

Modification summary

Date	Remarks
8/21/2023	Added column 23 - Delivery location user defined key
8/21/2023	All columns are shift after the added column
1/19/2024	Added column 30 - Vessel Name (Optional)

Import shipment data by Excel File

This document is written to describe how to import shipment records by uploading excel files into the system.

Overview

Data will be required in Microsoft Excel file format (xlsx). Users are required to upload the Excel file and process the file, data will be imported into the system by batch if there is no error. Data fields like Terminal, SSL, Customer name and delivery location are identified by the **EXACT** name match before the shipment data can be inserted in the system, so make sure to verify and check the name if they match. Otherwise, it will be ignored during the data importing process.

A/ Required Excel file data format

All data fields are optional EXCEPT container number.

	Column name	Specific format if any	Remarks	Example
1	container number			
2	container type		Must match with the container type name in the system if provided. Goto menu-> Master Tables-> Container Type -> container type must match with description of container type there.	40HQ, 20, 20RF.....etc
3	MBL		Master bill of lading	CMDUSGN1803730
4	PIN		Pin number if any	
5	Seal Number		Seal number	
6	DO Number		Delivery order number if any	
7	Terminal		Must match with terminal name in the system if provided. Goto menu-> Master Tables-> Locations-> Terminal name must match with the location name there.	APL, Evergreen....etc
8	Return Location		Must match with the terminal name in the system if provided. Goto menu-> Master Tables-> Locations-> Terminal name must match with the location name there.	APL, Evergreen....etc
9	SSL		Must match with the SSL name in the system if provided. Goto menu-> Master Tables-> SSL-> SSL name must	CMA, APL, COSCO

			match with the name there.	
10	ETA	MM/DD/YYYY	ETA	4/4/2023
11	Required Delivery	MM/DD/YYYY 99:99	Required delivery date time. Time will be in 24 hours format. If time is unknown, you can input only date here	4/4/2023 15:30 4/15/2023 12/31/2023 21:00
12	Pickup Date	MM/DD/YYYY	Pick up date	5/16/2023
13	Last Free Date	MM/DD/YYYY	Perdiem or Last Free date	5/16/2023
14	Appointment Date	MM/DD/YYYY	Appointment date	4/4/2023, 4/15/2023 etc
15	Appointment Time From	99:99	Time in 24 hours format. If time is unknown, leave it blank	11:30, 15:00, 23:30...etc
16	Appointment Time To	99:99	Time in 24 hours format. If time is unknown, leave it blank	11:30, 15:00, 23:30...etc
17	Delivery Date	MM/DD/YYYY	Delivery date	4/4/2023, 4/15/2023 etc
18	Delivery Time From	99:99	Time in 24 hours format. If time is unknown, leave it blank	11:30, 15:00, 23:30...etc
19	Delivery Time To	99:99	Time in 24 hours format. If time is unknown, leave it blank	11:30, 15:00, 23:30...etc
20	Customer code	Numeric	It is recommended to provide customer code to identify the EXACT customer you need. You can find the customer code as "Account ID" in customer profile. See screenshot S01. Goto menu-> Operation Master Tables-> Account Database-> Account ID column If customer code is provided, customer name will not be required.	
21	Customer name		It will be ignored if customer code is provided. Must match with the customer name in the system if provided. Goto menu-> Operation Master Tables-> Account Database-> Customer name must match with the company name there.	
22	Delivery location ID	Numeric	It is recommended to provide delivery location id to identify the EXACT delivery location you need. You can find the ID from the "Delivery Locations" tab under customer profile. See screenshot S02.	
23	Delivery location user defined key	Alphanumeric	It will be ignored if delivery location ID is provided.	

