



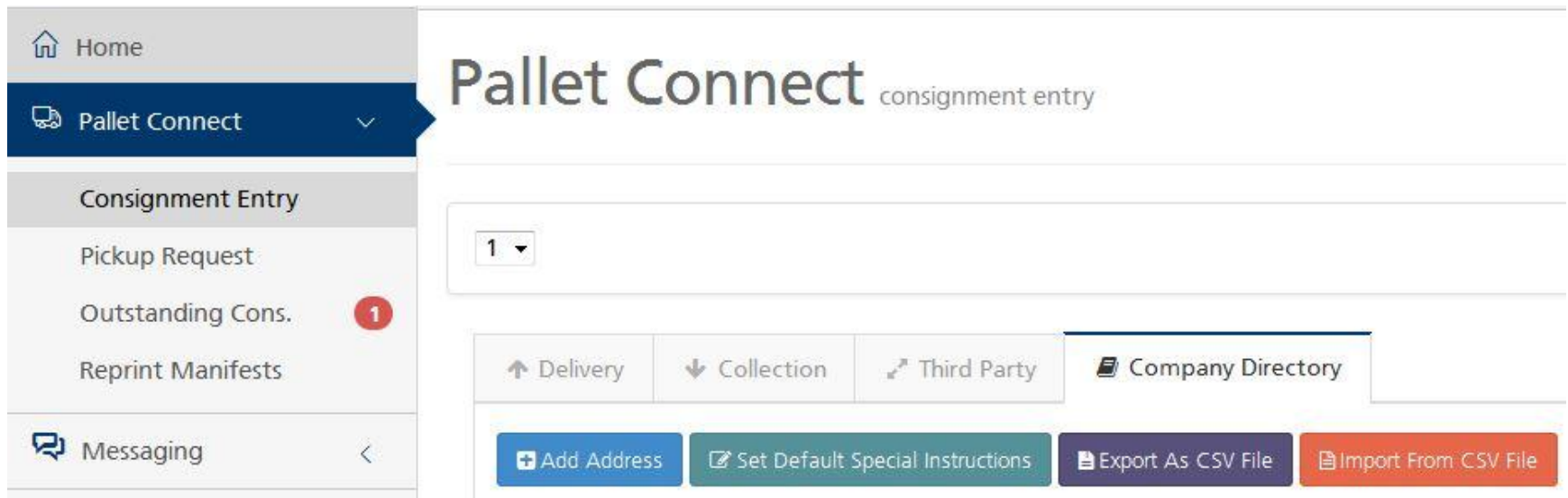
Palletways Portal

Address Import/Export Guide

Palletways Portal

Pallet Connect> Address Management

The company directory displays all of your saved addresses on the Portal. This can be edited and individual address settings saved – such as special instructions or always use a tail lift vehicle etc



The screenshot shows the Palletways Portal interface. On the left is a navigation sidebar with the following items: Home (house icon), Pallet Connect (truck icon, highlighted with a dark blue bar and a dropdown arrow), Consignment Entry, Pickup Request, Outstanding Cons. (with a red circle containing the number 1), Reprint Manifests, and Messaging (speech bubble icon, with a left arrow). The main content area is titled "Pallet Connect" with the subtitle "consignment entry". Below the title is a dropdown menu showing "1". Underneath are four tabs: "Delivery" (upward arrow icon), "Collection" (downward arrow icon), "Third Party" (forklift icon), and "Company Directory" (document icon, which is the active tab). At the bottom of the main area are four buttons: "Add Address" (blue with a plus icon), "Set Default Special Instructions" (teal with a pencil icon), "Export As CSV File" (dark blue with a document icon), and "Import From CSV File" (orange with a document icon).

The company directory can be exported and also imported in a CSV format. This allows you to enter large amounts of addresses you may already have in your own systems. The export file will be generated and saved in your downloads directory in the following format: company_directory_20150902_090319.csv

Palletways Portal

Pallet Connect> Address Import / Export

The Company Directory CSV Import file is made up of the following fields:

- 1 - id_DoNotChange - keep the ID to update the current address, leave blank to create a new address entry
- 2 - Contact - Name of address contact
- 3 - Company - Company name (used as a search reference in the Consignment Entry screen)
- 4 - Company_Code (used as a search reference in the Consignment Entry screen)
- 5 - Address_Line_1
- 6 - Address_Line_2
- 7 - Address_Line_3
- 8 - Address_Line_4
- 9 - Town
- 10 - Town_2
- 11 - County
- 12 - Country_Code - Uses ISO country code: GB for Great Britain
- 13 - Postcode - Full postcode required, will not accept an incomplete entry (used as a search reference)
- 14 - Telephone - Phone number required for deliveries
- 15 - Fax
- 16 - Handball - yes or no (Handball service enabled if pallet contents are required to be delivered by hand)
- 17 - Taillift - yes or no (Taillift service enabled if no FLT is available at delivery point)
- 18 - Special_Instructions (List of specific instructions require at this address location)
- 19 - Collection_Address yes or no (Enables the address to be a collection point for the customer)
- 20 – Use default special instructions (Will use the default instructions set at account level)
- 21 – Confirmation Email (Email address to receive consignment booking confirmation)
- 22 – Tracking email (Email address to receive status notification updates / tracking link)
- 23 – Tracking SMS (SMS number for “Out for delivery” notification)
- 24 – Tracking events (Consignment notification trigger events)

Palletways Portal

Pallet Connect > Address Import / Export

Import Company Directory From CSV

You can use this page to import a CSV (Comma Separated Values) file into your company directory.

The CSV file **must** conform to the format as detailed in the [Address Import Guide](#). Please read the information in this guide before proceeding.

Select CSV file to import

Summary of import

Total addresses	354
Addresses imported successfully	344
Addresses skipped	10
Addresses created	0
Addresses updated	0
Addresses unchanged	344

Import exceptions

Copy CSV Excel PDF Print

Row number	Address ID	Description
5	13168948	Field Company must be at least 2 characters long. Address skipped.
7	13168950	Field Company must be at least 2 characters long. Address skipped.
9	13168952	Field Company must be at least 2 characters long. Address skipped.
16	4500778	Field Address_Line_1 must be at least 2 characters long. Address skipped.
43	4500872	Field Company must be at least 2 characters long. Address skipped.

Select CSV – Opens a window to locate required import file

Summary – Lists a break down of the import routine with the number of entries processed

Exceptions – Lists the failed imported addresses with the reason why its not been accepted

Palletways Portal

Pallet Connect> Address Import / Export

Import file can be edited in any text editor or spreadsheet application. To edit in Microsoft Excel please do the following:

Open CSV file in your spreadsheet editor (Microsoft Excel, Openoffice Calc etc)

If there is an import wizard - select delimited formatting

Choose comma as the delimiting factor

Make sure any column containing numbers (Telephone) is set to text, Excel will otherwise strip any leading zeros

Click Finish

Example output of the CSV file here:

```
id_DoNotChange,Contact,Company,Company_Code,Address_Line_1,Address_Line_2,Address_Line_3,Address_Line_4,Town,Town_2,County,Country_Code,Postcode,Telephone,Fax,Handball,Taillift,Special_Instructions,Collection_Address,Use_Default_Instructions,Confirmation_Email,Tracking_Email,Tracking_SMS,Tracking_Events  
4336275,,"IT Test",,"Palletways UK  
Ltd",Fradley,,,LICHFIELD,,STAFFORDSHIRE,GB,"ws138ne",,,,no,no,,yes,yes,user@palletways.com,user2@palletways.com,,
```

Make sure the header entries are listed in the import file.