Conflict Resolution User Manual

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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".

Invoice Import Wizard

Wizard Complete
Congratulations, all steps in the wizard are complete.

Possible records   29

Data Read Results   Data Processing Results

Processed   27   Complete   26

Errored   0   Incomplete   1

Skipped   0

☑ 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).
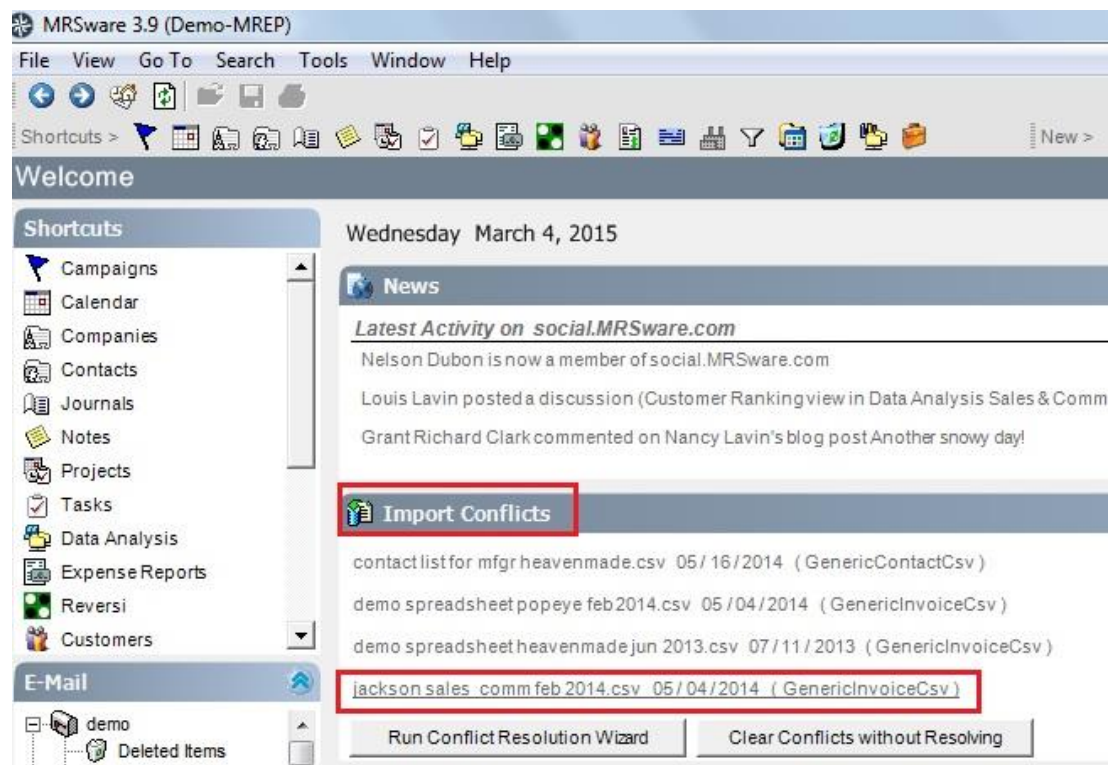

