



Data Importer Error Messages

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Introduction

When importing data, it is important to review the results to determine whether things worked as you expected—especially when setting up recurring imports that will be running in the background with minimal intervention. This document shows you how to download an error report for a given import job and provides guidance for how to handle any of the errors you find in the report.

Downloading an Error Report

You can download an error report either for an import job that was run manually or for any job triggered as part of a recurring series. The report consists of a comma-separated variable (.csv) file that you can save to your computer.

For a Manual Import

1. Select **Import Data** in the navigation menu. The Adhoc Imports tab is selected by default.
2. Use the **filter** button in the upper-right corner of the table section to locate a particular import job.
3. For that job, select **Actions** → **Review**. A slide-out panel opens with details for that job.
4. If any records were skipped, a Detailed Error Report section appears below the rest of the details; click the **Download** link in this section.
5. When prompted, select a location on your computer to save the report file as a .csv file. This file provides information about records from the source import file that could not be imported into Total Expert.

For a Recurring Import

1. Select **Import Data** in the navigation menu.
2. On the Data Imports page, select the **Recurring Imports** tab.

Note

By default, the table on this tab shows all the import jobs for your organization that have been triggered as part of a recurring series. This includes ad hoc and historical jobs that run according to the definition for a recurring import. Each row represents a different import job.

3. Use the **Select an import definition...** drop-down list or the **filter** button in the upper-right corner of the table section to locate a particular import job.
4. For that job, select **Actions** → **Download Error Report**.
5. When prompted, select a location on your computer to save the report file as a .csv file. This file provides information about records from the source import file that could not be imported into Total Expert.



About the Report

This report is only available if the import job has a status of Complete *and* 1 or more records in the import could not be imported. This means that the Download Error Report option is unavailable if any of the following conditions are true:

- All records in the source file were imported successfully.
- The source file had no records to be imported.
- The import failed or is still in process.

The error report contains the following information:

- **Warning** – Each row in an error report has the value `Skipped`, indicating that the information on that line was not imported.
- **Reason** – An explanation for why the data could not be imported. Check the tables below for more information.
- **(various data fields)** – The report includes 1 or more additional columns, depending on the type of information being imported (for example: Contacts, Loans, or Users). This allows you to identify the record in the source file that was not imported so corrections can be made.

Error Message List

Check the tables below for a list of possible error messages that can appear in your error report, explanations for those errors, and possible resolution steps. In some cases, errors must be rectified by a Total Expert employee. For these errors, please send an email to support@totalexpert.com with the following information:

- The import job ID (highlighted in the image of the Data Imports page below)
- Name of the import definition (highlighted in the image of the Data Imports page below)
- A copy of the error report (.csv file)
- Row number of the appropriate record in the report

Action	Job ID	Type	Name	Status	Source Record Count	Diff Record Count	Records Processed	Records Skipped	Processing Started At	Processing Completed
Actions ▾	14062842	Contacts	TE - Gerald's Contact Import	Complete	7	7	7	7	4/9/2024 7:46:31 am	4/9/2024 7:46:32 am



Note

Several of the error messages in the tables below contain placeholder text, because they can apply to multiple scenarios. The message in your error report will have the placeholder text replaced with the relevant information based on the actual error that occurred during your import. These are shown with both the general version of the error (with the placeholder indicated by `code formatting`) and an example showing a possible version as it would appear in the error report.

Inclusion or Exclusion Rule Errors

Error Message	Explanation	Resolution
Exclusion condition met. Skipping Record.	Exclusion conditions are rules created to exclude specified data from import into Total Expert. The data in this row met one or more exclusion conditions and was correctly excluded from the import.	If you feel this data was excluded in error, contact support@totalexpert.com . Include all required information listed at the top of this document.
Inclusion conditions not met. Skipping Record.	Inclusion conditions are rules created to only include specified data for import into Total Expert. The data in this row failed to meet any inclusion conditions and was correctly excluded from import.	If you feel this data was excluded in error, contact support@totalexpert.com . Include all required information listed at the top of this document.

