

Import Addressbook Notes

Pre-Conditions:

- **Customer Addressbook** and **Service Location** have been imported successfully.
- Use the **Addressbook Notes** template with the columns in the table below. We need the **Customer ID*** and **Service Location ID*** (only applicable if the customer has multiple service locations) from the previous import. For the current import, we need the **Notes**.
- The file should not have duplicate records. If it does, please note that they will be imported separately.
- Check for bad data in the file in Note and Date columns. We cannot check all the bad data in the file especially when it has over a thousand records. Let the customer know about the discrepancies found and have them confirm if they want to have it imported as-is. Else they to fix the data in the file.
- Make sure to delete the column names before you import them into Industrack. Otherwise, it will cause issues during the import.
- Please make sure the date is in mm/dd/yyyy format.

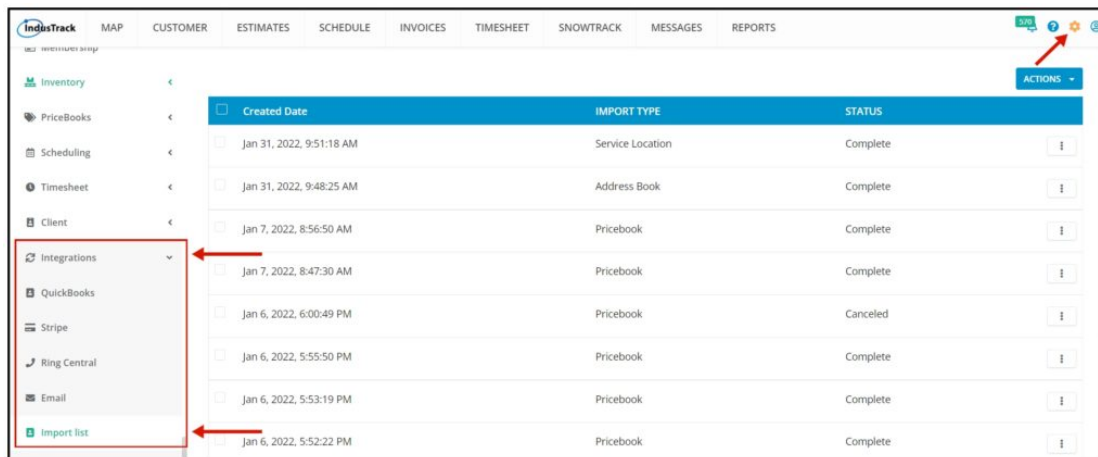
SERVICE LOCATION IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

Customer Number/Customer ID*	Service Location ID*	Note	Date
1	3	Sammy Joe notes	2/25/2022

How to Import Addressbook Notes

1. Go to Settings > Integrations > Import List > ACTIONS > **Import Addressbook Notes**



On the Import List Page click on Actions, and on the drop-down select **Import Addressbook Notes**

Created Date	IMPORT TYPE	STATUS
Jan 31, 2022, 9:51:18 AM	Service Location	Complete
Jan 31, 2022, 9:48:25 AM	Address Book	Complete
Jan 7, 2022, 8:56:50 AM	Pricebook	Complete
Jan 7, 2022, 8:47:30 AM	Pricebook	Complete
Jan 6, 2022, 6:00:49 PM	Pricebook	Canceled
Jan 6, 2022, 5:55:50 PM	Pricebook	Complete
Jan 6, 2022, 5:53:19 PM	Pricebook	Complete
Jan 6, 2022, 5:52:22 PM	Pricebook	Complete

2. An Import Addressbook Notes window will pop up. Select your Timezone, Click Upload and select the correct Excel file to be imported.

Import AddressBook Notes

Timezone *

Select a File to upload

UPLOAD

CANCEL SAVE

3. Map the corresponding column names in the file then click **Save**.

Import AddressBook Notes

Select a File to upload

EXTERNAL CUSTOMER

EXTERNAL LOCATION ID

NOTE

DATE

1 3 Sammy Joe notes 25-Feb-2022

CANCEL SAVE

4. After the file has been uploaded, the status should be **COMPLETE**. To verify if the upload is successful, click on the 3 dots beside status and click details.

