This screen allows you to control the booking process of an order, and control the continued contact with the customer to affect a seamless delivery.

Here, you can:

- Quickly find orders through a variety of criteria.
- See all pertinent information about the customer's order, to aid in responding to customer queries.
- Add instructions to the driver, including "Call X Minutes Before Arrival" information.
- Add additional time processing the order.
- Book an order.
- Hold or release an order.
- Add additional services.
- Control contact with the customer

Warning: Booking an order does not plan the order onto a trip - that will be completed by the planning team using the Planning screen. After the order is planned, a booking confirmation email will be sent to the end customer for them to agree the booking and time (4-hour delivery window) that has been planned. This screen simply controls the communication with the customer in order to effectively agree a date, providing decision assistance by showing all available information to aid you in making a decision.

You can query orders by entering criteria in the Search panel:

- *Supplier* - a drop-down list of all configured suppliers in the system. You can maintain suppliers in the Supplier screen.
- *Customer* - the orders' customer code. You can maintain customers in the Customer screen. You can enter the code directly or use the **Lookup** button to find a customer. The screen will display a pop-up customer search window, allowing you to search by *Name*, *Address* or *Postcode*. You can enter partials of any of these. You can cancel the query by closing the pop-up window, or display matching results by pressing the **Find** button. The screen will display a pop-up window of matching customers in a results table. You can return to the customer search window by closing the results window or clicking the **Cancel** button. You can select a customer by clicking on the row for that customer. The screen will close both the results and customer search windows and enter the customer code for you.
- *Customer Ref* - the order's customer reference.
- *Booking Status* - a drop-down list of all booking statuses. The screen will default this to DECLINED, but this can be changed or removed here.
- *Order Status* - a drop-down list of all order statuses configured in the system. You can maintain order statuses in the Order Status screen.
- *Order Type* - a drop-down list of all order types configured in the system.
- *Group Code*.
- *Supplier Contact* - a drop-down list to choose whether to select a supplier contact.
- *Current Location* - the current location of the order.
- *Date From* - the date from which orders are selected. The screen will default this to today's date. You can enter the date directly or use the **Calendar** button to select a date. The date cannot be more than 7 days in the past.
- *Date To* - the date up to which orders are selected. The screen will default this to 10 days into the future. You can enter the date directly or use the **Calendar** button to select a date. The date cannot be less than the date from.

You can reset the query criteria to the default values by clicking the **Clear** button.

You can click the **Find** button to execute the query - the screen will display the matching orders in the results table.

You can choose to display the following fields in the results table:

- *Deliver From*.
- *Deliver To*.
- *TMS Ref*.
- *Customer Ref*.
- *Deliver To Name*.
- *Deliver PostCode*.
- *Deliver Postal Region*.
- *Supplier*.
- *Booking Status*.
- *Contact Attempts*.
- *Group Code*.
- *Status Code*.
- *Service Level*.
- *Collect From Name*.
- *Collect From*.
- *Collect By*.

- *Supplier Contact*.
- *Order Type*.
- *Current 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*.

You can select an order to view or edit by clicking on the row - the screen will display the Details panel.

Note: The last 10 orders you select will be shown in the Recent Orders list in the Search panel - you can quickly re-select a previous order (regardless of search criteria you now have) by clicking on the order row in this list - the screen will display the Details panel.

The details panel is made up of multiple sections:

- Common order details, situated on the top-left of the screen.
- Additional details, situated in the top-right of the screen. You can select different detailed information to view or edit using the tab bar provided.
- Notes, situated at the bottom of the screen.

Common Order Details section

This section displays:

- *Booking Status* - the booking status.
- *Order Ref* - the TMS order reference.
- *Customer Ref* - the order's customer reference.
- *Status* - the order status.
- *Supplier Code* - the supplier of the order.
- *Collection* details, including the address and collection window.
- *Delivery* details, including the address and delivery window.
- *#Attempts* - the number of contact attempts made to the customer.
- *Revenue* - the total revenue that will be accrued from this order, from the customer's rate card.
- *Weight* - the total weight of all items on this order.
- *Items* - the number of items on this order.
- *Volume* - the total volume of the items on this order.
- *Service Level* - the order's service level.

You can enter or amend the following:

- *Driver Instructions* - any general instructions to the driver.
- *Call Before* - the number of minutes before arrival to call the customer.
- *Assembly Time* - additional time taken at the delivery point for this order, typically assembly or fitment/installation time.

You can save the changed details of the order in this section using the **Save** button. The screen will leave the order open for further amendments. If you have finished with the order, you can click the **Save and Close** button instead to save the details and close the details window.

You can refresh the order details using the **Refresh** button.

You can close the details section without saving any changes using the **Close** button.

Additional Details section

The Additional Details section consists of the following tabs:

- *Contact* - customer contact information.
- *Booking* - book the dates and times of the job.

- *Requirements* - a facility to add equipment and services to the job.
- *Trips* - the booked trip for the job, in terms of pickup and drop-off times.
- *Items* - the booked items.

Contact tab

This tab shows all of the end customer contact information for the order in a table.

You can log several contact actions here using the buttons provided:

- **Failed contact** - use this when you have attempted to contact the customer with no reply. The screen will automatically log a note saying that you have attempted to contact the customer at this time and will update the number of contact attempts, displayed on the Common Details panel.
- **Email Sent** - use this when you have sent an email to the customer. The screen will automatically log a note saying that you have attempted to contact the customer at this time.
- **Contact Supplier** - use this when you contact the supplier of the order. The screen will automatically log a note saying that you have attempted to contact the supplier at this time.

Booking tab

This tab allows you to modify the delivery date of the order based on the customer's requirements.

You can manually set a booking date and time window here. You can also manually select a date from a pop-up calendar using the **Calendar** button provided.