Invalid Data or Formatting Errors

Data

Error Message	Explanation	Resolution
Record contains unsupported characters	This row in the source file contains one or more unsupported characters.	Remove unsupported characters from the source file.
Failed to process record data. Verify data formatting.	<p>The following characters are supported by the importer:</p> <ul style="list-style-type: none"> Numbers 0–9 Uppercase letters Lowercase letters [Space] Special characters: ! " # \$ % & ' () * + , - . / : ; < = <p>> ? @ [\] ^ _ ` { } ~</p>	



Error Message	Explanation	Resolution
Invalid state abbreviation: {{state_abbreviation}}	The record in question has an invalid 2-letter abbreviation. Here is the list of valid abbreviations: AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, WY	Correct the abbreviation in the appropriate row in the source file.
*For example: "Invalid state abbreviation MC"		

Dates

Error Message	Explanation	Resolution
Failed to process date. Verify formatting.	All dates in the import must match the date/time format specified when setting up the import.	Ensure all dates in your source file are formatted in your designated date/time format.
Failed to process account date field. Unable to find loan or account.	The date could not be updated because the account or loan referenced in the source file could not be found.	Verify that the ID of the target account or loan is correct in the source file and exists in Total Expert.
Failed to process account date field. Unable to find account classification.	The date could not be updated because the specified account classification could not be found. This could be due to an incorrect account classification system name. System names should not contain spaces, capital letters, or special characters other than an underscore.	Verify that the account classification in the source file is correct and exists in Total Expert.
Failed to process account date field. Unable to find organization.	The importer was unable to update the date referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.

Field Mapping

Error Message	Explanation	Resolution
Import data does not match mapping.	The data in your source file conflicts with your import mapping schema. This typically happens when the column headers in your source file do not match your mapping schema. It can also occur when the wrong type of data is in a validated field (for example, having dates appear in a field defined for email addresses).	Download your mapping .csv file from the Actions menu of the relevant import job log. Verify that: <ul style="list-style-type: none"> All fields in your source file have been mapped. The fields in your source file contain the correct type of data.



Error Message	Explanation	Resolution
<p><code>{{model}}</code> is not mapped</p> <p>For example, “User is not mapped”</p>	<p>All fields in a source file must be mapped to an appropriate field in Total Expert. Some fields have a parent/child relationship, and both the parent and child fields must be mapped. Most often this error is a result of a child field being correctly mapped while the parent field is unmapped.</p>	<p>Download your mapping .csv file from the Actions menu of the relevant import job log. Verify that the referenced field occurs in the mapping .csv file.</p> <p>If not, contact support@totalexpert.com. Include all required information listed at the top of this document.</p>
<p>Unable to create User. Verify mapping for role.</p>	<p>Users in Total Expert must be associated with a valid role. This import is trying to create a user with an invalid role.</p>	<p>Update the appropriate records in the source file with a valid role.</p>

Loan/Account Participants

Error Message	Explanation	Resolution
<p>Cannot delete required loan participant with role: <code>{{role_name}}</code></p> <p>For example, “Cannot delete required loan participant with role Borrower”</p>	<p>Organizations can require that all loans be associated with loan participants (contacts) belonging to one or more specific roles. These are referred to as “required loan participants”.</p> <p>A loan participant (contact) cannot be deleted if doing so would cause that loan to no longer be associated with a required participant.</p> <p>The contact referenced in the source file is a required participant on one or more loans.</p>	<p>Ensure that the loan referenced in the source file is associated with another participant with the required loan participant role.</p>
<p>Failed to create participant with role: <code>{{role_name}}</code></p> <p>For example, “Failed to create participant with role: Borrower”</p>	<p>When creating a loan participant, it must be associated with a role. The role must be created in TE before a participant can be associated with it. The role referenced in the source file could not be found in Total Expert.</p>	<p>Verify that the role referenced in the source file is correct. If so, verify that the relevant participant role has been created in Total Expert.</p>
<p><code>{{role}}</code> is mapped twice for loan/account participant.</p> <p>For example, “Borrower is mapped twice for loan/account participant”.</p>	<p>A single role can only be associated with a single loan participant or account participant once. The requested role was not added because the role is already mapped to the loan participant or account participant.</p>	<p>Verify that the source file contains the correct role and/or loan participant or account participant.</p>



