

## Index

- 1. How it Works**
  - a. Customer Import CSV
  - b. Lift Import CSV
  - c. AMC Import CSV
- 2. How to save CSV file**
- 3. What you need to keep in mind while importing CSV file?**

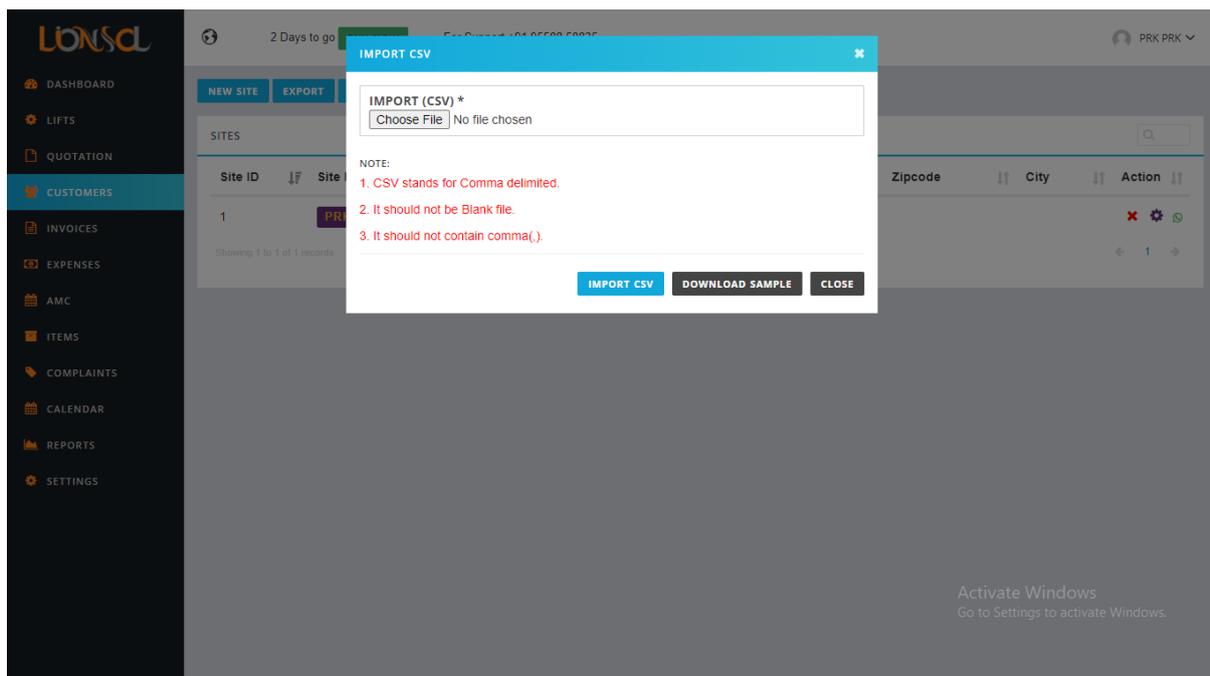
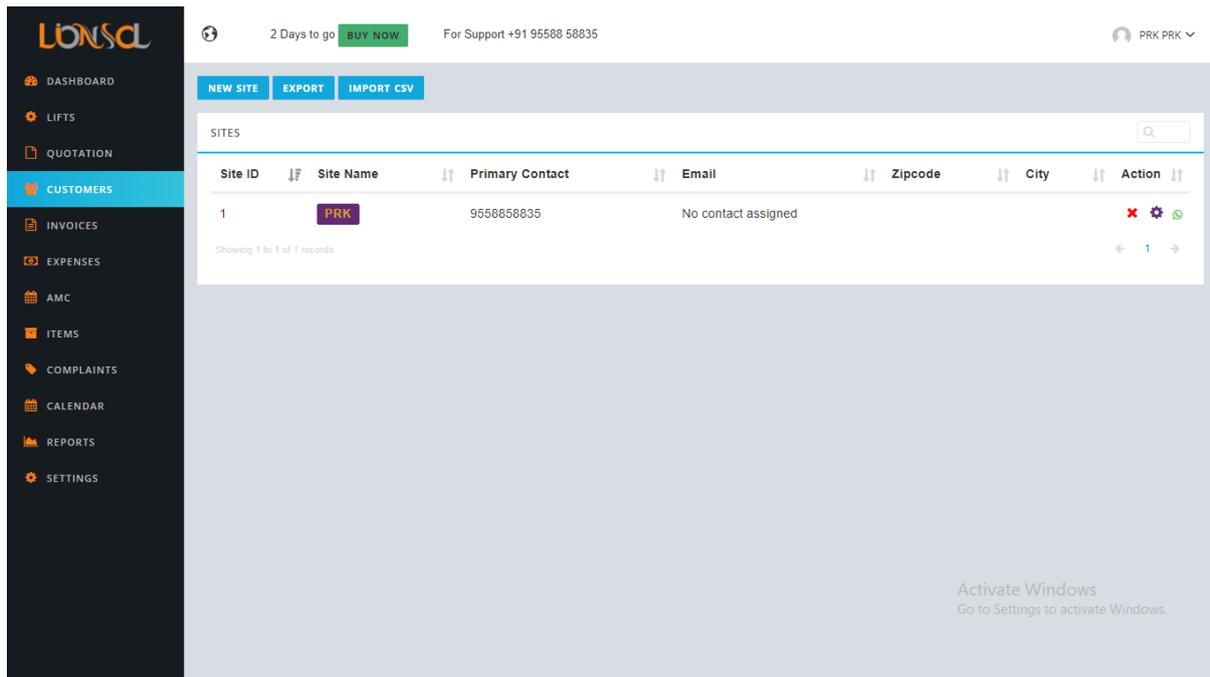
# How It Works

Let's start, how it works with import CSV. First Login to your Elevato AMC account.

