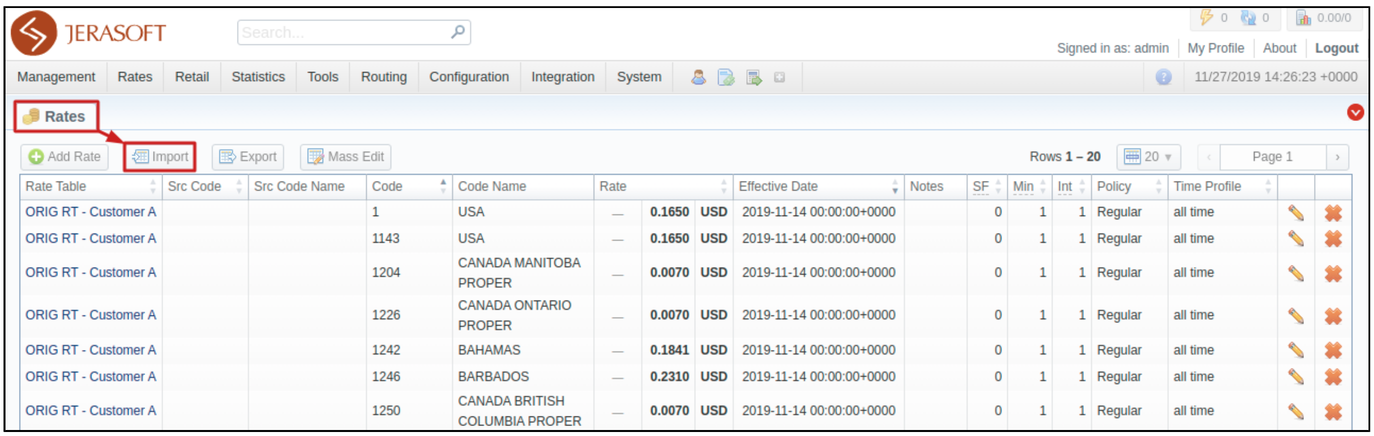
Import

In this article

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:

Screenshot: Import button



Note

The button will only be active when you filter the rates by the rate table.

