

CSV Upload

Aptean Ltd
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1 CSV Upload

1.1 Inbound CSV Upload

The inbound CSV Upload file format is specified below and can be created with the following fields:

| Col No. | Sheet Col. | Field | Type | Max Length | Example | Required |
|---------|------------|-----------------------|-----------|-----------------------|----------------------|----------|
| 1 | A | Load Delivery Date | Date | 8 digits (DDMMYYYY) | 10072014 | N |
| 2 | B | Load Delivery Time | Time | 4 digits (HHMM) | 1001 | N |
| 3 | C | End Delivery Date | Date | 8 digits (DDMMYYYY) | 10072014 | N |
| 4 | D | End Delivery Time | Time | 4 digits (HHMM) | 1759 | N |
| 5 | E | User Id | Character | 10 | JSmith | N |
| 6 | F | Job Code | Character | 20 | JOBCODE1 | Y |
| 7 | G | Cust Ref | Character | 30 | CR1 | Y |
| 8 | H | Job Type | Character | 2 | D | Y |
| 9 | I | Job Instruction | Character | 255 | Leave Next Door | N |
| 10 | J | Job Delivery Date | Date | 8 digits (DDMMYYYY) | 10072014 | Y |
| 11 | K | Job Delivery Time | Time | 4 digits (HHMM) | 1001 | Y |
| 12 | L | Job End Delivery Date | Date | 8 digits (DDMMYYYY) | 10072014 | Y |
| 13 | M | Job End Delivery Time | Time | 4 digits (HHMM) | 1031 | Y |
| 14 | N | Customer Name | Character | 50 | J Bloggs | Y |
| 15 | O | Address 1 | Character | 40 | 1 High Street | Y |
| 16 | P | Address 2 | Character | 40 | Trumpton | N |
| 17 | Q | Address 3 | Character | 40 | Lincoln | N |
| 18 | R | Address 4 | Character | 40 | Lincolnshire | N |
| 19 | S | Address 5 | Character | 40 | | N |
| 20 | T | Postcode | Character | 8 | L23 4hg | Y |
| 21 | U | Contact | Character | 40 | J Bloggs | N |
| 22 | V | Telephone | Character | 50 | 01234 34567 | N |
| 23 | W | Email | Character | 255 | JBloggs@blogmail.com | N |
| 24 | X | Container Id | Character | 30 | C1 | Y |
| 25 | Y | Product Id | Character | 40 | P1 | N |
| 26 | Z | Product Description | Character | 40 | Prod 1 | N |
| 27 | AA | Long Prod Description | Character | 255 | Long Prod 1 | N |
| 28 | AB | Planned Qty | Character | Max value: 2147483647 | 1 | N |
| 29 | AC | Site | Character | | Site1 | Y |
| 30 | AD | Job Group | Character | 10 | Group1 | Y |
| 31 | AE | Load Id | Character | 20 | LOAD1 | N |
| 32 | AF | Cust Code | Character | 20 | CUST CODE1 | N |
| 33 | AG | Vehicle Id | Character | 10 | VEH1 | N |

Files can be created using Excel or another spreadsheet and saved as CSV format.

For example a simple 1 line upload could be created as follows:

```
,,,,,JOBCODE1,CR1,D,,10072014,901,10072014,901,J Bloggs,,,...,C1,,,...,TEST,TEST,,
```

Example 1: Single Job, Single Container.

These examples can be pasted into Notepad and then 'saved as' a .csv file by specifying a .csv extension (e.g. example1.csv).

Uploading this would create a Job with 'JOBCODE1' for customer 'J Bloggs' with a single container record. Note: this assumes that the customer 'J Bloggs' already exists on the C-ePOD database.

An example of an upload for a customer that does not exist would be as follows:



,,,,JOBCODE2,CR2,D,,10072014,901,10072014,901,J Smith,1 High Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C1,,,TEST,TEST,,

Example 2: Single Container, Customer Information.

This could be saved as example2.csv.

1.2 Upload via Import screen

The import screen lists the following options:

Figure 1: Data Upload - Import screen.

- Job Group: Sets the Job Group the jobs are to be created for. Job Group is a method of separating Jobs for the same site.
- Upload Type: Should be set to 'OBS [CSV]'.
- Header Row: Should be set to 'Yes' if the first row of the CSV file contains a header row. The above examples do not so for these this value should be set to 'No'.

Once these values are set, click the 'Choose File' button and browse to the relevant folder for the file (e.g. example2.csv). Once it has been found, click 'Upload' to upload the data onto C-ePOD.

1.2.1 Validating Upload

The upload screen will list the result of the CSV upload, showing the upload information in the additional 'Validation' and 'Reason for Failure' columns:



The screenshot shows the 'Data Upload' screen. At the top, there are buttons for 'Choose file' (with 'No file chosen'), 'Upload' (with a file icon), and 'Upload Type' set to 'OBS [CSV]'. A message at the top right says 'Upload Status: 1 records have been successfully uploaded 0 have failed to upload.' Below this, 'Job Upload Options' are set to 'Job Group: JG01' and 'Header Row: No'. The main area displays a table with 31 columns. The first row contains column headers: col9, col10, col11, col12, col13, col14, col15, col16, col17, col18, col19, col20, col21, col22, col23, col24, col25, col26, col27, col28, col29, col30, col31, Validation, and Reason for Failure. The data row shows the following values: 10072014, 901, 10072014, 901, J Smith, 1, High Street, Wimbledon, London, W12 8TZ, Mr J Smith, 01234, jsmith@gmail.com, C1, TEST, TEST, File Uploaded, and Validation Reason for Failure. The table has a header row and 31 data columns.

