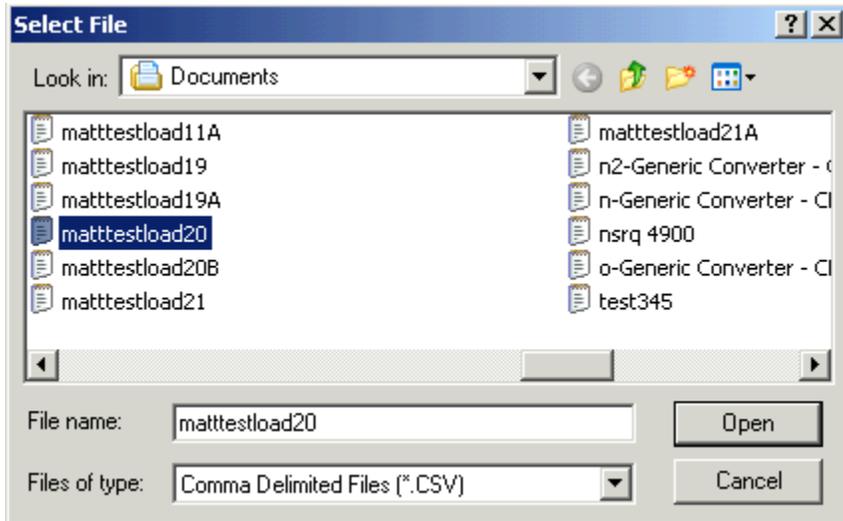
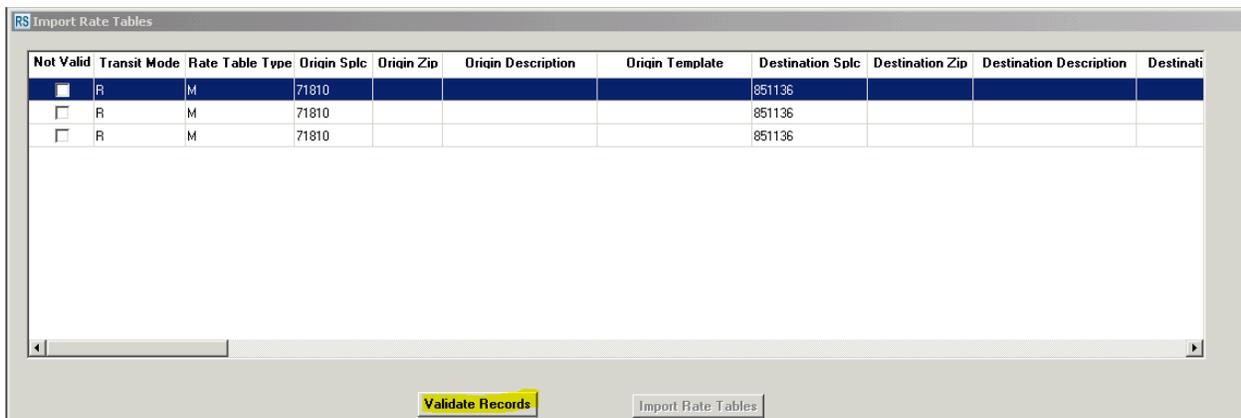


RateServer Rate Import Instructions

From Utilities->Rate Import Process, a pop up box will appear looking for the csv file to be imported. Locate the file from your hard drive and highlight it. Select Open.



The data on the file will show up on the Import Screen. Press Validate Records to begin.

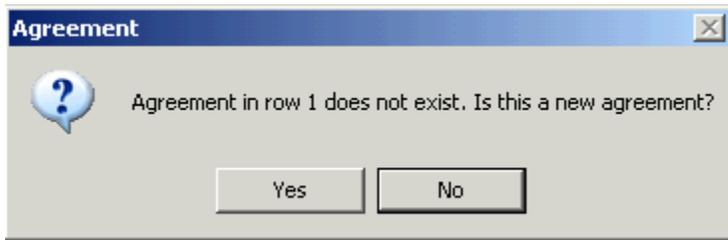


The first question the process will ask is if the user wants to create Non Rule 11 rate codes from the Non Rule 11 rates, if any, on the csv file.



