

User Guide

Shipping Import  
V21.1.0200

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EFI PrintStream | V21.1.0200 Shipping Import User Guide

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# Introduction

## Overview

This document discusses how shipping spreadsheets can be imported through PrintStream’s shipping module. It also explains formatting of the import, where data is held within PrintStream, and Excel formatting information.

## Contact Information

### EFI Support

<b>US Phone:</b>	855.334.4457 (First select option 3, then press option 8, then press option 1)
<b>US Fax:</b>	415.233.4157

**US E-mail:** [printstream-support@efi.com](mailto:printstream-support@efi.com)

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

**Note** For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

## Preparations for Shipping Import

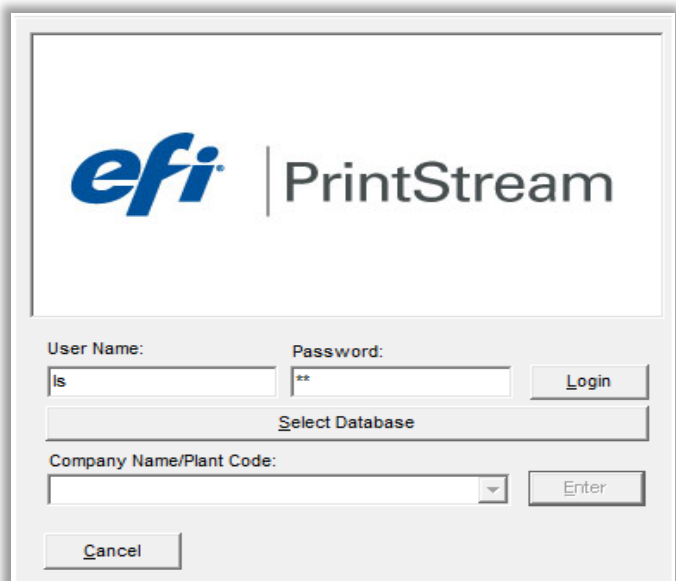
The following steps must be completed to prepare for importing shipments into PrintStream:

1. Open the import Data File
2. Open the Import File Template in Excel
3. Copy the information from the Data File and Paste into the corresponding fields in the Import File Template

**Note** For more information about the Import File Template and where data pulls into PrintStream, please refer to the Shipping Import File Information sections of this document (sections 6 & 7).

### Logging in to PrintStream

1. To open PrintStream, double-click the icon on your desktop.
2. Using your provided login and password, click **Login**, select your Company Name or Plant Code, and select **Enter**.

The image shows a login window for the PrintStream application. At the top, the 'efi' logo is on the left and the word 'PrintStream' is on the right, separated by a vertical line. Below the logo, there are two input fields: 'User Name:' with the text 'ls' and 'Password:' with two asterisks '\*\*'. To the right of the password field is a 'Login' button. Below these fields is a 'Select Database' button. Underneath that is a 'Company Name/Plant Code:' label followed by a dropdown menu and an 'Enter' button. At the bottom left of the window is a 'Cancel' button.

efi | PrintStream

User Name: Password:

ls \*\* Login

Select Database

Company Name/Plant Code:

