USTruckManager.py

V1.0 User Guide – Alex Dowling-Deslauriers – 2021-01-12

|  |  |  |
| --- | --- | --- |
| **Paperwork/File** | **Purpose** | **Requires** |
| Bill of Lading (BoL) | Required for any commercial load. | Package Count, Weight, Gaylord count (occasionally PAPS# from Tri-Ad). Also print off “Stalco\_BoL\_Labels.pdf” located in USTM folder |
| Tri-Ad BoL | Requested by Tri-Ad for time-keeping purposes | Sent by Tri-Ad |
| ACE Manifest (JSON) | Sent to Tri-Ad, who uploads to BorderConnect. Lists every package crossing the border for US Customs | Produced by USTM. Requires Batches Scans, ACE and CSV Report |
| ACE Manifest (PDF) | Print the first page off and delivery to driver. Used by customs to match trucks to ACE shipments | Sent by Tri-Ad after we send them the ACE |
| ProForma | Required if FDA-regulated goods are being shipped. Details the FDA-regulated good contained | ProForma Template produced by USTM (requires Batches Scans, ACE and CSV Report). Template uploaded to SmartBorder, where ProForma can be downloaded |
| USPS Manifest Sheets | Given to USPS to process packages | Downloaded from Techship. Attach BoL 1st page to this package |
| IMS BoL | Used by IMS to keep track of gaylords. Also functions as a BoL for IMS | All envelopes to be received. Produced automatically by USTM or done manually |
| DHL Manifest Sheets | Given to DHL to process packages. Include one copy with IMS BoL and staple a second copy to a DHL gaylord | Downloaded from Techship |
| Detailed Report | Copies kept on hand and provided to Tri-Ad to facilitate finding packages when truck is searched | Produced by USTM. Requires Batches Scans, ACE and CSV Report |

# How to Use USTruckManager.py

## Step 1. Closing Manifests

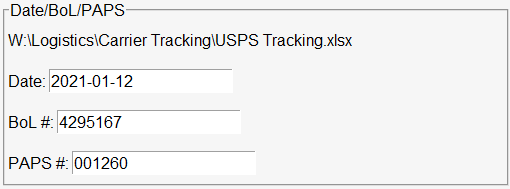
<http://stalco.techship.ca/Orders/Manifests/Open>  
On Techship, close the manifests for today (List as of 2021-01-12):  
 USPS – EHub *(ZS-manifest)*  
 USPS – EHub *(EH-manifest)*  
 USPS – EHub (DCMT)  
 DHL from USA (5121162)  
 FedEx – 673759831  
The manifest for Cuddle & Kind (USPS – EHub (Cuddle & Kind)) should have been closed the day previously.

Once all manifests have been closed, go to the *Manifest History* page  
<http://stalco.techship.ca/Orders/Manifests>  
Select every manifest for the day, including the CK manifest. Download the ACE Manifest and CSV Report (both under the Download dropdown menu)

## Step 2. USTM Setup

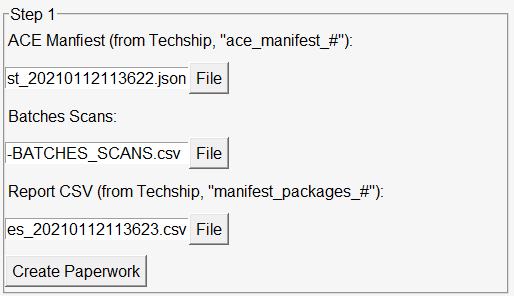
W:\Logistics\Tools\USTruckManager

Run USTruckManager.exe



Update the Date/BoL #/PAPS #. See:  
W:\Logistics\Carrier Tracking\USPS Tracking.xlsx

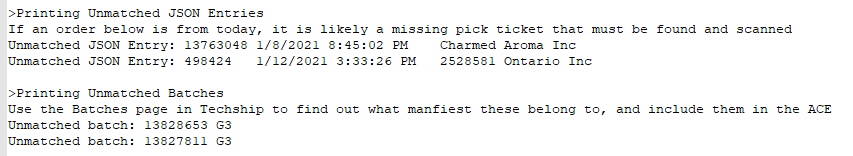
## Step 3. Creating Paperwork



Upload the ACE Manifest, Batches Scans, and Report CSV in the labelled boxes.

