

# 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.

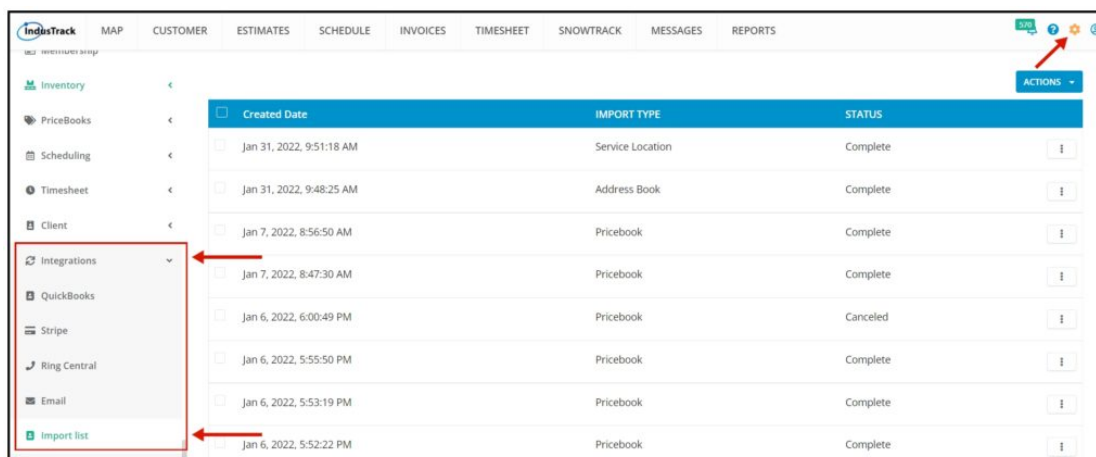
## SERVICE LOCATION IMPORT TEMPLATE

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

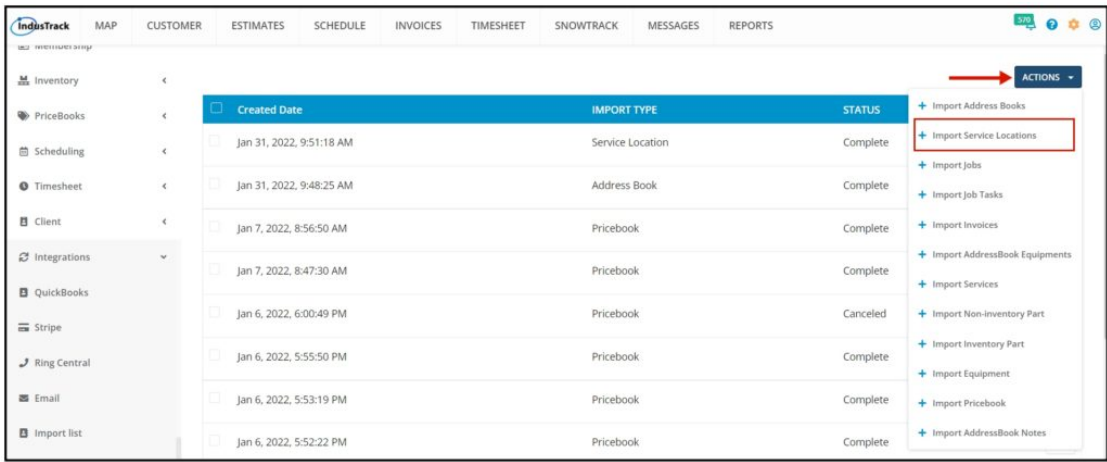
Customer Number/Customer ID/ External Addressbook ID*	Service Location ID/ External ID*	Location Name	Contact Name	Phone*	Email	Street*	City*	State*	Zip*
1	1	Second Location	Blake Carrington	(864) 306-8129	<a href="mailto:blake@ca.com">blake@ca.com</a>	163 Antony Dr	Jackson	GA	30233
1	2	Third Location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

