

2ic Pallets allows you to import trading partners from other applications including CHEPMate STAR, CHEP BlueTrack, CHEP Portfolio+PLUS, CHEP WinETA and Loscam HMS as well as custom lists from Microsoft Excel.

	Step	Comments
	1. What program are you importing from? CHEPMate STAR ► Go to step 2 CHEP BlueTrack ► Go to step 8 CHEP Portfolio+PLUS Asia-Pacific ► Go to step 13 CHEP Portfolio+PLUS Europe-Americas ► Go to step 22 CHEP WinETA ► Go to step 31 Loscam HMS ► Go to step 31 Excel ► Go to step 29	If you are importing trading partners from more than one source, import the file with the largest number of trading partners first.
Preparing data from CHEPMate STAR	2. Open CHEPMate STAR. 3. In the list of functions on the left of the screen, select Admin, then Export Data. 4. In the Receiving Account field on the right of the screen, select your location. 5. In the Select Data to Send checkboxes, select Customer & Depot Details and deselect all other options. 6. Click on the Export button and save the file to a known location on your hard disk. 7. ► Go to step 31	CHEPMate STAR is a pallet control application provided by CHEP Australia. The file is in a format called comma separated values (*.csv)
Preparing data from CHEP BlueTrack	8. Open CHEP BlueTrack. 9. On the Enquiries and Support screen, select option 6, Alphabetical listing. 10. On the Alphabetical Listing screen, select 'A' for All Locations. 11. Press F4 to finish, then 'P' to Produce. The report is saved as a file to your hard drive. It is in the folder set up for receiving BlueTrack reports. 12. ► Go to step 31	CHEP BlueTrack is a pallet control application provided by CHEP in the UK and Ireland.
Preparing data from CHEP Portfolio+PLUS Asia-Pacific	13. Log in to CHEP Portfolio+PLUS at https://portfolioplus.chep.com . 14. Select the Orders and Transactions tab, then select Reports from the sub-menu.	

Procedure 3 Importing Trading Partners (continued)

	Step	Comments
	15. From the Detailed Navigation list, select Transaction History.	If this option is not visible, you may not have access permissions to view it.
	16. Select your location, specify a date range and, if required, select the equipment on which to report, then click Submit.	The report data is generated in a table.
	17. Right-click anywhere on the data and from the pop-up menu select Export as... then CSV file.	The data displays on screen as text separated by semi-colons.
	18. Right-click on the data and select Select All.	
	19. Right-click on the highlighted data and select Copy.	
	20. Open the Notepad application and select Paste, then save the file to a known location.	To launch Notepad click the Windows Start button, select Accessories then Notepad.
	21. ► Go to step 31	
Preparing data from CHEP Portfolio+PLUS Europe-Americas	22. Log in to CHEP Portfolio+PLUS at https://portfolioplus.chep.com .	
	23. Select the Orders and Transactions tab, then select Reports from the sub-menu.	
	24. From the Detailed Navigation list, select Transaction Report.	If this option is not visible, you may not have access permissions to view it.
	25. Select your location, the Report Name 'Other Party' and Sort By 'Other Party', then click Submit.	If the date fields are left blank, the report will contain data for the last 6 months. Note: Portfolio+PLUS Europe-Americas only contains records which have been keyed into Portfolio+PLUS, not imported records.
	26. At the bottom of the form, click the Download link then open the file in Microsoft Excel.	
	27. In Excel, click on the File menu and select Save As..., then save the file in CSV format to a known location.	
	28. ► Go to step 31	
Preparing data from Excel	29. In Excel, open the file containing a list of trading partners.	
	30. Save the Excel file to a known location on your hard disk in Comma Separated Values (*.csv) format.	
Importing trading partner records (all file types)	31. Open 2ic Pallets.	
	32. From the Main form, select the Operations tab then Import Data.	

Procedure 3 Importing Trading Partners (continued)

Step	Comments
33. Click on the Trading Partners tab.	
34. At the bottom left of the form, click on the Read Data button, then find and open the data file you require.	If you are importing from CHEPMate STAR, CHEP BlueTrack, CHEP Portfolio+PLUS or Excel, this will be the file you saved earlier. If you are importing from CHEP WinETA, open the database file with a name like Wineta001.mdb which is usually located in the folder C:\Program Files\CHEP New Zealand\WinETA. If you are importing from Loscam HMS, open the HMS.mdb file which is usually located in the folder C:\Program Files\HMS\DATA.
35. Click Yes to confirm that 2ic Pallets has correctly detected the type of file you are importing.	
36. If importing a custom list of trading partners from Excel, assign fields in the left section. There is one record in this section for each column in the import file. Note that 'Trading Partner' must be assigned to a column and for this record, also set Match to 'tp'.	As fields are assigned on the left, corresponding column headings are set for the displayed data on the right.
37. Click on the Check Data button to validate the imported data.	If you are prompted to fix missing or incorrect data then you need to check the records to which the message refers, otherwise a dialogue box displays, confirming that the data has been checked.
38. Click on the Save Records button to save the imported records into 2ic Pallets.	
