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Overview

During the invoice import process there may be some information in the invoice file that does not exactly match up with information already in MRSware. When this happens a conflict occurs. Before the non-matching data or value from the invoice is credited in MRSware, the conflict must be resolved. This process is known as conflict resolution.

❗ If the conflicts are not resolved, the data from the invoice import will be incomplete and the resulting sales and/or commission numbers in MRSware will not match the totals on the spreadsheet sent from the manufacturer.

The good news is, once a conflict is resolved, it most likely will not appear as a conflict in the future.

Exceptions that will require you to resolve a conflict every time are:

- when the information changes on the invoice file (a name change)
- when an invoice displays a Ship-To address (re-distributor's trace sales)

There are two options for when you resolve conflicts:

- 1 – immediately following the invoice import using the *Invoice Import Wizard*
- 2 – at a later time using the *Import Conflict Resolution Wizard*

1 - If you want to resolve conflicts using the *Invoice Import Wizard*, check the box next to "Resolve conflict and/or errors for this batch" on the *Wizard Complete* screen. (Figure 1) Click "Next".

Possible records	
Possible records	29

Data Read Results	
Processed	27
Errored	0
Skipped	0

Data Processing Results	
Complete	26
Incomplete	1

☒ Resolve conflict and/or errors for this batch

< Back Next > Cancel

Figure 1

2 – If you want to use the *Import Conflict Resolution Wizard*, go to the MRSware Home Page, look at the *Import Conflicts* panel and click on the import batch to resolve (Figure 2).

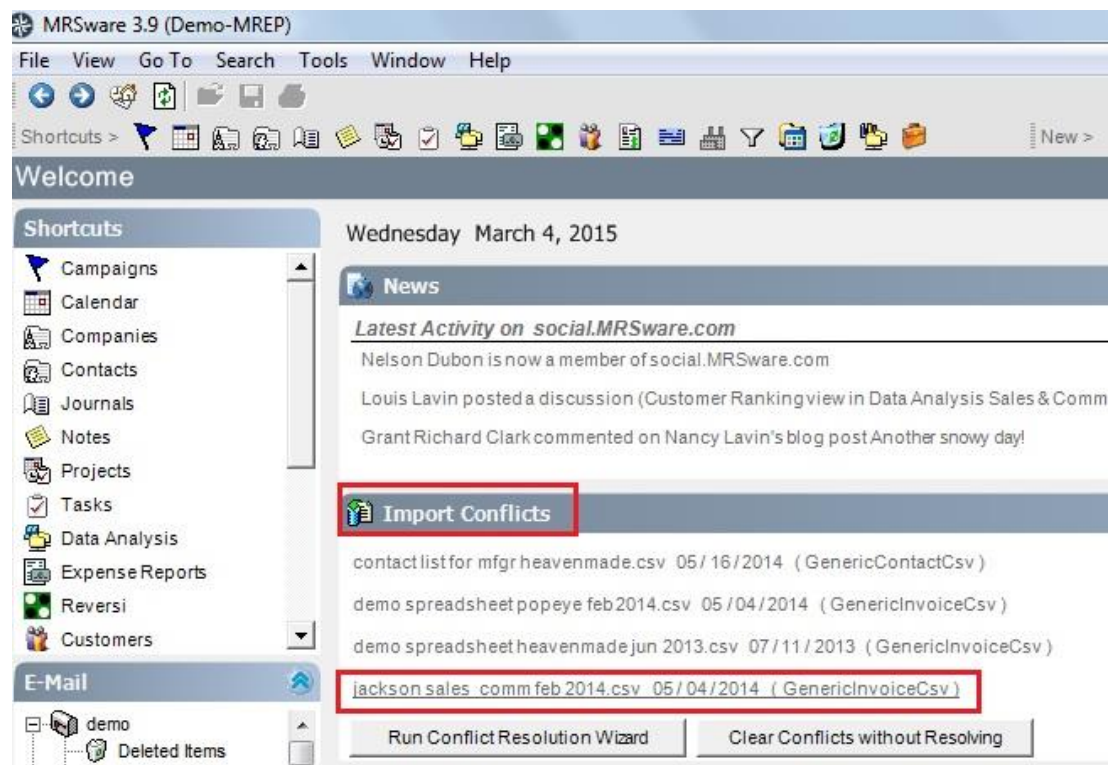


Figure 2

Conflict Type

This section will describe the four different types of conflict that may occur during the import process that cause the invoice file from importing completely.