Enter

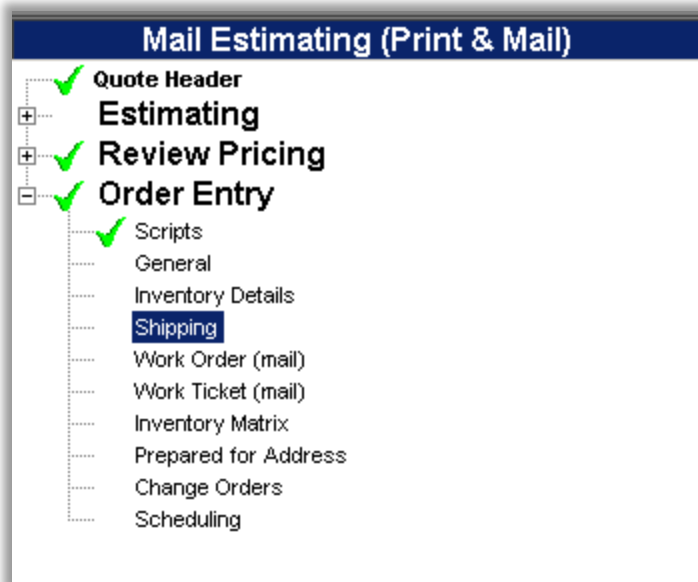
Cancel

## Shipping from Mail Estimating

1. Open Mail Estimating/Order Entry.



2. Open the job and expand Order Entry in the tree. Click **Shipping** to open the Shipping module.

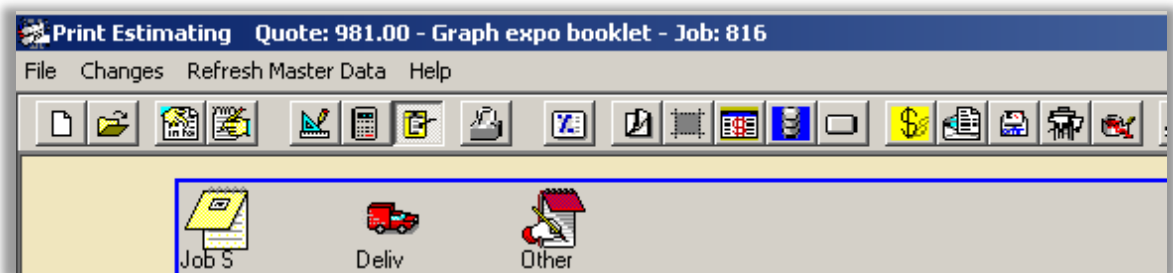


## Shipping from Print Estimating

1. Open Print Estimating / Order Entry.

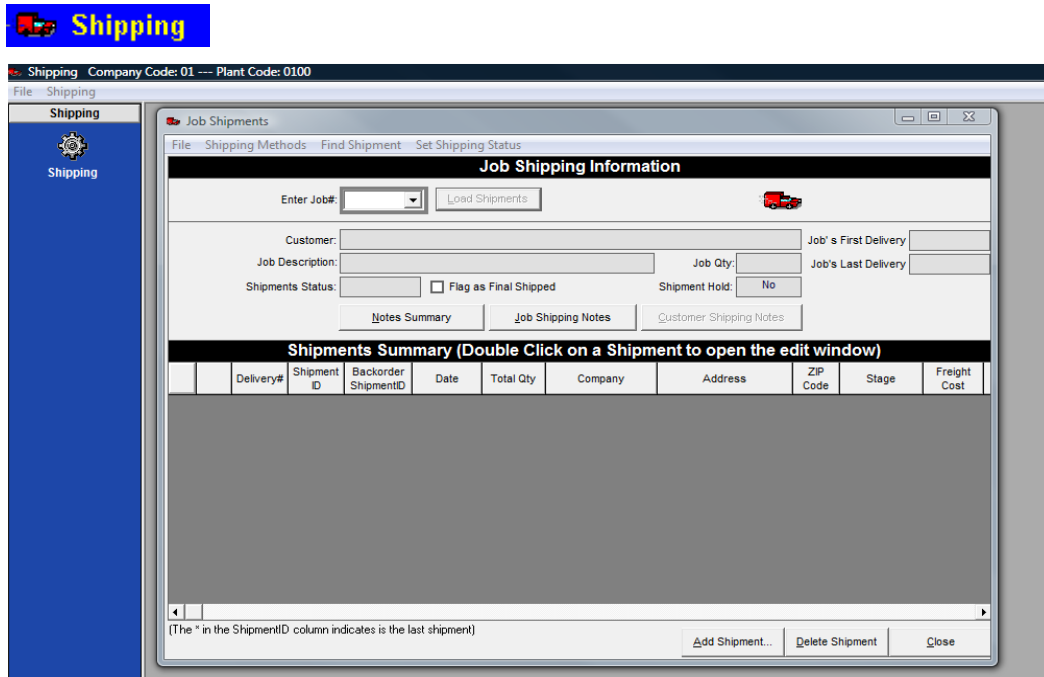


2. Open the job in Order Entry mode. Click the red truck **Deliv** icon to open the Shipping module.



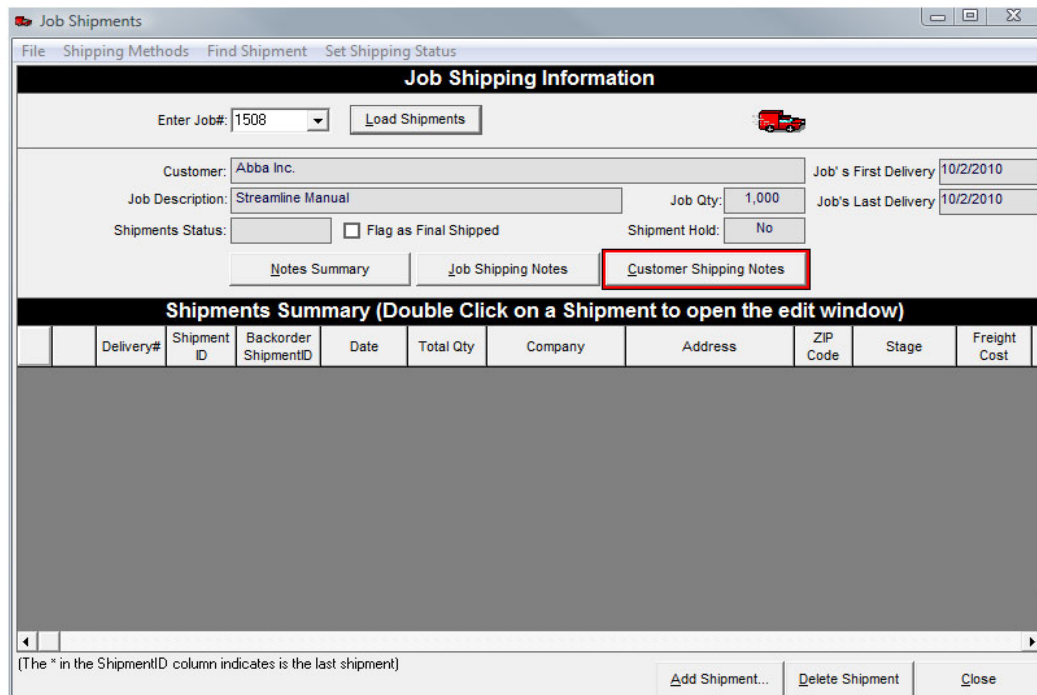
## Job Shipments

1. To open, edit, or add shipments on a job, click the shipping icon.



The screenshot shows the 'Shipping' icon in the top left corner, which is a red truck icon next to the word 'Shipping' in a blue box. Below it is the 'Job Shipments' window. The window has a title bar 'Job Shipments' and a menu bar 'File Shipping Methods Find Shipment Set Shipping Status'. The main area is titled 'Job Shipping Information' and contains fields for 'Enter Job#', 'Customer', 'Job Description', 'Shipments Status', 'Job Qty', 'Job's First Delivery', 'Job's Last Delivery', 'Flag as Final Shipped', and 'Shipment Hold'. There are buttons for 'Load Shipments', 'Notes Summary', 'Job Shipping Notes', and 'Customer Shipping Notes'. Below this is a 'Shipments Summary' table with columns: Delivery#, Shipment ID, Backorder ShipmentID, Date, Total Qty, Company, Address, ZIP Code, Stage, and Freight Cost. The table is currently empty. At the bottom, there are buttons for 'Add Shipment...', 'Delete Shipment', and 'Close'. A note at the bottom left says '(The \* in the ShipmentID column indicates is the last shipment)'.

2. The Job Shipments screen will open. Enter the job number and press the Enter key.



The screenshot shows the 'Job Shipments' window with data entered. The 'Enter Job#' field contains '1508'. The 'Customer' field contains 'Abba Inc.'. The 'Job Description' field contains 'Streamline Manual'. The 'Job Qty' field contains '1,000'. The 'Job's First Delivery' field contains '10/2/2010'. The 'Job's Last Delivery' field contains '10/2/2010'. The 'Shipment Hold' field contains 'No'. The 'Customer Shipping Notes' button is highlighted with a red box. The 'Shipments Summary' table is still empty. The 'Add Shipment...' button is highlighted with a red box. The note at the bottom left is the same as in the previous screenshot.

