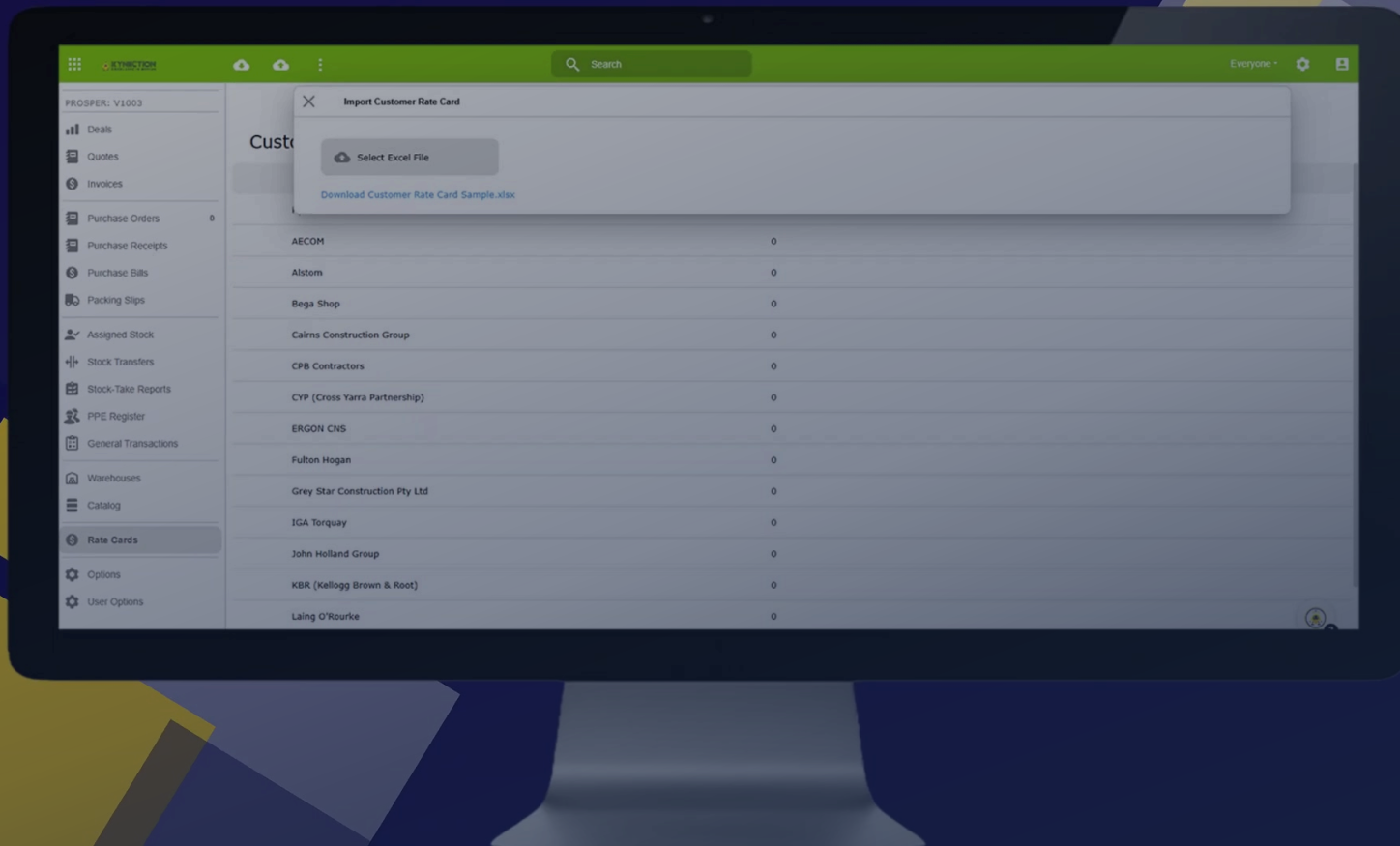




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • KIM WELCOME • PART 4

Import Data and Submit *a Support Request*

Importing a customer rate card safely, reading the validation errors when it does not go to plan, and getting help from the knowledge base or a support request.

3 CHAPTERS

2 MIN 3 SEC

KIM WELCOME

WEB USERS • MANAGERS

FEATURE GUIDE • 2 MIN 3 SEC

What this feature covers

Three stages, six steps: testing and running the import, reading errors, then reaching support.

