

Guide 10 - Importing files

Overview

Atradius Atrium offers the possibility to upload multiple credit limit applications, non-payments cases and its related transactions in one go. This can be done by uploading a single Excel file with the relevant data taken from your own system.

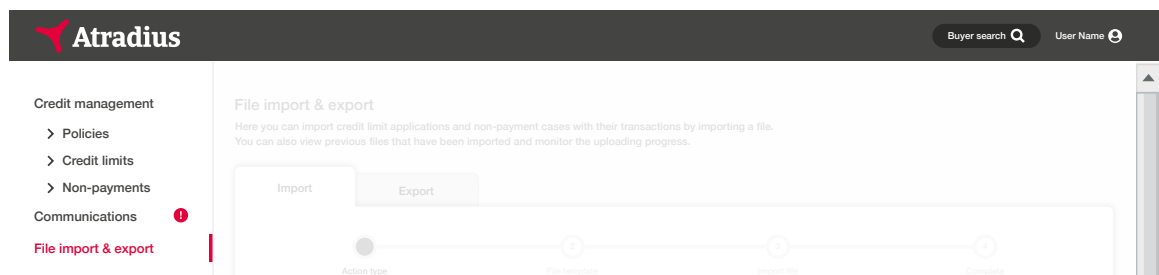
Accessing the Import tab

In order to upload a file to Atradius Atrium, you will need to access the File import & export page.

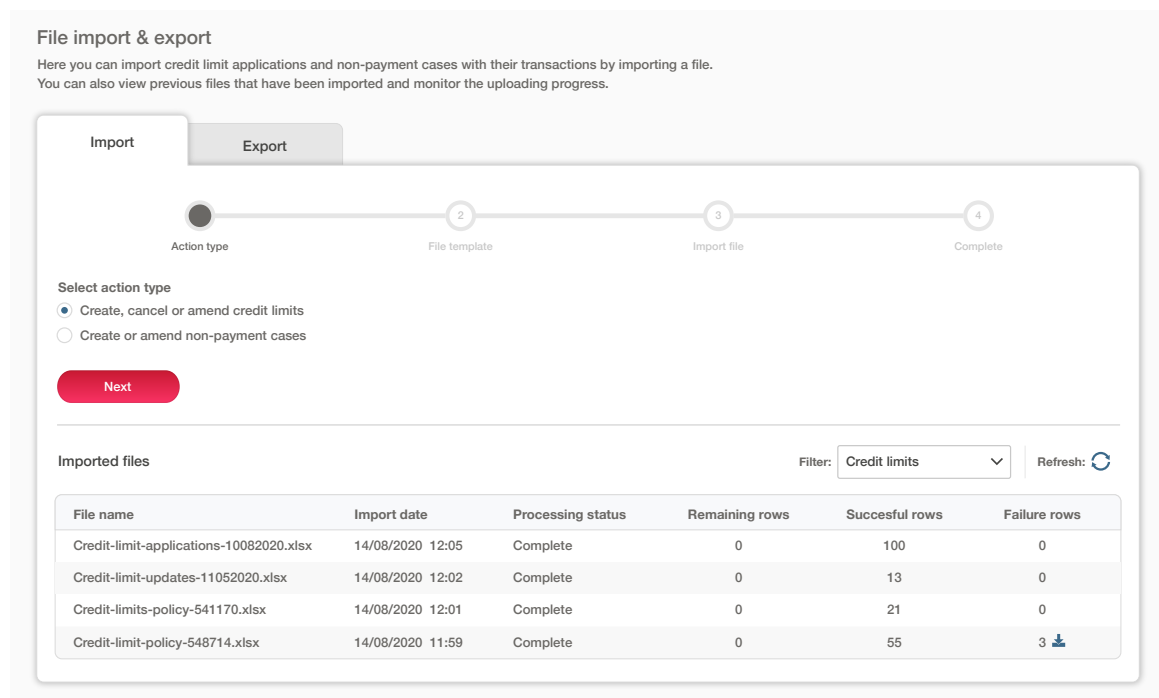


File import & export page

You can find the File import & export option in the left hand navigation menu. From here, you will be able to upload a list of credit limit applications or transactions for a non-payments case in bulk. You can also find the export files of credit limits or non-payments cases you requested to download.



On the File import & export page, you will see that there are two tabs to choose from; Import, which is active by default, and Exported files.



Read Guide 11 – Exporting files to learn more about exporting a personalised list of credit limits or non-payment cases from Atradius Atrium.

At the top of the Import tab, you will have the option to upload a new file to Atradius Atrium. At the bottom of this page, you can find an overview of all previously Imported files, where you can keep track of any files processed.

Importing a file

Before uploading your file, you will first need to select an action type for which you want to import data to Atradius Atrium. You can either decide to 'Create, cancel or amend cover' or to 'Create or amend non-payments cases'. Once selected, you can click the Next button to proceed with your file upload.

The screenshot shows a four-step progress bar at the top with steps labeled 'Action type', 'File template', 'Import file', and 'Complete'. The 'Action type' step is currently active, indicated by a black circle. Below the progress bar, there is a section titled 'Select action type' with two radio button options: 'Create, cancel or amend credit limits' (which is selected) and 'Create or amend non-payment cases'. A red 'Next' button is located at the bottom of the form.



If you need to navigate between steps of the import process, you can do this by selecting the Back link and Next button accordingly. You can also check at which stage you are by looking at the four-step tracker at the top of the page at any time.

Based on the action type you have selected, the relevant Atrium template will be automatically set to upload your credit limit application or non-payments case details.

