Support for *GoodFlexi* users

How to upload a list of CLIENTS

You may have a list of clients you want to register into this system. This briefing tells you how to upload them. Your list needs to be formatted into a file the system can process and any incomplete details will have to be corrected after the upload.

This document takes you through the 5 steps.

Before you start

➲ Agencies using this system have different words for the households or organizations that make bookings. (For example; “caregivers”, “customers”, “purchasers”.) In this briefing we use the term “Client”.

> ☒ Do NOT change the wording in the file for upload. The word “Client” is used in the system's internal database column headings.

☑ In this process you will be handling sensitive data relating to individual users. Be sure you have permission to do this and that copies are securely stored or wiped after the upload.

➲ If you have access to a demonstration agency you might want to try uploading some fictitious data there as a trial run. (A demonstration agency is one with “demo-uflexi.com” in the URL of each screen. Systems for real data just have “uflexi.com”.)

To do this:

- Prepare some demonstration data for upload. You may want to use the blue text in our template for upload (see below). Just make sure:
    - You enter a valid name for an Advisor in the demonstration agency is added in each row. (Column Q)
    - The email addresses in Column D are changed. Like the main system, the demonstration system needs a unique email address for each Worker. We use “unusedemail” as the body of the email addresses in the template. The easiest way to turn them into addresses unique to you is to run a find/replace and change “unusedemail” to whatever word or characters you like.
    - The contract title or number (Column R) mirrors the title or number of a contract in the demonstration agency. (Find this by clicking Settings in the top menu bar then “Legal” in the side navigation. Look for the bottom tab in that section.)
- Navigate to the Upload page in your demonstration agency (you must be logged in as a superuser to access this page). Follow the instructions in sections four and five below.

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1) Collect the essential data

a) There are some basic details the system needs to create a record for each Client. In each case, you will need to know, as a minimum:

- The Client's name
- Their address
- A name and email address for their first user in the system

➲ Any of these details can be changed later. And if no users from a Client are going to log into the system directly, a fictitious email address can be used. (They won't need to log in if you or your colleagues are going to make bookings for them.)

2) Download the template for your file

Download our template. To make uploading easy, we have created a template file. Simply paste your data into that file to be sure it is ready for upload. The template can be [downloaded here](http://beyondjobs.com/data-upload-help-buyers/). (http://beyondjobs.com/data-upload-help-buyers/)

➲ We suggest you make a second copy of the file, that allows you to go back to the first one if there are any mistakes.

Assuming you have the Excel version, not the CSV template, the file now on your desktop looks like this:

name	status	abbreviation	einNumber	onCosts	buyerAgencyMarkup	buyerAgencyFixedMarkup	agencyReferenceNumber	agencyContact	agencyBuyerContract	location.address.line1
ESSENTIAL COLUMN								ESSENTIAL COLUMN		ESSENTIAL COLUMN
Client name	Status	Abbreviated na	EIN numb	On costs	Our mark up (%	Our mark up ($ fixed per	Our reference	Our adviso	Contract versio	Main location (Lin
Martin Simons	NOT YET APPROVED	Martin	900-123456	15	10	1.2	7987124/FF	Mark Smith	4	4811 Airport Plaza Drive
Acme Company	APPROVED	Acme Inc	900-123457	13	11		5563	Mark Smith	New buyer contract	4812 Airport Plaza Drive
Suzy Dent	NOT YET APPROVED		900-123458	17	9	1.2	FGh/43	Mark Smith	Primary buyer contract	4813 Airport Plaza Drive
Thorpe Park Inc.			900-123459		8		PP90-a	Raj Patel	4	4814 Airport Plaza Drive
CashCo Warehousing	NOT YET APPROVED		900-123460	14		1.5		Raj Patel	5	4815 Airport Plaza Drive
ResCare Home Inc.	APPROVED	ResCare	900-123461	22	16	1.2		Raj Patel	2	4816 Airport Plaza Drive
Morton Associates	NOT YET APPROVED		900-123462		17			Lif Cain	New buyer contract	4817 Airport Plaza Drive
Arbiterlum Inc.			900-123463	23	19	1.2		Mark Smith	Primary buyer contract	4818 Airport Plaza Drive
Jones & partners	NOT YET APPROVED		900-123464	24	20	1.2	HH-6	Mark Smith	New buyer contract	4819 Airport Plaza Drive
Morton Sotmlen	APPROVED	Morty	900-123465	25	22		Trial	Sally Vickers	13	4820 Airport Plaza Drive

