# **Import**

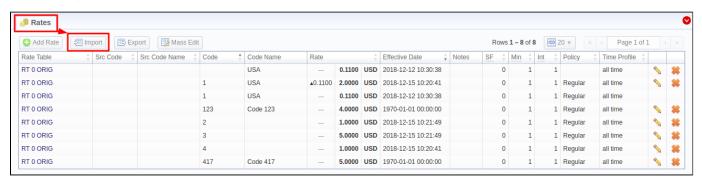
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## Import Tab

The tab is designed to provide a user with a possibility to import rates to JeraSoft Billing by uploading a .csv or .xls file. The whole process can be divided into several steps discussed below. You can access the rates import by clicking the Import button in the Rates section. The button will only be active when you filter the rates by the rate table:

Screenshot: Import button



# Step 1. Selecting a File and Specifying Additional Parameters

The first thing you need to do in the import configurations view is to select a rate table (the import template will autocomplete if existent). Then, drag-and-drop or upload an import file. Additionally, you can specify the following parameters:

Screenshot: Step 1. File Settings



Field	Description
Rate Table	This field will be autocompleted with the name of a rate table if the rates are filtered in the Rates section. If not applicable, select a target rate table
Import Template	Select a target template for rates importing if available

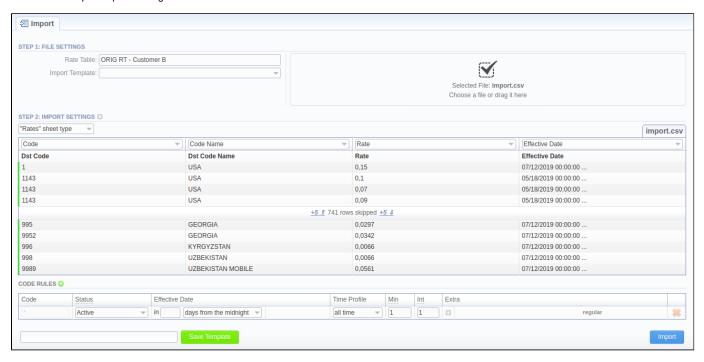


- 1. It's not possible to import a file into the Rate Table with the Min Time and Interval = 0. These fields must have at least 1 second.
- 2. While specifying the Effective Date and End Date, keep in mind that Timezone is UTC (+0000) by default.

#### Step 2. Import Settings

The system will recognize the file and display first and last 5 rows of the first sheet. You will need to select the start and end lines of an import table (marked green). The middle lines are skipped, you can unfold them both ways by five lines by clicking the respective buttons. To switch from one sheet with rates to another, click on a respective tab: i.e., **Sheet 1**, **Sheet 2**, etc.

Screenshot: Step 2. Import Settings



Starting from VCS 3.17.0, the user has a possibility to specify a type for each sheet of an imported file. Each sheet type has its own list of columns. Currently, there are 3 sheet types:

- Rates type an equivalent to an importing page from earlier versions. While importing, at least 1 sheet must be of Rates type. For this type, the
  following columns are mandatory:
  - 1. Dst Code/Code Name indicate at least one of them
  - 2. Rate
  - 3. Effective Date if you don't indicate this column, the Effective Date, specified in the Code Rules information block, will be applied to imported rates.
- Src Codes type this type allows a user to perform the import to the code deck attached to the rate table. For this, indicate source codes/code names in the two columns: Src Code and Src Code Name. If selected, both columns must be specified.
- Codes type this type allows a user to perform the import to the code deck attached to the rate table. For this, indicate destination codes/code
  names in the two columns: Code and Code Name. If selected, both columns must be specified.

Starting from **JeraSoft Billing v3.18.0**, the user has an option to select the **Skip this sheet** option for the system to ignore respective sheet during import. More about sheet types configuration here.

