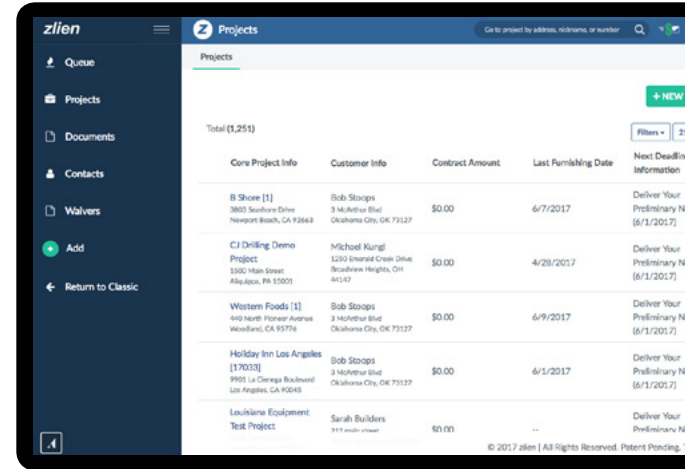# Spreadsheet Integrations
An Overview

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Many companies send project data to *zlien* via spreadsheet imports to save time and increase accuracy.

Data imports make it possible for companies with high project volume or that want to eliminate manual data entry to easily manage and track all projects in *zlien*.

Benefits

- Save time by eliminating manual data entry.

- Improve accuracy by syncing *zlien* directly with your ERP.

- Stay on top of monthly notices by automatically updating trigger dates and the amounts included in notices.

- Create waivers more quickly and easily with imported invoice data.

- Track deadlines for all projects even if you don't send notices on each one.

- Automate actions based on imported data.

There are two types of spreadsheet integrations: **Job Imports** and **A/R Imports**. Read on to see how integrations are set up, and what data points are required.

We will work with your team to ensure that your integration is successful and secure.

Spreadsheet Integrations
How It Works

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Map your data with
zlien fields

Set secure transfers
via SFTP

Data is imported
to *zlien*

Setting Up Your Integration

1. We Design Imports Based on Your Data

You send *zlien* samples of the data your team is able to provide from your invoice software or ERP. We evaluate your job information for gaps and use custom logic to fill in the blanks (i.e. if you cannot provide the project type or hiring party role, we can create defaults for you).

2. We Build Data Mappings

Once the import fields are confirmed, we submit that information to our development team. Our team sets up an adapter in *zlien* that specifically maps the fields on your spreadsheet to the agreed upon mapping. This typically takes 2 days, but occasionally as long as a week. We test the import in our staging environment to ensure that it maps according to your request.

3. You Set SFTP Recurring Transfers

Once we confirm the data import is working properly, we send you SFTP credentials so you can create a secure and automatic transfer of your data to *zlien* on a recurring basis. You choose how often the data transfers, for example, daily, weekly, etc. When the setup is complete, our team will pull and import your data. Typical processing time is within 2 hours of receipt of data, and never more than 24 hours.

4. Get Started!

For quality assurance, our team is always checking your data when it comes in, and we will notify you if there are any errors or issues. If *zlien* does not receive an import at the regularly scheduled time, we will get in touch with your team to help troubleshoot any issues sending the data from your end.

Spreadsheet Imports
Data Points for Job Imports

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With **Job Imports**, you share information about your jobs with *zlien*. Certain data points are required to ensure that *zlien* can properly calculate requirements and deadlines for your projects, and send your documents correctly.

Use the charts below to determine which pieces of information are required, recommended, or optional. This chart is not comprehensive. It lists all *required* data points, but **if your system gathers more information like "property owner", it may be beneficial to send that information to** *zlien* **as well**.

Data Point*	Required?
External Project Identifier - a unique project ID	REQUIRED
Project Name - nickname for the project	RECOMMENDED
Project Type - logic can be applied	REQUIRED
Project Address - where work was performed or materials delivered	REQUIRED
Project City - where work was performed or materials delivered	REQUIRED
Project State - where work was performed or materials delivered	REQUIRED
Project Zip - where work was performed or materials delivered	REQUIRED
First Furnishing - date labor or materials first delivered	RECOMMENDED
Last Furnishing - date labor or materials last delivered	RECOMMENDED
Contract Date - date contract was signed	OPTIONAL
Completion Date - date project was completed	OPTIONAL
Contract Amount - dollar amount of contract	OPTIONAL
Outstanding Amount - recommended if not providing A/R import	RECOMMENDED
Contractor Role - your role on the job, can be auto-populated	REQUIRED
Project Legal Property Description	OPTIONAL
Labor Description - can be defaulted using Lines of Business	REQUIRED
Line of Business - required if you have multiple LOBs	REQUIRED

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Data Point - continued	Required?
Location Region	OPTIONAL
Location Identifier - must have either location name or number (or both)	REQUIRED
Project Status	OPTIONAL
Bond Number - if applicable	OPTIONAL
Customer ID - a unique number you use to identify your customers	RECOMMENDED
Customer Name	REQUIRED
Customer Address	REQUIRED
Customer City	REQUIRED
Customer State	REQUIRED
Customer Zip	REQUIRED
Customer Phone Number	OPTIONAL
Customer Email - allows sending electronic documents	RECOMMENDED
Customer Role - the system can use logic to auto-assign	REQUIRED

Complex Project Imports

Our software is smart, and it can do more than match data points. We can build custom logic to simplify the data transfer and integration.

- ✔ Example: If a contractor only works on commercial projects, there is no need to include Project Type information on every project.

- ✔ Example: If every job with a name beginning with "RE" is residential, we can automate that.

The More Data, The Better

Certain data points are essential for a successful import, but **this chart doesn't cover everything!** If you have other data points you'd like to send along, you can include those in your import.

- ✔ Example: Our JobSight team can research the property owner if you don't send the info, but if you know who the property owner is and send us that information, we have a better starting point and can verify that info.

Spreadsheet Imports
Data Points for A/R Imports

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A/R Imports share information about invoices with *zlien*. This is especially helpful for managing waivers and monthly notices in states like Texas, Tennessee, and Louisiana.

Use the chart below to determine which pieces of information are required, recommended, or optional.

Data Point	Required?
External Project Identifier - a unique identifier for each job	**REQUIRED**
Customer ID - a unique number you use to identify your customers	**RECOMMENDED**
Invoice Number	**REQUIRED**
Invoice Date	**REQUIRED**
Invoice Original Amount	**OPTIONAL**
Invoice Amount Due	**REQUIRED**
Invoice Status	**OPTIONAL**
Invoice Terms	**OPTIONAL**
Sales Person	**OPTIONAL**

Ready to Get Started?

We're here to make the process of importing data to *zlien* easy and simple for your team. Spreadsheet integrations are an excellent way to get more value out of *zlien*. Save time and increase accuracy by transferring data directly from your system to *zlien*.

Talk to us to get started.

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