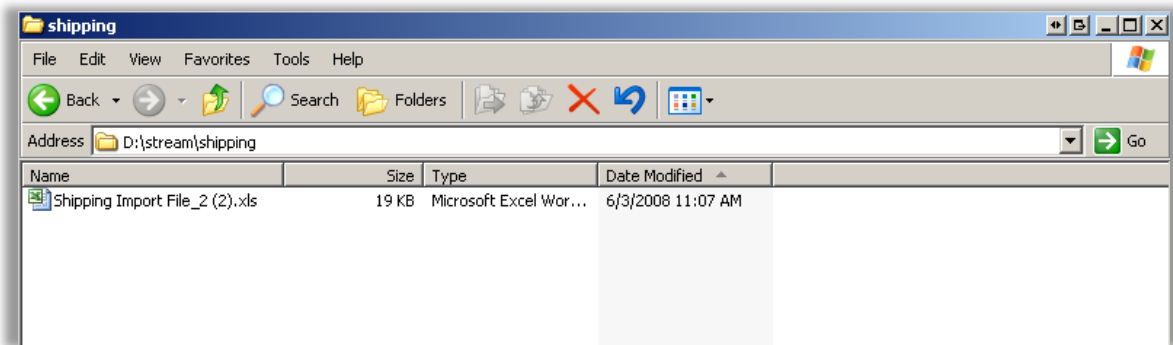
## Import Shipments

To import shipments from a spreadsheet, click File > Import Shipments (from MS Excel).



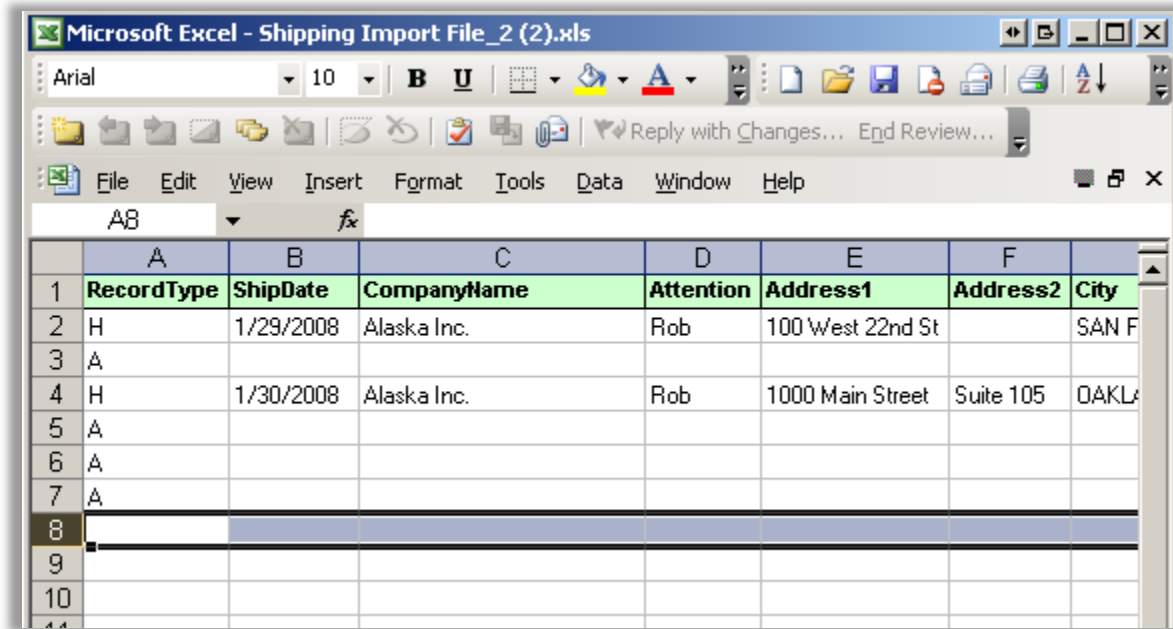
## Select MS Excel File

Select the Excel file and click Open to begin the shipping import.



## Shipping Import

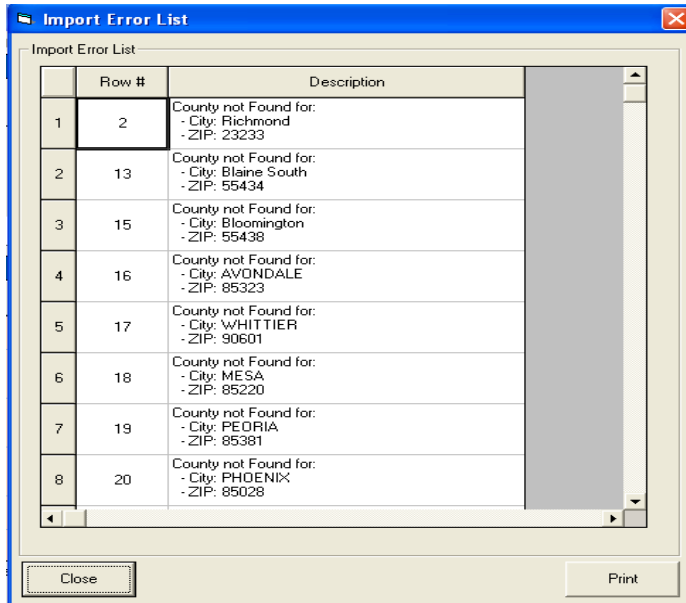
The MS Excel shipping import file will open and scroll through the import spreadsheet. Do not close out until it has scrolled all the way to the bottom of the spreadsheet.





## Zip Code Verification

As shipments are imported, an error list may open. A County Not Found" error indicates that the zip code is in a non-nexus state, so it cannot be verified in the system. Click **Close** to view the shipments.



## Load Shipments

Select **Load Shipments** in the Job Shipments screen to import shipments for the job.

- A green checkmark indicates that the shipment has been created but has not yet shipped.
- A red truck indicates that a line has shipped.
- The Shipment Status field will be blank for orders that have not shipped, Partial for orders partially shipped, and Final if all shipments on the job have been shipped.

