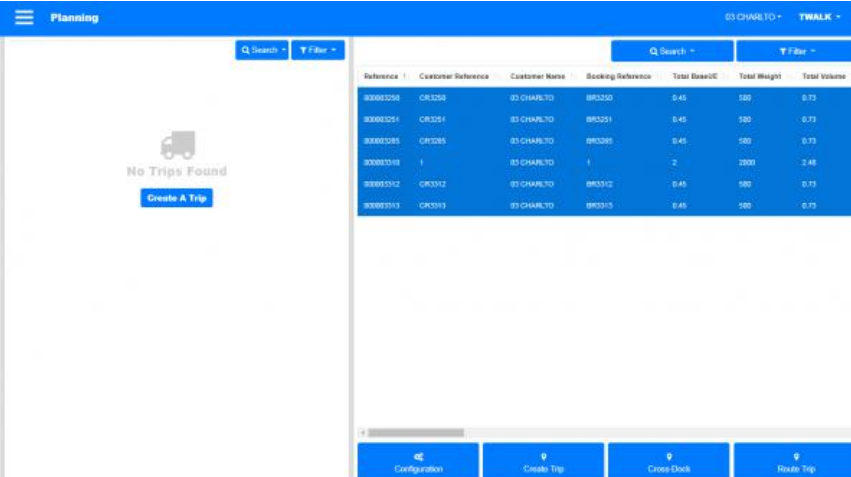


Warning: This is an incomplete guide.

Warning: Still to be added:

- Configuration in general
 - ♦ Order well column configuration
 - ♦ Trip card configuration
- Order well columns
- Order well instructions column - can expand
- Double-click order - open new tab showing the order.

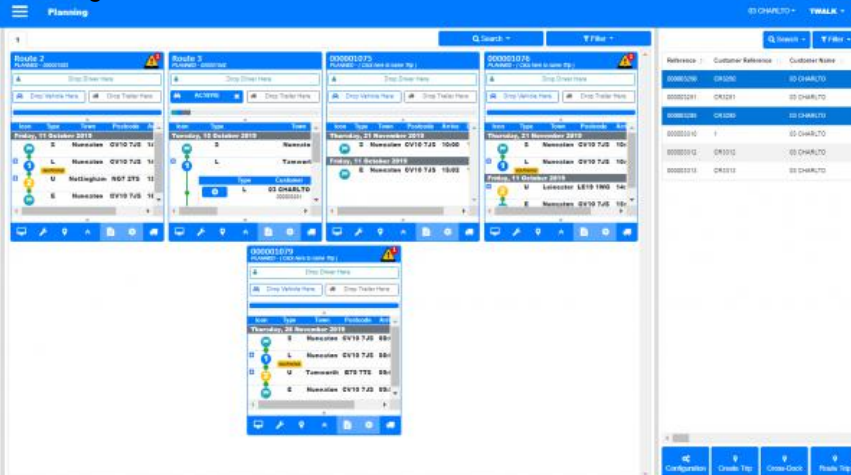
Planning

- 

The screenshot shows the 'Planning' interface. On the left, a 'No Trips Found' message is displayed with a 'Create A Trip' button. On the right, a table lists trip data with columns: Reference, Customer Reference, Customer Name, Booking Reference, Total Board/C, Total Weight, and Total Volume. The table contains several rows of data for customer 'B3 CHARLTON'.

Reference	Customer Reference	Customer Name	Booking Reference	Total Board/C	Total Weight	Total Volume
000000000	CR0000	B3 CHARLTON	BR0000	0.45	100	0.75
000000001	CR0001	B3 CHARLTON	BR0001	0.45	100	0.75
000000002	CR0002	B3 CHARLTON	BR0002	0.45	100	0.75
000000003	CR0003	B3 CHARLTON	BR0003	2	2000	2.48
000000004	CR0004	B3 CHARLTON	BR0004	0.45	100	0.75
000000005	CR0005	B3 CHARLTON	BR0005	0.45	100	0.75

Planning order well

- 

The screenshot shows the 'Planning' interface with multiple trip cards displayed on the left. Each card shows a route map and trip details. On the right, a table lists trip data with columns: Reference, Customer Reference, Customer Name, Booking Reference, Total Board/C, Total Weight, and Total Volume. The table contains several rows of data for customer 'B3 CHARLTON'.

