What Is This?

You upload your customer list, and none of them get your welcome voucher or welcome message. This is on purpose, not a fault. This page explains which imports skip the welcome, which don't, and how to treat your imported customers instead.

How It Works

The welcome is meant for new sign-ups. An import adds many people at once, often your whole history. If the welcome ran for each of them, hundreds of regulars would get a voucher and a message meant for brand-new customers. That wastes vouchers and messages, and confuses your regulars.

Which imports skip the welcome

How the customer was added	Gets the welcome?
Signs up on the customer portal or a sign-up form	Yes
Your staff add them one by one under **CRM → Customers**	Yes
The customer list import, under **CRM → Customers**	No
A transactions import, for a phone number not saved yet	Voucher yes. The message usually no, because the customer already has a purchase.
A redemptions import, for a phone number not saved yet	Yes
An iVend POS customer import	Yes

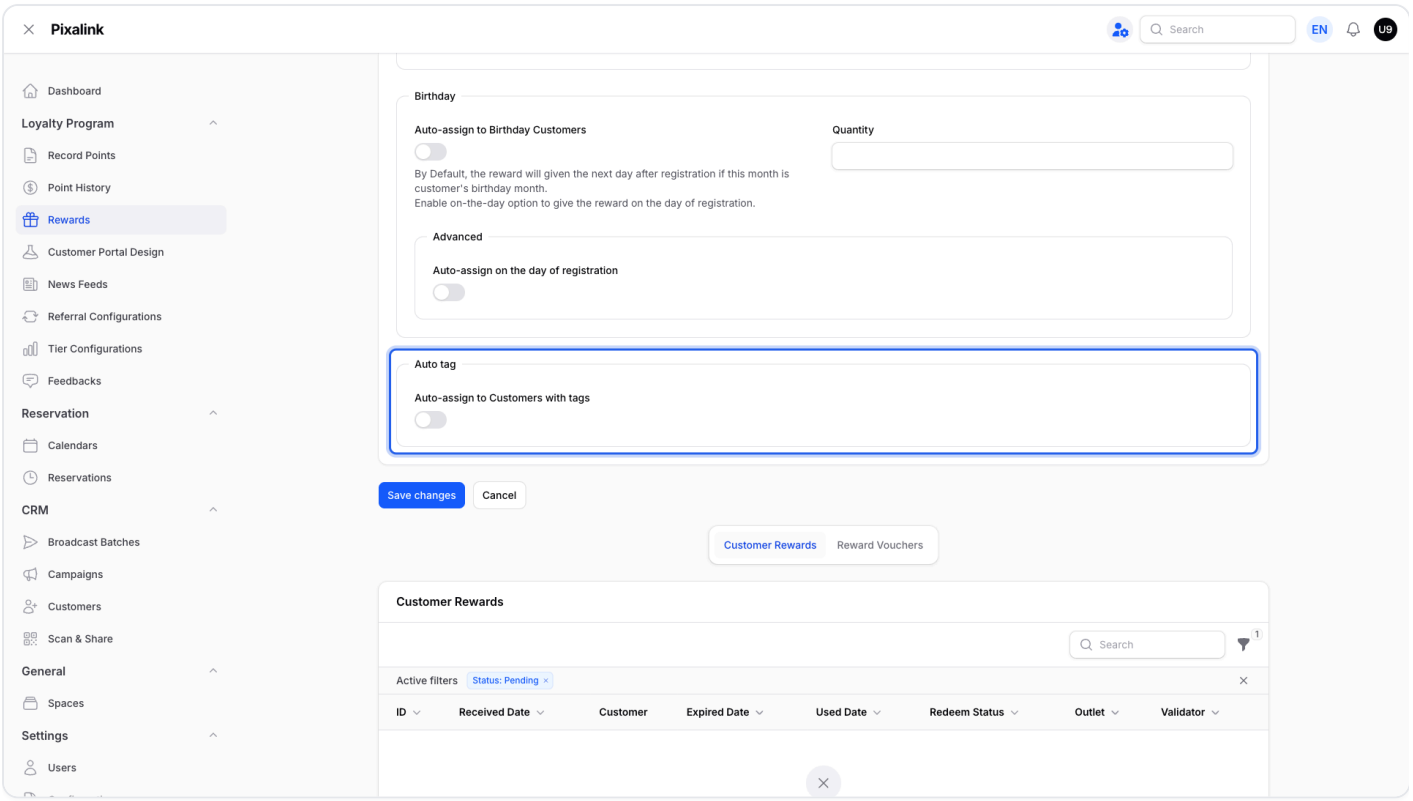
The skip only covers the customer list import. A transactions or redemptions file creates any phone number it hasn't seen before. That new customer can get the welcome voucher and its notification, just like a real sign-up.

How to treat your imported customers

- Add a tag to them in the import, with a **Tags** column in your file. You can also select them later and use **Add Tags**.
- Turn on **Auto-assign to Customers with tags** on an active, free reward, for that tag. Each customer with the tag who doesn't hold the reward yet gets the quantity you set.
- Send a campaign to that same tag.

You choose exactly who gets the treat, and no one gets it twice. How to Send a Welcome Back Voucher to Imported Regulars (https://kb.pixalink.io/articles/how-to-send-a-welcome-back-voucher-to-imported-regulars)

walks you through it.



Auto-assign to Customers with tags is on the reward's Automations tab.

Real-Life Example

Farah runs Petal & Stem, a florist in Subang. She sets up a welcome voucher for new sign-ups. Then she imports her list of 400 regulars and waits for the vouchers to go out. Nothing happens, and she worries it is broken. It isn't: the customer list import skips the welcome on purpose. Farah tags the 400 regulars "imported-regulars" and gives that tag a free posy voucher. All 400 get it once, with a thank-you message.

Good to Know

- **Import customers before transactions.** Finish and check the customer list import first. Any phone number in a transactions file that isn't a customer yet is created on the spot, and can get the welcome.
- **Tick Skip unregistered customers** when you upload a transactions file. Rows for unknown numbers are then skipped instead of creating new customers.
- **Don't import the same list twice.** Phone numbers already in your list are rejected, unless you turn on the option to update customers. Then the file overwrites details you've edited.
- **Don't delete a customer to force a welcome.** Deleting erases their points, credits, vouchers and history for good.

Need Help?

If you have past points to bring over as well, the order of imports matters. Ask the Pixalink team to check your files before you upload transactions, so no imported number gets a welcome by mistake.

What's Next?

- Set Up Welcome Messages and Vouchers for New Customers (https://kb.pixalink.io/articles/set-up-welcome-messages-and-vouchers-for-new-customers)
- How to Send a Welcome Back Voucher to Imported Regulars (https://kb.pixalink.io/articles/how-to-send-a-welcome-back-voucher-to-imported-regulars)
- How to Import Customers with Historical Loyalty Points (https://kb.pixalink.io/articles/how-to-import-customers-with-historical-loyalty-points)