Figure 2: Data Upload - Validation.

In this case, there was only one record to upload and the Validation field indicates the record was successfully uploaded.

The details of the Job created can be checked by entering the job details screen and searching for the Job Code.

The screenshot shows the 'Jobs' screen. At the top, there are buttons for 'Find' (with a magnifying glass icon), 'New' (with a plus icon), and 'Logout' (with a user icon). The main area displays a table titled 'Current Jobs'. The table has columns: Load, Job, Type, Group, Customer Ref., Job Code, Service Level, Planned, Actual, Arrival, Status, and Customer. One row is shown: Load 'YTE-00108440', Job 'TRT004A09K', Type 'Delivery', Group 'TEST', Customer Ref. 'CR2', Job Code 'JOBCODE2', Service Level '1', Planned '10/07/2014 09:01', Actual '0 00:00', Arrival '10/07/2014 09:01', Status 'Pending', and Customer 'J Smith 0000000000000000'. Below the table, a message says 'Showing 1 to 1 of 1 entries'.

Figure 3: Job Details - Uploaded job, load number defaulted.

Note: A 'Load Id' was not specified in the upload file. In this case, the system has generated a load number 'YTE-00108440'.

1.3 Automatic Upload

It is possible to setup an inbound polling process that will automatically upload files from a certain folder. In the "Export Config" screen within C-ePOD, a record should be defined as follows:



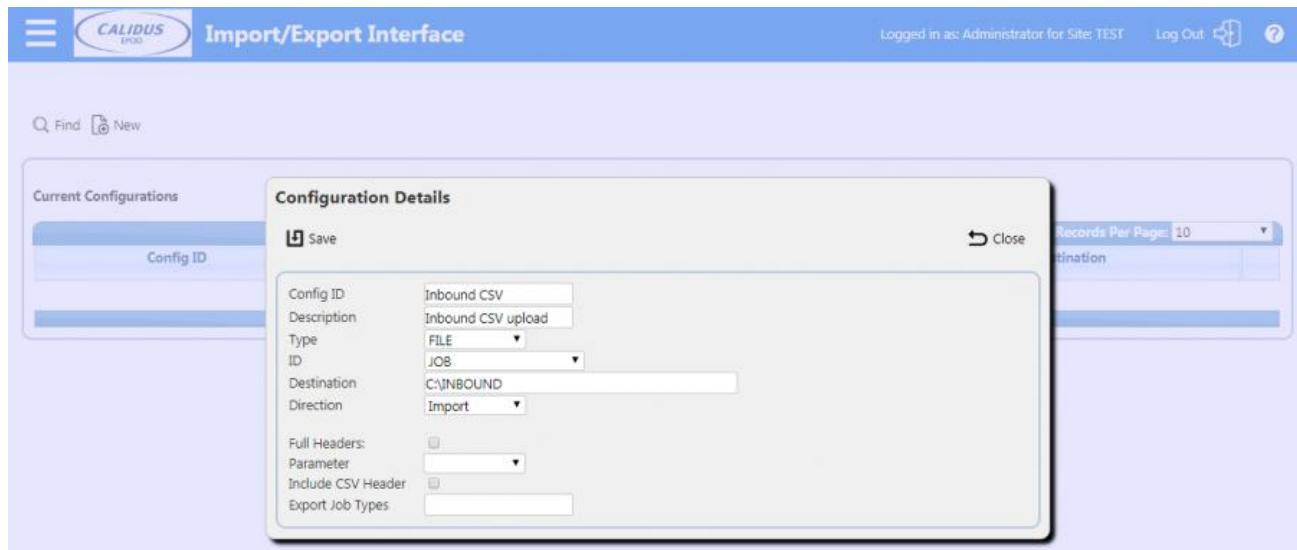


Figure 4: Export Configuration - Configuration Details.

- Config ID: Inbound CSV
- Description: Inbound CSV Upload
- Type: FILE
- ID: JOB
- Destination: Upload Folder (C:\Inbound in this example)
- Direction: I (Inbound)

This indicates that files copied to the 'C:\Inbound' folder on the server which C-ePOD is running will be uploaded automatically into C-ePOD. **Note:** Some additional configuration is required to schedule an inbound polling job which picks up this configuration.

1.3.1 Validating Upload

For example, if we copy the example1.csv file mentioned above into the C:\Inbound folder.

Enter the 'Export Audit' screen and search for records created on the current date:

| Import/Export Audit | | | | | | Logged in as: Administrator for Site: TEST | Log Out | ? | | | | | | | | | | | | | | | | | | |
|---|-----------|-------------|-------------|---------------------|--------|---|---------|---------|-----------------|-----------|-------------|-------------|---------------------|--------|-------------|--------|---------|------|----------|--|--|------------------|------|---|--|--|
| Showing 1 to 1 of 1 entries | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Show 10 entries</th> <th>Job Group</th> <th>Reference 1</th> <th>Reference 2</th> <th>Request Date / Time</th> <th>Status</th> <th>Description</th> <th>Action</th> <th>Search:</th> </tr> </thead> <tbody> <tr> <td>TEST</td> <td>JOBCODE1</td> <td></td> <td></td> <td>22/01/2019 15:55</td> <td>Fail</td> <td>Insufficient details for customer record creation. Minimum Address Line 1 and Postcode expected. - at EPODServer.EPOD_DATAPROCESS.ProcessOBSUpload(String DefaultCon, String DefaultPro, DataSet dsData, String strFilename, String strSiteParam, String strJobGroupParam, String strSource, String strIncludeHeader, String& strMessageText, DataTable& dtErrorList)</td> <td></td> <td></td> </tr> </tbody> </table> | | | | | | | | | Show 10 entries | Job Group | Reference 1 | Reference 2 | Request Date / Time | Status | Description | Action | Search: | TEST | JOBCODE1 | | | 22/01/2019 15:55 | Fail | Insufficient details for customer record creation. Minimum Address Line 1 and Postcode expected. - at EPODServer.EPOD_DATAPROCESS.ProcessOBSUpload(String DefaultCon, String DefaultPro, DataSet dsData, String strFilename, String strSiteParam, String strJobGroupParam, String strSource, String strIncludeHeader, String& strMessageText, DataTable& dtErrorList) | | |
| Show 10 entries | Job Group | Reference 1 | Reference 2 | Request Date / Time | Status | Description | Action | Search: | | | | | | | | | | | | | | | | | | |
| TEST | JOBCODE1 | | | 22/01/2019 15:55 | Fail | Insufficient details for customer record creation. Minimum Address Line 1 and Postcode expected. - at EPODServer.EPOD_DATAPROCESS.ProcessOBSUpload(String DefaultCon, String DefaultPro, DataSet dsData, String strFilename, String strSiteParam, String strJobGroupParam, String strSource, String strIncludeHeader, String& strMessageText, DataTable& dtErrorList) | | | | | | | | | | | | | | | | | | | | |