			User defined key which identifies delivery location instead of using location ID above. See screenshot S03	
24	Delivery location name		It will be ignored if delivery location ID is provided. Must match with the delivery location name in the system if provided.	
25	Forwarder Reference	max 200 chars	Forwarder reference if any Does not support Chinese characters, only English	
26	Customer Reference	max 100 chars	Customer reference if any Does not support Chinese characters, only English	
27	Remarks	max 200 chars	Remarks if any Does not support Chinese characters, only English	
28	Pier Pass	Decimal 999.99	Pier pass amount if any	60.00
29	CTF Charge	Decimal 999.99	CTF charges amount if any	90.00
30	Vessel Name	max 100 chars	Optional Vessel name If your account setup has vessel name turned on, you can import vessel name here	

ScreenShot S01

DEMO AMERICAN TRUCKING (ON SERVER2)
Trucking Management System
by Brian

Dashboard System Master Tables Operation Master Tables Shipment Reports

Account Database

new search string here... search

Account ID	Company Name	Address	Phone	Contact Person	Status	Last Modified	Action
57145	ABC Company Inc	,EL MONTE,US			ACTIVE	4/4/2022 1:09:35 PM by brian	
57149	AD & K Limited	11 e watson center road,CARSON,US	..		ACTIVE	3/31/2022 9:58:26 PM by brian	
57148	America First Shipping	400 e via mondo,RANCHO DOMINGUEZ,US			ACTIVE	7/16/2020 11:39:59 AM by brian	
57143	DEMO Company Ltd	1111 w 17th st,LONG BEACH,US			ACTIVE	12/16/2019 6:30:55 PM by brian	

ScreenShot S02

DEMO AMERICAN TRUCKING (ON SERVER2)
Trucking Management System
id: brian

save cancel

Account ID: 57143
Company Name: DEMO Company Ltd
Address: 1111 w 17th st
City: SHENZHEN
State Zip/Postal: CA - CALIFC
Phone:
Primary Email:
Additional Information:
Portal Control: WEB ACCESS OFF
User name: Password:

Account Type: Delivery Locations | Email List | Notes | Quotation | Portal Logs

new refresh

ID	Delivery Location	Location Address	C
275	例子例子例子例子例子	例子例子例子	C
219	DEMO Delivery Location - 219	2011 w 17th st	L
269	IMPECCABLE LOGISTICS SERVICE INC	585 STEWART AVE STE 416	G

ScreenShot S03

Primary Email: diana.vidal@testing.com
Additional Information:
Portal Control: WEB ACCESS ON
kkshipping testing

Account Type: Delivery Locations | Email List | Notes | Quotatio

new refresh

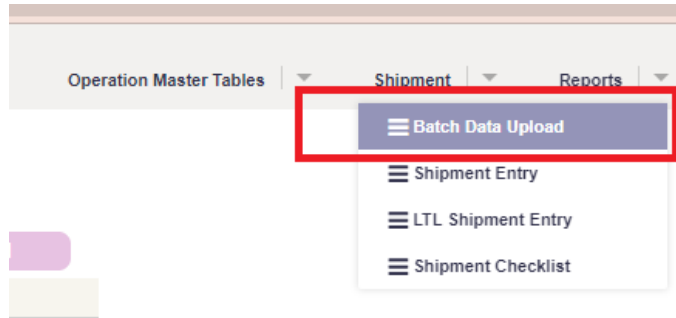
ID	USR Key	Delivery Location	Location Address
278	XXX	ADDRESS 21	DFJDLSAFJ
273	X01	BRIAN TESTING	ROAD ONE STRE
149		DEMO Delivery Location - 149	1551 S LILAC AVI
251		DEMO Delivery Location - 251	19914 S VIA BAR
252		DEMO Delivery Location - 252	22351 S WILMIN
258		DEMO Delivery Location - 258 (new name)	11500 LOS NIETC
262	X04	DEMO Delivery Location - 262	3350 1/2 WARNE
263		DEMO Delivery Location - 263	2850 E EL PRESII
265		DEMO Delivery Location - 265	280 trade st

total 11 records listed

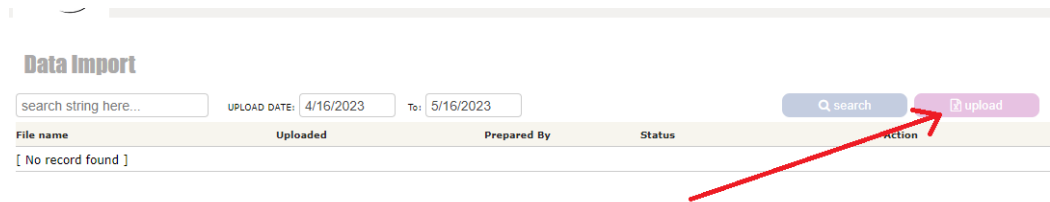
B/ Steps to import your data

Please prepare data in MS Excel file according to the required format described in section A. Then follow the steps below to upload your data file to the system.