Note that if the Data has thousands of records, it may take a while for the status to change into COMPLETE.

Created Date	IMPORT TYPE	STATUS
Feb 11, 2022, 9:59:26 AM	Customer Notes	Complete
Feb 11, 2022, 9:54:42 AM	Address Book	Complete
Feb 8, 2022, 10:49:33 AM	Inventory Part	Complete

5. By clicking on **details**, if all rows were successfully imported you should be able to see it here. The number of **All Rows** and the **number of successful** rows should match.



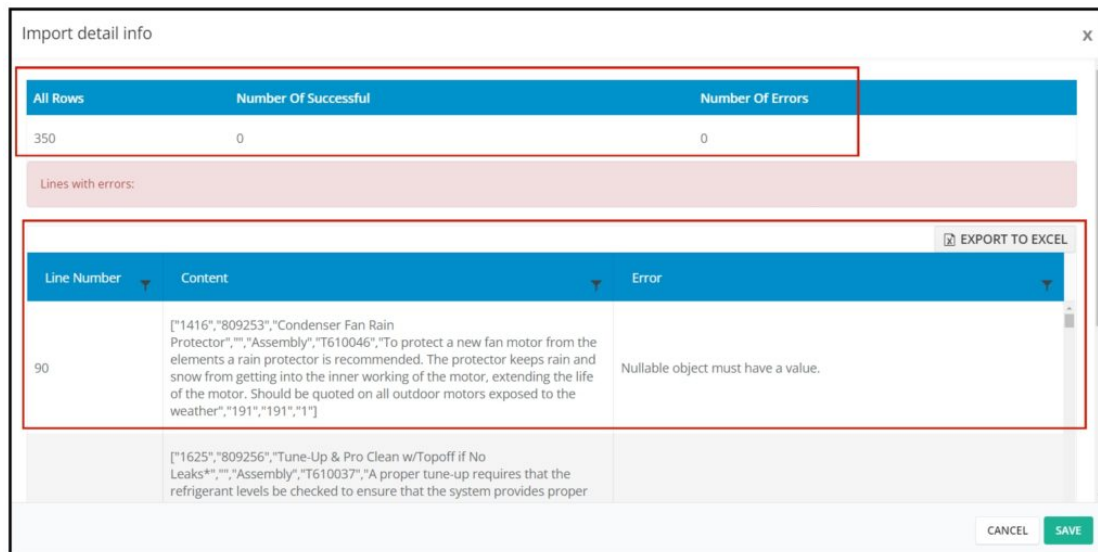
Import detail info

All Rows	Number Of Successful	Number Of Errors
3	3	0

CANCEL SAVE

6. If all Rows were successfully imported, do a spot check in the Customer Module> select certain customer> Notes tab, and verify the information imported is ACCURATE.

7. If unsuccessful, rows with the error will not be uploaded and the number of successful rows will not be the same as the total number of rows in the file. This is what happens if you import files with Bad Data.



Import detail info

All Rows	Number Of Successful	Number Of Errors
350	0	0

Lines with errors:

Line Number	Content	Error
90	["1416","809253","Condenser Fan Rain Protector","","Assembly","T610046","To protect a new fan motor from the elements a rain protector is recommended. The protector keeps rain and snow from getting into the inner working of the motor, extending the life of the motor. Should be quoted on all outdoor motors exposed to the weather","191","191","1"]	Nullable object must have a value.
	["1625","809256","Tune-Up & Pro Clean w/Topoff if No Leaks*","","Assembly","T610037","A proper tune-up requires that the refrigerant levels be checked to ensure that the system provides proper	

EXPORT TO EXCEL

CANCEL SAVE

8. You will be able to see the line number in your file where the error is located and the line's content. The detail of the error is also explained in the error tab.

9. You can export the error detail to excel and determine what is causing the error.

10. After the error is determined, edit your Service location File remove bad data then reimport back again.