



QUICK HELPSHEET

# Data Imports



Below is a list of common error messages received after an import failure and the steps you can take to fix it.

## The Error Message:

*Row {X}: Possible version conflict...*

## Likely Cause:

The format of the upload has changed.

## The Solution:

Download the latest version of the correct template from the Import Status page.



## The Error Message:

*Row {X}: The Account '{XXXXXXXX}' is either not found for the specified supplier's contract ({Supplier Name Here}) or the contract is marked as 'Do not include in forecasting'. Please check the input data for this row.*

## Possible Cause 01:

There are two identical active account present.

## The Solution:

Follow these instructions to check:

1. Copy the account number from the error message.
2. Navigate to 'Leads'
3. Paste the account number into 'Advanced Search' and click 'Search Leads'
  - A. If there is a result in the (default) 'Active' tab there is an active account for a lead
  - B. If there is no result - there is no active account under a lead
4. Navigate to 'Customers'
5. Paste the account number into the 'Advanced Search' field and click 'Search Customers'
  - A. If there is a result in the (default) 'Active' tab there is an active account for a customer
  - B. If there is no result - there is no active account under a customer.

If we follow the above steps and locate an account in both 'Leads' and 'Customers' then we need to set one of those accounts as inactive.

## Possible Cause 02:

There is one active and one inactive account present but the system is unable to decipher which account to assign this import to.

## The Solution:

If we are importing for an inactive account, in the column 'Include Inactive Items' we can leave blank or put 'YES' (a blank cell will be interpreted as 'YES'). This tells the system to import against the inactive account of that number.

If we are importing for an active account AND there are duplicate inactive accounts already in the system then 'Include Inactive Items' needs to be set as 'NO' (we do not want to import against any inactive accounts, only the active accounts).

## Possible Cause 03:

The Supplier name is wrong.

## The Solution:

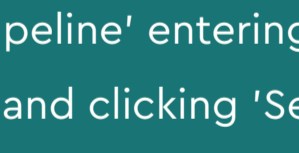
When importing we need to make sure that the Supplier entered within the import is the same as the supplier stored within the system. We can do this by visiting 'Pipeline' and entering the account number into the 'Other' field and clicking 'Search Pipeline'. If we click the 'All' tab to see all contracts we can now make sure that the supplier matches the contract that we're importing for.

## Possible Cause 04:

The contract is marked as 'Do not Include in Forecasting'.

## The Solution:

We need to check if the contract should be included. We can do this by visiting 'Pipeline' entering the account number into the 'Other' field and clicking 'Search Pipeline'. On the results page click "Go" on the contract you're importing for, and "Edit Commissions". A popup will appear. Locate the checkbox labelled 'Include in Forecasting'. If unchecked then this account/contract can't be imported.



## The Error Message:

*Row X: The Live End Date for this Account is either not present or precedes/exceeds the end period specified.*

*Row X: The Live Start Date for this Account is either not present or precedes/exceeds the end period specified.*

## Likely Cause:

Start Date / End Date mismatch.

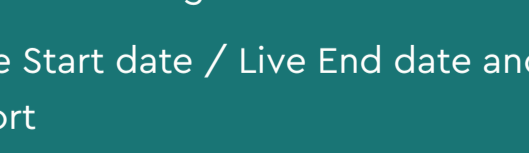
## The Solution:

Follow these instructions to check dates:

1. Open the spreadsheet for the attempted import and locate the row specified within the error message.
2. Find the Start Period / End Period date in question
3. Back in the system, visit 'Pipeline' and search for the account
4. Click the 'All' tab to see all contracts
5. Find the correct contract that relates to the import
6. Click 'Go' > 'View Contract Details'
7. Scroll down and click 'Registration' on the left-hand menu
8. Locate the Live Start date / Live End date and compare to the failed import

If the Live Start Date precedes OR exceeds the Start Period date within the failed import then the Start Period needs to be edited to match.

If the Live End Date precedes OR exceeds the End Period date within the failed import then the End Period needs to be edited to match.



e: info@utilityclick.com www.utilityclick.com

p: UK 0208 004 7060 p: USA (346) 374-0966

© UtilityClick 2023 | All Rights Reserved