Figure 5: Export Audit - Verify upload.

In this example, the description field indicates that the record could not be uploaded. This is due to the fact that for the data listed above for example1 does not contain customer address details.

In order to fix this error, the Customer should be manually created within the C-ePOD system. Enter the Customer Maintenance screen and create a new record for 'J Bloggs'.



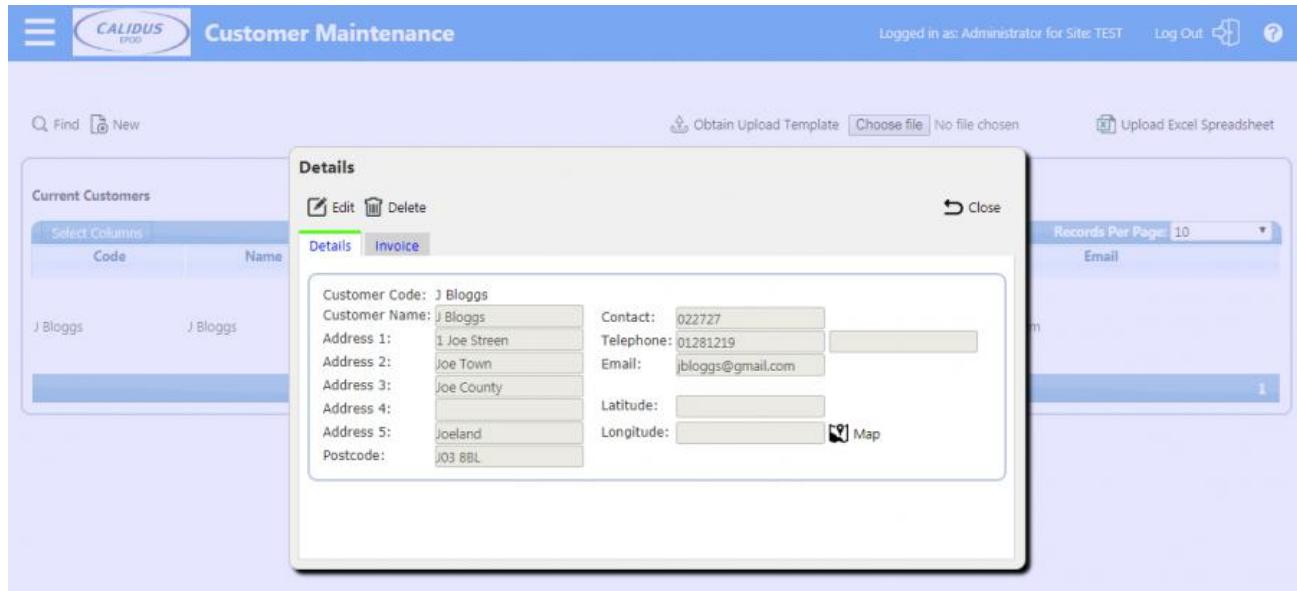


Figure 6: Customer Maintenance - New Customer.

The previous example1.csv file can now be re-uploaded. In order to do this, the file should be moved from the error folder (e.g. C:\Inbound\errors) back into the upload folder. Once the file has re-processed, check the 'Export Audit' screen again:

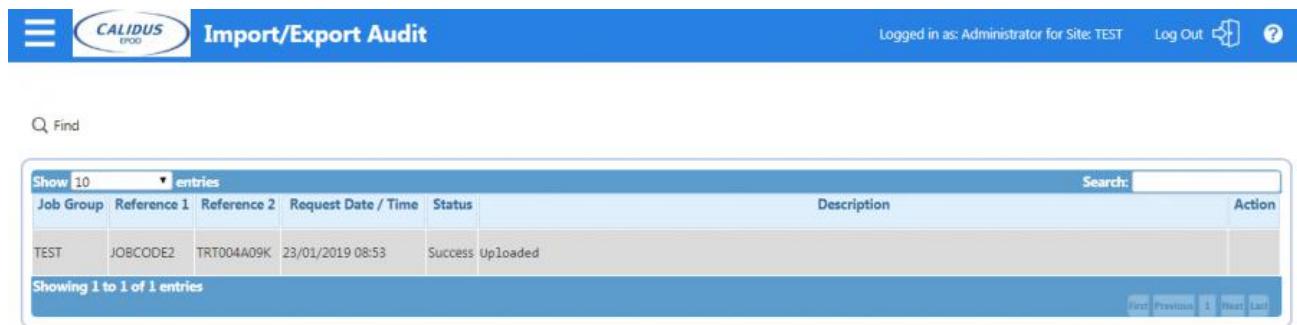


Figure 7: Export Audit - Verify upload.