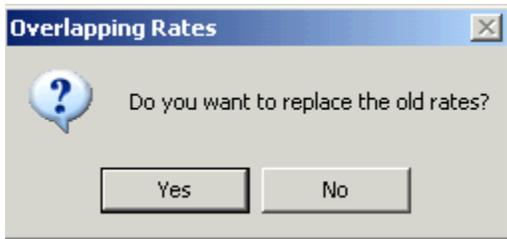
Select No to skip this. Select Yes to do so. This is exactly like the automatic creation of rate code process that occurs after entering a Non Rule 11 rate manually in RateServer. Note that if the user selects Yes and PC Miler Mileage lookup is active in RateServer, the process will also check for fuel miles and add any missing ones to the Rail Miles table automatically based on the rate code being created. A pop up box asking for the station may appear when this occurs. Select the appropriate one to continue.

Once the rate code process is done or skipped, a pop up box may appear notifying the user that the agreement in a row could not be found, asking if this is a new agreement.



This is normal for a new agreement or an existing agreement with a new revision number. The user should respond with Yes to proceed. If it isn't a new agreement, the user should check the agreement number, Contract Carrier, Rate Carrier, and version number on the csv file, compare to the existing agreement in RateServer, make any necessary corrections, and start the Import Process over.

Next, RateServer will check for overlapping rates. If the process finds any, a pop up box will ask if the user wants to replace the old rates.



Pressing No will cause the Validation Process to fail as it is programmed to not allow overlapping rates to be loaded. The user should review the spreadsheet and the existing rates to determine the issue, make the necessary corrections, and restart the import process from the beginning.

Pressing Yes will cause the Validation Process to alter the dates on the existing rates in a manner that the new rates can be loaded. There are a number of outcomes that may occur, depending on the circumstances. Please refer to the Overlapping Rates spreadsheet that outlines the different circumstances and outcomes.

From here, the Validate Records process will now review the data on the csv file row by row to make sure the data on the spreadsheet is valid (SPLCs, Locations, Commodity Classes, Agreement Number, Unit of Measures, Route, etc.). If it finds an error, a pop up message will advise the user of the error and ask if the user wants to continue validating.

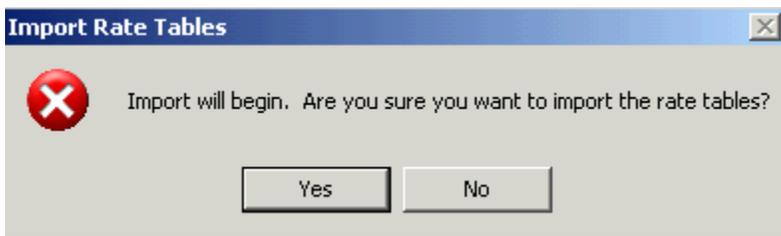


Note that the error will need to be corrected accordingly, whether it is on the csv file, or in RateServer. In this case, the user would either need to correct the SPLC on the csv file or add the missing SPLC to the SPLC table in RateServer.

Once RateServer is able to validate the records successfully, the Import Rate Button will no longer be greyed out and the user can now press the button.



Pressing the button will bring up a confirmation message to verify the rates are to be imported.



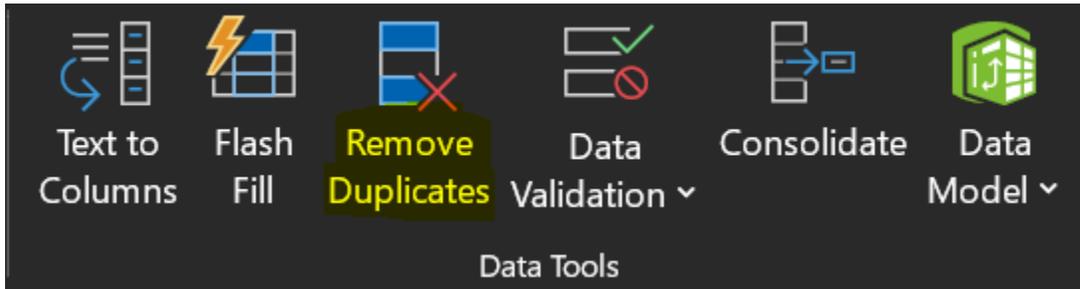
Select Yes to import, No to not. If successful, the Successfully imported message will appear. Selecting No will return the same message but no rates will be imported.



