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1 Category:Asset Management

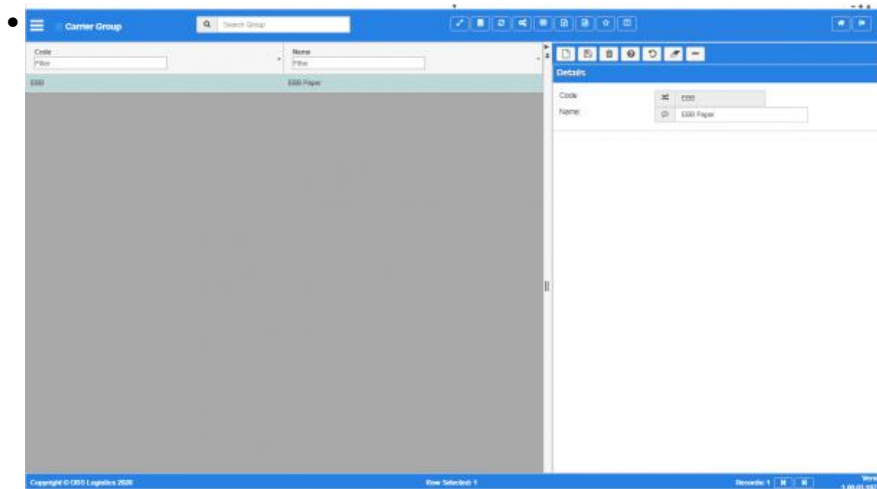


2 Category:Base Data



3 Carrier Group

This screen allows you to maintain the carrier groups in the system. These are used when you create carriers in the [Carriers](#) screen.



Carrier groups maintenance

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

- **Code** - the carrier group code.
- **Name** - the carrier group description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the carrier group code.
- **Name** - the carrier group description.



4 Carrier Parameters

This screen allows you to maintain the parameters available for a specific carrier.

Once created, you can assign these to a carrier using the [Carriers](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the parameter code, which must be unique.
- *Icon* - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- *Label* - the short label, displayed when selecting a parameter.
- *Description* - additional descriptive help.
- *Long Description* - additional descriptive help.
- *Group Code* - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- *Category Code* - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- *Required* - a check-box controlling whether the parameter is required entry.

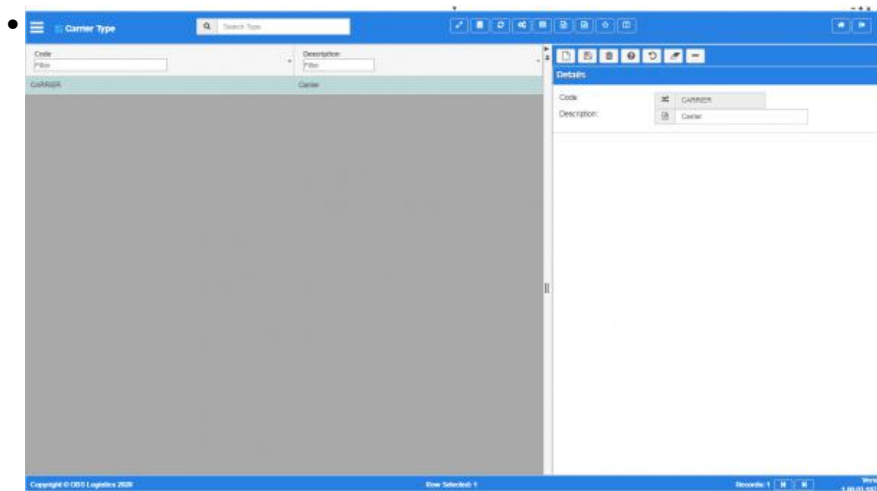


- *Sequence* - the sequence in which the parameter is displayed.
- *Multiple* - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- *Display* - a check box controlling whether the parameter is displayed to the user.
- *Display Type* - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- *ValueType* - the basic validation. Values are: String; Integer.
- *Values* - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- *Values Desc* - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- *Value Source* - if you want to source data from the database for drop-down lists, you can add the query here.



5 Carrier Type

This screen allows you to maintain the the carrier types. You can select the carrier type when creating carriers in the [Carriers](#) screen.



Carrier types maintenance

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

- *Code* - the carrier type code.
- *Description* - the carrier type description.
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

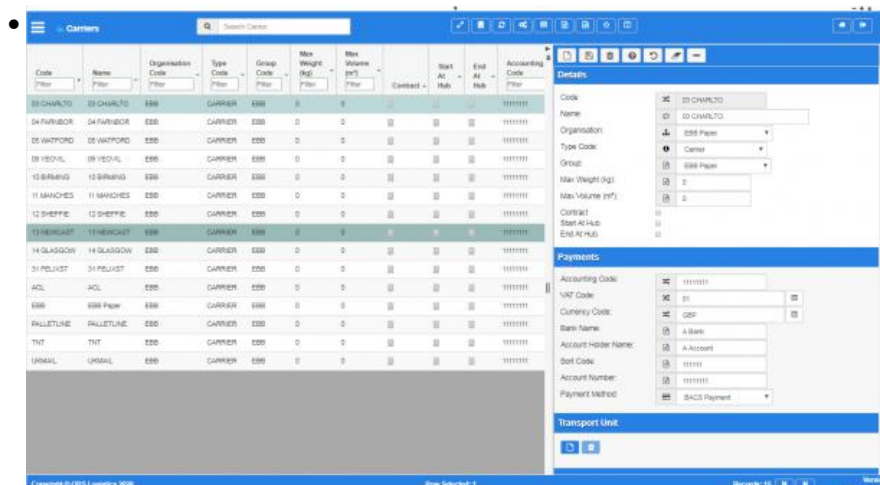
- *Code* - the carrier type code.
- *Description* - the carrier type description.



6 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:





-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

6.1 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.


6.2 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.

6.3 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.




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.


6.4 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.


6.5 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.


6.6 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.




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.


6.7 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.


6.8 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.

6.9 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:



- *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.

6.10 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.

6.11 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
-------	-------------	------------------	------	--------



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










7 Charges

This screen allows you to maintain the charges in the system.

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

- *Association* - the level to which the charge is associated.
- *Name* - the name of the charge.
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

- *Association* - the level to which the charge is associated.
- *Name* - the name of the charge.

7.1 Charge Item section

You can set the change items for each charge.


You can add charge items by clicking the  **New** button in the section.

You can edit an existing charge item by selecting the charge item 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:

- *Item*.
- *Name*.


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

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

7.2 Notes section

You can add notes through the Notes section.



You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.










8 Contract Type

This screen allows you to maintain the contract types in the system. These are used when you create contracts in the **Contracts** screen.

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

- *Code* - the contract type code.
- *Description* - the contract type description.
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

- *Code* - the contract type code.
- *Description* - the contract type description.










9 Contracts

This screen allows you to maintain the contracts in the system. Contracts are created between the **Organisation** and **Carriers** or **Customer** to control finance options.

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




- *Code.*
- *Name.*
- *Type Code* - the contract type, defining the type of counter party.
- *Local Party Code* - the organisation to whom the contract pertains.
- *Counter Party Code* - the carrier or customer to whom the contract pertains.
- *Currency Code.*
- *Effectivity Date From.*
- *Effectivity Date To.*
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:


9.1 Details section




- *Code* - the contract code.
- *Name* - the contract name.
- *Type Code* - the contract type, defining the type of counter party. You can maintain the values in the **Contract Type** screen.
- *Organisation* - a drop-down list of organisations to select the organisation to whom the contract pertains. You can maintain the values in the **Organisation** screen.
- *Counter Party Code* - the customer or carrier to whom the contract pertains. This will be labelled as "Customer Code" or "Carrier Code" depending on your selection of Type Code above. You can maintain the values in the **Customer** and **Carriers** screens respectively. You can enter the customer or carrier code, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of carriers or customers. You can select a code by clicking on the row or cancel entry by closing the window.
- *Currency Code* - a drop-down list of all currencies in the system. You can maintain the values in the **Currencies** screen.
- *Effectivity Date From* - the date from which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date to which the contract is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.




9.2 = Rate Cards section

You can set the rate card that is applied to this contract.

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


- *Rate Card Code* - the rate card code. You can enter the rate card code directly, or look up the code by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window of rate cards. You can select a code by clicking on the row or cancel entry by closing the window.
- *Effectivity Date From* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.
- *Effectivity Date To* - the date from which the rate card is effective. You can enter the date directly or use a  **Calendar** pop-up to select the date.

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

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

9.3 Notes section

You can add notes through the Notes section.

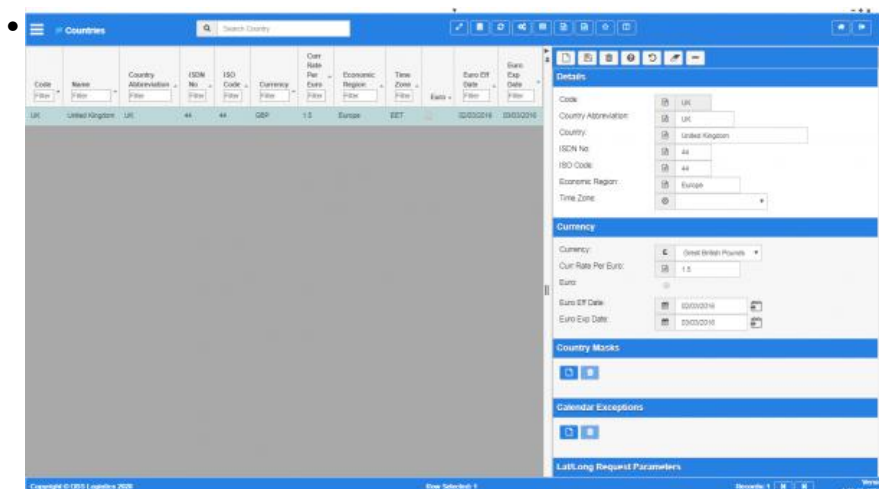
You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.



10 Countries

This screen allows you to maintain the the countries in the system. You can select the country when entering addresses in many parts of the system, but predominantly the [Locations](#) screen.



Countries maintenance

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

- **Code** - the country code.
- **Name** - the country name.
- **Country Abbreviation** - the abbreviation.
- **ISDN No.**
- **ISO Code.**
- **Currency** - the currency.
- **Curr Rate Per Euro.**
- **Economic Region.**
- **Time Zone.**
- **Euro.**
- **Euro Eff Date.**
- **Euro Exp Date.**
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:



10.1 Details section


- *Code* - the country code.
- *Name* - the country name.
- *Country Abbreviation* - the abbreviation.
- *ISDN No.*
- *ISO Code.*
- *Economic Region.*
- *Time Zone* - a drop-down list of all timezones that have been configured in the system. You can maintain timezones in the [Timezones](#) screen.


10.2 Currency section

- *Currency* - a drop-down list to select the currency. You can maintain the currencies available to the system in the [Currencies](#) screen.
- *Curr Rate Per Euro.*
- *Euro* - a check-box signifying that this country is in the Eurozone.
- *Euro Eff Date.*
- *Euro Exp Date.*

10.3 Area Code Formats section


You can use the Area Code Formats section to add a mask that helps identify the country from the postcode.


You can click the  **New** button in this section to add a new mask. The screen will pop-up an entry window where you can enter the new area code format. You can save this mask with the provided **Save** button, or discard your changes with the **Close** button.

You can delete an existing mask by selecting it from the table and clicking the provided  **Delete** button on the section header.

10.4 Calendar Exceptions section

You can add country non-working days using the Calendar Exceptions section.

You can click the  **New** button in this section to add a new exception. The screen will pop-up an entry window where you can enter the date. You can save this with the provided **Save** button, or discard your changes with the **Close** button.

You can delete an existing exception by selecting it from the table and clicking the provided  **Delete** button on the section header.

10.5 Lat/Long Request Parameters

You can control how this lat/long (geocode and reverse geocode) requests for addresses in this country are processed with the parameters in the Lat/Long Request Parameters section.

You can indicate through options whether a portion of the address is used (qualified or unqualified) or not for the following:


- Address Name.
- Address Lines.
- District (Address Line 3).
- Town.
- County.
- State (County).



- Postal Code.
- Country.

10.6 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

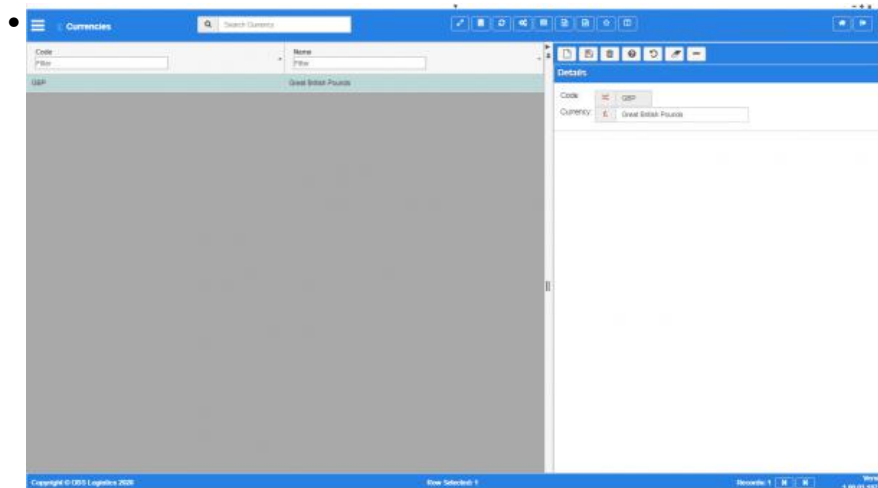
Any notes may be removed by clicking the **x** in the corner of the note.



11 Currencies

This screen allows you to maintain the currencies in the system. Currencies are used in many places, including:

- Countries.
- Supplier.
- Customer.
- Carriers.



Currencies maintenance

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

- *Code* - the currency code.
- *Name* - the currency.
- *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:

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

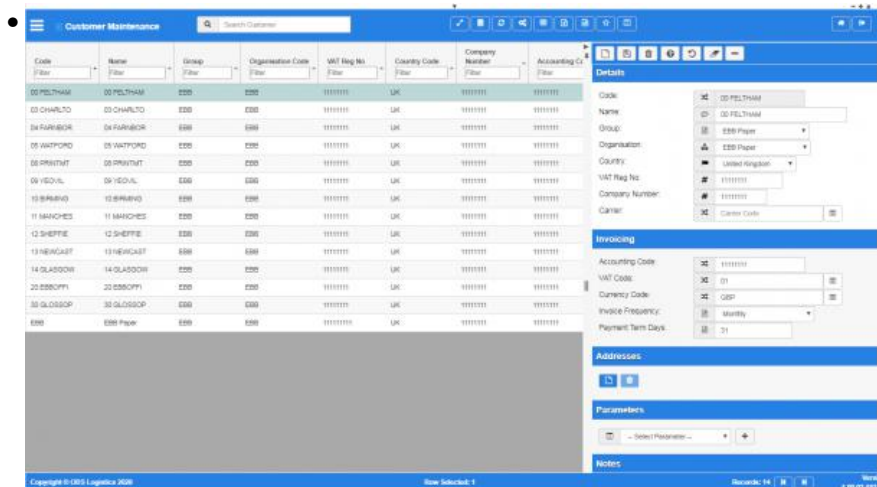
You can change or add the following information:

- *Code* - the currency code.
- *Name* - the currency.



12 Customer

This screen allows you to maintain the customers in the system.



Customers

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

- *Code.*
- *Name.*
- *Group.*
- *Organisation Code.*
- *VAT Reg No.*
- *Country Code.*
- *Company Number.*
- *Accounting Code.*
- *VAT Code.*
- *Currency Code.*
- *Invoice Frequency.*
- *Payment Term Days.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:



12.1 Details section


- *Code.*
- *Name.*
- *Group* - a drop-down list of customer groups configured in the system. You can configure customer groups in the [Customer Groups](#) screen.
- *Organisation Code* - a drop-down list of organisations configured in the system. You can configure organisations in the [Organisation](#) screen.
- *Country Code* - a drop-down list of countries configured in the system. You can configure countries in the [Countries](#) screen...
- *Company Number*
- *VAT Reg No.*
- *Carrier* - the carrier that is used by the customer. You can maintain these in the [Carriers](#) screen. You can look up the available carrier codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.


12.2 Invoicing section

- *Accounting Code.*
- *VAT Code* - the VAT code used by the customer. You can maintain these in the [VAT Codes](#) screen. You can look up the available carrier codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Currency Code* - the currency code used by the customer. You can maintain these in the [Currencies](#) screen. You can look up the available currency codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Invoice Frequency* - a drop-down list used to determine the invoice interval, Values: Weekly; Monthly; Yearly.
- *Payment Term Days.*

12.3 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.