The Description field of 'Uploaded' on the last line indicates that the job was successfully created.

1.4 Import File Examples

1.4.1 Including a Header Record

An extra line can be included at the front of the file to include Header Text for each column. This makes it much easier to create records within Excel or another spreadsheet tool. For this example (example3.csv) we will create a new upload file with a header row and two new job codes:

```
EPL_LOAD_START_PLANNED_DATE, EPL_LOAD_START_PLANNED_TIME, EPL_LOAD_END_PLANNED_DATE,
EPL_LOAD_END_PLANNED_TIME, EPL_USER_ID, EPL_JOB_CODE, EPL_CUST_REF, EPL_JOB_TYPE,
EPL_JOB_INSTRUCTION, EPL_START_PLANNED_DATE, EPL_START_PLANNED_TIME,
EPL_END_PLANNED_DATE, EPL_END_PLANNED_TIME, EPL_CUSTOMER_NAME, EPL_ADDRESS_1,
EPL_ADDRESS_2, EPL_ADDRESS_3, EPL_ADDRESS_4, EPL_ADDRESS_5, EPL_POSTCODE, EPL_CONTACT,
EPL_TELEPHONE, EPL_EMAIL, EPL_CONTAINER_ID, EPL_PRODUCT, EPL_DESCRIPTION,
EPL_DESCRIPTION_LONG, EPL_PLANNED_QTY, EPL_SITE_ID, EPL_JOB_GROUP, EPL_LOAD_ID,
EPL_CUST_CODE
```

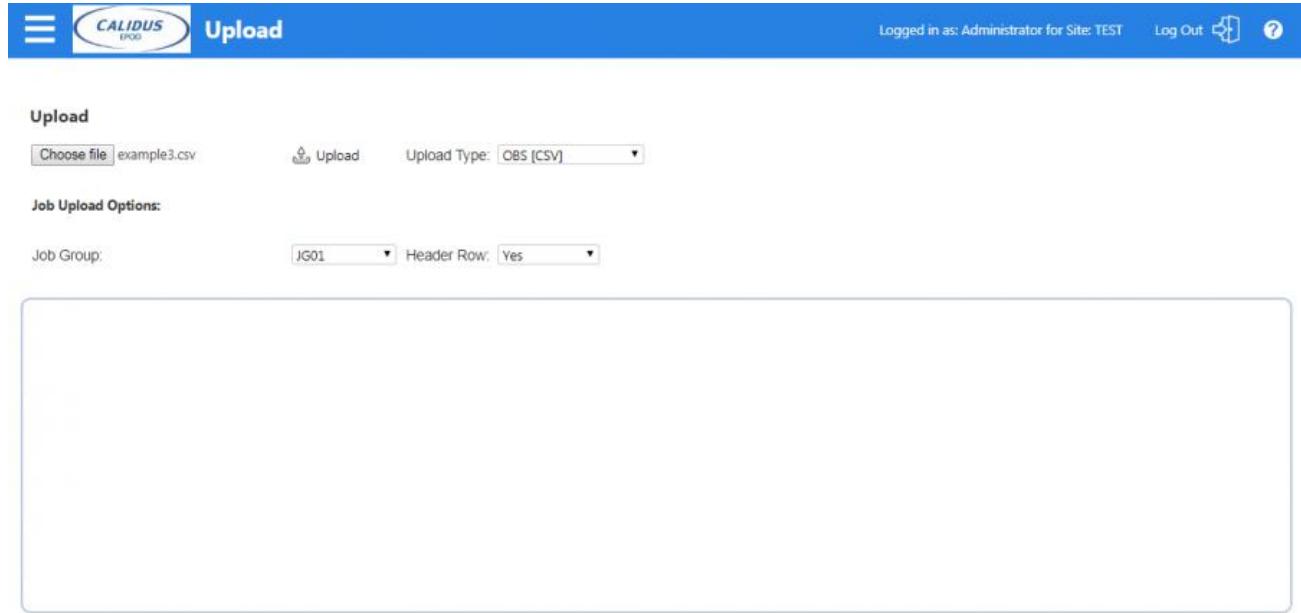
```
,,,,JOBCODE3,CR3,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C3,,,TEST,TEST,,
```



,,,,JOBCODE4,CR4,D,,10072014,901,10072014,901,J Smith,1 High Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C4,,,TEST,TEST,,

Example 3: Two Jobs for Single Containers with Customer Information and Header Row.

Browse to this file from the upload screen, this time setting the 'Header Row' as 'Yes':



