

## ARCOS IQ Active Customer File Format

#### **Active Customer File Format Guideline:**

1. Please open the "active\_customer\_MMYY\_template.csv."

Α	В	С	D	E	F
Subscriber Name	Retail Buyer Name	Retail Buyer DEA	Retail Buyer City	Retail Buyer State	Retail Buyer Zip
Demo	RYE BEACH PHARMACY INC	AR1868845	RYE	NY	10580

- 2. Use the sample data as a guide but replace it with actual active customer data from your company. Include only active customers.
  - a. Subscriber Name: ARCOS IQ customer company name
  - b. Retail Buyer Name: Full retail buyer name as listed in ARCOS
  - c. Retail Buyer DEA: DEA number as listed in ARCOS
  - d. Retail Buyer City: Full city name
  - e. Retail Buyer State: Two-letter state abbreviation (e.g. NY, CA)
  - f. Retail Buyer Zip: 5-digit ZIP code
- 3. Save the file using the following format:

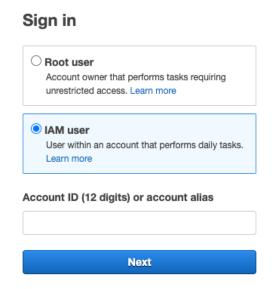
active customer MMYY.csv (e.g., active customer 0724.csv)

- ⚠ Make sure the date format is correct, or the file will not load properly.
- 4. Follow the steps in the "ARCOS IQ Active Customer Upload Guide" to upload the completed file.

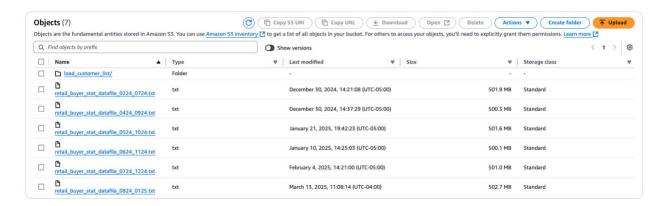
## ARCOS IQ Active Customer Upload Guide

### **Instructions to Upload the Active Customer File to AWS:**

 Navigate to the same AWS link you used previously for uploading retail\_buyer\_stat data:



- 2. Click IAM User and Enter the Account ID 315603563881
- 3. Enter the credentials sent via email during onboarding



Click on the folder named "load\_customer\_list" (see screenshot above for reference)

- 6. Click the "Upload" button in the top right corner
- 7. Click "Add Files" and select the completed file from your computer
- 8. Save the file using the following format:

```
active_customer_MMYY.csv (e.g., active_customer_0724.csv)
```

⚠ Make sure the date format is correct, or the file will not load properly.

#### File Upload Convention:

```
File Format:
```

```
active_customer + "_" + Starting Date + "." + csv
```

Starting Date: MMYY

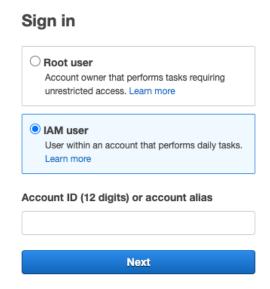
i.e.) active\_customer\_0724.csv

- 7. Click "Upload"
- 8. After uploading the file, follow the "ARCOS IQ Retail Buyer Data Upload Guide" to complete the retail buyer data upload process

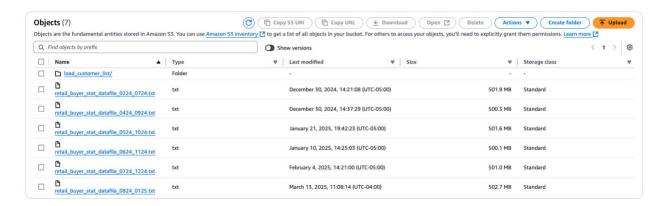
# ARCOS IQ Retail Buyer Data Upload Guide

### Instructions to Upload the Retail Buyer File to AWS:

1. Please use the link provided to access AWS and upload the retail\_buyer\_stat data:



- 4. Click IAM User and Enter the Account ID 315603563881
- 5. Enter the credentials sent via email during onboarding
- 6. Click the "Upload" button in the top right corner



- 4. Click "Add Files" and select the completed file from your computer
- 5. Save the file using the following format:

retail\_buyer\_stat\_datafile\_MMYY\_MMYY.txt

- First date = Start date (MMYY)
- Second date = End date (MMYY)
- Example: retail\_buyer\_stat\_datafile\_0224\_0724.txt

⚠ If the filename format is incorrect, the data will not load.

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#### **File Upload Convention:**

File Format:

File Name + "\_" + Starting Date + "\_" + End Date + "." + txt

File Name: retail\_buyer\_stat\_datafile

Starting Date: MMYY

End Date: MMYY

i.e.) retail\_buyer\_stat\_datafile\_0324\_0824.txt

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- 9. Click "Upload" to submit the file
- 10. After the upload, please wait 8-10 minutes before logging into the Looker dashboard.
- 11. Log into your Production Looker Dashboard

#### **ARCOS IQ Dashboard**

- 12. If the new date range is not loaded after 2 minutes, click "Clear cache and refresh." The new data file should be loaded afterward.
- 13. If you still can't locate the new date range in the "File Date Range" filter, please contact <a href="mailto:support@cssolutionsusa.com">support@cssolutionsusa.com</a> for assistance or any additional questions.