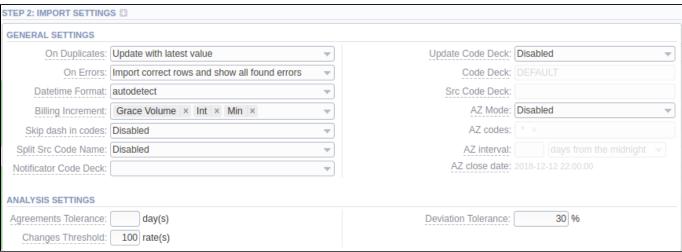
Screenshot: Sheet types

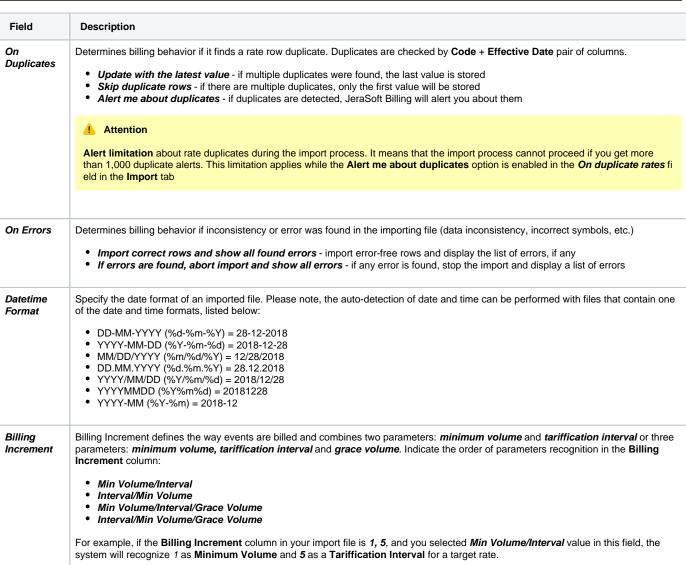


On the second step, you can also save the importing rate table as a template for further usage during import. To do so, specify a template title in the bottom left corner of the tab, and click the **Save Template** button (see screenshot above).

To open advanced configurations, click on a grey downwards arrow icon next to **Step 2: Import Settings**. Advanced settings contain the following fields:

Screenshot: Advanced settings





Skip dash in codes	Select whether a dash in codes must be skipped or not:
	<ul> <li>Enabled - codes, written as 1201-1205, will be imported as a single 12011205 code</li> <li>Disabled - 1201-1205 codes will be imported as separate 1201, 1202, 1203, 1204, 1205 codes</li> </ul>
Split Src Code Name	This option is used only in case source code names contain an <i>underscore</i> symbol. Choose one of the following:  • <i>Disabled</i> - if an Src Code Name is, for instance, <b>USA_Columbia</b> , it will be preserved as it is after import.  • <i>By underscore</i> - if selected, a <b>USA_Columbia</b> Code Name will be changed to <b>Columbia</b> after import.
Notificator Code Deck	Specify code decks that will be used for the next rates notification
Update Code Deck	Select the way you want both Src and Dst code decks to be updated with new/existing code names from current rates file:  • Disabled - leave selected code decks unchanged  • Import only not existing codes - code decks will be updated with codes and their names if they are missing  • Import all codes (update existing) - ode decks and codes will be updated with code names taken from a file, overwriting of existing ones  • Import all codes (purge code deck first) - code decks are fully cleared and then all codes and code names are imported from a file
	Attention
	If Src Code and/or Dst Code sheet type is selected, you need to enable this feature
Code Deck	Dst Code Deck that will be used for an <i>Update Code Deck</i> option. Select a destination code deck that you want to update with the above-mentioned settings (note that code deck specified settings here will only be available if you are importing a file, which contains <i>Code Names</i> in addition to <i>Codes</i> ).
Src Code Deck	Src Code Deck that will be used for an <b>Update Code Deck</b> option. Select a source code deck that you want to update with the above-mentioned settings (note that code deck specified settings here will only be available if you are importing a file, which contains <b>Code Names</b> in addition to <b>Codes</b> ).
AZ Mode	A special mode that determines system behavior regarding active/future rates:
	<ul> <li>Disabled - leave active/future rates unchanged. Selected by default.</li> <li>Simple mode - active rates from a current Rate Table will be closed on the specified AZ close date if they aren't present in this import.</li> <li>Extended mode - all existing future rates will be marked as stashed. Currently, active rates (not presented in this import) will be closed by the date specified below.</li> </ul>
AZ codes	Available if AZ Mode is active. Specify the exact code(s) AZ Mode is going to be applied to. By default, the field value is "*" (all codes)
AZ interval	Available if AZ Mode is active. Specify the period for AZ mode to close rates. The selectable options are:  • days from last midnight - the rates will be closed after the specified amount of days from the midnight of the import day  • days from now - the rates will be closed after the specified amount of days from the import day  • hours from XX:00 - the rates will be closed after the specified amount of hours from the start of an hour of the import timestamp  • hours from now - the rates will be closed after the specified amount of hours from the import timestamp
	<b>⊘</b> Tip
	For a detailed explanation, check out our Knowledge Base article
AZ close date	Available if AZ Mode is active. The field displays the time and date of rates closure based on the AZ interval parameters.
Agreements Tolerance, (days)	Define a number of days that the system will take into account while analyzing the new import and the current agreement with the vendor. If the dates of an agreement and the import are closer then the specified amount, the system will generate an alert for the manager.
Changes Threshold, (rates)	Define a number of changed rates that will serve as a threshold for the selected rate table. If exceeded, the system will generate an alert for the manager.



#### Attention

If you have rates with missing Rate value in the importing file, the system will find the previous rate for the same destination and take this value from there. Also, when you have rates with missing Effective Date value, the system will take it from the End Date value.

#### **Code Rules Information Block**

For adding a new code rule, click on the plus icon next to the information block name.

When you add a rule and set the value in the fields, it will overwrite parameters specified in the respective columns of the file. If you leave fields empty, it will take the parameters from the file.

