

Vendor Import & Flat File Import

Presented by Will Higginbotham



 **The Mastermind Series**

Presented by  **VERTICAN**
TECHNOLOGIES

What we will cover

- Create a new flat file XLS/CSV import for new claim placements
- Create a new flat file XLS/CSV import for vendor return files
- Modify existing import structures and mappings
- Trigger Automated Workflow via DDAS triggers
- Best Practices

Best Practices

- 🕒 Don't use special characters when creating import names
 - Underscores should be used in place of 'space'
- 🕒 Configure imports to run via Job Scheduler
- 🕒 Evaluate the bridge table via DDAS (Data Driven Automation System) during import for increased automation opportunities

Questions & Answers

Please propose your questions in the Zoom chat **to everyone**.



The Mastermind Series

To learn about upcoming trainings:

<https://vertican.tech/mastermind/>

To view past trainings:

<https://vimeo.com/vertican/>