

# Import Invoices

## Pre-Conditions:

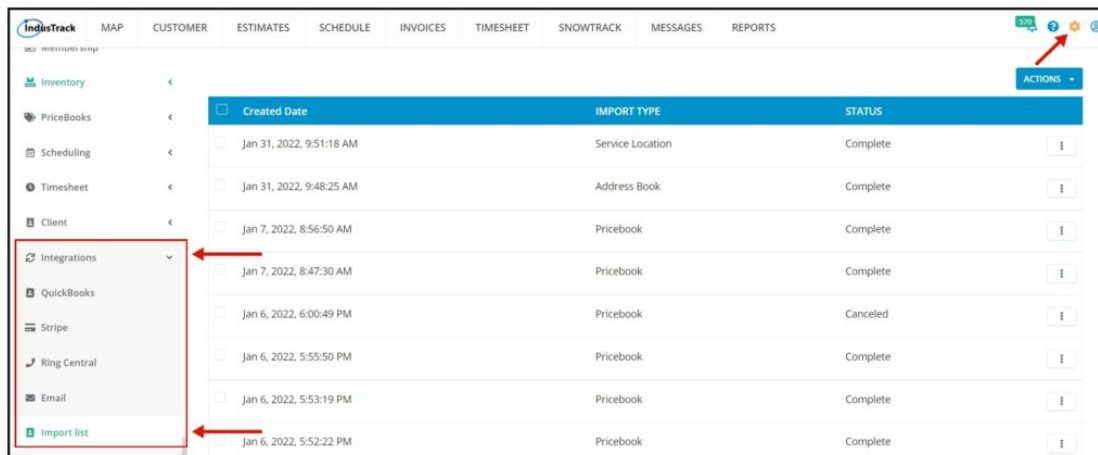
- **Customer Addressbook, Service Location, and Jobs** have been imported successfully.
- Use the **Invoice** template with the columns in the table below. We need the **Customer ID, Service Location ID, and Job ID** from the previous import. For the current import, we need the **Invoice ID, Notes, or other details in the template you want to get imported.**
- Note that the **Invoice ID must be filled out. If they don't have Invoice ID information, they have to generate their own IDs.**
- **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 Notes, Invoice Date columns, etc. 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.

## INVOICES IMPORT TEMPLATE

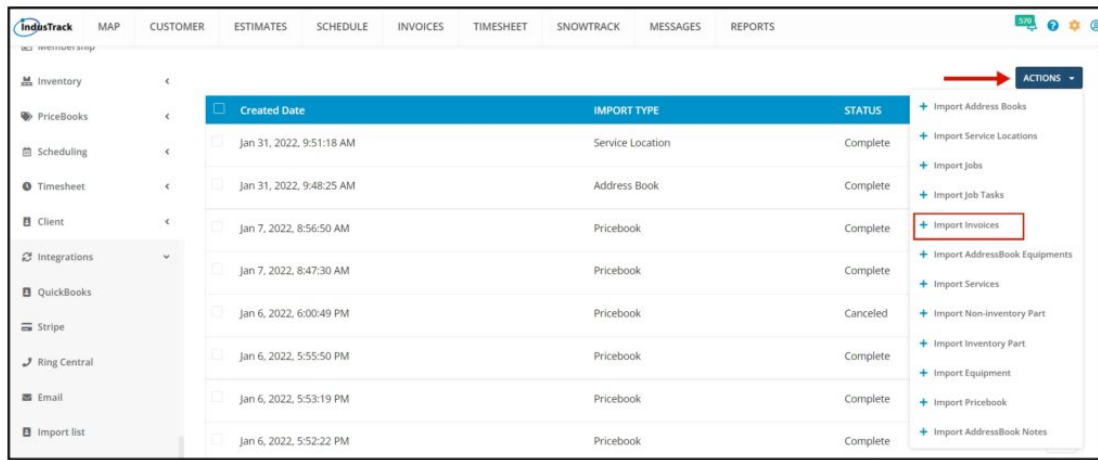
Invoice ID*	Service Location ID*	Customer Number/Customer ID*	Job ID*	Invoice Number	Customer Notes	Invoice Date	Tax	Total Price	Invoice description	line item description	Terms	Uername or Created by
1	3	1	1	1285	Please pay before the due	10/4/2010	10	825.78	AC Repair	FOUND UNIT LOW ON CH PROPOSAL		Jorji Williams

## How to Import Invoices

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



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



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 Invoices window will pop up. Select your Timezone, Click Upload and select the correct Excel file to be imported.