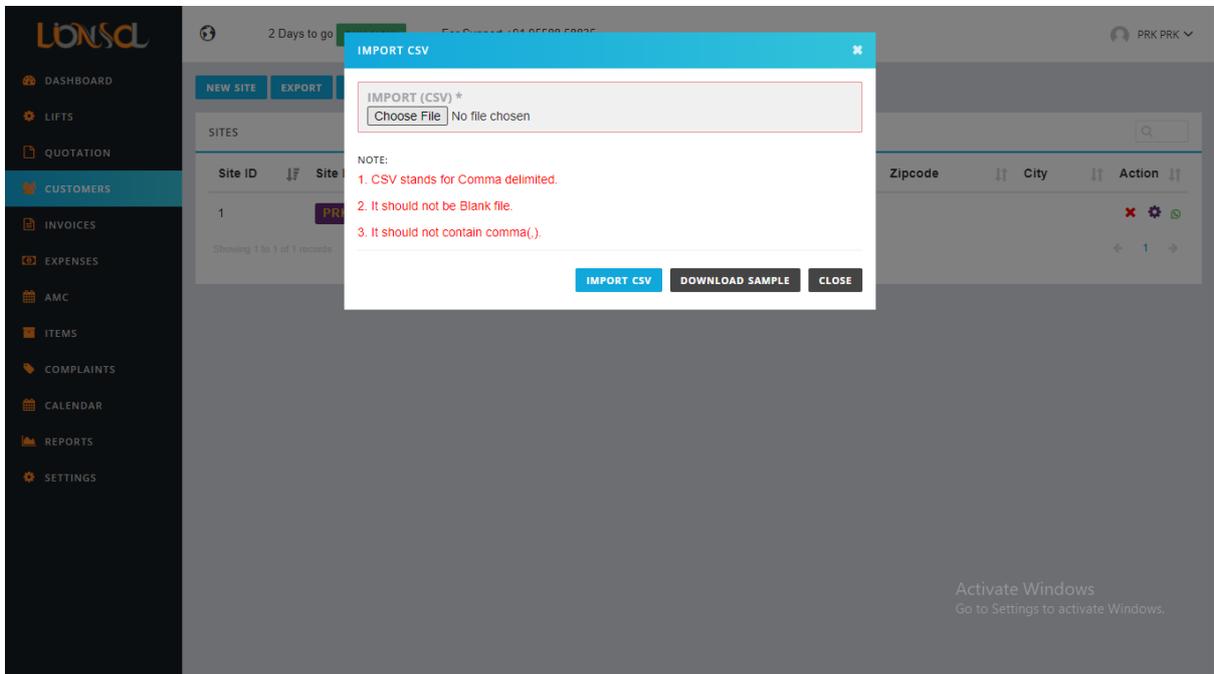
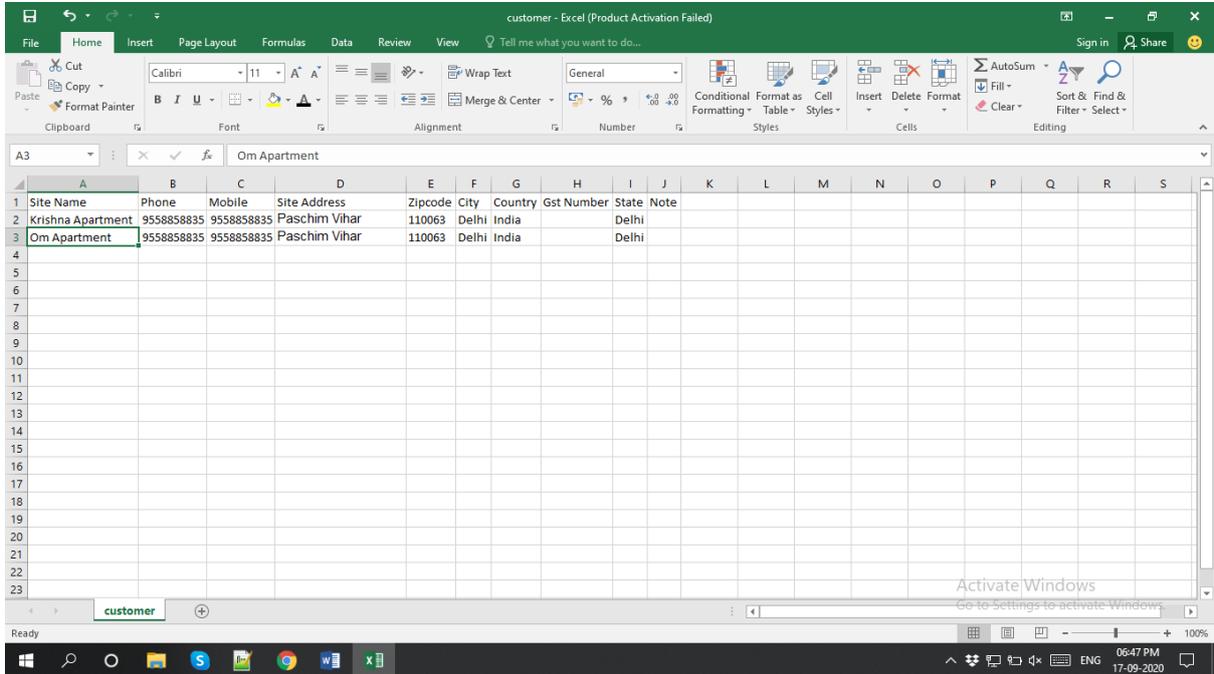
Note: Import file should not be blank. And it should not contain comma (,).

## 1) Customer Import CSV:

Step 1: Go to customers. Click Import CSV button. Download the Sample document.



Step 2: Set the data according to sample given. And Import.



For Support +91 95588 58835

2 Days to go [BUY NOW](#) For Support +91 95588 58835

PRK PRK

[NEW SITE](#) [EXPORT](#) [IMPORT CSV](#)

SITES

Site ID	Site Name	Primary Contact	Email	Zipcode	City	Action
2	Om Apartment	9558858835	No contact assigned	110063	Delhi	<a href="#">✖</a> <a href="#">⚙</a> <a href="#">📄</a>
1	Krishna Apartment	9558858835	No contact assigned	110063	Delhi	<a href="#">✖</a> <a href="#">⚙</a> <a href="#">📄</a>
0	PRK	9558858835	No contact assigned			<a href="#">✖</a> <a href="#">⚙</a> <a href="#">📄</a>

Showing 1 to 3 of 3 records

Activate Windows  
Go to Settings to activate Windows.

Step 3: Click on the customer Row and get Detail View of Customer. Set the Lifts in Customer by clicking Add Lifts button.

For Support +91 95588 58835

4 Days to go [BUY NOW](#) [customersupport@lionsol.in](mailto:customersupport@lionsol.in) Mon - Fri 9:30 am to 6:30 pm

How it works PRK PRK

**PRK**

SITE DETAILS [EDIT](#)

SITE NAME: <b>PRK</b>	MOBILE: 9558858835	CITY: -
PRIMARY CONTACT: -	GST NUMBER: -	COUNTRY: -
EMAIL: -	SITE ADDRESS: -	PROVINCE/STATE: -
PHONE: 9558858835	ZIP CODE: -	

CUSTOMER LIFTS [ADD LIFTS](#)

No Lifts

This client has no contacts! [Add Contact](#)

Activate Windows  
Go to Settings to activate Windows.