Reference	Customer Reference	Customer Name	Booking Reference	Total Board/C	Total Weight	Total Volume
000000006	CR0006	B3 CHARLTON	BR0006	0.45	100	0.75
000000007	CR0007	B3 CHARLTON	BR0007	0.45	100	0.75
000000008	CR0008	B3 CHARLTON	BR0008	0.45	100	0.75
000000009	CR0009	B3 CHARLTON	BR0009	2	2000	2.48
000000010	CR0010	B3 CHARLTON	BR0010	0.45	100	0.75
000000011	CR0011	B3 CHARLTON	BR0011	0.45	100	0.75

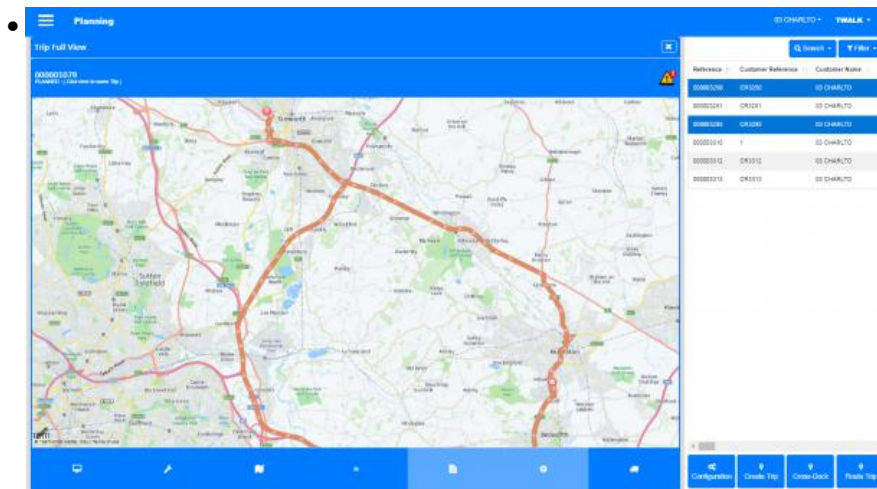
Planning onto existing trips

- 

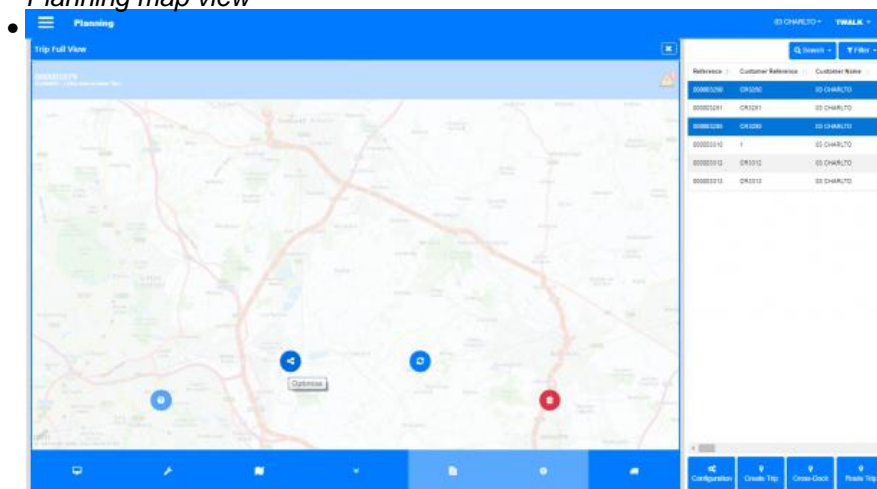
The screenshot shows the 'Planning' interface with a detailed trip card displayed on the left. The card shows a route map and trip details. On the right, a table lists trip data with columns: Reference, Customer Reference, Customer Name, Booking Reference, Total Board/C, Total Weight, and Total Volume. The table contains several rows of data for customer 'B3 CHARLTON'.

