

Data Collection

Applied TAM – How to run your monthly upload report once set up

- At Main Menu, click on Reports, then click on Searches on the list of icons.
- Select Search – Customers from the Report Type and then Transactions – Customers from the Report Choices
- All the field headings and criteria will still be selected from the first time this was set up, so no need to change any of that
- Select Excel Raw Data from the output destination
- Press Run in the top left-hand side of the screen
- Select Send Output to a Temporary File and click OK to load the Excel document
- Please save the file as a CSV (Comma delimited) file
- And now it's just a case of logging into the Broker Insights platform <https://brokerinsights.com/>
- Once logged in, click on Actions on the left-hand side of the screen and then Data Upload. Click Browse, select the CSV file from wherever you have saved it and upload. You should see a Green Successful Upload message and the job is done!

Applied TAM Monthly Upload Instructions 05/03/24