Data import: importing container data

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

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Importing container data allows for the bulk creation of containers, which can belong to either the user's own company or a contract carrier. This is a critical step for organizations that manage their own container fleets, as it provides a readily available database for use in order creation. This article outlines the specific requirements, best practices and common issues related to importing container data.

📖 Key terminology

For clarity throughout this guide, the following terms are defined.

- **Container:** A reusable transport and storage unit.
- **Container no.:** The unique identifier for a container.
- **Contract carrier:** A company that owns or operates a container.
- **Code:** A unique identifier for a container from an external system, which can be used to ensure accurate data updates.

✅ Critical import requirements for containers

Before importing container data, consider the following requirements and warnings to ensure data integrity.

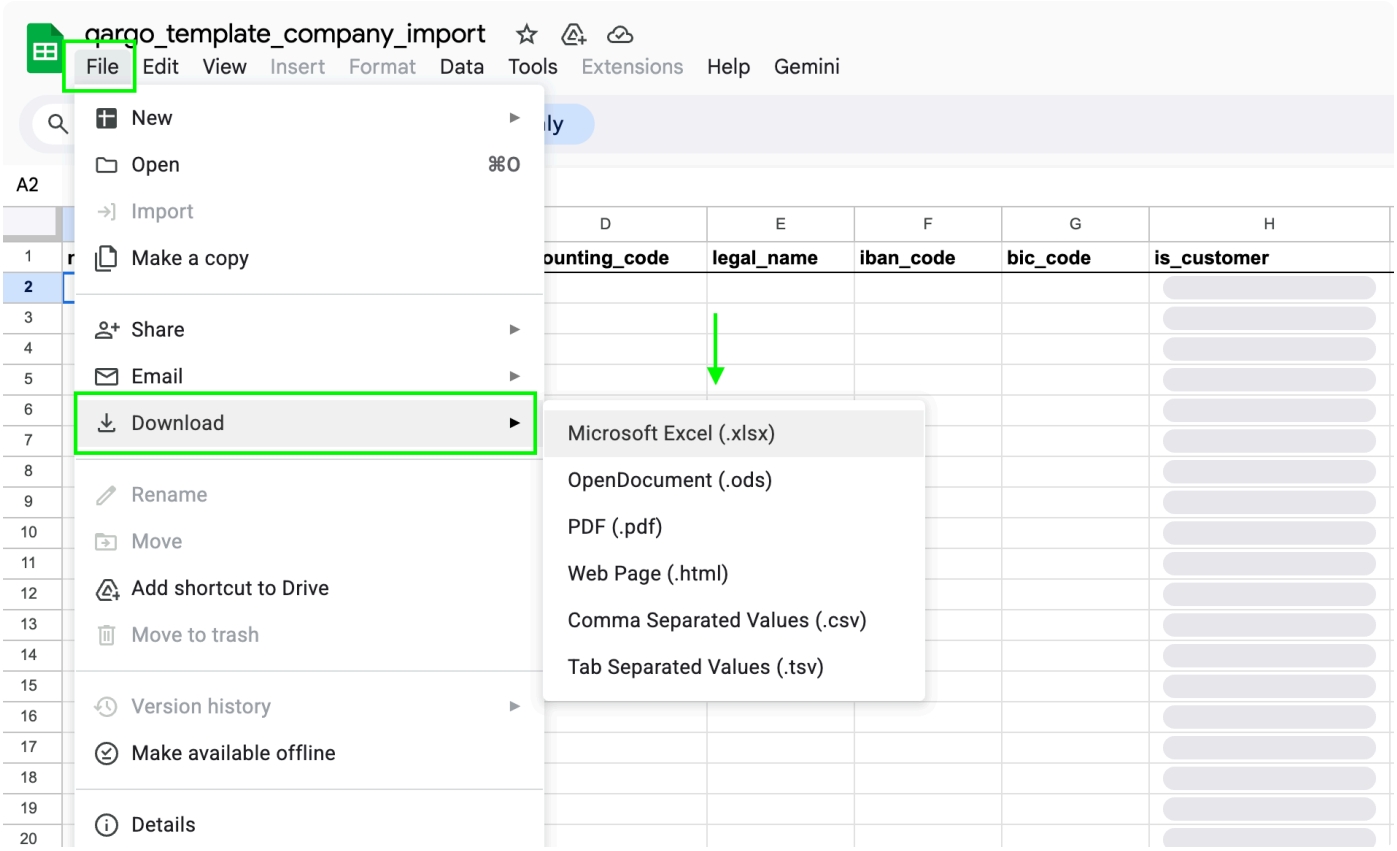
- **Contract carrier prerequisite:** Before a container belonging to a contract carrier can be imported, the contract carrier's company record **must** already exist in the Qargo system. The import will fail if the specified contract carrier cannot be found.
- **Unique identification:** Qargo identifies existing containers by their unique **container no.**
- **Mandatory field:** The container **name** is a mandatory field. An import will fail if this is left blank.