Upload

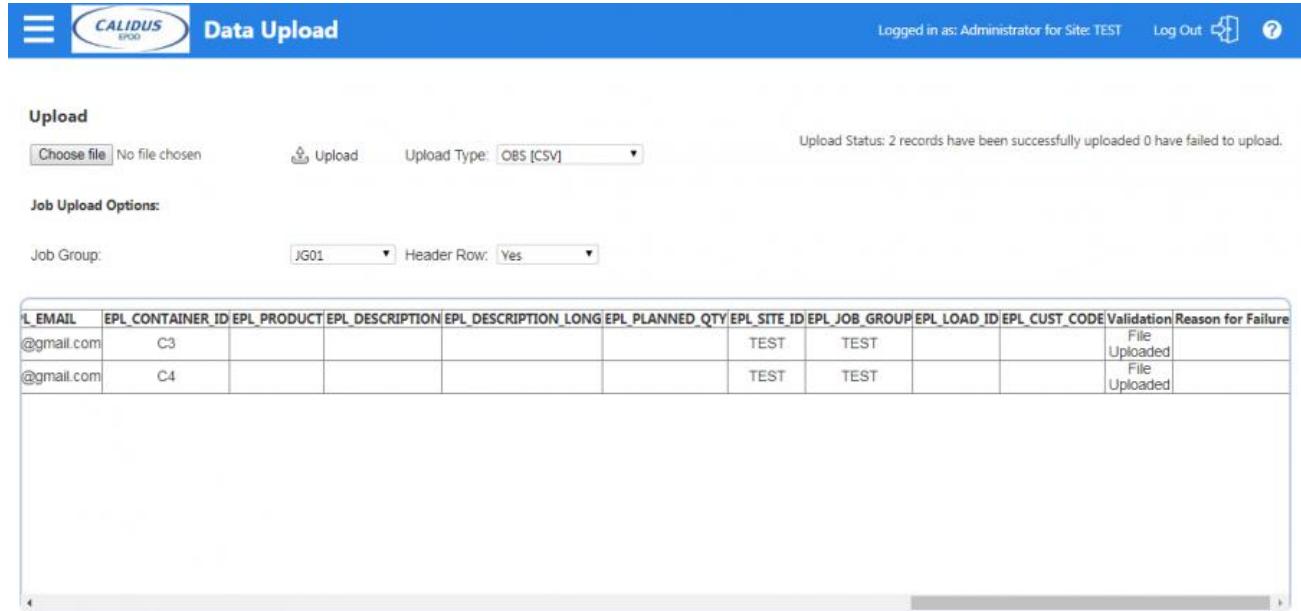
Choose file: example3.csv  Upload Upload Type: OBS [CSV]

Job Upload Options:

Job Group: JG01 Header Row: Yes

Figure 8: Data Upload - Import screen.

Uploading this file using the manual upload screen gives the following result:



Data Upload

Logged in as: Administrator for Site: TEST Log Out 

Upload

Choose file: No file chosen  Upload Upload Type: OBS [CSV]

Upload Status: 2 records have been successfully uploaded 0 have failed to upload.

Job Upload Options:

Job Group: JG01 Header Row: Yes

| L_EMAIL | EPL_CONTAINER_ID | EPL_PRODUCT | EPL_DESCRIPTION | EPL_DESCRIPTION_LONG | EPL_PLANNED_QTY | EPL_SITE_ID | EPL_JOB_GROUP | EPL_LOAD_ID | EPL_CUST_CODE | Validation | Reason for Failure |
|------------|------------------|-------------|-----------------|----------------------|-----------------|-------------|---------------|-------------|---------------|---------------|--------------------|
| @gmail.com | C3 | | | | | TEST | TEST | | | File Uploaded | |
| @gmail.com | C4 | | | | | TEST | TEST | | | File Uploaded | |

Figure 9: Data Upload - Validation.

This shows both records were successfully created.



1.4.2 Creating New Products

For the jobs created so far, product details have not been included. If we examine the Job with Job Code 'JOBCODE1', we can see that a job was created with a container with Id 'C1' but the container does not have any corresponding products:

The screenshot shows two tables. The top table, 'Containers for Job: TRT004A09N', has columns for Container ID (C1), Description (Pending), Status (N), and Clause (Clause). The bottom table, 'Products for Container: C1', has columns for Product Code, Sequence, Customer Ref., Item Type, Long Description, Qty Planned, and Qty Actual. Both tables show 1 entry each.

Figure 10: Data Upload - Import screen.

If more details are required to be stored against each job, then it is possible to create product records for each container. This example will create a job with one container and 2 product codes:

```
,,,,JOBCODE5,CR5,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J
Smith,01234,jsmith@gmail.com,C5_1,PROD1,PRODDESC1,LONGDESC1,1,TEST,TEST,,
```

```
,,,,JOBCODE5,CR5,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J
Smith,01234,jsmith@gmail.com,C5_1,PROD2,PRODDESC2,LONGDESC2,2,TEST,TEST,,
```

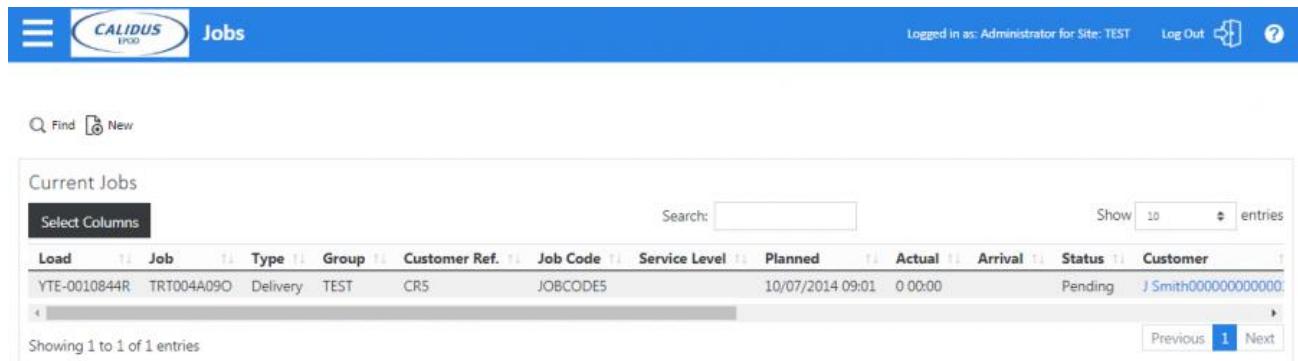
Example 4: Single Job, Single Container, Multiple Products.