## How to Import Service Location

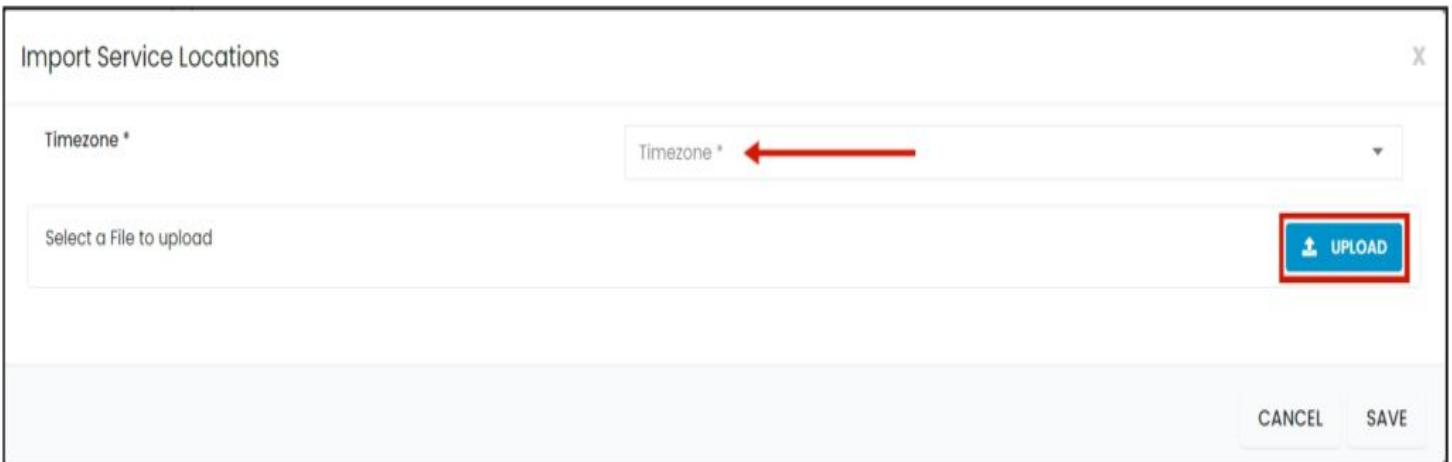
1. Go to Settings > Integrations > Import List > ACTIONS > **Import Service Locations**.



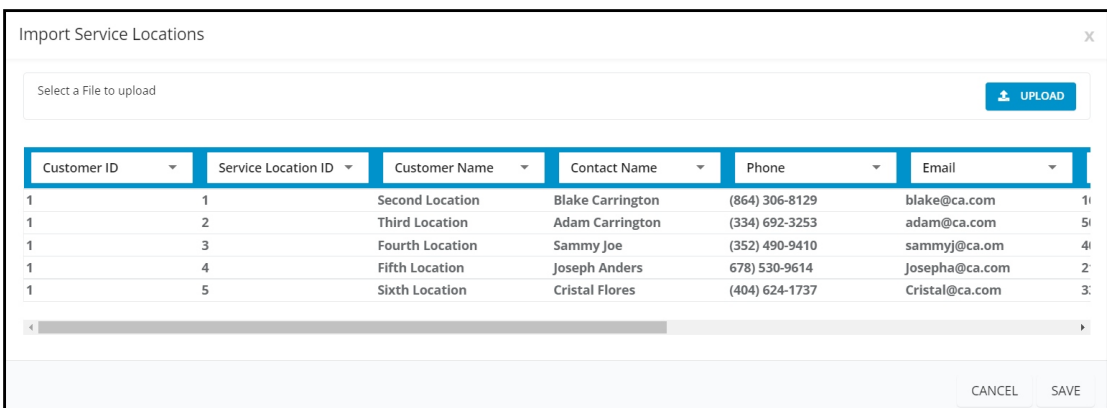
On the Import List Page click on Actions, and on the drop-down select **Import Service Locations**.



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



3. Map the corresponding column names in the file then click **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	ACTIONS
Jan 28, 2022, 2:32:45 PM	Service Location	Complete	Detail Cancel
Jan 28, 2022, 2:19:19 PM	Non-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.

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:

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.