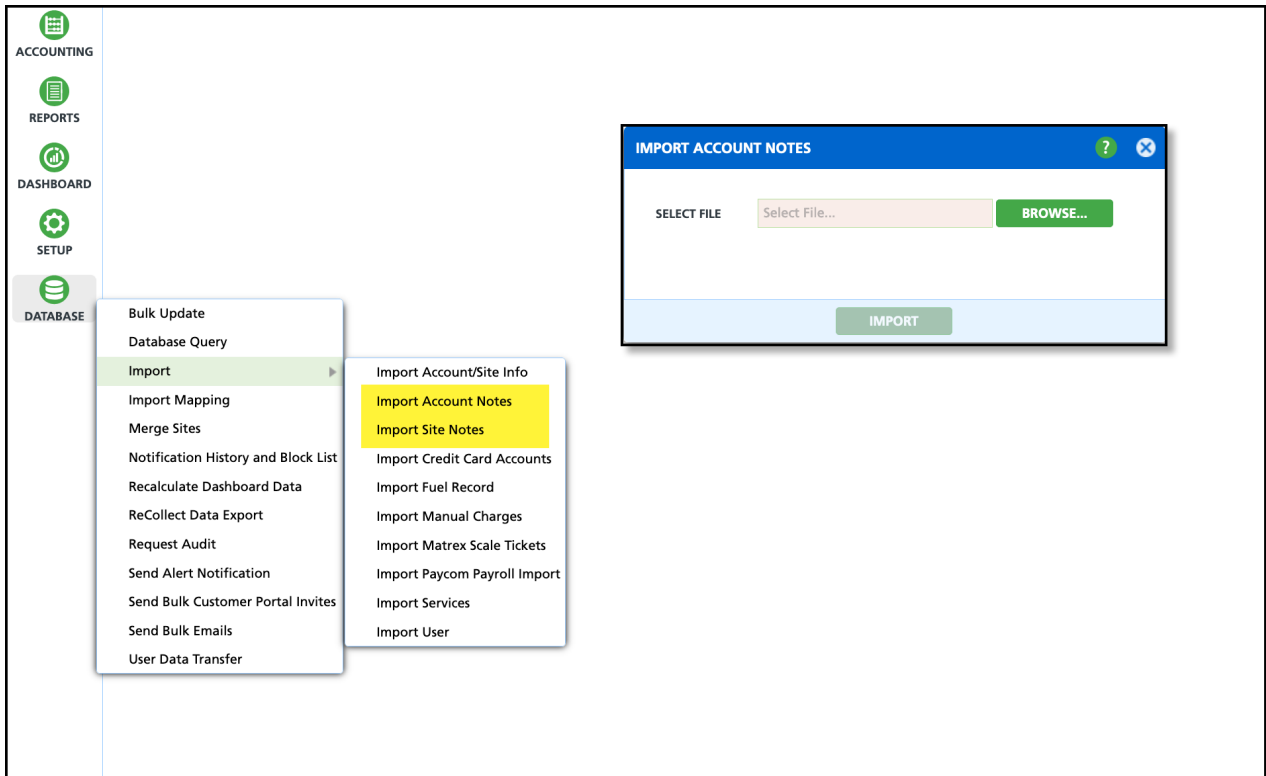


Import Account or Site Notes

Last Modified on 01/10/2025 10:20 am PST

Pathway: Database > Import > Import Account Notes; Import Site Notes

The following article captures the requirements of importing account and site notes.



Required Permissions

The following permissions are required to access Import Account Notes and Import Site Notes:

Permission ID	Permission Name
470	Import Account Notes
471	Import Site Notes

File Format Requirements:

- CSV

Column Header File Requirements

To import a file successfully, it must contain the following five columns in the order shown in the example below. Column headers must be placed in the first row. **Account and site imports must be in separate files.** For an Account Note Import, any records referencing site IDs will fail. Similarly, for a Site Note Import, any records containing account IDs will fail.

	A	B	C	D	E
1	External ID or Account/Site ID	Note Type ID	User ID	Timestamp	Notes

2					
3					

Import Logic

- **External (Account/Site) ID or Account/Site ID**
 - Account Import: The system will first look at Account.External_ID and if no match will then try Account.ID.
 - Site Import: The system will first look at Site.External_ID and if no match will then try Site.ID.
- **Note Type ID**
 - **Must be** a numerical value for the system to map on.
 - Review your system's note type IDs in *Setup > Account > Note Type* to help identify correct ID assignment.
- **User ID**
 - **Must be** a numerical value for the system to map on.
 - Reference user IDs in *Setup > System > User* to help identify correct ID assignment.
- **Timestamp**
 - Accepted formats: yyyy-mm-dd HH:mm or ISO 8601 yyyy-mm-ddTHH:mm:ss
 - 24 hour format is used
 - Seconds are optional

After Import is Complete

Review the Returned File

After the import is complete, the system notifies the initiating user with a blue popup notification and a Confirmation popup to review the results. The returned file includes additional "Message" and "Status" columns, detailing which notes were successfully imported and identifying any failures along with their corresponding error reasons.

	A	B	C	D	E	F	G	H
1	External ID	Note Type ID	User ID	Timestamp	Notes	Message	Status	
2	49232	11	5	12/12/24 7:30			Success	
3	49232002	2	5	12/12/24 7:31	Site test	Account not found for # 49232002	Failure	
4	44671	5	5	12/12/24 7:32	Account Test		Success	
5	44442	5		12/12/24 7:33		Error in creating Note	Failure	
6								
7	Site ID entered		Empty cell					
8								
9								
10								
11								
12								
13								

Review Accounts/Site

Review the uploaded notes on the Customer Service calendar, where each the note will display on the timestamped date specified in the import file.

CALENDAR January, 2025 EVENTS Note

SUN MON TUE

Dec 29, 2024 Dec 30, 2024 Dec 31, 2024

Jan 5 Jan 6 Jan 7

Jan 14 Jan 21

✓ Collections

EDIT NOTE ? X

CREATED ON 01/07/2025 11:31 am

NOTE TYPE Collections (Admin)

NOTE
This was imported from Database > Import > Import Account Notes

SAVE DELETE