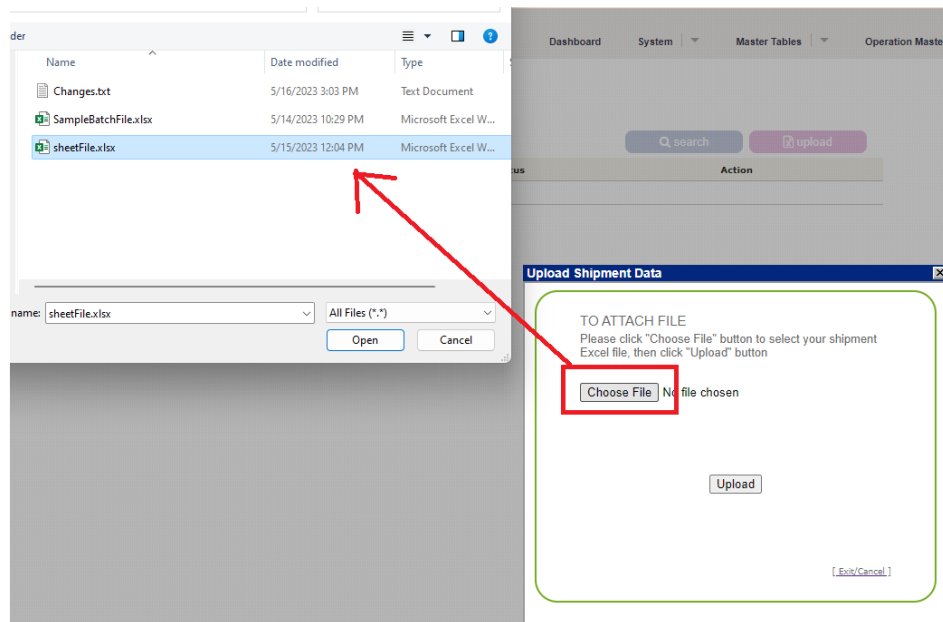
B1/ Select "Batch Data Upload" from the Shipment menu.



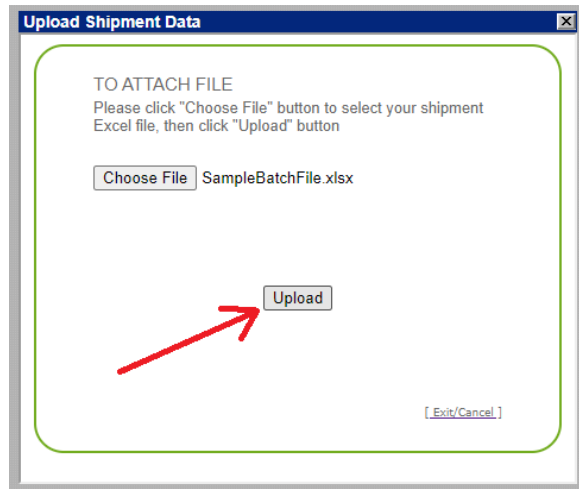
B2/ Click "upload" button



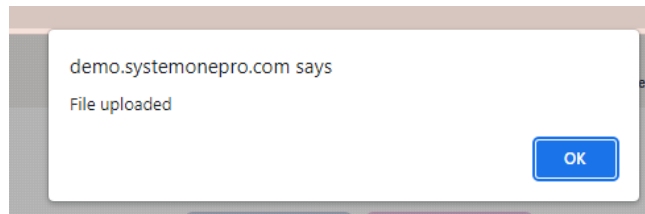
B3/ Click "Choose File" button, then locate and select your excel file in your computer.



B4/ Click "upload" button to proceed.



