

Contract Import

Overview

This feature provides an easy and fast way to import contracts against a package subscription. It also supports modifying the end date and the contract type.

Licencing

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 The 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 contract management import template](#)

Importing The Data

To access the import tool:

Admin > Bulk Import > Contract Management 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 import 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 ticket. Emersion will provide an estimate of the work and a quote. The quote must be approved and paid in advance before any restorative 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?
PACKAGE_SUBSCRIPTION_ID	The ID of the package subscription who's contract will be created or updated.	Yes

CONTRACT_TYPE_ID	The ID of the contract type that will go against the package subscription. Note that if you are updating an existing contract, this field should be left empty. It is not permitted to modify contract types on active contracts. If a change in contract type is required, the current contract should ended and a new contract created.	No
START_DATE	The start date of the contract. The format is YYYY-MM-DD. By default, the contract will commence from the date of import.	No
END_DATE	The end date of the contract. The format is YYYY-MM-DD. If no date is supplied, the contract will run for the life of the subscription.	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.

The information regarding a contract for a package subscription can be found under the **Package Subscription > Contract Configuration** tab.

You can find the Package Subscription tab under a customer, or by searching for the package subscription directly from the **Services > List All** search screen.

Access Control

The following powers are used to govern access to this tool

- Bulk import - Contract Management