Reference	Customer Reference	Customer Name	Booking Reference	Total Board/C	Total Weight	Total Volume
000000012	CR0012	B3 CHARLTON	BR0012	0.45	100	0.75
000000013	CR0013	B3 CHARLTON	BR0013	0.45	100	0.75
000000014	CR0014	B3 CHARLTON	BR0014	0.45	100	0.75
000000015	CR0015	B3 CHARLTON	BR0015	2	2000	2.48
000000016	CR0016	B3 CHARLTON	BR0016	0.45	100	0.75
000000017	CR0017	B3 CHARLTON	BR0017	0.45	100	0.75

Full-screen with expanded details and warnings



Planning map view



Optimisations

Resourcing



Resourcing drivers

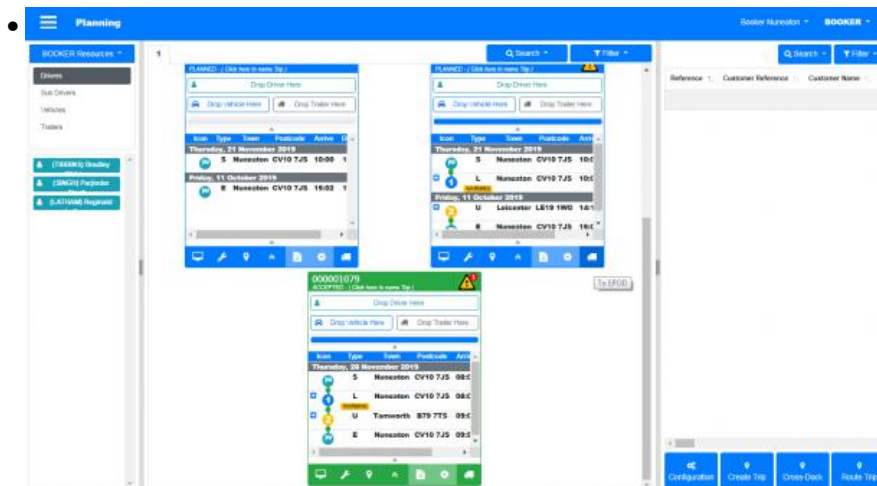


Resourcing vehicles



Resourcing trailers

Execution



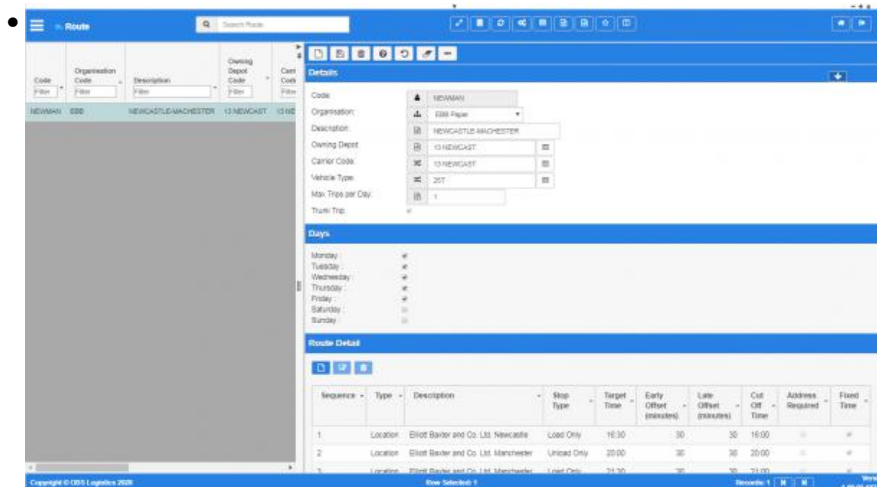
Send trips to C-ePOD

Contents

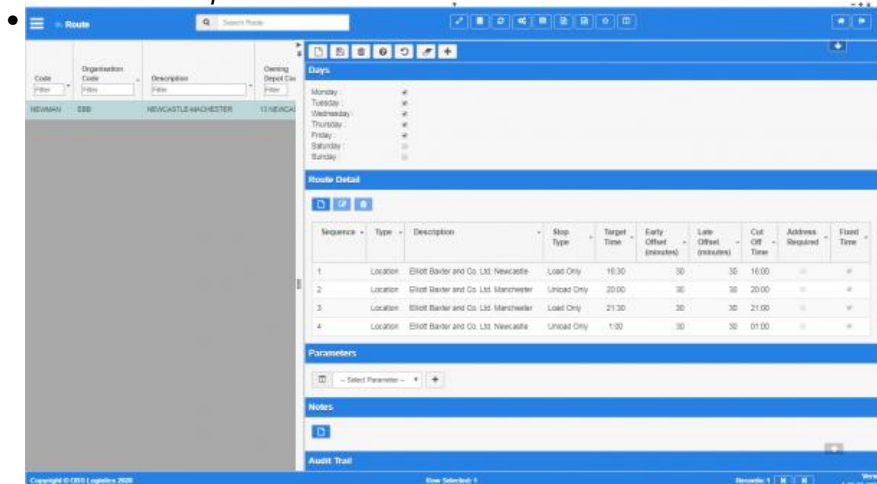
- 1 Routes.....1**
 - 1.1 Details section.....2
 - 1.2 Days section.....2
 - 1.3 Route Detail section.....2
 - 1.4 Parameters section.....3
 - 1.5 Notes section.....3
 - 1.6 Audit Trail section.....3
- 2 Schedule Rules.....4**
 - 2.1 Details section.....5
- 3 Trip Debrief.....6**
 - 3.1 Query section.....7
 - 3.2 Results.....7
 - 3.3 Details section.....7
- 4 Trip Status.....11**

1 Routes

This screen allows you to maintain the fixed route templates used when automatically planning orders onto trips.



Fixed route templates



Fixed route stops








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

- **Code.**
- **Organisation Code.**
- **Description.**
- **Owing Depot Code.**
- **Carrier Code.**
- **Vehicle Type Code.**
- **Max Trips per Day.**
- **Monday.**
- **Tuesday.**
- **Wednesday.**
- **Thursday.**
- **Friday.**
- **Saturday.**
- **Sunday.**
- **Trunk Trip.**
- **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.

1.1 Details section


You can change or add the following:


- *Code* - the route code.
- *Organisation* - a drop-down list of all organisations in the system.
- *Description* - the route description.
- *Owning Depot* - the depot that owns the trips created from this route template. You can maintain these in the **Locations** screen. You can look up the available depot 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.
- *Carrier Code* - the default carrier of trips created from this route 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.
- *Vehicle Type* - The default vehicle type of trips created from this route template, used for capacity restrictions. You can maintain these in the **Vehicle Types** screen. You can look up the available vehicle types 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.
- *Max Trips per Day* - the maximum number of trips that can be created from this fixed route template per day.
- *Trunk Trip* - a check box to indicate that trips created from this template are considered trunk trips.

1.2 Days section


Here, you can click the provided check boxes to indicate which days of the week the route may run.

1.3 Route Detail section

You can enter each stop and the matching parameters for that stop by clicking the  **New** button in the section.

You can edit route stop by selecting the row in the table and then clicking the  **Edit** button in the section header.


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

- *Sequence.*
- *Type* - a drop-down list of: Location; Zone; Depot. Use this to select the stop type
- *Stop*, one of *Location Code*, *Zone Code* or *Depot* - you can select the details of the stop based on the stop type selected above. The screen provides a  **Lookup** button to allow you to select the individual stop.



