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Import Accounts
Records > Accounts > New/Import

You can create new accounts by importing from an external list. To add the account number to an Excel, CSV, or text file, you simply need to specify the number.

Action: Select **Import Accounts**.

Connector type: Defines the communication method, protocol, or interface used to access and retrieve the data.

Connection string: A string of text that specifies the information needed to establish a connection between the software and the data source, such as a database file or external service. It acts like a set of instructions or a **key** that tells the software to locate and access the data it needs to import.

Reference columns by: Determines how the columns in your data are identified during the import process.

- **Reference by Name:** This means you use the column header or the column name to refer to data.

- **Reference by Number:** This means you refer to columns based on their position or index within the dataset. Instead of using the column name, you refer to the column by its numerical position.

Account column: Specify which column in the import file contains the account number to be imported. Based on the above Reference columns by value selected, identify the column by its heading o**r column** number.