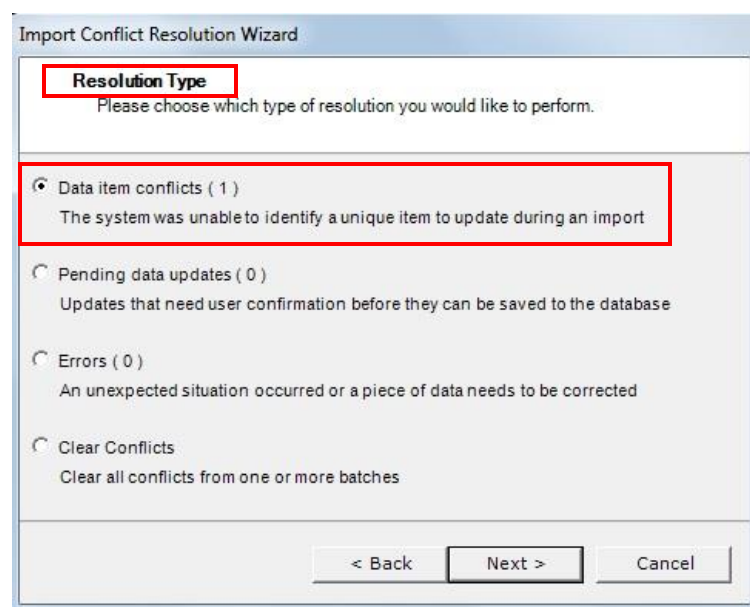
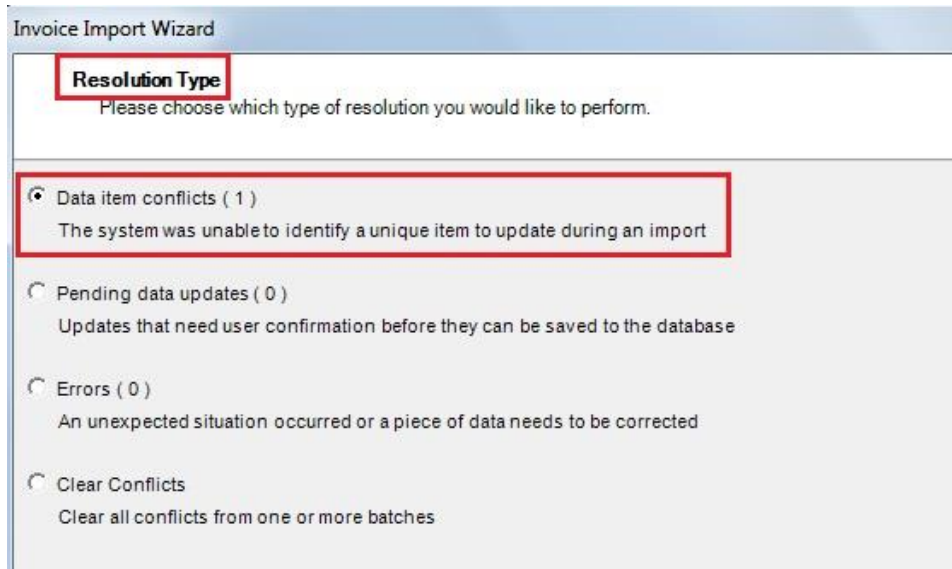