B5/ Wait until "File uploaded" is shown on the screen



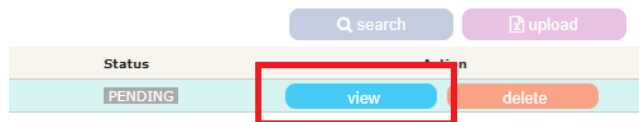
B6/ Then you will see your file listed in the box

Data Import

search string here... UPLOAD DATE: 4/16/2023 To: 5/16/2023 [search](#) [upload](#)

File name	Uploaded	Prepared By	Status	Action
SampleBatchFile.xlsx	05/16/2023 3:14PM	brian	PENDING	view delete

B7/ Click "view" button now to see the details of your uploaded file



B8/ In the view function, you will see all the list of all data in your file. If there is any error or problems found in the data, they will be marked in RED with reason shown in the list.

Import Data File - SampleBatchFile.xlsx file uploaded on: 5/16/2023 4:10:04 PM by brian

Please review the shipment data in the list and then click "confirm" button to complete the data import. Noted that record marked in RED are excluded from the data import. To overwrite the error, click the desired record and change the status before confirming to import the data.

FILE STATUS: **251010** ALL RECORDS IN FILE

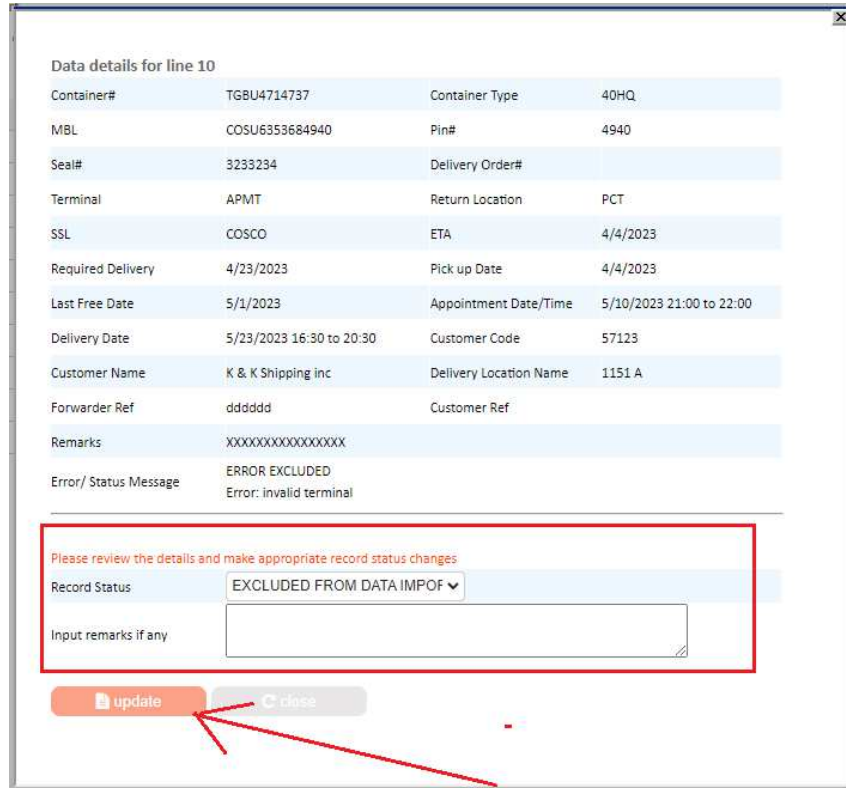
Line	Container#	Type	MBL	PIN#	DO#	Terminal	Return Location	SSL	ETA	Pickup	Last Free	Customer	Error/Status
1	TCLU8791170	40HC	OOLU2714774040	4040		LBCT-PIER E	LBCT-PIER E	APL	4/4/2023	4/4/2023	5/1/2023	DEMO Company Ltd	READY TO IMPORT
2	MAMU8112180	40HQ	MEDU09886415	6415	770-2229	PCT	PCT	APL	4/13/2023	4/13/2023	5/10/2023	K & K Shipping inc	Warning: invalid container Type READY TO IMPORT Warning: invalid delivery location name
3	CBHU8994458	40HQ	COSU8036037420	7420		PCT	LBCT-PIER E	COSCO	4/2/2023	4/2/2023	5/20/2023	DEMO Company Ltd	Warning: invalid delivery location name READY TO IMPORT
4	CBHU9130394	40HQ	COSU6353331650	1650		LBCT-PIER E	LBCT-PIER E	COSCO	4/5/2023	4/5/2023	5/1/2023	DEMO Company Ltd	Warning: invalid delivery location name READY TO IMPORT
5	TCNU2276272	40HQ	COSU8035626810	6810	770-2240	PCT	LBCT-PIER E	COSCO	4/2/2023	4/2/2023	5/16/2023	K & K Shipping inc	Warning: invalid delivery location name READY TO IMPORT
6	CANU6996697	40HQ	COSU6353183068	3068		LBCT-PIER E	LBCT-PIER E	COSCO	4/5/2023	4/5/2023	5/10/2023	K & K Shipping inc	Warning: invalid delivery location name READY TO IMPORT
7	OOCU8538375	40HQ	OOLU 4118583150	3150	25133621	LBCT-PIER E	LBCT-PIER E	APL	4/6/2023	4/6/2023	5/1/2023	K & K Shipping inc	Warning: invalid delivery location name READY TO IMPORT
8	TEMU6060804	40HQ	EGLV143300098350	8350		APM400	LBCT-PIER E	COSCO	4/5/2023	4/5/2023	5/16/2023	DEMO Company Ltd	Warning: invalid delivery location name READY TO IMPORT
9	FACU8702260	40HC	OOLU 4118652420	2420		LBCT-PIER E	LBCT-PIER E	APL	4/12/2023	4/12/2023	5/16/2023	DEMO Company Ltd	Warning: invalid delivery location name READY TO IMPORT
10	TGBU4714737	40HQ	COSU6353684940	4940		APMT	PCT	COSCO	4/4/2023	4/4/2023	5/1/2023	K & K Shipping inc	ERROR EXCLUDED Error: invalid terminal