If you add a rule with a \* code for a certain service, not specified columns of the imported rates will be filled in with the respective field values of this code rule. You can add rules with a \* code for all services. The list of code rules fields is as follows:

Screenshot: Rates import - Code Rules settings



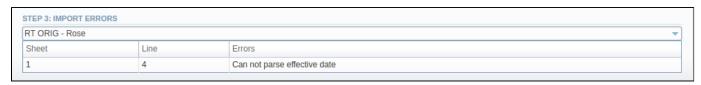
Field	Description	
Code	Indicate a destination code. For all codes, use * (asterisk)	
Status	Indicate a status for the rates. By default, it will be Active. Set the Stashed status if you want to double-check them later after important and indicate a status for the rates.	
Effective Date	Specify a start date of a rate. There are various options to schedule this date:  • days from last midnight - the rates will be active after the specified amount of days from the midnight of the import day  • days from now - the rates will be active after the specified amount of days from the import day  • hours from XX:00 - the rates will be active after the specified amount of hours from the start of an hour of the import timestamp  • hours from now - the rates will be active after the specified amount of hours from the import timestamp	
Time Profile	Indicate time profile that will be used for a current rate, for example, business time, non-business time, weekends, etc.	
Min	Minimal time of the call that will be tariffed. For example, if the total call time was 20 seconds and <i>Min</i> is 30, the client will pay for 30 seconds of the call.	
Int	Tariffication interval. This parameter is used, when <i>Min Time</i> time expires.	
Extra	<ul> <li>Additional parameters are stored under the downwards arrow  icon.</li> <li>Tag - specify a tag for respective rates. If it's not applicable, assign a (@) tag as default.</li> <li>Service - specify a service of the rates.</li> <li>Grace Volume - a volume that will not be tariffed (i.e., it's free).</li> <li>Policy - rate's type for a code: regular rate or additive (extra) rate.</li> <li>Setup Fee - an initial fee that is charged.</li> <li>Number Length - specify the min and max number length.</li> <li>End Date - the final date after which the rate will expire.</li> <li>Notes - additional information.</li> </ul>	

After specifying all additional parameters, click the Import button.

#### Step 3. Import Errors

Provided a non-critical error(s) occurred, you will see a table, where exact sheet, line and error description are specified (see screenshot). In this case, you need to start the whole import procedure from the beginning.

Screenshot: Step 3. Import Errors



In case numerous errors occurred while importing rates, you will be displayed the respective notification:

Screenshot: Error notification



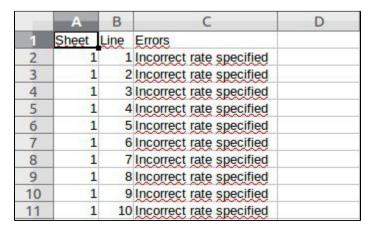
Too many errors. Please download file to see detailed data.

### Download file

By clicking on **Download file**, a .csv file with the following columns will be downloaded:

Column	Description
Sheet	Index number of the sheet, where an error occurred
Line	Line of the sheet, where an error occurred
Errors	Description of the error that occurred

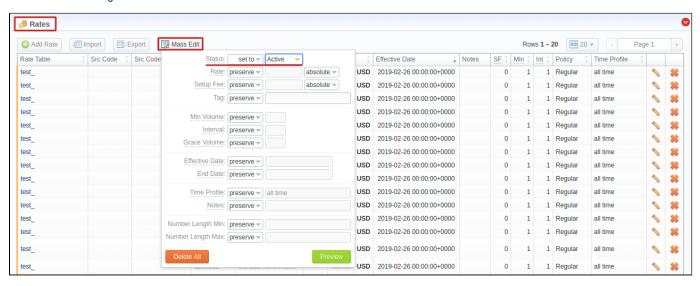
Screenshot: .csv file with detailed error data



# **Confirming Rates**

When the procedure has been executed, you will be forwarded to the Rates section where all imported rates will be displayed. If the Auto-Confirm option was disabled during the import process, you need to Mass Edit the rates' status from stashed to active.

Screenshot: Confirming Rates



The tab contains information about all executed imports to this rate table. You can access it in the Rate Tables {Specific Rate Table} Import History. It is presented in the form of a table with the following columns:

Screenshot: Import History output



Column	Description
Date	Time and date of import execution
User Login	Login of a user who executed the import
File	Import file. By clicking on the icon, the file will be downloaded
Total	Total amount of imported rates
New	Total amount of rates with New type
Increased	Total amount of rates with Increased type
Decreased	Total amount of rates with Decreased type
Unchanged	Total amount of rates with Unchanged type
A-Z Closed	Number of rates, closed by A-Z import
A-Z Stashed	Number of rates, stashed by A-Z import
Status	Status of import procedure (success/failed)
Error File	File that contains a description of all errors occurred during import. By clicking on the icon, the file will be downloaded
icon	When clicked on, deletes respective import data from the system

The imported rates are divided into the following types: Unchanged, Increased, Decreased, New. By clicking on the respective numbers of rates, you can see filtered rates by type (see screenshot above) in the *Rates* section.



Attention

Imported rates will be marked as Unchanged, Increased, or Decreased only if their Effective Date value (e.g., 04.25.2018) is higher than Effective Date of a current rate (e.g., 04.10.2018) and they don't have an End Date value. If the End Date value is present in a previous rate, the fresh one will be marked as New.