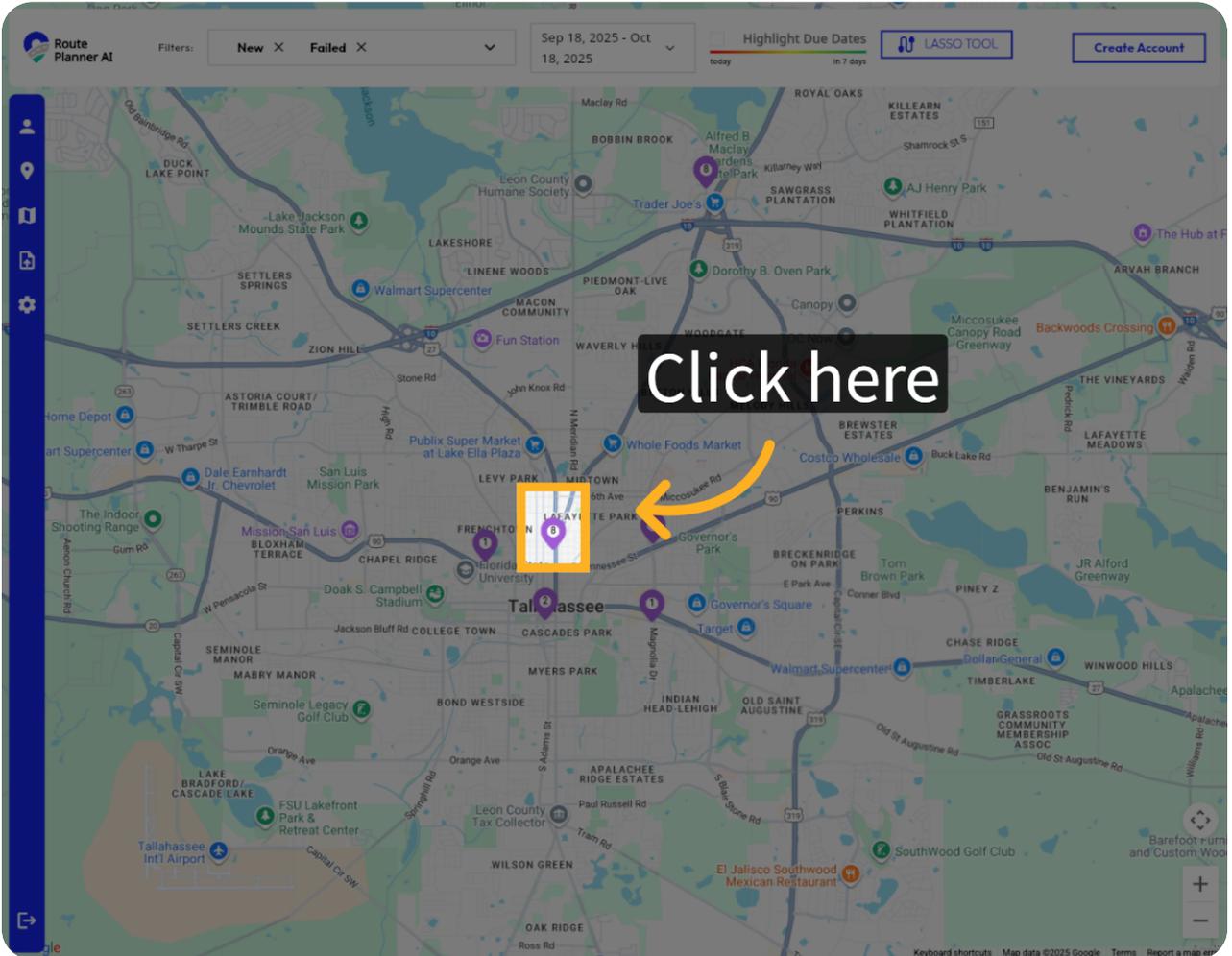
## 10 View Orders

After refreshing, your imported orders will appear in the filtered map view.



# 11 Click on a pinpoint

Click on any of the Pinpoints



## 12 View Order Summary

You will be taken to all Orders for that Account, filtered by Date and Status. If you created an Account with multiple orders or repeating, recurring orders, the recurring Orders for the filtered date range will appear here.

The screenshot displays the 'Route Planner AI' interface. At the top, there are filters for 'New' and 'Failed' orders, a date range of 'Sep 18, 2025 - Oct 18, 2025', and a 'Highlight Due Dates' indicator. A 'LASSO TOOL' and 'Create Account' button are also visible. The main content area is titled 'Capitol Coffee Roasters' and shows a 'Summary' tab with 'Orders' selected. Below this, there is a section for 'Total Completed Orders' (0) and a search bar. The main table lists several orders, all with a status of 'New' and a delivery quantity of '0 / 0'. The orders are for the address '456 Monroe St., Tallahassee, FL, 32303' and are scheduled for dates from October 01, 2025, to October 06, 2025. A sidebar on the left contains navigation options: 'Accounts', 'Orders', 'Routes', 'Import Data', and 'My Account'. At the bottom of the sidebar is a 'Log Out' button. The background shows a map of the Tallahassee area.

Order ID	Address	Due Date	Order Status	Delivery Qty
68d51fad256f946b6f3f14e	456 Monroe St., Tallahassee, FL, 32303	October 01, 2025	New	0 / 0
68d51fad256f946b6f3f153	456 Monroe St., Tallahassee, FL, 32303	October 02, 2025	New	0 / 0
68d51fad256f946b6f3f157	456 Monroe St., Tallahassee, FL, 32303	October 03, 2025	New	0 / 0
68d51fad256f946b6f3f15b	456 Monroe St., Tallahassee, FL, 32303	October 04, 2025	New	0 / 0
68d51fad256f946b6f3f15f	456 Monroe St., Tallahassee, FL, 32303	October 05, 2025	New	0 / 0
68d51fad256f946b6f3f163	456 Monroe St., Tallahassee, FL, 32303	October 06, 2025	New	0 / 0

## 13 Change filters if required

If you wish to see more Orders for the Account, you can change the Status and the Due Date filter at the top of the Order summary

The screenshot shows the 'Route Planner AI' interface. At the top, there are filters for 'New' and 'Failed' orders, and a date range filter set to 'Sep 18, 2025 - Oct 18, 2025'. A search bar and an '+ Add New Order' button are also visible. The main content area shows a list of orders for 'Capitol Coffee Roasters' with columns for Order ID, Address, Due Date, Order Status, and Delivery Qty. The orders listed are all 'New' and have a delivery quantity of 0/0.

Order ID	Address	Due Date	Order Status	Delivery Qty
68d51fad256f946b6f3f14e	456 Monroe St., Tallahassee, FL, 32303	October 01, 2025	New	0 / 0
68d51fad256f946b6f3f153	456 Monroe St., Tallahassee, FL, 32303	October 02, 2025	New	0 / 0
68d51fad256f946b6f3f157	456 Monroe St., Tallahassee, FL, 32303	October 03, 2025	New	0 / 0
68d51fad256f946b6f3f15b	456 Monroe St., Tallahassee, FL, 32303	October 04, 2025	New	0 / 0
68d51fad256f946b6f3f15f	456 Monroe St., Tallahassee, FL, 32303	October 05, 2025	New	0 / 0
68d51fad256f946b6f3f163	456 Monroe St., Tallahassee, FL, 32303	October 06, 2025	New	0 / 0

That is how you import Accounts & Orders in Route Planner AI

Powered by [guidde](#)