**Job Shipments**

File Shipping Methods Find Shipment Set Shipping Status

Enter Job#: 817 **Load Shipments**

Customer: Pollard Consulting

Job Description: graph 6 Job Qty: 26,000

Shipments Status: FINAL ☒ Flag as Final Shipped Shipment Hold: No

Notes Summary Job Shipping Notes Customer Shipping Notes

**Shipments Summary**

	Delivery#	Shipment ID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost
1	0	38	1/29/2008	50100	Alaska Inc.	100 West 22nd St SAN FRANCISCO, CA	94115-11	Non Defined	0.00
2	35	39	6/3/2008	100000	Alaska Inc.	1000 Main Street Suite 105 OAKLAND, CA	94502	Non Defined	0.00
3	0	40	1/29/2008	50100	Alaska Inc.	100 West 22nd St SAN FRANCISCO, CA	94115-11	Non Defined	0.00
4	0	41	1/30/2008	100000	Alaska Inc.	1000 Main Street Suite 105 OAKLAND, CA	94502	Non Defined	0.00

(Double Click on a Shipment to open the edit window)

Add Shipment... Delete Shipment Close

### View/Edit Shipment

Double-click a shipment line in Job Shipments to view or edit the shipment details.

**Editing Shipment**

Packing Slip#:   
Cust. Acc#:   
Job#:

Shipment ID:   
Customer:   
Job Desc.:

Date:  Time:   
☐ Not Ready to Ship  
☐ Last Shipment

Contact:   
Phone:   
Company:   
Address:   
City:  State:   
County:  Zip:   
Country:

Select Address

☐ Hold Contact when selecting a new address

Responsible:   
Email:

Ship Method:   
Ship Type:   
Stage:   
Billing Type:   
Cost Code:   
Ship Cost:   
Tracking#:

Acct#:   
☒ Hold Acct# when selecting a new address  
Weight:   
Packages:   
No. of Skids:   
Cust. PO:

### Shipment Items

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Insurance Guidelines \		Notch Case/Perfe	ISBN-001	4489	4489	0				

(Double click on a shipment item# to edit the packages)

## Shipping Import File Sections

Shipping Import File 2 has the following 61 columns – broken into 3 different sections.

## Shipment Header Information

1<sup>st</sup> Section (Green) = Shipment Header Information

[illegible][illegible]

	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ
1	ShipConfirmMethod	ShipConfirmAddress	3PCompan	3PATtention	3PAddress	3PAddress2	3PCity	3PState	3PZip	3PAccountNo	3PTaxCounty	3PCountry	PaymentMethod	Email
2														Rob@printstream.com.n
3														Rob@printstream.com.n
4														
5														
6														
7														

## Shipment Item Information

2<sup>nd</sup> Section (Yellow) = Shipment Item Information

	AR	AS	AT	AU	AV	AW	AX	AY	AZ	BA	BB
1	LineItemDescription	InventoryCode	PackageCode	Ref1ISBN	Ref2Label	Ref3BindStyle	Ref4Version	Ref5ShipStatus	LineItemQty	Item Type	PackageDescr
2	Insurance Guidelines Worldwide			ISBN-001	These notes should print on the shipping labels	Notch Case/Perfect	Notch Case/Perfect Bind		4489	Printed Matter	#'s 1000 - 1067
3	Insurance Guidelines Worldwide			ISBN-001		Notch Case/Perfect	Notch Case/Perfect Bind		11	Printed Matter	#'s 1068
4	Insurance Guidelines Worldwide			ISBN-001	Different Notes for Shipping Label	Notch Case/Perfect	Notch Case/Perfect Bind		4958	Printed Matter	#'s 2000- 2074
5	Insurance Guidelines Worldwide			ISBN-001		Notch Case/Perfect	Notch Case/Perfect Bind		42	Printed Matter	#'s 2075
6	Insurance Guidelines Worldwide			ISBN-001		Notch Case/Perfect	Notch Case/Perfect Bind		9983	Printed Matter	#'s 3000- 3149
7				ISBN-001					17	Printed Matter	# 3150

## Package Details

3<sup>rd</sup> Section (Purple) = Package Details

	BB	BC	BD	BE	BF	BG	BH	BI	BJ
1	PackageDescr	ItemsPerPackage	Packages	TotalQty	PackageHeight	PackageWid	PackageLength	PackageWe	PackageType
2	#'s 1000 - 1067	67	67	4489	15	9 1/4	12 1/4	130	Carton
3	#'s 1068	11	1	11	10	9 1/4	12 1/4	22	Carton
4	#'s 2000- 2074	67	74	4958	13	9 1/4	12 1/4	130	Carton
5	#'s 2075	42	1	42	12	9 1/4	12 1/4	82	Carton
6	#'s 3000- 3149	67	149	9983	8	9 1/4	12 1/4	130	Carton
7	# 3150	17	1	17	9	9 1/4	12 1/4	33	Carton

## Shipping Import File Information

### 1<sup>st</sup> Section (Green) Shipment Header Information

#### Column A - Record Type

The first column indicates if the record is a Header Row or Additional Item or Package Details. Column A is the ONLY required field in the file, this column will create a shipping record (but with no data unless other fields are populated). The remainder of the fields are optional and will populate the corresponding data.

1	RecordType	SH	MCunningham:
2	H	1/	H or A Required
3	A		H = Header Record
4	H	1/	A = Additional Information
5	A		
6	A		
7	A		
8	H	Column B	Column C 0123
9	A	Column B	Column C 0123
10		1	2

## Columns B – I


- B: ShipDate = Date
- C: CompanyName = company
- D: Attention = Contact (click shipping line)
- E: Adress1 = Address
- F Adress2 = Address
- G: City = Address
- H: State = Address
- I: Zip = Zip Code

B	C	D	E	F	G	H	I
ShipDate	CompanyName	Attention	Address1	Address2	City	State	Zip
1/29/2008	Alaska Inc.	Rob	100 West 22nd St		SAN FRANCISCO	CA	94115-123
1/30/2008	Alaska Inc.	Rob	1000 Main Street	Suite 105	OAKLAND	CA	94502

**Job Shipments**

File Shipping Methods Find Shipment Set Shipping Status

### Job Shipping Information





Enter Job#:   

Customer:

Job Description:  Job Qty:

Shipments Status:  ☒ Flag as Final Shipped Shipment Hold:

### Shipments Summary

	Delivery#	Shipment ID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost
1		0	38	1/29/2008	50100 Alaska Inc.	100 West 22nd St SAN FRANCISCO, CA	94115-12	Non Defined	0.00
2		35	39	6/3/2008	100000 Alaska Inc.	1000 Main Street Suite 105 OAKLAND, CA	94502	Non Defined	0.00
3		0	40	1/29/2008	50100 Alaska Inc.	100 West 22nd St SAN FRANCISCO, CA	94115-12	Non Defined	0.00
4		0	41	1/30/2008	100000 Alaska Inc.	1000 Main Street Suite 105 OAKLAND, CA	94502	Non Defined	0.00

(Double Click on a Shipment to open the edit window)

## Columns B – L

- B. Ship date = Date
- C. CompanyName = Company
- D. Attention = Contact
- E. Address1 = Address
- F. Address2 = Address
- G. City = City
- H. State = State
- I. Zip = Zip
- J. Tax County = County
- K. Country = Country
- L. Phone = phone

Double-click the Shipment Line to Open Editing Shipments.

B	C	D	E	F	G	H	I	J	K	L
ShipDate	CompanyName	Attention	Address1	Address2	City	State	Zip	TaxCounty	Country	Phone
1/29/2008	Alaska Inc.	Rob	100 West 22nd St		SAN FRANCISCO	CA	94115-123	San Francisco	USA	123.456.7890
1/30/2008	Alaska Inc.	Rob	1000 Main Street	Suite 105	OAKLAND	CA	94502	Alameda	USA	987.654.3210

**Editing Shipment**

Packing Slip#:  Shipment ID:  Date:  Time:  ☐ Not Ready to Ship

Cust. Acct#:  Customer:

Job#:  Job Desc.:

Contact:   Responsible:  Acct#:

Phone:   Ship Method:  ☒ Hold Acct# when selecting a new address

☐ Hold Contact when selecting a new address

Contact:  Tracking#:

Phone:  Ship Cost:  Weight:

Company:  Ship Type:  No. of Packages:

Address:  Stage:  No. of Skids:

City:  State:  Customer PO:

County:  Zip:

Country:  Billing Type:

**Shipment Items**

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Specialty Manual			ISBN-001	50100	50100	0				...

(Double click on a shipment item# to edit the packages)

## Columns M-R

- Fax = not displayed
- Responsible = Responsible
- Billing Type = Billing Type > drop down field
- CustomerPO = Customer PO
- ShipMethod = Ship Method > drop down field
- TotalWeight = weight

M	N	O	P	Q	R
<b>Fax</b>	<b>Responsible</b>	<b>BillingType</b>	<b>CustomerPO</b>	<b>ShipMethod</b>	<b>TotalWeight</b>
	John Brown	Prepaid	PO-001	UPS Ground	17040
	Jill Brown	Collect	PO-2007-001	Fedex Next Day Air	9550

**Note** Red headings indicate predefined fields. You must use one of the items already defined in the system.

**Editing Shipment**

Packing Slip#:  Shipment ID:  Date:  Time:  ☐ Not Ready to Ship

Cust. Acc#:  Customer:

Job#:  Job Desc.:

Contact:   Responsible:  Acct#:  ...

Phone:   Ship Method:  ☒ Hold Acct# when selecting a new address

☐ Hold Contact when selecting a new address

Tracking#:  Weight:

Ship Cost:  No. of Packages:

Ship Type:  No. of Skids:

Stage:  Customer PO:

Billing Type:

Company:

Address:

City:  State:

County:  Zip:

Country:

**Shipment Items**

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Specialty Manual			ISBN-001	50100	50100	0				

(Double click on a shipment item# to edit the packages)

### Column S

- Shipping Notes = packing slip notes (printer icon>edit notes)

[illegible]



## Columns T – X

- Reference 1 = Reference 1
- Reference 2 = Reference 2
- Reference 3 = Reference 3
- Reference 4 = Reference 4
- Reference 5 = Reference 5

These fields are found by clicking on reference fields.

S	T	U	V	W	X
Shipment Notes	Reference1	Reference2	Reference3	Reference4	Reference5

The screenshot shows the 'Editing Shipment' window with various fields for shipment details. A 'Reference Fields' dialog box is open in the foreground, allowing the user to enter or edit five reference fields. The dialog box has a title bar 'Reference Fields' and buttons for 'Cancel', 'Clear', and 'OK'.

**Editing Shipment Fields:**

- Packing Slip#: [ ] Shipment ID: 38 Date: 1/29/2008 Time: 12:00:00 PM ☐ Not Ready to Ship
- Cust. Acc#: 12345678 Customer: Pollard Consulting
- Job#: 817 Job Desc.: Graph 6
- Contact: Rob Select Address Responsible: John Brown Acct#: [ ]
- Phone: 123.456.7890 House Address Ship Method: UPS Ground ☒ Hold Acct# when selecting a new address
- ☐ Hold Contact when selecting a new address Tracking#: [ ] Weight: 17040
- Contact: Rob Ship Cost: 0.00 No. of Packages: 201
- Phone: 123.456.7890 Ship Type: Ship To No. of Skids: 0
- Company: Alaska Inc. Stage: Non Defined Customer PO: PO-001
- Address: 100 West 22nd St
- City: [ ] Customer's Time Stamped Notes
- County: [ ] Reference Fields
- Country: [ ] Packages Detail
- Descr: [ ]
- 1 Specialty M

**Reference Fields Dialog:**

- Reference 1: [ ]
- Reference 2: [ ]
- Reference 3: [ ]
- Reference 4: [ ]
- Reference 5: [ ]
- Buttons: Cancel, Clear, OK

**Bottom Bar:**

- Back Order: 0
- Item Type: [ ]
- Tax: [ ]
- Job Qty: [ ]
- Print Labels: [ ]


## Shipping Notes

Entered information in Column S- Shipment Notes to appear on the work order. Shows on the Print work order or the Combined print and mail work order

S
Shipment Notes
1
2
3
4
5
6

Shipping			
Ship To	Quantity	Date	Notes
Alaska Inc. Attn: Rob 1000 Main Street Suite 105 OAKLAND CA, 94602 Phone: 987.654.3210	100,000	1/30/2008	Unders 0% ; Overs 0%  3
Alaska Inc. Attn: Rob 100 West 22nd St SAN FRANCISCO CA, 94115-1234 Phone: 123.456.7890	50,100	6/5/2008	Unders 0% ; Overs 0% Pack Slip # 141 Est Qty = 50100 Back Order Qty = 0 1

## Columns AF – AP

These columns all pertain to 3<sup>rd</sup> party information. This information is found by selecting the ellipses icon () next to the ACCT#.

