

USER GUIDE



CIO Converting Machine

Declaration file in, BULK Upload Template out.

What this tool does

The Converting Machine takes the declaration file you already work with and turns it into a ready-to-use BULK Upload file — automatically. No manual re-typing, no reformatting. You upload, it converts, you download.

Three steps, start to finish

Upload your file → the system converts it automatically → you download the finished BULK file. Most files need no extra input at all.

Where to find it

The Converting Machine is built into Cargo Insure Online. Log in to your CIO account as usual — the tool opens directly from within the platform, using your existing session. There's nothing separate to log into.

Supported files

Accepts standard declaration formats (.xls and .xlsx). The system automatically recognizes the layout of your file — you don't need to tell it anything.

Your data stays yours

Uploaded files and converted output are never stored. Nothing you upload is visible to any other company using the tool.

Step by step

Here's exactly what happens at each stage.

1

Upload your file

Drag and drop your declaration file onto the upload area, or click to browse for it on your computer. Accepted formats: .xls and .xlsx.

2

Automatic conversion

Click Convert. The system reads your file, recognizes its layout, and maps every field into the BULK Upload format automatically — including:

- Product HS codes, classified automatically based on the cargo description
- Transport type, dates, currency, and country fields
- Insured company details

3

Review — only if needed

If everything mapped cleanly, you'll go straight to your download. If a handful of rows need a quick check (for example, an HS code the system isn't fully confident about, or a missing email address), you'll see exactly those — nothing else. Resolve them and continue.

4

Download

Your finished BULK Upload file is ready to download immediately — formatted and ready to use. Need to convert another file? One click starts you over.

If a row needs your input

The system is built to ask for as little as possible, and to remember what you tell it so you're asked even less next time.

HS CODE

When the system isn't fully confident

You'll see the suggested code along with its confidence level. If it looks right, simply tick the box to accept it — no retyping needed. If you'd rather enter a different code, just type it directly. Either way, your answer is remembered, so the same product won't need reclassifying on your next upload.

MISSING EMAIL

When a company's email isn't in your file

Companies needing an email are grouped together — you only see each company once, even if it appears across several shipments. Enter it individually, or use "Apply to all remaining" if you'd rather use one address for everything still outstanding. Once confirmed, it's remembered for next time — that company won't be flagged again.

The list only shows what needs you

Rows that mapped cleanly are never shown here — you only ever see what actually needs a decision, and the list shrinks in real time as you resolve each one.

Common questions

What file formats can I upload?

Standard Excel declaration files (.xls or .xlsx). The system recognizes several known layouts automatically, and can also learn a new layout the first time it sees one — you may be asked to confirm a suggested field mapping the first time, after which it's remembered.

What if my file's format isn't recognized at all?

You'll see a clear message rather than an incorrect conversion. If this happens repeatedly with a file you expect to work, contact your CIO representative.

Can I trust the suggested HS codes?

Suggestions are shown with a confidence level. High-confidence suggestions are pre-filled for you to confirm; lower-confidence ones ask you to actively accept or correct them before continuing — nothing is applied silently without your review when confidence is low.

Will I need to log in again to use this tool?

No. It opens directly from your existing CIO session — there's no separate username or password.

Can other users see my uploads or history?

No. Nothing you upload is stored, and no other company can ever see your data. There's also no history log — each conversion is independent.

What language does the tool use?

It automatically matches whichever language you're using on Cargo Insure Online.