



KitchenCare Claims Processing System

Multiple Claim Upload Instructions

Last updated February 21, 2019



What is Multiple Claim Upload Functionality?

Multiple Claim Upload functionality in the KitchenCare Claims Processing system gives users the opportunity to create several claims with a few clicks of the mouse. For users with your own internal claims system, you can now format a download of data from your system to upload into the CPS. The format is pre-defined and available within the application. Please utilize this functionality to your advantage to gain efficiencies.

CPS Multiple Claim Upload - Introduction

- Upload file format must be CSV
- No more than 90 claims may be uploaded at a time
- Line breaks need to be removed from the file in order to upload
- All date formats must be in dd/mm/yyyy
- Reference the field requirements document for fields that are required, field formats and values for drop down fields
 - Populate the currency on the upload document that your account is setup in (contact your local claims processor or system administrator if needed)
- Claims are loaded 6 times a day at the following Eastern Standard Times: 12am, 4am, 8am, 12pm, 4pm and 8pm
- If a required field is missing or not populated, an error file will be emailed to the user that uploaded the file and the errored claim record will be put into Draft status
- If you close a CSV and re-open it, leading zero's will be stripped from values that are strictly numerical
 - Functionality is built in to handle part numbers with leading zeros, so no action is needed from you for this scenario
 - There is not functionality in place to handle leading zeros for Zip/Postal codes
 - If you close and re-open a CSV file with Serial Numbers or Zip/Postal Codes that have leading zeros, you will need to add the zeros back in order for these fields to be uploaded correctly

Clearing Line Breaks in the CSV file

If there are line breaks in any cells in the file, you will receive an error and it will not be uploaded.

To remove line breaks in Excel:

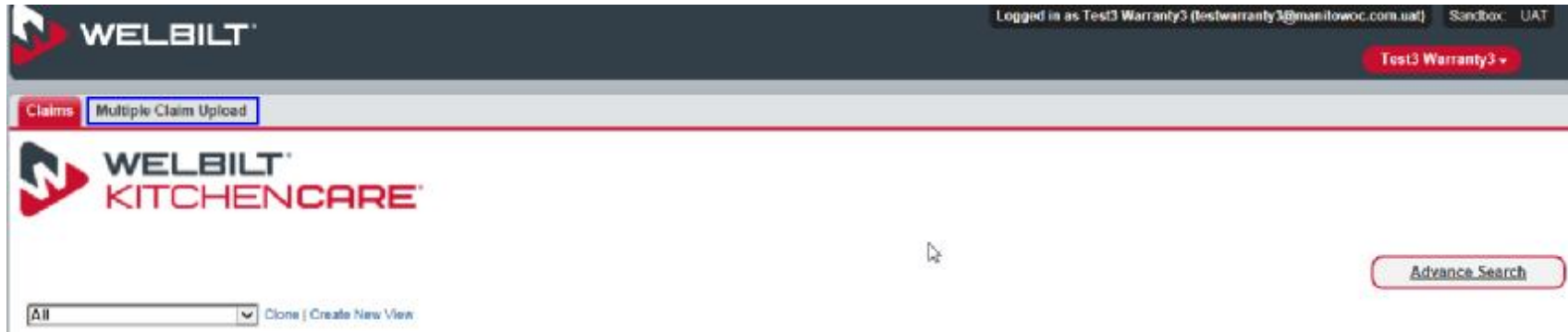
- Use the CTRL + F function for “Find”
- Click on the “Replace” tab
- In the “Find What” text box, click on CTRL +J and you will see a blinking decimal
- Leave “Replace With” blank
- Click “Replace All” and Enter
- A message will display if there were any line breaks removed
- Save your CSV file

The screenshot shows a Microsoft Excel spreadsheet with columns A through E. The data includes Claim Type, Claim Status, Authorization Number, Authorization by, and Submitter Invoice Number. A 'Find and Replace' dialog box is open, with the 'Find what' field containing a decimal point (.) and the 'Replace with' field empty. The 'Find Next' button is highlighted. A 'Microsoft Excel' message box is also visible, stating 'All done. We made 6 replacements.' and has an 'OK' button.