CONTACTS [ADD CONTACT](#)

**ADD LIFTS**

SET NO OF LIFTS \*  
2

SET NO OF LIFTS

BLOCK / WING \*  
A

47091;6,Johnson;408 KG;Capsule Lift;Gearless;G+6;M

BLOCK / WING \*  
F

47090;6,Johnson;408 KG;;Geared;G+5;Auto

SAVE CLOSE

No Lifts

ADD CONTACT

**PRK**

SITE DETAILS

EDIT

SITE NAME: PRK MOBILE: 9558858835 CITY: -

PRIMARY CONTACT: - GST NUMBER: - COUNTRY: -

EMAIL: - SITE ADDRESS: - PROVINCE/STATE: -

PHONE: 9558858835 ZIP CODE: -

CUSTOMER LIFTS

EDIT LIFT

Block / Wing	Lift Id	Floor	No of Passenger	Brand	Lift Type	Type	Machine Type	Action
A	47091	G+6	6	Johnson	408	Capsule Lift	Manual Gearless	✖
F	47090	G+5	6	Johnson	408	Auto	Geared	✖

ADD CONTACT

For more you can visit <https://youtu.be/H6-i-Kwufro>

## 2) Lift Import CSV:

Step 1: Go to lifts. Click Import CSV button. Download the Sample document.

Lift Id	No of Passenger	Brand	Load (Kg)	Lift Type	Machine Type	Floor	Action
15310	4 persons	Bright	272	Goods Lift	Gearless	G+2	✖ ⚙
15309	4 persons	Bright	272	Goods Lift	Gearless	G+2	✖ ⚙
15308	4 persons	Bright	272	Goods Lift		G+2	✖ ⚙
15307	4 persons	Bright	272	Goods Lift	Geared	G+2	✖ ⚙
15306	4 persons	Bright	272	Passenger Lift	Gearless	G+2	✖ ⚙
15305	4 persons	Bright	272	Passenger Lift	Gearless	G+2	✖ ⚙
15304	4 persons	Bright	272	Passenger Lift	Geared	G+2	✖ ⚙
15303	4 persons	Bright	272	Passenger Lift	Geared	G+2	✖ ⚙
15302	6 persons	bright	408	Goods Lift	Gearless	G+6	✖ ⚙
15301	6 persons	bright	408	Goods Lift	Gearless	G+6	✖ ⚙
15300	6 persons	bright	408	Goods Lift	Geared	G+6	✖ ⚙
15299	6 persons	bright	408	Goods Lift	Geared	G+6	✖ ⚙
15298	6 persons	bright	408	Passenger Lift	Gearless	G+6	✖ ⚙

**IMPORT CSV**

IMPORT (CSV) \*  
 No file chosen

NOTE:

1. CSV stands for Comma delimited.
2. It should not be Blank file.
3. It should not contain comma(,).

Step 2: Set the data according to sample given.

For Machine Type set as below given:

- Geared
- Gearless
- Hydraulic.

For Type set as below given:

- Auto
- Manual

For Floors set as below given:

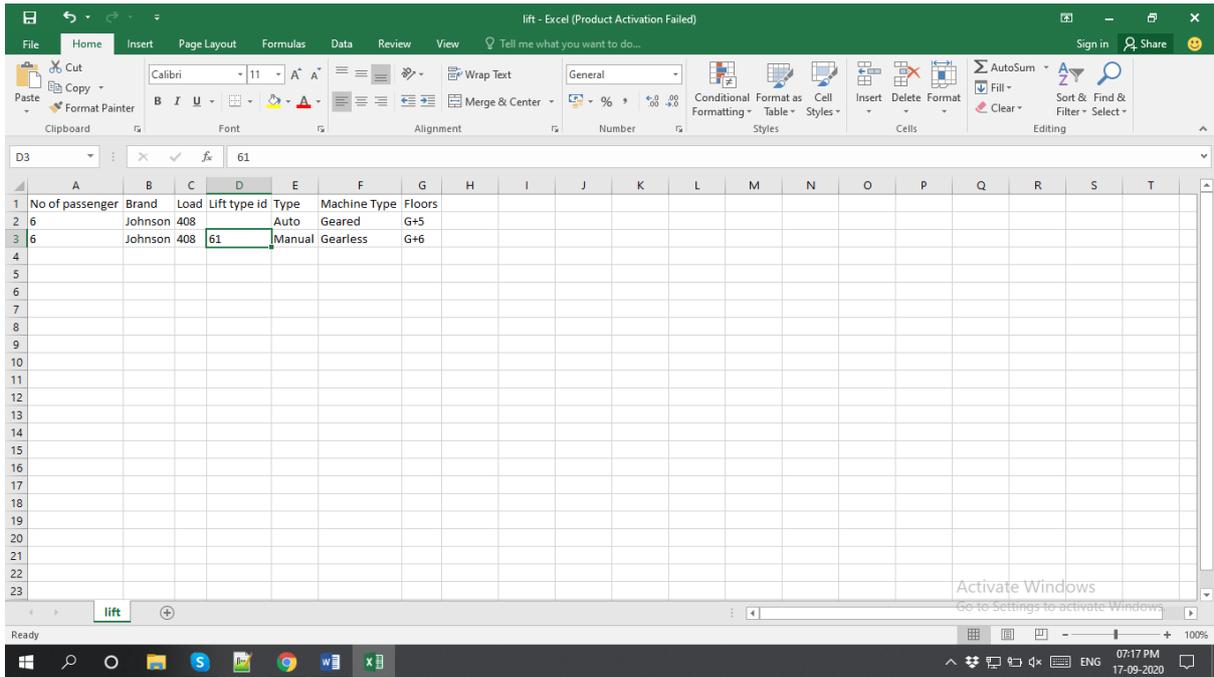
- G+1, G+2, ..., G+5
- B+G+1, B+G+2, ..., B+G+15
- B2+B1+G+1, B2+B1+G+2, ..., B2+B1+G+15

For **Lift type id** you can leave blank and edit after import OR you can go to settings > Lift type and set id mention there as shown below.