- *Stop Type* - the activity at this stop. The screen provides a drop-down list of the following selections: Both; Load Only; Unload Only.
- *Target Time*.
- *Max. Loading Time (minutes)*.
- *Early Offset (minutes)*.
- *Late Offset (minutes)*.
- *Cut Off Time*.

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

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

1.4 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.

1.5 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.

1.6 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:

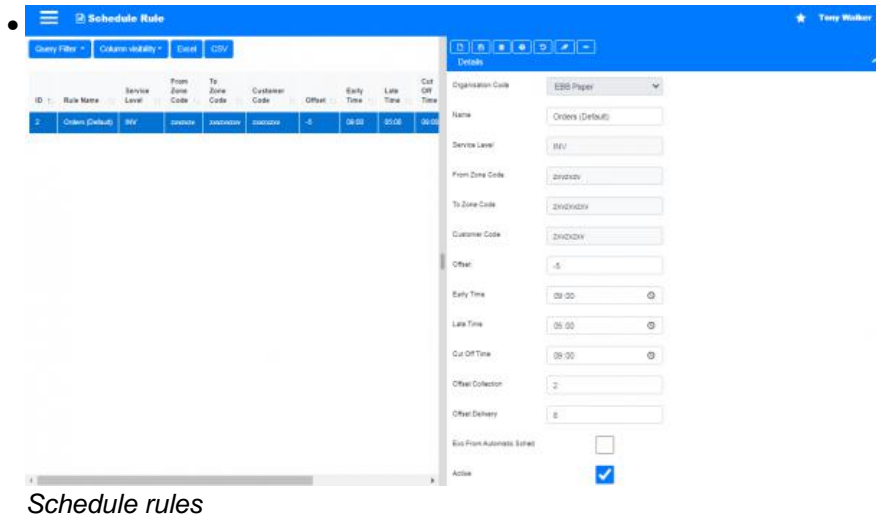
- *User* - the user ID that made the change.
- *Date* - the date and time that the change was made.
- *Description* - a detailed description of what was changed.



2 Schedule Rules

 **Warning:** This is an incomplete guide.

This screen allows you to maintain the schedule rules. The system uses these rules to default collection and delivery windows on orders that match them, and also to indicate whether orders that match these rules should be automatically planned.



Schedule Rule

Query Filter | Columns visibility | Detail | CSV

ID	Rule Name	Service Level	From Zone Code	To Zone Code	Customer Code	Offset	Early Time	Late Time	Cut Off Time
1	Orders (Default)	REV	000000	000000	000000	-5	08:00	05:00	08:00

Details

Organization Code: EBS Paper

Name: Orders (Default)

Service Level: REV

From Zone Code: 000000

To Zone Code: 000000

Customer Code: 000000

Offset: -5

Early Time: 08:00

Late Time: 05:00

Cut Off Time: 08:00

Offset Collection: 2

Offset Delivery: 8

Exc From Automatic Sched: ☐








Active: ☒

Schedule rules

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

- *ID.*
- *Rule Name.*
- *Service Level.*
- *From Zone Code.*
- *To Zone Code.*
- *Customer Code.*
- *Offset.*
- *Early Time.*
- *Late Time.*
- *Cut Off Time.*
- *Offset Collection.*
- *Offset Delivery.*
- *Exc from Automatic Sched.*
- *Active Records Only.*

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.



2.1 Details section

You can change or add the following:

- *Organisation.*
- *Name.*
- *Service Level.*
- *From Zone Code.*
- *To Zone Code.*
- *Customer Code.*
- *Offset.*
- *Early Time.*
- *Late Time.*
- *Cut Off Time.*
- *Offset Collection.*
- *Offset Delivery.*
- *Exc from Automatic Sched.*
- *Active.*



3 Trip Debrief

You can use the debrief screen to find trips and enter 'actual' details of the execution of the trip. This includes:

- Trip-level debrief information, like overall start and end ODO readings from the vehicle, general comments, etc.
- Trip Stop-level debrief information, like the arrival and departure times from each stop on the trip.
- Order-level debrief information, for each activity (like loading or unloading) against each stop on the trip, for example actual quantities and weights against order lines and items.
- Changing the trip status, for example to show that the trip is now completed.