Then hit *Create Paperwork*. All the paperwork (except the ProForma) should be generated

### Manifest Hunting

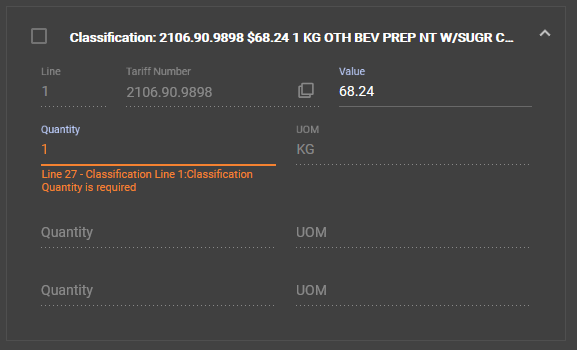
Open the Error\_Log.txt file in the folder for today (eg. “\2021-01-31\”)  
  
There are two types of warnings: Unmatched JSON Entry and Unmatched Batch

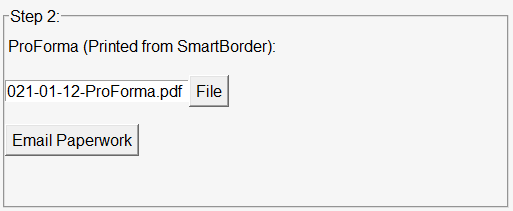
**Unmatched JSON Entry** means there was an entry in the ACE that was not added because it did not match a scan. If the date is before today, it’s most likely a package that was shipped on a previous day (such as when you’re including manifests from previous days) and can safely be ignored. If the date is today, that means there are orders that *should* have been shipped today but no ticket was received. Consult the following page to check if the ticket was confirmed shipped but never received.  
<https://docs.google.com/spreadsheets/d/13eMd5QOAzYkaRhpenVI_7Byf831EJU7q7b7q74t_u4Q/>  
If you can’t confirm the ticket was shipped, the packages likely wasn’t shipped and can be ignored.

**Unmatched Batch** are much more serious. It means you received a pick ticket for a package going out today but did not provide the ACE data for that package.   
<http://stalco.techship.ca/Orders/Batches>  
Open the above link, set *Status* to “All”, and search the missing Batch #/Pick order #. In the search results, select the Batch. Under the “Manifest ID” column it will tell you a manifest. Go back to Manifest History and re-download the ACE and CSV Report with that manifest included. Re-run USTM with the new ACE/CSV Report. Do this until you stop getting unmatched batches

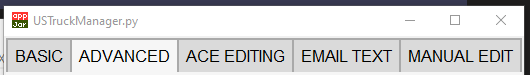
## Step 4. Proforma and Emailing

In the folder for today there should be a file that ends with “Proforma\_Template.xlsx”

Open SmartBorder:  
<https://sbweb.smartborder.com/>  
Click “Proforma”  
On the left, click “Import Proformas”   
Click “Next” as we are uploading this for Stalco  
Drag and drop the Proforma template on to the page. It should give you several warnings (lines are missing Unit of Measurement values). Click “Return to proformas list” and select the most recently upload. Click the bottom-right button, then “Verify”. In the top-right, it should show warnings for the lines. For each line, click on the warning  
  
  
Wait a moment, then enter “1” in to the Quantity field. Repeat for all lines that need adjustment  
Finally, review the entire Proforma to make sure everything is correct (especially the Total Gross Weight, which tends to be off compared to the BoL. The Shipping Quantity and Total Gross Weight need to match the values on the BoL)  
Save the Proforma, Post to Broker, wait a minute (until the box turns green) and Print. This will download a copy of the Proforma

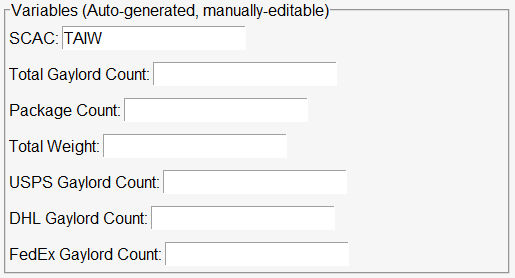
Return to USTM  
  
Upload the Proforma in the labeled box  
Now is a good time to review all the file generated to make sure they do not have errors  
If all the files were successfully generated, it will open 2 message boxes asking for your email account username and password. Once entered, USTM will automatically email all involved parties with the paperwork. Done!