	A	B	C	D	E
1	Claim Type	Claim Status	Authorization Number	Authorization by	Submitter Invoice Number
2	STANDARD WARRANTY		INBUPMC180808088		INBUPMC180808088
3	STANDARD WARRANTY		INBTNMC180725305		INBTNMC180725305
4	STANDARD WARRANTY		INBKAMC180903026		INBKAMC180903026
5	STANDARD WARRANTY				0928364
6	STANDARD WARRANTY				108076
7	STANDARD WARRANTY				025306
8	STANDARD WARRANTY				18204
9	STANDARD WARRANTY				709117
10					
11					
12					
13					

CPS Multiple Claim Upload

Click on the Multiple Claim Upload tab after signing in



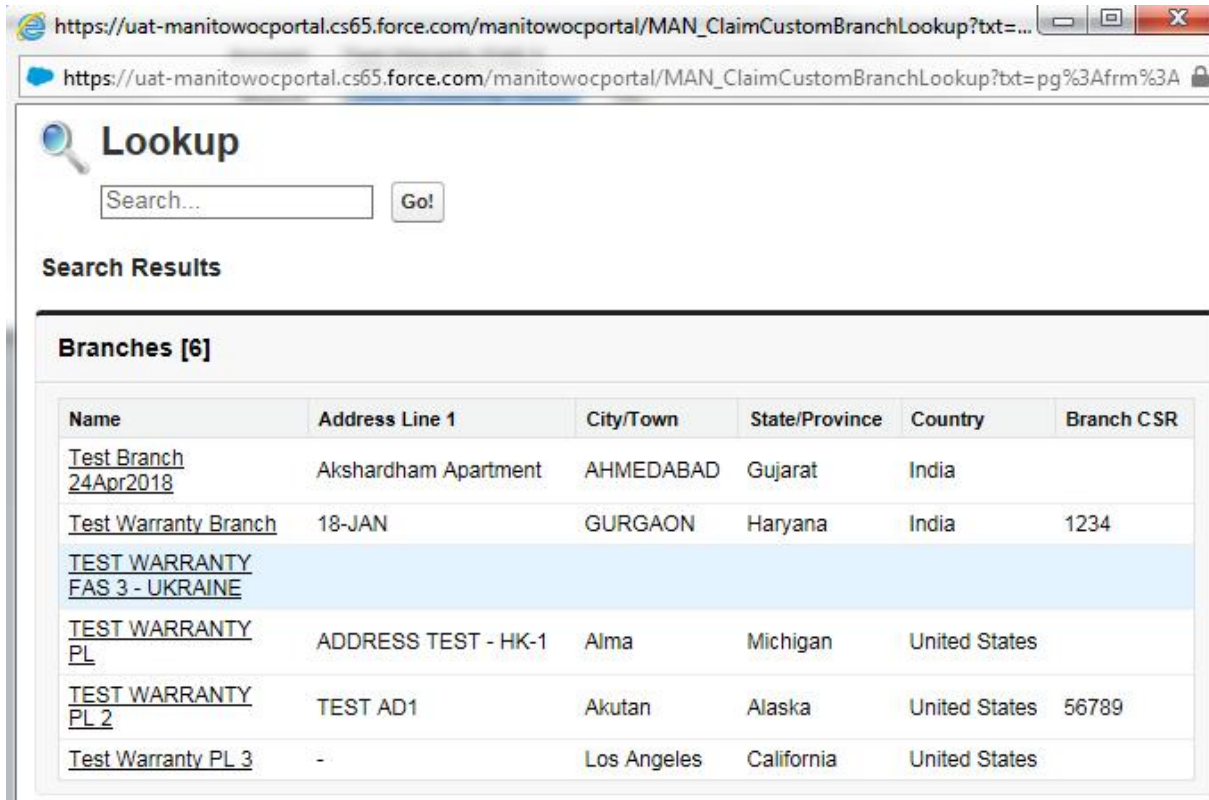
Your account will default based on your user login



Account	Test Warranty FAS 3
Branch	Test Warranty Branch <input type="text"/> <input type="button" value="x"/> <input type="button" value="🔍"/>
<input type="button" value="Next"/> <input type="button" value="Cancel"/>	

CPS Multiple Claim Upload

If you need to change the branch, click on the lookup icon and select the branch



The screenshot shows a web browser window with the URL https://uat-manitowocportal.cs65.force.com/manitowocportal/MAN_ClaimCustomBranchLookup?txt=pg%3Afrm%3A. The page title is "Lookup" and it features a search bar with the text "Search..." and a "Go!" button. Below the search bar, the section "Search Results" is displayed, containing a table titled "Branches [6]".

