Product Invoice Mapping Import

Overview

This import tool provides a way of importing product overrdies for the product invoice mapping feature.

Business Rules

The following business rules apply when using this tool.

- The product invoice map must exist.
- product invoice map should be owned by the service provider.
- Product ID must exist.
- Product should be available to the logged in provider.
- Product must have a service type category.
- The product's service type category must match the product invoice map's service type category id
- Product should not be already overridden against the same product invoice map.
- Overridden names are limited to the defined field lengths.
- At least one overridden name must exist in the record (either product, category or subcategory)

Licensing

This feature is available to subscribers of the following:

- [ ] Emersion Core
- [x] Optional Modules : product invoice mapping
- [ ] 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 2000 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 Download the product invoice map import template import template

Importing The Data

To access the import tool:

Admin > Bulk Import >product invoice map Products

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.

To complete your data import file, you will need access to some reference data.

- For the product_id field, Go to **Report > List > Reference** and download the report **Product List By Service Type Category with Product Keys (#1014)**

Data field	Description	Mandatory?
product_invoice_map_id	Product invoice map ID.	Yes
product_id	Emersion product ID.	Yes
overridden_product_name	The new product name to be presented on the invoice replacing the default product name (max 100 characters).	No
overridden_category_name	The new product category to be presented on the invoice (max 40 characters).	No
overridden_subcategory_name	The new product subcategory. Users may insert this data, however there is no functionality within Emersion associated with this field (max 40 characters).	No

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.

product invoice maps can be found via **Packages and Plan Management > Product Invoice Map > Product Overrides** tab.

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