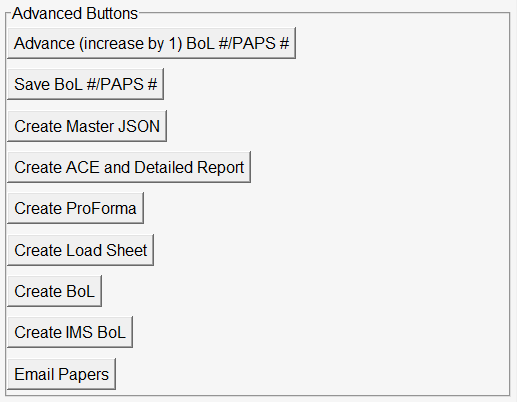
# Advanced Features

USTM supports multiple advanced features for when things go wrong.  
  
Basic

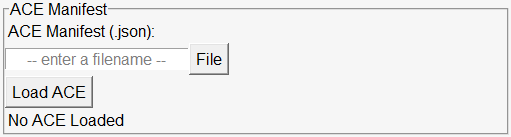
This is the basic UI covered above. On a problem-free day, it is the only page you will need to use.

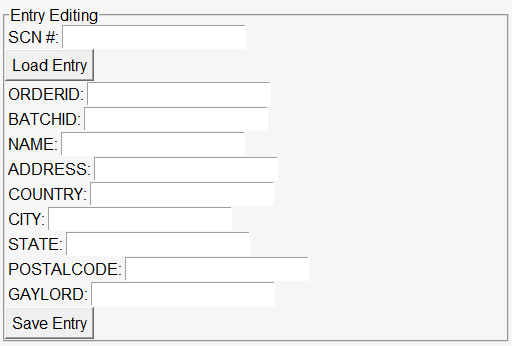
## Advanced

  
The top box contains values that are automatically generated while making the paperwork. These values can be edited when needed (such as when a different carrier is carrying the load, or when gaylords have been consolidated and the batch scans sheet lists more gaylords than loaded on to the truck)

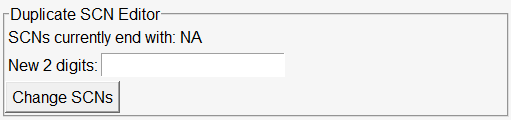
  
These buttons allow you to generate the paperwork one step at a time. Note that lower buttons tend to rely on higher buttons to be clicked first (eg. To produce the ACE you need the Master JSON created, etc).

## ACE Editing

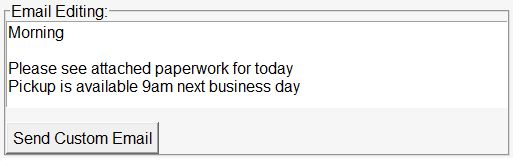
  
Upload the JSON file then click “Load ACE”  
If successful, the bottom line should update to “X ACE Entries loaded”

  
After the ACE has been loaded, you can enter in the SCN of an individual entry. Click “Load Entry” to see its contents. You can check/edit the values before saving with “Save Entry”.

  
When the FDA rejects a load, this tool can be used to remove those gaylords from the ACE manifest. Remember to use the same ACE you sent to Tri-Ad. Consult the Detailed Report to verify which gaylords contain items that necessitate the gaylord being removed.

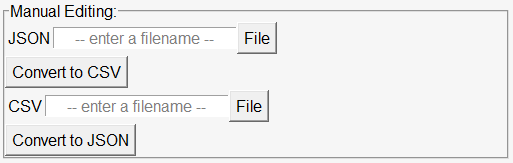
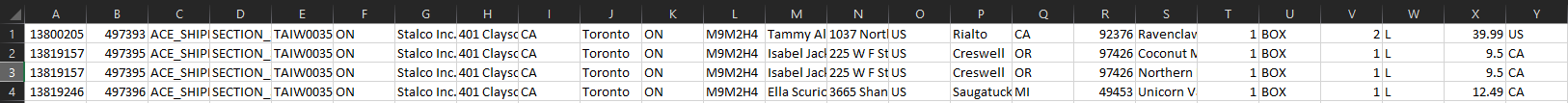
  
Occasionally Tri-Ad will get duplicate ACE entries. This happens when they upload an ACE containing entries, and then at a later date try to re-upload those entries on to a new shipment (such as trying to reship packages that were originally not allowed to cross eg. Any 321 packages in a gaylord that held FDA-regulated packages and needed to be held). If an ACE is loaded, the subtitle will read “SCNs currently end with: XX” where XX is usually 00. Enter in the new SCN ending (eg. 01) and click “Change SCNs” to save the ACE