Figure 3

Data Item Conflicts

When there is a question about which company an invoice should be assigned to, a data item conflict occurs. For example, the company name in the invoice file does not match a company name in MRSSware (Granite – invoice; Granite Distributors – MRSSware). (Figure 8) Or, the company name may match, but the addresses, if provided, are different. Or, the company in the invoice file is a new company that is not yet in the MRSSware system. (Figure 5)



The screenshot shows the 'Invoice Import Wizard' window. The title bar is 'Invoice Import Wizard'. The main content area is titled 'Resolution Type' in a red box. Below the title, it says 'Please choose which type of resolution you would like to perform.' There are four radio button options: 'Data item conflicts (1)' (selected, highlighted with a red box), 'Pending data updates (0)', 'Errors (0)', and 'Clear Conflicts'. Each option has a description below it: 'The system was unable to identify a unique item to update during an import' for Data item conflicts, 'Updates that need user confirmation before they can be saved to the database' for Pending data updates, 'An unexpected situation occurred or a piece of data needs to be corrected' for Errors, and 'Clear all conflicts from one or more batches' for Clear Conflicts.

Figure 4

In the *Invoice Import Wizard*, conflicts appear on the *Wizard Complete* screen shown as “Incomplete” files. (Figure 1) Click “Next” to go to the *Resolution Type* screen to see the number of *Data item conflicts*. (Figure 4)

In the *Import Conflict Resolution Wizard*, the *Data item conflicts* appear on the *Resolution Type* screen. (Figure 3)

Click “Next”.

The *Item Conflict Chooser* screen displays the name(s) of the items to be resolved. (Figures 5 and 8)

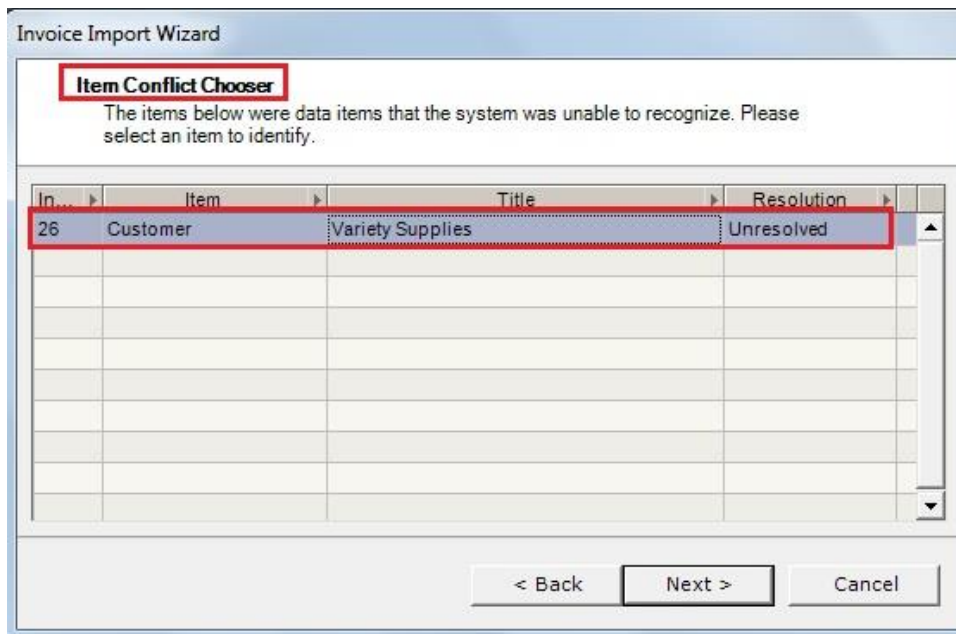


Figure 5

Select a name from the list, (Figure 5), and click "Next".

The next screen is the *Possible Matches* screen. (Figure 6)

This screen has three sections:

1. The top section shows the name of the *Selected conflict* and the data found on the invoice – *AccountName*, *AccountNo*, *InvoiceNo*, etc.
2. The middle section shows the possible matches found in MRSware. You can click on *Recommended*, type a name in the *Search by Name* field, or check the box next to *Match by Address* fields.
3. The bottom section shows the three options for resolving the conflict – *Use the selected match*, *Add the data as a new record*, and *Do nothing, delete this conflict*.

