



APC Guide to using the New Horizon
Custom CSV
Version <1.0.2>



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1. Overview

The New Horizon Custom CSV allows users to map and upload CSV order files or address book records to the New Horizon system.

The following guide will provide step by step instructions on how to create a DataPlug for mapping CSV files, and how to then upload your CSV order or address book files to that DataPlug.

1.1 Custom CSV Fields

Below is a list of all the possible fields that can be mapped for a Custom CSV. Some fields are mandatory for a Custom CSV file, and therefore need to be mapped before a user can start uploading files.

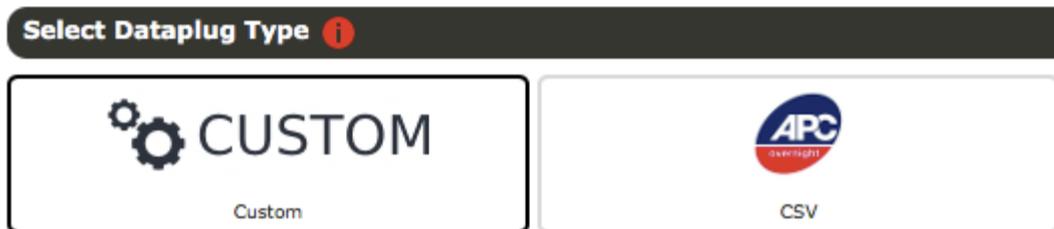
Field	Mandatory	Unmapped Default Value
Collection Company/Name	No	Operational Company/Name
Collection Address Line 1	No	Operational Address Line 1
Collection Address Line 2	No	Operational Address Line 2
Collection City	No	Operational City
Collection County	No	Operational County
Collection Postcode	No	Operational Postcode
Collection Country	No	Operational Country
Collection Contact Name	No	Operational Contact Name
Collection Phone	No	Operational Phone
Collection Email	No	Operational Email
Collection Date	No	Today's Date
Ready At	No	Opening Time
Closed At	No	Closing Time
Reference Number	No	No Automatic default
Delivery Company/Name	Yes	No Automatic default
Delivery Address Line 1	Yes	No Automatic default
Delivery Address Line 2	No	No Automatic default
Delivery City	Yes	No Automatic default
Delivery County	No	No Automatic default
Delivery Postcode	Yes	No Automatic default
Delivery Country	No	Default set to the United Kingdom
Delivery Contact Name	Yes	No Automatic default
Delivery Phone	Yes	No Automatic default
Delivery Mobile Phone	No	No Automatic default
Delivery Email	No	No Automatic default
Special Instructions	No	No Automatic default

Items	No	No Automatic default
Weight	Yes	No Automatic default
Service	No	No Automatic default
Security	No	Not Security
Fragile	No	Not Fragile
Insurance Liability	No	No Automatic default
Goods Description	No	No Automatic default
Item Type	No	All
Height	Yes	No Automatic default
Length	Yes	No Automatic default
Width	Yes	No Automatic default
Value	Yes	No Automatic default
Shipper Order Confirmation	No	No
Recipient Order Confirmation	No	No
Sender Delivery Confirmation	No	No
Recipient Delivery Confirmation	No	No
Delivery Group	No	All

Height, width, length and value should only be mandatory if it is set to be mandatory at customer level.

2. Creating and Mapping a DataPlug

To start uploading CSV files, users first need to create a DataPlug in order to map their format of CSV files. To do this go to My Uploads > DataPlugs on the right-hand menu. You will be presented with a screen like this.



After selecting Custom CSV's, you will need to upload an example file containing less than 150 orders. Once the file is attached click next and you will be taken to a setup screen. On the first page, you will need to select whether the file contains a header row. This is important as this will tell the system to either process or ignore line 1. Once this is selected clicking next will allow you to set the delimiter of the file. This is typically a comma. After selecting the delimiter, the preview will update. You should ensure the file is formatted correctly before proceeding as once saved neither of these options can be changed.

Note: If opening text or CSV files in excel and then saving, leading zeros may be lost e.g. in telephone number fields. This can cause validation errors on importing the file.

3. Define field delimiter

Delimiter

Other Delimiter

Treat consecutive delimiters as one

Text qualifier

Preview of Uploaded CSV file:

1	Delivery Company Name	Delivery Address Line 1	Delivery Address Line 2	Delivery Postcode	Delivery City	Delivery Country	Delivery Contact Name	Delivery Phone	Mobile
2	Plambee	86 Boyd Plaza		Ox1 2WE	Rochdale	United Kingdom	Isidoro Sporle	01993 408756	750622
3	Yakidoo	57123 Mendota Trail		SK10 3MG	Bolton	United Kingdom	Griz Christofle	01993 408756	720221
4	Fadeo	28 Towne Plaza	Tennyson	KT8 8ZH	Bolton	United Kingdom	Livvie Celez	01993 408756	795074
5	Skinte	15646 Hanover Court	Bunker Hill	LN3 4JJ	Trafford	United Kingdom	Carmine Morsom	01993 408756	761101

Once you are happy with the preview of this file clicking next will take you to the mapping screen.

The screenshot displays the 'Dataplugs' configuration page in the HYPASHIP system. The interface includes a sidebar with navigation options and a main content area for configuring a specific 'Dataplug'. The 'Dataplug' configuration includes fields for 'Dataplug Name' (Dims), 'Description', and 'Version' (1). Below this is a 'Columns Field Mapping' table with 13 columns. Each row in the table has dropdown menus for 'Column Name', 'Destination Field Name', 'Field Type', and 'Field Format', and a text input for 'Default Value'.

Column	Column Name	Destination Field Name	Field Type	Field Format	Default Value
1	Delivery Company Name	Delivery Company Name	Text	Please select...	
2	Delivery Address Line 1	Delivery Address Line 1	Text	Please select...	
3	Delivery Address Line 2	Delivery Address Line 2	Text	Please select...	
4	Delivery Postcode	Delivery Postcode	Text	Please select...	
5	Delivery City	Delivery City	Text	Please select...	
6	Delivery Country	Delivery Country	Text	Please select...	
7	Delivery Contact Name	Delivery Contact Name	Text	Please select...	
8	Delivery Phone	Delivery Phone	Text	Please select...	
9	Declared Weight	Item Declared Weight	Decimal Number	123,456.78	
10	Length	Item Declared Length	Text	Please select...	
11	Height	Item Declared Height	Text	Please select...	
12	Width	Item Declared Width	Text	Please select...	
13	No. Items	Please select...	Integer Number	Please select...	

Here you can name your DataPlug and map the columns you need from the file into the correct HypaShip fields. The system will attempt to map your fields automatically if your file contains a header row. It is worth double checking this as the system is not always accurate. Where the system hasn't suggested a mapping or is incorrect users are able to use the dropdowns to select a mapping destination. The field type column is always set based on the destination field name.

For fields such as Date and Logical fields such as security, it is important to ensure the format is correct as incorrect formats will lead to errors when uploading the file. This also applies to phone number fields which should be text, not integer fields.

Note: Ensure fields are not mapped twice as this will generate an error when you save.

Once you are happy with the mapping pressing save will allow you to use the data plug to upload files.

Default Values

A number of fields will automatically have default values added if they are not supplied in the file. These have been provided in the table in section 1.1. For other fields without a default value, or if you wish to use a different default value these can be added in the text field (or selected in the drop-down if country or date). The system will use this default value if the row for that column contains no default value.

3. Using DataPlugs

Once you have created a DataPlug you can use it by going to My Uploads > Manual Uploads. Simply select the DataPlug you wish to use and select the file either using the browse function or drag and drop.

Once uploaded you can view the progress of the file in File overview.

4. File Overview

Once a File has been uploaded it will appear in file overview. Whilst uploading it will have a status of Pending (N of N) Depending on the current use of the system it can take up to a few minutes for the file to process. Once completed the file will have a completed status of either Success, Failed, Partial Upload, Read with Warnings or Read with Errors. Clicking on the detail button will allow you to see any orders that have failed or have had corrections made. These statuses are covered below in more detail.

5. File Statuses

When importing orders, the following statuses will show:

Success:

All orders were uploaded successfully and are awaiting printing.

Failed:

All orders failed to upload. This could be due to a number of reasons and the reason for failure will be shown under detail.

Partial Upload:

Some Orders uploaded successfully whilst others failed. For the orders that failed reasons will be shown under detail.

Read with Warnings:

Due to limitations on printing special characters (e.g. å ä è é etc.) the system will attempt to replace these with standard English characters (e.g. à â ä > a, æ > ae, è é > e etc.) These orders will get a status of Read with Warnings and the replaced characters will be shown under detail.

Read with Errors:

When an order fails for certain reasons (such as an invalid phone number or postcode) the system will fail the order but will import it, allowing you to correct any and all issues on screen. If preferred, you can still use the Failed Upload option to bulk replace CSV Files.

6. Replace Failed Upload.

For Large files with lots of failures, it is often impractical to edit each order on the screen. As such it is possible to edit orders in the CSV file and re-upload it. To avoid creating duplicate orders you can select a file to replace.

Note: If you do not choose to replace the previous upload you will generate duplicate orders which will need to be manually deleted.

To do so upload an order normally by selecting the corrected file and the DataPlug and use the Replace failed upload section that appears after selecting the DataPlug. The system will ignore any order with a status of Success or Read with Warnings. And replace any order with a status of Failed or Read with Error.

In file overview, the system will replace the last upload rather than create a "New File"

7. Support

If you require any further assistance, please don't hesitate to contact your local depot or trainer.