12.4 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.



The available parameters are configurable in the [Customer Parameters](#) screen.

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
Consolidate with others	Allow Consolidate with other companies orders	Allow the consolidation of orders with orders placed by other companies	DropDownList	Yes,No
Fuel Base Price	Fuel Base Price	Fuel surcharge to be calculated and charged on variation of current price versus contract base price	TextBox	
Order Delivery Confirm Req	Order Delivery Confirmation Required	Order Delivery Confirmation Required	DropDownList	Yes,No
Order Received Confirm Req	Order Received Confirmation Required	Order Received Confirmation Required	DropDownList	Yes,No

12.5 Notes section


You can add notes through the Notes section.


You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

12.6 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:


- *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.

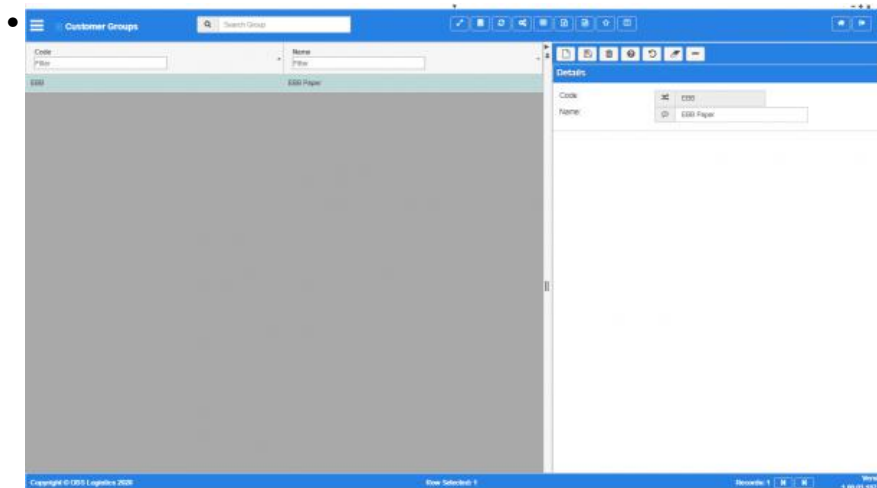


13 Customer Groups

This is the Customer Groups maintenance page. Customer Groups are used to link the customers together for easier filtering and configuration.

This page starts finding data - enter your query from your configured filter fields.

Results are displayed in a table and are automatically displayed if there are only a few details.






Customer groups maintenance

List of fields displayed:

- **Code** - Group Code.
- **Name** - Group display name.

Editing one of the records can be done by clicking on a row - the selected line data will be loaded into the details panel for editing.

Adding a new record can be done by opening the detail panel and clicking the  **New** button - all fields are required.

Use the  **Save** button to save the entered or edited details.  **Warning:** If you do not save your work, your changes will be lost



14 Customer Parameters

This screen allows you to maintain the parameters available for a specific customer.

Once created, you can assign these to a customer using the [Customer](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

The screenshot displays the 'Customer Parameters' application window. The main area contains a table with the following columns: Code, Icon, Label, Description, and Long Description. The table lists several parameters, including 'CONSOL_OTHERS_IND', 'FUEL_BASE_PRICE', 'ORD_DEL_CONF_REQD', and 'ORD_REC_CONF_REQD'. The 'Details' panel on the right is open for the 'CONSOL_OTHERS_IND' parameter, showing its configuration: Code (CONSOL_OTHERS_IND), Icon (to be selected), Label (Consolidate with others), Description (Allow Consolidate with other companies), Long Description (Allow the consolidation of orders with orders placed by other companies), Group (to be selected), Category Code (General Parameters), Required (checkbox), Sequence (1), Multiple (checkbox), Display (checkbox), Display Type (DropDownList), Value Type (String), Values (10), Values Desc (Yes/No), and Value Source (Value Source).

Organisation Screen

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.



- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

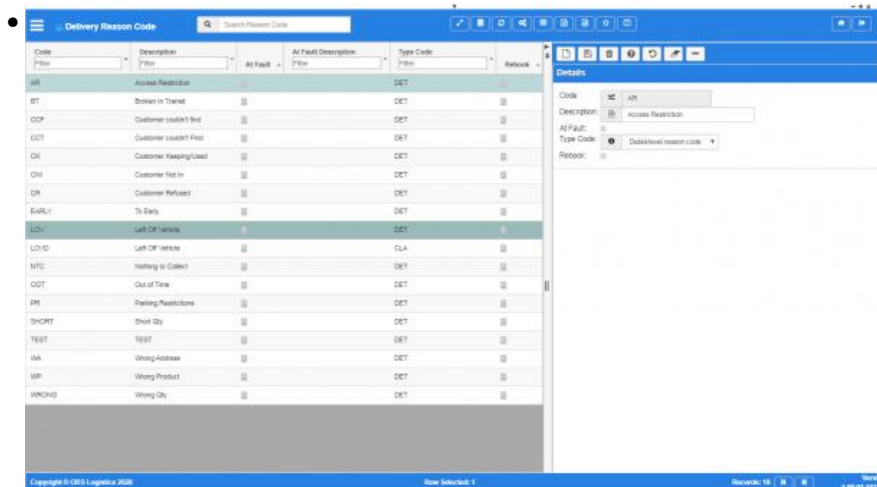
You can change or add the following:

- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



15 Delivery Reason Codes

This screen allows you to maintain the delivery reason codes available in the system. These are used in debrief.



Delivery reason codes

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

- **Code** - the group code.
- **Description** - the description.
- **At Fault** - whether the reason code identifies a fault.
- **At Fault Description** - the description of the fault identified.
- **Type Code** - the reason code type.
- **Rebook** - whether the reason code identified a reason that can be rebooked.
- **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:

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

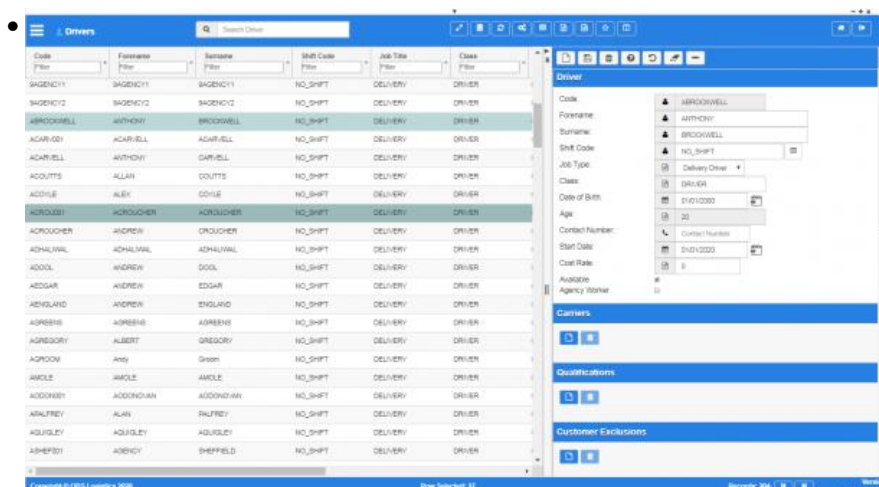
You can change or add the following:

- **Code** - the group ID.
- **Name** - The displayed name.
- **At Fault** - a check box indicating whether the reason code identifies a fault.
- **At Fault Description** - the description of the fault identified.
- **Type Code** - a drop-down list of reason types. You can maintain these in the [Reason Types](#) screen.
- **Rebook** - a check box indicating whether the reason code identified a reason that can be rebooked.



16 Drivers

This screen allows you to maintain the vehicles in the system. Vehicles are used to define the specific parameters of a vehicle. You resource trips with vehicles.



Drivers

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

- *Code.*
- *Forename.*
- *Surname.*
- *Shift Code.*
- *Job Title.*
- *Class.*
- *Date of Birth.*
- *Contact Number.*
- *Start Date.*
- *Available.*
- *Agency Worker.*
- *Carriers.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:






16.1 Driver Details section

- *Code* - the driver code.
- *Forename* - the driver's first name.
- *Surname* - the driver's last name.
- *Shift Code* - the driver's assigned shift. The screen validates this against the created shift codes in the system. You can look up the available shift codes using the  **Lookup** button to the right of the value entry. A pop-up window will be displayed listing the available values. You can select a value from the list, or cancel the look up by closing the window.
- *Job Title* - a drop-down list of all job titles configured in the system.
- *Class* - free-text.
- *Date of Birth* - the driver's date of birth. You can use the  **Calendar** button to select the date from a pop-up calendar.
- *Contact Number* - the driver's contact number.
- *Start Date* - the driver's start date. You can use the  **Calendar** button to select the date from a pop-up calendar.
- *Available* - a check box indicating that the driver is available for work.
- *Agency Worker* - a check box indicating that this driver is an agency worker.

16.2 Carriers section



You can assign the resource to any number of carriers.


You can assign the resource to a carrier by clicking the  **New** button in the section header. The screen will display a pop-up window to allow you to identify the carrier to which you want to assign the vehicle. You can enter a carrier code or click the  **Lookup** button to the right of the value entry to see a list of all carriers. You can select a carrier from this list to select it or close the window to cancel entry. Once you have selected or entered a carrier, you can save the resource to this carrier using the **Save** button. You can cancel adding the resource to the carrier by closing the window.

You can remove a resource from a carrier by selecting the carrier in the table and then clicking the  **Delete** button in the section header.

16.3 Qualifications section



You can assign qualifications to the driver. You can maintain the qualifications that may be assigned to a driver in the **Qualifications** screen.

You can assign a qualification to the driver by clicking the  **New** button in the section header. The screen will display a pop-up window to allow you to identify the qualification to which you want to assign the vehicle from a drop-down list. You must also enter a valid date range. You can use the  **Calendar** buttons to the right of the value entry to select the dates. Once you have selected a qualification and entered valid dates, you can save the driver's qualification using the **Save** button. You can cancel by closing the window.


You can remove a qualification from a driver by selecting the qualification in the table and then clicking the  **Delete** button in the section header.

16.4 Customer Exclusions

You can exclude the driver from being able to work for certain customers by adding the customers to the exclusion list. You can maintain the customers in the **Customer** screen.



You can exclude a customer by clicking the  **New** button in the section header. The screen will display a pop-up window to allow you to identify the customer from which you want to exclude the driver. You can enter a customer code or click the  **Lookup** button to the right of the value entry to see a list of all customers. You can select a customer from this list to select it or close the window to cancel entry. Once you have selected or entered a customer, you can save the excluded customer using the **Save** button. You can cancel excluding the customer by closing the window.




You can remove an excluded customer from a driver by selecting the customer in the table and then clicking the  **Delete** button in the section header.

16.5 Location Exclusions

You can exclude the driver from being able to at certain locations by adding the locations to the exclusion list. You can maintain the locations in the [Locations](#) screen.

You can exclude a location by clicking the  **New** button in the section header. The screen will display a pop-up window to allow you to identify the location from which you want to exclude the driver. You can enter a location code or click the  **Lookup** button to the right of the value entry to see a list of all locations. You can select a location from this list to select it or close the window to cancel entry. Once you have selected or entered a location, you can save the excluded location using the **Save** button. You can cancel excluding the location by closing the window.

You can remove an excluded location from a driver by selecting the location in the table and then clicking the  **Delete** button in the section header.

16.6 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.

The available parameters are configurable in the [User Parameters](#) screen.

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
EPOD Password	EPOD Password	EPOD Password	TextBox	String
EPOD Username	EPOD Username	EPOD Username	TextBox	String

16.7 Notes section


You can add notes through the Notes section.


You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

16.8 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:

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

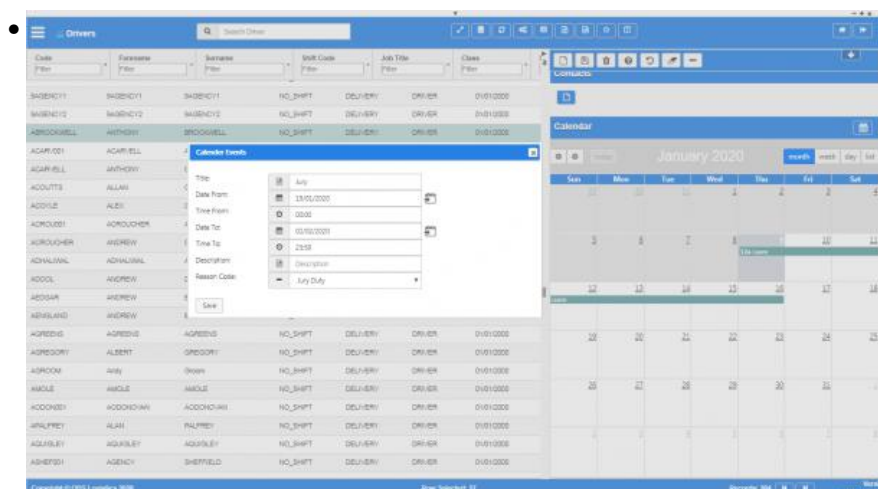
You can add additional contact media by selecting the media type from the drop-down list. The screen will add the medium to the Contact Mediums list above. Additional contact media:

- *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.

16.9 Calendar section

You can control availability through the Calendar section.



Driver availability calendar

Here, you can determine the period (hours, days, weeks) where this resource is unavailable.

The section shows a calendar. You can choose to display this in a month, week, day or list format, using the buttons in the title.

- In the month view, the whole month is shown. Events are displayed as the time hours plus an "a" for AM or "p" for PM, followed by the title underneath.
- in the week view, the whole week is shown with all hours in each day. Events are displayed as a block on the days and hours booked, showing the range of times followed by the title underneath.
- in the day view, the whole day is shown with all hours in the day. Events are displayed as a block on the hours booked, showing the range of times followed by the title underneath.
- In the list view, all events in a month are shown. Headers are added to the list for those days with events, showing the full date and day. An entry is shown for each day of the event, showing the time range and the title.



You can move between days, weeks or months using the left and right buttons in the calendar header.



If you click on a day in month view, you will be taken to that day in the day view.

If you drag to select a range of days, the screen will display a Calendar Events pop-up for you to enter the details. The dates from and to will be set to the selected dates, the times from set from midnight to midnight.

If you click on an hour in week or day view, the screen will display a Calendar Events pop-up for you to enter the details. The dates will be set to the selected date, the time from set to the selected time, and the time to set as midnight.

You cannot add events from the event list directly.

The Calendar Events pop-up allows you to enter the following:

- **Title** - the title of the event. The screen will display this in the calendar.
- **Date From** - the range of the event. This can be multiple days or hours. You can use the  **Calendar** look-up button to help selecting a date.
- **Time From**.
- **Date To** - you can use the  **Calendar** look-up button to help selecting a date.
- **Time To**.
- **Description** - the description.
- **Reason Code** - a drop-down list of all of the configured resource reason codes. You can configure these codes in the [Resource Reason Codes](#) screen.



The pop-up will default the dates and times as you selected them from the calendar initially (for a new event) or the details of the event selected. Although the values are pre-set, you can change them here.

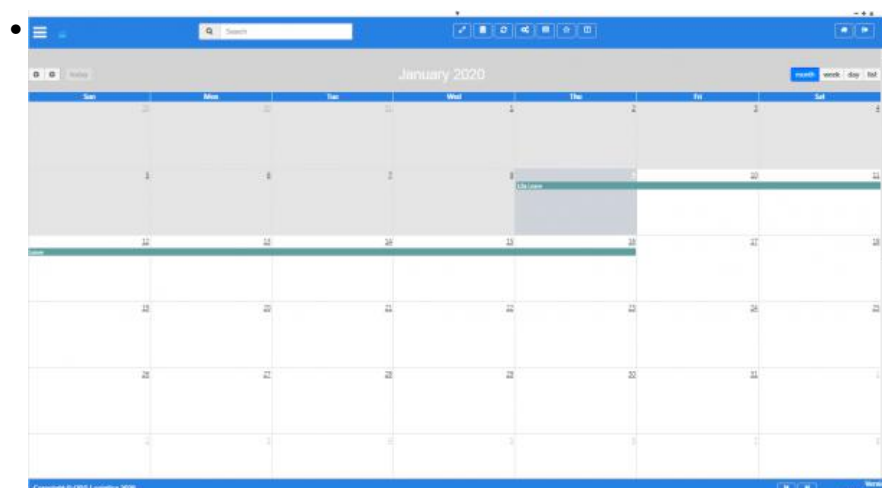
You can save a new event with the **Save** button.