Import Invoices

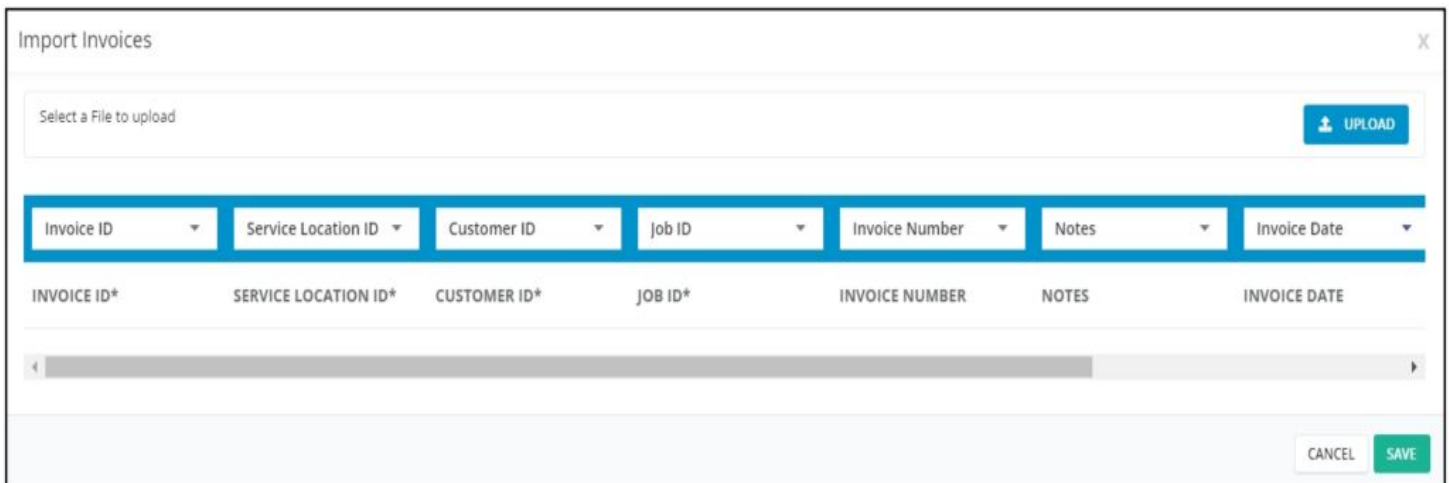
Timezone \* Timezone \*

Select a File to upload

**UPLOAD**

CANCEL SAVE

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



Import Invoices

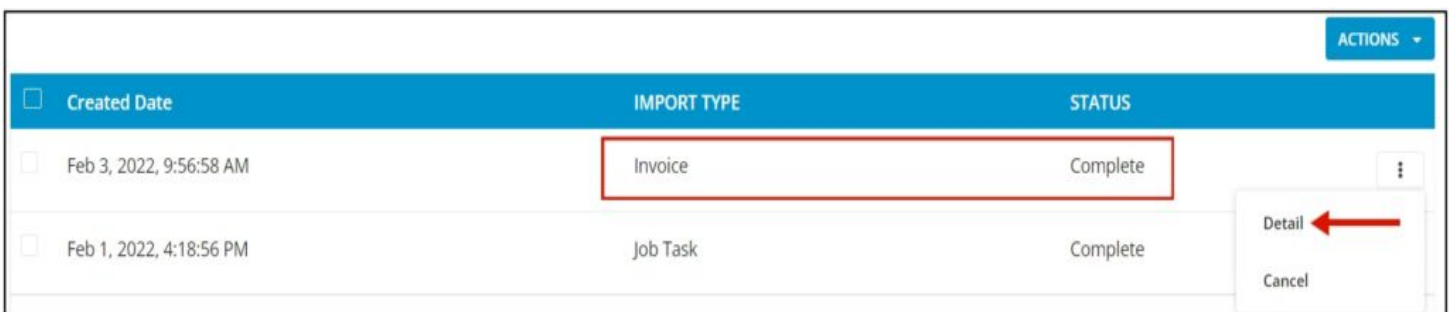
Select a File to upload UPLOAD

Invoice ID	Service Location ID	Customer ID	Job ID	Invoice Number	Notes	Invoice Date
INVOICE ID*	SERVICE LOCATION ID*	CUSTOMER ID*	JOB ID*	INVOICE NUMBER	NOTES	INVOICE DATE

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 3, 2022, 9:56:58 AM	Invoice	Complete
Feb 1, 2022, 4:18:56 PM	Job Task	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.



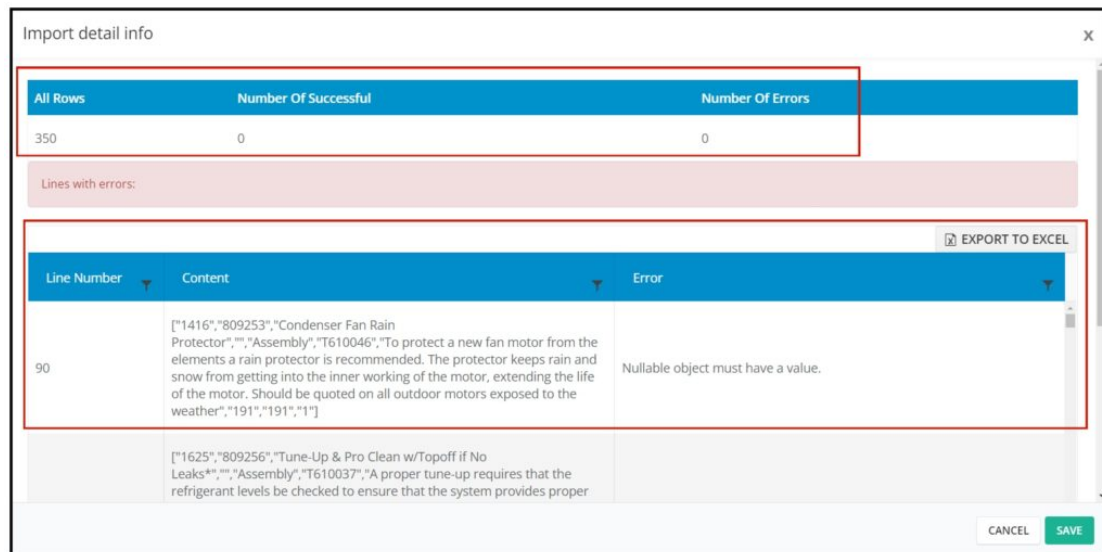
Import detail info

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> invoices 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 Invoice File remove bad data then reimport back again.