The screen will display a calendar of all available dates for booking the order delivery. The calendar will indicate available booking dates. You can click a date on this calendar to see trips that have already been planned on this date. The screen will display a table of the planned trips, with summarised planned information, to provide you with some decision assistance as to whether the order is achievable on this date:

- *Schedule* - the schedule.
- *Trip* - the trip ID.
- *VOL* - the volume of the items planned on this trip.
- *WGT* - the weight of the items planned on this trip.
- *TME* - the time taken for the orders planned on this trip.
- *DIST* - the distance already planned on this trip.
- *Drops* - the number of drops being made in the postal region, code or area.
- *Near* - a count of how many orders there are.

Once you have selected a date, the date will be entered at the top of the tab panel. You can take the following booking actions:

- **Book -** book the order for the entered date and time window. The order delivery window will be modified to match this, and the booking status will be set to "PRE-AGREED".
- **Hold** - hold this order until the date specified. The booking status of the order will be set to "HELD".
- **Release** - release any held order. The order delivery window will be modified to match this, and the booking status will be set to "PRE-AGREED".
- **Cancel** - cancel the order. The order status will be set to "CANCELLED".

Requirements tab

This tab allows you to set any additional equipment or services against the order. You can select from a drop-down list of configured services or equipment.

When you have selected the service or equipment, you can set the quantity and add it using the **New** button provided. The screen will add this to the displayed list of equipment and services.

Note: Depending on the customer's rate card, this may generate additional cost to the customer and therefore revenue for the order. The revenue will be displayed in the results table.

Trips tab

The screen will display any trips onto which the order has been planned, showing all pickup and drop-off stops. You can use this information to quickly answer queries from the customer as to the planning status and progress of the delivery.

The screen will display this information in a trips table, showing the following information:

- *Trip Ref*.
- *Status*.
- *Stop Type*.
- *Location Code*.
- *Location Name*.
- *Planned*.
- *Actual*.

Items tab

This section displays the summary of types of items on the order (the order lines) and can display each individual order item.

The screen displays the order summary (lines) in a table with the following fields:

- *Product Type*.
- *Type Description*.
- *Quantity*.
- *Transport Unit*.
- *Weight*.
- *Volume*.
- *Line No*.

You can see the items of this type by clicking the row in the table - the screen will display a table of item information, showing:

- *Product*.
- *Description*.
- *Length*.
- *Width*.
- *Height*.
- *Weight*.
- *Volume*.

Notes section

This section allows you to enter notes against the order. You can see all previously-entered notes in a list, with the most recent on the top.

Several of the actions that you take in this screen will automatically generate notes for you, to provide an audit trail of customer contact.

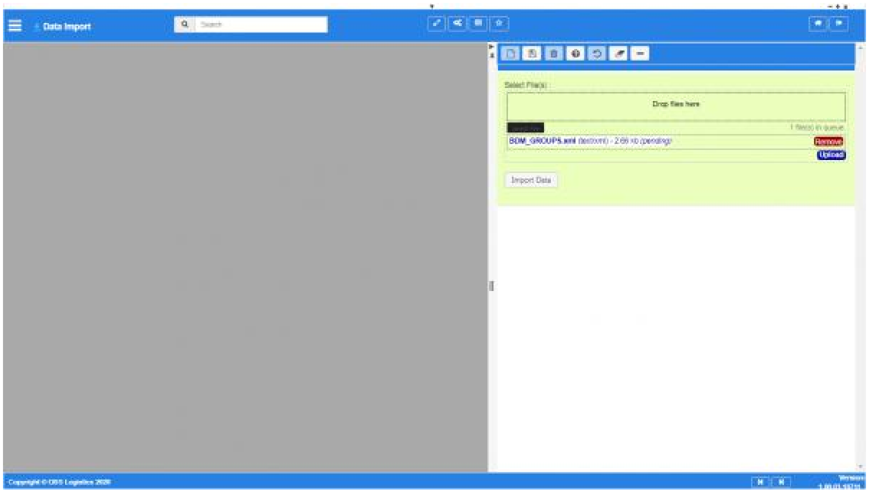
You can also enter any note, by keying the note in the *Add New Note* field and clicking the **Save** button when you have finished.

The screen logs the creation and amendment date, time and user of all entered notes, whether they were entered automatically or manually.

Contents

1 Data Import

This screen allows you to import data from a file.

- 

  Data import

Currently, files must be created in XML format in a proscribed manner. You should contact your OBS Logistics support team for formats for uploading these files.

You import a file by either dragging the file from your local PC to the section marked "Drop files here", or you can use the **Select File** button to select files from your local PC. The screen will display an explorer to select files.

You can select several files to upload in this manner.

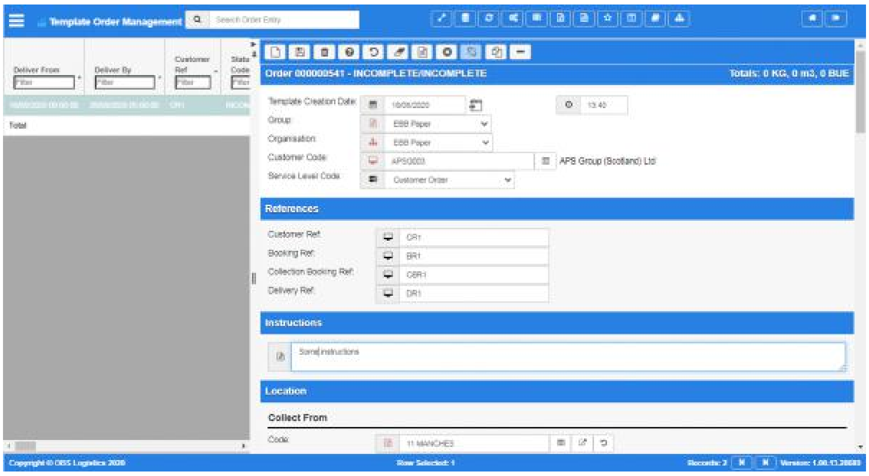
Once you have selected a file, you must then upload the files to the system using the **Upload** button, and remove the files by clicking the **Remove** button next to the file name.

