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# Service Data Uploader



# Service data uploader

- Service data should be uploaded via the web portal on a monthly basis
- To upload data please ensure that you download the .csv file from the website. No other format will be accepted
- Reminders to upload data will be sent on the 3<sup>rd</sup>, 5<sup>th</sup> and 8<sup>th</sup> working day
- The following screens show how the service data uploader operates
- During the upload process the system performs a number of checks on the data and will reject any data that does not fit with the criteria



# Uploading service data



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Car  Bike

Sales  **Service**  Show

Dealers Selected Dealer:  Change Search dealers...

Last Imported --- Status **Data Not Submitted**

No. of Records ---

Filename used ---

Status  Logs  Email Setup

July 2014

Date Created	Event	Total Records	File Name
No records to display			

Items per Page 10 Total Items 0 in 1 Pages

- 1 To upload Service data select Data Uploader from the side of the screen
- 2 Ensure the service tab is selected
- 3 This will default to current month. To view historic information select the month required
- 4 To view Service Data Uploader Guide select 'View Step by Step Instructions'



# Uploading service data



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Car

Sales

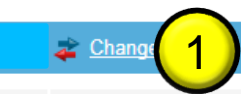
Selected Dealer:

Last Imported ---

No. of Records ---

Filename used ---

Status **Data Not Submitted**



Status

July 2014

Date Created	Event	Total Records	File Name
No records to display			

Items per Page 10 Total Items 0 in 1 Pages

The Status displays in red if data has not been submitted for the current month, in orange for failed file or green for submitted successfully

To submit data, download the .csv template. You must use this template as using others will cause the file to fail.

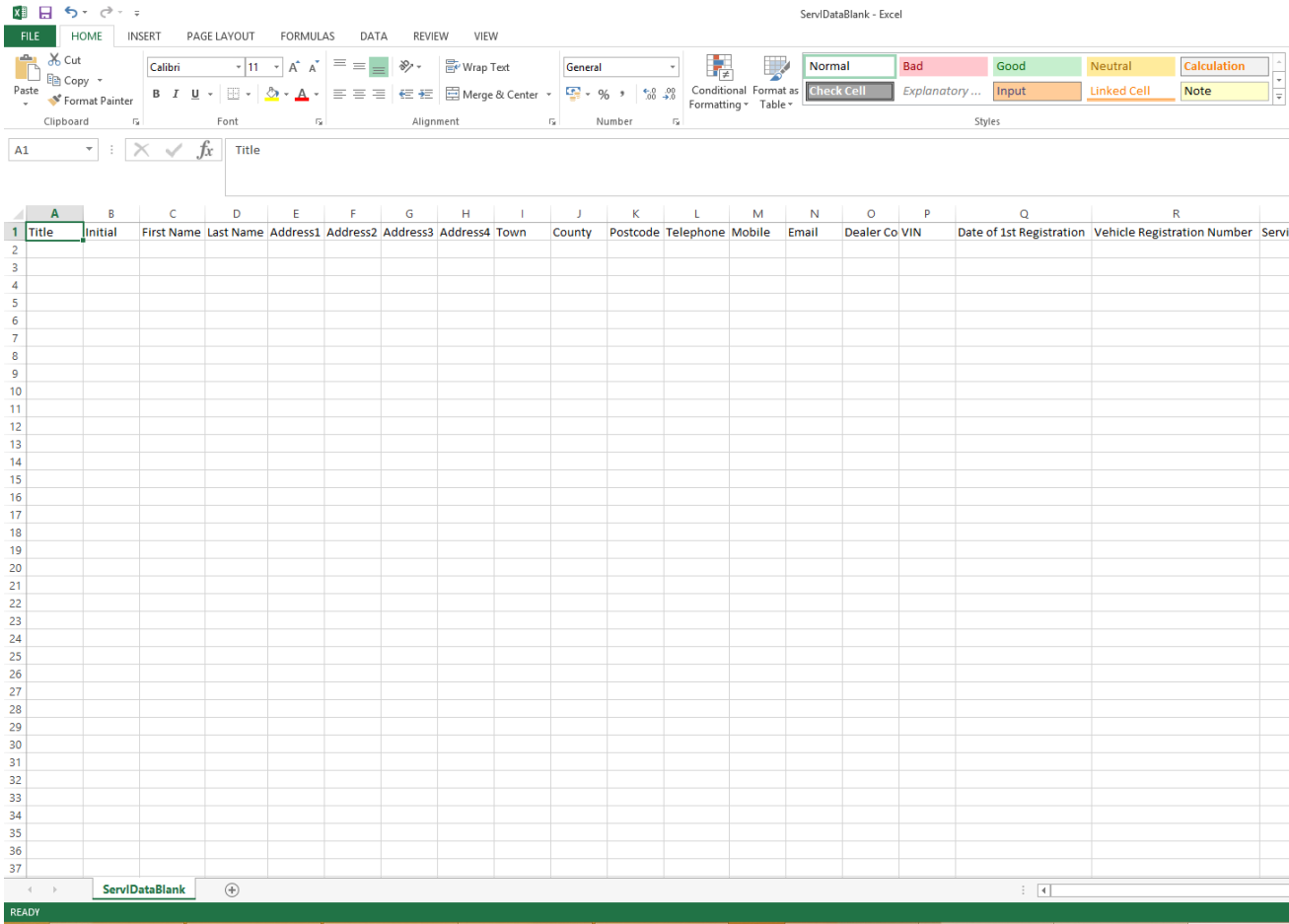
If you require any assistance please select the Email for Help button.