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

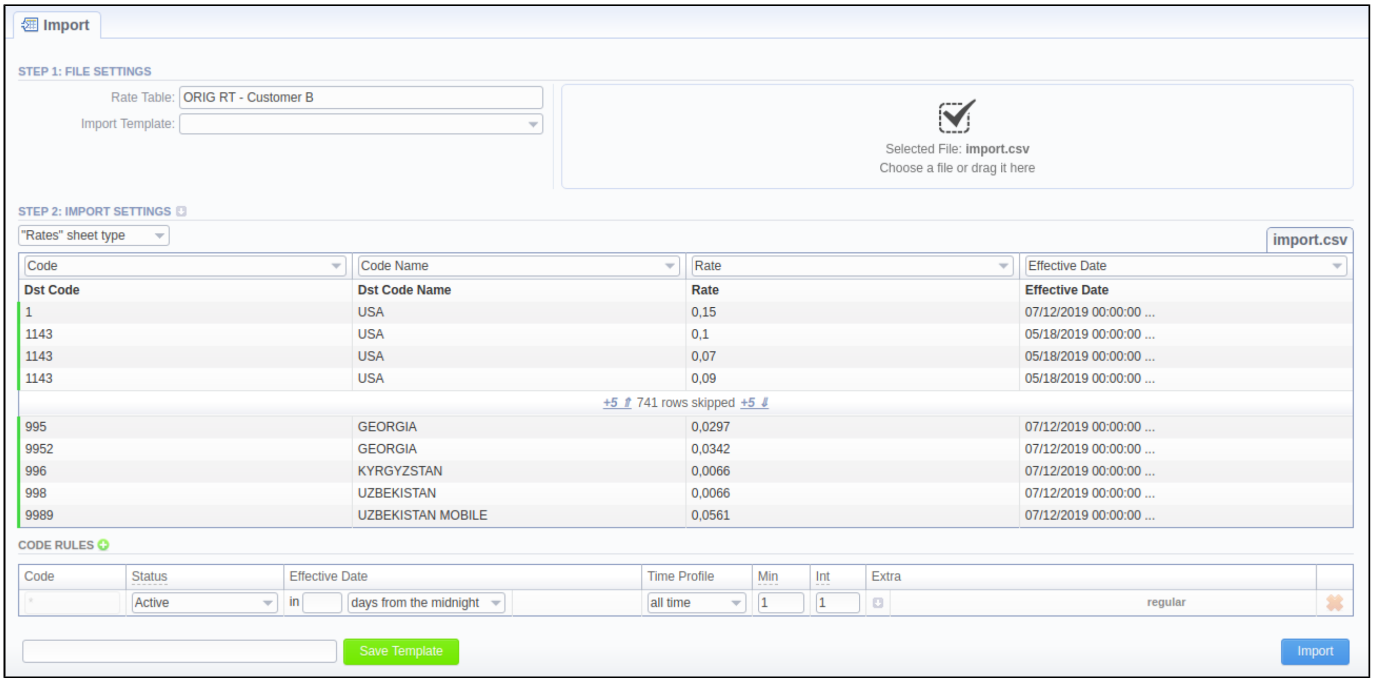
Warning

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.
3. Please **DO NOT** import duplicates of the same ***Code*** in one import file.

Step 2. Import Settings

The system will recognize the file and display the 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

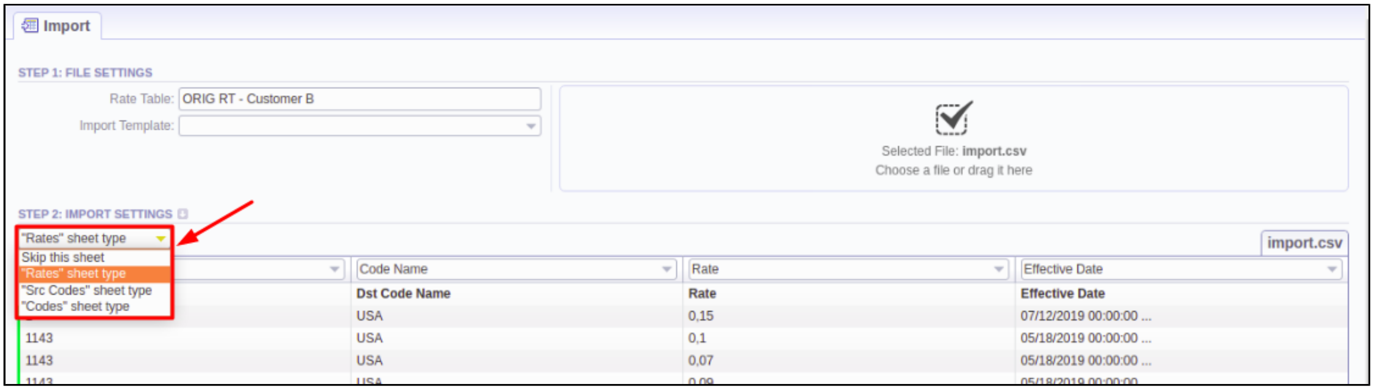


Starting from **VCS 3.17.0**, the user has a possibility to specify a type for each sheet of an imported file. Each sheet type has its own list of columns. Currentl y, there are 3 sheet types:

- **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 the respective sheet during import. More about sheet types configuration here.