When uploaded, you can import the uploaded files using the **Import Data** button. The screen will display a confirmation of the uploaded files, indicating whether there have been any issues. You can see the issues (or the confirmation message) by clicking on the file name. Furthermore, you can use the EDI Log screen to check for more details of any processing errors.

2 Order Templates

This screen allows you to enter order templates.

Note: In practically all ways, this screen works in the same way as the Orders screen.

- 

Order Templates screen

The screen has a more complex query filter than normal, due to the amount of data available to be entered for orders.

In this case, you select the field to be filtered from a drop-down list of all fields, then the operator, and then the value.

The list of fields are:

- *Deliver From*.
- *Deliver By*.
- *Customer Ref*.
- *Status Code*.
- *Execution Status*.
- *Collect From*.
- *Deliver To*.
- *Customer Code*.
- *TMS Ref*.
- *Order Entry Date*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Organisation Code*.
- *Collect From Code*.
- *Collect Address Line 1*.
- *Collect Address Line 2*.
- *Collect Address Line 3*.
- *Collect Town*.
- *Collect Country Code*.
- *Collect PostCode*.
- *Collect Postal Region*.
- *Deliver To Code*.
- *Deliver Address Line 1*.
- *Deliver Address Line 2*.
- *Deliver Address Line 3*.
- *Deliver Town*.
- *Deliver Country Code*.

- *Deliver PostCode*.
- *Deliver Postal Region*.
- *Collect From*.
- *Collect By*.
- *Owner Location Name*.
- *Owner Address Line 1*.
- *Owner Address Line 2*.
- *Owner Address Line 3*.
- *Owner PostCode*.
- *Owner Postal Region*.
- *Total Quantity*.
- *Total Volume (m³)*.
- *Total Weight (KG)*.
- *Total BaseUE*.
- *Revenue*.
- *Cost*.
- *Margin*.
- *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 operators are:

- *Is Equal To* - the orders' data must match your entered criteria exactly.
- *Is Not Equal To* - the orders' data must not match your entered criteria exactly.
- *Is Greater Than* - the orders' data must be greater, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Less Than* - the orders' data must be less than, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Greater or Equal To* - the orders' data must be greater than or exactly equal to, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Less Than or Equal To* - the orders' data must be less than or exactly equal to, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is In* - the orders' data must be one of the values you listed in your criteria.
- *Is Not In* - the orders' data must be one of the values you listed in your criteria.
- *Is Like* - the orders' data must be similar to your entered criteria. Note that you must use a percentage symbol as a wildcard e.g. to find anything with the word "PLAN" anywhere, enter *%PLAN%*, but find only things that start with "PLAN", enter *PLAN%*.
- *Is Not Like* - the orders' data must be similar to your entered criteria. The percentage wildcard can also used here.

When you have entered your query criteria, you can run the query using the **Submit** button.

You can clear the criteria entered by clicking the **Reset** button. This will display the Results Table, as seen below.

The pop-up can be closed with the **Cancel** button or by closing the pop-up window.

You can choose to display data as follows:

- *Deliver From*.
- *Deliver By*.
- *Customer Ref*.
- *Status Code*.
- *Execution Status*.
- *Collect From*.
- *Deliver To*.
- *Customer Code*.
- *TMS Ref*.

- *Order Entry Date*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Organisation Code*.
- *Collect From Code*.
- *Collect Address Line 1*.
- *Collect Address Line 2*.
- *Collect Address Line 3*.
- *Collect Town*.
- *Collect Country Code*.
- *Collect PostCode*.
- *Collect Postal Region*.
- *Deliver To Code*.
- *Deliver Address Line 1*.
- *Deliver Address Line 2*.
- *Deliver Address Line 3*.
- *Deliver Town*.
- *Deliver Country Code*.
- *Deliver PostCode*.
- *Deliver Postal Region*.
- *Collect From*.
- *Collect By*.
- *Owner Location Name*.
- *Owner Address Line 1*.
- *Owner Address Line 2*.
- *Owner Address Line 3*.
- *Owner PostCode*.
- *Owner Postal Region*.
- *Total Quantity*.
- *Total Volume (m^3)*.
- *Total Weight (KG)*.
- *Total BaseUE*.
- *Revenue*.
- *Cost*.
- *Margin*.
- *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 screen has the following additional actions on the screen header:

- **Booking** - you can enter booking information once you have selected an order template.
- **Consolidate** - you can choose to consolidate multiple orders together by selecting multiple orders and then clicking this button.

2.1 Consolidating Order Templates

You can select multiple order templates by clicking when using the shift and/or control keys.

Once you have selected multiple order templates, you can click the **Consolidate** button in the screen header. The screen will display a pop-up window showing a summary of all of the order templates.

You can confirm the consolidation by clicking the **Consolidate Records** button, or cancel the consolidation by closing the window.

2.2 Adding or Editing an Order Template

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.
- **Template** - create an order template from a template.
- **Cancel** - cancel an order template.
- **Split** - Split an order template.
- **Copy** - Copy an existing order template.
- **Toggle** - toggle display of all accordion headers.

2.3 Order Template

You can create an order template from a saved order template.

When you click this button, the screen will display a list of all order templates created in the system:

- *Organisation Code*.
- *Customer Code*.
- *Collect From Name*.
- *Deliver To Name*.

To create a new order template, select the template from the list and click the **Submit** button. a new order template will be created, with the fields populated from the template, ready for you to amend and save like normal. Note that all details are copied, including lines and items.

2.4 Split an Order Template

You can split an order template into multiple additional order templates.

When you find the order template you want to copy, click the **Split** button. The screen will display a list of all the order lines.

- *TUnit* - Transport Unit Code.
- *Product* - Product Type Code.
- *Type Description*.
- *Width*.
- *Height*.
- *Length*.
- *Weight*.
- *Quantity*.
- *Volume*.
- *BaseUE* - Base Unit Equivalent.
- *Haz*.
- *Stackable*.
- *Include* - a tick box to indicate that this order line is included in the split.

