

# Import Flat Rate Pricebook

## Pre-Conditions:

- Use the **Pricebook** template with the columns in the table below. We need the **Pricebook ID**, **Parent ID**, **Name**, and **Item Type** of the Price books to be imported successfully.
- 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. 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 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.

## FLAT RATE PRICEBOOK IMPORT TEMPLATE

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

Pricebook ID*	Parent ID*	Name*	Image URL	Item Type*	SKU	Sales Description	Sales Price	Cost	Quantity
195409	0	Heating	https://s3.us-east-2.amaz...	Category	1	Heating	0	0	0
764217	195409	FORCED AIR HEATING	https://s3.us-east-2.amaz...	Category	2	FORCED AIR HEATING	0	0	0
764218	764217	DUCTWORK21	https://s3.us-east-2.amaz...	Category	3	DUCTWORK21	0	0	0
1	764218	12" - 20" starting collar		Assembly	T600385	The duct system is how the condit	217	217	1
2	764218	4" - 8" 30 Gauge 90		Assembly	T600386	The duct system is how the condit	206	206	1
3	764218	9" - 12" 30 Gauge 90		Assembly	T600387	The duct system is how the condit	223	223	1
4	764218	14" - 16" 30 Gauge 90		Assembly	T600388	The duct system is how the condit	256	256	1
5	764218	18" - 20" 30 Gauge 90		Assembly	T600389	The duct system is how the condit	289	289	1

## How to Import Flat Rate Pricebooks

1. Go to Settings > Integrations > Import List > ACTIONS > **Import Pricebook**.

The screenshot displays the IndusTrack interface. On the left, the 'Integrations' menu is expanded, and 'Import list' is selected. The main area shows a table of import records. The table has columns for 'Created Date', 'IMPORT TYPE', and 'STATUS'. The records include various import types such as 'Service Location', 'Address Book', and 'Pricebook'. The 'ACTIONS' dropdown menu is located in the top right corner of the table area.

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

The screenshot shows the IndustryTrack interface with a list of pricebooks. The 'ACTIONS' menu is open, and 'Import Pricebook' is highlighted with a red box. A red arrow points to the 'ACTIONS' dropdown.

Created Date	IMPORT TYPE	STATUS
<input type="checkbox"/> Jul 11, 2022, 9:02:30 AM	Pricebook	Complete
<input type="checkbox"/> Jul 11, 2022, 8:25:28 AM	Pricebook	Canceled
<input type="checkbox"/> Jan 31, 2022, 11:35:11 AM	Service Location	Complete
<input type="checkbox"/> Jan 31, 2022, 9:51:18 AM	Service Location	Complete
<input type="checkbox"/> Jan 31, 2022, 9:48:25 AM	Address Book	Complete
<input type="checkbox"/> Jan 7, 2022, 8:56:50 AM	Pricebook	Complete
<input type="checkbox"/> Jan 7, 2022, 8:47:30 AM	Pricebook	Complete
<input type="checkbox"/> Jan 6, 2022, 6:00:49 PM	Pricebook	Canceled
<input type="checkbox"/> Jan 6, 2022, 5:55:50 PM	Pricebook	Complete
<input type="checkbox"/> Jan 6, 2022, 5:53:19 PM	Pricebook	Complete

3. An **Import Pricebook** window will pop up. Select your Timezone, Click Upload and select the correct Pricebook Excel file to be imported.

The screenshot shows the 'Import PriceBook' dialog box. It has a 'Timezone \*' dropdown menu with a red arrow pointing to it. Below the dropdown is a 'Select a File to upload' field. To the right of the field is a blue 'UPLOAD' button with a red border. At the bottom right are 'CANCEL' and 'SAVE' buttons.

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

The screenshot shows the 'Import PriceBook' dialog box with a table for mapping columns. The table has four columns: 'PriceBook Item/C...', 'Category Parent ID', 'Name', and 'Image Uri'. The 'Name' column is highlighted in blue. Below the table are 'CANCEL' and 'SAVE' buttons, with 'SAVE' highlighted in red.

PriceBook Item/C...	Category Parent ID	Name	Image Uri
195409	0	Heating	https://s3.us-east-2.amazonaws.com/profitrhino/logo/Heating.jpg
764217	195409	FORCED AIR HEATING	https://s3.us-east-2.amazonaws.com/profitrhino/nullcategoryimages/CA-004.jpg
764218	764217	DUCTWORK21	https://s3.us-east-2.amazonaws.com/profitrhino/subcatimages/crop_hftcxjvwgaC20228IS600415.jpg
1	764218	12" - 20" starting collar	

5. 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 ▾
<input type="checkbox"/> Created Date	IMPORT TYPE	STATUS	
<input type="checkbox"/> Jul 11, 2022, 9:02:30 AM	Pricebook	Complete	⋮
<input type="checkbox"/> Jul 11, 2022, 8:25:28 AM	Pricebook	Canceled	Detail ←
<input type="checkbox"/> Jan 31, 2022, 11:35:11 AM	Service Location	Complete	Cancel

6. If all Rows were successfully imported, do a spot check in the Settings> Pricebooks> Categories, Flat rate Pricebook, 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 **Pricebook** File remove bad data then reimport back again.