The 'Data Upload' screen shows a file upload interface with a 'Choose file' button, 'Upload' button, and 'Upload Type: OBS [CSV]' dropdown. The preview table shows two rows of data with columns labeled from col11 to col31. The first row corresponds to the first CSV line, and the second row corresponds to the second CSV line. The preview table includes columns for 'Validation' and 'Reason for Failure'.



Figure 11: Data Upload - Validation.

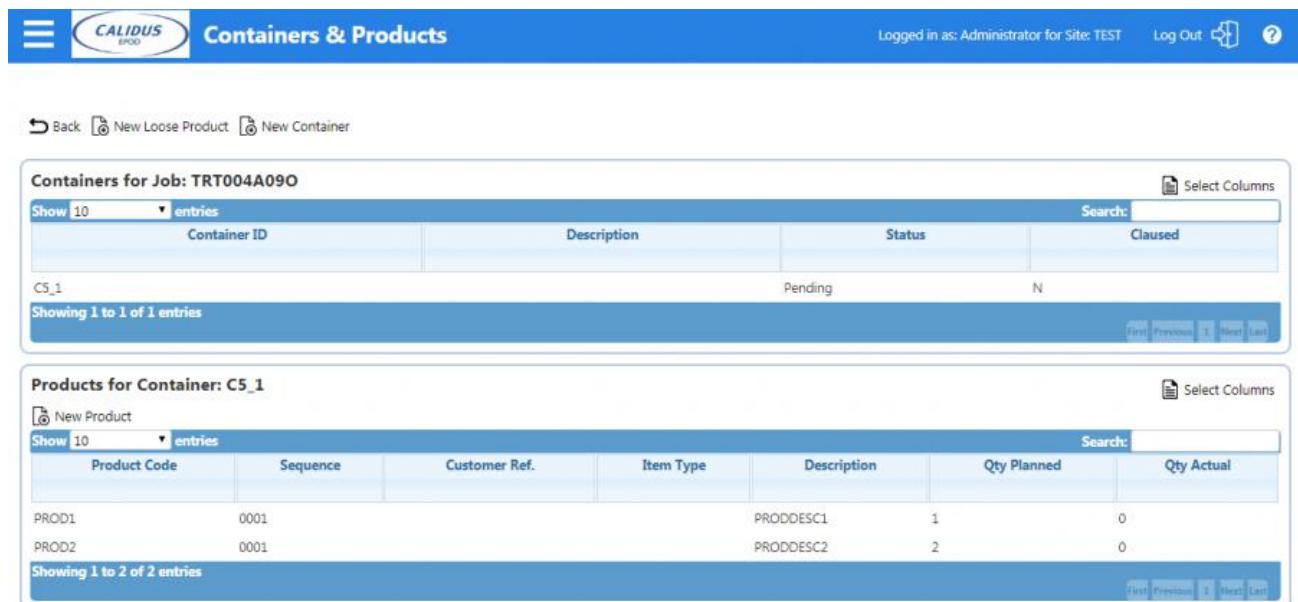
Check the Job created in the 'Job Details' screen:



The screenshot shows the 'Jobs' screen with a single job entry listed:

| Load | Job | Type | Group | Customer Ref. | Job Code | Service Level | Planned | Actual | Arrival | Status | Customer |
|--------------|------------|----------|-------|---------------|----------|---------------|------------------|---------|---------|---------|--------------------------|
| YTE-0010844R | TRT004A090 | Delivery | TEST | CR5 | JOBCODE5 | | 10/07/2014 09:01 | 0 00:00 | | Pending | J Smith 0000000000000000 |

Showing 1 to 1 of 1 entries

Figure 12: Job Details - Uploaded Job.


The screenshot shows the 'Containers & Products' screen for Job TRT004A090:

Containers for Job: TRT004A090

| Container ID | Description | Status | Clased |
|--------------|-------------|---------|--------|
| C5_1 | | Pending | N |

Showing 1 to 1 of 1 entries

Products for Container: C5_1

| Product Code | Sequence | Customer Ref. | Item Type | Description | Qty Planned | Qty Actual |
|--------------|----------|---------------|-----------|-------------|-------------|------------|
| PROD1 | 0001 | | | PRODDESC1 | 1 | 0 |
| PROD2 | 0001 | | | PRODDESC2 | 2 | 0 |

Showing 1 to 2 of 2 entries

Figure 13: Job Details - Container and Product Details.

This shows the two product records that were created.

1.4.3 Assigning to Users

For the examples we have created so far, the User Id has not been specified. This means the Loads created have been set at status 'Pending'. In reality, the load may already have been assigned a driver for delivery. This example shows a Job that has a user 'User1' already assigned to it:

```
,,,User1,JOBCODE6,CR6,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C6,,,TEST,TEST,,
```

Example 5: Single Job, Single Container, assigned to user.

Uploading the file and check the load created:



Upload Status: 1 records have been successfully uploaded 0 have failed to upload.

Job Upload Options:

Job Group: JG01 Header Row: No

| col9 | col10 | col11 | col12 | col13 | col14 | col15 | col16 | col17 | col18 | col19 | col20 | col21 | col22 | col23 | col24 | col25 | col26 | col27 | col28 | col29 | col30 | col31 | Validation | Reason for Failure |
|----------|-------|----------|-------|---------|---------------|-----------|-------|--------|---------|------------|-------|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|------------|--------------------|
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C6 | | | | TEST | TEST | | | | File Uploaded | | |

Figure 14: Data Upload - Validation.