You can update an existing event with the **Update** button, or delete the event with the **Delete** button.

You can enter or update the event by closing the window.

Once saved, the event will be displayed in the main calendar.

 **Note:** If you need more room to edit the calendar, you can click the  **Calendar** button in the title. The system will open a new tab in your browser with a full-screen calendar view. This full-screen view operates in the same way as the embedded calendar.



Full-screen calendar



17 Category: Finance Data



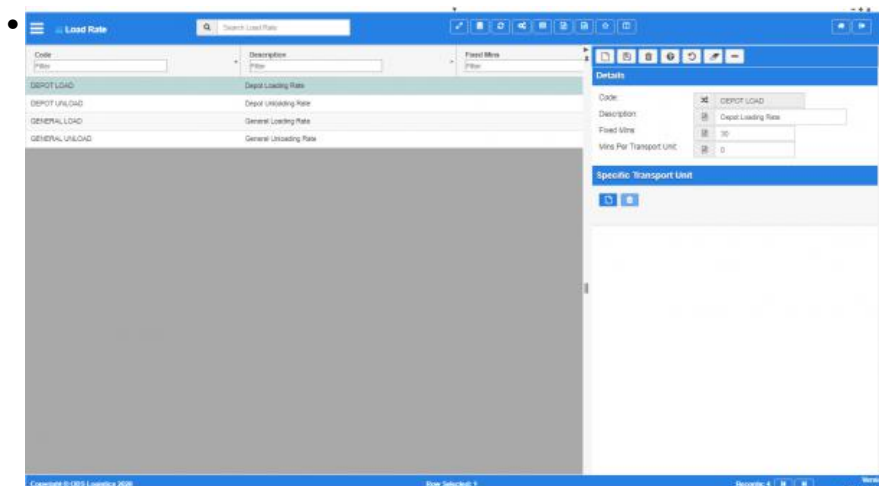
18 Category:Geographical Data



19 Load Rate

This screen allows you to maintain the time spent at each location when loading or unloading, and for the number of items that you are loading or unloading. This in turn defines the amount of time estimated at each location (or stop) you visit on a trip.

You can apply loading and unloading rates to locations using the [Locations](#) screen.



Load rates

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

- *Code* - the loading/unloading code.
- *Description* - the description.
- *Fixed Mins* - the fixed number of minutes at this location.
- *Mins Per Transport Unit* - the number of minutes per transport unit at this location.
- *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:


- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the loading/unloading code.
- *Description* - the description.
- *Fixed Mins* - the fixed number of minutes at this location.
- *Mins Per Transport Unit* - the number of minutes per transport unit at this location.



As an alternative or in addition to the global number of minutes to load or unload a single transport unit, you can enter a number of minutes per type of transport unit you have in the system. You can maintain transport units in the [Transport Units](#) screen.

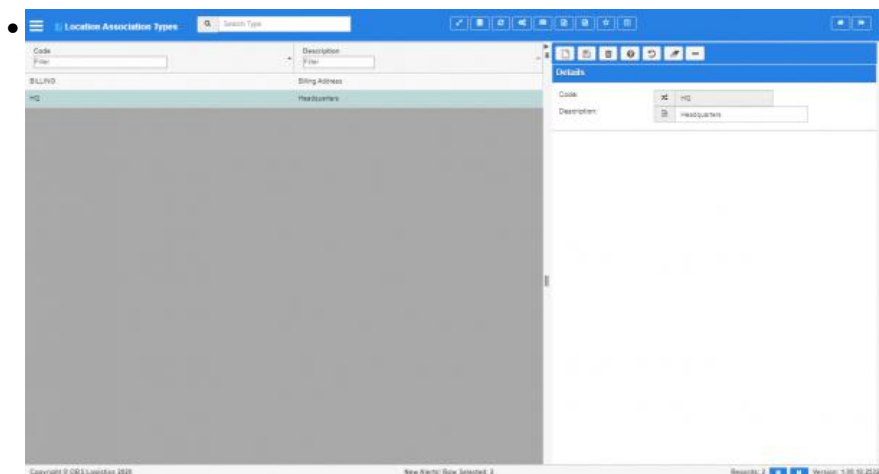
You can add a time taken for a specific transport unit using the  **New** button in the Specific Transport Unit section of the details panel. The screen will pop-up a window to select the transport unit from a drop-down list, and enter the number of minutes per unit.

You can delete an existing specific transport unit rate by clicking on the line and then clicking the  **Delete** button in the Specific Transport Unit section of the details panel.



20 Location Association Type

This screen allows you to maintain the the location association types, used when associating addresses to resources such as the carrier. For example, you can select the address type when creating addresses for the carriers in the [Carriers](#) screen, in the [Addresses](#) section.



Location association types maintenance

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

- **Code** - the address association type code.
- **Description** - the description.
- **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:

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

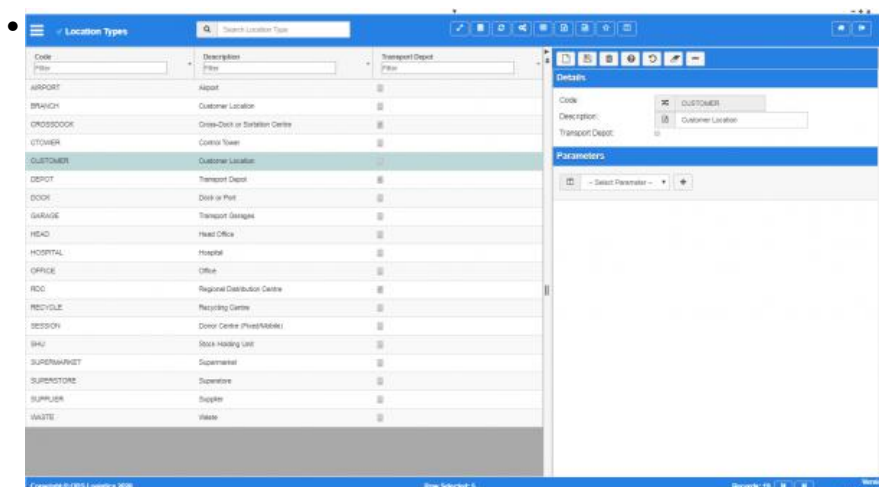
You can change or add the following:

- **Code** - the location association type code.
- **Description** - the description.



21 Location Types

This screen allows you to maintain the location types in the system. You can select the location type when creating locations in the [Locations](#) screen.



Location types

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

- **Code** - the location type code.
- **Description** - the location type description.
- **Transport Depot** - whether locations of this type are considered to be part of your transport network.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the location type code.
- **Description** - the location type description.
- **Transport Depot** - a check box controlling whether locations of this type are considered to be part of your transport network.



21.1 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:

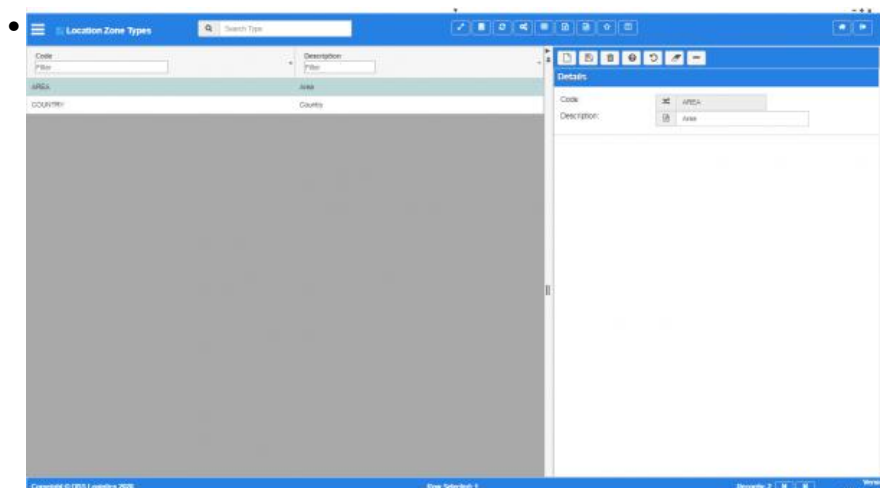
Label	Description	Long Description	Type	Values
Close Time	Close Time	Close Time	TextBox	Integer
Consol Job Load	Consol Job Load	Consol Job Load	DropDownList	Enabled, Disabled
Consol Job Unload	Consol Job Unload	Consol Job Unload	DropDownList	Enabled, Disabled
Job Group Load	Job Group Load	Job Group Load	TextBox	
Job Group Unload	Job Group Unload	Job Group Unload	TextBox	
Open Time	Open Time	Open Time	TextBox	Integer
Opening Pattern	Opening Pattern	A 7-character text string defining the open and closed days e.g. OOOOCC	TextBox	
Send Details Load	Send Details Load	Send Details Load	DropDownList	Enabled, Disabled
Send Details Unload	Send Details Unload	Send Details Unload	DropDownList	Enabled, Disabled
Send Job Load	Send Job Load	Send Job Load	DropDownList	Enabled, Disabled
Send Job Unload	Send Job Unload	Send Job Unload	DropDownList	Enabled, Disabled



22 Location Zone Types

This screen allows you to maintain the the location zone types used when creating location zones. You can select the location zone type when creating location zones in the [Location Zones](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Location zone types maintenance

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

- **Code** - the location zone type code.
- **Description** - the location zone type name.
- **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:

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

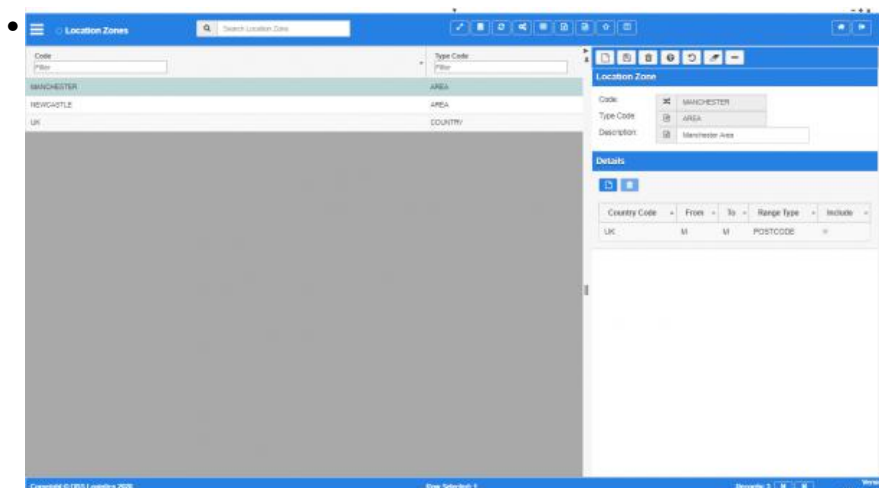
You can change or add the following:

- **Code** - the location zone type code.
- **Description** - the location zone type name.



23 Location Zones

This screen allows you to maintain the location zones in the system and the areas that this zone applies to. You can select the location zones when creating fixed route templates from the [Routes](#) screen, and also against the [Locations](#) screen, to identify which zone the location services.



Location zones

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

- **Code** - the location zone code.
- **Type Code** - the location zone type.
- **Description** - the description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the location zone code.
- **Type Code** - a drop-down list of all location zone types in the system. You can maintain location zone types in the [Location Zone Types](#) screen.
- **Description** - the description.


You can maintain the areas that this zone is made up of by using the Details section.



You use this section to identify ranges postcodes, postal zones or postal areas that are included or excluded from the zone.


A zone must have one included range.

A zone may also include or exclude other zones already created.

You can add new ranges by clicking the  **New** button on the Details section. The screen will display a pop-up window to enter the new range. You will be prompted for:

- *Type* - the type. Values: Postcode; Zone.
- *From* - the postcode, postal area, postal zone or location zone that forms the start of the range.
- *To* - the postcode, postal area, postal zone or location zone that forms the end of the range.
- *Country* - the country code.
- *Include* - a check box indicating whether you are including or excluding the range from the zone.

You can save you new range with the **Save** button, or discard your changes with the **Cancel** or **Close** button.

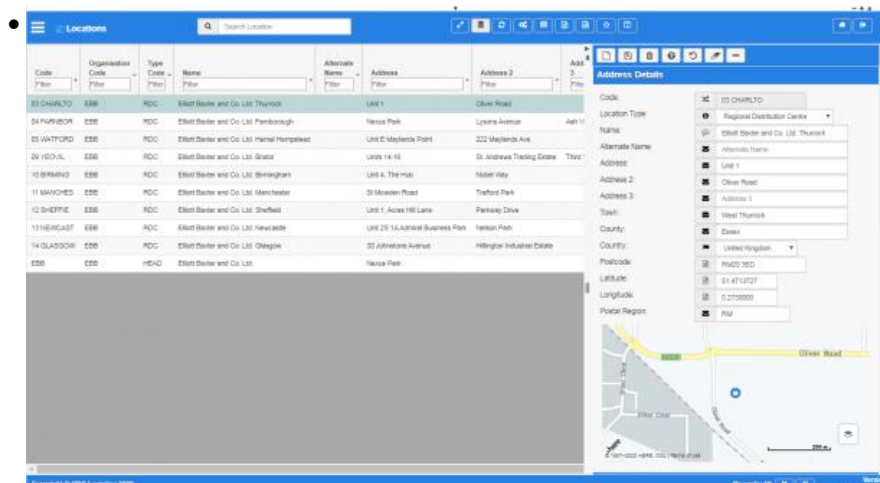
You can delete an existing range by selecting the range from the table and clicking the  **Delete** button in the Details section.



24 Locations

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

- Carriers
- Orders
- Trips
- Fixed Routes










Locations

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

- **Code** - the location code.
- **Organisation Code** - the organisation to which the location belongs.
- **Type Code** - the location type.
- **Name** - the name.
- **Alternate Name** - an alternate name.
- **Address**.
- **Address 2**.
- **Address 3**.
- **Town**.
- **County**.
- **Country Code**.
- **Postcode**.
- **Postal Region** - a postal region for the address.
- **Latitude** - the GPS position of the address.
- **Longitude** - the GPS position of the address.
- **Loading Rate Code** - the loading rate code.
- **Unloading Rate Code** - the unloading rate code.
- **Default Collection Depot** - the location that would commonly collect from this location.
- **Default Delivery Depot** - the location that would commonly deliver to this location.
- **Zone Code** - the location zone.
- **Time Zone Code** - the timezone.
- **Link Location** - any location considered to be in the same location as this location.
- **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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

24.1 Address Details section

- *Code* - the location code.
- *Type Code* - a drop-down list of all the location types in the system. You can configure location types in the [Location Types](#) screen.
- *Name* - the name.
- *Alternate Name* - an alternate name.
- *Address*.
- *Address 2*.
- *Address 3*.
- *Town*.
- *County*.
- *Country Code* - a drop-down list of all countries configured in the system. You can configure countries in the [Countries](#) screen.
- *Postcode*.
- *Latitude* - the GPS position of the address.
- *Longitude* - the GPS position of the address.
- *Postal Region* - a postal region for the address.

A map will be displayed showing the location.

24.2 Delivery section

- *Loading Rate Code* - a drop-down list of loading rates in the system. You can configure loading and unloading rates in the [Load Rate](#) screen.
- *Unloading Rate Code* - a drop-down list of unloading rates in the system. You can configure loading and unloading rates in the [Load Rate](#) screen.
- *Default Collection Depot* - the location that would commonly collect from this location.
- *Default Delivery Depot* - the location that would commonly deliver to this location.
- *Zone Code* - a drop-down list of all location zones in the system. You can configure location zones in the [Location Zones](#) screen. If you do not enter a zone, the system will determine the correct zone when the location is saved.
- *Time Zone Code* - a drop-down list of all the timezones in the system. You can configure timezones in the [Timezones](#) screen.
- *Link Location* - any location considered to be in the same location as this location.

24.3 Special Requirements section

Here you can indicate any special location requirements that have been configured for locations in the system. You can configure Location Requirements in the [Requirements](#) screen.

The following are currently available:

- Add Drop.
- Air Freight.



You can enable a special requirement by clicking it, and disable it by un-clicking it.

24.4 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
Close Time	Close Time	Close Time	TextBox	Integer
Consol Job Load	Consol Job Load	Consol Job Load	DropDownList	Enabled, Disabled
Consol Job Unload	Consol Job Unload	Consol Job Unload	DropDownList	Enabled, Disabled
Job Group Load	Job Group Load	Job Group Load	TextBox	
Job Group Unload	Job Group Unload	Job Group Unload	TextBox	
Open Time	Open Time	Open Time	TextBox	Integer
Opening Pattern	Opening Pattern	A 7-character text string defining the open and closed days e.g. OOOOCC	TextBox	
Send Details Load	Send Details Load	Send Details Load	DropDownList	Enabled, Disabled
Send Details Unload	Send Details Unload	Send Details Unload	DropDownList	Enabled, Disabled
Send Job Load	Send Job Load	Send Job Load	DropDownList	Enabled, Disabled
Send Job Unload	Send Job Unload	Send Job Unload	DropDownList	Enabled, Disabled

24.5 Opening/Closing Times section

You can set opening and closing times at this location for each day of the week.

To edit or add new times, click the **Edit** button on the section header. The screen will display a pop-up window to enter opening and closing times for each day of the week.


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

24.6 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.

24.7 Vehicle section

You can set whether certain vehicles are allowed or not allowed at this location.


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


- *Vehicle* - a drop-down list of the vehicles configured in the system. You can configure vehicles in the [Vehicles](#) screen.
- *Allowed* - a check box controlling whether the vehicle is explicitly allowed at this location.
- *Not-Allowed* - a check box controlling whether the vehicle is explicitly not allowed at this location.
- *Warning* - a check box controlling whether the user is warned if this vehicle is selected to visit this location.

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


24.8 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.


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.

24.9 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:

- *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.

24.10 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

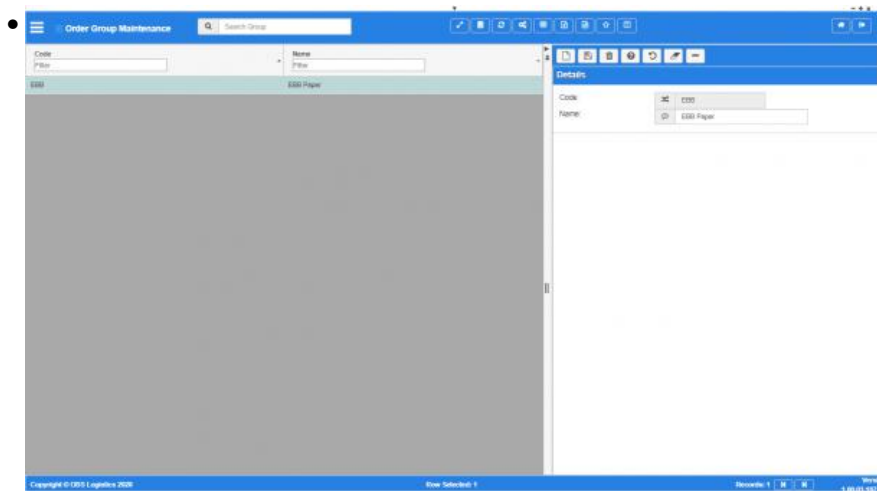


25 Category:Order Data



26 Order Group

This screen allows you to maintain the order groups used when creating orders. You can select the order group when creating orders in the [Orders](#) screen.



Order groups maintenance

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

- *Code* - the order group code.
- *Name* - the order group name.
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the order group code.
- *Name* - the order group name.

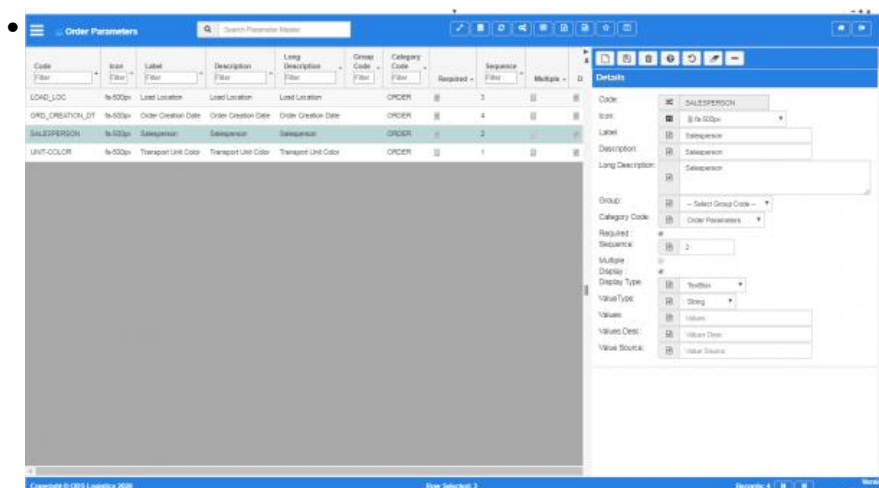


27 Order Parameters

This screen allows you to maintain the parameters available for a specific order.

Once created, you can assign these to an order using the [Orders](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Order parameters maintenance

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *Value Type.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.



- **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:

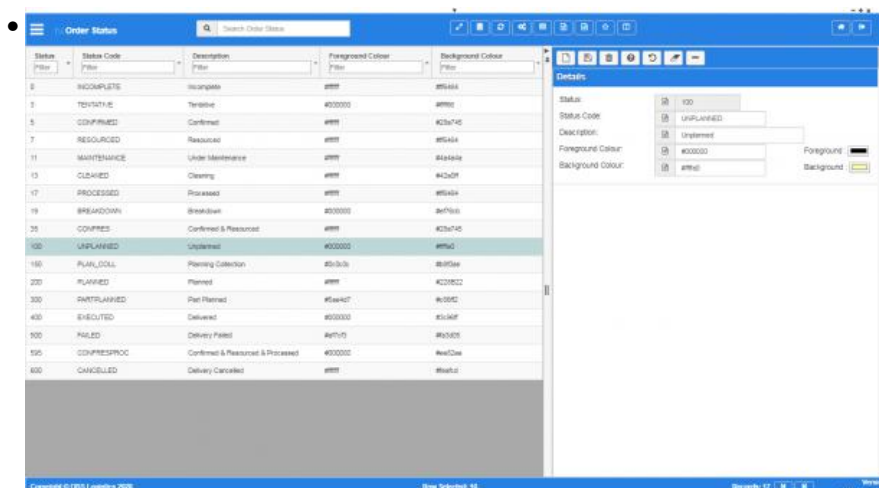
- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



28 Order Status

This screen allows you to maintain the order statuses used by the system for the order life-cycle.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Order status maintenance

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

- **Status** - the order status ID.
- **Status Code** - the order status code.
- **Description** - the description of the order status.
- **Foreground Colour** - the foreground colour used when displaying orders at this status.
- **Background Colour** - the background colour used when displaying orders at this status.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Status** - the order status ID.
- **Status Code** - the order status code.
- **Description** - the description of the order status.
- **Foreground Colour** - the foreground colour used when displaying orders at this status. You can enter this in HEX notation directly or use the provided colour picker button to select the colour.



- *Background Colour* - the background colour used when displaying orders at this status. You can enter this in HEX notation directly or use the provided colour picker button to select the colour.

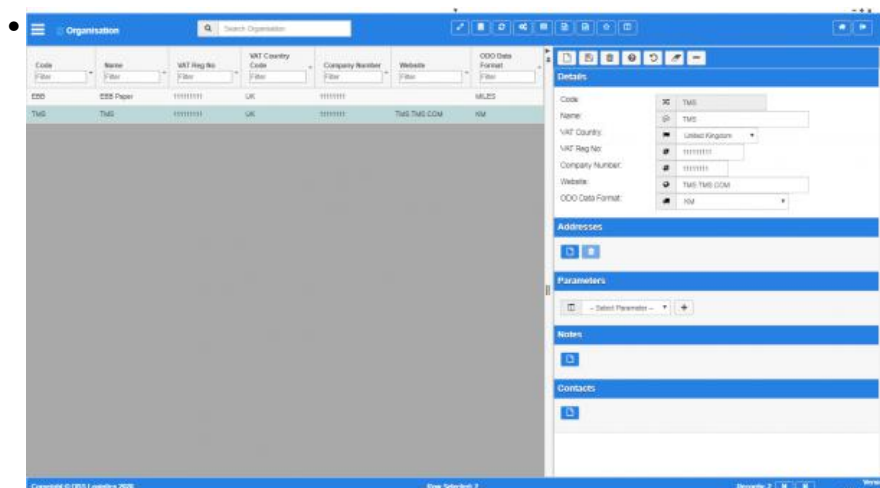


29 Organisation

This is the Organisation maintenance page. This is where the organisation or company is configured.

This page starts finding data - enter your query from your configured filter fields.

Results are displayed in a table and are automatically displayed if there are only a few details.



Organisation Screen

List of fields displayed:

- **Code** - the company code.
- **Name** - The display name of the company.
- **VAT Reg No** - registered VAT number.
- **VAT Country Code**.
- **Company Number** - the registered company number.
- **Website** - the company's website address.
- **Data Format** - ODO format, Kilometres (KM) or Miles.

Editing one of the records can be done by clicking on a row - the selected line data will be loaded into the details panel for editing.

Adding a new record can be done by opening the detail panel and clicking the  **New** button - all fields are required.

Use the **Save** button to save the entered or edited details.  **Warning:** If you do not save your work, your changes will be lost

When an organisation is edited after creation, more organisation data can be entered in the following sections.

29.1 Address Details section

- **Code** - the location code.
- **Type Code** - a drop-down list of all the location types in the system. You can configure location types in the [Location Types](#) screen.
- **Name** - the name.
- **Alternate Name** - an alternate name.
- **Address**.



- *Address 2.*
- *Address 3.*
- *Town.*
- *County.*
- *Country Code* - a drop-down list of all countries configured in the system. You can configure countries in the [Countries](#) screen.
- *Postcode.*
- *Latitude* - the GPS position of the address.
- *Longitude* - the GPS position of the address.
- *Postal Region* - a postal region for the address.

A map will be displayed showing the location.

29.2 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.

The available parameters are configurable in the [Organisation Parameters](#) screen.

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
Asset Debrief	Epod Asset Debrief	Are permanent assets being tracked? If so, need to update the assets	DropDownList	Yes, No
Auto-plan Service Level	Auto-plan Service Level	Auto-plan Service Level	DropDownList	Yes, No
Auto-plan Time Ahead (hours)	Auto-plan Time Ahead (hours)	Auto-plan Time Ahead (hours)	DropDownList	Yes, No
Calendar Working Day	Defines which days of the week are being worked	Defines which days of the week are being worked in the organisation	DropDownList	Yes, No
IF Reprocess	Interface Reprocess	Interface Reprocess	TextBox	String
IF Sleep Time	Interface Sleep Time	Interface Sleep Time	TextBox	Integer
IF MSA Database	Interface MSA Database	Interface MSA Database	TextBox	String
Enroute Collections	Epod Enroute Collections	Controls updating the trip to EN_ROUTE if not already, when debriefing collections (i.e. loading at depot)	DropDownList	Yes, No
Epod WS Password	Epod WS Password	EPOD Web Service Login Password	TextBox	String
Epod WS Username	Epod WS Username	EPOD Web Service Login Username	TextBox	String

29.3 Notes section

You can add notes through the Notes section.


You can click the **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.


Any notes may be removed by clicking the **x** in the corner of the note.



29.4 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:

- *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.



30 Category: Organisation Data

This section covers data related to the Organisation or Company



Once created, you can assign these to an organisation using the [Organisation](#) screen.

Organisation Parameters

Code	Nick	Label	Description	Long Description
Filter	Filter	Filter	Filter	Filter
ASSET_DESCRIPTOR	Is-SDQn	Asset Descriptor	Epod Asset Descriptor	Are permanent assets being tracked? If so, need to update the assets
EPOC_SHROUTE_COLLECT	Is-SDQn	Shuttle Collections	Epod Shuttle Collections	Controls updating the trip to EPL ROUTE if not already when despatching collection
EPOC_VMS_PASSWORD	Is-SDQn	Epod VMS Password	Epod VMS Password	EPOC VMS Service Login Password
EPOC_VMS_USERNAME	Is-SDQn	Epod VMS Username	Epod VMS Username	EPOC Web Service Login Username

Details

Code: EPOC_SHROUTE_COLLECT

Nick: Is-SDQn

Label: Shuttle Collections

Description: Epod Shuttle Collections

Long Description: Controls updating the trip to EPL ROUTE if not already when despatching collections (i.e. loading at depot)

Onmap: Select Group Code

Category Code:

Required: 1

Multiple:

Display:

Display Type: DropDownList

ValueType: String

Values: 1, 2

Values Desc: Yes, No

Value Source: Value Source

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

- The following actions are available on the Details panel:

- 60

- **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:

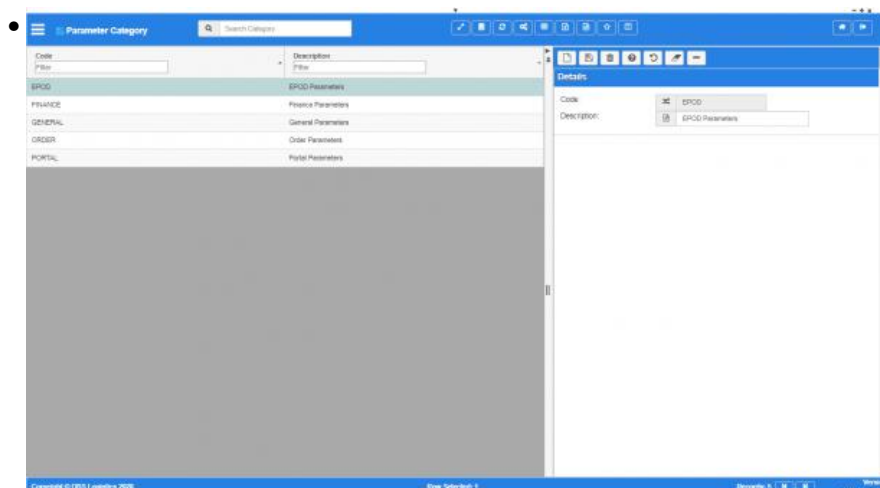
- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



32 Parameter Category

This screen allows you to maintain the parameter categories available in the system. You can then assign them to parameters.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Parameter categories maintenance

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

- **Code** - the category code.
- **Description** - the description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the category ID.
- **Name** - The displayed name.



33 Category:Parameter Data

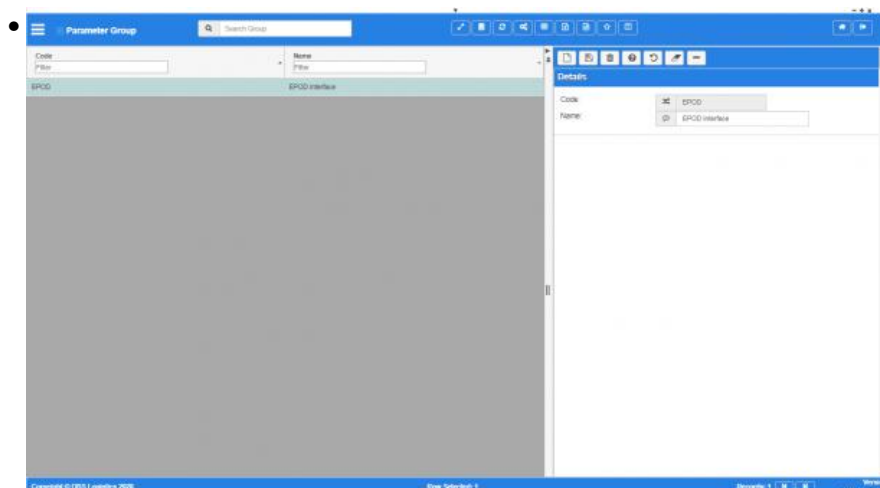
This section contains all Parameter Data Maintenance screens. There is also a template of general parameter maintenance screens.



34 Parameter Group

This screen allows you to maintain the parameter groups available in the system. You can then assign them to parameters.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Parameter groups maintenance

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

- **Code** - the group code.
- **Description** - the description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the group ID.
- **Name** - The displayed name.










35 Payment Method

This screen allows you to maintain the payment methods in the system. These are used when you create carriers in the **Carriers** screen.

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

- *Code* - the payment method code.
- *Description* - the payment method description.
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

- *Code* - the payment method code.
- *Description* - the payment method description.

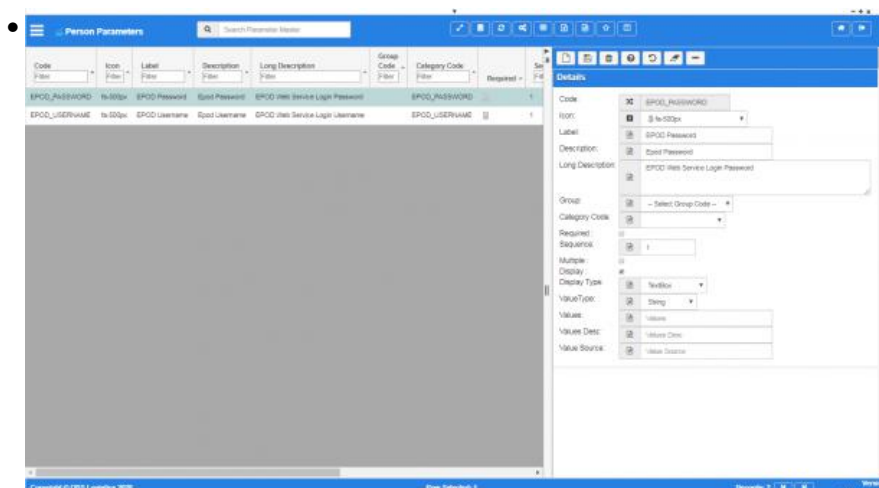


36 Person Parameters

This screen allows you to maintain the parameters available for drivers.

Once created, you can assign these to a driver using the [Drivers](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Person parameters maintenance

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *Value Type.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.



- **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:

- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.

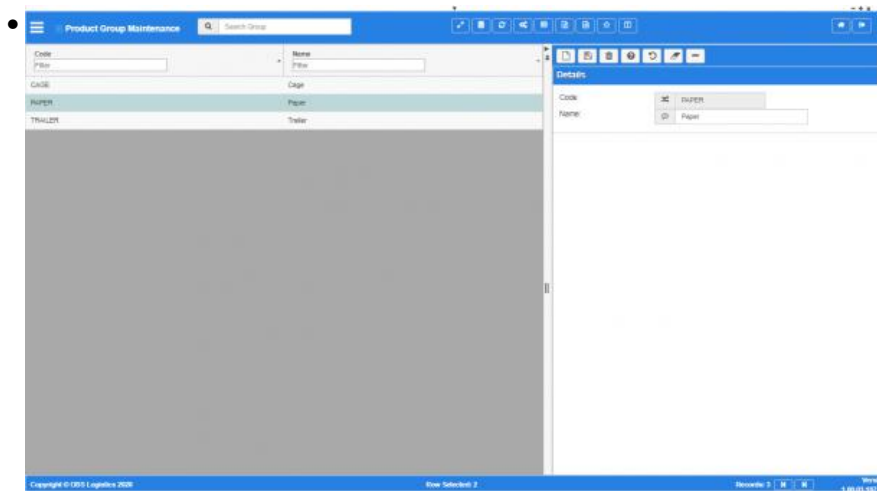


37 Category:Product Data



38 Product Group

This screen allows you to maintain the the product groups used when creating order lines. You can select the product groups created when creating order lines in the [Orders](#) screen.



Product groups maintenance

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

- **Code** - the product group code.
- **Name** - the product group name.
- **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:

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

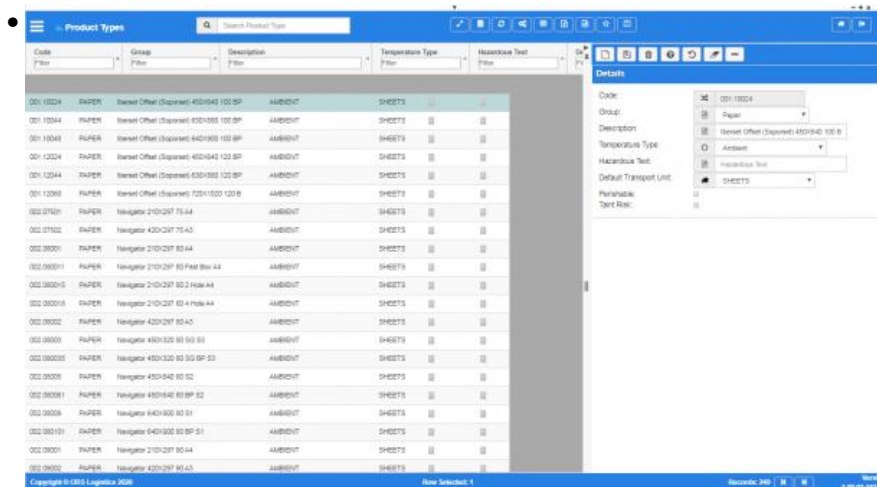
You can change or add the following:

- **Code** - the product group code.
- **Name** - the product group name.



39 Product Types

This screen allows you to maintain the product types in the system. You apply these to order lines and items when you create them in the [Orders](#) screen.



Product types

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

- **Code.**
- **Group.**
- **Description.**
- **Description 2.**
- **Temperature Type.**
- **Hazardous Text.**
- **Default Transport Unit.**
- **Perishable.**
- **Taint Risk.**
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the product type.
- **Group** - a drop-down list of all product groups configured in the system. You can configure product groups in the [Product Group](#) screen.
- **Description** - the product type description.

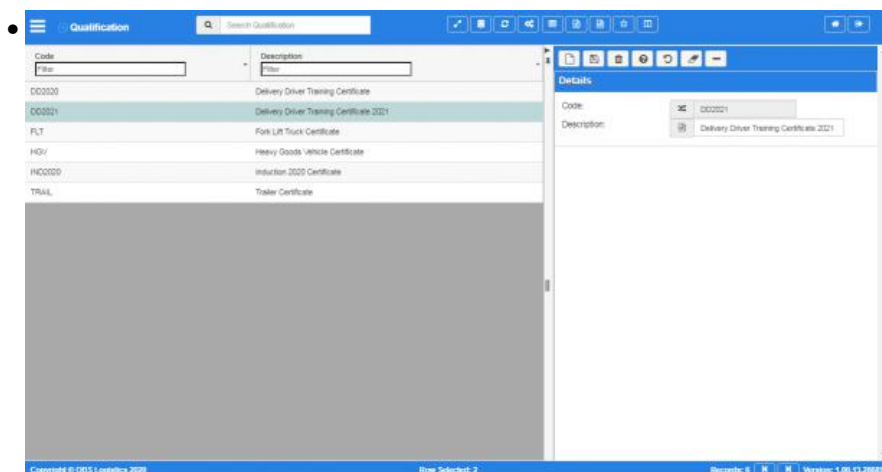


- *Description 2* - an additional product type description.
- *Temperature Type* - a drop-down list of all temperature types configured in the system. You can configure temperature types in the **Temperature Type** screen.
- *Hazardous Text* - general hazardous text.
- *Default Transport Unit* - a drop-down list of all transport units configured in the system. You can configure transport units in the **Transport Units** screen.
- *Perishable* - a check box indicating whether the product is perishable.
- *Taint Risk* - a check box indicating whether the product is a taint risk.



40 Qualifications

This screen allows you to maintain driver qualifications in the system. You can assign these to drivers in the [Drivers](#) screen.



Qualifications screen

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

- **Code.**
- **Description.**

The following actions are available on the Details panel:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the qualification code.
- **Description** - the description of the qualification.










41 Rate Cards

This screen allows you to maintain the charges in the system.





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

- *Code.*
- *Name.*
- *Service Code.*
- *Range Type.*
- *Range From.*
- *Range To.*
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:


- *Code.*
- *Name.*
- *Service Code.*
- *Range Type* - a drop-down list of range types. You can choose from:None (the default); Zone; Postcode.
- *Range From* - the screen only prompts for this field if you have select a range type which is not "None". Depending on the selection, the screen will prompt you to enter one of the following:
 - ♦ *Zone From* - the zone from. You can maintain these in the [Location Zones](#) screen. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
 - ♦ *Postcode From* - the postcode from. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
- *Range To* - the screen only prompts for this field if you have select a range type which is not "None". Depending on the selection, the screen will prompt you to enter one of the following:
 - ♦ *Zone To* - the zone to. You can maintain these in the [Location Zones](#) screen. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.
 - ♦ *Postcode To* - the postcode to. You can look up the available codes using the  **Lookup** button to the right of the value entry. The screen will display a pop-up window listing the available values. You can filter the values on the list by typing in the provided filter box and clicking the Filter button. You can select a value from the list, or cancel the look up by closing the window.




41.1 Breaks section

You can set the breaks for each charge.


You can add breaks by clicking the  **New** button in the section.

You can edit an existing break by selecting the break 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:

- *Code*.
- *Name*.
- *Item* - the rate item. You can enter the code or use the  **Lookup** button to the right of the value entry. The screen will display a pop-up window displaying all configured charge items in the system. You can select an item and click the **Save** button, or discard by closing the window.
- *Unit From* - the range of the break.
- *Unit To* - the range of the break.

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

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


You can add charges to a break using the **+ Add** button on the section header.

You can edit an existing break charge by selecting the break charge 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:


- *Code*.
- *Rate*.
- *Rate Basis* - Values: Per Unit; Per Item; Fixed Charge.
- *Minimum Charge*.
- *Maximum Charge*.

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

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

41.2 Notes section

You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

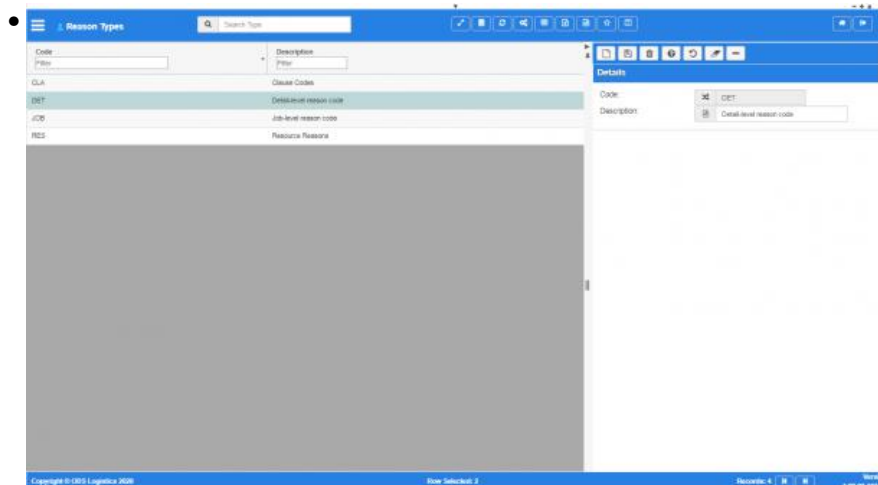
Any notes may be removed by clicking the **x** in the corner of the note.



42 Reason Types

This screen allows you to maintain the reason types available in the system. You can use these when creating or editing reason codes here:

- **Delivery Reason Codes.**
- **Resource Reason Codes.**



Reason types

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

- *Code* - the reason type code.
- *Description* - the description.
- *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:

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

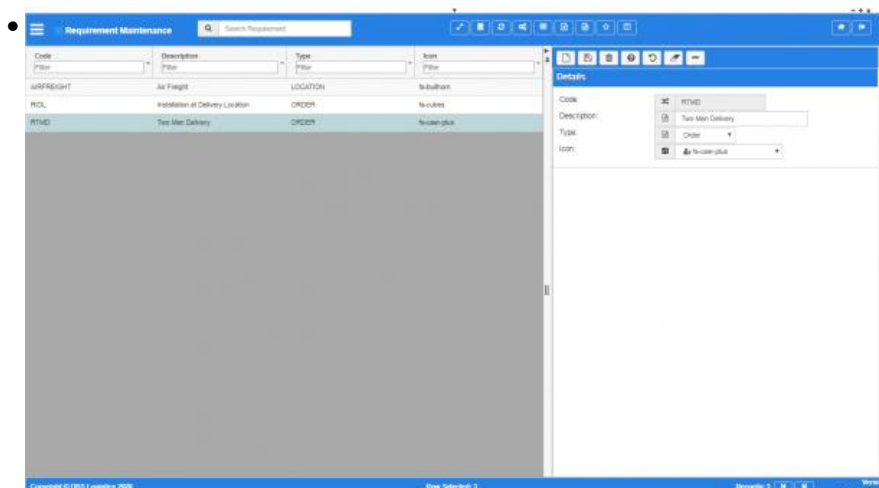
You can change or add the following:

- *Code* - the reason type ID.
- *Name* - The displayed name.



43 Requirements

This screen allows you to maintain the requirements used by the system for orders and locations. You can select the requirements when entering or amending an order in the [Orders](#) screen, or entering or amending locations in the [Locations](#) screen.



Requirements maintenance

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

- **Code** - the requirements code.
- **Description** - the requirement description.
- **Type** - the type of requirement.
- **Icon** - the icon displayed.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the requirements code.
- **Description** - the requirement description.
- **Type** - a drop-down list identifying the type of requirement. Values: Location; Order.
- **Icon** - a drop-down list of the icon displayed.



44 Category:Resource Data

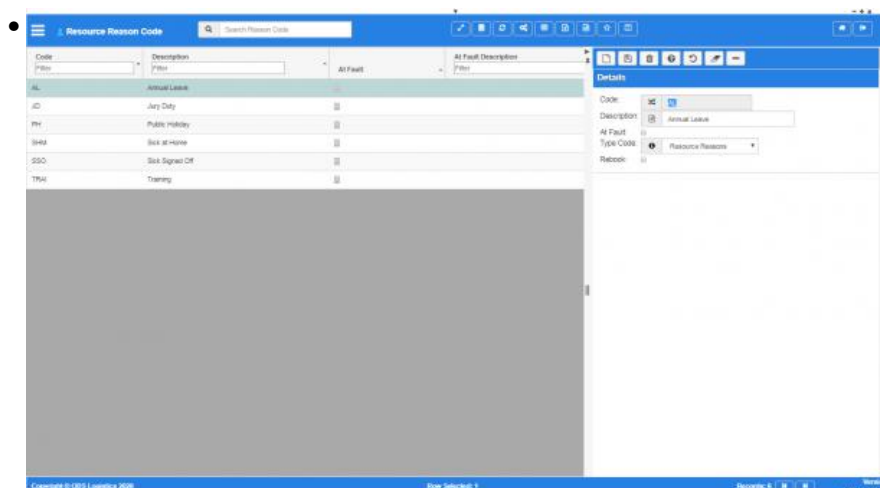
All resource-related configurable data in the system.



45 Resource Reason Codes

This screen allows you to maintain the resource reason codes available in the system. These are used when identifying resource unavailability in the resource diaries. See the following screens:

- [Drivers](#)
- [Vehicles](#)



Resource reasons

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

- **Code** - the group code.
- **Description** - the description.
- **At Fault** - whether the reason code identifies a fault.
- **At Fault Description** - the description of the fault identified.
- **Type Code** - the reason code type.
- **Rebook** - whether the reason code identified a reason that can be rebooked.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the group ID.
- **Name** - The displayed name.
- **At Fault** - a check box indicating whether the reason code identifies a fault.

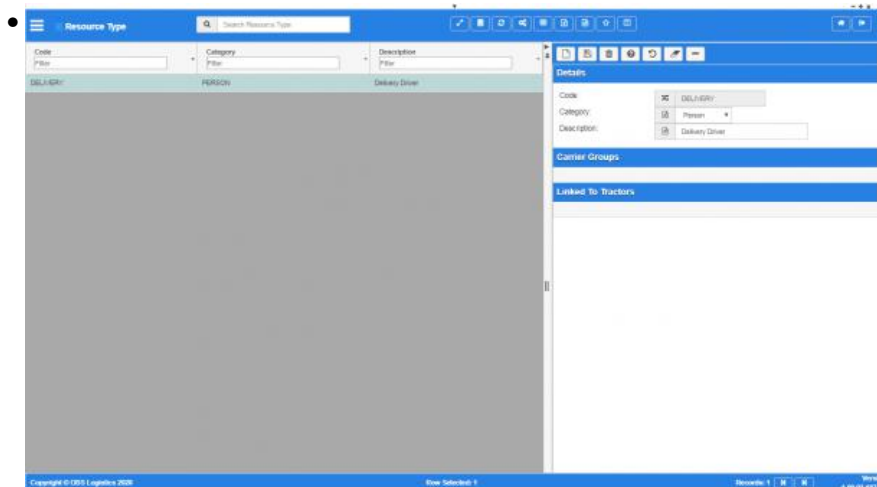


- *At Fault Description* - the description of the fault identified.
- *Type Code* - a drop-down list of reason types. You can maintain these in the [Reason Types](#) screen.
- *Rebook* - a check box indicating whether the reason code identified a reason that can be rebooked.



46 Resource Type

This screen allows you to maintain the resource types in the system.



Resource types maintenance

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

- **Code** - the resource type code.
- **Category** - the resource type category.
- **Description** - the resource type description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the resource type code.
- **Category** - a drop-down list of resource type categories. Values: Vehicle; Person.
- **Description** - the resource type description.



47 Resource Type Parameters

This screen allows you to maintain the parameters available for a specific resource type.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the parameter code, which must be unique.
- *Icon* - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- *Label* - the short label, displayed when selecting a parameter.
- *Description* - additional descriptive help.
- *Long Description* - additional descriptive help.
- *Group Code* - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- *Category Code* - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- *Required* - a check-box controlling whether the parameter is required entry.
- *Sequence* - the sequence in which the parameter is displayed.



- *Multiple* - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- *Display* - a check box controlling whether the parameter is displayed to the user.
- *Display Type* - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- *ValueType* - the basic validation. Values are: String; Integer.
- *Values* - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- *Values Desc* - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- *Value Source* - if you want to source data from the database for drop-down lists, you can add the query here.



48 Role Parameters

This screen allows you to maintain the parameters available for a user role.

Once created, you can assign these to a role using the [Roles](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

The screenshot shows the 'Role Parameters' maintenance interface. The left pane displays a table of parameters:

Code	Icon	Label	Description	Long Description
ACC_CUSTOMER		Customer	Accessible Customer	Accessible Customer
ACC_CUSTOMER_GROUP		Customer Group	Accessible Customer Group	Accessible Customer Group
ACC_DELIVER_LOCATION		Deliver Location	Accessible Deliver Location	Accessible Deliver Location
ACC_DEPOT		Accessible Depot	Accessible Depot	Accessible Depot for user organisation
ACC_ORDER_AMEND_IND		Allow Order Amend	Allow Order Create and Amend Indicator	Allow this user to Create and Amend Orders
ACC_ORDER_GROUP		Order Group	Accessible Order Group	Accessible Order Group
ACC_ORGANISATION		Organisation	Accessible Organisation	Accessible Organisation
AUTO_CREATE_TRIP		Auto Create Trip	Automatically Create a Trip	Automatically create a trip when a load is created
CURRENT_LOCATION		Current Location	Current Location	Current Location
MERGE_STOP_TIME		Merge Stop Time	The Time Between Merged Stops	The maximum time allowed between stops that will merge

The right pane shows the 'Details' for the 'ACC_CUSTOMER' parameter:

- Code: ACC_CUSTOMER
- Icon: [Icon]
- Label: Customer
- Description: Accessible Customer
- Long Description: Accessible Customer
- Group: [Group]
- Category Code: [Category Code]
- Required: [Required]
- Sequence: [Sequence]
- Multiple: [Multiple]
- Display: [Display]
- Display Type: [Display Type]
- Value Type: [Value Type]
- Values: [Values]
- Values Desc: [Values Desc]
- Value Source: [Value Source]

Role parameters maintenance

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

- **Code.**
- **Icon.**
- **Label.**
- **Description.**
- **Long Description.**
- **Group Code.**
- **Category Code.**
- **Required.**
- **Sequence.**
- **Multiple.**
- **Display.**
- **Display Type.**
- **Value Type.**
- **Values.**
- **Values Desc.**
- **Value Source.**
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.



- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

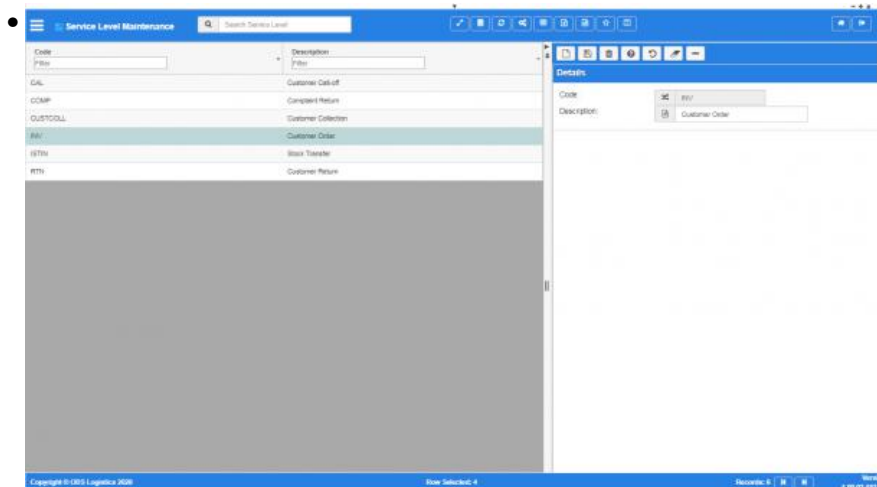
You can change or add the following:

- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



49 Service Level

This screen allows you to maintain the service levels in the system. You can apply these to orders in the [Orders](#) screen.



Service levels

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

- **Code** - the service level code.
- **Description** - the name.
- **Active**.

The following actions are available on the Details panel:

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

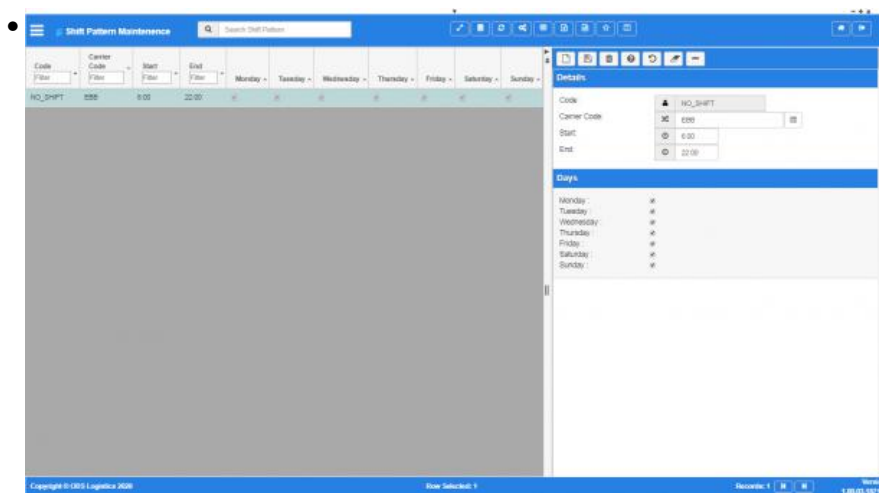
You can change or add the following information:

- **Code** - the service level code.
- **Description** - the name.



50 Shift Pattern

This screen allows you to maintain driver shift patterns in the system. You can assign these to drivers in the [Drivers](#) screen.



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

- *Code.*
- *Carrier Code.*
- *Start.*
- *End.*
- *Monday.*
- *Tuesday.*
- *Wednesday.*
- *Thursday.*
- *Friday.*
- *Saturday.*
- *Sunday.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:



50.1 Details section

- *Code* the shift code.
- *Carrier Code* - the carrier code. You can select the carrier code from a list by clicking the  **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all carriers in the system. You can select the carrier by clicking on the carrier in the list, or cancel entry by closing the window.
- *Start* - the start time of the shift.
- *End* - the end time of the shift.

50.2 Days section

This section allows you to indicate through check boxes that these hours apply to that day.

- *Monday.*
- *Tuesday.*
- *Wednesday.*
- *Thursday.*
- *Friday.*
- *Saturday.*
- *Sunday.*










51 Supplier

This screen allows you to maintain the suppliers in the system.

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


- *Code.*
- *Name.*
- *Group.*
- *Organisation Code.*
- *VAT Reg No.*
- *Country Code.*
- *Company Number.*
- *Accounting Code.*
- *VAT Code.*
- *Currency Code.*
- *Invoice Frequency.*
- *Payment Term Days.*
- *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:

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

51.1 Details section

- *Code.*
- *Name.*
- *Group* - a drop-down list of customer groups configured in the system. You can configure customer groups in the [Customer Groups](#) screen.
- *Organisation Code* - a drop-down list of organisations configured in the system. You can configure organisations in the [Organisation](#) screen.
- *Country Code* - a drop-down list of countries configured in the system. You can configure countries in the [Countries](#) screen...
- *Company Number*
- *VAT Reg No.*
- *Carrier* - the carrier code used by the supplier. You can look up a list of carrier codes configured in the system using the  **Lookup** button to the right of the entry field. The screen will pop-up a window to select a carrier code. You can configure carriers in the [Carriers](#) screen.



51.2 Invoicing section

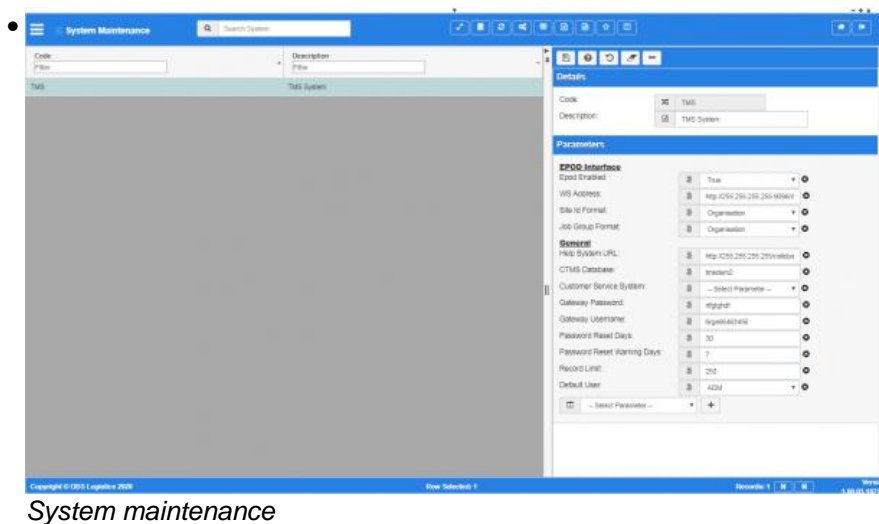
- *Accounting Code*.
- *VAT Code* - the VAT code used by the supplier. You can look up a list of VAT codes configured in the system using the  **Lookup** button to the right of the entry field. The screen will pop-up a window to select a VAT code. You can configure VAT codes in the [VAT Codes](#) screen.
- *Currency Code* - the currency code used by the supplier. You can look up a list of currency codes configured in the system using the  **Lookup** button to the right of the entry field. The screen will pop-up a window to select a currency code. You can configure currency codes in the [Currencies](#) screen.
- *Invoice Frequency* - a drop-down list used to determine the invoice interval, Values: Weekly; Monthly; Yearly.
- *Payment Term Days*.



52 System

This screen allows you to maintain the system parameters for each part of your implementation.

 Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



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

- *Code* - the system code
- *Description* - the system description.
- *Active*.

The following actions are available on the Details panel:

- **Save** - save a new record or changes to an existing record.
- **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 the following information:

52.1 Details section

- *Description* - the system description.

52.2 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.

The available parameters are configurable in the [System Parameters](#) screen.



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
Auto-Planning				
Auto-planning is enabled	Auto-planning is enabled	Auto-planning is enabled	CheckBox	Integer
Auto-planning sleep (seconds)	Auto-planning sleep (seconds)	Auto-planning sleep (seconds)	TextBox	Integer
EPOD Interface				
Complete On RTD	Complete On RTD	Epod Complete On RTD	TextBox	String
Email Address From	Email Address From	Epod Email Address From	TextBox	String
Email Address To	Email Address To	Epod Email Address To	TextBox	String
Epod Enabled	Epod Enabled	Epod Enabled	DropDownList	False,True
Epod Lines as Products	Epod lines as products. Sends and receives order lines as EPOD product details		DropDownList	False,True
Job Group Format	Job Group Format	Epod Job Group Format	DropDownList	Organisation,Carrier,Customer Group, Customer
Site Id Format	Epod Site Id Format	Epod Site Id Format	DropDownList	Database name,Organisation,Carrier,Carrier Group
WS Address	Epod WS Address	Epod Web Service Address	TextBox	String
WS Timeout	Epod WS Timeout	Number of minutes before a WS message will be set to Held	TextBox	Integer
General				
Amber time	Amber time	Threshold of time a driver can take before his/her trip is colored Amber	TextBox	String
Color Code	Default Color Codes	Default Color Codes	TextBox	String
CTMS Database	CTMS Database	CTMS Database	TextBox	String
Customer Service System	Customer Service System	Customer Service System	DropDownList	Native, C-TMS
Default User	Default User	Default User	DropDownList	Configured users
Gateway accept message	Gateway accept message	Gateway accept message	TextBox	String
Gateway decline message	Gateway decline message	Gateway decline message	TextBox	String
Gateway Password	Gateway Password	Gateway Password	TextBox	String
Gateway status message	Gateway status message	Gateway status message	TextBox	String
Gateway Username	Gateway Username	Gateway Username	TextBox	String
Help System URL	Help System URL	Help System URL	TextBox	String



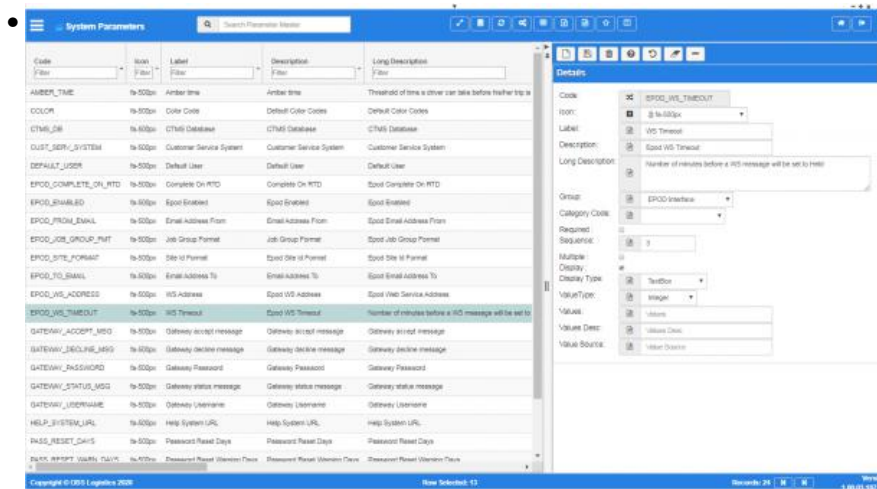
Label	Description	Long Description	Type	Values
Lookup Limit	Lookup Limit	Lookup Limit	TextBox	Integer
Password Reset Days	Password Reset Days	Password Reset Days	TextBox	Integer
Password Reset Warning Days	Password Reset Warning Days	Password Reset Warning Days	TextBox	Integer
Record Limit	Record Limit	Record Limit	TextBox	String
Red time	Red time	Threshold of time a driver can take before his/her trip is colored Red	TextBox	String
Schedule Changeover	Schedule Changeover	Schedule Changeover	TextBox	String
Schedule Format	Schedule Format	One of: YYYYMM, YYMMDD, YYYYWW	TextBox	String
Schedule Generation Period	Schedule Generation Period	Schedule Generation Period	DropDownList	Daily, Weekly, Monthly
Schedule Order Configuration	Schedule Configuration	Schedule Configuration	DropDownList	Collection From,Collection To,Delivery From,Delivery To
Service Email Address From	Service Email Address From	Windows Service Email Address From	TextBox	String
Service Email Address To	Service Email Address To	Windows Service Email Address To	TextBox	String
System Id	System identifier	System identifier	TextBox	String
Trunk Load Rate Zero	Trunk Load Rate Zero	Override the Load Rate of RDCs to Zero on Trunk Routes	CheckBox	true, false



53 System Parameters

This screen allows you to maintain the parameters that control basic functions of the system.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



System parameters maintenance

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

- **Code.**
- **Icon.**
- **Label.**
- **Description.**
- **Long Description.**
- **Group Code.**
- **Category Code.**
- **Required.**
- **Sequence.**
- **Multiple.**
- **Display.**
- **Display Type.**
- **ValueType.**
- **Values.**
- **Values Desc.**
- **Value Source.**
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.



- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

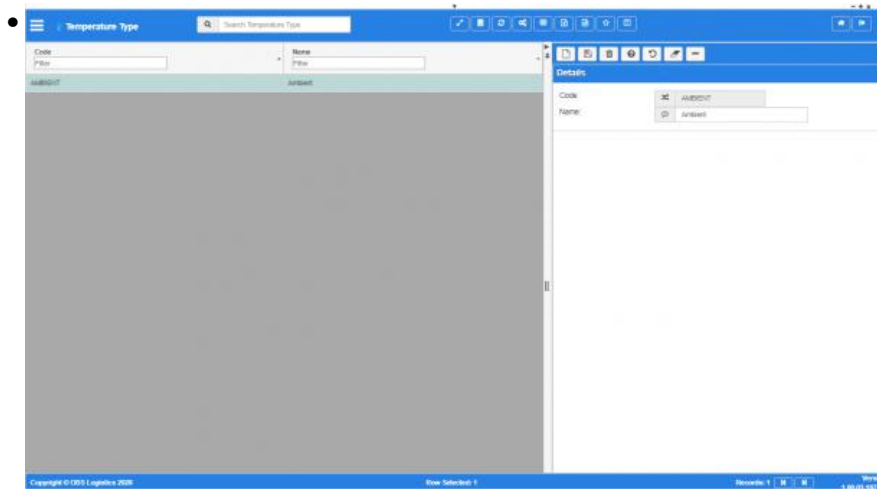
You can change or add the following:

- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



54 Temperature Type

This screen allows you to maintain the temperature types in the system. You apply these to product types when you create them in the [Product Types](#) screen.



Temperature types maintenance

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

- *Code.*
- *Name.*
- *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:

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

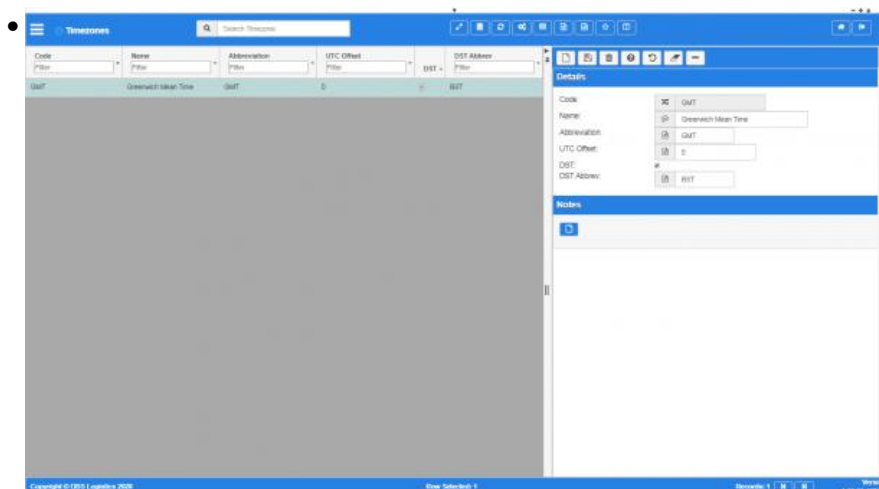
You can change or add the following information:

- *Code* - the temperature type.
- *Description* the temperature type description.



55 Timezones

This screen allows you to maintain the timezones in the system. You can select the timezone when creating countries in the [Countries](#) screen.



Timezones maintenance

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

- **Code** - the timezone code.
- **Name** - the timezone name.
- **Abbreviation** - the abbreviation.
- **UTC Offset** - the number of hours offset from universal time (UTC).
- **DST** - daylight saving time.
- **DST Abbrev** - abbreviation shown when DST.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the timezone code.
- **Name** - the timezone name.
- **Abbreviation** - the abbreviation.
- **UTC Offset** - the number of hours offset from universal time (UTC).
- **DST** - a checkbox indicating whether this timezone applies daylight saving time.
- **DST Abbrev** - the abbreviation shown when DST.



55.1 Notes section

You can add notes through the Notes section.

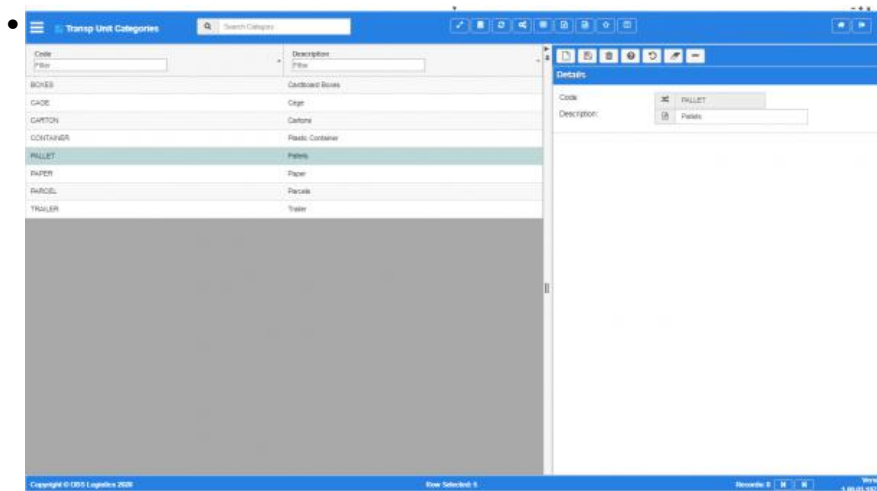
You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.



56 Transport Unit Categories

This screen allows you to maintain the transport unit categories in the system. These are used when you create transport units in the [Transport Units](#) screen.



Transport unit categories maintenance

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

- **Code** - the transport unit category code.
- **Description** - the transport unit category description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- **Code** - the transport unit category code.
- **Description** - the transport unit category description.



57 Transport Unit Parameters

This screen allows you to maintain the parameters associated to the transport units, maintained in the [Transport Units](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

The screenshot shows the 'Transport Unit Parameters' maintenance screen. The main area displays a table with columns: Code, Icon, Label, Description, Long Description, Group Code, Category Code, Required, and Sequence. The table contains three rows of data for conversion parameters. The details panel on the right shows the configuration for the selected record, including fields for Code, Icon, Label, Description, Long Description, Group, Category Code, Required, Sequence, Multiple, Display, Display Type, Value Type, Values, Values Desc, and Value Source.

Transport unit parameters maintenance

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the parameter code, which must be unique.
- *Icon* - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- *Label* - the short label, displayed when selecting a parameter.
- *Description* - additional descriptive help.
- *Long Description* - additional descriptive help.
- *Group Code* - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- *Category Code* - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- *Required* - a check-box controlling whether the parameter is required entry.
- *Sequence* - the sequence in which the parameter is displayed.
- *Multiple* - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- *Display* - a check box controlling whether the parameter is displayed to the user.
- *Display Type* - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- *ValueType* - the basic validation. Values are: String; Integer.
- *Values* - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- *Values Desc* - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- *Value Source* - if you want to source data from the database for drop-down lists, you can add the query here.



Transport Units											
Code	Description	Base Unit Equivalent (BUE)	Volume (m³)	Volume Colapsed (m³)	Weight (kg)	Width (m)	Length (m)	Height (m)	Volume Fixed	Weight Fixed	
1		0.0019629	0.0019629	0	0.0075	0.16	0.2	0.0091			
100	100	0.19625	0.19625	0	0.75	0.16	0.2	0.01			
1000	1000	0.19625	0.19625	0	7.5	0.16	0.2	0.015			
1000ygn	1000ygn	1	1	0	90	1	1	1			
5000	5000	1	0.079125	0	37.5	0.16	0.2	0.06			
BOTTLE	BOTTLE	0.0036	0.0036	0	0.04	0.08	0.08	0.015			
BOX	BOX	0.19625	0.19625	0	7.5	0.16	0.2	0.015			
BOXES	BOXES	0.19625	0.19625	0	7.5	0.16	0.2	0.016			
CAGE	Cage	0.46	0.73	0.73	520	0.6	0.9	1.355			
CHARGE	CHARGE	0	0	0	0	0	0	0			
EACH	EACH	0.0019629	0.0019629	0	0.0075	0.16	0.2	0.0091			
EVF	EVF	0.0019629	0.0019629	0	0.0075	0.16	0.2	0.0091			
EV/S	EV/S	0.0019629	0.0019629	0	0.0075	0.16	0.2	0.0091			
MC	MC	0.0003	0.0003	0	0.02	0.001	0.001	0.001			
METRES	METRES	0.0001	0.0001	0	0.06	0.001	0.001	0.001			
Mex	Mex	0.0001	0.0001	0	0.05	0.001	0.001	0.001			
Pack	Pack	0.15625	0.15625	0	7.5	0.16	0.2	0.015			
PAU	PAU	0.0039	0.0039	0	0.04	0.08	0.08	0.016			
REEL	REEL	1	1	0	50	1	1	1			
ROLL	ROLL	1	1	0	20	1	1	1			

You can change or add the following information:

- *Code* - the transport unit code.
- *Description* - the description of the transport unit.
- *Base Unit Equivalent (BUE)* - how many BEU is this transport unit considered to be the equivalent of?
- *Volume (m³)*.
- *Volume Collapsed (m³)*.
- *Weight (kg)*.
- *Width (m)*.
- *Length (m)*.
- *Height (m)*.
- *Volume Fixed* - a check box indicating that the volume is fixed.
- *Weight Fixed* - a check box indicating that the weight is fixed.
- *Footprint Fixed* - a check box indicating that the footprint is fixed.
- *Allow Decimals* - a check box indicating that the unit quantity can be provided in decimal values rather than whole numbers.
- *Category Code* - a drop-down list of all transport unit categories configured in the system. You can maintain transport unit categories in the [Transport Unit Categories](#) screen.
- *Asset Tagged* - a check box indicating that the asset is permanent and trackable.
- *Stackable Unit Height*.

58.1 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.

The available parameters are configurable in the [Transport Unit Parameters](#) screen.

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:

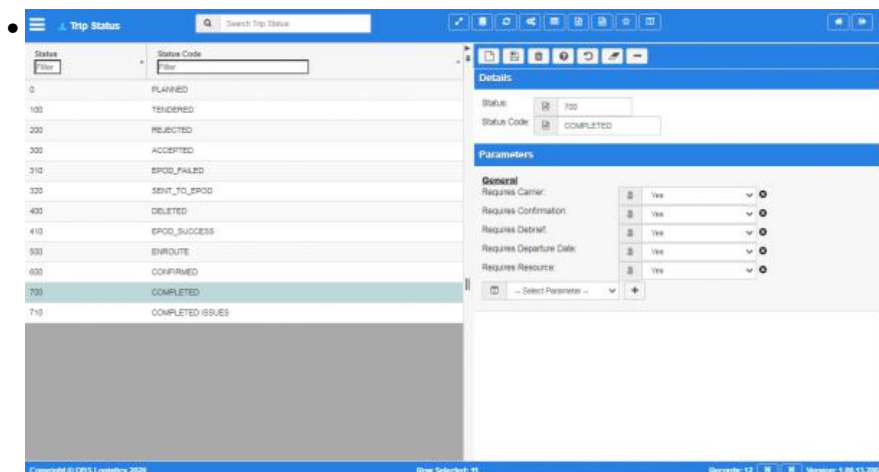
Label	Description	Long Description	Type	Values
Conversion Code	Conversion Code	Conversion Code	DropDownList	All available transport unit types.
Conversion Type	Conversion Type	Conversion Type	DropDownList	Multiply, Round, Exclude, As Received
Conversion Value	Conversion Value	Conversion Value	TextBox	Integer



59 Trip Status Parameters

This screen allows you to maintain the parameters associated to the trip statuses, maintained in the [Trip Status](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



Trip Status parameters maintenance

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the parameter code, which must be unique.
- *Icon* - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- *Label* - the short label, displayed when selecting a parameter.
- *Description* - additional descriptive help.
- *Long Description* - additional descriptive help.
- *Group Code* - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- *Category Code* - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- *Required* - a check-box controlling whether the parameter is required entry.
- *Sequence* - the sequence in which the parameter is displayed.
- *Multiple* - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- *Display* - a check box controlling whether the parameter is displayed to the user.
- *Display Type* - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- *ValueType* - the basic validation. Values are: String; Integer.
- *Values* - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- *Values Desc* - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- *Value Source* - if you want to source data from the database for drop-down lists, you can add the query here.



60 UDF Parameters

This screen allows you to maintain the parameters available controlling UDF (user-definable forms).

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.

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

- *Code.*
- *Icon.*
- *Label.*
- *Description.*
- *Long Description.*
- *Group Code.*
- *Category Code.*
- *Required.*
- *Sequence.*
- *Multiple.*
- *Display.*
- *Display Type.*
- *ValueType.*
- *Values.*
- *Values Desc.*
- *Value Source.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

- *Code* - the parameter code, which must be unique.
- *Icon* - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- *Label* - the short label, displayed when selecting a parameter.
- *Description* - additional descriptive help.
- *Long Description* - additional descriptive help.
- *Group Code* - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- *Category Code* - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- *Required* - a check-box controlling whether the parameter is required entry.
- *Sequence* - the sequence in which the parameter is displayed.



- *Multiple* - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- *Display* - a check box controlling whether the parameter is displayed to the user.
- *Display Type* - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- *ValueType* - the basic validation. Values are: String; Integer.
- *Values* - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- *Values Desc* - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- *Value Source* - if you want to source data from the database for drop-down lists, you can add the query here.

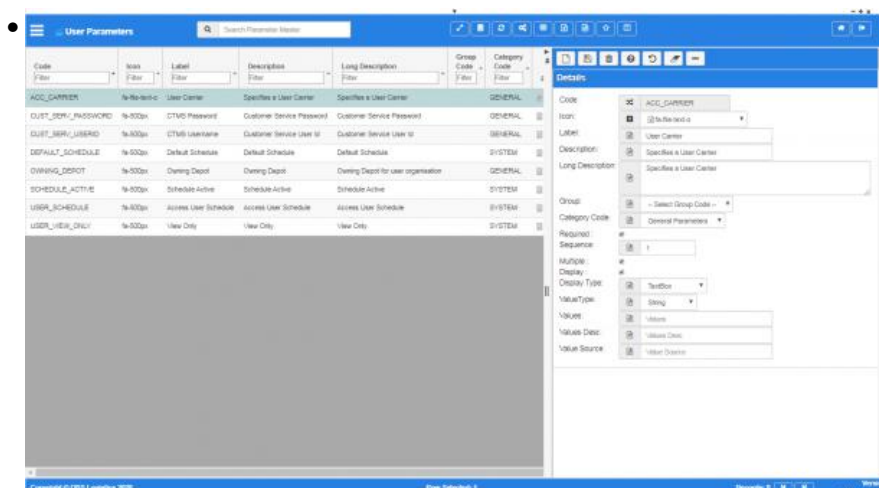


61 User Parameters

This screen allows you to maintain the parameters available for a specific user.

Once created, you can assign these to a user using the [Users](#) screen.

Warning: This is a system administrator function - if you change the settings here, this will affect all users of the system.



User parameters maintenance

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

- **Code.**
- **Icon.**
- **Label.**
- **Description.**
- **Long Description.**
- **Group Code.**
- **Category Code.**
- **Required.**
- **Sequence.**
- **Multiple.**
- **Display.**
- **Display Type.**
- **ValueType.**
- **Values.**
- **Values Desc.**
- **Value Source.**
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.



- **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:

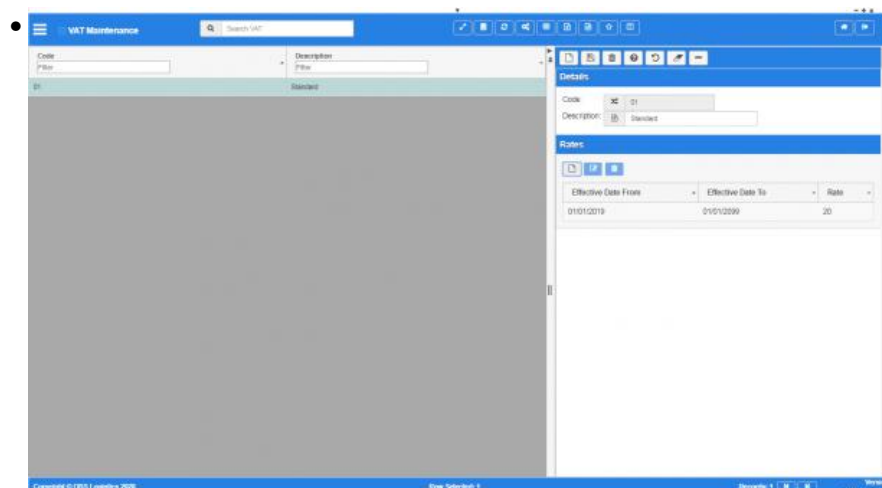
- **Code** - the parameter code, which must be unique.
- **Icon** - the icon displayed when the parameter is used. This can be selected from a drop-down list of available icons.
- **Label** - the short label, displayed when selecting a parameter.
- **Description** - additional descriptive help.
- **Long Description** - additional descriptive help.
- **Group Code** - a drop-down list of groups. When screens display these parameters, this settings groups parameters together under a banner. You can maintain parameter groups in the [Parameter Group](#) screen.
- **Category Code** - categorization of the parameter. You can maintain parameter categories in the [Parameter Category](#) screen. Values are typically: EPOD Parameters; Finance Parameters; General Parameters; Order Parameters; Portal Parameters.
- **Required** - a check-box controlling whether the parameter is required entry.
- **Sequence** - the sequence in which the parameter is displayed.
- **Multiple** - a check box controlling whether you can select the parameter multiple times and have multiple values for the same parameter.
- **Display** - a check box controlling whether the parameter is displayed to the user.
- **Display Type** - the type of entry the screen uses for the parameter. Values are: DropDownList; TextBox.
- **ValueType** - the basic validation. Values are: String; Integer.
- **Values** - the values that will be stored for a drop-down list. There must be the same number of values as descriptions (below).
- **Values Desc** - the descriptions displayed against the values in a drop-down list. There must be the same number of values as descriptions (above).
- **Value Source** - if you want to source data from the database for drop-down lists, you can add the query here.