# The .csv template



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Save the template onto your PC.

Please do not delete or amend any headings within the file as this will cause your file to fail

When uploading the file the following will be checked to ensure:

- There is a title and last name for the customer
- The dealer code is correct
- The VIN must be the full 17 digits
- Date formats must be dd/mm/yyyy
- Registration number must be provided
- Service type must be provided
- A numeric amount must be in the invoice value field
- The service date must relate to the previous month
- Vehicles must be at least one week old and less than 3 years

**Note** - Please do not include any punctuation within the file name as this will cause the file to error e.g. hyphens, commas, apostrophes.



# Uploading service data



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Car

Selected Dealer:

Last Imported --- Status **Data Not Submitted**

No. of Records ---

Filename used ---

Status

July 2014

Date Created	Event	Total Records	File Name
No records to display			

Items per Page  Total Items 0 in 1 Pages

1 To upload a file click the Select button and choose a file you wish to upload.

2 Select upload when you have the correct file. This will attempt to upload the file.



# Uploading service data



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Car

Sales

Selected Dealer:  Search dealers...

Last Imported 31/07/2014  
No. of Records 4  
Filename used 31072014100725aut70.csv

Status **1** Data Submitted

Status

July 2014

Date Created	Event	Total Records	File Name
31/07/2014	Success Import	4	<a href="#">aut70.csv</a>
31/07/2014	Fail Import		51aut70.csv

Items per Page 10

Total Items 2

**1** The Status will change to green and say Data Submitted if your file has been successful.

**2** This page will confirm the number of records that have been submitted. This information is also confirmed on the status page.

### Note

Once the file has been successfully submitted it will be cleaned and ready for contact with the customer.

Some records may be removed from your submission during the data cleaning process.



# Unsuccessful service data upload



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Car Bike

Sales Service Show

Dealers Selected Dealer Change Search dealers...

Last Imported ---

No. of Records ---

Filename used ---

Status **Data Failed. Please retry**

View Step by Step Instructions

Email for Help

Download Template

Select Upload

Logs Email Setup

This screen displays errors and messages when you upload a file  
Spreadsheet contains errors in 2 record(s) - Spreadsheet Rejected. C

1. Rejection reason will show here  
2. Rejection reason will show here

Line No Reason

2 1 Registration Date over three months and under 5 years old!

3 17 Mileage Model: Not 800, 5000, PANDA, SEIKOYO PANDA, GRANDE PANDA, PANDA EVO, STILO, SVAHO, SEVIC, SORBO, POKING, ODDHA, BARCHETTA, IDEA, MULTIPAZ, ULTISE, QUAD!

4 1 Zero-Plate Number Found!

1

Should your file fail, the status will display in orange as Data Failed. Please retry.

2

The Logs page will display the reasons for the error, line by line.

3

The logs page only displays errors at this time in place and does not hold a historic log. If you navigate away from this page the errors will disappear.

4

To ensure you have a copy of the errors click on the icon to export an Excel spreadsheet with a list of errors.

You may choose to open/save the error log to assist with correcting the file.

Please correct the rejected records where possible and delete any records that cannot be corrected before attempting to re-upload the file. Once successful, the Status will turn to green with Data Submitted (as above).





# Email reminders for service data upload



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Car

Sales  [Show](#)

[Dealers](#) Selected Dealer:  [Change](#) Search dealers...

Last Imported	31/07/2014	Status	<input checked="" type="button" value="Data Submitted"/>
No. of Records	4	<input type="button" value="View Step by Step Instructions"/>	
Filename used	31072014100725aut70.csv	<input type="button" value="Email for Help"/>	
		<input type="button" value="Download Template"/>	

Status

Name	Email
No records to display	

Items per Page  Total Items 0 in 1 Pages

Email reminders will be sent on the 3rd, 5th and 8th working day of the month to those people listed on the Email Set-up section of the Service Upload page.

Service data must be uploaded to us by close of business on the 8<sup>th</sup> working day of the current month to ensure it is included in the call pot.



# Amending email addresses for reminders only



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1

To amend an email address e.g. To ensure that when the user is on holiday a colleague will receive the email, click on the Edit button to the left of the name.

This will then allow access to amend the email address.

Type in the email address you would like the email to go to. Multiple email addresses can be added.

Please add a ; between addresses e.g. fsmith@auracorp.co.uk; fsmith@auracorp.co.uk

3. Click on the Update button to save any changes.

1

