Levelset Data Import

Data imports make it possible for companies who have high job volume or who want to eliminate manual data entry to easily manage and update all projects in Levelset.

How It Works

Send us a CSV or Excel spreadsheet (exported from your project management or accounting tool), and we'll set up a custom import in 1 week:

Export a spreadsheet from your ERP or accounting system and share it with us. (1 Day)	We map the columns of your file to properties in Levelset. (1 Day)	We build a personalized file adaptor and import your test file. (2 Days)	We'll hold a call to confirm your test data imported properly. (1 Day)

Once this set-up process is complete, you can send us your file on a recurring basis, and we'll handle the import for you within 1 business day. Email file to **data@levelset.com** or use **secure file transfer.**

There are 2 types of custom imports: **job imports** and **AR invoice imports.** Your Training and Onboarding Manager will be your main point of contact throughout this process and will be happy to answer any questions!

Custom Job Import

Required Fields

To import jobs, Levelset will need the **job address, customer details, project type, your role,** and **your company location.**

Optional Fields

Recommended (but non-required) information includes **project dates, agreement amounts,** and **other project contacts' details** (owner, GC, lender, etc.

Some of these fields can be defaulted using custom logic if you don't have a way to pull the information onto a spreadsheet export. See "Explanation of fields and behavior" below for more information.

Resources

- [Example of how your job file should look](#)

Custom AR Invoice Import

Keep the balance on each job up to date: When an invoice drops off your open aging report, we can mark the invoice as paid in Levelset.

Archive paid projects: When all invoices on a job are paid, we can archive the job in Levelset.

Re-open projects: When a new invoice appears on the aging report for an archived job, we can reopen the job in Levelset.

Use invoice dates to calculate approximate lien and notice deadlines:
- ❖ Use your earliest invoice date as a proxy for your first furnishing date on each job in Levelset. Your first furnishing date on a job typically calculates your preliminary notice deadline.
- ❖ Use your most recent invoice date as a proxy for your last furnishing date on each job in Levelset. Your last furnishing date on a job typically calculates your lien or bond claim deadline.

Required Fields

To import invoices, Levelset will need the **invoice number, outstanding invoice amount, invoice date,** and **a unique project identifier.** We will map invoices to the right job in Levelset based on this project ID, so it must match the project ID on your job import.

Resources

- [Example of how your invoice file should look](#)