Possible Matches

The table below shows potential matches for the chosen data conflict. Please select the matching data item or manually edit the data.

Selected conflict: Variety Supplies **1**

Imported record

AccountName	Variety Supplies
AccountNo	157010
InvoiceNo	jj01
InvoiceDate	2/26/2015
Sales	\$1,243.87
Commissions	\$62.19
StreetAddress	59 Hannity Lane
City	Stout
State	MA

Possible matches **2**

Show: [Recommended](#) Or Search by Name

☐ Match Address fields (City, State and Zip)

Id	Mat...	Customer	Business Address	Shipping Address

☐ Use the selected match ☒ Add the data as a new record ☐ Do nothing, delete this conflict **3**

Figure 6

Add the data as a new record

In the example (Figure 5) we selected Variety Supplies.

The *Selected contact* is Variety Supplies and the top section shows the data from the imported invoice.

The *Possible matches* section shows no matches.

Since there are no possible matches, click the circle next to "Add the data as a new record".

Click "Next".

The next screen is the *Execute Updates* screen which will resolve this conflict and others with the same name in the same batch. (Figure 7)

Click "Next".

If there is more than one name, the wizard you will go back to the *Item Chooser* screen so you can select the next name in the list. (Figure 8)

If there is only one name, the wizard will take you to the next resolution type of conflict to be resolved (if any).

If there are no more conflicts, the *Wizard Complete* screen will open. (Figure 17)

Click "Finish".

Invoice Import Wizard

Execute Updates
To execute the resolved conflict, click Next. Otherwise

☒ Resolve additional items

☒ For the same batch I've already chosen

☐ For a different batch that I will pick

☒ Use this resolution to update similar conflicts

☒ Resolve similar conflicts in the same batch only

☐ Resolve similar conflicts in all batches

Figure 7

Use the selected match

If there is more than one conflict the *Item Conflict Chooser* will display a list of companies that do not match names in MRSware and need to be resolved. (Figure 8)

Click on one of the names in the list (in the example we selected "Granite")

Click "Next".

Import Conflict Resolution Wizard

Item Conflict Chooser
The items below were data items that the system was unable to recognize.
Please select an item to identify.

In...	Item	Title	Resolution
6	Customer	Granite	Unresolved
7	Customer	ABC Paper Co, Inc	Unresolved
8	Customer	Alpine Paper & Plastics - Walterville, MA	Unresolved
11	Customer	Burger Food Supply	Unresolved
14	Customer	Sackett Sup	Unresolved
15	Customer	Van Industries	Unresolved
24	Customer	Granite	Unresolved
25	Customer	ABC Paper Co, Inc	Unresolved
28	Customer	Burger Food Supply	Unresolved
31	Customer	Sackett Sup	Unresolved
32	Customer	Van Industries	Unresolved
35	Customer	Alpine Paper & Plastics - Walterville, MA	Unresolved

< Back Next > Cancel

Figure 8

Possible Matches
 The table below shows potential matches for the chosen data conflict. Please select the matching data item or manually edit the data.

Selected conflict: Granite

Imported record

CompanyName	Granite
AccountNumber	229
InvoiceNumber	h115
InvoiceDate	2/6/2015
SalesTotal	\$2,698.15
CommTotal	\$134.91
BusinessStreet1	PO Box 6547
BusinessCity	Mapleville
BusinessState	NH
BusinessZip	3108

Possible matches

Show: Recommended Or Search by Name

☐ Match Address fields (City, State and Zip)

Id	Mat...	Customer	Business Address	Shipping Address	Sales Rep
13	5	Granite Distributors	PO Box 6547, 8001 S. Elm Street, M...	none	Weston, Matthew

☒ Use the selected match
 ☐ Add the data as a new record
 ☐ Do nothing, delete this conflict

Figure 9

The *Selected contact* is Granite and the top section shows the data from the imported invoice.

