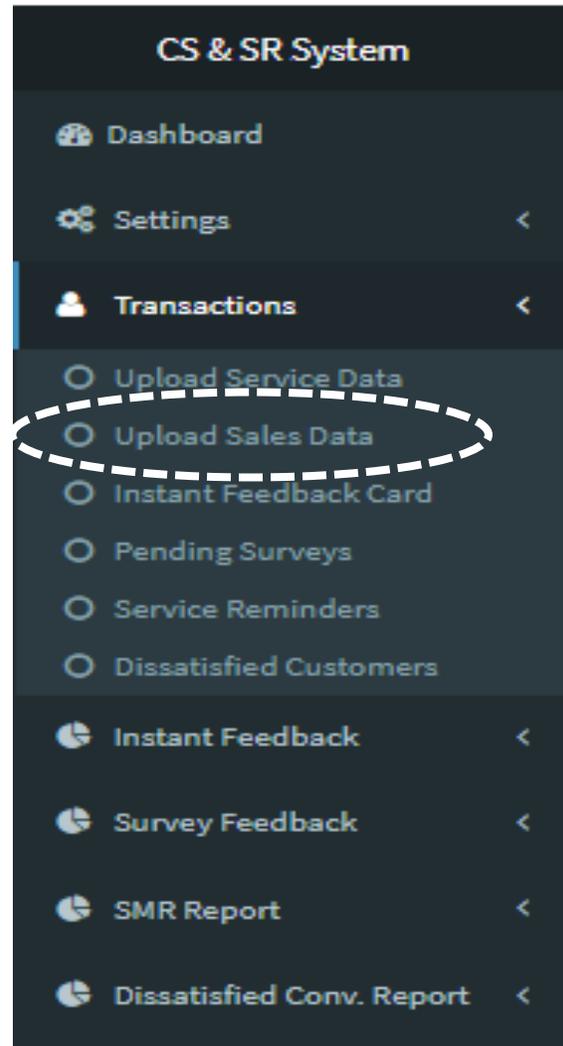


Sales Data Upload -

Steps and Processes to be followed

Uploading Sales Data ..

Step 1: Click on option “[Upload Sales Data](#)” in Menu Bar



Uploading Sales Data ..

Step 2: Following Screen appears once “[Upload Sales Data](#)” is clicked.

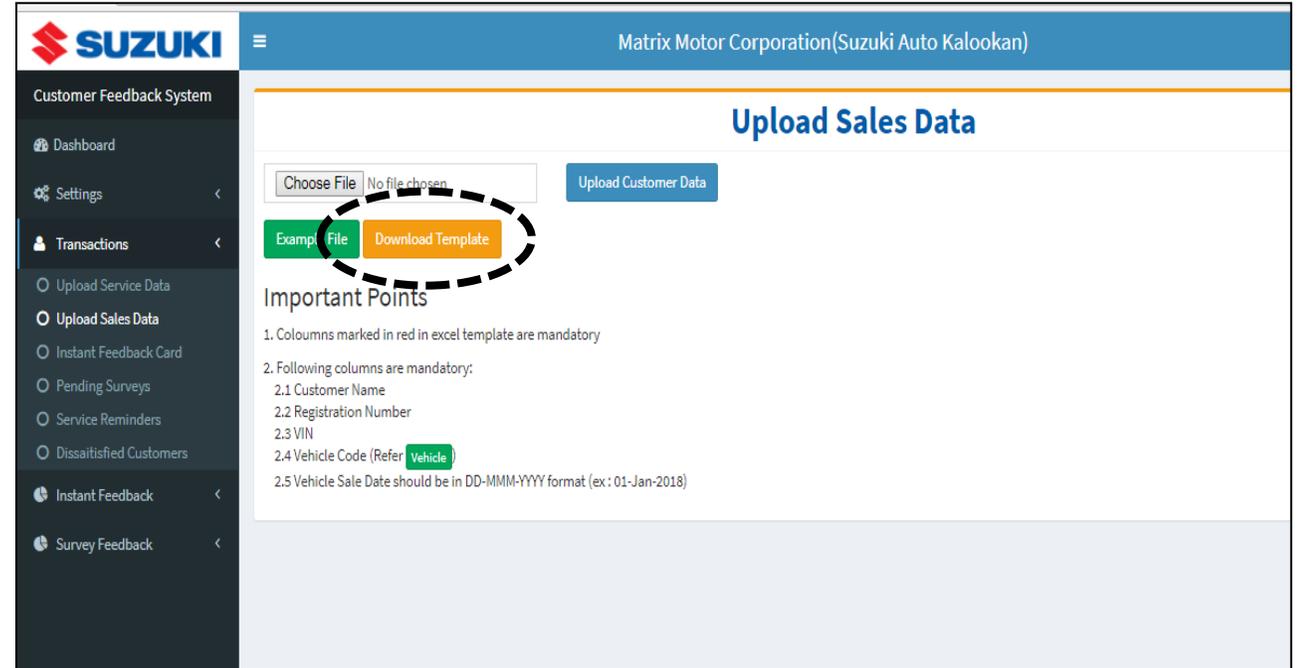
❖ The following screen will be used for uploading the Sales Data ([Details of vehicles sold](#))

The screenshot displays the 'Upload Sales Data' interface within the 'Customer Feedback System'. On the left is a dark sidebar with navigation options: Dashboard, Settings, Transactions, Upload Service Data, Upload Sales Data (highlighted), Instant Feedback Card, Pending Surveys, Service Reminders, Dissatisfied Customers, Instant Feedback, and Survey Feedback. The main content area has a white background with an orange header bar containing the title 'Upload Sales Data'. Below the header, there is a file upload section with a 'Choose File' button (showing 'No file chosen'), an 'Upload Customer Data' button, an 'Example File' button, and a 'Download Template' button. Underneath is an 'Important Points' section with the following instructions:

1. Columns marked in red in excel template are mandatory
2. Following columns are mandatory:
 - 2.1 Customer Name
 - 2.2 Registration Number
 - 2.3 VIN
 - 2.4 Vehicle Code (Refer [Vehicle](#))
 - 2.5 Vehicle Sale Date should be in DD-MMM-YYYY format (ex : 01-Jan-2018)

Uploading Sales Data ..

