Rates and Rate Override Import

Overview

This import tool provides the ability for users to:

- import new rates against rate cards
- update existing rates.
- import a rate override against a service subscription.

This tool will *not* import product rate cards or product rates. For those, see the links below.

- Product Rate Card Import
- Product Rates Import
- Product Rate Override Import

Business Rules

The following business rules apply when using this tool.

All values match their respective types and where they are objects, that these objects exist.
All defined 'Child Rate At Maximum' point to a rate (if ID then exists in the database, if string exists in this file as a Vanity Rate ID) that exists and is the same type (same service subscription or rate card object)
Mark-up and Price are not defined at the same time
Mark-up OR Price is actually set If price is defined that price increment and charge increment are defined
The service type category on the tariff matches the service subscription (Service Subscription -> Service -> Service Type -> Service Type Category)
That either the service subscription ID or the rate card ID is populated
If the service subscription ID is populated, that it is owned by a child account of the calling account
If the rate card ID is populated, that it is owned by the calling account
That minimum is not greater than maximum if both are defined
If a maximum is specified that the 'maximum type' is populated also
Note is specified that it is not over 255 characters
Either the 'Rate ID' or 'Vanity Rate ID' are specified
If the 'Rate ID' is specified and so is 'Rate Card ID' that the rate is belongs to the rate card
If the 'Rate ID' is specified and so is 'Service Subscription ID' - that the rate belongs to the service subscription
If the 'Vanity Rate ID' is specified, that there isn't already a rate present for the supplied service subscription or rate card ID. Ensure that if updating a rate all fields are emptied.
For each collection of rates against a service subscription, while processing create a cache of the rates (before and after) and using the new import 'Post Processing Step' create a note against the service subscription.

The tariff name
The rate card name
Detail of what the rate was
Detail of what the rate now is
Ensure the note is owned by the user calling the import

Note the file-name used in the import.If the rates were against a rate card instead of a service subscription then the note should be bound to the rate card instead. (Notes can be bound to any object.).

Licensing

This feature is available to subscribers of the following:

- [ ] Emersion Core
- [x] 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 20,000 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 Rate Import Template

Importing The Data

To access the import tool:

Admin > Bulk Import > Rate Import

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 tariff ID field, Go to **Report > List > Reference** and download the report **Tariff List by Service Type Category** (id: 870)
- Rate Profile IDs - Download this document to get the rate profile names and IDs.
- Maximum Value Type - Download this document to get a list of maximum value types and IDs.

Data field	Description	Mandatory?
Tariff ID	The ID of the tariff	Yes
Service Subscription ID	The ID of the service subscription.	No Yes, when importing a rate override.
Rate Card ID	The ID of the rate card that will be updated.	No Yes, when creating or updating rate within a rate card. **Rate ID** becomes mandatory
Rate ID	The ID of the rate that will be updated. This can be found in your rate card	No If adding a new override and there is a service sub id Yes, when updating an **existing** rate in a rate card. **Rate Card ID** becomes mandatory **Vanity Rate ID musty be blank**

Vanity Rate ID	String. This is used in parsing brand new rates	No Yes if your rate is brand new. **Rate ID must be blank.** A unique reference ID for each new rate you're **creating as new (either in a rate card or as an override**) Eg. R1 R2 R3 etc etc
Child Rate at maximum	String. This is used in parsing the data to assist in mapping child rates	No
Rate Time Band ID	Integer. The ID of the time band that will be applied.	No
In Cap	1 (true) or 0 (false). Flag whether the rate is a part of an included value.	No
Included Value Slot Type ID	Whether the rate is part of an included value. Enter the slot id Enter 1 for slot1 Enter 2 for slot2 Enter 3 for slot3 Enter 4 for slot4	No Yes if In Cap is set to 1 (true)
Rate Order	Orders rates in the user interface when multiple children exist. Default = 1.	No
Rate Profile ID	Integer. The ID of the rate profile that will be used to calculate the charge. Download this document to get the rate profile names and IDs.	Yes
Markup	Integer. The amount (in percentage) to markup the price.	No Yes if the rate profile ID is set to passthrough, which you'll need to set this column to 0.
Flagfall	Decimal (positive only). The amount charged for each call implicitly	No
Initial Free	Integer. The amount of sec/kb given at the start of a call	No
Price	Decimal The price to charge	No
Price Increment	Integer. The way the price is represented in seconds. For instance, $4 per minute	No
Charge Increment	Integer. The way calls are blocked for charging (in seconds). For instance, $4 per minute charged in 30 second blocks.	No
Minimum Price	Decimal. The minimum charge for the call/event.	No
Maximum Value	Decimal. The minimum charge for the call/event.	No
Maximum Value Type	Integer (ID) or string (MAX_NAME). Download this document to get a list of maximum value types and IDs.	No
Notes	String. This is a vanity description for the rate itself	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.

Rates can be found via **Packages and Plans > Management > Rate Cards > Rate Card Details > Rates**

Access Control

The following powers are used to govern access to this tool

- Bulk Import - Rates

Related Pages

- Subscription Rate Overrides
- Subscription Rate Override Fundamentals
- Create a Flat Rate Plan for a Telephony Service
- Apply a Subscription Rate Override
- Rates and Rate Override Import
- Product Rate and Default Mark-ups
- Rate Card Fundamentals
- Rate Profiles
- Plan Building and Plan Management
- Training Session Guide: Packages and Plans
- Plan Statuses and Approval Settings
- The Emersion Billing Objects
- Plan Object Linking
- Time Tables