Name	Address Line 1	City/Town	State/Province	Country	Branch CSR
Test Branch 24Apr2018	Akshardham Apartment	AHMEDABAD	Gujarat	India	
Test Warranty Branch	18-JAN	GURGAON	Haryana	India	1234
TEST WARRANTY FAS 3 - UKRAINE					
TEST WARRANTY PL	ADDRESS TEST - HK-1	Alma	Michigan	United States	
TEST WARRANTY PL 2	TEST AD1	Akutan	Alaska	United States	56789
Test Warranty PL 3	-	Los Angeles	California	United States	

CPS Multiple Claim Upload

Download the sample CSV for the format, if not already saved

- Delete the sample data and leave the column headers
- Make sure to save as a CSV file



Account	<u>Test Warranty FAS 3</u>	Branch	<u>TEST WARRANTY PL</u>
Upload Multiple Claim Download Sample CSV Back Cancel			

CPS Multiple Claim Upload

Reference the “KitchenCare CPS Multiple Claim Upload Field Requirements” document for required fields, field formats and picklist values

- Please note, this is not the upload file. The CSV file runs left to right, not up and down.
- Note for Manitowoc Ice Claims Only: For “Failure Mode” population on your file, please ensure to use the Failures -Manitowoc Ice list in the field requirement document on the picklist tab
- “Charge Line” reflects the total number of charge lines on the claim and each charge needs to be entered on a separate charge line. *For example:* If you have 2 labor charges, 1 part charge and 1 other charge, then you will have 4 “Charge Lines” on the claim. Each charge line number field, such as Charge Line 1 or Charge Line 2, can only be populated with EITHER a Labor, Parts or Other charge type, not all three.

Charge Line 1 SIL #
Charge Line 1 Labor/Travel Type
Charge Line 1 Labor/Travel Description
Charge Line 1 Labor/Travel UOM
Charge Line 1 Labor/Travel Requested Qty
Charge Line 1 Labor/Travel Requested Rate/Charge
Charge Line 1 Labor/Travel Total Requested
Charge Line 1 Parts Replacement Part #
Charge Line 1 Parts Replacement Part Description
Charge Line 1 Parts Replacement Part S/N
Charge Line 1 Parts RMA Tag #
Charge Line 1 Parts Replacement Part UOM
Charge Line 1 Parts Requested Qty
Charge Line 1 Parts Requested Part Price
Charge Line 1 Parts Total Requested
Charge Line 1 Other Type
Charge Line 1 Other Description
Charge Line 1 Other Refrigerent
Charge Line 1 Other UOM
Charge Line 1 Other Requested Qty
Charge Line 1 Other Requested Rate/Charge
Charge Line 1 Other Total Requested

CPS Multiple Claim Upload

- Save your file in CSV format
- When the file is ready to be uploaded, click Browse and select the file to upload from your local network
- Click Upload File

Claims Multiple Claim Upload



Account Test Warranty FAS 3 Branch TEST WARRANTY PL

[Upload Multiple Claims](#) [Download Sample CSV](#) [Field Requirements Doc](#) [Back](#) [Cancel](#)

Upload Document for Multiple Claims upload: [Browse...](#) [Upload File](#)

File Upload Reminder:

- Remove all line breaks in your file
- Format all dates as dd/mm/yyyy or dd-mmm-yyyy
- Do not load more than 90 lines (claims) per file

CPS Multiple Claim Upload

A message will display that the records were successfully staged to be loaded when the next job runs to create the claims


Note: If you receive an error that the file could not be uploaded, confirm all of your dates are in the correct format of dd/mm/yyyy




The screenshot displays the 'Multiple Claim Upload' page in the Welbilt system. At the top, the breadcrumb 'Claims > Multiple Claim Upload' is visible. The Welbilt logo and tagline 'Bringing innovation to the table' are centered. A yellow notification bar at the top left states 'Claim Staging records inserted successfully'. Below this, the 'Account' is 'Test Warranty FAS.3' and the 'Branch' is 'TEST WARRANTY FL'. A row of five red buttons is present: 'Upload Multiple Claim', 'Download Sample CSV', 'Field Requirements Doc', 'Back', and 'Cancel'. The 'Upload Document for Multiple Claims upload:' section includes a 'Browse...' button and an 'Upload File' button. A 'File Upload Reminder' section lists three instructions: 'Remove all line breaks in your file', 'Format all dates as dd/mm/yyyy or dd-mmm-yyyy', and 'Do not load more than 90 lines (claims) per file'.