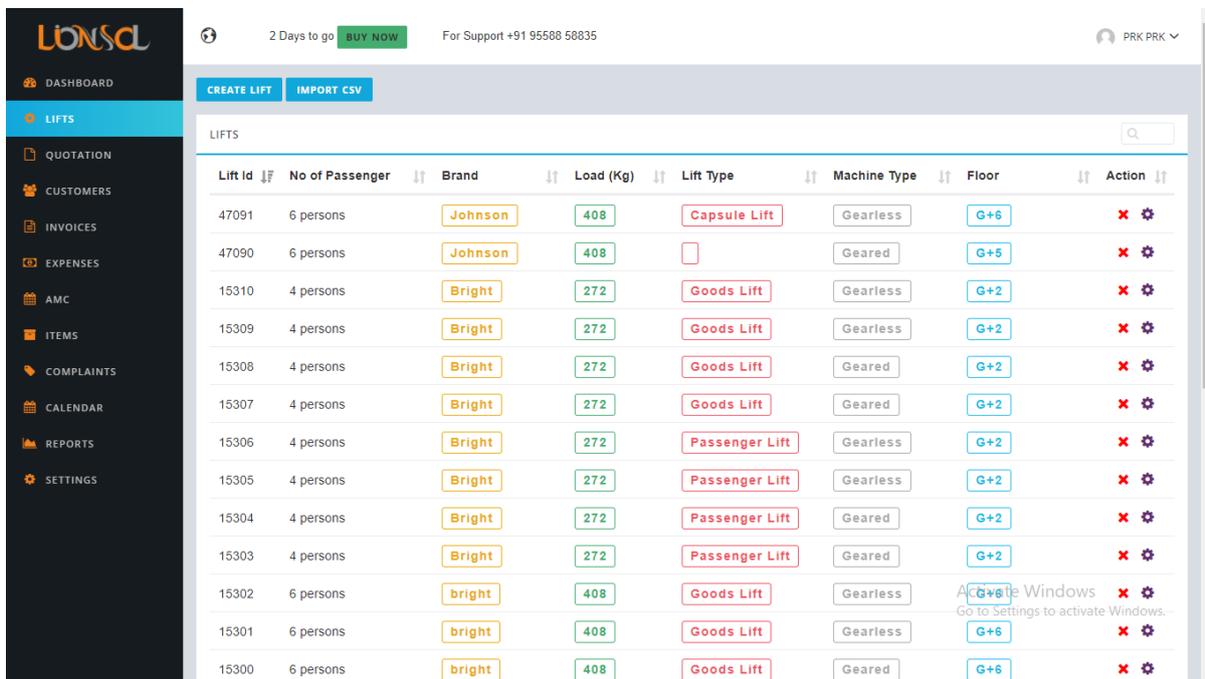
The screenshot shows the LIONSOL web application interface. The top navigation bar includes the LIONSOL logo, a '2 Days to go' timer, a 'BUY NOW' button, and a support contact number '+91 95588 58835'. The sidebar menu on the left lists various modules: DASHBOARD, LIFTS, QUOTATION, CUSTOMERS, INVOICES, EXPENSES, AMC, ITEMS, COMPLAINTS, CALENDAR, REPORTS, and SETTINGS (highlighted in blue). The main content area is titled 'ALL LIFT TYPE' and features a 'CREATE LIFT TYPE' button. Below this is a table with the following data:

ID	Name	Action
61	Capsule Lift	
60	Autodoor Lift	
59	Goods Lift	
58	Passenger Lift	
57	Hospital Lift	

At the bottom right of the page, there is a watermark that reads 'Activate Windows Go to Settings to activate Windows.'



Step 3: Import the file. After import See the Lift Id 47090 you need edit to set Lift type as Lift type id was not mention in csv. Whereas another Lift Id 47091 need not require any edit as Lift type id was mentioned in csv document we imported.



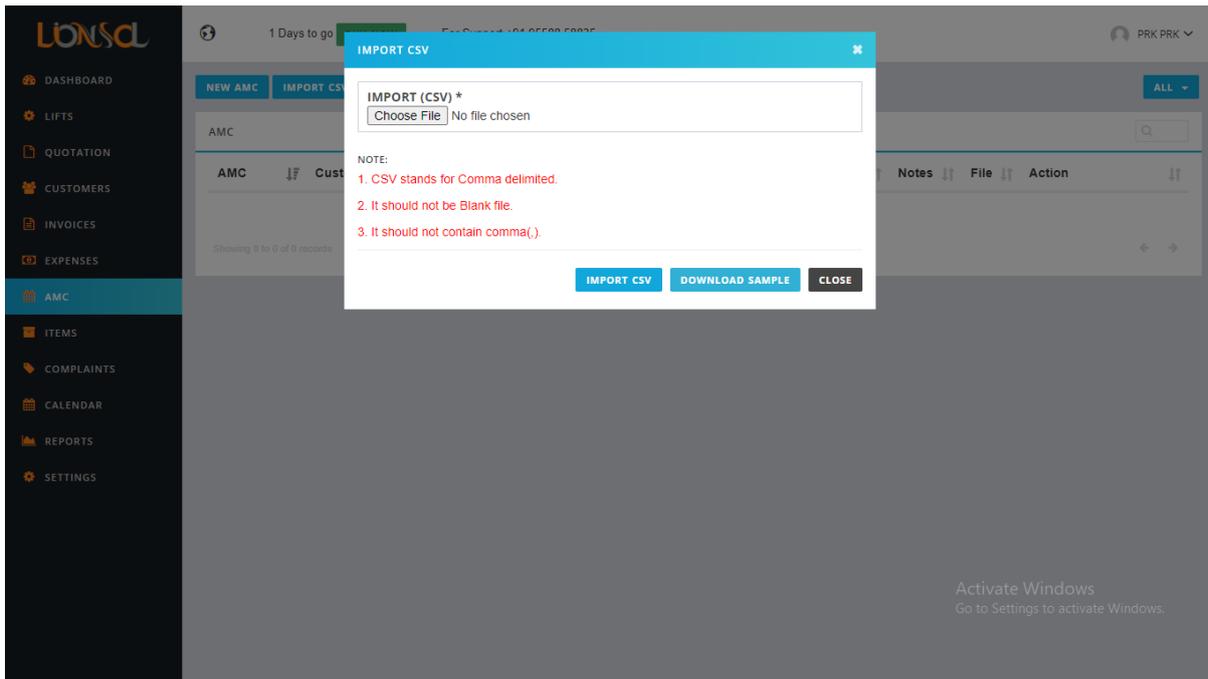
For more you can visit <https://youtu.be/uZbNmAiNJzk>

### 3) AMC Import CSV

Step 1: Go to Settings > AMC Contract. Set the following parameters according to your requirement.

- **AMC Contract Price Per Lift:** Used for the lift price calculation when, you directly generate contract while adding AMC. You can change the price while creating AMC.
- **AMC Contract Terms & Condition:** It is used in AMC Quotation. You can set the terms and condition according to you. It will reflect to all AMC Quotations.

Step 2: Go to AMC. Click Import CSV button. Download the Sample document.