Trip Debriefing: 03 CHARLTO

Query Filter +

Trip Reference	Status	Planned From	Planned To	Driver	Vehicle	Org
00000065	COMPLETED	19/07/2019	02/08/2019	Bradley Tibbels	AC181BE	
00000066	COMPLETED	27/07/2019	27/07/2019	Bradley Tibbels	AC181BE	
00001903	COMPLETED	23/09/2019	25/09/2019	Bradley Tibbels	QWETHSV	
00001906	ACCEPTED	23/09/2019	25/09/2019	Bradley Tibbels	AC181BE	
00001918	ACCEPTED	26/09/2019	06/10/2019	Bradley Tibbels	AC181BE	
00001920	COMPLETED	26/09/2019	06/10/2019	Bradley Tibbels	QWETHSV	
00001921	COMPLETED	02/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001922	ACCEPTED	02/09/2019	16/09/2019	Bradley Tibbels	QWETHSV	
00001928	ACCEPTED	11/08/2019	11/08/2019	Bradley Tibbels	AC181BE	
00001928	COMPLETED	16/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001954	ACCEPTED	15/11/2019	15/11/2019			
00001962	ACCEPTED	19/11/2019	19/11/2019			
00001963	ACCEPTED	29/07/2019	29/07/2019			

Showing 1 to 14 of 14 entries

SUMMARY

Start Date/Time: DDMM/YYYY HH:MM End Date/Time: DDMM/YYYY HH:MM
 Planned: 29/09/2019 04:00 29/09/2019 07:30
 Driver: Vehicle: Trailer:
 ODO Start: ODO End: Mileage:
 Fuel Drawn: Fuel Used: Fuel Receipt Ref:
 Overall Summary Comments:
 Complete Summary Review +

ROUTE STOPS

1 STOPS: Morris Stone, Spenwood Road, Newcastle Under Lyme, ST5 7DU

Debrief - Trip level

Trip Debriefing: 03 CHARLTO

Query Filter +

Trip Reference	Status	Planned From	Planned To	Driver	Vehicle	Org
00000065	COMPLETED	19/07/2019	02/08/2019	Bradley Tibbels	AC181BE	
00000066	COMPLETED	27/07/2019	27/07/2019	Bradley Tibbels	AC181BE	
00001903	COMPLETED	23/09/2019	25/09/2019	Bradley Tibbels	QWETHSV	
00001906	ACCEPTED	23/09/2019	25/09/2019	Bradley Tibbels	AC181BE	
00001918	ACCEPTED	26/09/2019	06/10/2019	Bradley Tibbels	AC181BE	
00001920	COMPLETED	26/09/2019	06/10/2019	Bradley Tibbels	QWETHSV	
00001921	COMPLETED	02/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001922	ACCEPTED	02/09/2019	16/09/2019	Bradley Tibbels	QWETHSV	
00001928	ACCEPTED	11/08/2019	11/08/2019	Bradley Tibbels	AC181BE	
00001928	COMPLETED	16/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001954	ACCEPTED	15/11/2019	15/11/2019			
00001962	ACCEPTED	19/11/2019	19/11/2019			
00001963	ACCEPTED	29/07/2019	29/07/2019			

Showing 1 to 14 of 14 entries

ROUTE STOPS

1 STOPS: Morris Stone, Spenwood Road, Newcastle Under Lyme, ST5 7DU

Arrived: 29/09/2019 8:00 Departed: 29/09/2019 8:05
 Planned: 29/09/2019 04:00 29/09/2019 07:30
 Driver: Bradley Tibbels Vehicle: Trailer:
 Temperature: Weightbridge Ref: Weightbridge Weight:
 Stop Comments: Non-Fulfilled Reason:
 Stop Reviewed +

TMS Order: 00003153 Booker | