HOW TO BULK CREATE SHIPMENTS

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Consolidate and upload large volumes of shipments in one action

Save time and improve efficiency. Ideal if you create a high number of consignments regularly. Upload all your shipping information as a MyToll supported excel file and MyToll will do the rest - validate, manifest and print shipping documents.

SETTINGS	UPLOAD SHIPMENTS	UPLOAD HISTORY	ERROR HANDLING

This document provides a guide to bulk upload setting configuration, bulk upload Shipments, upload history and error handling.

CONFIGURE BULK CREATE SETTINGS

1. Select **BULK CREATE SETTINGS** from the **BULK CREATE** menu option

2. Bulk create **SETTINGS** page will appear with default settings

   Note: These settings are available to configure only if the user is not part of a group. For users within a group, the Group Admin is responsible for the configuration of the settings (and cannot be altered by the user).

3. Configurable settings include:

   3.1. **GENERAL SETTINGS** - only applicable to shipments
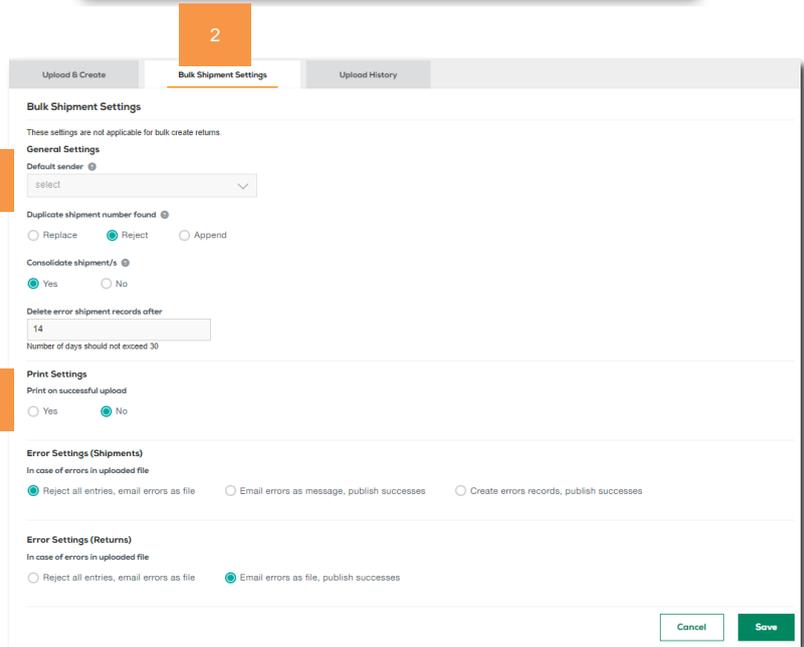
Setting	Description
Default sender	Specify a default Sender to consider when shipment files are being imported without providing the Sender is in the file
Duplicate shipment number found	Indicate the action to be taken when importing a shipment that has the same shipment ID which is already existing in MyToll database.
Consolidate Shipment/s	Specify whether the shipments need to be consolidated
Delete error shipments after	Specify the duration (days) for how long error shipments should be kept in MyToll. The duration should be 30 days or less.

   3.2. **PRINT SETTINGS** - Available only if you have installed **Advanced Print Client** and have an **active print profile with Smart Print enabled** for labels and shipments.

Setting	Description
Print on successful upload	Specify whether the relevant shipment documents should be printed on successful upload
Print documents	Indicate what documents should be printed if "Print on successful upload" is set to "Yes"
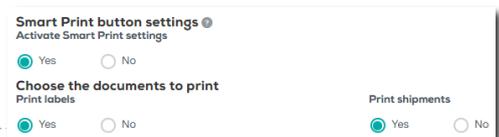
3.3 *ERROR SETTINGS for SHIPMENTS*

Setting	Description
Reject all entries, email error as file	When there are one or more errors in the upload file, reject all the shipments and email a file with error shipments
Email errors as file, publish success	When there are one or more errors in the upload file, publish the shipments with no errors to Shipment Tab and email a file with error shipments
Create error records, publish success	When there are one or more errors in the upload file, allow to create the error shipments and publish only the shipments with no errors to Shipment Tab. Error shipments can be accessed from Upload History tab

BULK UPLOAD SHIPMENT FILE

1. Go to **UPLOAD & CREATE** tab

2. Download **SHIPMENTS TEMPLATE**

   Refer the Shipment guidelines document for details on completing the Shipments file.
   A sample shipment template can be found here.

3. Select **UPLOAD TYPE** as **SHIPMENTS** and upload the file

   Note: A message displays advising the file type and format has been checked. Once successful, the file upload will commence.

4. Once your **FILE IS PROCESSED**, MyToll notifies you via the dashboard. Click the bell icon to view the notifications:
   - Bulk create shipments – **partially created** (displaying number of records successfully created) OR
   - Bulk create shipments – **successful** (displaying number of records successfully created) OR
   - Bulk create shipments – **failed**

   Note: MyToll validates the data in the upload file. If any errors identified, depending on the settings, shipment creation will fail, or partial shipments will be created.

5. Manage Shipments successfully created
   Shipments successfully created displays in the **SHIPMENTS tab** on the **DASHBOARD**. Print/reprint labels and perform other actions as required. Manage your manifests and/or book pickups from the manifest tab.

VIEW UPLOAD HISTORY

6. The *UPLOAD HISTORY* tab on the *BULK UPLOAD SCREEN* provides a list of view of all your imports, including the status, date and time of upload, and even access to download the success and error files.
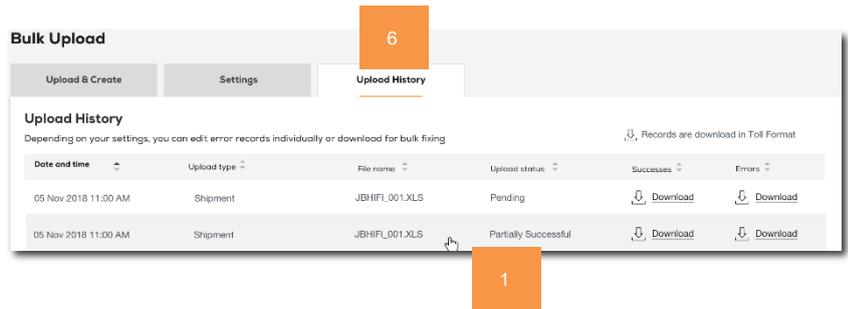
ERROR HANDLING IN MYTOLL

Clicking on any *SHIPMENT* error record in the *UPLOAD HISTORY* tab will allow you to correct the data in MyToll.

1. Click an *UNSUCCESSFUL* or *PARTIALY SUCCESSFUL* record

   The screen will reload and display a list of all *SHIPMENTS* that contain errors.

2. Click *SHIPMENT ID* to open a shipment with errors.

   The shipment will open in the Create Shipment screen in a new browser tab.

3. Correct the *ERRORS HIGHLIGHTED,* then *PRINT & CLOSE* the shipment
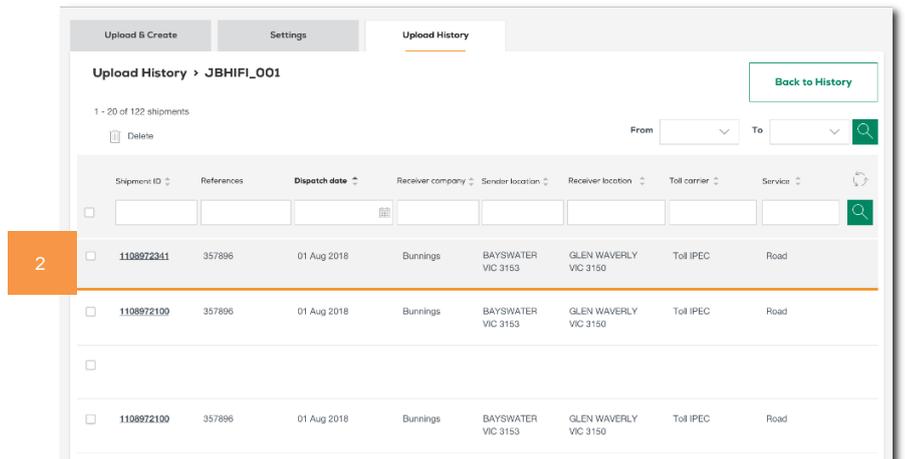
ERROR HANDLING - CORRECT & UPLOAD FILE

If the shipment creation fails, you are notified via the dashboard as well as receiving an email with the Shipment file attached. Error details get recorded in a separate column (Column A).

4. Open the file and *REVIEW ERRORS* in column A

   Dependent on error settings the error file will only display error records.

5. Fix all *ERRORS*

6. Delete the *ERROR COLUMN A*

7. *SAVE* the file (xls)

8. *UPLOAD* your Shipment file on MyToll
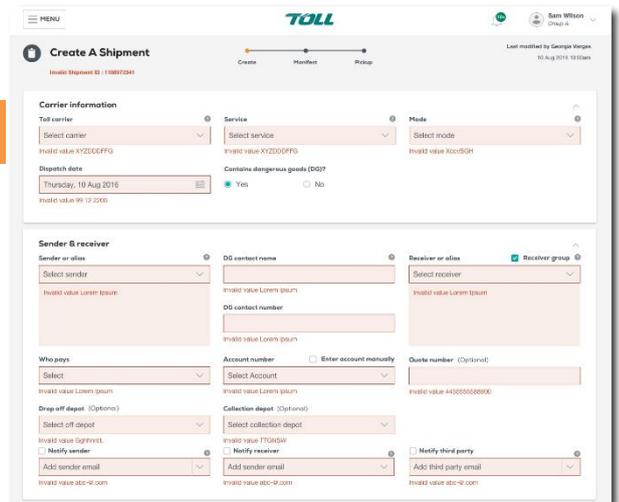
Refer to Bulk Upload Shipment File section in this document.

RECOMMENDATION:
Quick Reference Guide
How to track your shipment

For more Help and Tips visit **mytoll.com**

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