- AF. 3PCompany = Company
- AG. 3PAttention = Name
- AH. 3PAddress = Address
- AI. 3PAddress2 = Address
- AJ. 3PCity = City
- AK. 3PState = State
- AL. 3PZip = Zip
- AM. 3PAccountNo = Acct#
- AN. 3PTaxCounty = County
- AO. 3PCountry = Country
- AP. PaymentMethod = To be programmed

AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP
3PCompany	3PAttention	3PAddress	3PAddress2	3PCity	3PState	3PZip	3PAccountNo	3PTaxCounty	3PCountry	PaymentMethod
										VISA

**Editing Shipment**

Packing Slip#: 141 Shipment ID: 153 Date: 6/5/2008 Time: 11:08:00 AM ☐ Not Ready to Ship

Cust. Acc#: 12345678 Customer: Pollard Consulting

Job#: 1528 Job Desc.: Shipping import

Contact: Rob Select Address Responsible: John Brown Acct#: ...

Phone: 123.456.7890 House Address Ship Method: UPS Gr

☐ Hold Contact when selecting a new address Tracking#:

Contact: Rob Ship Cost:

Phone: 123.456.7890 Ship Type: Ship To

Company: Alaska Inc. Stage: Non Def

Address: 100 West 22nd St Billing Type: Prepaid

City: SAN FRANCISCO State: CA

County: San Francisco Zip: 94115-1234

Country: USA

**Third Party Information**

Acct#:

Company:

Name:

Address:

City:

State: Zip:

County:

Country:

Close Clear Save

**Shipment Item**

	Description	Version	Bind Style	ISBN
1	Specialty Manual			ISBN-001

### Column AQ – Email

This column works with the Shipping Email service. If you have the Email Service configured on PrintStream, you can enter the email addresses here to receive shipping email notices when the shipment is shipped. Multiple addresses can be added each address needs to be separated by a “;”.

AQ

Email

Rob@printstream.com; norma@printstream.com; chuck@printstream.com

Editing Shipment

Packing Slip#:

Cust. Acc#:

Job#:

Shipment ID:

Customer:

Job Desc.:

Date:

Time:

☐ Not Ready to Ship

☐ Last Shipment

Contact:

Phone:

Select Address

House Address

Responsible:

Email:

Acct#:

☒ Hold Acct# when selecting a new address

Contact:

Phone:

☐ Hold Contact when selecting a new address

Ship Method:

Ship Type:

Weight:

Packages:

John Rodgers

907.423.1840

149

Abba Inc.

Streamline Manual

12/12/2011

12:00:00 PM

Jack R

Rob@printstream.com; norma@printstream.com

UPS Ground

Ship To

8732

68

## Columns Y – AE

- Y Residential Y/N
- Z Saturday Delivery Y/N
- AA Signature Required Y/N
- AB Declared Value
- AC Ship Confirm Y/N
- AD Ship Confirm Method
- AE Ship Confirm Address

Y	Z	AA	AB	AC	AD	AE
Residential	Saturday Delivery Y/N	Signature Rqd Y/N	Declared Value	Ship Confirm Y/N	Ship Confirm Method	Ship Confirm Address

**Editing Shipment**

Packing Slip#:  Shipment ID: 152 Date: 12/12/2011 Time: 12:00:00 PM ☐ Not Ready to Ship ☐ Last Shipment

Cust. Acc#: ABBA1 Customer: Abba Inc. Job#: 1508 Job Desc.: Streamline Manual

Contact: John Rodgers Select Address House Address Responsible: Jack R

Phone: 907.423.1840 Email: Rob@printstream.com; norma

☐ Hold Contact when selecting a new address

Contact: John Rodgers Ship Method: UPS Ground

Phone: 907.423.1840 Ship Type: Ship To

Company: Alaska Inc. Stage: Non Defined

Address: 123456 Alaskan Highway Billing Type: Prepaid

City: Anchorage State: AK Cost Code:

County: Anchorage Zip: 99501 Ship Cost: 0.00

Country: USA Tracking#:

Account:  ☒ Hold Acct# when selecting a new address

Weight: 8732

Packages: 68

No. of Skids: 0

Cust. PO: PO-001

Customer's Time Stamped Notes

Reference/Options

Web Service Package Information

**Shipment Options And Reference Fields**

Shipment Options:

☒ Residential ☒ Signature Required

☒ Saturday Delivery ☒ Shipment Confirmation

Declared Value: 1,000.00

## 2<sup>nd</sup> Section (Yellow) – Shipment Items Detail

### Columns AR – BA

These fields all pertain to the item details.



### 3<sup>rd</sup> Section (Purple) = Package Details

#### Columns BB – BJ

These columns pertain to the package items. This screen is found in the Shipping > Editing Shipments > Edit Packages screen:

- BB. PackageDescr = Description
- BC. ItemsPerPackage = Per Pack
- BD. Packages = Packages
- BE. TotalQTY = Total
- BF. PackageHeight = To be added with future programming
- BG. PackageWidth = To be added with future programming
- BH. PackageLength = To be added with future programming
- BI. PackageWeight = weight
- BJ. PackageType = To be added with future programming

BB	BC	BD	BE	BF	BG	BH	BI	BJ
PackageDescr	ItemsPerPackage	Packages	TotalQty	PackageHeight	PackageWidth	PackageLength	PackageWeight	PackageType
#s 1000 - 1067	67	67	4489	15	9 1/4	12 1/4	130	Carton
#s 1068	11	1	11	10	9 1/4	12 1/4	22	Carton
#s 2000- 2074	67	74	4958	13	9 1/4	12 1/4	130	Carton
#s 2075	42	1	42	12	9 1/4	12 1/4	82	Carton
#s 3000- 3149	67	149	9983	8	9 1/4	12 1/4	130	Carton
# 3150	17	1	17	9	9 1/4	12 1/4	33	Carton

Edit Packages

Dimensions

Max SizeX: 0.00  
Max SizeY: 0.00  
Max SizeZ: 0.00

Totals

Max Weight: 0.00  
Total Weight: 8,732.00

Actual Quantity: 4500  
Total Quantity: 4,500

Item: Insurance Guidelines Worldwide

	Description	Per Pack	Packages	Total	Package Weight	Qc. Ref
1	#s 1000 - 1067	67	67	4,489	130.00	
2	#s 1068	11	1	11	22.00	
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						

