## **Import Service Location**

## **Pre-Conditions:**

- Customer Addressbook has been imported successfully.
- We need the Customer ID from the previous Addressbook import to act as the unique identifier that will
  associate the service locations to its certain customers.
- Use the Service Location template with the columns in the table below. For the current import, we need the Customer ID from the previous Customer Addressbook Import, Customer Name, Contact Name, Email, Phone number, Street, City, State, ZIP.
- If Jobs, Job Tasks, Invoices, and Addressbook Equipment are not linked to a service location for future import, then leave the Service Location ID blank. If you do, Service Location ID must be filled out. If you don't have Service Location ID information, you have to generate your own IDs.
- If the customer has multiple contact numbers, please note that the system only supports 2 which are Phone and Mobile.
- 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 i.e. multiple contact numbers in the Phone column, Multiple names. Bad Data can cause an unsuccessful import.
- Make sure to delete the column names before you import them into Industrack. Otherwise, it will cause issues during the import.

#### SERVICE LOCATION IMPORT TEMPLATE

Note that columns with (asterisk) \* are required.

Customer Number/Customer ID/ External Addressbook ID*	Service Location ID/ External ID*	Location Name	Contact Name	Phone*	Email	Street*	City*	State*	Zip*
1	1	Second Location	Blake Carrington	(864) 306-8129	blake@ca.com	163 Antony Dr	Jackson	GA	30233
1	2	Third Location	Adam Carrington	(334) 692-3253	adam@ca.com	5071 Cline Rd	Resaca	GA	30735
1	3	Fourth Location	Sammy Joe	(352) 490-9410	sammy/@ca.om	409 Dale Dr	Vienna	GA	31092
1	4	Fifth Location	Joseph Anders	678) 530-9614	Josepha@ca.com	2106 Peachford Cir	Atlanta	GA	30338
1	5	Sixth Location	Cristal Flores	(404) 624-1737	Cristal@ca.com	330 Kendrick Ave SE	Atlanta	GA	30315

### How to Import Service Location

1. Go to Settings > Integrations > Import List > ACTIONS > Import Service Locations.

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE INVO	CES TIMESHEET	SNOWTRACK	MESSAGES	REPORTS		···· @ # @
M Inventers									ACTIONS -
Beles Basks		Created Da	te		IMPORT 1	TYPE		STATUS	
Cheduling		Jan 31, 2022	2, 9:51:18 AM		Service Lo	ocation		Complete	1
Timesheet	¢	Jan 31, 2022	2, 9:48:25 AM		Address E	Book		Complete	1
Client	¢	an 7, 2022.	8:56:50 AM		Pricebook			Complete	
$\mathcal B$ Integrations	~ <	Jan 7 2022	9-47-20 AM		Dricebook			Complete	
QuickBooks		jui 1, 2022,	0.47.30 AM		FILEBOOK			complete	1
🗃 Stripe		Jan 6, 2022,	6:00:49 PM		Pricebook			Canceled	1
🧈 Ring Central		Jan 6, 2022,	5:55:50 PM		Pricebook			Complete	1
🗃 Email		Jan 6, 2022,	5:53:19 PM		Pricebook			Complete	1
Import list	-	Jan 6, 2022,	5:52:22 PM		Pricebook			Complete	1

On the Import List Page click on Actions, and on the drop-down select Import Service Locations.

Knowledgebase

IndusTrack MAP	CUSTOMER	R ESTIMATES	SCHEDULE INVOID	EES TIMESHEET SNOWTR	ACK MESSAGES	REPORTS	₽ <u>₽</u> ₽ 😧 🔅
H Inventory	٢						
PriceBooks	<	Created Date	e	Ű	APORT TYPE	STATUS	+ Import Address Books
Scheduling	<	Jan 31, 2022,	, 9:51:18 AM	s	ervice Location	Complete	+ Import Service Locations
O Timesheet	٩	Jan 31, 2022,	, 9:48:25 AM	A	ddress Book	Complete	+ Import Jobs + Import Job Tasks
🗄 Client	٠	Jan 7, 2022, 8	8:56:50 AM	P	ricebook	Complete	+ Import Invoices
$\mathcal C$ integrations	*	Jan 7, 2022, 8	8:47:30 AM	P	icebook	Complete	+ Import AddressBook Equipments
QuickBooks		Jan 6, 2022, 6	6:00:49 PM	Ρ	ricebook	Canceled	Import Non-inventory Part
J Ring Central		Jan 6, 2022, 5	5:55:50 PM	P	ricebook	Complete	+ Import Inventory Part
🗃 Email		Jan 6, 2022, 5	5:53:19 PM	P	ricebook	Complete	+ Import Pricebook
Import list		Jan 6, 2022, 5	5:52:22 PM	P	ricebook	Complete	+ Import AddressBook Notes

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

Import Service Locations		Х
Timezone *	Timezone *	*
Select a File to upload		L UPLOAD
		CANCEL SAVE

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

mport Service Lo	ocation	IS							)
Select a File to uplo	ad							<b>±</b> U	PLOAD
Customer ID	•	Service Location ID 💌	Customer Name 🔹	Contact Name	•	Phone	Ŧ	Email	•
1		1	Second Location	Blake Carrington		(864) 306-8129		blake@ca.com	1(
1		2	Third Location	Adam Carrington		(334) 692-3253		adam@ca.com	5
1		3	Fourth Location	Sammy Joe		(352) 490-9410		sammyj@ca.om	41
1		4	Fifth Location	Joseph Anders		678) 530-9614		Josepha@ca.com	2.
1		5	Sixth Location	Cristal Flores		(404) 624-1737		Cristal@ca.com	3:
•									•
								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.

				ACTIONS -
	Created Date	IMPORT TYPE	STATUS	
	Jan 28, 2022, 2:32:45 PM	Service Location	Complete	1
0	Jan 28, 2022, 2:19:19 PM	Non-Inventory Part	Complete	Detail Cancel

# 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 inf	0	х
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> location 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.

All Rows	Number Of Successful	Number Of Errors	
350	0	0	
Lines with errors:			
			EXPORT TO EXC
Line Number	Content	Error	τ.
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		

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.