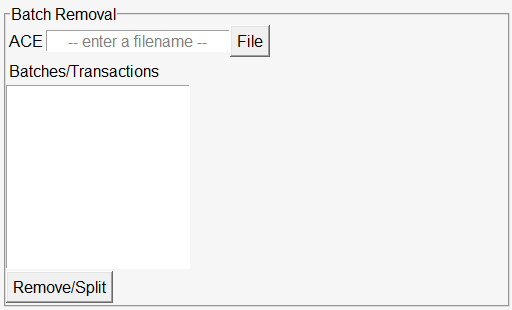
## Email Text

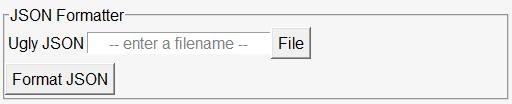
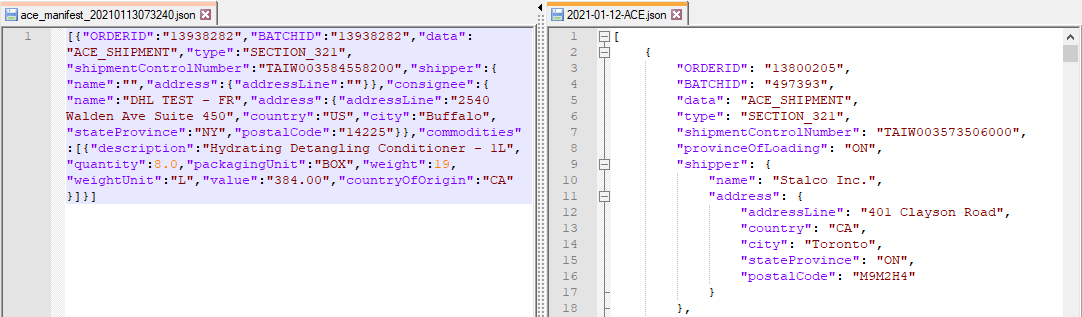
  
This page allows you to edit the message sent with the paperwork, instead of resorting to manually sending emails with corrected information. Note that the “Send Custom Email” button requires all forms to be generated and the ProForma to be uploaded on the first page.

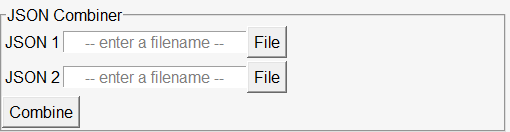
## Manual Edit

These tools are the ones you use when things go wrong.

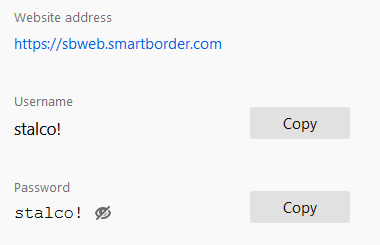
  
These two boxes allow one to convert ACE Manifests (JSON files) to CSV (openable in Excel). This allows for simplified editing, such as removing entire gaylords/products/clients from the ACE. The second tool allows you to convert the CSV back to JSON to be uploaded.  
  
Pictured: An ACE Manifest converted to JSON format

  
This tool allows you to remove specific batches/transactions from an ACE, such as when only a few orders from a batch can not be shipped due to missing product. Note that it splits the manifest in to 2: the first manifest contains all the entries that did not match, the second manifest contains the entries that did match.

  
This tool is used to make ACE manifests human-readable. It can also be used to check if a JSON is valid.  
  
Left: Sample unformatted JSON (from Techship)  
Right: Sample formatted JSON

  
This tool is used to combine 2 ACEs, such as when you removed orders from a previous day’s ACE and want to add them to today’s ACE.

# SmartBorder Login Details



# Paperwork

All files (except the ACE, as stated below) can be found in:

W:\Logistics\USPS Customs\USPS Customs Paperwork\IMS Invoices - Mixed Shipments\[YYYY]\[MM]\[Date]

Print and give to Driver:

- 1 copy of the first page of the ACE manifest provided by Brandy (usually by 10am Sunday)

- 1 copy of ProForma, stapled

- 1 copy Load\_Sheet.pdf

- 2 copies of IMS-BoL.pdf. Given to driver. Paperclip to:

- 1 copy of the DHL manifests, stapled

- 1 copy of the Stalco BoL, signed by you, stapled to the USPS manifests

- 1 copy of the Stalco BoL, signed by you, stapled to:

- 1 copy of Stalco\_BoL\_Labels.pdf, found in W:\Logistics\Tools or W:\Logistics\USPS Customs

Additionally, include the following:

- 1 copy of the DHL manifests, stapled to one of the DHL gaylords