CPS Multiple Claim Upload

- If a required field is missing or not populated correctly, an error file will be emailed to the user that uploaded the file with a reason for the error in the last populated column (LF)
- Claim records with no errors will be created and put into Submitted status


SM Salesforce Multiple Claim Upload Admin <kc-fsg-administration@welbilt.com>
 Multiple Claims Upload Error

To  KC-FSG-Administration


 Multiple Claim Upload Error File.csv
 12 KB

Please find the attached error file containing claim records that have errors.

Thanks,

Welbilt KitchenCare

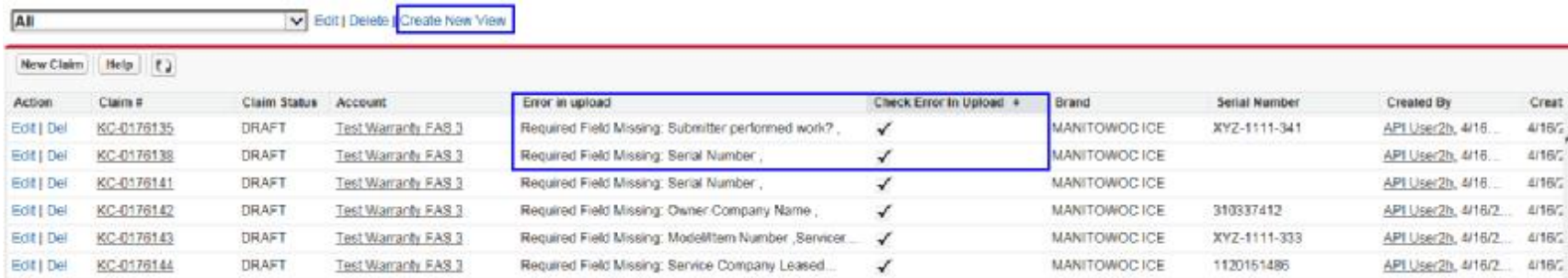
LF	LG
Error in upload	
Required Field Missing: Charge Line 1 Labor/Travel Type	
Required Field Missing: Servicer Company Name ,Servicer Address 1 ,Servicer State/Province ,Servicer Country ,Servicer Phone ,Servicer City/Town	

CPS Multiple Claim Upload

Errored claim record(s) will be put into Draft status. You can Create New View to include Error in Upload or Check Error in Upload fields to see errored claims

To correct the error(s):

- You can either go into the Draft claim(s) in the system, correct the issue and submit the claim(s)
- Or correct the error(s) in the error file in the applicable line/column, save the file in a CSV format and upload it
- If the corrected file does not produce any further errors, the Draft claim will be put into Submitted status based on a match to the following fields: Brand, Serial Number, Repair Completed Date and Grand Total Requested
- If any of the above fields caused an error originally, the Draft claim will not be updated to Submitted, but a new claim will be created and put into Submitted status



Action	Claims #	Claim Status	Account	Error in upload	Check Error In Upload *	Brand	Serial Number	Created By	Create
Edit Del	KC-0176135	DRAFT	Test Warranty FAS 3	Required Field Missing: Submitter performed work?	✓	MANITOWOC ICE	XYZ-1111-341	API User2b, 4/16/2...	4/16/2...
Edit Del	KC-0176138	DRAFT	Test Warranty FAS 3	Required Field Missing: Serial Number ,	✓	MANITOWOC ICE		API User2b, 4/16/2...	4/16/2...
Edit Del	KC-0176141	DRAFT	Test Warranty FAS 3	Required Field Missing: Serial Number ,	✓	MANITOWOC ICE		API User2b, 4/16/2...	4/16/2...
Edit Del	KC-0176142	DRAFT	Test Warranty FAS 3	Required Field Missing: Owner Company Name ,	✓	MANITOWOC ICE	310337412	API User2b, 4/16/2...	4/16/2...
Edit Del	KC-0176143	DRAFT	Test Warranty FAS 3	Required Field Missing: Model/Item Number , Servicer...	✓	MANITOWOC ICE	XYZ-1111-333	API User2b, 4/16/2...	4/16/2...
Edit Del	KC-0176144	DRAFT	Test Warranty FAS 3	Required Field Missing: Service Company Leased...	✓	MANITOWOC ICE	1120151485	API User2b, 4/16/2...	4/16/2...