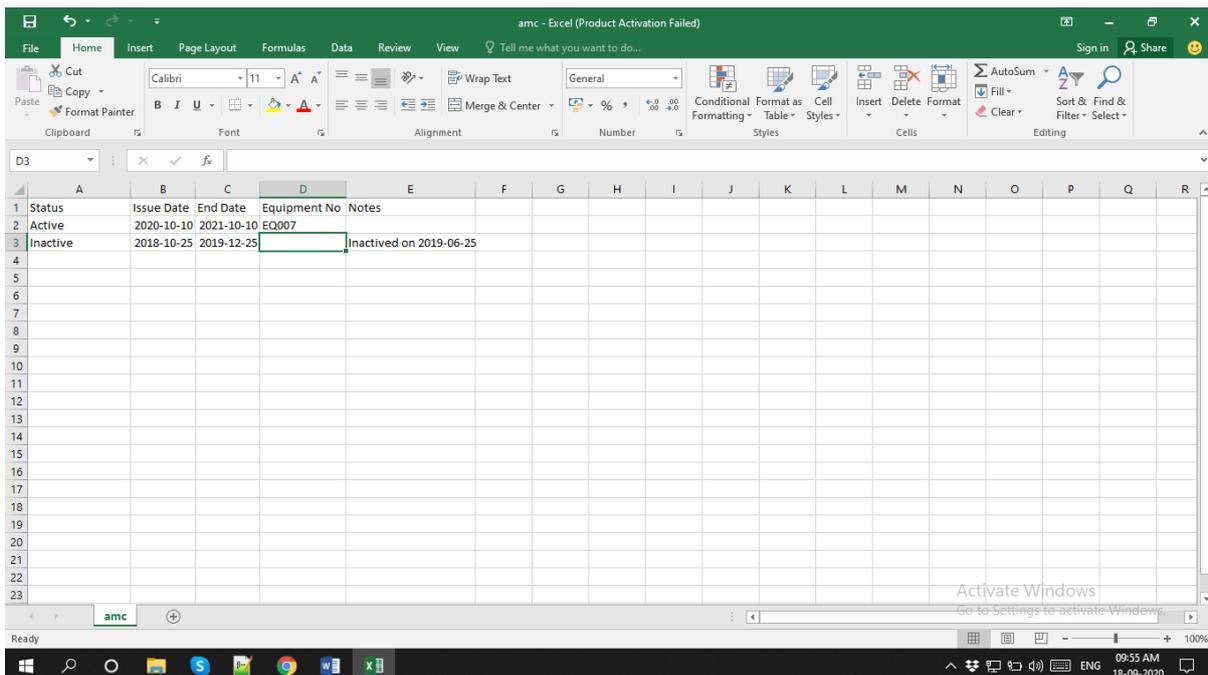


Step 3: Set the data according to sample given. And Import.

Set **Issue Date** and **End Date** in YYYY-mm-dd format (Ex: 2020-05-25)

For Status set as below given:

- Active
- Inactive
- Renewed
- Renew in process



Step 4: After Import. You will find data AMC as below shown

AMC	Customer	Issue Date	End Date	Next Payment	Status	No of Lifts	Notes	File	Action
2	No client assigned	25/10/2018	25/12/2019	01/11/2018	Inactive	0	Inactivated on 2019-06-25		[X] [Gears] [File]
1	No client assigned	10/10/2020	10/10/2021	17/10/2020	Active	0			[X] [Gears]

Showing 1 to 2 of 2 records

Step 5: Click Cog button to edit the AMC. You will find AMC as below. Now Edit AMC to relate it with Customer and Set Lifts.

**EDIT AMC**

CUSTOMER: -

REFERENCE ID \*: 2

EQUIPMENT NO:

STATUS: Inactive

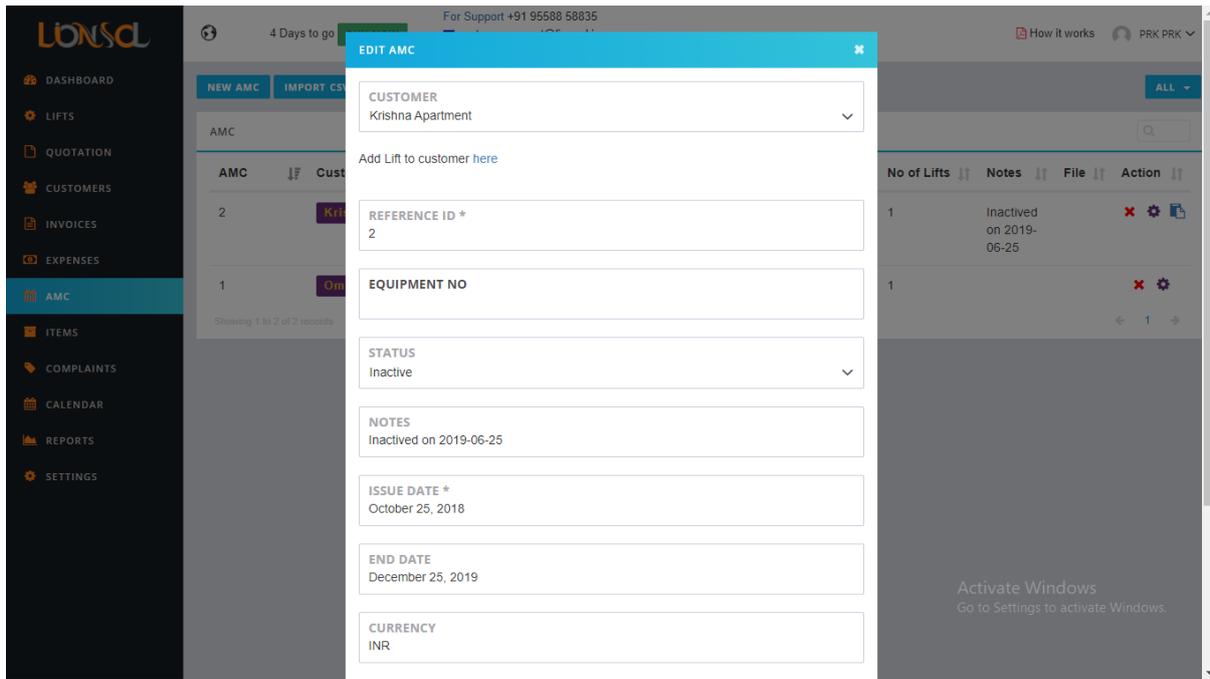
NOTES: Inactivated on 2019-06-25

ISSUE DATE \*: October 25, 2018

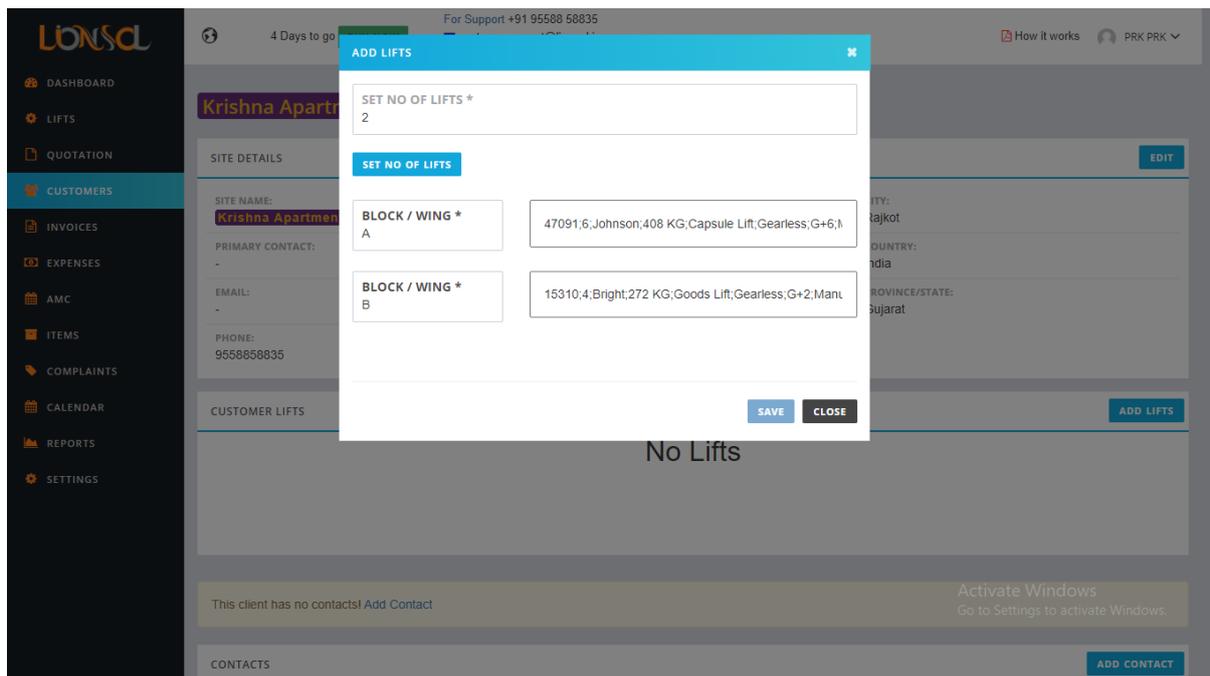
END DATE: December 25, 2019

CURRENCY: INR

UPLOADS FILES:



Step 6: Set Lifts in Customer by clicking Add Lifts.



4 Days to go **BUY NOW** For Support +91 95588 58835 customersupport@lionsol.in Mon - Fri 9:30 am to 6:30 pm How it works PRK PRK

### Krishna Apartment

**SITE DETAILS** EDIT

SITE NAME: <b>Krishna Apartment</b>	MOBILE: 9558858835	CITY: Rajkot
PRIMARY CONTACT: -	GST NUMBER: -	COUNTRY: India
EMAIL: -	SITE ADDRESS: Paschim Vihar	PROVINCE/STATE: Gujarat
PHONE: 9558858835	ZIP CODE: 360005	

**CUSTOMER LIFTS** EDIT LIFT

Block / Wing	Lift Id	Floor	No of Passenger	Brand	Load Kg	Lift Type	Type	Machine Type	Action
A	47091	G+6	6	Johnson	408	Capsule Lift	Manual	Gearless	✖
B	15310	G+2	4	Bright	272	Goods Lift	Manual	Gearless	✖

This client has no contacts! [Add Contact](#)

**CONTACTS** ADD CONTACT

**The Lift has been set!**

Step 7: Select the customer in AMC Edit. Set the details accordingly and remove the lift according to your necessity. And Save.

**EDIT AMC**

CUSTOMER: Krishna Apartment

Block / Wing	Lift Id	Floors	No of Passenger	Brand	Load Kg	Lift Type	Type	M
A	47091	G+6	6	Johnson	408	Capsule Lift	Manual	G
B	15310	G+2	4	Bright	272	Goods Lift	Manual	G