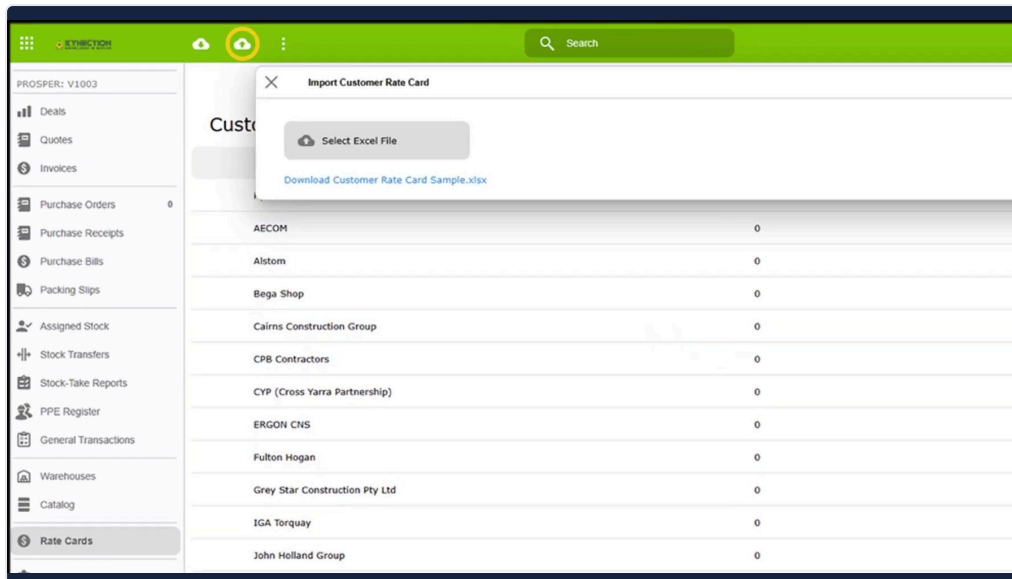
CH 01	Run the import Sample first, then the whole file.	00:00–00:29
CH 02	Read the errors A failed import tells you what to fix.	00:29–00:58
CH 03	Get support The knowledge base first, a request if that does not answer it.	00:58–02:03

- **Test with a sample.** Import a handful of rows, confirm they are right, then run the full file. It is far cheaper than unpicking a bad import.
- **Errors are per row.** Validation reports what failed and why, so the file can be corrected and re-run.
- **Refresh before submitting.** Refresh your browser before submitting a support request, or the form can fail to send.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Run the import

Sample first, then the whole file.

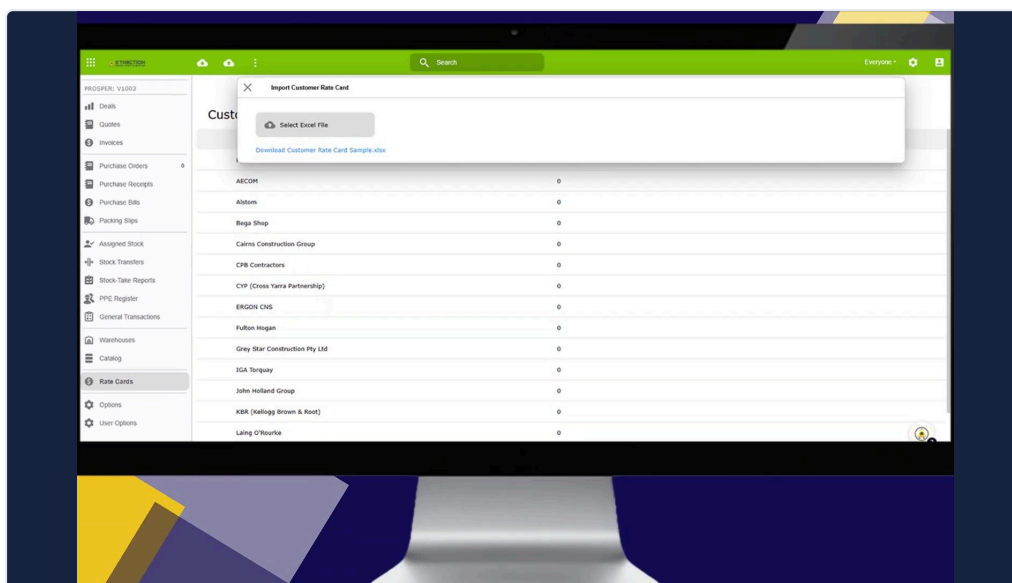


STEP 1 • 00:02 IN THE VIDEO

Start the import

The customer rate card import begins from the data screen.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:23 IN THE VIDEO