Understanding this file:

- Ignore the top, yellow, row. These are just the database headings the system will need when you upload.
- The second row is color coded to show essential columns. If a column is green in this row, the system must have an entry in that column to create a record. If a column is red you are free to leave it blank, the system will use a default setting or leave the field empty when it creates the record.
- The gray third row shows the data to go in each column. It uses the labels you see on system screens for creating a new Client.
- We have entered some demonstration data to give you a feel of how each column can be formatted. This text is in blue. It will be deleted before you upload your file. (Don't worry: your data will likely be much simpler than the details we have used. We wanted to show the range of formatting possibilities that are acceptable in each column.)

➲ You may want to leave our demonstration data in place while you enter your data in the rows below. The blue data will show you what sort of formatting you can use in the rows you create.

☑ You should now have a template on your desktop and be ready to enter your data.

3) Populate each column in the template

a) **Paste your data.** Copy each column of data in your current file and paste it into the appropriate column on the template.

☑ It's a good idea to check your columns did not slip out of line with each other during the copy and paste. So, maybe compare the last row of data in the template with the same row in the file that you copied it over from. Are they the same in every column? If so, your data transfer has likely been accurate.

b) **Confirm the essentials.** Check that all the essential columns (the ones colored green in row two) are populated. If you do not have the data required to hand you may want to enter temporary details, for instance using your office address for the location of any Client with no location details. (But the temporary details will need to be overwritten at some point, so it is worth finding as much information as possible before uploading.)

➲ Non-essential columns can be partially populated. Look at your template in the Abbreviated name section (Column C) for example. Some Clients have already been given an abbreviation; the system will generate a shortened version of the name for the others.

c) **Check the formatting of each column is correct.** For example, the name of each Client's advisor (in column "I") must exactly match the way the advisor's name has been entered into the system. (So, if the advisor's name is "Jane Doe", the system will reject "Jan Doe", "Jane doe", "Jane Doe" and other variants.)

➲ Here's further details to help you check formatting in each column before upload.

Column	Heading	Notes	Essential column?	What happens if this column is left blank?
A	Client name	This is the name of the new Client	Yes	Upload will fail
B	Client status	Each Client you upload can be Not Yet Approved or Approved status. If they are Approved, they can make bookings immediately.	Yes	
C	Abbreviated name	You may want to use a shortened name in reports.	No	The system will automatically create a shortened name
D	EIN Number (Employer Identification Number, an official	This has to be 9 digits, formatted as xxx-xxxxxx For example 913-786523	No	The field will be left blank for that Client.

	government record.)			
E	On Costs %	These are the numbers entered on the Manage Client page. They are in the “Controls” section. Do not add % or $ signs when entering a number, just the number.	No	The system will use your agency’s default settings for these numbers
F	Our mark-up (%)		No	
G	Our mark-up ($ fixed per hour)		No	
H	Our reference	This can be any string of numbers and/or letters that your agency uses to identify the Client.	No	The system will create a reference number automatically
I	Our advisor	Each Client must be assigned to one member of your agency’s staff. The name must be written in your file exactly as it appears in the system. To see your list of staff, click Settings > Staff.	Yes	Upload will fail
J	Client Contract	Your agency can have multiple contracts. Each Client must have agreed to one before they are approved. Again, you need to use the exact name of the contract used by the system. To see your list of contracts: Click Settings > Legal: Client contract.	No	If the Client’s status is “Approved”, The most recently added contract for Clients will be added. If the status is “Not Yet Approved”, no contract will be attached to the Client.
K	Main location (Line 1)	This is the primary address for the Client	Yes	Upload will fail
L	Main location (Line 2)			
M	Main location (City)			
N	Main location (State)			
O	Main location (Zipcode)			
P	Name of main location	This is how the address above is to be identified, for example “Main location” or “Home address”	Yes	

