Import/Export

The **Import/Export** feature allows you to manage **Imports** to, and **Exports** from, your Interpreter Intelligence system.

Imports

Go to the **'Admin'** menu and select **'Import/Export'** and you will land on the **Import** tab.
The Import feature allows you to do bulk updates or entries of data to your II system.
The most common Imports relate to the creation of profiles for **Customers**, **Requestors**, **Contacts** etc. As a general rule-of-thumb, if you have more than 100 of any set of profiles to set up, you may benefit from using an Import to create/update profile data in bulk.

- ➔ Use the **Download** link next to the Import that you wish to use
- ➔ Open the downloaded .xls file
- ➔ Where applicable, first consult the **Instructions** tab of the file - it is vital that the **Instructions** are followed precisely, any deviation from these will likely result in corrupted or useless data that can be difficult to correct
- ➔ Populate the data in the file according to the Instructions - it is vital also that the spreadsheet is not formatted, columns or headers are not moved, edited etc.
- ➔ Recheck all data according to the **Instructions** - this is especially required if data was copied from another source and may contain something that is irrelevant or incorrect to the **Import** requirements
- ➔ It is recommended that you send the file to support@interpreterintelligence.com so that it can be tested prior to live **Import**
- ➔ Click on the **Browse** button next to the relevant **Import** to choose the populated **Import** file and the click the **Upload** button - be sure that you **Upload** the file to the correct **Import** function and also that you are using the correct version of the file, delete any older/obsolete versions from your system to avoid uploading an incorrect file
- ➔ When the **Import** has completed you will receive a message informing you of how many records were Imported versus the number of records on the **Import** file, the message will also indicate any errors with the **Import** and/or any records that were skipped - contact us at support@interpreterintelligence.com if there are any issues with the **Import**

Additional Notes on Profile Imports
Customer, Client & Service Locations (Customer Addresses Import) Imports will connect/associate on the basis of Accounting Reference i.e. Clients will be attached to Customers on the basis of the Customer Accounting Reference and Service Locations will be added to Clients on the basis of Client Accounting Reference therefore it is important to align these in the respective Import files.
If your Clients do not have Accounting References, these can be created within the Client Import itself.

Note also that all Accounting References must be unique, for example, if Customer Accounting Reference is 1234, Client Accounting References could be 1234a, 1234b etc. or a different numbering sequence that is not used at Customer level.

If you plan to use any **Import** functions it is vital that you contact us at support@interpreterintelligence.com to test the data as this will avoid any subsequent issues with data which can be difficult to rectify afterwards.

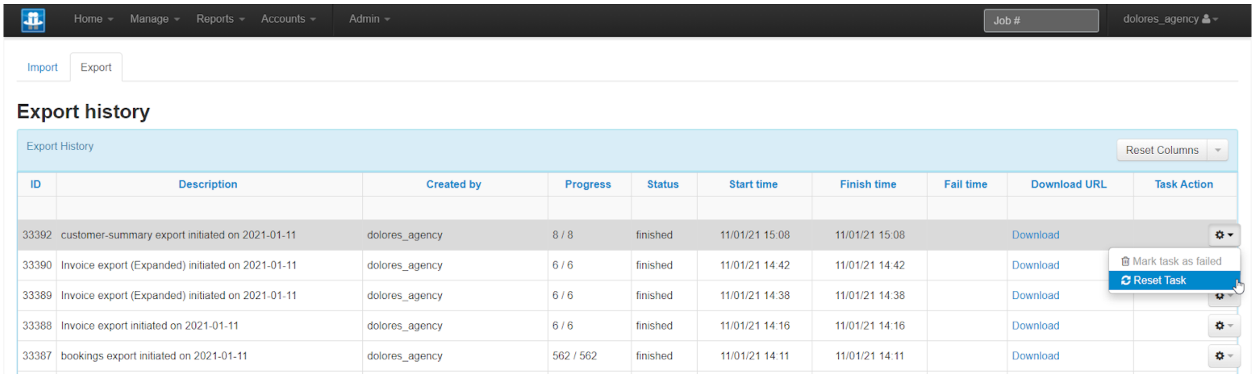
Exports

When a **Report** or any kind of **Export** is executed in II, for example creation or emailing **Invoices/Payments**, pushing **Invoices/Payments** to QuickBooks etc., the email address associated with the user account that executed the **Export** will receive an email when the **Export** is complete, to include a status of the Export and/or a download link to the exported file as applicable. Therefore, it is not ordinarily necessary to monitor Exports and, providing that they are run regularly and for relatively short periods of time, they will usually complete within minutes. If you do need to run a large or complex **Export**, it is recommended this is done at times when system usage is low such as overnight.

If an exceptionally large **Export** was executed, or you do not receive a status email, this can be monitored within the system:

- ➔ Go to the **'Admin'** menu and select **'Import/Export'** and then select the **Export** tab
- ➔ You will see a historical view of all **Exports** that have been run on your system as well as the details:
  - **ID** - a unique system ID for the **Export**
  - **Description** - the name/description of the **Export**
  - **Created by** - the user account that triggered the **Export**
  - **Progress** - this will provide a snapshot of the progress of the **Export**; the first number indicating the how many records have been processed and the last number being the total number of records that have to be processed - this, in conjunction with **Start time**, will provide a rough indication of how long the **Export** may take to run
  - **Status** - **finished** indicates that the **Export** is complete and can be downloaded, **started** indicates that the **Export** is still in progress, **failed** indicates that the **Export** has failed for some reason
  - **Start time** - the time that the **Export started** within the system
  - **Finish time** - the time that the **Export finished** within the system
  - **Fail time** - if the **Export** has **failed** for some reason, this will indicate the failed time
  - **Download URL** - the Export can be downloaded from here if another user wishes to download/instead of accessing via email
  - **Task Action** - if an **Export** has **failed**, you can **Reset Task** using this dropdown menu, it is recommended that you check email initially as there may be a specific error that has caused the **Export** to fail and you may have received an email to indicate the cause. Similarly, if an **Export** has a status of **started** but is no longer

progressing, you may need to **Mark task as failed** and re-run the report, see above on large **Exports** and system resources. If there are a number of Exports stuck in a started status and you receive an async task error message, these tasks will need to be cleaned up (**Mark task as failed);** these will normally be cleaned up automatically and periodically by the server but may occasionally need to be done manually.



For any additional information, please contact support@interpreterintelligence.com