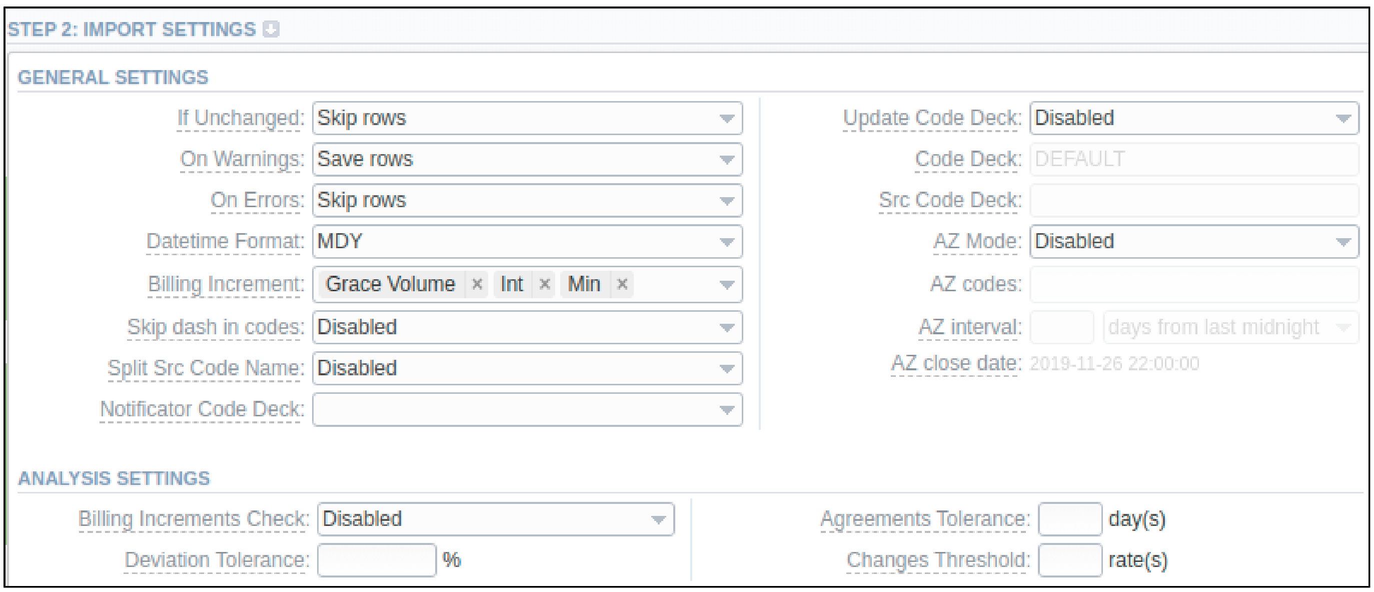
Screenshot: Sheet types



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



Field	Description
If Unchanged	Determines system behavior if it detects rates in the imported file with all the same settings as the ones already present in the Rate Table but ***Effective Date***. Has two options: • ***Save rows*** • ***Skip rows***
On Warnings	Manages alerts from the ***Analysis Settings*** section. If any, you'll have the option to: • ***Save rows*** • ***Skip rows*** • ***Abort import***
On Errors	Determines billing behavior if inconsistency or error was found in the importing file (data inconsistency, incorrect symbols, etc.) • ***Import correct rows and show all found errors*** - import error-free rows and display the list of errors, if any • ***If errors are found, abort import and show all errors*** - if any error is found, stop the import and display a list of errors

Datetime Format	Specify the date format of an imported file. Please note, the auto-detection of date and time can be performed with files that contain one of the date and time formats, listed below: • DD-MM-YYYY (%d-%m-%Y) = 28-12-2018 • YYYY-MM-DD (%Y-%m-%d) = 2018-12-28 • MM/DD/YYYY (%m/%d/%Y) = 12/28/2018 • DD.MM.YYYY (%d.%m.%Y) = 28.12.2018 • YYYY/MM/DD (%Y/%m/%d) = 2018/12/28 • YYYYMMDD (%Y%m%d) = 20181228 • YYYY-MM (%Y-%m) = 2018-12
Billing Increment	Billing Increment defines the way events are billed and combines two parameters: ***minimum volume*** and ***tariffication interval*** or three parameters: ***minimum volume, tariffication interval*** and ***grace volume***. Indicate the order of parameters recognition in the **Billing Increment** column: • ***Min Volume/Interval*** • ***Interval/Min Volume*** • ***Min Volume/Interval/Grace Volume*** • ***Interval/Min Volume/Grace Volume*** For example, if the **Billing Increment** column in your import file is ***1, 5***, and you selected ***Min Volume/Interval*** value in this field, the system will recognize *1* as **Minimum Volume** and ***5*** as a **Tariffication Interval** for a target rate.
Skip dash in codes	Select whether a dash in codes must be skipped or not: • ***Enabled*** - codes, written as ***1201-1205***, will be imported as a single ***12011205*** code • ***Disabled*** - ***1201-1205*** codes will be imported as separate ***1201***, ***1202***, ***1203***, ***1204***, ***1205*** codes
Split Src Code Name	This option is used only in case source code names contain an ***underscore*** symbol. Choose one of the following: • ***Disabled*** - if an Src Code Name is, for instance, **USA_Columbia**, it will be preserved as it is after import. • ***By underscore*** - if selected, a **USA_Columbia** Code Name will be changed to **Columbia** 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 ***Update Code Deck*** 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 ***Code Names*** in addition to ***Codes***).
Src Code Deck	Src Code Deck that will be used for an ***Update Code Deck*** 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 ***Code Names*** in addition to ***Codes***).
AZ Mode	A special mode that determines system behavior regarding **active/future** rates: • ***Disabled*** - leave active/future rates unchanged. Selected by default. • ***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. • ***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.
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 **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.
Billing Increments Check	Select whether you need billing increments checking during import or not: ***Enabled*** - the system will raise an error in case imported rates' billing increments differ from those already present in the Rate Table. ***Disabled***
Deviation Tolerance, (%)	Define the value of how much can an imported rate differ from an existing one in percent. If exceeded, the system will generate an alert for the manager.
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 (if the previous rate was not closed).