The *Possible matches* section shows a Granite Distributors, the Business Address in MRSware, and the Sales Rep.

If this matches the company from the invoice file, in the bottom section, click in the circle next to "Use the selected match". (Figure 9)

The next screen is the *Execute Updates* screen which will resolve this conflict and others with the same name in the same batch. (Figure 7)

Click "Next". The wizard will take you back to the *Item Conflict Chooser* screen so you can select the next name in the list – ABC Paper Co, Inc.

**** Notice the second Granite in the table has been resolved and is no longer in your list of companies**

Continue until all Data item conflicts have been resolved.

Pending Data Updates

Once the Data item conflicts have been resolved, the wizard automatically continues to the next type of conflict – Pending data updates. When the company found on the imported invoice matches a name found in MRSware, but a piece of the information does not match, a pending data update conflict occurs. For example, the system type, street address, zip code, phone number, etc. may be different. The system creates a conflict so you can update your records in MRSware if necessary. (Figure 10)

Import Conflict Resolution Wizard

Resolution Type
Please choose which type of resolution you would like to perform.

☐ Data item conflicts (4)
The system was unable to identify a unique item to update during an import

☒ Pending data updates (31)
Updates that need user confirmation before they can be saved to the database

☐ Errors (0)
An unexpected situation occurred or a piece of data needs to be corrected

☐ Clear Conflicts
Clear all conflicts from one or more batches

< Back Next > Cancel

Figure 10

Click "Next". The *Pending Data Updates* screen shows a list of items that need to be resolved. (Figure 11)

Import Conflict Resolution Wizard

Pending Data Updates
Below are the pending data updates for the selected batch. Please choose how each item should be updated.

Type	Name	Field	New Value	Original Value
Contact	Burton, Kenny	ContactTypeld	Other	Customer
Contact	Calvert, Gloria	ContactTypeld	Other	Customer
Contact	ABC Paper Co, Inc	BusinessAddress-Street1	P O Box 48	33 Walden St
Contact	Calvin, John	ContactTypeld	Other	Customer
Contact	Benford Supply	ContactTypeld	Other	Customer
Contact	Clinton, Andy	ContactTypeld	Other	Customer
Contact	Crosby, Jane	ContactTypeld	Other	Customer
Contact	Handley, Ray	ContactTypeld	Other	Customer
Contact	Burger Food Supply	ContactTypeld	Other	Customer
Contact	Hopper, Patricia	ContactTypeld	Other	Customer
Contact	Granite Distributors	ContactTypeld	Other	Customer
Contact	Carter, Dave	ContactTypeld	Other	Customer
Contact	Knightley, Corey	ContactTypeld	Other	Customer
Contact	Knightley, Tiffany	ContactTypeld	Other	Customer
Contact	Magic Foodservice S...	ContactTypeld	Other	Customer
Contact	Malfov, Draco	ContactTypeld	Other	Customer

☒ Use New Value
 ☐ Keep Original Value
 ☐ Ignore
 ☐ Other

☒ Create system rules to avoid these conflicts in the future

< Back Next > Cancel Help

Figure 11

The *Pending Data Updates* screen has 3 sections: (Figure 11)

1. Near the top of the screen are column headers showing the kind of information that needs to be resolved – *Type*, *Name*, *Field* – and the values. The *New Value* represents the new information (from the imported invoice) and the *Original Value* represents the original information (from MRSware).
2. The center section is a table showing the conflicts.
3. Near the bottom of the screen, the options available for choosing to resolve the conflict are shown – *Use New Value*, *Keep Original Value*, *Ignore*, *Other*.

Here are some examples of different conflicts and how to resolve them:

Select one row or multi-select rows* that will be resolved by choosing the same value. (Figure 12)

A - In the example, all conflicts with the Field name - *Contact Type* – can be multi-selected before choosing either the *New Value* - *Other* or the *Original Value* - *Customer*.

