

## Exporting Transfers to the Supplier

	Step	Comments
<b>Set up the export and select a format</b>	1. From the Main form, select the Operations tab, then click Export Data.	
	2. Click on the empty row at the bottom of the data grid.	
	3. In the Date field, enter today's date.	
	4. In the Type field, select the file format to be exported.	This may be CEVA Logistics, CHEP Australia, CHEP Global, CHEP New Zealand, IPP Logipal, Loscam or LPR.
	5. In the Trading Partner field, select the name of the supplier trading partner to whom the file is being sent.	
<b>View the movements to be exported</b>	6. You can view the movements to be exported in the Transfers Off tab of the sub-form in the lower half of the screen. You can view a report of the assigned movements by clicking on the Formatted Report button in the button bar at the bottom of the form.	You can assign or unassign specific movements by ticking/unticking the Assign column for each movement, Untick Export to both unassign the movement and prevent it from being included in the next export batch.
	7. Click on the Export/Email Batch button. After checking the records, an email to the supplier is generated with the export file attached. Check the email then click Send.	If this is the first time you have exported a particular type, you will be asked where to save the file.  If the supplier prefers to receive files via FTP, then save the file into the FTP folder and cancel the email.

### Other export file types

- **3rd Party** – sends transactions involving a 3rd Party trading partner to that trading partner. Typically used for reconciling exchanges with a 3rd Party. All records between the Start Date and Date are included in the batch and cannot be excluded. It is common to send only your 'off' movements (equipment sent to the 3rd Party) and let them tell you what they've sent back.
- **CPC** – same as 3rd Party exports but for CPC equipment only. These files can also be created & emailed in bulk using the Create CPC Batches and Export/Email CPC Batches buttons that are visible when you are on the new record. The CPC system is based on pallet exchanges between members. These are not processed centrally and do not incur transaction based fees, but instead must be periodically reconciled with each of your 3rd Party trading partners. However reconciling is typically only done with larger volume trading partners. When generating export batches, others can be excluded using the override export fields in the TP Accounts form. Emails to CPC trading partners have two files attached – a CSV file so they can import & reconcile if they use 2ic Pallets and a formatted PDF of transactions, for those that reconcile manually.
- **Slave** – Used for exporting all movements and stocktakes (in 2 separate files) from a slave data file to a master data file. Slaves run independently of the master so they can be on a disconnected network. This option is used when there are multiple locations operating under the same supplier account. Movements & stocktakes included in the batch are those with a tick in the Slave Export box that do not already have a Slave Batch. If a record is edited after exporting, the Slave Batch field is cleared so it is re-sent on the next slave export and the master receives the updated details.
- **Summary** – Used for exporting 'summary' transactions from a regular account data file to a specially set up 'summary' data file. This is useful when you have separate accounts at each location but want to compare their performance in a 'summary' data file. The exported movements are totalled quantities. For example, if there are 15 transfer off movements for CHEP pallets on a particular day, a single record with the total quantity is written to the summary export file as a transfer off on that day. This minimises the volume of records in the summary data file, while still retaining enough information to compare the locations.