🛠️ Step-by-step data import process

Step 1: Download the template

A specific spreadsheet template is available to upload container data. **To make sure the data can be edited and uploaded, download a copy of the template:**

1. Click the link: Container data import template
2. Once the template opens, go to **File** and select **Download**
3. Save the template **(in .xlsx or .csv format)** to a computer and begin entering the company data.



📚 Always use a blank template downloaded directly from here 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 populate it with the required data. The template contains column headers that correspond to the fields in Qargo.

- **Required fields:** Make sure to fill out all the required fields (a comprehensive list of required fields can be found in the next section of this article). An import will fail if these fields are left blank.
- **Formatting:** Pay close attention to the specified data format (e.g., 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 will guide the process and ensure a successful import.
2. **After onboarding:** For all future data updates and imports, contact the **account manager**. The account manager will assist with the upload process and provide ongoing support.

📝 Details of the container import template

The following table provides a detailed, field-by-field explanation of the Excel template for container import, including data formats, required fields and best practices for populating each column.

Column name	Required/optional	Remarks	Example
name	Required	Container name displayed in Qargo	
code	Optional		
manufacturer	Optional		Exagon
container_number	Optional		1212
standard_size	Optional		Feet_25
note	Optional		
subcontractor_company	Optional		
gross_weight	Optional	Metric tons	1
tare_weight	Optional	Kilograms	1.0
capacity_volume	Optional	CBM	1.000
capacity_weight	Optional		1
exterior_length	Optional	Meters	1.000
exterior_width	Optional	Meters	1.000
exterior_height	Optional	Meters	1.000
custom_fields__example	Optional	To import custom field values. Note: the format uses a double underscore (`__`) to connect the prefix **custom_fields** to the unique field ID	

