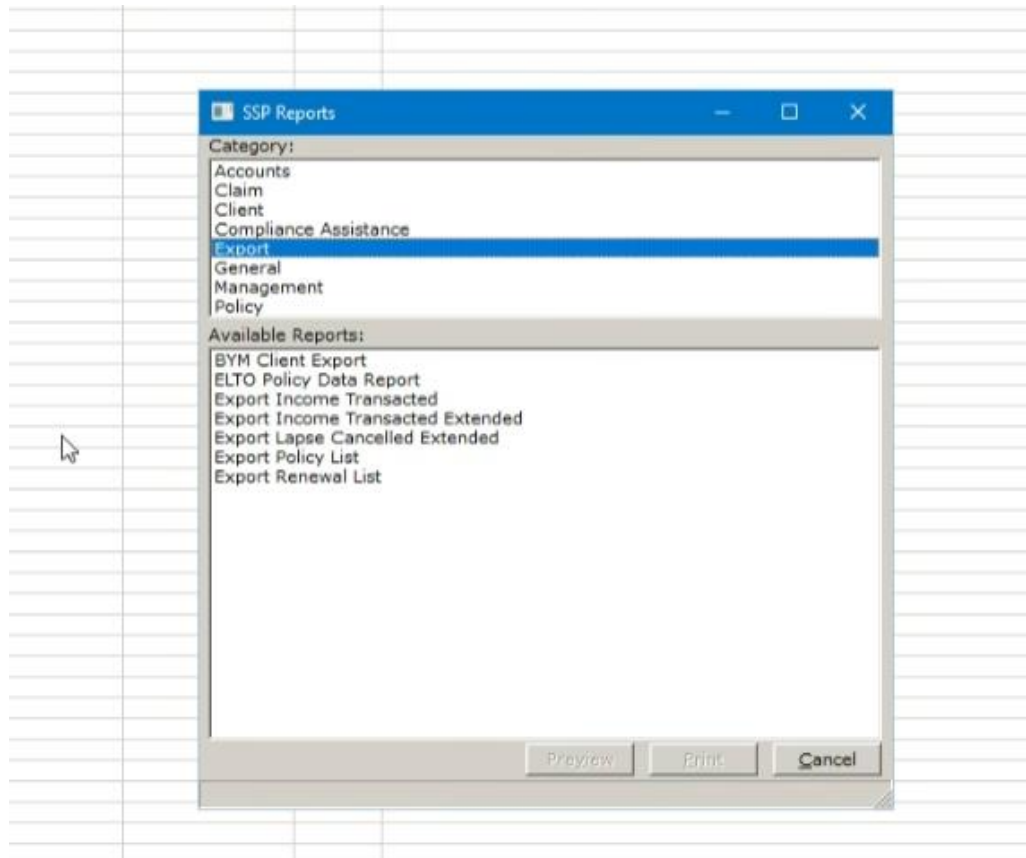


Data Collection

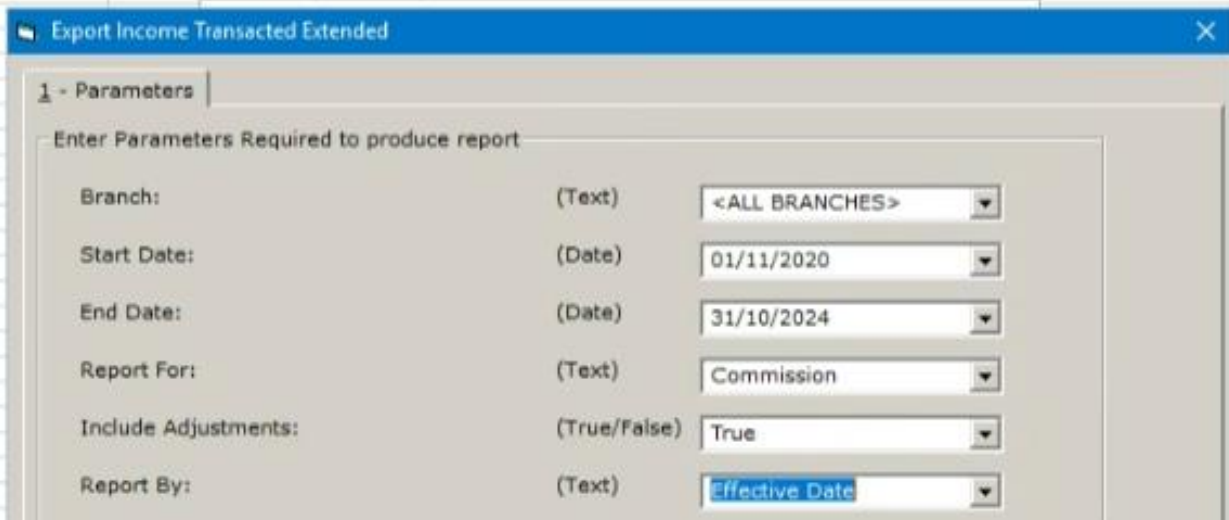
SSP Pure – How to run your monthly upload report once set up

- Open up SSP and select reports on the left hand side, you will then see the following pop up box appear



- From 'Category', select 'Export'
- From 'Available Reports', select 'Export Income Transacted Extended'
- Using the below image, ensure that the Branch, Report for, Include Adjustments and Report By are all matching

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- For the Start Date and End Date please do a rolling 12 month report. For example if you are running the report at the start of February 2024, the dates should be 01/01/2024 to 31/12/2024

(Then running the report at the start of March 2024 would be 01/02/2024 to 31/01/2025, so on and so forth... just move the month forward once each time.)

- Click ok and then once the report has been generated, click on the envelope icon at the top of the screen to export
- Select 'Excel 7.0 (XLS)' from the Format dropdown and select 'Disk File' from the Destination
- Click ok and save this file
- Find where the file was saved and open up the spreadsheet
- Delete the first 9 rows of the file, as these shouldn't be in the report. All the column headers should now be in Row 1
- 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" message come up and the job is done!

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