ContactTypeId indicates that the System Type found in MRSware is in question and needs to be resolved. If *New Value* is selected, the System Type will be changed to *Other*. If *Original Value* is selected the System Type – Customer – will remain the same.

In this example, the *Original Value* – *Customer* - is the desired choice.

Multi-select the rows that need to have the *ContactTypeId* field resolved and click “Keep Original Value”. A red flag will appear in the first column of every row selected.

*multi-selected rows must be resolved using the same value for all.

Import Conflict Resolution Wizard

Pending Data Updates
Below are the pending data updates for the selected batch. Please choose how each item should be updated.

Type	Name	Field	New Value	Original Value
Contact	Burton, Kenny	ContactTypeId	Other	Customer
Contact	Calvert, Gloria	ContactTypeId	Other	Customer
Contact	ABC Paper Co, Inc	BusinessAddress-Street1	P O Box 48	33 Walden St
Contact	Calvin, John	ContactTypeId	Other	Customer
Contact	Benford Supply	ContactTypeId	Other	Customer
Contact	Clinton, Andy	ContactTypeId	Other	Customer
Contact	Crosby, Jane	ContactTypeId	Other	Customer
Contact	Handley, Ray	ContactTypeId	Other	Customer
Contact	Burger Food Supply	ContactTypeId	Other	Customer
Contact	Hopper, Patricia	ContactTypeId	Other	Customer
Contact	Granite Distributors	ContactTypeId	Other	Customer
Contact	Carter, Dave	ContactTypeId	Other	Customer
Contact	Knightley, Corey	ContactTypeId	Other	Customer
Contact	Knightley, Tiffany	ContactTypeId	Other	Customer
Contact	Magic Foodservice S...	ContactTypeId	Other	Customer
Contact	Malfov, Draco	ContactTypeId	Other	Customer

☐ Use New Value ☒ Keep Original Value ☐ Ignore ☐ Other [Help](#)

☒ Create system rules to avoid these conflicts in the future

< Back Next > Cancel

Figure 12

Below the Value options, by default, the "Create system rules to avoid these conflicts in the future" is checked.

Click "Next". The wizard will execute the updates (Figure 13)

Invoice Import Wizard

Execute Updates
To update all the data items and add any rules you created, click Next.

Updates to execute: 0
Rules to add: 3

☒ Execute data updates even if original value has changed

☒ Resolve additional items

☒ For the same batch I've already chosen
☐ For a different batch that I will pick

Figure 13

Click "Next". The wizard will take you back to the *Pending Data Updates* screen to continue the process.

B - The next example shows the Fields *Split Rate* and *BusinessAddress-Zip* which need to be resolved. (Figure 14) In all cases the decision is to keep the value already in MRSware.

Multi-select all rows and click on "Keep Original Value" for all. A red flag will appear in the first column of every row selected.

Import Conflict Resolution Wizard

Pending Data Updates
Below are the pending data updates for the selected batch. Please choose how each item should be updated.

Type	Name	Field	New Value	Original Value
Customer	Exceed	SplitRate	-1.0	0.5000
Customer	Magic Foodservice S...	SplitRate	-1.0	0.8000
Customer	CC Yellowfields	SplitRate	-1.0	0.8000
Contact	Nike Brothers	BusinessAddress-Zip	2214	02214
Customer	Nike Brothers	SplitRate	-1.0	0.8000
Customer	Zeta Company	SplitRate	-1.0	0.8000
Customer	Benford Supply	SplitRate	-1.0	0.7000
Customer	Speego Foodservice	SplitRate	-1.0	0.5000
Customer	Connecticut Distribut...	SplitRate	-1.0	0.7000
Customer	Hampton Janitorial S...	SplitRate	-1.0	0.5000

☒ Use New Value ☒ Keep Original Value ☐ Ignore ☐ Other [Help](#)

☒ Create system rules to avoid these conflicts in the future

< Back Next > Cancel

Figure 14

Click "Next". The wizard will execute the updates and return to the *Pending Data Updates* screen again.