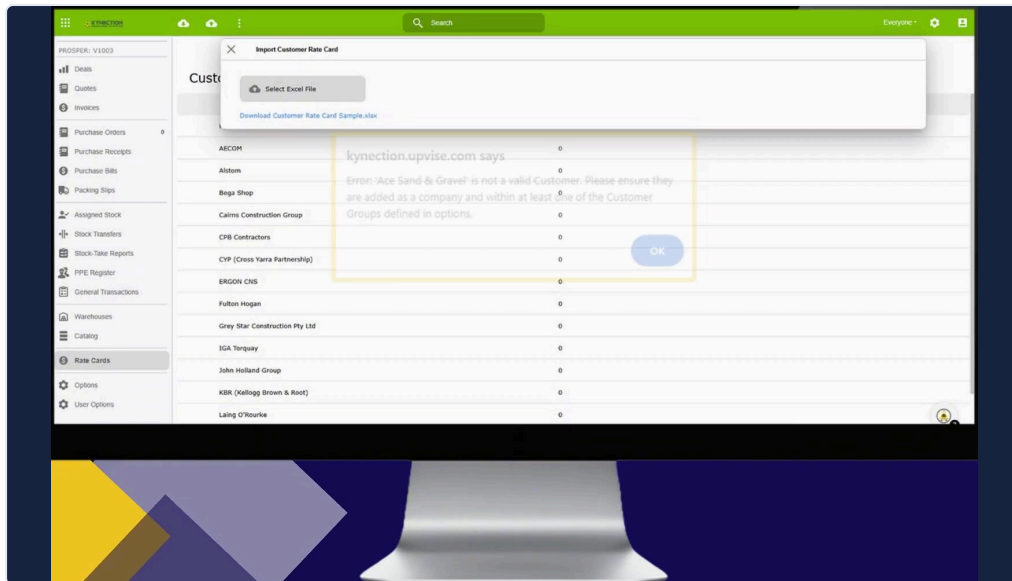
Test a small sample

Import a handful of rows first and confirm they landed correctly before proceeding.

CHAPTER 01 • STEP 2 OF 2

Read the errors

A failed import tells you what to fix.



STEP 1 • 00:42 IN THE VIDEO

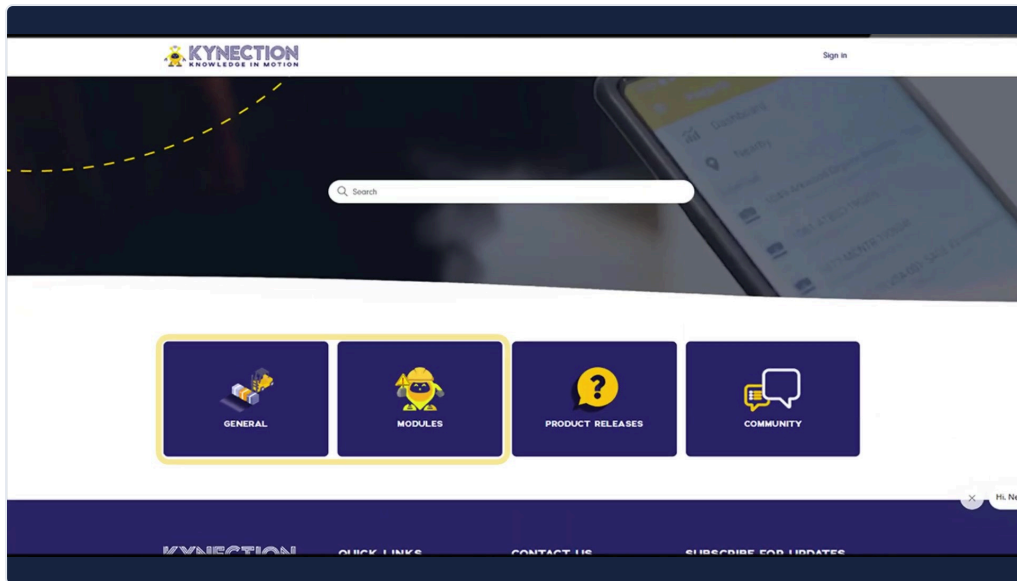
Review validation errors

Errors are reported per row with the reason, so the file can be corrected and re-run rather than abandoned.

CHAPTER 02 • STEP 1 OF 1

Get support

The knowledge base first, a request if that does not answer it.