Standard size: accepted values

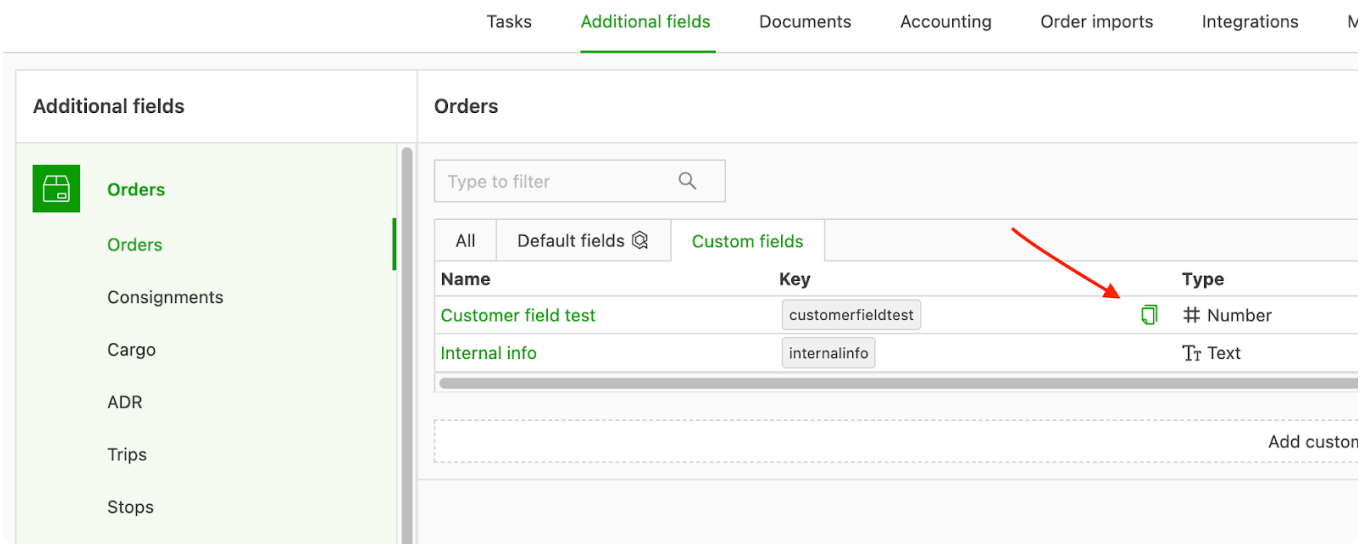
The `standard_size` column accepts the following values. The format must match exactly (the field is not case-sensitive, but the underscore and capitalization pattern below is recommended):

Value	Size
`Feet_20`	20 ft
`Feet_23`	23 ft
`Feet_24`	24 ft
`Feet_25`	25 ft
`Feet_26`	26 ft
`Feet_30`	30 ft
`Feet_35`	35 ft
`Feet_40`	40 ft

🔎 Troubleshooting common container import errors

This section addresses specific errors that may arise during the import of container data.

- **Contract carrier record not found:** This is the most common error for containers owned by contract carriers. It occurs when the name of the **contract carrier company** in the template does not exactly match an existing company in Qargo. The contract carrier must exist in the system before its containers can be imported.
- **Sheet name:** The sheet in the Excel template file must be named exactly **'Import'**. Any other name will cause an error when uploading the file.
- **Missing mandatory field:** The import will fail for any row where the **container** name is left blank.
- **Case-sensitive column headers:** Column headers must be entered with the correct casing (e.g., `vat_number`, not `VAT_number`). Incorrect casing will cause the data in that column to be silently ignored and not imported, as the system will not recognize the header.
- **Leading apostrophe errors:** Data in a cell cannot begin with an apostrophe ('). If an apostrophe is used, the system will not recognize the value, and an error may occur. **This rule is waived only if the article explicitly instructs that an apostrophe should be used for a specific field.**
- **Custom fields:** The column name must follow the convention **custom_field__[ID]** (keep the double underscore to connect the prefix **custom_field** to the unique field ID), with the specific ID retrieved from the Qargo organization settings. Click the copy button next to the custom field to copy its ID:



✨ Best practices for importing containers

To ensure a smooth and accurate import, consider the following best practices.

- **Make sure contract carrier data is complete:** Before importing contract carrier containers, verify that all associated contract carriers have already been successfully imported into the system as companies.
- **Maintain data consistency:** Pay close attention to the spelling and capitalization of **contract carrier names** and **container nos.** Any inconsistencies will cause the link to fail.
- **Use the container's code:** Although optional, using the container **code** field is highly recommended. It provides a reliable way to update container records and prevents conflicts that can arise from duplicate numbers.

➡️ What to do next

Once containers have been successfully imported, they can be used in order creation. The next logical steps include:

- **Importing products:** If required, products used in order creation can be imported in bulk.
- **Importing orders:** A sample set of test orders can be imported to populate a sandbox environment.

📈 Use cases for container import

Importing container data is an invaluable tool for several key business processes.

- **Initial fleet setup:** The primary use case is to populate a Qargo tenant with an entire fleet of containers, including both owned containers and those from regular contract carriers.
- **Onboarding a new fleet:** When a new business unit or fleet of containers is acquired, its details can be added in bulk to the Qargo system.