Carriers

Contents

1 Carriers

This screen allows you to maintain the carriers in the system. You can use carriers created here in many places in the system, including:

- Trips.
- Routes.
- Drivers.
- Vehicles.
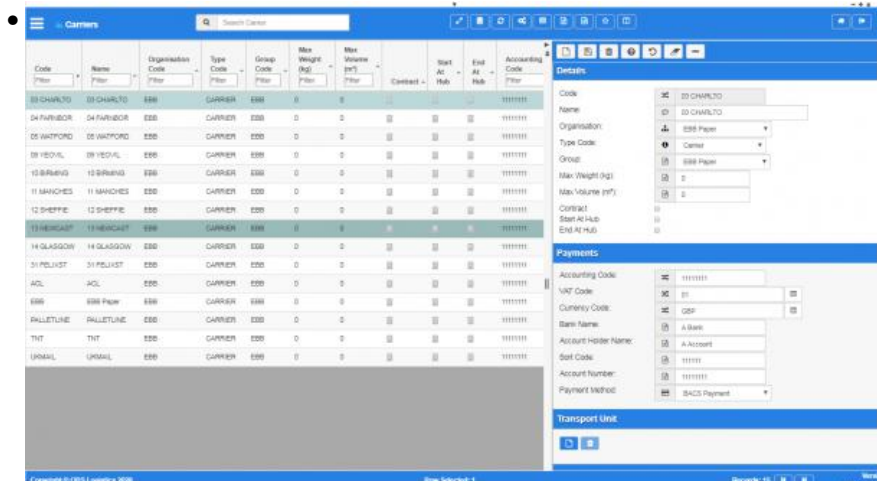
Carriers

You can query data by and/or choose to display data as follows:

- *Code.*
- *Name.*
- *Organisation Code.*
- *Type Code.*
- *Group Code.*
- *Max Weight (kg).*
- *Max Volume (m³).*
- *Contract.*
- *Start At Hub.*
- *End At Hub.*
- *Accounting Code.*
- *VAT Code.*
- *Currency Code.*
- *Bank Name.*
- *Account Holder Name.*
- *Sort Code.*
- *Account Number.*
- *Payment Method.*
- *Active.*
- *Created By.*
- *Created Date.*
- *Last Updated By.*
- *Last Updated Date.*
- *Last Active Change By.*
- *Last Active Change Date.*
- *Last Process Id.*
- *Update Counter.*

The following actions are available on the Details panel:

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- 🗋 **New** - create a new record.
- 🖫 **Save** - save a new record or changes to an existing record.
- 🗑 **Delete** - delete an existing record.
- ⑦ **Help** - help on this screen.
- ↺ **Undo** - undo change made since last save.
- ✐ **Clear** - clear all fields.
- ⁻ **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

1.1 Details section

- *Code* - the carrier code.
- *Name* - the carrier name.
- *Organisation Code* - a drop-down list of all organisations in the system. You can maintain organisations in the Organisation screen.
- *Type Code* - a drop-down list of all carrier types in the system. You can maintain carrier types in the Carrier Type screen.
- *Group Code* - a drop-down list of all carrier groups in the system. You can maintain carrier types in the Carrier Group screen.
- *Max Weight (kg)* - the maximum consignment (order) weight carried by this carrier.
- *Max Volume (m³)* - the maximum consignment (order) volume carried by this carrier.
- *Contract* - a check box indicating contract.
- *Start At Hub* - a check box indicating that trips assigned to the carrier start at a defined hub location.
- *End At Hub* - a check box indicating that trips assigned to the carrier end at a defined hub location.

1.2 Payments section

- *Accounting Code*.
- *VAT Code* - the carrier's VAT code. You can enter the VAT code or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all VAT codes configured in the system. You can enter a VAT code by clicking the entry in the table or cancel by closing the window.
- *Currency Code* - the carrier's currency code. You can enter the currency code or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all currency codes configured in the system. You can enter a currency code by clicking the entry in the table or cancel by closing the window.
- *Bank Name*.
- *Account Holder Name*.
- *Sort Code*.
- *Account Number*.
- *Payment Method* - a drop-down list of all payment methods configured in the system. You can maintain payment methods in the Payment Method screen.

1.3 Transport Unit section

You can set whether certain transport units are allowed or not allowed.

You can add whether transport units are allowed by clicking the 🗋 **New** button in the section. The screen will display a pop-up window to enter the following:

- *Transport Unit* - the transport unit. You can enter the transport unit or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure transport units in the Transport Units screen.
- *Allowed* - a check box controlling whether the transport unit is allowed or not.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

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You can delete an existing transport unit by selecting the transport unit row in the table and then clicking the 🗑 **Delete** button in the section header.

1.4 Product Type section

You can set whether certain Product Types are allowed or not allowed.