REFERENCE ID \*  
2

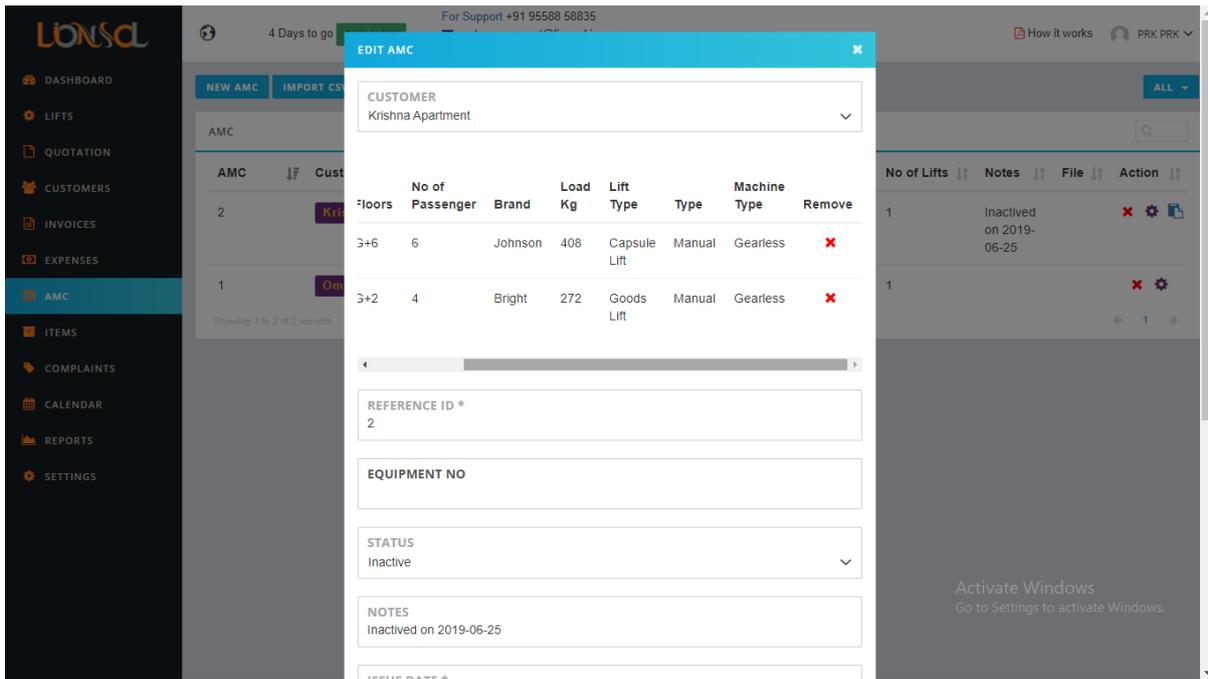
EQUIPMENT NO

STATUS  
Inactive

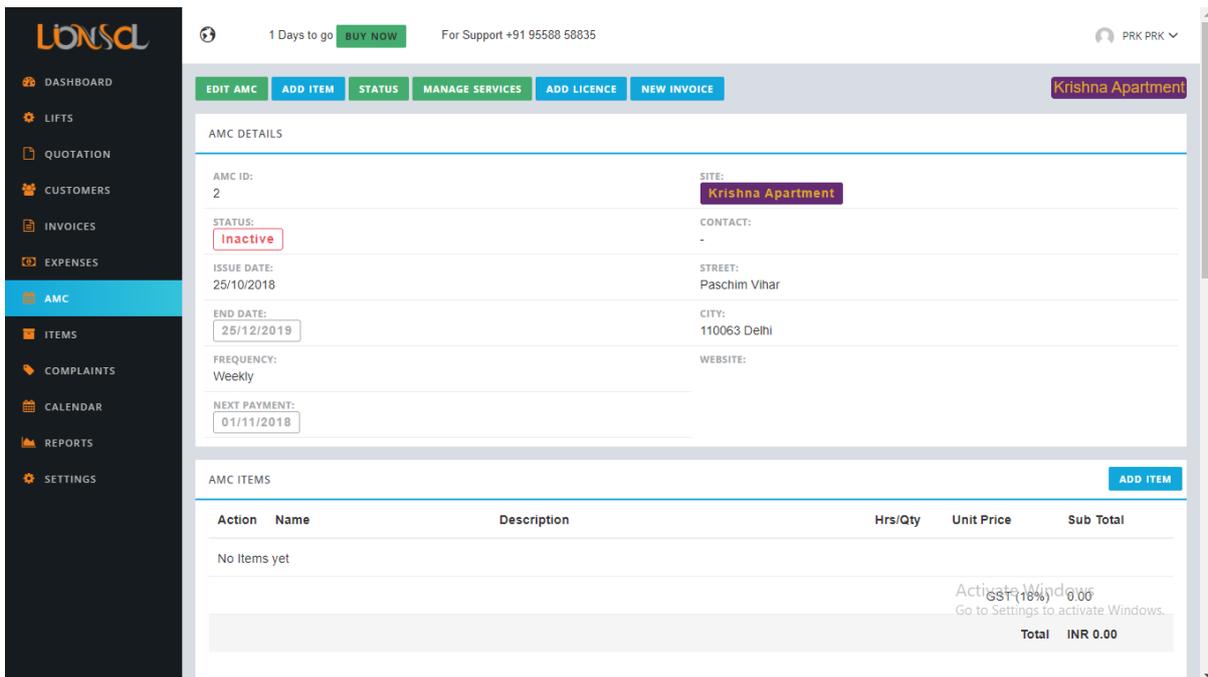
NOTES  
Inactivated on 2019-06-25

ISSUE DATE \*

**Activate Windows**  
Go to Settings to activate Windows.



Step 8: Click on the row to get complete details of AMC as shown below.



Step 9: Add Item. And Save it to get AMC Quotation.

The screenshot shows the 'ADD ITEM' modal form in the LIONSOL application. The modal is titled 'ADD ITEM' and contains the following fields:

- ITEM:** Annual Maintenance Contract - 8500 INR
- QUANTITY/HOURS \*:** 1
- DESCRIPTION:** AMC

Buttons for 'SAVE' and 'CLOSE' are visible at the bottom of the modal. The background interface shows the 'AMC DETAILS' section with the following information:

- AMC ID:** 2
- STATUS:** Inactive
- ISSUE DATE:** 25/10/2018
- END DATE:** 25/12/2019
- FREQUENCY:** Weekly
- NEXT PAYMENT:** 01/11/2018

The screenshot shows the 'AMC DETAILS' and 'AMC ITEMS' sections in the LIONSOL application. The 'AMC DETAILS' section includes the following information:

- AMC ID:** 2
- STATUS:** Inactive
- ISSUE DATE:** 25/10/2018
- END DATE:** 25/12/2019
- FREQUENCY:** Weekly
- NEXT PAYMENT:** 01/11/2018
- SITE:** Krishna Apartment
- CONTACT:** -
- STREET:** Paschim Vihar
- CITY:** 110063 Delhi
- WEBSITE:**

The 'AMC ITEMS' section displays a table with the following data:

Action	Name	Description	Hrs/Qty	Unit Price	Sub Total
	Annual Maintenance Contract	AMC	1	8,500.00	8,500.00
					<b>Total</b> INR 10,030.00

Step 10: Click on print icon in action to view Quotation as below.