You can then indicate how many order templates to split this into - the default is 2. You can split the order lines selected into new order templates using the **Split** button, or cancel the split with the **Cancel** button or by closing the window.

2.5 Copy an Order Template

You can copy an existing order template to create a new order template.

When you find the order template you want to copy, click the **Copy** button. This will create a copy of the order template with a new reference, ready for you to amend and save like normal. Note that all details are copied, including lines and items.

2.6 Order section

The header will display the status of the order template. This includes:

- The TMS reference number.
- The order status.
- The execution status.
- Totals:
  - Weight.
  - Volume.
  - BUE.

The section includes the following core order fields:

- *Order Entry Date* and time.
- *Group* - a drop-down list of all customer groups created in the system. You can maintain these in the Customer Groups screen.
- *Organisation* - a drop-down list of all organisations created in the system. You can maintain these in the Organisation screen.
- *Customer Code* - the customer code for the order template. You can maintain these in the Customer screen. You can look up the available customer 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.
- *Service Level Code* - a drop-down list of the service levels for the order template. You can maintain these in the Service Level screen.

2.7 References section

- *TMS Internal* - this is displayed for reference.
- *Customer Ref*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Delivery Ref*.

2.8 Instructions section

You can enter general order instructions for the execution of orders created from this order template here.

2.9 Location section

You can enter the details of the order template addresses here.

The section allows you to enter:

- *Collect From* - the address from which you will pick up the goods on orders created from this template.
- *Deliver To* - the address to which you will deliver the goods on orders created from this template.

Each address section allows you to enter the following information:

- *Code* - the location code. You can maintain locations in the Locations screen, or you can use the **View Details** button provided if you have entered a location, which will open a new tab showing the location information. You can enter a location code directly or use the **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all locations configured in the system. You can select a location by clicking on the row or cancel entry by closing the window. You can refresh the order location details from the location code by pressing the **Refresh** button.
- *Name*.
- *Address*.
- *Address 2*.
- *Address 3*.
- *Town*.
- *Postcode*.
- *Country*.
- *Instructions* - specific instructions for execution when at this address.

The screen will display the location on a map beneath the address. As the address is entered or modified, the Latitude and Longitude of the address will be calculated and displayed.

When both addresses are entered, the screen will display the following information below the delivery address:

- *Distance (KM)*.
- *Expected Driving Time*.

2.10 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.

2.11 Scheduling section

- *Collection Times* - you can enter the collection window using the date and times provided. You can enter the date directly or use the **Calendar** button provided.
- *Delivery Times* - you can enter the collection window using the date and times provided. You can enter the date directly or use the **Calendar** button provided.

If the system has any schedule rules configured, the screen will use the organisation, service level and/or customer and zones of the from and to locations to find a compatible schedule rule. If one is found, the system will automatically default the collection and delivery windows for the order based on the rule.

2.12 Requirements section

- *Temperature Type Code* - a drop-down list of all temperature types configured in the system. You can maintain these in the Temperature Type screen.
- *Vehicle Type* - a drop-down list of all vehicle types configured in the system. You can maintain these in the Vehicle Types screen.
- *Specified Carrier* - the specific carrier that is required for this order template. 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.

Here you can also indicate any special requirements that have been configured for orders in the system. You can configure Order Requirements in the Requirements screen.

The following are currently available:

- Ambient Temp only.
- Banksman.
- Dangerous.
- Detention.
- Abnormal Load Escort.
- Moffet.
- Extra Man Power.
- Installation at Delivery Location.
- Two Man Delivery.

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

2.13 Transport Unit section

You can enter the transport units, products or individual items transported on orders created from this template in this section.

You can add a quantity of transport units by clicking the **New** button in the section header.

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

Note that, when you select an existing transport unit, if there are any products or items to deliver, these will be shown in a number of tables below the transport units table:

- Products For Selected Transport Unit.
- Assets For Selected Transport Unit.
- Products For Selected Asset.

The screen will display a pop-up window to allow you to identify the following information:

- *Customer Order Reference* - an optional references against the ordered line.

- *Transport Unit Code* - a drop-down list of the transport unit types configured in the system. You can maintain these in the Transport Units screen.
- *Product Type* - The product type contained by the transport unit. You can maintain these in the Product Types screen. You can look up the available product types using the **Lookup** button under 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.
- *Description 1*.
- *Description 2*.
- *Pack Quantity* - the pack quantity of the product.
- *Quantity*.
- *Width* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Height* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Length* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Weight* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Volume* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *BaseUE* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Hazardous* - a check box indicating whether this contacts hazardous product.
- *Stackable* - a check box indicating whether these transport units are stackable.

You can save the transport unit quantity by clicking the **Save** button or cancel entry by closing the window.

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

You can add specific products to a transport unit by selecting the row in the table and then clicking the **New Product** button in the section header.

You can edit an existing product by selecting the row in the table and then clicking the **Edit** button above the "Products For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Product*.
- *Description*.
- *Quantity*.
- *Unit Weight*.
- *Height*.
- *Width*.
- *Length*.
- *Volume*.
- *Unit Factor*.

You can save the product by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing product by selecting the row in the table and then clicking the **Delete** button above the "Products For Selected Transport Unit" table.

You can add specific assets/identified items to a transport unit by selecting the row in the table and then clicking the **New Asset** button in the section header.

You can edit an existing asset by selecting the row in the table and then clicking the **Edit** button above the "Assets For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Asset ID*.
- *Description*.
- *Reference*.

You can save the asset by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing asset by selecting the row in the table and then clicking the **Delete** button above the "Assets For Selected Transport Unit" table.

You can add specific products to an asset by selecting the row in the table and then clicking the **New Product** above the "Assets For Selected Transport Unit" table.

