Order Upload - TMS

Contents

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The header section will allow the upload of an Order CSV file into *Calidus* TMS:

Customer
Customer CUST ACUSTOMER A ∨

Upload File
Choose file   pc.csv   **Clear** **Upload**

? **Customer** - A drop-down based on the users' visibility of customers. This will control the visibility of the CSV files in the main section and the customer used against the uploaded orders.

? **Upload File** - this will allow the user to upload a new CSV file through their browsers standard file selection box. Only files with an extension of 'csv' will be found in the file selection window. The file **must** conform to the *Calidus* TMS CSV upload format, and **will not** be validated at the upload stage on the *Calidus* Portal.

Underneath this will be a parameters section which includes a set of filters for finding existing file uploads:

Parameters
Upload Date **From** 01-Jan-22 **To** 04-Apr-23 **Status** All ∨ **Find**

? **Upload Date** (Range) - the date the file was originally uploaded. The default for both the From/To will be the current date

? **Upload Status** - either 'All', 'PENDING', 'SUCCESS' or 'FAILED'.

The default status will be 'All'.

? '**Find' Button** - to display the files for the above selection.

The main section will display the found orders based on the above selection criteria. Initially, all CSV uploads for the current day (and selected customer) will be displayed in descending order of Upload date i.e. newest to oldest.

			No. Orders			
ID	**Filename**	**Upload Date/Time**	**Success**	**Failed**	**Status**	
220412112233	pj02010892-7.csv	12-APR-22 13:22	0	0	FAILED	Labels
220412111305	pj02010892-7.csv	12-APR-22 13:13	1	0	SUCCESS	Labels
220412105649	pj02010892-6.csv	12-APR-22 12:56	1	0	SUCCESS	Labels
220412104911	pj02010892-6.csv	12-APR-22 12:49	1	0	SUCCESS	Labels
220412104226	pj02010892-5.csv	12-APR-22 12:42	0	0	FAILED	Labels
220401120356	pj02010892-5.csv	01-APR-22 14:03	0	0	FAILED	Labels
220401115958	pj02010892-5.csv	01-APR-22 14:00	1	0	SUCCESS	Labels
220401113329	pj02010892-4.csv	01-APR-22 13:33	0	3	FAILED	Labels
220401112454	pj02010892-3.csv	01-APR-22 13:24	0	0	FAILED	Labels
220401112120	pj02010892-2.csv	01-APR-22 13:21	0	0	FAILED	Labels
220401111540	pj02010892-1.csv	01-APR-22 13:15	0	0	FAILED	Labels
220401111027	pj02010892-1.csv	01-APR-22 13:10	0	0	FAILED	Labels

- **Id** - the unique ID generated by the *Calidus* Portal during the file upload
- **Filename** - the uploaded filename
- **Upload Date/Time** - the date/time the file was uploaded onto the *Calidus* Portal
- **No. Orders Success** - the number of orders processed in the file (only visible if the status is *not* 'PENDING')
- **No. Orders Failed** - the number of orders processed in the file (again only visible if the status is *not* 'PENDING'
- **Status**:
  - 'PENDING' - The file has been uploaded by the *Calidus* Portal but not yet processed on *Calidus* TMS
  - 'SUCCESS' - The file has been loaded into *Calidus* TMS with no errors
  - 'FAILED' - At least one order was not successfully loaded into *Calidus* TMS.
- **Labels** - this will be a button which will call a *Calidus* TMS report to produce multiple labels for all SUCCESS orders uploaded within the selected file.

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For FAILED CSV files, clicking on the line will open a window with details of the error(s):

Error Details: 220401112454				
detail id	line number	external ref	level	error message
233	1	BRADSHAW	ORD	Collection location id does not exist, missing address information to create a valid address.

The details will contain: Detail Id, Line Number, External Ref, Level (Order, Line or Item) and Error message

If a CSV file partially fails, all lines that have successfully been processed will create orders within Calidus TMS, failed lines will have to be re-sent back through the Calidus Portal *within a NEW file. Orders that originally failed can be re-sent in the new file using the original reference number and order details with the errors fixed within the order.*

If CSV file completely fails, then as long as the file/order errors are fixed the same file can be re-sent via Calidus Portal *to be reprocessed.*

1.1 Order Upload Process

The configuration for the order upload can be found in the *Calidus* Portal Setup page:

Module	Section	Key	Admin	Description	Value
	TMS - ORD_UPLOA ∨		∨		
TMS	TMS - ORD_UPLOAD	DIR	N	Directory to put the files in	
TMS	TMS - ORD_UPLOAD	IP	N	IP of TMS machine to put files	
TMS	TMS - ORD_UPLOAD	LABEL_URL	N	URL for the label	
TMS	TMS - ORD_UPLOAD	PASS	N	Password for TMS Machine	
TMS	TMS - ORD_UPLOAD	USER	N	User for TMS Machine	

From the Order Upload page, the user will select the file through their browsers standard file selection box. The *Calidus* Portal will then create a record on the *Calidus* TMS table IMP_HIST_HEADER then upload and transfer the file onto the *Calidus* TMS machine via an FTP process.

The import history header record will be created and the HIST_HEADER_ID will be set to the next sequence value. The *Calidus P*ortal will also stamp the current date/time to when the import started and update the filename with the file being uploaded. The status will be set to 'PENDING' and the processed; success & failed fields will have default values of zero.

Once FTP'd, the file will remain in the *Calidus* TMS inbound directory until picked up by the scheduled *Calidus* TMS import process.

Once *Calidus* TMS has processed the file the *Calidus* TMS system will update the status of the IMP_HIST_HEADER record and populate the IMP_HIST_DETAIL table if any errors occurred.

The HIST_HEADER_ID will be assigned to each order created within the Source Ref column.

Once the import has completed on the *Calidus* TMS system the IMP_HIST_HEADER will be updated with the status of either 'SUCCESS' or 'FAILED', as well as the number of orders processed, and counts of which were either successful or failed.

Any orders that fail will have an associated record insert into the IMP_HIST_DETAIL table with the linking HIST_HEADER_ID, relevant line number and orders details as well as the error that occurred while trying to process the order.

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