

Import Services

Pre-Conditions:

- Use the **Services** template with the columns in the table below. We need the **Name** of the services to be imported from the customer.
- 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 provided.
- Make sure to delete the column names before you import them into Industrack. Otherwise, it will cause issues during the import.

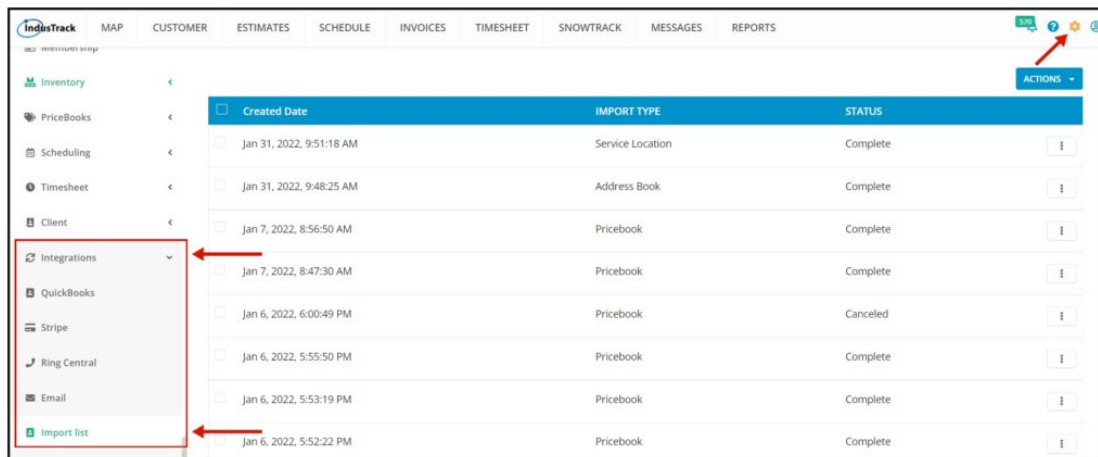
SERVICES IMPORT TEMPLATE

Note that columns with (asterisk) * are required.

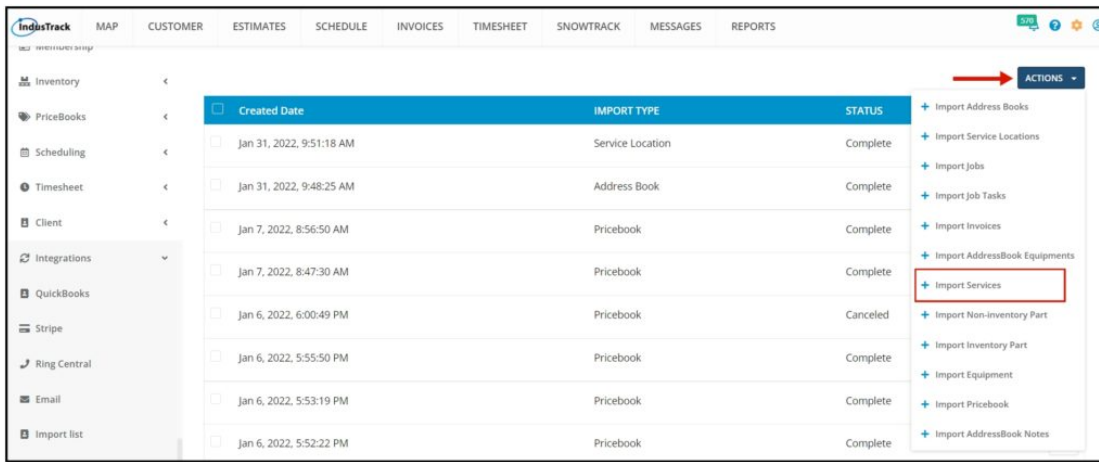
Name*	SKU	Sales description	Sale Price	Cost
Blueprint Changes	5621	for edit/change	899	600
Carpet Installation	3362	g typically consist	120.87	87.5

How to Import Services

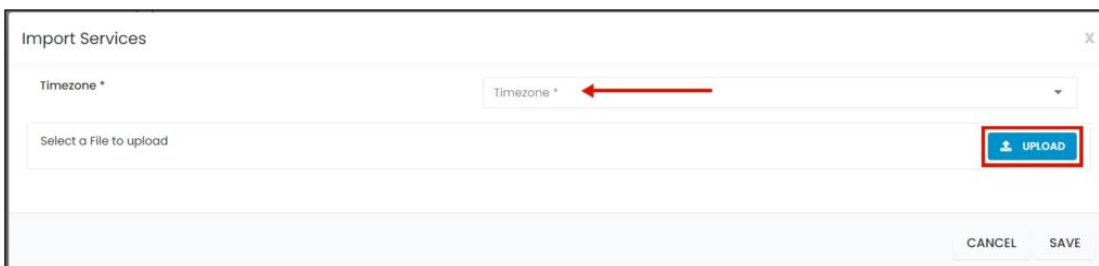
1. Go to Settings > Integrations > Import List > ACTIONS > **Import Services**.



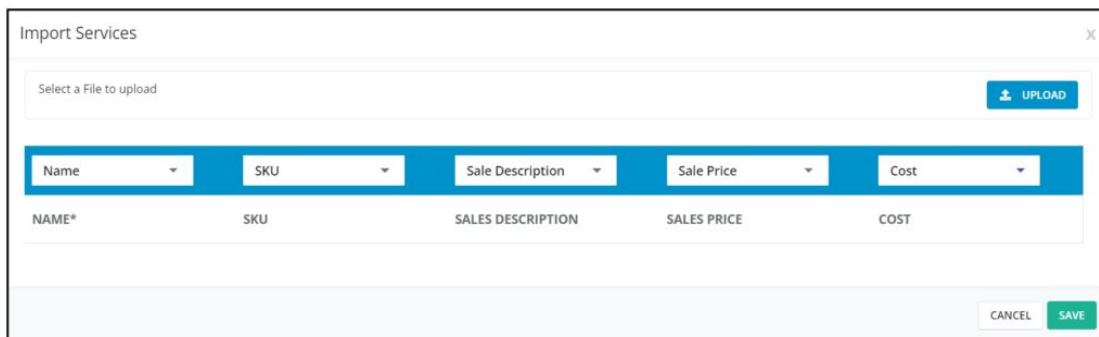
On the Import List Page click on Actions, and on the drop-down select **Import Service**.



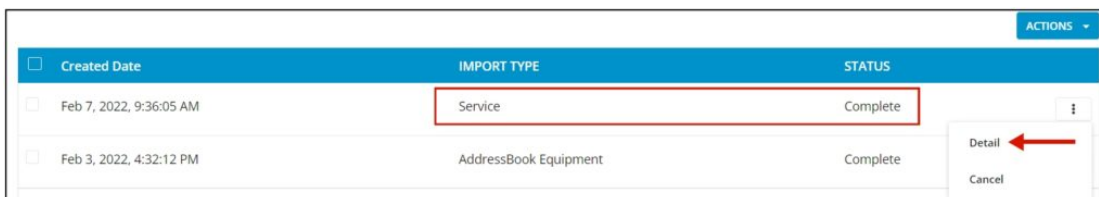
2. An Import Services window will pop up. Select your Timezone, Click Upload and select the correct Excel file to be imported.



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.**



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

CANCEL SAVE

6. If all Rows were successfully imported, do a spot check in settings> inventory> inventory list 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 Services File remove bad data then reimport back again.