When you have rates with missing **Effective Date** value, the system will take it from the **End Date** value.

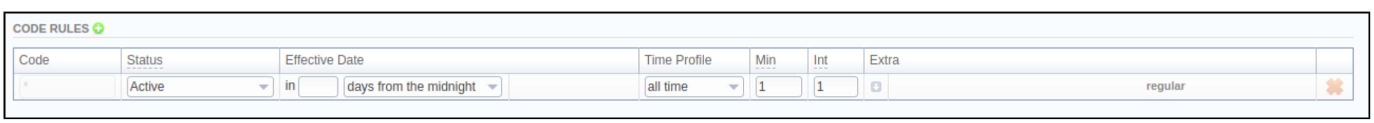
Code Rules Information Block

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 the parameters specified in the respective columns of the file. If you leave fields empty, it will take the parameters from the file.

There is one default rule with *** code** that affects all the imported codes. The not specified columns of the imported rates will be filled in with the respective field values of this code rule. 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 import.
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

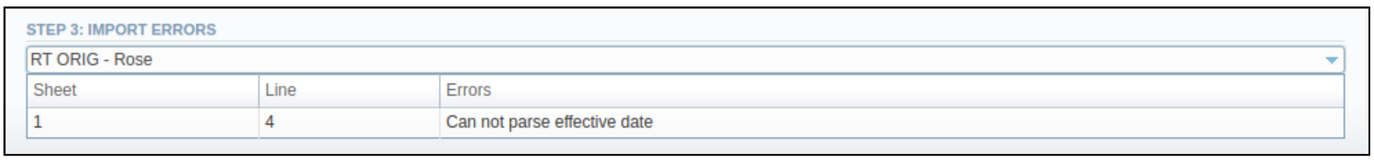
Time Profile	Indicate time profile that will be used for a current rate, for example, ***business time, non-business time, weekends***, etc.
Min	Minimal time of the call that will be tariffed. For example, if the total call time was **20** seconds and ***Min*** is **30**, the client will pay for **30** seconds of the call.
Int	Tariffication interval. This parameter is used, when ***Min Time*** time expires.
Extra	Additional parameters are stored under the downwards arrow icon. • ***Tag*** - specify a tag for respective rates. If it's not applicable, assign a (@) tag as default. • ***Service*** - specify a service of the rates. • ***Grace Volume*** - a volume that will not be tariffed (i.e., it's free). • ***Policy*** - rate's type for a code: **regular** rate or **additive** (extra) rate. • ***Setup Fee*** - an initial fee that is charged. • ***Number Length*** - specify the min and max number length. • **End Date** - the final date after which the rate will expire. • ***Notes*** - additional information.

After specifying all additional parameters, click the **Import** button.

Step 3. Import Errors

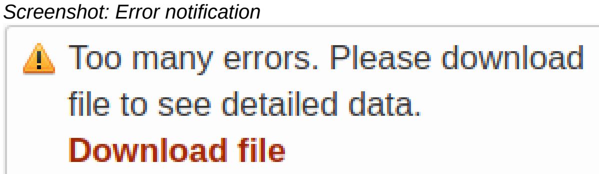
Provided a non-critical error(s) occurred, you will see a table, where the exact sheet, line and error description are specified (see screenshot). In this case, you need to start the whole import procedure from the beginning.

