

## New Delivery Job Import (Existing Customers)

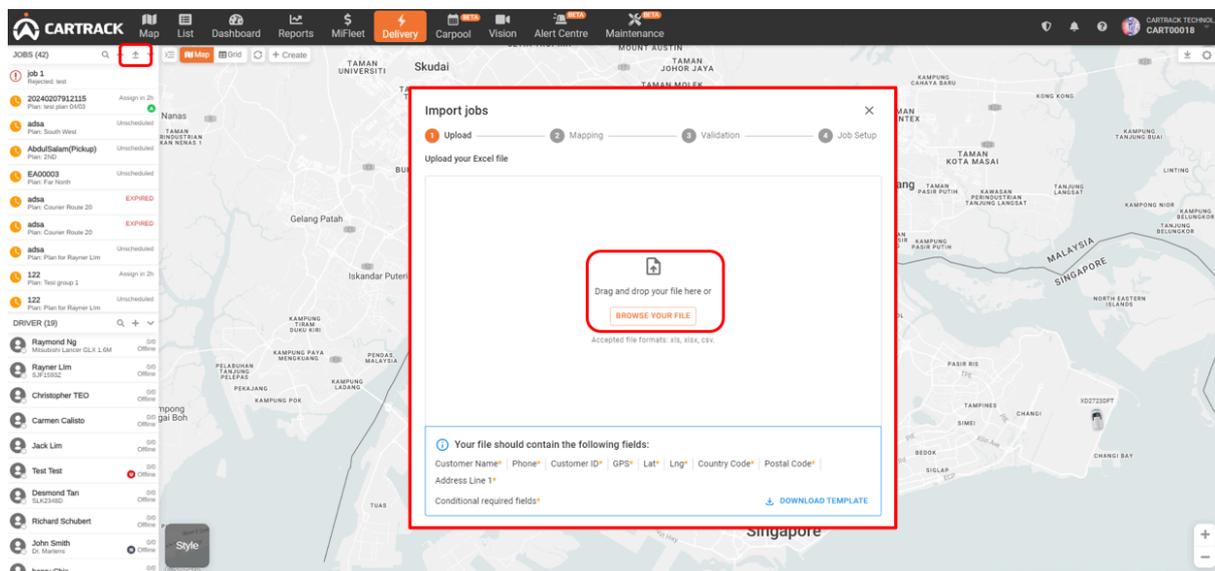
The imports section in Delivery allows users to bulk upload jobs into Delivery through an excel file. This enables ease of job creation without manual creation.

This new Delivery Job import will enable users to:

- 1) Create Multiple Templates
- 2) Import an excel without removing unnecessary columns
- 3) Create To Dos

**The new Delivery Job Import feature will transfer over your existing templates without you creating a new one.**

Importing your existing Template



1. Select the import button on the Jobs panel
2. An Import Jobs window will appear.
3. Drag and drop your file to the window or browse for your existing file template

**Import jobs** ×

✔ Upload — 2 Mapping — 3 Validation — 4 Job Setup

Map delivery fields to the columns in your file for data import

✔

Uploaded file matched 'Template 1'. 12 columns mapped automatically.  
Any changes made can be updated to 'Template 1' at the end of the import process.

DELIVERY FIELDS	YOUR EXCEL FILE COLUMNS	EXCEL DATA PREVIEW
Order/Reference Number	Select column No. <span style="float: right;">✔</span>	No data found
Customer Name <span style="color: orange;">ⓘ</span>	Select column Customer <span style="float: right;">✔</span>	AH ZUI - HOUGANG (8A030)
Phone <span style="color: orange;">ⓘ</span>	Select column Contact Num... <span style="float: right;">✔</span>	No data found
Customer ID <span style="color: orange;">ⓘ</span>	Select column <span style="float: right;">✔</span>	Select column to preview
GPS <span style="color: orange;">ⓘ</span>	Select column <span style="float: right;">✔</span>	Select column to preview
Lat <span style="color: orange;">ⓘ</span>	Select column <span style="float: right;">✔</span>	Select column to preview
Lng <span style="color: orange;">ⓘ</span>	Select column <span style="float: right;">✔</span>	Select column to preview

IMPORT 12 COLUMNS

- Your existing excel template should be mapped
- Click on Import for system to validate the information.

**Import jobs** ×

✔ Upload — ✔ Mapping — 3 Validation — 4 Job Setup

Check for errors in the uploaded Excel file

✔

Data is validated! Please proceed to next step  
No errors detected

PREVIOUS
NEXT

- Once validated\*, you can proceed to click on Next.

\*It will prompt the issues if validation is not successful.

## Import jobs

Upload Mapping Validation **4 Job Setup**

Specify required to-dos and item deliveries at each job stop for drivers to complete  
This setup will serve as a default, but any specifics included in the uploaded Excel sheet will always take precedence

**At go-to job, the driver must complete**

**To-dos** (Take photo, get signature or note)  
No to-dos added

+ ADD TO-DO

**Items** (Package, service or a person)  
No items added

+ ADD ITEM

**At pick-up & drop-off job, the driver must complete**

**To-dos** (Take photo, get signature or note)  
No to-dos added

+ ADD TO-DO

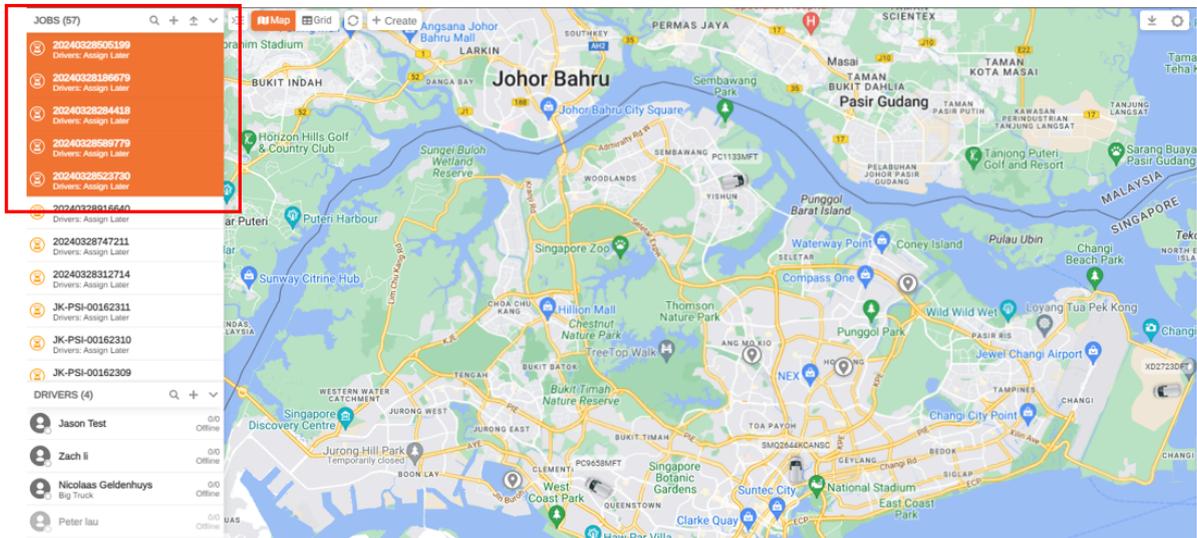
**Items** (Package, service or a person)  
No items added

+ ADD ITEM

PREVIOUS

COMPLETE IMPORT

- On the final Job Setup, select Complete Import.



Once done, Jobs have been successfully imported and will reflect in the Jobs List.