This time the load has been created with status 'Assigned' with the user set as 'User1':

| Load | Planned Start | Actual Start | Planned End | Actual End | Vehicle | User | Status |
|--------------|---------------|--------------|-------------|------------|---------|-------|----------|
| YTE-00108445 | 0 00:00 | 0 00:00 | 0 00:00 | 0 00:00 | | User1 | Assigned |

Figure 15: Loads Screen - User assigned.

Note: The site parameter 'Import Create Standing Data' has to be checked in order for new users to be created:

Site Details: TEST

Save Cancel

| Details | Admin | PDA | Service | Import/Export |
|-------------------------------------|-------------------------------------|-----|---------|---------------|
| Auto Generate Loads: | <input checked="" type="checkbox"/> | | | |
| Loads Unique within System: | <input checked="" type="checkbox"/> | | | |
| Remove Unspecified Jobs from a Load | Enabled | | | |
| Jobs Unique within Load | Enabled | | | |
| Allow Blank Load | Disabled | | | |
| Import Create Standing Data | <input checked="" type="checkbox"/> | | | |
| CSV Upload Sequence | Order Provided | | | |
| Export Job Photos | Do not include Photos | | | |
| Export Load Photos | Do not include Photos | | | |
| Create TTM Stops | <input type="checkbox"/> | | | |
| Jobs with Notes Amended | <input type="checkbox"/> | | | |
| Use Owner Name for TTM | <input type="checkbox"/> | | | |



Figure 16: Site Maintenance - Import Create Standing Data.

1.4.4 Multiple Loads

For the example so far, a single load has been created for each upload. If two different usernames are included, then two separate Load Ids will be generated:

```
,,,User1,JOBCODE7,CR7,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C7,,,,TEST,TEST,,
```

```
,,,User2,JOBCODE8,CR8,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C8,,,,TEST,TEST,,
```

Example 6: Two Jobs, Two Users, two separate Loads.

Uploading this file results in two separate loads being created:

The screenshot shows the CALIDUS Data Upload interface. At the top, it says "Logged in as: Administrator for Site: TEST" and "Log Out". Below that is a "Upload" section with a "Choose file" button, an "Upload" button, and a "Upload Type: OBS [CSV]" dropdown. To the right, a message says "Upload Status: 2 records have been successfully uploaded 0 have failed to upload." Below this is a "Job Upload Options" section with "Job Group: JG01" and "Header Row: No". The main area is a table with 31 columns, showing two rows of data. The columns are labeled: col9, col10, col11, col12, col13, col14, col15, col16, col17, col18, col19, col20, col21, col22, col23, col24, col25, col26, col27, col28, col29, col30, col31, Validation, and Reason for Failure. The data in the table is as follows:

| 8 | col9 | col10 | col11 | col12 | col13 | col14 | col15 | col16 | col17 | col18 | col19 | col20 | col21 | col22 | col23 | col24 | col25 | col26 | col27 | col28 | col29 | col30 | col31 | Validation | Reason for Failure |
|----------|------|----------|-------|---------|---------------|-----------|-------|-------|--------|---------|------------|-------|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|--------------------|
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C7 | | | | | TEST | TEST | | | | File Uploaded | |
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C8 | | | | | TEST | TEST | | | | File Uploaded | |

Figure 17: Data Upload - Validation.

The screenshot shows the CALIDUS Jobs interface. At the top, it says "Logged in as: Administrator for Site: TEST" and "Log Out". Below that is a search bar with "Find" and "New" buttons. The main area is titled "Current Jobs" and contains a table with the following columns: Load, Job, Type, Group, Customer Ref., Job Code, Service Level, Planned, Actual, Arrival, Status, and Customer. The data in the table is as follows:

| Load | Job | Type | Group | Customer Ref. | Job Code | Service Level | Planned | Actual | Arrival | Status | Customer |
|--------------|------------|----------|-------|---------------|----------|---------------|------------------|---------|---------|---------|-------------------------|
| YTE-0010844T | TRT004A09Q | Delivery | TEST | CR7 | JOBCODE7 | | 10/07/2014 09:01 | 0 00:00 | | Pending | J Smith0000000000000000 |

At the bottom, it says "Showing 1 to 1 of 1 entries" and has "Previous" and "Next" buttons.

Figure 18: Job Details - Load One.

| Current Jobs | | | | | | | | | | | |
|---|------------|----------|-------|---------------|----------|---------------|------------------|---------|---------|---------|-------------------------|
| <input type="button" value="Select Columns"/> <input type="text" value="Search:"/> <input type="button" value="Show 10 entries"/> | | | | | | | | | | | |
| Load | Job | Type | Group | Customer Ref. | Job Code | Service Level | Planned | Actual | Arrival | Status | Customer |
| YTE-0010844U | TRT004A09R | Delivery | TEST | CR8 | JOBCODE8 | 1 | 10/07/2014 09:01 | 0 00:00 | | Pending | J Smith0000000000000000 |
| Showing 1 to 1 of 1 entries | | | | | | | | | | | |
| <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="Next"/> | | | | | | | | | | | |

Figure 19: Job Details - Load Two.

1.4.5 Modifying and Re-uploading loads

If a job is at status 'Pending' or 'Assigned' then it is possible to modify the details of that job by uploading another file.

For example the Customer Reference field could be modified for 'JOBCODE8' from the original 'CR8' to 'CR8v2' using the data below:

```
,,,,User2,JOBCODE8,CR8v2,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C8,,,TEST,TEST,,
```

Example 7: Single Job, Updating Customer Reference information.

| 8 | col9 | col10 | col11 | col12 | col13 | col14 | col15 | col16 | col17 | col18 | col19 | col20 | col21 | col22 | col23 | col24 | col25 | col26 | col27 | col28 | col29 | col30 | col31 | Validation Reason for Failure |
|---|----------|-------|----------|-------|---------|-------------------------|-------|-------|--------|---------|------------|-------|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------------------------------|
| | 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Wimbledon Street | | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C8 | | | | | TEST | TEST | | | | File Uploaded |

Figure 20: Data Upload - Validation.

