

Import Job Tasks

Pre-Conditions:

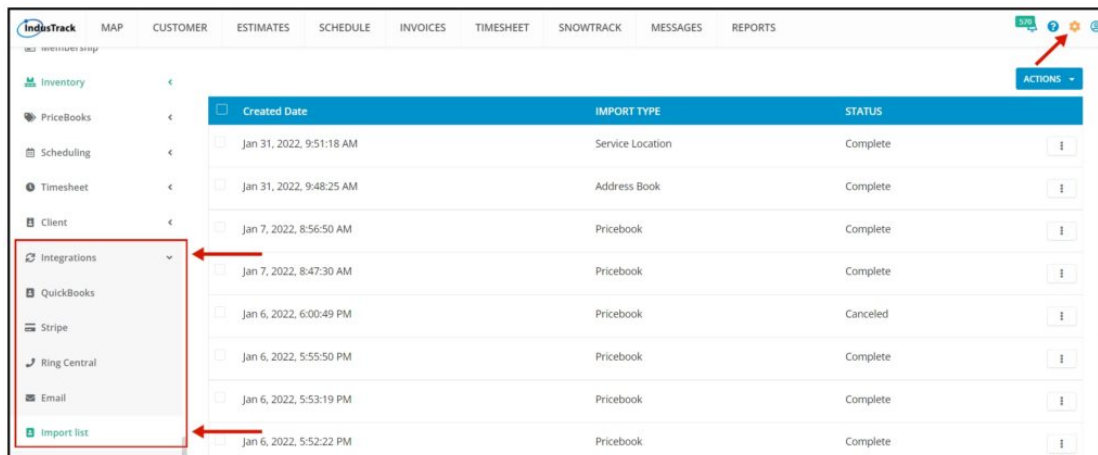
- **Customer Addressbook** and **Jobs** have been imported successfully.
- Use the **Jobs Tasks** template with the columns in the table below. We need the **Customer ID** and **Job ID** from the previous import. For the current import, we need the Job Task ID and Description.
- Note that Job Tasks ID 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

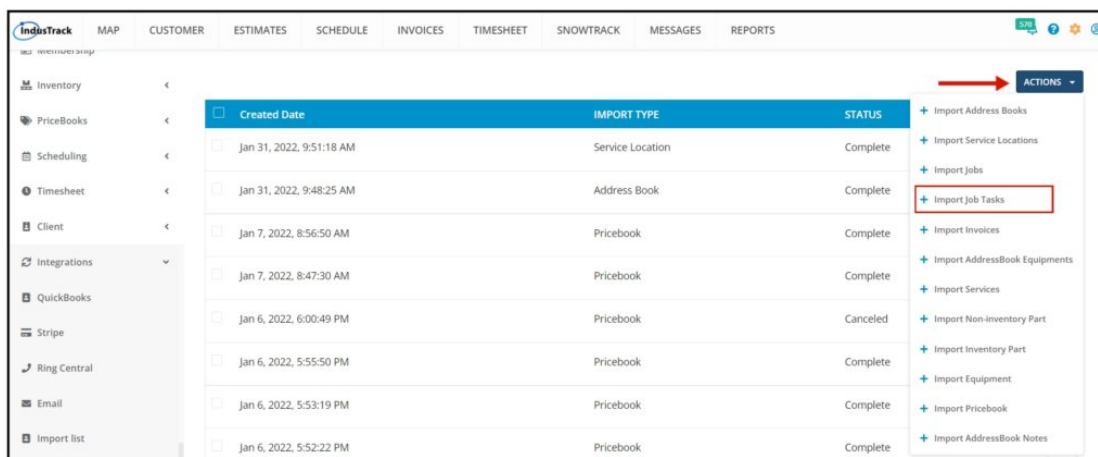
JOB ID*	JOB TASK ID*	CUSTOMER ID*	DESCRIPTION
----------------	---------------------	---------------------	--------------------

How to import Job Tasks

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**.



2. An Import Job Task 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.

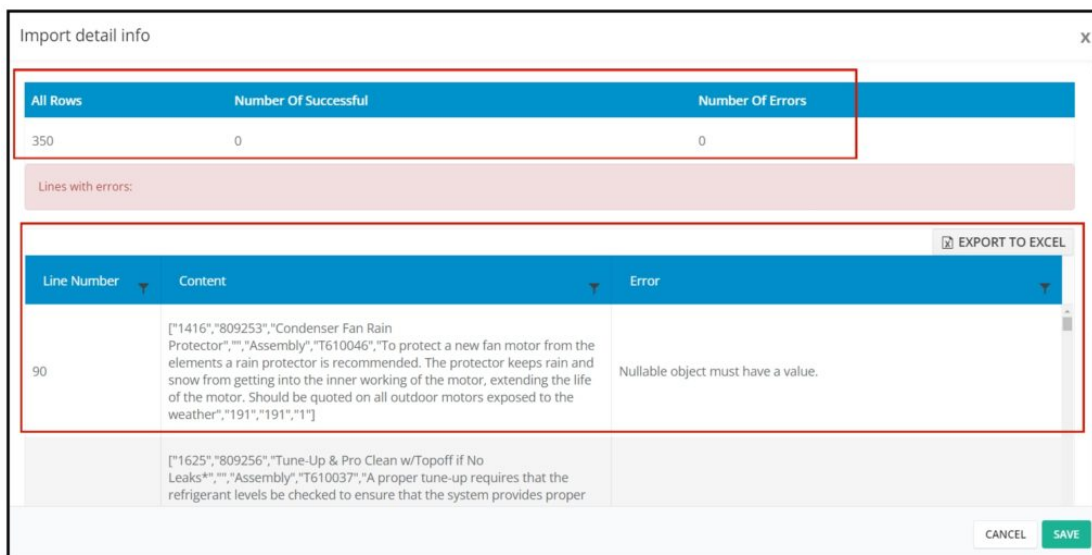
Created Date	IMPORT TYPE	STATUS	ACTIONS
<input type="checkbox"/> Feb 1, 2022, 4:18:56 PM	Job Task	Complete	⋮
<input type="checkbox"/> Jan 31, 2022, 12:21:02 PM	Service Location	Complete	Detail Cancel

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.

All Rows	Number Of Successful	Number Of Errors
3	3	0

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

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.



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.