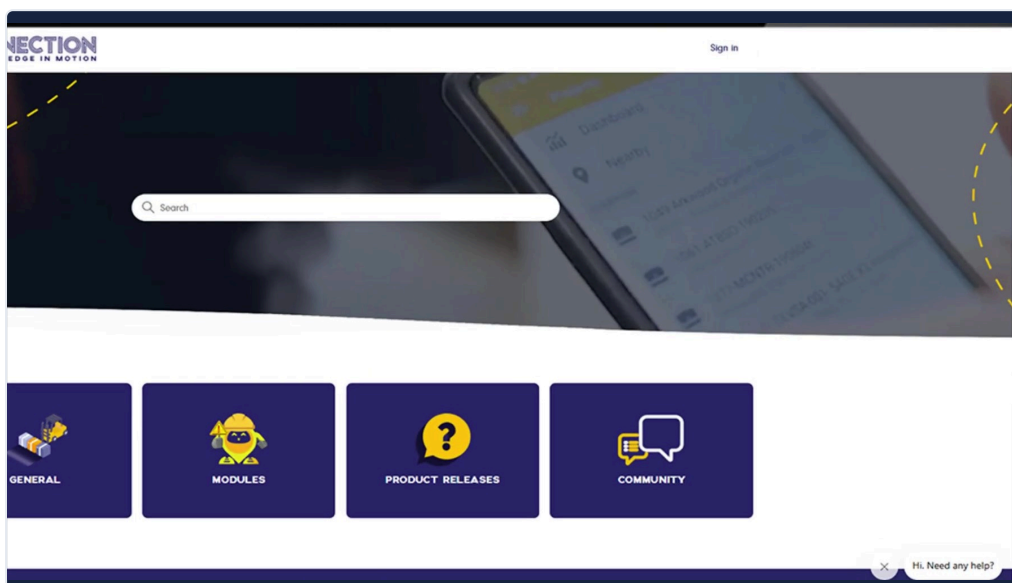


STEP 1 • 00:58 IN THE VIDEO

Open Kynection support

Support is reachable from within the product.

CHAPTER 03 • STEP 1 OF 3



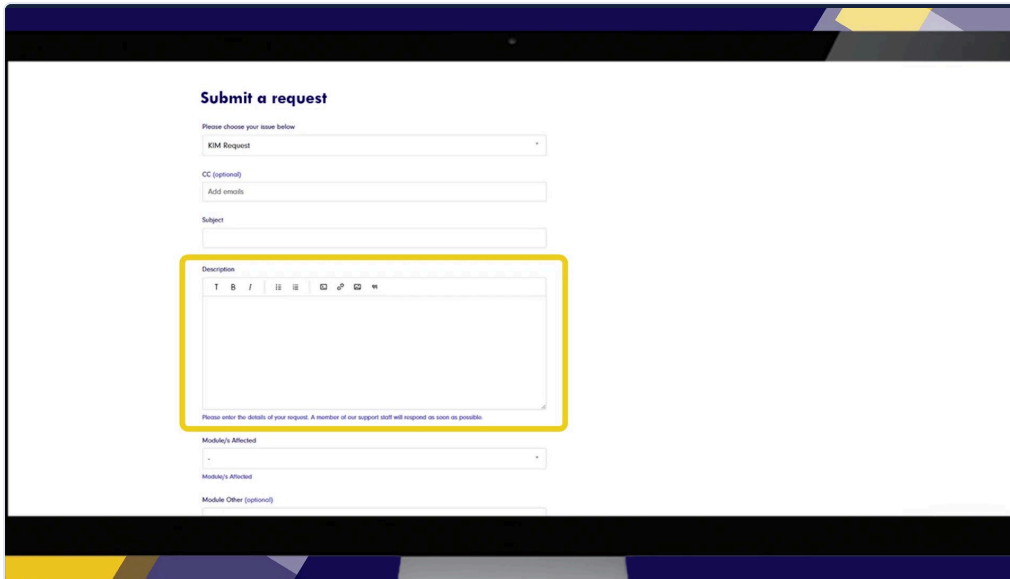
STEP 2 • 01:15 IN THE VIDEO

Search the knowledge base

The knowledge base answers most questions without raising a ticket.

CHAPTER 03 • STEP 2 OF 3

Get support



The screenshot shows a web form titled "Submit a request". The form includes the following fields: "Please choose your issue below" (a dropdown menu with "KIM Request" selected), "CC (optional)" (a text input field with "Add emails" as a placeholder), "Subject" (a text input field), "Description" (a rich text editor with a yellow border and a toolbar containing icons for bold, italic, link, unlink, image, video, and list), and "Module(s) Affected" (a dropdown menu with "-" selected). Below the "Module(s) Affected" field is a "Module Other (optional)" text input field. A small note at the bottom of the form states: "Please enter the details of your request. A member of our support staff will respond as soon as possible."

STEP 3 • 01:38 IN THE VIDEO

Submit a request

A support request is submitted with the detail of what went wrong. Refresh your browser before submitting.

CHAPTER 03 • STEP 3 OF 3

NEXT

Where to go next

This guide covers one part of the module. The rest of the series covers it end to end.

BACK TO KIM 03

Manage forms, records and data exports

THE REST OF THE KIM SERIES

Ask your Kynection account manager for the other guides in this series

MORE IN THIS MODULE

KIM 01 Use Kynection as a manager user (module overview)

KIM 02 Navigate access, contacts and forms

KIM 03 Manage forms, records and data exports