You can edit an existing product by selecting the row in the table and then clicking the **Edit** button above the "Assets For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Product*.
- *Description*.
- *Quantity*.
- *Unit Weight*.
- *Height*.
- *Width*.
- *Length*.
- *Volume*.
- *Unit Factor*.

You can save the product by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing product by selecting the row in the table and then clicking the **Delete** button above the "Assets For Selected Transport Unit" table.

2.14 Finance section

This sections shows a summary of the revenue, cost and margin for the order.

2.15 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.

2.16 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 Order 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	
Load Location	Load Location	Load Location	TextBox	String	
Order Comment ID	Order Comment ID	Order Comment ID	TextBox	String	
Order Creation Date	Order Creation Date	Order Creation Date	TextBox	String	
Route		Route	Route	TextBox	String
Salesperson	Salesperson	Salesperson	TextBox	String	
Transport Unit Colour	Transport Unit Colour	Transport Unit Colour	DropDownList	Red,Blue,Green,Yellow	

2.17 Audit Trail section

Each time you make a change to any element of the data and save it, the system keep an audit trail of changes. The screen displays these in a table here. By default, the screen keeps this section closed.

The table displays:

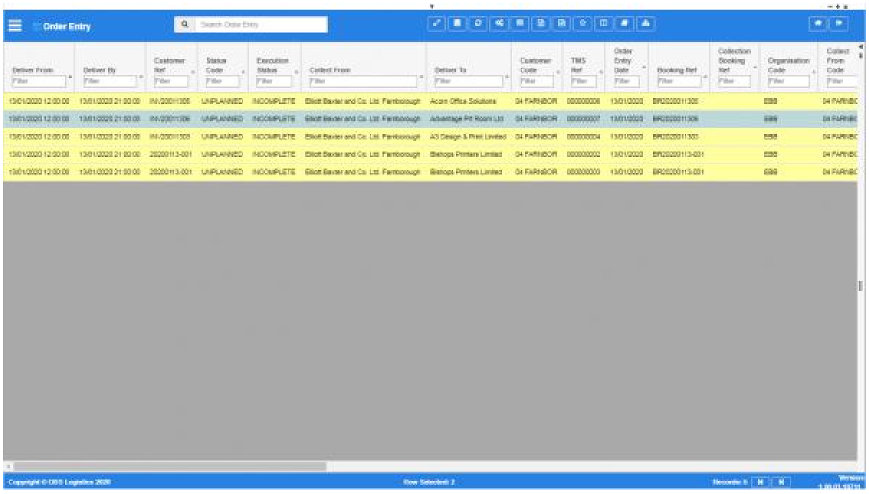
- *User* - the user ID that made the change.
- *Date* - the date and time that the change was made.
- *Description* - a detailed description of what was changed.

3 Orders

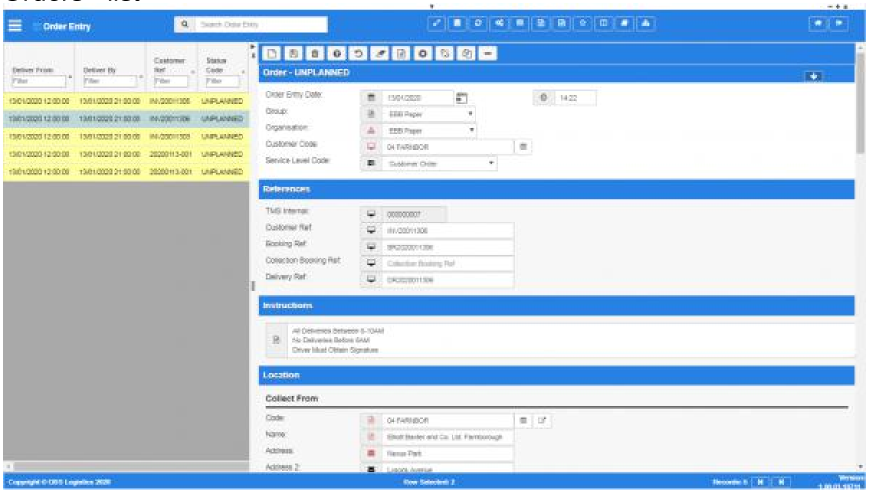
This screen allows you to enter orders.

The screen has a more complex query filter than normal, due to the amount of data available to be entered for orders.

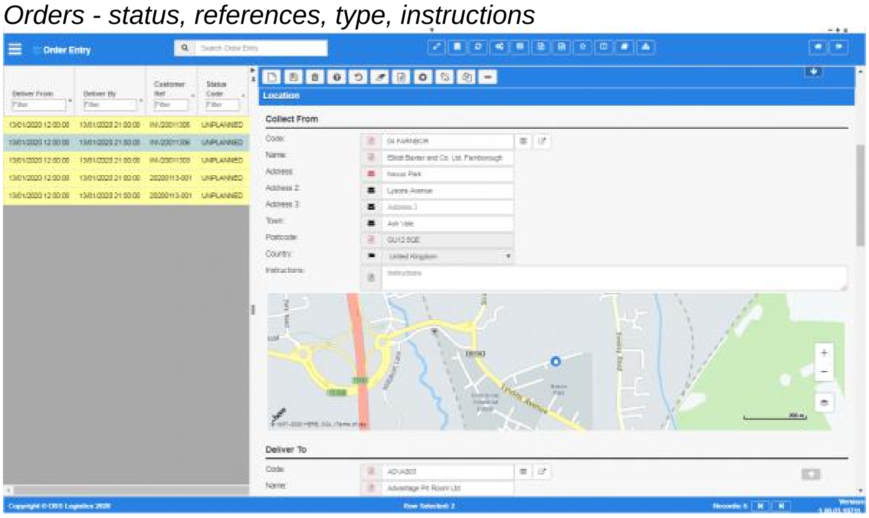
In this case, you select the field to be filtered from a drop-down list of all fields, then the operator, and then the value.