The screenshot shows the progress bar with the 'Action type' step now completed, marked with a green checkmark. The 'File template' step is the current active step. Below the progress bar, there is a section titled 'Select a template' with a dropdown menu showing 'Cover - Standard template'. To the right of the dropdown are two links: 'Download template file' and 'Download help file'. A red 'Next' button and a blue '< Back' link are also visible.



To support you in importing your data in the right format, you can click the 'Download template file' link which will create an Excel file template ready to be used. An instruction help file is also available should you need any additional information regarding the layout of the Excel file and format of each column.


By clicking the Next button, you will be able to upload your file by clicking on the Browse button and selecting the file you want to import. Once you have selected your file, you can submit it for validation by clicking the Submit button.

The screenshot shows the progress bar with the 'Action type' and 'File template' steps completed, marked with green checkmarks. The 'Import file' step is the current active step. Below the progress bar, there is a section titled 'File upload' with a grey box containing 'No file selected'. To the right of the box is a dark grey 'Browse' button. Further right are two links: 'Download template file' and 'Download help file'. A pink 'Submit' button and a blue '< Back' link are also visible.



TIP

To ensure that your transactions will be processed correctly, Atradius Atrium will first perform a validation check on the content of your file. If there are any issues found, such as formatting errors or incorrect values, Atradius Atrium will inform you exactly of which rows need to be reviewed by highlighting them in an updated version of your file.

**Validation unsuccessful**
Unfortunately some of the data in your file needs to be amended before you can continue.

The file contains 14 rows

3 row(s) could not be validated and need to be corrected


The rows that need to be corrected have been highlighted in your excel file. Click the **DOWNLOAD** link below to amend the rows and import the file again.
[Download](#)

All values within the file that need amending will be highlighted in red, with a description of the error provided to help you correct the issue.

	H	I	
le	Currency		
		Invalid currency code	

Other issues which can be found include the type of file you are uploading, the number of rows included within your file and uploading a file with a very long file name. To avoid this from happening, it is important to make sure that:

- You are uploading an XLSX file.
- There is a maximum of 2,000 rows in your file.
- The filename does not exceed 40 characters.

**Validation unsuccessful**
Something went wrong with your file:

- The filename is too long - filename and extension should be 40 characters or less.

After making the required amendments, you can upload your file again to Atradius Atrium for validation.

Once the validation of your file is complete, a confirmation message will be displayed. When successful, you can complete the import by selecting the Submit button.

The screenshot shows a progress bar with four steps: 'Action type' (checked), 'File template' (checked), 'Import file' (not checked), and 'Complete' (not checked). Below the progress bar is a blue information banner with a white 'i' icon. The text in the banner reads: 'Your file has been validated and you can now submit your file for processing. SYMWbulkfile5(CL) contains 14 rows to process. Click Submit to process your file or upload another file to amend your submission.' Below the banner is a 'File upload' section with a file name 'Bulk Import File - Credit Limits.xlsx', an 'Update' button, and two download links: 'Download template file' and 'Download help file'. At the bottom of this section is a red 'Submit' button and a blue '< Back' link.

After submitting your file, Atradius Atrium will process your transactions. While you wait for this to be completed, you can select the 'Import another file' link which appears below the green message banner to perform another file upload. This will take you back to the first step of the import process whilst your previous import continues to be processed.

The screenshot shows a progress bar with four steps: 'Action type' (checked), 'File template' (checked), 'Import file' (checked), and 'Complete' (not checked). Below the progress bar is a green success banner with a white checkmark icon. The text in the banner reads: 'Your file has been submitted for processing. Track it's progress below under 'imported files'. If some rows failed tp process, please click the download link under 'failure rows' to amend the rows and import the file again.' Below the banner is a blue '> Import another file' link.

Viewing Imported files

As your data is being uploaded to Atradius Atrium, you will be able to monitor the progress under the Imported files section. By selecting the 'Refresh' option which appears above the table, you can update the list to show the status of the imported files being processed.



The screenshot shows the top right corner of the 'Imported files' table. It includes a 'Filter:' dropdown menu currently set to 'Credit limits', and a 'Refresh:' button with a circular arrow icon.

When viewing your processing and completed files, you can also narrow down the list by using the Filter. This allows you to view any imported files by action type, such as Credit limits and Cases.

The screenshot shows the 'Imported files' table with a filter dropdown menu open. The table has columns for 'Import date', 'Processing status', and 'Remaining rows'. The filter dropdown is currently set to 'Credit limits' and has 'Cases' selected. The 'Refresh:' button is also visible. The table content shows a file named '120.xlsx' imported on '14/08/2020 12:05' with a 'Complete' status and '100' remaining rows.

Import date	Processing status	Remaining rows
120.xlsx 14/08/2020 12:05	Complete	100


When the importing process of the file has been fully completed, a breakdown will be shown of the rows that were successfully processed and the rows which failed to be converted. For those transactions that were not successfully processed, the Failure rows column will show the number of unprocessed rows.

Imported files						Filter: Credit limits	Refresh: 
File name	Import date	Processing status	Remaining rows	Successful rows	Failure rows		
Bulk Import File - Credit Limits.xlsx	12/10/2020 14:56	Complete	0	0	1		

Selecting the download icon displayed next to this number will open an Excel file, highlighting the rows that could not be processed. This file will appear with a new column header entitled 'Error description', which will provide you with an explanation for why the row could not be imported.

M	N
Product code	Error description
CL	A credit limit application already exists and supersede is not selected

After making any corrections to the file, you can then upload this to Atradius Atrium to be processed again.

Imported files						Filter: Credit limits	Refresh: 
File name	Import date	Processing status	Remaining rows	Successful rows	Failure rows		
Bulk Import File - Credit Limits v2.xlsx	14/08/2020 12:14	Complete	0	1	0		
Bulk Import File - Credit Limits.xlsx	14/08/2020 12:15	Complete	0	13	1		