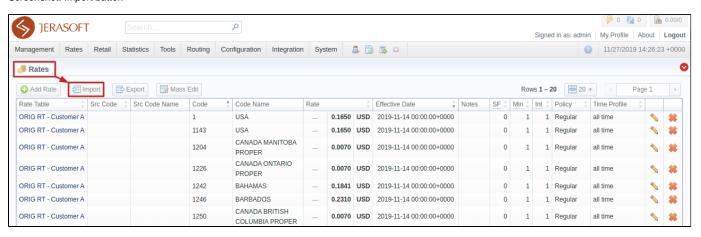
Import

In this article Import Tab Step 1. Selecting a File and Specifying Additional Parameters Step 2. Import Settings Step 3. Import Errors Confirming Rates Import History Tab

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 |

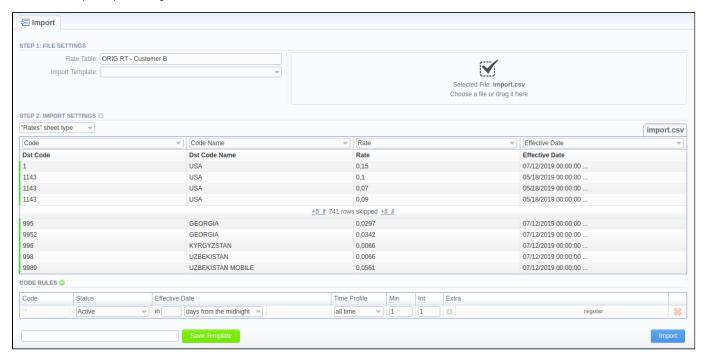


- 1. It's not possible to import a file into the Rate Table with the Min Time and Interval = 0. These fields must have at least 1 second.
- 2. While specifying the Effective Date and End Date, keep in mind that Timezone is UTC (+0000) by default.
- 3. Please **DO NOT** import duplicates of the same *Code*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



 Codes and Src Codes sheet types require the Import all codes (update existing) mode of Update Code Deck from Advanced Settings.

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.

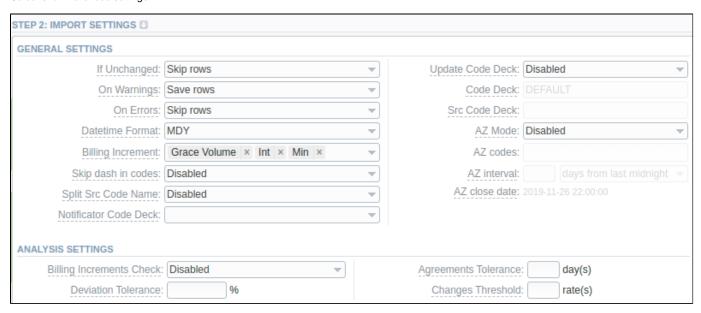
Screenshot: Sheet types



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 connext 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 <i>Effective Date</i> . Has two options: • Save rows • Skip rows |
| On Warnings | Manages alerts from the <i>Analysis Settings</i> 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 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: Format DD-MM-YYYY (%d-%m-%Y) = 28-12-2018 YYYY-MM-DD (%Y-%m-%d) = 2018-12-28 MM/DD/YYYY (%m/%d/%Y) = 12/28/2018DD.MM.YYYY (%d.%m.%Y) = 28.12.2018 YYYY/MM/DD (%Y/%m/%d) = 2018/12/28YYYYMMDD (%Y%m%d) = 20181228 YYYY-MM (%Y-%m) = 2018-12 Billing Billing Increment defines the way events are billed and combines two parameters: minimum volume and tariffication interval or three Increment 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 Select whether a dash in codes must be skipped or not: in codes 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 This option is used only in case source code names contain an *underscore* symbol. Choose one of the following: Code Name 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 Specify code decks that will be used for the next rates notification Code Deck Update Select the way you want both Src and Dst code decks to be updated with new/existing code names from current rates file: Code Deck 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 Import all codes (purge code deck first) - code decks are fully cleared and then all codes and code names are imported from a 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 Co de Names in addition to Codes). Src Code 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-Deck 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.

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 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 For a detailed explanation, check out our Knowledge Base article AZ close Available if AZ Mode is active. The field displays the time and date (with timezone) of rates closure based on the AZ interval parameters. date Select whether you need billing increments checking during import or not: Billing Increments Enabled - the system will raise an error in case imported rates' billing increments differ from those already present in the Rate Check Disabled Deviation 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. Tolerance. (%) Agreements 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 Tolerance, (days) Changes 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 Threshold, for the manager. (rates)



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 click on 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 <i>Active</i> . Set the <i>Stashed</i> 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 <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 | 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

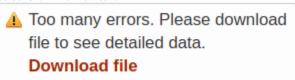
Provided a non-critical error(s) occurred, you will see a table, where the exact sheet, line and error description are specified (see screenshot). In this case, you need to start the whole import procedure from the beginning.

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 |

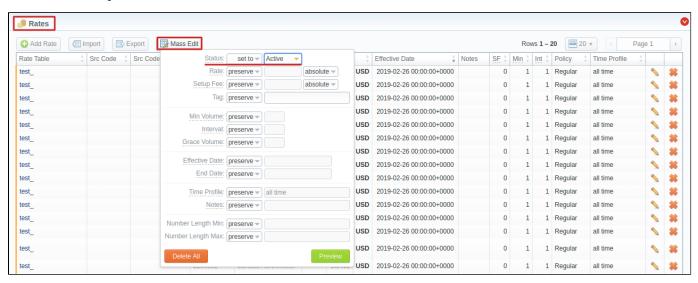
Screenshot: .csv file with detailed error data

| | A | В | С | D |
|-----|-------|------|--------------------------|---|
| 151 | 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



| 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) | |



When clicked on, deletes respective import data from the system



Only the latest Import can be undone.

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