Step 3: To create a data file : Click on Tab “Download Template”.



Step 4: Once Dealer clicks on Download Template, following excel file will be available (reference excel format for Sales data upload) :

* Customer Name	* Contact Number	Contact Number 2	Customer Email	Registration Number	* VIN	* Vehicle Code	* Vehicle Sale Date	* Outlet Code
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** Mandatory fields*

Uploading Sales Data ..

Step 5: Enter the Sales data in the template (Note: columns with asterisk marked in red are mandatory).

➤ Data can be generated through following options :-

a) Manual entry in excel format.

b) Copy from Dealer existing data base / DMS if available and upload in “CS+SR” System by creating excel file.

c) Automatically data flow from Dealer DMS to “CS+SR” System through integration.

➤ Sample format :

* Customer Name	* Contact Number	Contact Number 2	Customer Email	Registration Number	* VIN	* Vehicle Code	* Vehicle Sale Date	* Outlet Code
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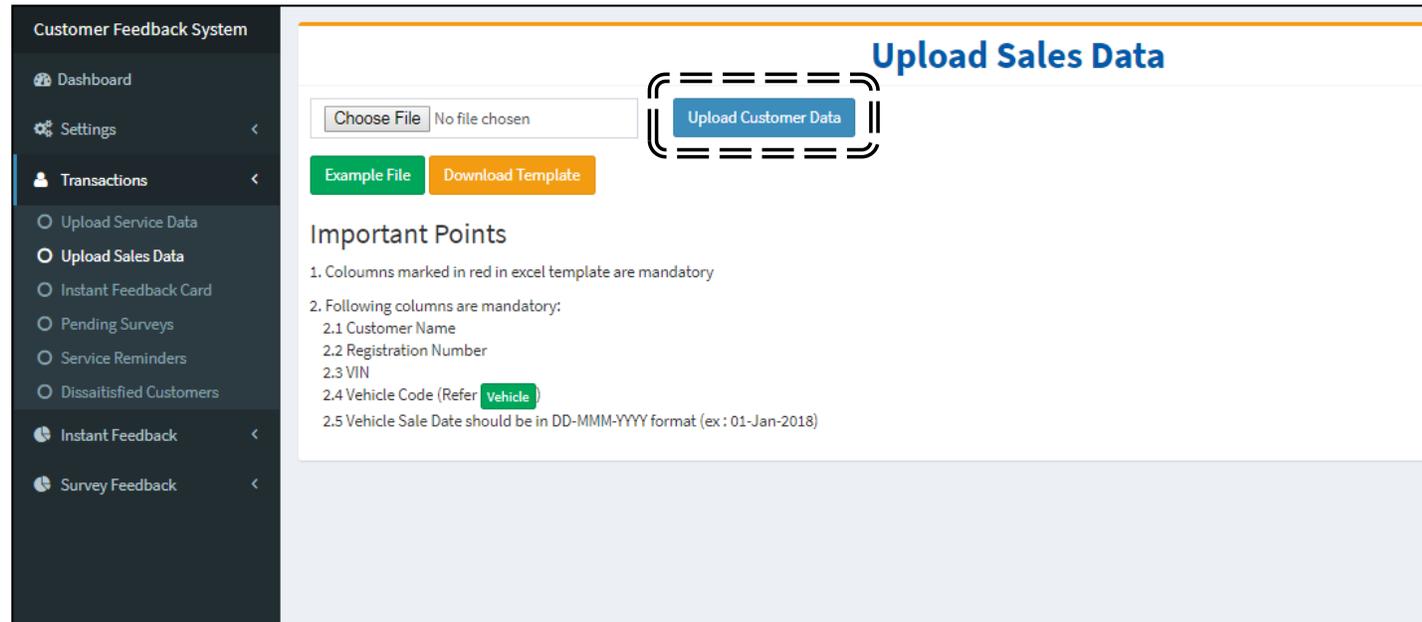
*** Mandatory fields**

Uploading Service Data ..

Step 6: Once excel file is generated, click of Tab “Choose File” for selecting the file for upload in the System.

Step 7 : After selection of file, click on Tab “Upload Customer Data” for uploading the file in System.

(Note the “Important points” listed on the screen stated while uploading the data).



The screenshot displays the 'Customer Feedback System' interface. On the left is a dark sidebar with navigation options: Dashboard, Settings, Transactions, Upload Service Data, Upload Sales Data (highlighted), Instant Feedback Card, Pending Surveys, Service Reminders, Dissatisfied Customers, Instant Feedback, and Survey Feedback. The main content area is titled 'Upload Sales Data' and features a file upload section with a 'Choose File' button (labeled 'No file chosen'), an 'Example File' button, and a 'Download Template' button. A blue button labeled 'Upload Customer Data' is highlighted with a dashed box. Below this is an 'Important Points' section with the following instructions:

1. Columns marked in red in excel template are mandatory
2. Following columns are mandatory:
 - 2.1 Customer Name
 - 2.2 Registration Number
 - 2.3 VIN
 - 2.4 Vehicle Code (Refer **Vehicle**)
 - 2.5 Vehicle Sale Date should be in DD-MMM-YYYY format (ex : 01-Jan-2018)

Thank You