62 VAT Codes

This screen allows you to maintain the VAT codes in the system. These are used in various places, including:

- **Supplier.**
- **Customer.**
- **Carriers.**



VAT codes maintenance

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

- **Code** - the vat rate code.
- **Description** - the VAT rate description.
- **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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:


- **Code** - the vat rate code.
- **Description** - the VAT rate description.





62.1 Rates section

You can set the rate and dates when this VAT rate is applicable.


You can add the dates by clicking the  **New** button in the section.

You can edit dates by clicking the row in the table and then clicking the  **Edit** button in the section.

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

- *Effective Date From* - you can enter a date or use the  **Calendar** lookup provided to the right of the value entry.
- *Effective Date To* - you can enter a date or use the  **Calendar** lookup provided to the right of the value entry.
- *Rate*.

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

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



63 Vehicle Category

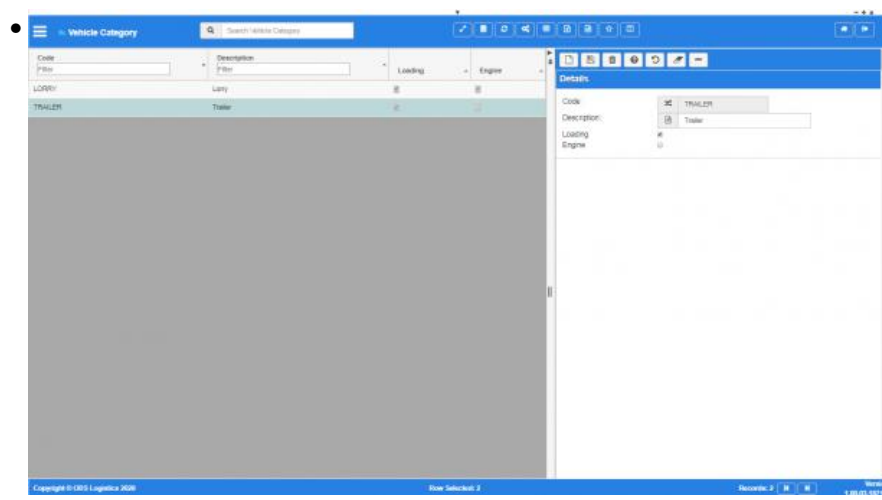
This screen allows you to maintain the vehicle categories in the system. Vehicle categories are used to define the general parameters of vehicle types and you can assign these to vehicle types in the [Vehicle Types](#) screen.

Vehicles in CTL-TMS cover many types of vehicle, for example:

- Vans.
- Tractor units.
- Trailers.

These are categorised here to determine whether the vehicles in these categories:

- have an engine, and can therefore transport goods e.g. van, tractor.
- have loading capacity, and can therefore carry goods e.g. van, trailer.



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

- *Code.*
- *Description.*
- *Loading.*
- *Engine.*
- *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:

- **New** - create a new record.
- **Save** - save a new record or changes to an existing record.
- **Delete** - delete an existing record.
- **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:

63.1 Details section

- *Code* - the vehicle category code.
- *Description* - the vehicle category description.
- *Loading* - a check box indicating whether the vehicle category has loading capacity to carry goods.
- *Engine* - a check box indicating whether the vehicle category has an engine in order to transport any goods carried directly or on attached trailers.



64 Category:Vehicle Data

CTL-TMS Reference Guide








All pages in this section refer to the creation and maintenance of Vehicle-related data



This screen allows you to maintain the vehicle types in the system. Vehicle types are used to define the general parameters of a vehicle and you can assign these to vehicles in the [Vehicles](#) screen.



- *Code.*
- *Category Code.*
- *Description.*
- *Max Weight (kg).*
- *Volume (m³).*
- *Length (m).*
- *Axles No.*
- *Max Base Unit Equivalent.*
- *Max Footprint.*
- *Max Speed (mph).*
- *Fuel Efficiency (mpg).*
- *Moffett.*
- *Hiab.*
- *Refrigerated.*
- *Active.*
- *Created By.*
- *Created Date.*
- *Last Updated By.*
- *Last Updated Date.*
- *Last Active Change By.*
- *Last Active Change Date.*
- *Last Process Id.*
- *Update Counter.*

-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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 click on a line to see the details in a pop-out Detail panel.


65.1 Details section

You can change or add the following information:

- *Code* - the vehicle type code.
- *Category Code* - a drop-down list of vehicle categories. You can configure vehicle categories through the [Vehicle Category](#) screen.
- *Description* - the vehicle type description.
- *Max Weight (kg)* - the maximum weight in kilos that the vehicle type can carry.
- *Volume (m³)* - the maximum volume that the vehicle type can carry.
- *Length (m)* - the length of the vehicle type.
- *Axles No* - the number of axles on the vehicle type.
- *Max Base Unit Equivalent* - the maximum number of items carried by the vehicle type in base units equivalent or BUE.
- *Max Footprint* - the maximum footprint of any single item carried by the vehicle type.
- *Max Speed (mph)* - the maximum speed of the vehicle type.
- *Fuel Efficiency (mpg)* - the fuel efficiency.
- *Moffett* - a check box indicating whether the vehicle type has a moffett.
- *Hiab* - a check box indicating whether the vehicle type has a loader.
- *Refrigerated* a check box indicating whether the vehicle type has a refrigerated compartment.

65.2 Notes section

You can add notes through the Notes section.

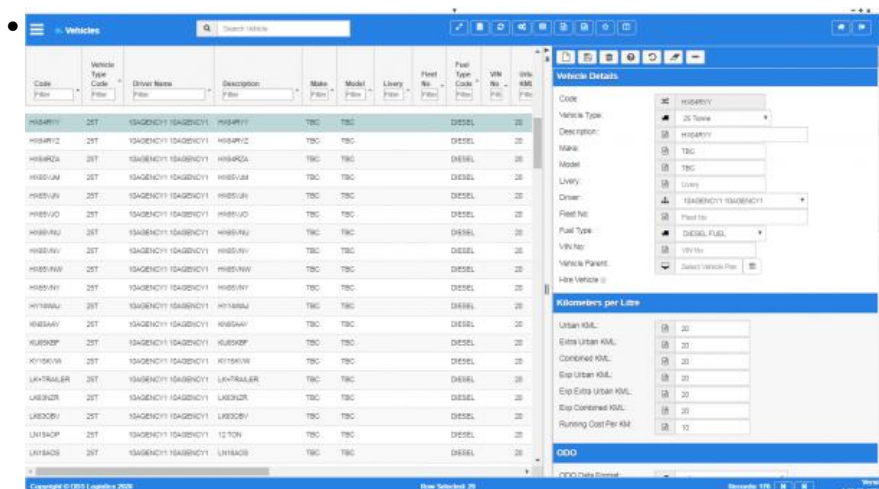
You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.



66 Vehicles

This screen allows you to maintain the vehicles in the system. Vehicles are used to define the specific parameters of a vehicle. You resource trips with vehicles.










Vehicles

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

- *Code.*
- *Vehicle Type Code.*
- *Driver Name.*
- *Description.*
- *Make.*
- *Model.*
- *Livery.*
- *Fleet No.*
- *Fuel Type Code.*
- *VIN No.*
- *Urban KML.*
- *Extra Urban KML.*
- *Combined KML.*
- *Exp Urban KML.*
- *Exp Extra Urban KML.*
- *Exp Combined KML.*
- *Running Cost Per KM.*
- *Parent Code.*
- *Hire Vehicle.*
- *Date Of Registration.*
- *On Hire Purchase Date.*
- *ODO Data Format.*
- *ODO Reading.*
- *Carriers.*
- *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:



-  **New** - create a new record.
-  **Save** - save a new record or changes to an existing record.
-  **Delete** - delete an existing record.
-  **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:

66.1 Vehicle Details section

- *Code* - the vehicle code. This is usually the registration.
- *Vehicle Type Code* - a drop-down list of all vehicle types configured in the system. You can configure vehicle types in the [Vehicle Types](#) screen.
- *Description* - the vehicle description.
- *Make*.
- *Model*.
- *Livery*.
- *Driver Name* - a drop-down list of all drivers. You can maintain drivers in the [Drivers](#) screen.
- *Fleet No.*
- *Fuel Type Code* - a drop-down list of fuels. Values: DIESEL FUEL; PETROL FUEL. The screen only prompts for this for vehicles with an engine.
- *VIN No.* The screen only prompts for this for vehicles with an engine.
- *Parent Code* - the parent vehicle, if this is combined with another vehicle, for example tractor/trailer combinations. You can see all configured vehicles by clicking the  **Lookup** button to the right of the value entry. The system will display a pop-up window listing all vehicles. You can select one by clicking on the row, or cancel entry by closing the pop-up window. The screen only prompts for this for vehicles without an engine.
- *Hire Vehicle* - a check box indicating whether this is a hire vehicle.

66.2 Kilometres per Litre section

The screen only prompts for these details for vehicles with an engine.


- *Urban KML*.
- *Extra Urban KML*.
- *Combined KML*.
- *Exp Urban KML*.
- *Exp Extra Urban KML*.
- *Exp Combined KML*.
- *Running Cost Per KM*.

66.3 ODO section


The screen only prompts for these details for vehicles with an engine.

- *ODO Data Format* - a drop-down list of formats. Values: Miles; KM.
- *ODO Reading* - the odometer reading from the vehicle.

66.4 Dates section



- *Date Of Registration* - the date the vehicle was registered with the company. The screen provides a  **Calendar** look-up through a button to the right of the value entry.
- *Age* - the age of the vehicle is displayed here, based on the Date of Registration entered.




- **On Hire Purchase Date** - this is only available if the vehicle is on-hire. This allows you to enter the On Hire date. The screen provides a  **Calendar** look-up through a button to the right of the value entry.

66.5 Carriers section


You can assign the resource to any number of carriers.

You can assign the resource to a carrier by clicking the  **New** button in the section header. The screen will display a pop-up window to allow you to identify the carrier to which you want to assign the vehicle. You can enter a carrier code or click the  **Lookup** button to the right of the value entry to see a list of all carriers. You can select a carrier from this list to select it or close the window to cancel entry. Once you have selected or entered a carrier, you can save the resource to this carrier using the **Save** button. You can cancel adding the resource to the carrier by closing the window.

You can remove a resource from a carrier by selecting the carrier in the table and then clicking the  **Delete** button in the section header.

66.6 Notes section

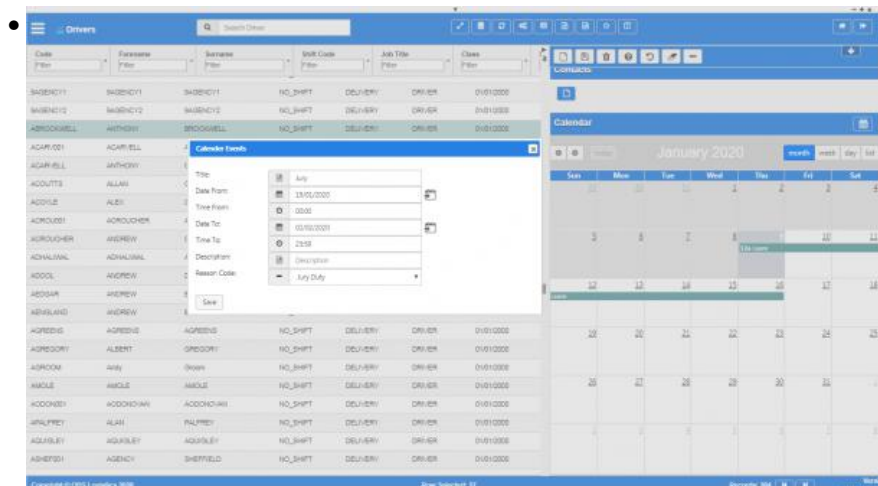
You can add notes through the Notes section.

You can click the  **New** button in the Notes section to create a new note. This will be tagged with your user name and date/time.

Any notes may be removed by clicking the **x** in the corner of the note.

66.7 Calendar section

You can control availability through the Calendar section.



Driver availability calendar

Here, you can determine the period (hours, days, weeks) where this resource is unavailable.

The section shows a calendar. You can choose to display this in a month, week, day or list format, using the buttons in the title.

- In the month view, the whole month is shown. Events are displayed as the time hours plus an "a" for AM or "p" for PM, followed by the title underneath.



- in the week view, the whole week is shown with all hours in each day. Events are displayed as a block on the days and hours booked, showing the range of times followed by the title underneath.
- in the day view, the whole day is shown with all hours in the day. Events are displayed as a block on the hours booked, showing the range of times followed by the title underneath.
- In the list view, all events in a month are shown. Headers are added to the list for those days with events, showing the full date and day. An entry is shown for each day of the event, showing the time range and the title.

You can move between days, weeks or months using the left and right buttons in the calendar header.



If you click on a day in month view, you will be taken to that day in the day view.

If you drag to select a range of days, the screen will display a Calendar Events pop-up for you to enter the details. The dates from and to will be set to the selected dates, the times from set from midnight to midnight.

If you click on an hour in week or day view, the screen will display a Calendar Events pop-up for you to enter the details. The dates will be set to the selected date, the time from set to the selected time, and the time to set as midnight.

You cannot add events from the event list directly.

The Calendar Events pop-up allows you to enter the following:

- *Title* - the title of the event. The screen will display this in the calendar.
- *Date From* - the range of the event. This can be multiple days or hours. You can use the  **Calendar** look-up button to help selecting a date.
- *Time From*.
- *Date To* - you can use the  **Calendar** look-up button to help selecting a date.
- *Time To*.
- *Description* - the description.
- *Reason Code* - a drop-down list of all of the configured resource reason codes. You can configure these codes in the [Resource Reason Codes](#) screen.



The pop-up will default the dates and times as you selected them from the calendar initially (for a new event) or the details of the event selected. Although the values are pre-set, you can change them here.

You can save a new event with the **Save** button.

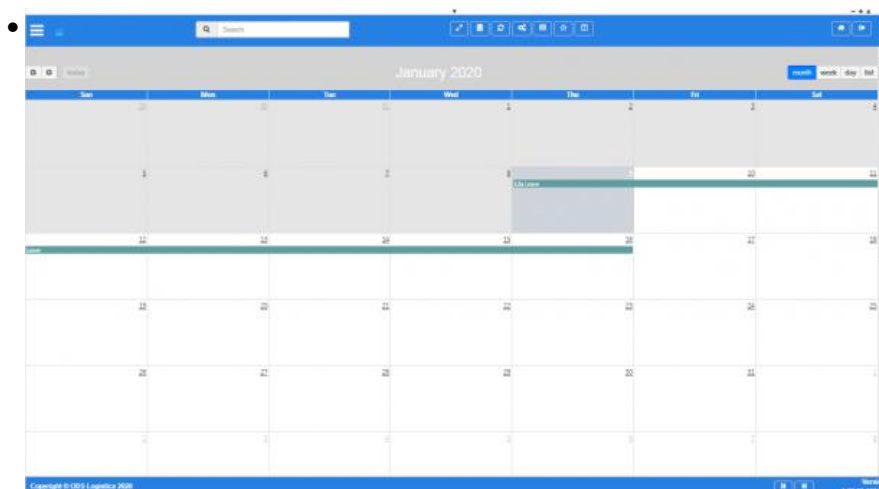
You can update an existing event with the **Update** button, or delete the event with the **Delete** button.

You can enter or update the event by closing the window.

Once saved, the event will be displayed in the main calendar.

 **Note:** If you need more room to edit the calendar, you can click the  **Calendar** button in the title. The system will open a new tab in your browser with a full-screen calendar view. This full-screen view operates in the same way as the embedded calendar.





Full-screen calendar