In the bottom of the list, you can find how many records are uploaded to the system and how many of those are having errors. Noted that for those having errors, they will not be imported in the system.

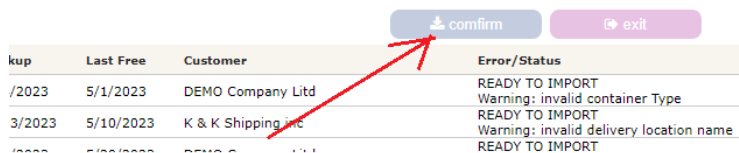
6	CANU6996697	40HQ	COSU6353183068
7	OOCU8538375	40HQ	OOLU 4118583150
8	TEMU6060804	40HQ	EGLV143300098350
9	FACU8702260	40HC	OOLU 4118652420
10	TGBU4714737	40HQ	COSU6353684940

total 10 records listed with 1 error(s)

- B9/ If you want to force importing those records having errors, follow the steps below. To overwrite the errors, click the desired record in the list, it then shows the details of the data. Here you can change the status to "INCLUDED IN DATA IMPORT" so that the system will ignore the errors and import the record into the system.



- B10/ To confirm the import. Here is the last step to create the shipment records from your file. Simply click "confirm" button to proceed.



B11/ Once it is confirmed, the system will change the file status to "IMPORTED"
Now you can see the shipment records created in your dashboard.

Import Data File - SampleBatchFile.xlsx file uploaded on: 5/16/2023 4:10:04

Please review the shipment data in the list and then click "confirm" button to complete the data import.
Noted that record marked in RED are excluded from the data import.
To overwrite the error, click the desired record and change the status before confirming to import the data.

FILE STATUS: **IMPORTED** ALL RECORDS IN FILE

Line	Container#	Type	MBL	PIN#	DO#	Termin
1	TCLU8791170	40HC	OOLU2714774040	4040		LBCT-P
2	MANU8112100	40HC	MBLU80006415	6415	770 0000	PCT

B12/ In the shipment details page, you can see the "NEW SHIPMENT" status is created with remarks showing which excel file it came from.

Additional Client Info

Shipment Status Dispatch Schedule Billing Invoice Driver Commission Other Cost Attached Files Notes

new

Status	Event TimeStamp	Last Modified	User ID	IP	Dispatch Driver	Message
NEW SHIPMENT	CREATED ON:05/16/2023 4:23PM	05/16/2023 4:23PM	system	10.0.0.1	10.0.0.1	BATCH EXCEL DATA IMPORT - SampleBatchFile.xlsx