C - The next example shows the Field *BusinessAddress-Street1* which needs to be resolved. (Figure 15) In this case the decision is to change the MRSware record to show the information from the spreadsheet.

Select the row to be resolved and click on "Use New Value". A green flag will appear in the first column of every selected row.

Import Conflict Resolution Wizard

Pending Data Updates
Below are the pending data updates for the selected batch. Please choose how each item should be updated.

Type	Name	Field	New Value	Original Value
Contact	Burton, Kenny	ContactTypeld	Other	Customer
Contact	Calvert, Gloria	ContactTypeld	Other	Customer
Contact	ABC Paper Co, Inc	BusinessAddress-Street1	P O Box 48	33 Walden St
Contact	Calvin, John	ContactTypeld	Other	Customer
Contact	Benford Supply	ContactTypeld	Other	Customer
Contact	Clinton, Andy	ContactTypeld	Other	Customer
Contact	Crosby, Jane	ContactTypeld	Other	Customer
Contact	Handley, Ray	ContactTypeld	Other	Customer
Contact	Burger Food Supply	ContactTypeld	Other	Customer
Contact	Hopper, Patricia	ContactTypeld	Other	Customer
Contact	Granite Distributors	ContactTypeld	Other	Customer
Contact	Carter, Dave	ContactTypeld	Other	Customer
Contact	Knightley, Corey	ContactTypeld	Other	Customer
Contact	Knightley, Tiffany	ContactTypeld	Other	Customer
Contact	Magic Foodservice S...	ContactTypeld	Other	Customer
Contact	Malfov, Draco	ContactTypeld	Other	Customer

☒ Use New Value ☐ Keep Original Value ☐ Ignore ☐ Other [Help](#)

☒ Create system rules to avoid these conflicts in the future

< Back Next > Cancel

Figure 15

Click "Next". The wizard will execute the updates and return to the *Pending Data Updates* screen again.

D - The next example shows the Field *BusinessAddress-Street1* which needs to be resolved. In this case there is a subtle difference – the *New Value* is "Rd" and the *Original Value* is "Road". (Figure 16)

Choose the value that is consistent with all your company addresses within MRSware.

In the example we selected "Use New Value". A green flag will appear in the first column in the row selected.

❗ Remember, if you do not resolve the conflicts from an invoice import, the sales and/or commission numbers showing in MRWare will be incorrect. Essentially the information is incomplete because some of the data has not been credited to a company in the system.

The last two Resolution Types are rarely used.

Errors

Once all Pending data updates have been resolved, the wizard automatically continues to the next type of conflict – Errors.

Errors occur when there are data inconsistencies either in the spreadsheet or in the map created during the Invoice Import Wizard process.

Sometimes these errors can be caught prior to completing the import process, when you see Errors in the *Pre-Processing Results* screen. (Figure 17)

When errors occur, it is recommended to contact support@mrsware.com with the details of your import process.

Invoice Import Wizard

Preprocess Results
Below are the results of the preprocessing. It is highly recommended that you follow the directions below.

Preprocessing results

Possible records 36

Data Read Results	
Processed	34
Errored	0
Skipped	0
Blank	2

Data Processing Results	
Complete	34
Incomplete	0

Existing Object Result	
Invoice	34

⚠ For 34 record(s) invoice number already exists in system from the file being imported

✗ The file does not appear to have been processed completely, it is highly recommended that you cancel this wizard and contact support@EYOND.net

< Back **Next >** Cancel

Figure 17

Clear Conflicts

This option allows conflicts for an imported batch (file) to be cleared without being resolved. If you choose this option, remember the sales and/or commission numbers showing in MRWare will be incorrect. Essentially the information is incomplete because a piece of the data cannot be credited to a company in the system.