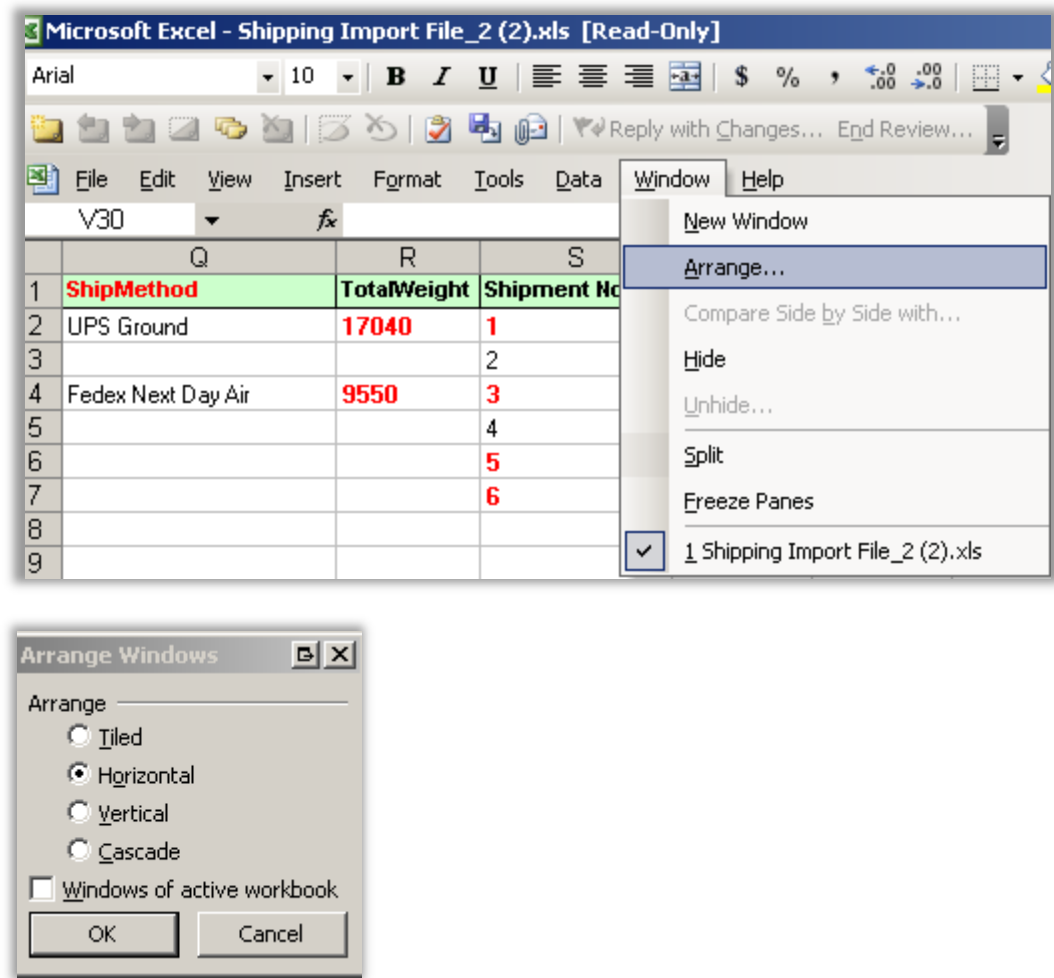
Save
Delete
Close

## Excel Formatting Information

The information in the following section includes helpful Excel information for use in formatting the import spreadsheet.

### Arrange Horizontal

To display multiple screens (i.e., Data File and Shipping Import Template) simultaneously, click Window > Arrange. Select **Horizontal** and click **OK**.



Any files that open in Excel will display on the screen.



## Move to First Cell

To move to the uppermost cell of your spreadsheet at any time without scrolling to the top, select **Ctrl + Home**. This will redirect you to cell A1.

	A	B	C
1	RecordType	ShipDate	CompanyName
2	H	1/29/2008	Alaska Inc.
3	A		
4	H	1/30/2008	Alaska Inc.
5	A		
6	A		
7	A		

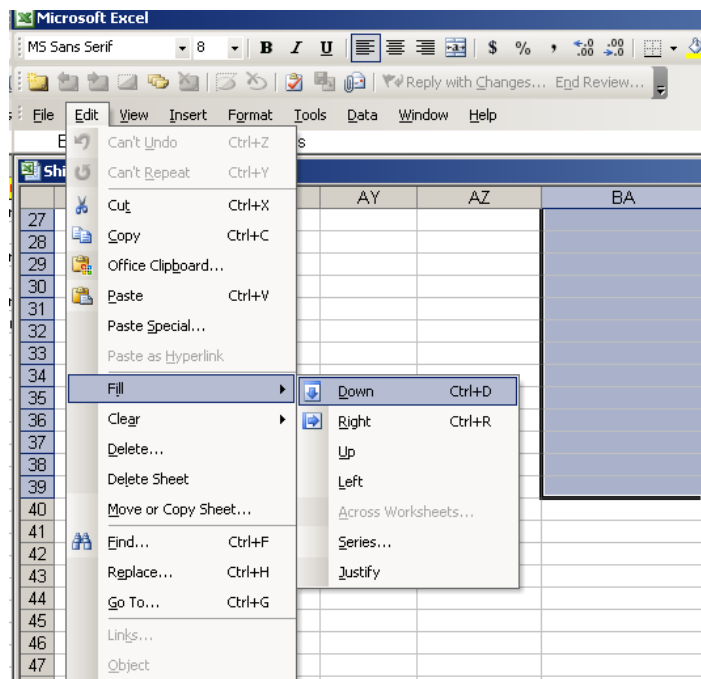
## Move to Last Cell

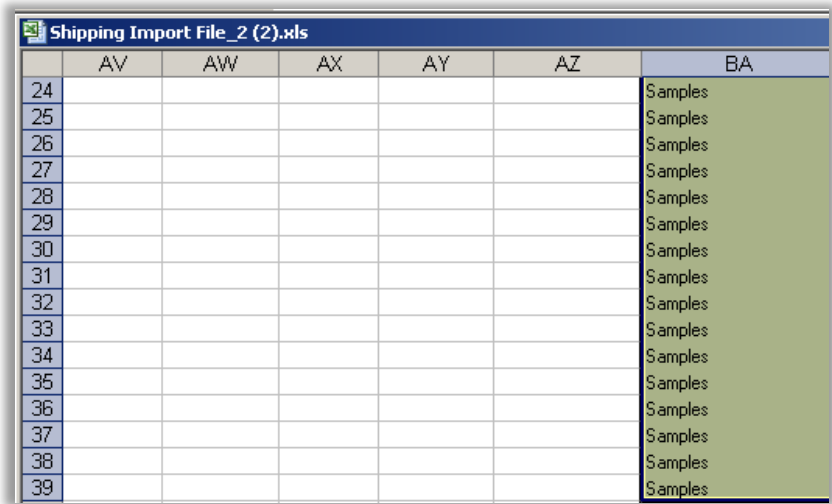
To move to the last cell of your spreadsheet at any time without scrolling to the bottom, select **Ctrl + End**. This will redirect you to the lowest right cell of the spreadsheet.