- 

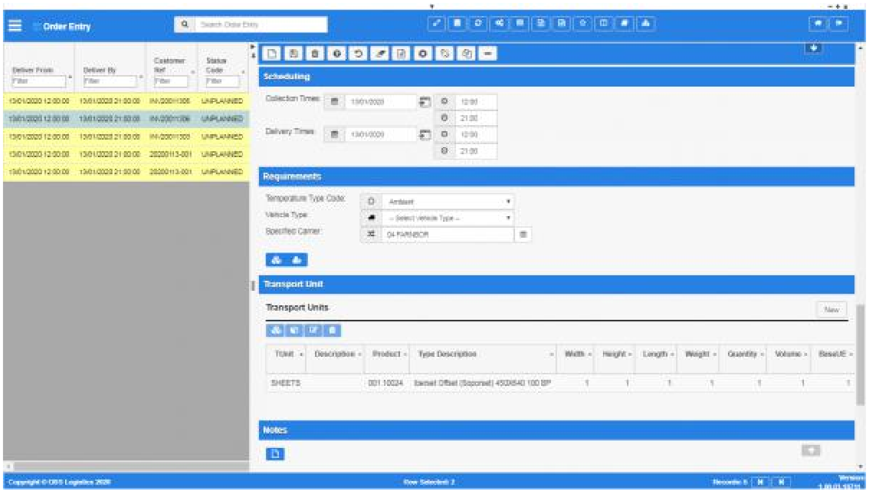
  Orders - list

- 

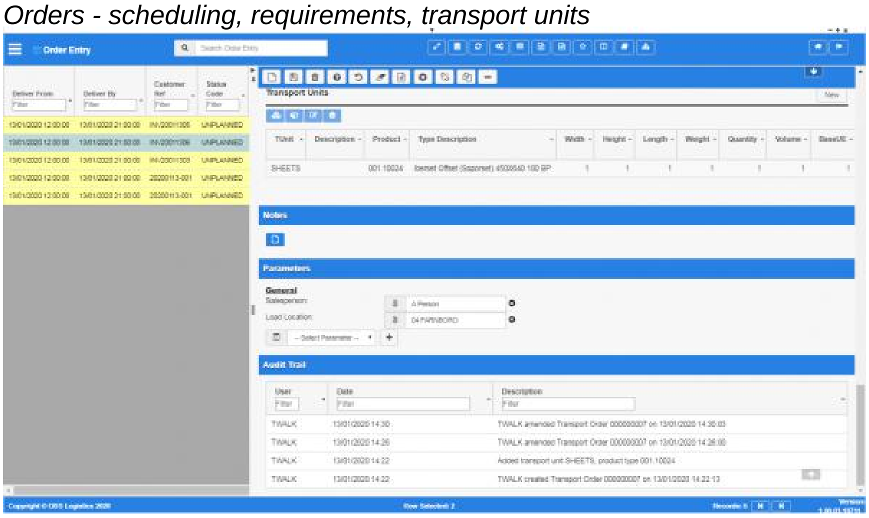
  Orders - status, references, type, instructions

- 

  Orders - locations

- 

Orders - scheduling, requirements, transport units

- 

Orders - parameters, audit

The list of fields are:

- *Deliver From*.
- *Deliver By*.
- *Customer Ref*.
- *Status Code*.
- *Execution Status*.
- *Collect From*.
- *Deliver To*.
- *Customer Code*.
- *TMS Ref*.
- *Order Entry Date*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Organisation Code*.
- *Collect From Code*.
- *Collect Address Line 1*.
- *Collect Address Line 2*.
- *Collect Address Line 3*.
- *Collect Town*.
- *Collect Country Code*.
- *Collect PostCode*.
- *Collect Postal Region*.
- *Deliver To Code*.
- *Deliver Address Line 1*.
- *Deliver Address Line 2*.
- *Deliver Address Line 3*.
- *Deliver Town*.

- *Deliver Country Code*.
- *Deliver PostCode*.
- *Deliver Postal Region*.
- *Collect From*.
- *Collect By*.
- *Owner Location Name*.
- *Owner Address Line 1*.
- *Owner Address Line 2*.
- *Owner Address Line 3*.
- *Owner PostCode*.
- *Owner Postal Region*.
- *Total Quantity*.
- *Total Volume (m³)*.
- *Total Weight (KG)*.
- *Total BaseUE*.
- *Revenue*.
- *Cost*.
- *Margin*.
- *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 operators are:

- *Is Equal To* - the orders' data must match your entered criteria exactly.
- *Is Not Equal To* - the orders' data must not match your entered criteria exactly.
- *Is Greater Than* - the orders' data must be greater, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Less Than* - the orders' data must be less than, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Greater or Equal To* - the orders' data must be greater than or exactly equal to, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is Less Than or Equal To* - the orders' data must be less than or exactly equal to, alphabetically or numerically, that your entered criteria. Note that symbols and a space are considered "less than" alphabetic or numeric data.
- *Is In* - the orders' data must be one of the values you listed in your criteria.
- *Is Not In* - the orders' data must be one of the values you listed in your criteria.
- *Is Like* - the orders' data must be similar to your entered criteria. Note that you must use a percentage symbol as a wildcard e.g. to find anything with the word "PLAN" anywhere, enter *%PLAN%*, but find only things that start with "PLAN", enter *PLAN%*.
- *Is Not Like* - the orders' data must be similar to your entered criteria. The percentage wildcard can also used here.

When you have entered your query criteria, you can run the query using the **Submit** button.

You can clear the criteria entered by clicking the **Reset** button. This will display the Results Table, as seen below.

The pop-up can be closed with the **Cancel** button or by closing the pop-up window.

You can choose to display data as follows:

- *Deliver From*.
- *Deliver By*.
- *Customer Ref*.
- *Status Code*.
- *Execution Status*.
- *Collect From*.
- *Deliver To*.
- *Customer Code*.

