

Invoice Awaiting Approval Switch Import

Overview

This import is used to switch the invoice approval status between *Pending* to *Awaiting Approval* for service providers with the account power *Invoice Approval Status - Awaiting Approval*.

Business Rules

The following business rules apply when using this tool:

- User require the *Allow Invoice Awaiting Approval* power
- The invoice belongs to the caller of the bulk import
- The invoice approval status must be in the *Pending* or *Awaiting Approval* status

Licensing

This feature is available to subscribers of the following:

- ☐ Emersion Core
- ☐ Optional Modules
- ☒ Upon Request (please contact your Account Manager)

Import Result Notification

This feature utilises the **Bulk upload processing notification event** (event type 963) to send a notification to the user containing the results of the import attempt.

- If the import is successful, the email notification will advise you when the import process is complete.
- If the import is not successful, the email notification will send details of the records that failed validation and why.

An event template must be created and the event must be *enabled* before the import tool can be used.

Preparing Data for Import

To prepare your data for import, you will need to create a CSV import file or you can download the import file below. You will need to extract the csv file and save it.

A hard limit of 20000 rows is supported via this tool, including the header row.

If you need to import more than this, create multiple import files and process them one-by-one.

[Download the invoice awaiting approval import template](#)

Importing The Data

To access the import tool:

Admin > Bulk Import > Invoice Awaiting Approval Switch

1. Click the **Browse** button and select the csv file containing the data you want to import.
2. If you want the bulk upload processing notification email to be sent to a different email address than the address defined in the event template, tick the **Override?** checkbox and enter an alternative email address. This will only apply for this upload. To change the email address for all future imports, you will need to change the recipient defined in the event template.
3. Press **Submit**
4. The system will validate the data and if no errors are found, the system will import the data. When the notification email is received, the process has been completed.

Validating the Import



Bulk Import Validation

The system will parse the data for invalid formatting only. It cannot check for data accuracy. It is strongly recommended that you check the imported data to ensure that the data was accurately imported. To do this, divide your import records into groups of 20. Check a single record in each group. If an error is found, check each previous record for the group until you find the one that was imported incorrectly.

If you find an problem, you cannot roll back the import. You have two options should this occur:

1. Manually correct the data.
2. Request Emersion fix the errors for you.

Any request to correct imported data must be [submitted via a QR ticket](#). Emersion will provide an estimate of the work and a quote. Quote must be approved *in writing* before any work commences.

Data Definition

This section contains a list of the required fields and a definition of what the system considers as valid inputs.

Data field	Description	Mandatory?
INVOICE_ID	The invoice ID	Yes
INVOICE_APPROVAL_STATUS	The invoice approval status <i>Pending</i> or <i>Awaiting_Approval</i> . The status is not case sensitive, but the underscore in <i>Awaiting_Approval</i> must be included.	Yes

Viewing Imported Data

After importing data it is important to validate it was imported correctly. Choosing a random records and performing a visual check in Cumulus should reveal any mistakes relatively quickly that would be harder to see in an import sheet.

Invoices can be found via **Customer > Invoices or Collective Invoices**

Access Control

The following powers are used to govern access to this tool

- Invoice Approval Status - Awaiting Approval

Related Pages

- [Contact Importer](#)
- [Access Fee Override Import](#)
- [Account Status Import](#)
- [Emersion Payment Import](#)
- [Bulk Import Payment ABA File](#)
- [Package Migrations Import](#)
- [Service Import](#)
- [Add Accounts To Account Group](#)
- [Virtual Bank Account Import](#)
- [Bulk Invoice Approval](#)
- [Service Identifier Import](#)
- [Cardline Management Import](#)
- [Rates and Rate Override Import](#)
- [Product Rate Override Import](#)
- [Product Purchases Import](#)