Additional Account Fields Automation

1. File Naming Convention

- To ensure successful processing, the submitted file must follow the specific naming format:
- **Format**:
  - ICRM Additional Account Fields_MM.DD.YY.csv
  - DCRM Additional Account Fields_MM.DD.YY.csv

2. File Format Requirements

- **File Type**: Excel (.csv)
- **Encoding**: UTF-8
- **Header Row**: Required (Column headers must be included in the first row)
- **Column Names - ICRM:**
  - BAC Code
  - Parent BAC
  - Parent Account
  - PDN
  - Account DBA Name
  - Account ID
  - Dealer Group Code
  - Dealer Group Name
  - Dealer Status
  - Garage Package
  - Garage Current Provider
  - F&I Relationship
  - F&I Dir of Sales
  - Region Description
  - UniqueAccountId
  - SLP
  - Primary VSC Provider
  - Floorplan
  - AF Retail
  - VSC Vol. (3mo)
  - GAP Vol. (3mo)
  - OtherFI Vol. (3mo)
  - Product Density (3mo)
  - 31 Day Avg. Vol
  - Cur. 31 Day Vol
  - % Diff. Call Reports

- o Most Recent Call Date
- o SLC Report
- o Most Recent SLC Date
- o Product Density
- o Floorplan Lost
- o Paid Off Cash Advance
- o Incentive
- o Reinsurance
- o Risk Score
- **Column Names - DCRM:**
    - o OE ID
    - o Account Name
    - o Account ID
    - o Parent Account
    - o Group Id
    - o Dealer Status
    - o Group Name
    - o Privilege(s)
    - o Sub Privilege(s)
    - o UniqueAccountID
- **Validate all dates are formatted**: YYYY-MM-DD
- **Validate all times are formatted** (if applicable): HH:MM:SS (24-hour format)
- **Special Characters**: Avoid special characters such as quotes (`"`), commas within fields (unless properly escaped), and line breaks within fields.

3. File Upload Instructions
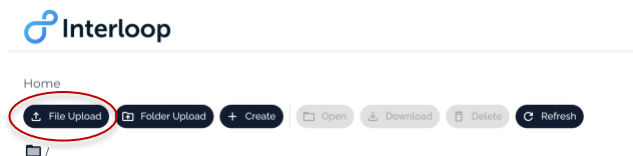
- Go to URL: https://upload.interloopdata.com
- **Credentials:**
    - o Username: mythic
    - o Password: contact your admin
- Click "File Upload" button to upload necessary file(s).

4. Processing and Trigger Information

- Trigger Mechanism:

- The pipeline runs every night at 10pm EST. If both files are present, then the automation will run.
  - Only files following the correct naming convention will be processed.
- Error Handling:
  - Files that do not meet the file naming convention will not be processed.
    - Files that meet file naming convention but do not meet other format specifications will be processed but not be successful.
  - Interloop captures error handling internally and will inform client on unsuccessful runs.

5. Data Destination

- Successfully processed data will be integrated into HubSpot.
- The integration process runs immediately after file processing is complete.
- Clients can verify successful uploads through their HubSpot instance.
- Email notifying start of sync and completion of sync will be sent to:
  - tchamberland@mythic.us
  - jkinlaw@mythic.us
  - mdowning@mythic.us

6. Contact Information

- For any issues, questions, or access requests, please reach out to:
  - Support Email: support@interloopdata.com
  - Business Hours: M-F 9am-5pm EST