- *TMS Ref*.
- *Order Entry Date*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Organisation Code*.
- *Collect From Code*.
- *Collect Address Line 1*.
- *Collect Address Line 2*.
- *Collect Address Line 3*.
- *Collect Town*.
- *Collect Country Code*.
- *Collect PostCode*.
- *Collect Postal Region*.
- *Deliver To Code*.
- *Deliver Address Line 1*.
- *Deliver Address Line 2*.
- *Deliver Address Line 3*.
- *Deliver Town*.
- *Deliver Country Code*.
- *Deliver PostCode*.
- *Deliver Postal Region*.
- *Collect From*.
- *Collect By*.
- *Owner Location Name*.
- *Owner Address Line 1*.
- *Owner Address Line 2*.
- *Owner Address Line 3*.
- *Owner PostCode*.
- *Owner Postal Region*.
- *Total Quantity*.
- *Total Volume (m^3)*.
- *Total Weight (KG)*.
- *Total BaseUE*.
- *Revenue*.
- *Cost*.
- *Margin*.
- *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 results table will colour the rows based on the order status. You can control the colours of each order status displayed using the Order Status screen.

The screen has the following additional actions on the screen header:

- **Booking** - you can enter booking information once you have selected an order.
- **Consolidate** - you can choose to consolidate multiple orders together by selecting multiple orders and then clicking this button.

3.1 Consolidating Orders

You can select multiple orders by clicking when using the shift and/or control keys.

Note: The orders you select must be UNPLANNED and have the same delivery and collect locations.

Once you have selected multiple orders, you can click the **Consolidate** button in the screen header. The screen will display a pop-up window showing a summary of all of the orders.

You can confirm the consolidation by clicking the **Consolidate Records** button, or cancel the consolidation by closing the window.

3.2 Booking an Order

When you click this button, the screen will display a pop-up window to enter booking information.

You can enter the following:

- *Collect/Deliver* - a option to select whether the booking information applies to the collection or the delivery of the order.
- *Booking Ref* - a booking reference as provided to you.
- *Booking Date* - the date of the booking. You can enter the date directly or use the **Calendar** button provided.
- *Booking From* - the start time of the booking window.
- *Booking To* - the end time of the booking window.

You can save the booking information by clicking the **Book In** button, or cancel entry using the **Cancel** button or closing the pop-up window.

3.3 Adding or Editing an Order

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.
- **Template** - create an order from a template.
- **Cancel** - cancel an order.
- **Split** - Split an order.
- **Copy** - Copy an existing order.
- **Toggle** - toggle display of all accordion headers.

3.4 Order Template

You can create an order from a saved order template. You can create these in the Order Templates screen.

When you click this button, the screen will display a list of all order templates created in the system:

- *Organisation Code*.
- *Customer Code*.
- *Collect From Name*.
- *Deliver To Name*.

To create a new order, select the template from the list and click the **Submit** button. a new order will be created, with the fields populated from the template, ready for you to amend and save like normal. Note that all details are copied, including lines and items.

3.5 Cancel an Order

You can cancel an order by clicking the **Cancel** button. The order's status will be set to cancelled and the order re-displayed with this status.

3.6 Split an Order

You can split an order into multiple additional orders.

When you find the order you want to copy, click the **Split** button. The screen will display a list of all the order lines.

- *TUnit* - Transport Unit Code.
- *Product* - Product Type Code.
- *Type Description*.
- *Width*.
- *Height*.
- *Length*.
- *Weight*.
- *Quantity*.
- *Volume*.
- *BaseUE* - Base Unit Equivalent.
- *Haz*.
- *Stackable*.
- *Include* - a tick box to indicate that this order line is included in the split.

You can then indicate how many orders to split this into - the default is 2. You can split the order lines selected into new orders using the **Split** button, or cancel the split with the **Cancel** button or by closing the window.

3.7 Copy an Order

You can copy an existing order to create a new order.

When you find the order you want to copy, click the **Copy** button. This will create a copy of the order with a new reference, ready for you to amend and save like normal. Note that all details are copied, including lines and items.

3.8 Order section

The header will display the status of the order. This includes:

- The TMS reference number.
- The order status.
- The execution status.
- Totals:
    - Weight.
    - Volume.
    - BUE.

The section includes the following core order fields:

- *Order Entry Date* and time.
- *Group* - a drop-down list of all customer groups created in the system. You can maintain these in the Customer Groups screen.
- *Organisation* - a drop-down list of all organisations created in the system. You can maintain these in the Organisation screen.
- *Customer Code* - the customer code for the order. You can maintain these in the Customer screen. You can look up the available customer 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.
- *Service Level Code* - a drop-down list of the service levels for the order. You can maintain these in the Service Level screen.

3.9 References section

- *TMS Internal* - this is displayed for reference.
- *Customer Ref*.
- *Booking Ref*.
- *Collection Booking Ref*.
- *Delivery Ref*.

3.10 Instructions section

You can enter general order instructions for the execution of the order here.

3.11 Location section

You can enter the details of the order addresses here.

The section allows you to enter:

- *Collect From* - the address from which you will pick up the goods on the order.
- *Deliver To* - the address to which you will deliver the goods on the order.

Each address section allows you to enter the following information:

- *Code* - the location code. You can maintain locations in the Locations screen, or you can use the **View Details** button provided if you have entered a location, which will open a new tab showing the location information. You can enter a location code directly or use the **Lookup** button to the right of the value entry. The screen will display a pop-up window showing all locations configured in the system. You can select a location by clicking on the row or cancel entry by closing the window. You can refresh the order location details from the location code by pressing the **Refresh** button.
- *Name*.
- *Address*.
- *Address 2*.
- *Address 3*.
- *Town*.
- *Postcode*.
- *Country*.
- *Instructions* - specific instructions for execution when at this address.

The screen will display the location on a map beneath the address. As the address is entered or modified, the Latitude and Longitude of the address will be calculated and displayed.

When both addresses are entered, the screen will display the following information below the delivery address:

- *Distance (KM)*.
- *Expected Driving Time*.