AY	AZ	BA	BB	BC	BD	BE	BF	BG	BH	BI
LineItemQty	ItemType	PackageDescr	ItemsPerP	Packages	TotalQty	PackageHeight	PackageWid	PackageLength	PackageWe	PackageType
50100	Printed Material	#s 1000 - 1999	250	200	50000			17	85	Carton
		#s 2000 - 2049	100	1	100				40	Carton
25000	Printed Material	#s 2050 - 3149	250	100	25000				85	Carton
		#s 3150 - 3224	75	1	75				1.3	Carton
72500	Printed Material		2500	29	72500				35	Carton
2500	Samples	Samples	2500	1	2500				35	Carton

## Fill Down

To duplicate information from one cell to cells below it, select the first cell, select **Shift + down arrow** to select the cells to fill. Select on **Edit > Fill > Down**.

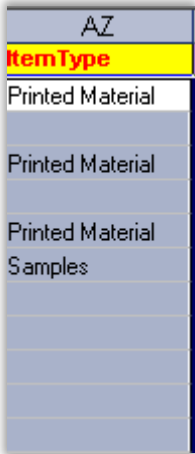




	AV	AW	AX	AY	AZ	BA
24						Samples
25						Samples
26						Samples
27						Samples
28						Samples
29						Samples
30						Samples
31						Samples
32						Samples
33						Samples
34						Samples
35						Samples
36						Samples
37						Samples
38						Samples
39						Samples

Select Cells in Column

To select the cells in a column, click the first cell to select. Select Shift + End + down arrow. This will select all cells below the first.



AZ
ItemType
Printed Material
Printed Material
Printed Material
Samples

Copy & Paste

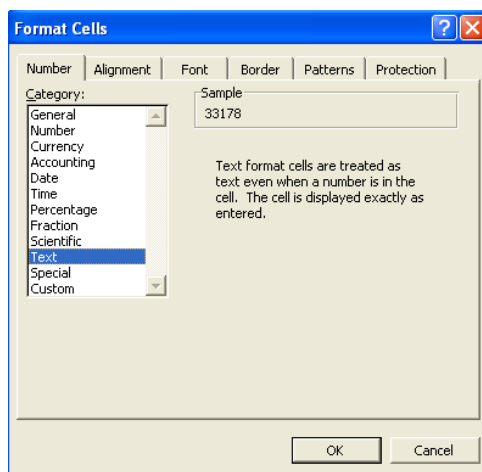
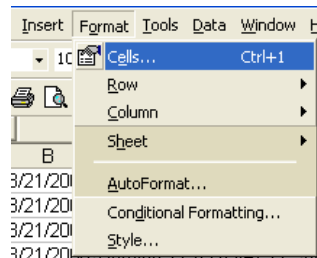
To copy a cell, select Ctrl + C. The cell will indicate that it is active with dotted lines. Click the cell you wish to paste into, and press Enter. (You can also press Ctrl + V to paste.)



## Zip with Leading Zero

If there are zip codes with a leading zero, the zero may drop off and leave a 4-digit number. To fix this, click **Format > Cells**. In the **Number** tab of the **Format Cells** box, click **Text** and click **OK**. The format will change the cells from a number format to text. The zero can then be typed at the beginning of the zip code and will remain for the import.

33178
7201
90650
11424
1403
77573
3125
55105



33178
07201
90650
11424
01403
77573
03125

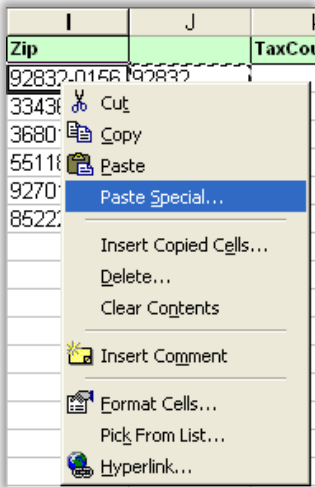
## Formatting Zip Codes

If a zip code is in a zip + 4 format, it will not import correctly into PrintStream. The zip code must be reformatted to import properly.

### Zip + 4 Format

Zip
92832-0156
33436-1324
36801-4832
55118-1234
92701-7894
85222-1879

Select the cells with the zip code formula (now showing as the 5-digit zip code). Press Ctrl + C to copy the cells. Click the first cell from the original zip code column with the zip + 4 format. Right-click the cell and select Paste Special.



The Paste Special box will display. Select **Paste as Values** and click **OK**.

### Formatting Cells as a 5-digit Zip Code

To format the cell as a 5-digit zip code, insert a column to the right of the zip code column. Type “=LEFT(cell #,5)” and press Enter. The cell reference in the formula can be obtained by clicking on the cell with the zip code in it.

I	J
Zip	
92832-0156	=LEFT(I2,5)
33436-1324	
36801-4832	
55118-1234	
92701-7894	
85222-1879	

The zip code will appear in the cell as 5 digits. To duplicate this formula, click the lower right corner of the cell. Hold down the mouse click and drag the formula down to duplicate it as needed.

I	J
<b>Zip</b>	
92832-0156	92832
33436-1324	
36801-4832	
55118-1234	
92701-7894	
85222-1879	

This will remove the formula and paste the correct zip code in the original column. Make sure to select the entire formula column, right-click, and delete so the import files will align properly.

I	J
<b>Zip</b>	
92832	92832
33436	33436
36801	36801
55118	55118
92701	92701
85222	85222