You can add whether Product Types are allowed by clicking the ▯ **New** button in the section. The screen will display a pop-up window to enter the following:

- *Product Types* - the product type. You can enter the product type or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure product types in the Product Types screen.
- *Allowed* - a check box controlling whether the product type is allowed.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing product type by selecting the product type row in the table and then clicking the 🗑 **Delete** button in the section header.

1.5 Location Zone section

You can set whether certain location zones are allowed or not allowed.

You can add whether location zones are allowed by clicking the ▯ **New** button in the section. The screen will display a pop-up window to enter the following:

- *Location Zone* - the location zone code. You can enter the location zone or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure location zones in the Location Zones screen.
- *Allowed* - a check box controlling whether the location zone is allowed.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing location zone by selecting the location zone row in the table and then clicking the 🗑 **Delete** button in the section header.

1.6 Operating Location section

You can set whether certain locations are allowed or not allowed.

You can add whether locations are allowed by clicking the ▯ **New** button in the section.

You can edit an existing location by selecting the location row in the table and then clicking the ✏ **Edit** button in the section header.

The screen will display a pop-up window to enter the following:

- *Locations* - the location code. You can enter the location code or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure locations in the Locations screen.
- *Allowed* - a check box controlling whether the location is allowed.

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You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing location by selecting the location row in the table and then clicking the 🗑 **Delete** button in the section header.

1.7 Vehicle Type section

You can set whether certain vehicle types are allowed or not allowed.

You can add whether vehicle types are allowed by clicking the 🗋 **New** button in the section.

You can edit an existing vehicle type by selecting the vehicle type row in the table and then clicking the ☑ **Edit** button in the section header.

The screen will display a pop-up window to enter the following:

- *Vehicle Type* - the vehicle type. You can enter the vehicle type or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure vehicle types in the Vehicle Types screen.
- *Allowed* - a check box controlling whether the vehicle type is allowed or not.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can delete an existing vehicle type by selecting the vehicle type row in the table and then clicking the 🗑 **Delete** button in the section header.

1.8 Service Level section

You can set the service levels allowed here.

You can add the service levels allowed by clicking the 🗋 **New** button in the section. The screen will display a pop-up window to enter the following:

- *Service Level* - the service level. You can enter the service level or select it from a list using the ⊞ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure service levels in the Service Level screen.

You can save your changes with the **Save** button, or discard your changes by closing the window.

You can delete an existing service level by selecting the service level row in the table and then clicking the 🗑 **Delete** button in the section header.

1.9 Contacts section

You can add any number of contacts here.

You can add a contact by clicking the 🗋 **New** button in the section.

You can edit an existing contact by selecting the contact row in the table and then clicking the ☑ **Edit** button in the section header.

The screen will display a pop-up window to enter the following:

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- *Title.*
- *Forename.*
- *Surname.*
- *Job Title.*
  - *Contact Mediums* - a list of all contact media for the customer.
  - *Primary Phone.*
  - *Primary Email.*
  - *Primary Mobile.*

You can add additional contact media by selecting the media type from the drop-down list. The screen will add the medium to the Contact Mediums list above. Additional contact media:

- *Email.*
- *Fax.*
- *Mobile.*
- *Skype.*
- *Facebook.*
- *Twitter.*

You can delete an existing contact by selecting the contact row in the table and then clicking the 🗑 **Delete** button in the section header.

1.10 Addresses section

You can set the applicable addresses here.

You can add an address by clicking the ▯ **New** button in the section. The screen will display a pop-up window to enter the following:

- *Location* - the location code. You can enter the location code or select it from a list using the ▦ **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all codes configured in the system. You can find codes by using the Filter box at the top of the pop-up and entering some characters of the code or name. You can enter a code by clicking the entry in the table or cancel by closing the window. You can configure locations in the Locations screen.
- *Type* - a drop-down list indicating the address type. Values: Billing Address; Collection Address; Delivery Address; Headquarters.

You can save your changes with the **Save** button, or discard your changes with the **Close** button.

You can remove an address by selecting it from the table and clicking the 🗑 **Delete** button in the section header.

1.11 Parameters section

You can set parameters here to control additional functionality.

You can select a parameter to add using the provided Select Parameter drop-down list and clicking the ✚ **Add** button.

Once you have selected the parameter, the screen will display it in this section. Parameters are displayed in the sequence which your system administrators have configured them to be displayed. Once the parameter is added, you can enter the value - in general, the screen will validate the value or will provide a list of values to select, depending on the parameter settings.

You can remove a parameter by clicking the ⊘ **Cancel** button next to the parameter value.

The following parameters are currently available:

Label	Description	Long Description	Type	Values

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Label	Description	Long Description	Type	Values
EPOD WS Password	EPOD WS Password	EPOD WS Password	TextBox	String
EPOD WS Username	EPOD WS Username	EPOD WS Username	TextBox	String

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