3.12 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.

3.13 Scheduling section

- *Collection Times* - you can enter the collection window using the date and times provided. You can enter the date directly or use the **Calendar** button provided.
- *Delivery Times* - you can enter the collection window using the date and times provided. You can enter the date directly or use the **Calendar** button provided.

If the system has any schedule rules configured, the screen will use the organisation, service level and/or customer and zones of the from and to locations to find a compatible schedule rule. If one is found, the system will automatically default the collection and delivery windows for the order based on the rule.

3.14 Requirements section

- *Temperature Type Code* - a drop-down list of all temperature types configured in the system. You can maintain these in the Temperature Type screen.
- *Vehicle Type* - a drop-down list of all vehicle types configured in the system. You can maintain these in the Vehicle Types screen.
- *Specified Carrier* - the specific carrier that is required for this order. 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.

Here you can also indicate any special requirements that have been configured for orders in the system. You can configure Order Requirements in the Requirements screen.

The following are currently available:

- Ambient Temp only.
- Banksman.
- Dangerous.
- Detention.
- Abnormal Load Escort.
- Moffet.
- Extra Man Power.
- Installation at Delivery Location.
- Two Man Delivery.

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

3.15 Transport Unit section

You can enter the transport units, products or individual items transported on this order in this section.

You can add a quantity of transport units by clicking the **New** button in the section header.

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

Note that, when you select an existing transport unit, if there are any products or items to deliver, these will be shown in a number of tables below the transport units table:

- Products For Selected Transport Unit.
- Assets For Selected Transport Unit.
- Products For Selected Asset.

The screen will display a pop-up window to allow you to identify the following information:

- *Customer Order Reference* - an optional references against the ordered line.
- *Transport Unit Code* - a drop-down list of the transport unit types configured in the system. You can maintain these in the Transport Units screen.
- *Product Type* - The product type contained by the transport unit. You can maintain these in the Product Types screen. You can look up the available product types using the **Lookup** button under 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.
- *Description 1*.
- *Description 2*.
- *Pack Quantity* - the pack quantity of the product.
- *Quantity*.
- *Width* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Height* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Length* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Weight* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Volume* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *BaseUE* - defaulted from the transport unit type after you enter the quantity. You can change this here if required.
- *Hazardous* - a check box indicating whether this contacts hazardous product.
- *Stackable* - a check box indicating whether these transport units are stackable.

You can save the transport unit quantity by clicking the **Save** button or cancel entry by closing the window.

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

You can add specific products to a transport unit by selecting the row in the table and then clicking the **New Product** button in the section header.

You can edit an existing product by selecting the row in the table and then clicking the **Edit** button above the "Products For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Product*.
- *Description*.
- *Quantity*.
- *Unit Weight*.
- *Height*.
- *Width*.
- *Length*.
- *Volume*.

- *Unit Factor*.

You can save the product by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing product by selecting the row in the table and then clicking the **Delete** button above the "Products For Selected Transport Unit" table.

You can add specific assets/identified items to a transport unit by selecting the row in the table and then clicking the **New Asset** button in the section header.

You can edit an existing asset by selecting the row in the table and then clicking the **Edit** button above the "Assets For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Asset ID*.
- *Description*.
- *Reference*.

You can save the asset by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing asset by selecting the row in the table and then clicking the **Delete** button above the "Assets For Selected Transport Unit" table.

You can add specific products to an asset by selecting the row in the table and then clicking the **New Product** above the "Assets For Selected Transport Unit" table.

You can edit an existing product by selecting the row in the table and then clicking the **Edit** button above the "Assets For Selected Transport Unit" table.

The screen will display a pop-up window to allow you to identify the following information:

- *Product*.
- *Description*.
- *Quantity*.
- *Unit Weight*.
- *Height*.
- *Width*.
- *Length*.
- *Volume*.
- *Unit Factor*.

You can save the product by clicking the **Save** button or cancel entry by closing the window.

You can delete an existing product by selecting the row in the table and then clicking the **Delete** button above the "Assets For Selected Transport Unit" table.

3.16 Finance section

This sections shows a summary of the revenue, cost and margin for the order. This section also allows you to maintain additional order charges associated to the order, which will generate revenue to the order.

You can add an order charge by clicking the **New** button in the section header.

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

The screen will display a pop-up window to allow you to identify the following information:

- *Description* - the description of the charge or service.
- *Quantity* - the quantity of this chargeable item or service.

- *Price* - the price of this chargeable item or service.
- *Value* - the screen calculates this from the quantity and price.

You can save the charge quantity by clicking the **Save** button or cancel entry by closing the window.

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

3.17 Trips section

If this order is planned onto any trips, the screen will display the trips onto which it has been planned here.

The screen will display:

- *Trip Ref* - the trip reference.
- *Trip Name* - the trip name. This may also be the route code, if the trip was generated from a fixed route template.
- *Trunk Trip* - a check-box, indicating whether the trip is a trunk trip.
- *Trip Status* - the trip status.
- *Trip Start* - the location at which the trip starts.
- *Load* - the location at which the order is loaded.
- *Unload* - the location at which the order is unloaded.

3.18 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.

3.19 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 Order 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	
Load Location	Load Location	Load Location	TextBox	String	
Order Comment ID	Order Comment ID	Order Comment ID	TextBox	String	
Order Creation Date	Order Creation Date	Order Creation Date	TextBox	String	
Route		Route	Route	TextBox	String
Salesperson	Salesperson	Salesperson	TextBox	String	
Transport Unit Colour	Transport Unit Colour	Transport Unit Colour	DropDownList	Red,Blue,Green,Yellow	

3.20 Audit Trail section

Each time you make a change to any element of the data and save it, the system keep an audit trail of changes. The screen displays these in a table here. By default, the screen keeps this section closed.

The table displays:

- *User* - the user ID that made the change.
- *Date* - the date and time that the change was made.
- *Description* - a detailed description of what was changed.