Error Message	Explanation	Resolution
<p>Role with name <code>{{role_name}}</code> not configured for account class: <code>{{account_class_name}}</code></p> <p>For example, “Role with name Co-Borrower not configured for account class: Investment”</p>	<p>Participant roles must be associated with account classifications. The role in question is not mapped to the listed account classification, so it could not be imported.</p>	<p>Verify that the role referenced in the source file is correct. If so, verify that it is associated with the correct account classification.</p>
<p>Unable to find/create <code>{{model_name}}</code> for required participant roles: <code>{{required_participant_roles}}</code></p> <p>For example, “Unable to find/create Loan for required participant roles: Borrower, Co-Borrower”</p>	<p>The importer was unable to find or create the referenced data for the required participant role.</p>	<p>Contact support@totalexpert.com. Include all required information listed at the top of this document.</p>
<p>No role defined for existing loan participant</p>	<p>Loan participants are required to be associated with a role. The importer was unable to update the loan participant referenced in the source file because it was unable to locate the associated role.</p>	<p>Verify that the role referenced in the source file is correct. If so, verify that it is associated with the correct account classification.</p>

Custom Fields

Error Message	Explanation	Resolution
<p>Failed to process custom field. Verify mapping.</p>	<p>Custom fields are specific to an entity (such as loans or contacts). The custom field listed here is not available in the target entity.</p>	<p>Verify that the custom field referenced in the source file is correct. If so, verify that the custom field has been created under the appropriate entity in Total Expert, and that the custom field has not been archived.</p>



Error Message	Explanation	Resolution
Could not find custom field <code>{{custom_field_name}}</code> for account class <code>{{account_classification_name}}</code> For example, “Could not find custom field Servicing for account class Investment”	When creating a custom field that relates to a loan or an account, Total Expert needs to understand which type of product the custom field is affiliated with by stipulating an account classification. This enables Total Expert to display the data with the correct product type. The custom field listed here is not tied to the target account classification.	Verify that the custom field referenced in the source file is correct. If so, verify that the custom field has been created and that it is associated with the appropriate account classification.
Failed to process custom field.	The importer was unable to update the custom field referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Failed to process custom field. Unable to find organization.	The importer was unable to update the custom field referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.

Co-Marketing Partners

Error Message	Explanation	Resolution
Unable to create Co-marketing Partner. Must be Realtor user type.	Co-marketing partners must be created in Total Expert with a User Type of Realtor. This import is trying to create a co-marketing partner with a User Type other than Realtor.	Update the appropriate records in the source file with a User Type of Realtor.
Unable to create Co-marketing Partner. Verify mapping for user type.	This import is trying to create a co-marketing partner with an invalid User Type.	Update the appropriate records in the source file with a User Type of Realtor.
Unable to create Co-marketing Partner. Verify mapping for role.	Co-marketing partners in Total Expert must be associated with the appropriate role. This import is trying to create a co-marketing partner with an invalid role, or one that cannot be associated with a co-marketing partner.	Update the appropriate records in the source file with a valid role for a co-marketing partner.



Information Not Found

Error Message	Explanation	Resolution
Account classification not found for <code>{{model_name}}</code> . For example: “Account classification not found for Checking Account.”	Products in Total Expert must be associated with an account classification. The row in your source document is referencing an account classification that does not exist.	Verify that your source file contains the correct account classification. If yes, verify that the account classification exists in the Total Expert platform.
The <code>%s</code> could not be found. For example, “The Loan could not be found.”	The object you are trying to update cannot be found. Usually this means it does not exist in Total Expert or your source file is incorrect.	Verify that your source file is updating the correct object. If yes, verify that the object exists in Total Expert. If not, the object must be created before it can be updated.
Unable to find contact	The importer was unable to find the contact referenced in the source file.	Verify that the contact ID in the source file is correct and that the contact exists in Total Expert.
Unable to download image.	The importer was not able to download the image file referenced in the source file. Typically this is due to a bad URL path.	Verify that the URL in the source file is correct.
No data found for <code>%s</code> . For example, “No data found for Loan.”	There is no data in the import file for the referenced object.	Verify that the import file contains all required data.



