

# Castrol EVHC Data Entry via FTP

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Please email [support@programs.castrol.com](mailto:support@programs.castrol.com) with any questions

## FTP Upload Option

Integration is a key factor when using EVHC and we can accommodate this facility via an export file from the DMS into a CSV format being sent via FTP to a specific destination on our servers.

Relevant information shown below can be uploaded to the Castrol EVHC servers via FTP at any point in the day or night and we sweep the folders every 5 minutes to capture any new uploads.

We offer two methods of upload,

**A: Overnight upload**, one upload per day normally undertaken in the evening containing all the following days' work booked in. This requires an export from the DMS of all the **following days' work** booked in and exported into a CSV file with the specific data listed in the table below, the upload is then sent to the server via FTP. This upload is the simplest but does not upload any records where a customer walks into the dealer however, a manual process allows for this which takes approximately 30 seconds to enter per customer. We strongly recommend the second method below is undertaken where a lot of walk in customer work is expected.

**B: Ten minute Upload.** This method allows for walk in customers to be added to the EVHC system. Basically, the same data is exported from the DMS into a CSV file and uploaded via FTP every 10 minutes but the data is for the **current days' work**. To make it simple we allow for all the same data to be exported for that day and our process will look at the data already imported and remove any duplicates only adding new records created such as a new walk in customer. We recommend where jobs are booked in for Retail and Warranty you only provide the Retail job and certain internal repair orders for such as parts will not be required to be uploaded, the workshop needs to clarify the requirements to the person creating the FTP and file extract.

*If possible and there is a method where jobs can be removed from the upload that have been previously sent or are now in progress or completed, we would prefer it as it saves additional load on our systems especially if a lot of jobs are being added every 10 minutes.*

We do check and remove duplicate records so both methods will only upload one record per registration in any one day but if the record is sent the following day, it will be uploaded again.

In Summary:

**Method A:** Export a data extract for the following day from DMS to CSV file and FTP once in the evening. No walk in customers accommodated so needs manual input for them.

**Method B:** Export a data extract for the current day from the DMS to CSV file and FTP every 10 minutes or as required. Walk in customers added and no manual intervention.

Both require export from DMS to a CSV file and FTP function which is created by the workshop/IT department or DMS provider.

**Below are the data and details required for both methods:**

The data required for the upload process is detailed below **(use your country locale for dates not those shown)**, **mandatory** data must be provided or the record will not be uploaded, other data can be left blank but this must have "" in the field.

The CSV data should include all fields in the same order as shown below regardless of whether they are populated otherwise the wrong data will be imported into the wrong fields in the database.

Name	Type	Specific Format	Mandatory
Selected Customer Name	Text		Yes
Vehicle	Text		No
Model	Text		No
Registration	Text		Yes
WIP or Work Order Number	Text		Preferred
EVHC Date/Time In	Date Time	DD/MM/YYYY HH:MM	Yes
Vin Number	Text		Preferred
Home Phone	Text		No
Mobile	Text		No
Work Phone	Text		No
Email	Text		No
Fax	Text		Leave Blank ""
Sales Advisor (if allocated)	Text		Leave Blank ""
Mileage	Numeric		No
Date Vehicle 1 <sup>st</sup> Registered	Date	DD/MM/YYYY	No
Contact Phone (on the day)	Text		No
Car Date/Time Due Out	Date Time	DD/MM/YYYY HH:MM	No
Customer Waiting	Boolean	1 or 0 (0 = No)	No

The data should be uploaded in CSV format. All fields must be surrounded by double quotes " ", " ", and commas used as a separator between fields.

The first CSV file needs to be sent to support@programs.castrol.com where we will check and ask for any corrections or will create the relevant folders for the FTP upload and then send you the Username & Password for testing a live FTP.

The FTP address we use is:

ftp://evhcfp.castrolprofessional.com

Each upload of data is sent to its own folder as it is specific to the one workshop.

**A typical example of CSV data for one record would be:**

```
"Mr Smith","Volkswagen","Golf 2,0L TDI 180HK","A1 REG","Repair Order1","29/12/2016  
09:15","WVWXXX5PZCE104196","","078801234456","","support@programs.castrol.com"  
","","","01202333444","29/12/2016 17:00","0"
```

Remember "" (double quotes) must surround all fields and , (commas) should be used to separate fields and records. Data is only required where marked in the table as mandatory otherwise it can be left blank but surrounded by ""

We do not need the header descriptions in the CSV file.