Screenshot: Step 3. Import Errors



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

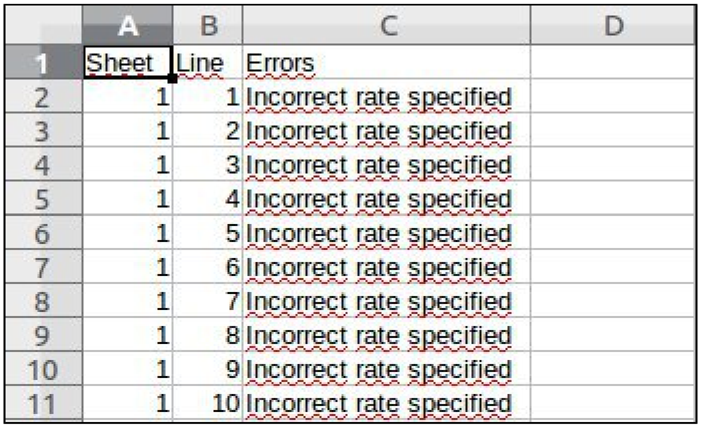
Screenshot: Error notification



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

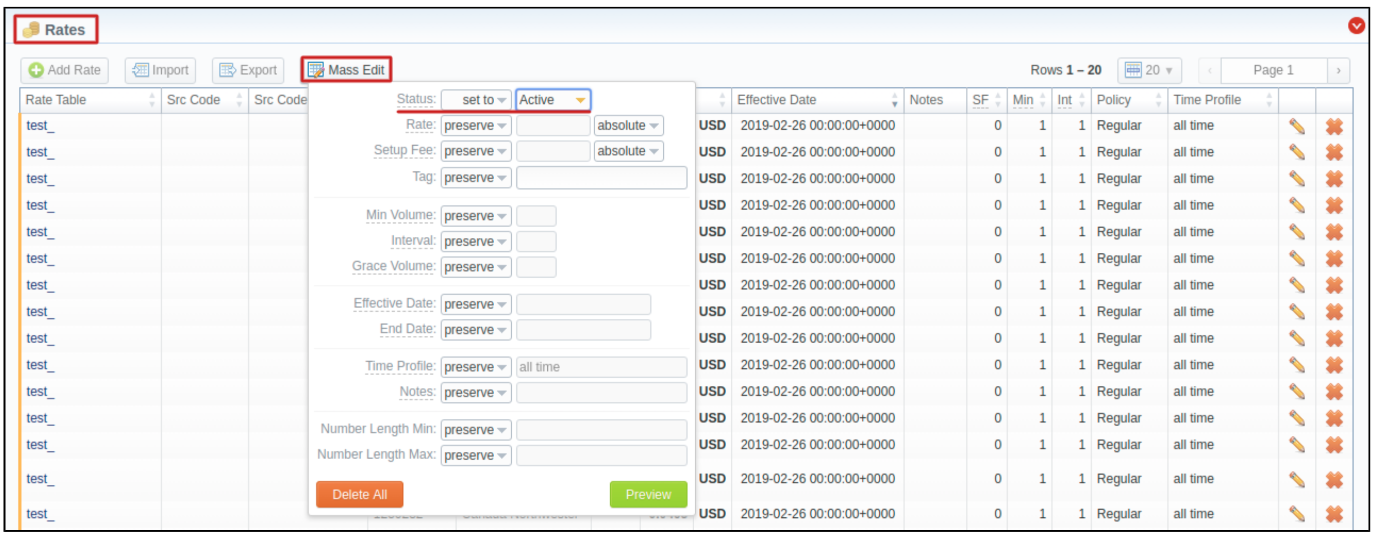


	A	B	C	D
1	Sheet	Line	Errors	
2	1	1	Incorrect rate specified	
3	1	2	Incorrect rate specified	
4	1	3	Incorrect rate specified	
5	1	4	Incorrect rate specified	
6	1	5	Incorrect rate specified	
7	1	6	Incorrect rate specified	
8	1	7	Incorrect rate specified	
9	1	8	Incorrect rate specified	
10	1	9	Incorrect rate specified	
11	1	10	Incorrect rate specified	

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***.

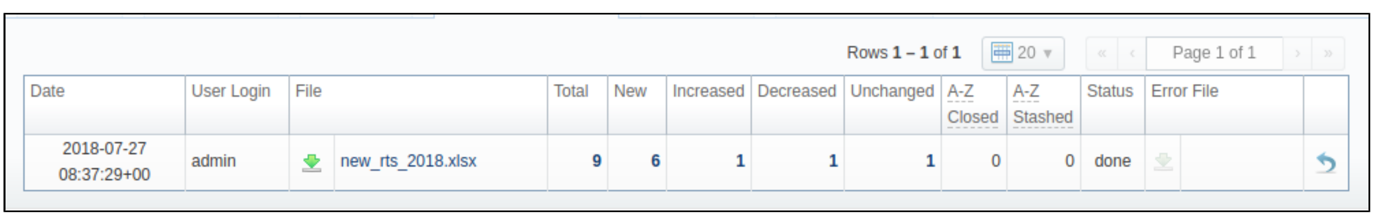
Screenshot: Confirming Rates



Import History Tab

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



Date	User Login	File	Total	New	Increased	Decreased	Unchanged	A-Z Closed	A-Z Stashed	Status	Error File
2018-07-27 08:37:29+00	admin	new_rts_2018.xlsx	9	6	1	1	1	0	0	done	

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 rows
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 that 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**.