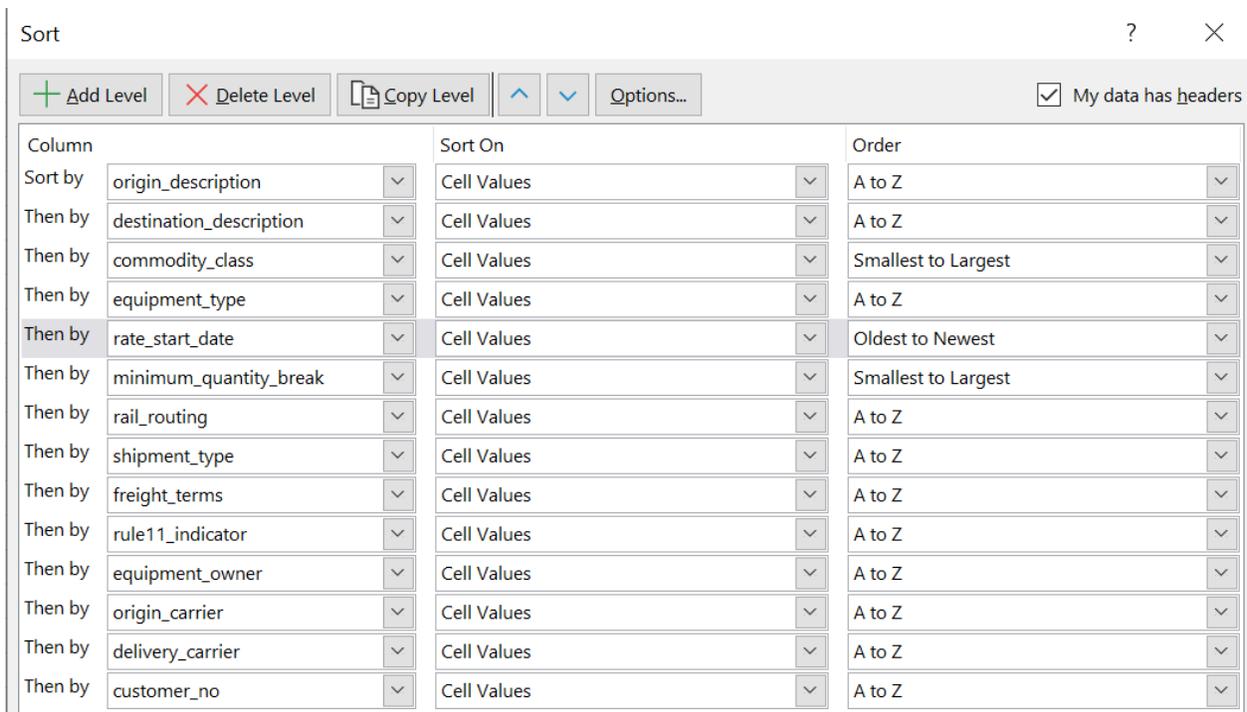
Hitting OK will close the Import Rate Tables screen and the user can then go into the agreement to verify the data was uploaded, if Yes was previously selected.

If it failed, an error message will appear. There is a possibility that duplicate rates may be on the csv file.

Excel has a remove duplicates function that can be run on the Data bar.



Another check is to sort the data on the spreadsheet by these fields (noting if using origin/destination templates, zip codes, or SPLCs only, sort by those instead in the first two).



Then in a blank column like column L, put this formula in that compares the values between those fields between rows in the first row of data (L2)

```
=IF(AND(F2=F3,J2=J3,M2=M3,N2=N3,U2=U3,Z2=Z3,AP2=AP3,AT2=AT3,AU2=AU3,AV2=AV3,AW2=AW3,AX2=AX3,AY2=AY3,AZ2=AZ3),"POT DUP","")
```

Again, if using origin/destination templates, zip codes, or SPLCs, replace the F2=F3 and J2=J3 with the appropriate fields for comparison. D2=D3, E2=E3, etc.

Drag or copy that formula down that column in each row and look for anything flagged as POT DUP. Here, these may have different rates but match otherwise so either something on them like a rule 11, delivery carrier, or customer number needs to be changed to make them separate, or one rate needs to be removed so that the spreadsheet can be imported.

155	R	P	647000	NEW ORLEANS, LA	414934	CLAREMONT, NC		28211 ALL	NS	NS
156	R	P	647000	NEW ORLEANS, LA	191040	CLIFTON, NJ		28211 ALL	NS	NS
157	R	P	647000	NEW ORLEANS, LA	424470	CLINTON, TN	POT DUP	28211 ALL	NS	NS
158	R	P	647000	NEW ORLEANS, LA	424470	CLINTON, TN		28211 ALL	NS	NS
159	R	P	647000	NEW ORLEANS, LA	353103	COLUMBUS CAMP CH		28211 ALL	NS	NS

Once fixed, remove the formula from the fields, save, and it should import. If there is still an issue, RS_Support should be contacted for assistance.