Data import: what, why, how

A comprehensive guide to importing business data into Qargo using prebuilt templates, outlining the general process and critical requirements for a smooth setup.

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Importing existing business data into Qargo makes account setup both fast and accurate. Organizations can use the provided Excel templates to upload information in bulk instead of manually creating each company, driver, or vehicle. This article outlines the entire process, from data preparation to troubleshooting common issues.

📖 Key terminology

The key terms used throughout this article are defined below.

- **Qargo tenant:** A specific, isolated instance of the Qargo platform where a company's data is stored and managed.
- **Sandbox tenant:** A testing environment for a Qargo tenant. It is a safe place to experiment, test workflows, and import data without affecting the live operational environment.
- **Accounting code:** A unique identifier from an accounting system. It links a customer in Qargo to the matching entry in the accounting software.
- **Contract carrier:** A third-party company or individual engaged to perform transportation tasks. In Qargo, the drivers and vehicles of contract carriers can be managed just like an organization's own.
- **Resource:** A term used to describe a driver, a vehicle, or a combination of both.

✅ Critical import requirements and warnings

Review these essential requirements before starting an import. Failure to comply can lead to errors and duplicate data.

1. **Company import is a prerequisite for contacts:** Companies **must** be imported first. The contact import template requires a valid company name and accounting code to link each contact to a specific company.
2. **Contract carriers first:** To import a driver or vehicle that belongs to a contract carrier, that contract carrier must first be created as a company in Qargo. The driver and vehicle import templates require a valid contract carrier name to link the resource.
3. **The accounting code is crucial:** Qargo uses the **accounting code** to identify and update existing customers. If a customer is re-imported with the same name but a different or missing accounting code, Qargo creates a **duplicate** customer entry. This is a common issue when migrating from one accounting system to another.
    - **Pro tip:** Use test customers during the initial setup. Once the accounting codes are finalized, import the full, clean customer database **before** going live to avoid duplicates.

🛠️ Step-by-step data import process

Follow these steps to import data successfully.

Step 1: Download the correct template

A specific Excel template is available for each data type to import. The templates are available here:
Company data import template
Contact data import template.xlsx
Driver data import template.xlsx
Vehicle data import template.xlsx

Container data import template.xlsx
Product data import template.xlsx
Validity data import template.xlsx
Location data import template doc.xlsx

> 📚 Always use a **blank template** downloaded directly from this article or provided by the Qargo team. Reusing an old template may lead to import errors.

Step 2: Fill in the Excel template

Open the template and fill it in with the required data. The template contains column headers that correspond to the fields in Qargo.

- **Required fields:** Fill in all the required fields (they are listed in the articles in the "Detailed import articles" section of this article). An import fails if these fields are left blank.
- **Formatting:** Pay close attention to the specified data format (for example, dates, numbers, text).

Step 3: Submit for upload

1. **During onboarding:** Work directly with the **onboarding manager** to upload the initial business data. The onboarding manager guides the process and ensures a successful import.
2. **After onboarding:** For all future data updates and imports, contact the **account manager**. The account manager helps with the upload process and provides ongoing support.

🔎 Troubleshooting common errors

Errors are common on the first import attempt. They are usually easy to fix.

1. **Error log spreadsheet:** The spreadsheet with the error log gives a clear breakdown of the issues. For example, it might say "Enter a valid URL" or "Company must have a type".
2. **Fix and re-upload:** Open the original Excel file, correct the identified errors, and save the file. Then re-upload the corrected file. Qargo runs the validation again, and the import proceeds.
3. **Case-sensitive column headers:** Column headers must use the correct casing (for example, `vat_number`, not `VAT_number`). With incorrect casing, the system does not recognize the header, so the data in that column is silently ignored and not imported.
4. **Leading apostrophe errors:** Data in a cell cannot begin with an apostrophe ('). If an apostrophe is used, the system does not recognize the value, and an error may occur. **This rule does not apply only if the article explicitly says to use an apostrophe for a specific field.**

Resolving common error messages during data import in Qargo

Configuration-related error messages may appear when importing data into Qargo, as detailed below:

1. **"Unknown customer" error:** This error occurs when the customer name in the import file does not match an existing customer in Qargo. **Resolution:** Check the customer name in the file, make sure the customer is already configured in Qargo, and correct any discrepancies before re-uploading.
2. **"Unknown transportation service" error:** This error means that the transportation service listed in the import file is not set up in Qargo. **Resolution:** Check and correct the transportation service name or add it to Qargo, then re-upload.
3. **"Unknown location" error:** This error occurs when a location in the import file does not exist in the Qargo setup. **Resolution:** Check and correct the location name or create the location in Qargo before re-uploading.

Summary: These errors are caused by mismatches between the import file and the Qargo setup. Always align the data with the Qargo configuration and use the error messages as guides to resolve mismatches efficiently.

🔗 Detailed import articles

For more in-depth information on a specific data type, click the links below. Each article contains a detailed breakdown of the template's fields, specific requirements, and best practices.

- **Importing companies**

A comprehensive guide to importing company data. This is the foundational step for populating a Qargo tenant with customers, suppliers, and contract carriers.

Company data import article

- **Importing contacts**

A comprehensive guide to importing contact data. This import links individuals to companies already in the system and ensures an accurate database for communication.

Contact data import article

- **Importing drivers**

A comprehensive guide to importing driver data. This import allows the bulk creation of both internal and contract carrier drivers. It is a critical step in preparing the Qargo system for dispatch.

Driver data import article

- **Importing vehicles**

A comprehensive guide to importing vehicle data. This import allows the bulk creation of vehicles that belong to the organization and its contract carriers. It is a crucial step in preparing the fleet for assignment.

Vehicle data import article

- **Importing containers**

A comprehensive guide to importing container data. This process allows the bulk creation of containers that belong to the organization and its contract carriers. It provides a ready-to-use catalog for order creation.

Container data import article

- **Importing products**

A comprehensive guide to importing product data. This process populates the product catalog in bulk, streamlines order creation, and ensures consistent descriptions and units of measure.

Product data import article

- **Importing validity data**

A comprehensive guide to importing validity data. This process updates the expiration dates of documents and certificates for drivers and vehicles in bulk.

Validity data import article

- **Importing order data**

A comprehensive guide to importing order data. This import allows the bulk creation of orders for both sandbox and live tenants. It is useful for data loading, system integration, and testing.

Order data import article

- **Importing location data**

A comprehensive guide to importing location data. This import allows the bulk import of locations, along with aliases for external integrations and stop prefill configurations.

Location data import article

📚 Onboarding managers and account managers can help with creating combinations. To help with the preparation, provide the following details for the drivers and vehicles to combine:

Column name	Required/optional	Remarks	Example
Vehicle_name	Required	Name as used in vehicle_import	12BLT2
Driver_name	Required	Name as used in driver	Steve Johnson
always_on_planning	Required	To be displayed every day on the planning board	TRUE

❓ FAQ

Click the button below to open the data import FAQ article.

Data import FAQs

📝 Use cases

Data import streamlines onboarding and data management. Below are some common scenarios where data import is invaluable:

- **Initial setup:** During onboarding, all existing business data can be imported at once to prepare the Qargo tenant for use.
- **Testing workflows:** Before going live, a sample data set can be imported into the **sandbox tenant** to test new features or train a team. This provides a risk-free environment to get familiar with the platform.
- **Regular updates:** Data for resources such as vehicles or containers can be imported periodically as a fleet grows or changes.