Q	First account (Name)	This is the title for the first account this Client will have in the system. For example, “Primary Account” or “Main budget”.	No	The system will give the account a generic name like “Main account”
R	First account (Primary Contact)	This is the name of the person who will be the key point of contact for any issues around billing ➲ If you just want the first name of the primary user here, simply copy the data in Column S across to this column.	Yes	Upload will fail
S	First user (first name)	This is the first person to be authorized to make bookings for the Client. You may be making bookings for the client, so they never need to log in. In that case it doesn’t matter who you enter here.	Yes	
T	First user (second name)		Yes	
U	First user’s email address	This should be the email address for the person above. If they are not going to log in ever, you can use a junk email address such as “gxyfksc@goigcios.com” **NOTE**: Check there are no blank spaces after an email address.	Yes	
V	First user’s phone	Does the person above have a phone number? If so, just enter the 10-digit number with no breaks	No	The field will be left blank
W	First user’s password	You can tell the system what the user’s password is to be be. We don’t recommend this with live data involving real users, but it can be useful for training or demonstration data.	No	The system will create a password randomly, it will then need to be changed if the user is to be allowed to log in.

☑ You should now have all the data you need in the template.

4) Preparing and uploading the file

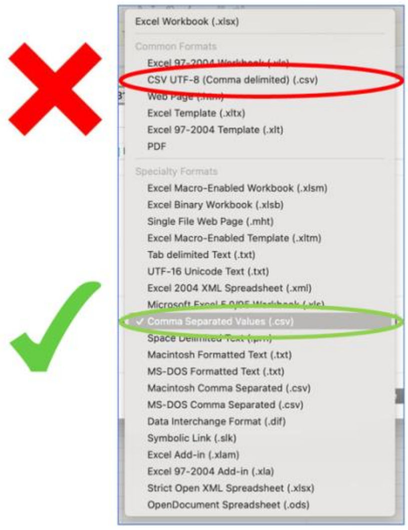
a) **<u>Remove the surplus rows</u>.** To get ready for upload, delete rows 2 and 3 of your template. If you are adding real data delete any demonstration clients. And remove any empty rows above the data you have entered. The template should now just consist of the yellow row at the top in row one, plus all your entries in row two and below.

b) **<u>Split a long file</u>.** The system will take in up to 50 Clients in each upload. If you have more, you need to make copies of the upload file and cut each down until it only has 50 rows. So, if you have 167 Clients to upload, you will end up with four files, three having 50 rows and one having the last 17.

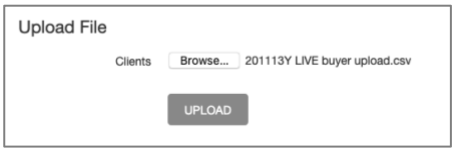
Remember to keep the yellow row at the top of each of the copied files. The system needs this to allocate data to the right database fields.

c) **<u>Ensure the file is saved as a CSV</u>.** You may have been working on an Excel spreadsheet, or other file format, for convenience. In that case, save your file as a CSV (Comma Separated Variables) file. Do this using the "Save As" function on your desktop.

An Excel spreadsheet can be saved as many types of file. There can be more than one version of CSV files on offer. Select the <u>plain</u> "Comma Separated Values".



d) **<u>Upload the CSV file</u>.** On the Upload page, at the bottom, click the Browse button. Find your CSV file on your desktop and click it. The name of your file will appear on the screen:



e) **<u>Click UPLOAD</u>.**

You have now entered your data into the system.

If the system rejects your file it is likely because of some combination of:

- It is not the right kind of CSV file (see above)
- The top row of database headings is missing
- The file has more than 50 rows

- Dates of birth can easily be incorrectly formatted. Each date must be input as mm/dd/yyyy e.g.: 04/20/1997. If you access your CSV file through programs like Excel or Numbers it may change this formatting before you upload it.)
- Your CSV file includes columns that Excel or CSV have populated with some sort of additional content. If that happens you will see a message like this:

If you see this message, there's a simple fix. Open a new spreadsheet on your desktop. Save it with a new name. Do not move your cursor around the sheet. Copy only the rows and columns with content from the earlier sheet and paste into the new one. Save it.

