

Import Jobs

Pre-Conditions:

- **Customer Addressbook** and **Service Location** have been imported successfully.
- Use the **Jobs** template with the columns in the table below. We need the **Customer ID and Service Location ID** from the previous import. For the current import, we need the Job ID and Description.
- Note that Job ID must be filled out. If they don't have Job ID information, they have to generate their own IDs.
- If Job ID is not needed from their end or if Job Tasks, Invoice, and Addressbook Equipment is not linked to a Job for future import, then leave it blank.
- 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, Start, and End Time columns. 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.

Job Import Template

Note that columns with (asterisk) * are required.

Job ID*	Customer ID*	Service Location ID*	Description	Start Time	End Time
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1. Go to Settings > Integrations > Import List > ACTIONS > **Import Jobs**.

The screenshot shows the Industrack web application interface. The top navigation bar includes 'MAP', 'CUSTOMER', 'ESTIMATES', 'SCHEDULE', 'INVOICES', 'TIMESHEET', 'SNOWTRACK', 'MESSAGES', and 'REPORTS'. On the left, a sidebar menu is expanded to 'Integrations', with 'Import list' highlighted. The main content area displays a table with columns: 'Created Date', 'IMPORT TYPE', and 'STATUS'. The table contains several rows of import records. In the top right corner, an 'ACTIONS' dropdown menu is visible, with a red arrow pointing to it.

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

This screenshot shows the same Industrack interface as the previous one, but with the 'ACTIONS' dropdown menu open. The 'Import Jobs' option is highlighted with a red box. Other options in the dropdown include 'Import Address Books', 'Import Service Locations', 'Import Job Tasks', 'Import Invoices', 'Import AddressBook Equipments', 'Import Services', 'Import Non-inventory Part', 'Import Inventory Part', 'Import Equipment', 'Import Pricebook', and 'Import AddressBook Notes'. A red arrow points to the 'ACTIONS' dropdown in the top right corner.

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

Import Jobs

Timezone *

Select a File to upload

UPLOAD

CANCEL SAVE

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

Import Jobs

Select a File to upload

UPLOAD

Job ID	Customer ID	Service Location ID	Description	Start Time	End Time
Job ID*	Customer ID*	Service Location ID*	Description	Start Time	End Time

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	ACTIONS
Jan 28, 2022, 2:04:19 PM	Job	Complete	⋮
Jan 28, 2022, 10:43:18 AM	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> 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.

The screenshot shows a dialog box titled "Import detail info" with a close button (X) in the top right corner. It contains two main sections:

- Summary Table:** A table with three columns: "All Rows", "Number Of Successful", and "Number Of Errors". The first row shows values 350, 0, and 0 respectively.
- Lines with errors:** A section with a red header bar and a table below it. The table has three columns: "Line Number", "Content", and "Error".
 - Line 90: Content is "[\"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\"]". The error is "Nullable object must have a value."
 - Line 1625: Content is "[\"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".

At the bottom right of the dialog, there are "EXPORT TO EXCEL", "CANCEL", and "SAVE" buttons.

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.