



MYBILL CSV GUIDE

NEW FILE FORMAT &
CUSTOMIZATION

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INTRODUCTION TO THE NEW CSV FORMAT & CUSTOMIZED CSV FILES

NEW CSV FORMAT 2.0 IN MYBILL

The new MyBill online portal offers a user-friendly way to manage your transport invoices and now features an optimized CSV format just for you. The new CSV version 2.0 will be available on MyBill starting November 12, 2018.

If the transport invoices you receive normally include a CSV file sent by email, nothing will change. The CSV files, however, will have a somewhat different structure. To make it easy for you to become familiar with the new structure, we have created some sample CSV files in the old and new formats that you can download to see what's new.



CUSTOMIZED CSV FILES

As a standard feature now with MyBill, you will receive a CSV file in the new 2.0 format containing all the fields shown in the sample file above. If you only need specific fields and would like the files to contain only the information relevant for you, MyBill lets you customize your CSV files.

The data file(s) will then be abridged according to your specifications and the data will be displayed in the order you indicate. If you receive more than one invoice, the files can also be strung together (consolidated). That makes it easier for you to import CSV exports into your accounting systems.

This guide will show you the easy way to customize your CSV files by creating a new, unique CSV template.

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CREATING A CUSTOMIZED CSV TEMPLATE



All it takes is four easy steps:

- **Step 1:** Click the “Invoicing” tab to access that page and then select the invoice(s) you would like to download in CSV format by checking the boxes to their left.
- **Step 2:** Click on “Download” and you will be automatically forwarded to the Downloads Selection page.
- **Step 3:** Here click on “Customize Format”. This will take you to the CSV Configuration page.

The image shows two overlapping screenshots of the DHL MyBill web interface. The left screenshot is the 'Invoicing' page, and the right screenshot is the 'Download Selection' page. Red dashed boxes and arrows highlight the steps: selecting invoices and clicking 'Download' in the Invoicing page, and clicking 'Customize Format' in the Download Selection page.

Invoicing Page: The 'Invoicing' tab is selected in the navigation bar. A search bar is present. Below it, a 'Download' button is visible. A table with columns 'ACCOUNT NO.' and 'ACCOUNT NAME' is shown. Three rows are checked. A red dashed box highlights the checked rows with the text: "Select invoices and click on 'Download'".

Download Selection Page: The 'Downloads' tab is selected in the navigation bar. The page title is 'Download Selection'. Below the title, there is a 'Go back a page' link. Under 'Download Preferences', there is a note: "Please select your download preferences below. Please note: Summary Posting information, indicated by [icon] is only available in the Transaction Report. No backup document can be retrieved in MyBill for these records." Under 'Select DHL Express Downloads', there are several options: PDF Invoice, Standard CSV, XML, Waybill / Commercial Invoice / Entry Documents, and Transaction Report. The 'Concatenated' option is selected, and the 'Customise Format' button is highlighted with a red dashed box and the text: "Click on 'Customize Format'".

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CONFIGURING A CUSTOMIZED CSV TEMPLATE



Step 4: Options for configuring CSV files on the CSV Configuration page

- **To remove data** from your CSV file, click on those items in the “Selected Column Header” list that you do not need in the CSV file and drag them over to the “Available Column Header” field.
- **To change the order** in which they are displayed, click on a header in the “Selected Column Header” list and move it to the desired position, i.e. higher or lower.
- Once you have made your selection(s) and **saved the data**, click on **“Done, apply settings”**.

The screenshot shows the DHL MyBill CSV Configuration page. The page is divided into several sections:

- CSV Configuration:** Includes a "Go back a page" link and a "Currently active configuration: None" status.
- Pre-saved configurations:** A list of configurations with "Load" and "Delete" buttons. A callout indicates this section "Shows pre-saved configurations".
- Available Column Header:** A list of column headers that are not currently selected. A callout indicates these are "Column headers that don't appear in the file".
- Selected Column Header:** A list of column headers that are currently selected for the CSV file. A callout indicates these are "Column headers that do appear in the file".
- Export options:** Includes a "Sort order" dropdown menu (set to "By Product, followed by Origin") with a callout "Select order in which invoice data is to be listed". It also has a "Concatenated" checkbox (unchecked) with a callout "Consolidate more than one invoice (when selected)". There is a "Use for email attachments" checkbox (unchecked) with a callout "Check box to receive a customized CSV file by email". A "Save all settings for later?" checkbox (checked) has a callout "Save the template settings for future use".
- Buttons:** "Done, apply settings" (highlighted with a callout "Save & apply settings"), "Cancel", and "Save".