Figure 21: Job Details - Updated Information.

1.4.6 Moving Jobs to a new load

It is possible to swap a Job from one Load to another Load by changing the user and load data. In order to do this, we have to specify the load id the jobs will belong to.

Firstly, we create a new load with three jobs by assigning them all to the same load 'LOAD1':

```
,,,User1,JOBCODE9,CR9,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J
Smith,01234,jsmith@gmail.com,C9,,,,,TEST,TEST,Load1,
```

```
,,,User1,JOBCODE10,CR10,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J
Smith,01234,jsmith@gmail.com,C10,,,,,TEST,TEST,Load1,
```

```
,,,User1,JOBCODE11,CR11,D,,10072014,901,10072014,901,J Smith,1 High
Street,Wimbledon,,,London,W12 8TZ,Mr J
Smith,01234,jsmith@gmail.com,C11,,,,,TEST,TEST,Load1,
```

Example 8: Three Jobs, Single Load.

| col9 | col10 | col11 | col12 | col13 | col14 | col15 | col16 | col17 | col18 | col19 | col20 | col21 | col22 | col23 | col24 | col25 | col26 | col27 | col28 | col29 | col30 | col31 | Validation | Reason for Failure |
|----------|-------|----------|-------|---------|---------------|-----------|-------|--------|---------|------------|-------|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|------------|--------------------|
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C9 | | | | TEST | TEST | Load1 | | | File Uploaded | | |
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C10 | | | | TEST | TEST | Load1 | | | File Uploaded | | |
| 10072014 | 901 | 10072014 | 901 | J Smith | 1 High Street | Wimbledon | | London | W12 8TZ | Mr J Smith | 01234 | jsmith@gmail.com | C11 | | | | TEST | TEST | Load1 | | | File Uploaded | | |

Figure 22: Data Upload - Validation.



Figure 23: Job Details - Load One.

Then if we change the load of one of the records and re-upload it, the record will be moved to a different load:

,,,User2,JOBCODE10,CR10,D,,10072014,901,10072014,901,J Smith,1 High Street,Wimbledon,,,London,W12 8TZ,Mr J Smith,01234,jsmith@gmail.com,C10,,,TEST,TEST,Load2,

Example 9: Existing Job, New User, New Load.

Figure 24: Data Upload - Validation.

Job code 'JOBCODE10' is now assigned to 'Load2':



The screenshot shows a 'Current Jobs' table with one entry:

| Load | Job | Type | Group | Customer Ref. | Job Code | Service Level | Planned | Actual | Arrival | Status | Customer |
|-------|------------|----------|-------|---------------|-----------|---------------|------------------|---------|---------|---------|-----------------------|
| Load2 | TRT004A09T | Delivery | TEST | CR10 | JOBCODE10 | | 10/07/2014 09:01 | 0:00:00 | | Pending | J Smith00000000000001 |

Showing 1 to 1 of 1 entries

Figure 25: Job Details - Load2.

'Load 1' now consists of only two jobs:

The screenshot shows a 'Current Jobs' table with one entry:

| Load | Job | Type | Group | Customer Ref. | Job Code | Service Level | Planned | Actual | Arrival | Status | Customer |
|--------------|------------|----------|-------|---------------|----------|---------------|------------------|---------|---------|---------|-----------------------|
| YTE-00108440 | TRT004A09K | Delivery | TEST | CR2 | JOBCODE2 | | 10/07/2014 09:01 | 0:00:00 | | Pending | J Smith00000000000000 |

Showing 1 to 1 of 1 entries

Figure 26: Job Details - Load1.

Note that a job that is added to an existing load will be added with the highest sequence number, so that job will be the last job to be processed on the device.

1.4.7 Sequencing Jobs on a new load

If multiple jobs are added to a load, the sequence the jobs appear on the device can be determined by setting a Site level parameter.

Within the Site Maintenance screen, in the Admin tab there is a 'CSV Upload Sequence' list:

The screenshot shows the 'Import/Export' tab of the Site Maintenance interface with the following settings:

- Auto Generate Loads:** Enabled (checkbox checked)
- Loads Unique within System:** Enabled (checkbox checked)
- Remove Unspecified Jobs from a Load:** Enabled (checkbox checked)
- Jobs Unique within Load:** Enabled (checkbox checked)
- Allow Blank Load:** Enabled (checkbox checked)
- Import Create Standing Data:** Enabled (checkbox checked)
- CSV Upload Sequence:** Default (dropdown selected)
 - Only export the job if all photos are complete (checkbox checked)
 - Do not include Photos (checkbox checked)
- WEBFLEET:**
 - WEBFLEET Update Job Start
 - WEBFLEET Update Job Arrival
 - WEBFLEET Update Job End

Figure 27: Site Maintenance - CSV Upload Sequence setting.

The value 'Default' will cause the jobs to be added in the order of the Load Planned Start Date/Time passed in, e.g.



columns 1 and 2.

The value 'Order Provided' will cause the jobs to be added in the sequence they are included in the file.

1.5 Example Files

The following list links to the example files used in this user guide.

- [File:Example1.csv](#)
- [File:Example2.csv](#)
- [File:Example3.csv](#)
- [File:Example4.csv](#)
- [File:Example5.csv](#)
- [File:Example6.csv](#)
- [File:Example7.csv](#)
- [File:Example8.csv](#)
- [File:Example9.csv](#)