Required Fields

Error Message	Explanation	Resolution
<p>All required fields not set for <code>{{model}}</code>. Fields required are: <code>{{required_fields}}</code></p> <p>*For example: “All required fields not set for Loans. Fields required are user.organization_id, user.role_id, user.type_id, user.status, user.is_trial, user_info.timezone_nameBorrower”</p>	<p>One or more required fields have not been provided. The list of required fields depends on the type of data you are importing:</p> <p><u>Contacts</u></p> <p>A successful contact import requires at least one of the following combinations of fields:</p> <ul style="list-style-type: none"> • first name, last name, email address • first name, last name, phone number (cell, home, or office) • first name, last name, full address (address, city, state, and ZIP code) <p><u>Loans</u></p> <p>A successful loan import requires:</p> <ul style="list-style-type: none"> • loan.loan_number • At least 1 of the required combinations of contact fields for loan participant contact records. <p><u>Users</u></p> <p>A successful user import requires:</p> <ul style="list-style-type: none"> • user.email • role.name • user-type.name <ul style="list-style-type: none"> ○ This must have the value <code>Lender</code> 	<p>Ensure your source file contains all required fields for the type of data you are importing.</p>



Disallowed Action Errors

Error Message	Explanation	Resolution
<p>The <code>{{model_name}}</code> is not allowed to be updated during an import.</p> <p>For example, “The Loan is not allowed to be updated during an import.”</p>	<p>Some items cannot be updated using the importer. These items must be updated via other means, typically the Total Expert UI.</p>	<p>Update the object in question via an approved method, such as the Total Expert UI.</p>
<p>The <code>{{model_name}}</code> is not allowed to be created during an import.</p> <p>For example, “The Loan is not allowed to be created during an import.”</p>	<p>Some items cannot be created using the importer. These items must be created via other means, typically the Total Expert UI.</p>	<p>Create the object in question via an approved method, such as the Total Expert UI.</p>
<p>Credit Score Import not permitted by organization.</p>	<p>Organizations can control whether users are able to import records that contain a credit score. Your organization does not allow importation of a credit score.</p>	<p>Remove all credit scores (including column headers) from the import file.</p>



Deduplication Errors

Error Message	Explanation	Resolution
<p>Missing data required for deduping <code>{{model_name}}</code>.</p> <p>For example, “Missing data required for deduping Loan”</p>	<p>The row was not imported because deduplication failed, and the importer was not able to determine whether the row contained data related to an existing record.</p> <p>To correctly identify whether a row in the import file is creating a new record or updating an existing record, specific criteria must be included in the row. The information required depends on the type of data you are importing and your import settings.</p> <p>Most imports require one or more of the following values:</p> <ul style="list-style-type: none"> • External ID • External ID and Account • Classification ID • User Email and User ID • Total Expert ID • First Name, Last Name, Email 	<p>Validate that all applicable information is included in the appropriate row in your source file.</p>

Update or Creation Errors

Error Message	Explanation	Resolution
Unable to create contact phone number	The importer was unable to create telephone numbers for the referenced contacts.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Unable to fetch or create contact phone number	The importer was unable to find the referenced telephone number on a contact record.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Failed to create Lead. Lead not found for organization.	The importer was not able to create or find the lead referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Failed to create %s. For example, “Failed to create User.”	The importer was unable to create the object referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.



Error Message	Explanation	Resolution
Failed to update/create %s. For example, “Failed to update/create Contact.”	The importer was unable to create the object referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Failed to update or create {{model_name}} For example, “Failed to update or create User”	The importer was unable to update or create the model referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Unable to create {{model_name}}. For example, “Unable to create Loan.”	The importer was unable to create the model referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Unable to update {{model_name}}. For example, “Unable to update Loan.”	The importer was unable to update the model referenced in the source file.	Contact support@totalexpert.com . Include all required information listed at the top of this document.

Miscellaneous Errors

Error Message	Explanation	Resolution
User does not have a provisioned phone number	SMS users must be associated with a provisioned telephone number. The user ID in your source file is not associated with a provisioned number.	Contact support@totalexpert.com . Include all required information listed at the top of this document.
Multiple \$teamColName manager columns exist in the data set For example, “Multiple external_Id manager columns exist in the data set”	Import files can contain only one Manager column for one team. The import file contains multiple columns for Manager for one or more teams.	Update the columns in the source file to remove any duplicate Manager columns.



Error Message	Explanation	Resolution
System opt-in failed	The importer was unable to associate the contacts in the source file with the referenced opt-in value.	Contact support@totalexpert.com . Include all required information listed at the top of this document.