Figure 2

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.
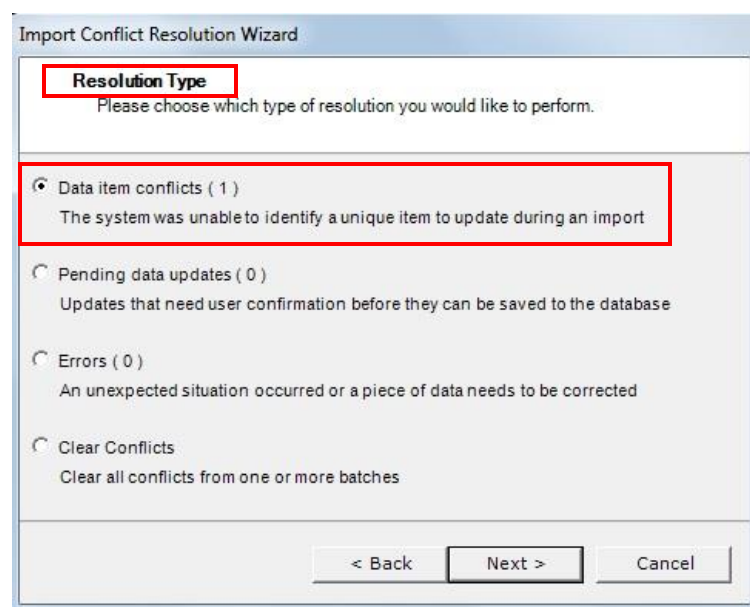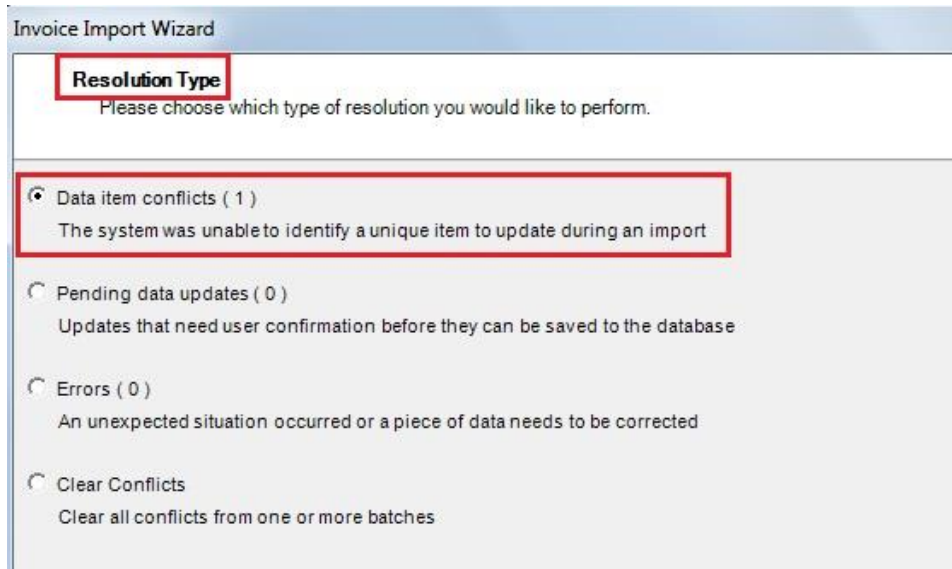

Figure 3

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 MRSware (Granite – invoice; Granite Distributors – MRSware). (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 MRSware system. (Figure 5)

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)
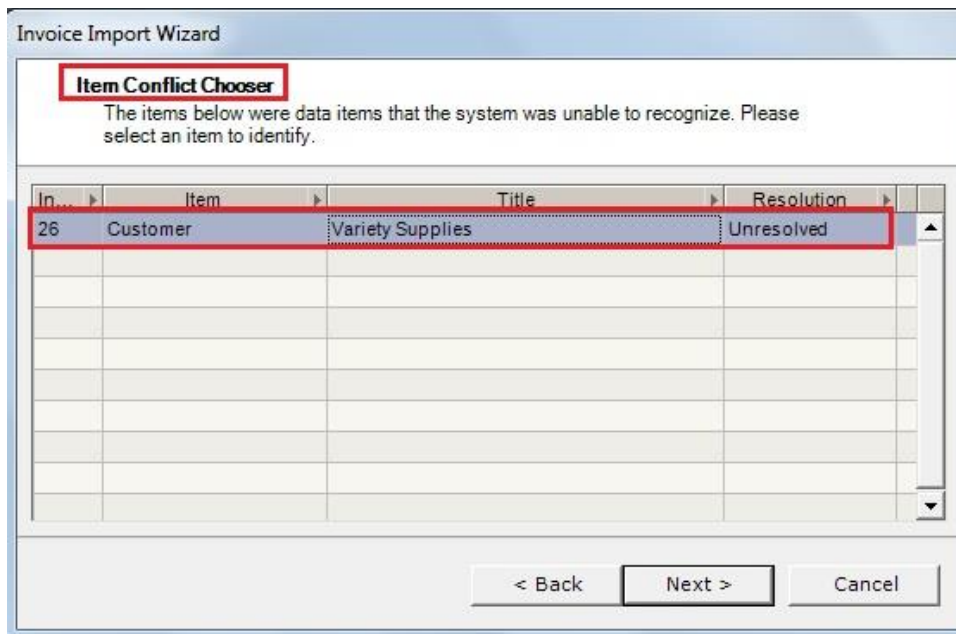

Figure 5

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.*

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".

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".

Figure 8

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)

Figure 10

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

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.

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)

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.

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.

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.

Figure 16

Click "Next". The wizard will execute the updates and return to the *Pending Data Updates* screen until all conflicts have been resolved.

The *Wizard Complete* screen appears once all conflicts have been resolved. Click "Finish". (Figure18)

Figure 18

ⓘ Remember, if you do not resolve the conflicts from an invoice import, the sales and/or commission numbers showing in MRSware 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.

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 MRSware will be incorrect. Essentially the information is incomplete because a piece of the data cannot be credited to a company in the system.