Import Job Tasks

Pre-Conditions:

- Customer Addressbook and Jobs have been imported successfully.
- Use the Jobs Tasks template with the columns in the table below. We need the Customer ID and Job ID from the
 previous import. For the current import, we need the Job Task ID and Description.
- Note that Job Tasks ID must be filled out. If they don't have Job Task 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 the Description column. We cannot check all 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

JOB TASK IMPORT TEMPLATE



How to import Job Tasks

IndusTrack MAP	CUSTOME	R ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	MESSAGES	REPORTS		₩ . 0 ¢ (
La Inventory	<									ACTIONS -
PriceBooks	¢	Created D	ite			IMPORT	туре		STATUS	
	¢	Jan 31, 202	2, 9:51:18 AM			Service L	ocation		Complete	1
O Timesheet	¢	Jan 31, 202	2, 9:48:25 AM			Address	Book		Complete	1
🛙 Client	٢	Jan 7, 2022	, 8:56:50 AM			Priceboo	k		Complete	1
Ø Integrations	~ <	Jan 7, 2022	, 8:47:30 AM			Priceboo	ık		Complete	1
QuickBooks		120 6 2022	, 6:00:49 PM			Priceboo	.te		Canceled	
🖬 Stripe										I
🧈 Ring Central		Jan 6, 2022	, 5:55:50 PM			Priceboo	ik.		Complete	I
🛎 Email		Jan 6, 2022	, 5:53:19 PM			Priceboo	ık		Complete	1
Import list		Jan 6, 2022	5:52:22 PM			Priceboo	k		Complete	1

1. Go to Settings > Integrations > Import List > ACTIONS > Import Job Tasks

On the Import List Page click on Actions, and on the drop-down select Import Job Tasks.

IndusTrack MAP	CUSTOMER	ESTIMATES SCHEDULE INVOICES	TIMESHEET SNOWTRACK MESSAGES REPORTS		57 <u>0</u> 😵 🌣
L Inventory	4				
PriceBooks	4	Created Date	IMPORT TYPE	STATUS	+ Import Address Books
Scheduling	<	Jan 31, 2022, 9:51:18 AM	Service Location	Complete	+ Import Service Locations
O Timesheet	¢	Jan 31, 2022, 9:48:25 AM	Address Book	Complete	+ Import Jobs
Client	<	Jan 7, 2022, 8:56:50 AM	Pricebook	Complete	+ Import Invoices
2 Integrations	~	Jan 7, 2022, 8:47:30 AM	Pricebook	Complete	+ Import AddressBook Equipments
QuickBooks					+ Import Services
Stripe		Jan 6, 2022, 6:00:49 PM	Pricebook	Canceled	+ Import Non-Inventory Part
PRing Central		Jan 6, 2022, 5:55:50 PM	Pricebook	Complete	+ Import Inventory Part + Import Equipment
S Email		Jan 6, 2022, 5:53:19 PM	Pricebook	Complete	+ Import Pricebook
Import list		Jan 6, 2022, 5:52:22 PM	Pricebook	Complete	+ Import AddressBook Notes

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

nport Job Tasks		
Timezone *	Timezone *	÷
Select a File to upload		L UPLOAT
		CANCEL SA

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

Import Job Tasks				х
Select a File to upload				1 UPLOAD
Job ID 👻	Task ID 👻	Customer ID 👻	Description	•
JOB ID*	JOB TASK ID*	CUSTOMER ID*	DESCRIPTION	
				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	
Feb 1, 2022, 4:18:56 PM	Job Task	Complete	
Jan 31, 2022, 12:21:02 PM	Service Location	Detail Complete	
Juir 5 1, 2022, 122 102 111		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		х
All Rows	Number Of Successful	Number Of Errors
3	3	0
		CANCEL

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

Knowledgebase

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 refrigerant levels be checked to ensure that the system provides proper		

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 Addressbook File remove bad data then reimport back again.