With any of the above issues, correct the problem and repeat the upload process from step 3 above.

5) Confirming the data

➲ You can cancel your upload at anytime by clicking the "Cancel" link at the bottom of the screen. Your data will not be retained in the database.

a) **Look for incorrect data:** You will see a screen displaying your uploaded data. It may have a red banner across the top "*Please make the following correction(s) before proceeding*." This is alerting you to cells in the data that it can't validate.

☒ Reasons for rejecting a particular cell include:

- **Incomplete data**: for example, a phone number missing a digit or an email without the "@" sign.
- **Duplication**: The system already has a user with the email address or phone number entered.
- **Non-compliant**: Each address is checked against the master US addresses list. If the location you are uploading is not on that list it will be rejected as not existing. Check the address on Google Maps (which uses the same database) for the way it is formatted. If that doesn't work, enter a building nearby for now.
- **Failed match**: For example, an advisor's name or a contract title does not exist.

➲ Here are some examples of rejected cells:

Upload Clients Confirm

Use this page to bulk register Alameda Kare Inc. clients

Parsed 10 clients

Please make the following correction(s) before proceeding.

10 Clients found

Client											Billing Address		
Name	Status	Abbreviation	EIN Number	On Costs	Client Agency Markup	Client Agency Fixed Markup	Worker Partnership Subtractive	Agency Contact	Agency Ref	Agency Client Contract	Main Address Name	Line 1	Line 2
Martin Simons	Not yet approved	Martin	900-123456	15.0	10.0	1.2		Dan Fig	7987124/FF	5	Headquarters	4811 Airport Plaza Drive	Suite 100
Acme Company		Acme Inc	900-123457	13.0	11.0	1.2		Dan Fig	5563	5	Headquarters	4812 Airport Plaza Drive	Suite 200
Suzy Dent	Not yet approved		900-123458	17.0	9.0	1.2		Dan Fig	FGh/43	5	Headoffice	4813 Airport Plaza Drive	Suite 300
Thorpe Park Inc.	Approved		900-123459	22.0	8.0	1.2		Dan Fig	PP90-a	5	Headquarters	4814 Airport Plaza Drive	Suite 400
CashCo Warehousing	Not yet approved		900-123460	14.0	19.0	1.5		Dan Fig		8	Headquarters	4815 Airport Plaza Drive	Suite 500
ResCare Home Inc.	Approved	ResCare	900-123461	22.0	16.0	1.2		Dan Fig		5	Headquarters	4816 Airport Plaza Drive	Suite 600
Morton Associates	Not yet approved		900-123462	21.0	17.0	1.2		Dan Fig		5	Headquarters	4817 Airport Plaza Drive	Suite 700

- This agency does not have a contract for Clients with the title “8”.

g ch	California	90815	Priti	Patel	ppatel@fakeemail.com			Primary account	Priti
g ch	California	90815	Lee	Yang	lyang@fakeemail.com	Swimming123		Discretionary spend	Lee
g ch	California	90815	Mark	Salter	msalter@fakeemail.com			Paid in	Mark
g ch	California	90815	Rosie	Cowell	rcowell@fakeemail.com		458669315	Account 1	Rosie
g ch	California	92254	Paul	Dangerfield	pdangerfield@fakeemail.com			Key account	Paul
g ch	California	9081	Simon	Marks	smarks@fakeemail.com			Key account	Simon
g ch	California	90815	Pari	Patel	ppatel@fakeemail.com	Baseball123		Key account	Pari

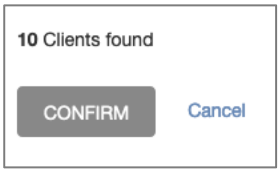
- The same email address has appeared twice on the upload.

b) <u>Correct any cells highlighted in red.</u>

Remember: any details can be changed later. So, if an incomplete address, email, or phone number is given, you can just enter a fictitious one for now and make a note to confirm correct details later.

NOTE: Check there are no blank spaces after an email address.

c) <u>Click CONFIRM at the bottom of the screen.</u>



You have now entered your Clients into the system. Search for any one of them to see their details on your clients page.

If the system rejects the final upload it is likely because an essential column was missing. Insert the essential column into your template and try again.