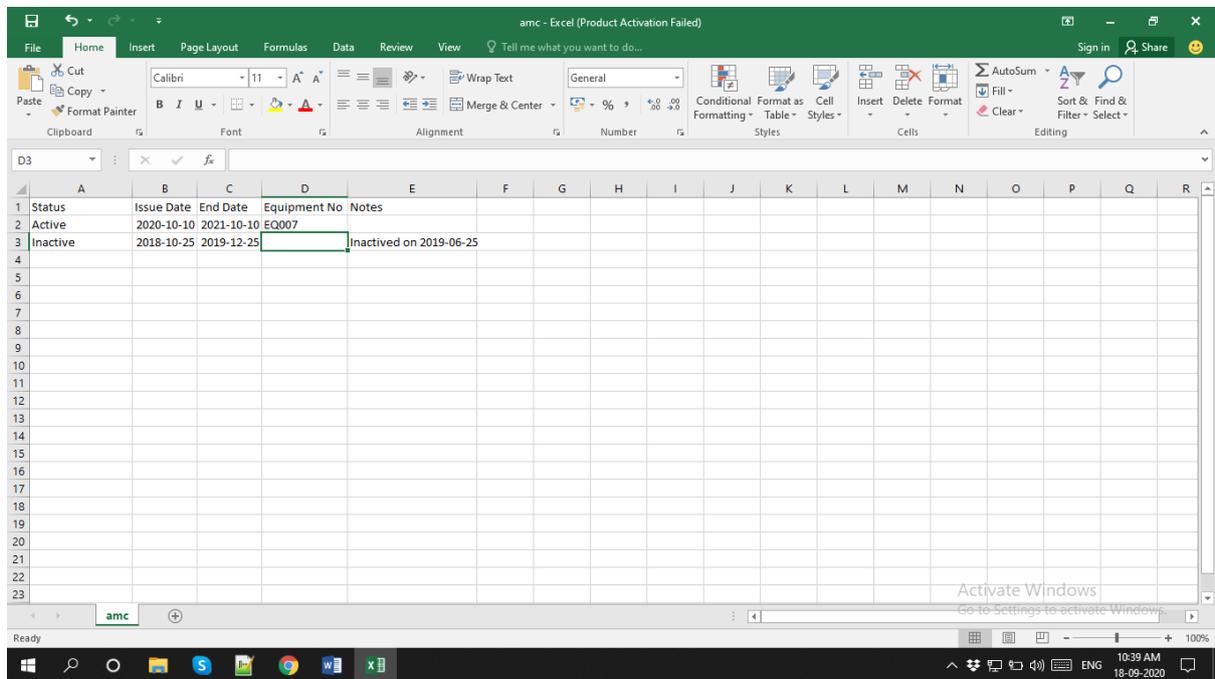
Ref No	2	Date	25 Oct 2018
Client No	BET	TYPE	/2018 - 2019
<b>Lift Maintenance Agreement</b>			
with	Krishna Apartment		
Here after describe " The Owner" ( which expression shall mean & include his successore, nominees & assigns)			
for the lift at	Paschim Vihar		
	Delhi		
<b>Number of lifts</b>			
1. Passenger : 6,	Load : 408 KG,	Lift Type : Capsule Lift,	Machine : Gearless, Floor : G+6, Type : Manual, Brand : Johnson,
&			
<b>prk agrees with the owner to maintain the above lift on the following</b>			
<b>TERMS &amp; CONDITION</b>			
1. prk send their qualified mechanics once in a month during their normal working hours for maintenance, inspection and to check the whole installation as well as			
2. prk also reserves the right to charge the Owner for Call Backs (inclusive of nuisance Call Backs) when such call Backs are the result of negligence or misuse of THE			
3. prk will send their Mechanic to the site as early as possible on receipt of information from a responsible person in our office, in case of any failure in the working of the			
4. In the interest of safety of the equipment and its users the Owner Shall Not direct or permit the repair, alternation, replacement or any interference with any of THE			
5. prk shall not responsible for any loss or delay caused by Acts of Government, strikes, riots, Lockouts, fire, Explosion, civil commotion, war,			
6. prk shall accompanies with the PWD officer for the yearly inspection, Charges for the same to the PWD will be paid by the Owner, It is the responsibility of the Owner to			
7. The Owner agrees to pay to prk for Non-Comprehensive Type Maintenance policy Contract of the Lift., Any Repairs/Replacement/ Up gradation & Painting of parts will			
8. The Owner agrees to pay to prk for Semi Comprehensive Type Maintenance policy Contract for the lift., Any Repairs or Replacement of existing worn-out parts will be			
9. In case of Nonpayment prk claims the right to suspend all duties specified in this agreement for as long as their demands are			

For Multi Lift Contract in AMC and more go to the link mentioned below.  
<https://youtu.be/ULepNxKt1BE>

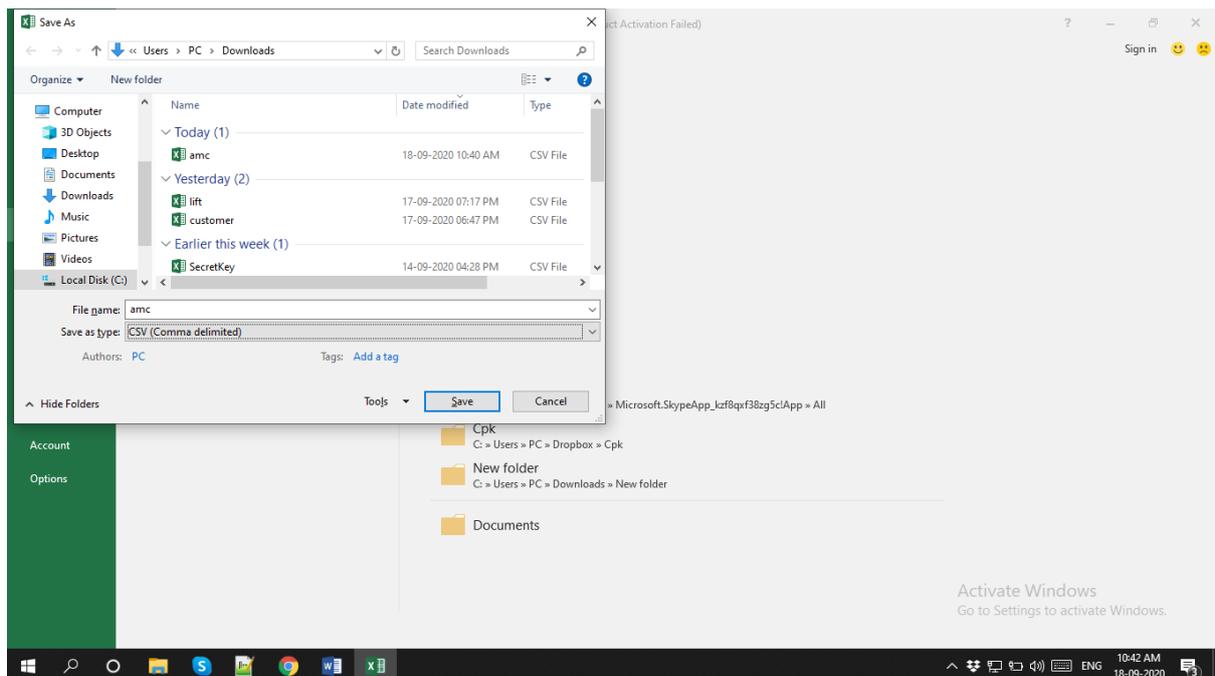
# How to save CSV file

Step 1: Open Excel.

Step 2: Set all data according to the format / sample that you have downloaded.



Step 3: Go to File > Save As. And change the Save as Type as CSV (Comma delimited). And just Save the file.



## What you need to keep in mind while importing CSV file?

- ✚ File you are importing must be CSV File.
- ✚ File should not be blank.
- ✚ File must be in the format, which are provided in download samples.
- ✚ File should not contain Comma (,).
- ✚ File must contain first row as Column name (mentioned in sample File).
- ✚ You cannot delete any of the Column name. If you do not have data related to that particular column just leave it blank.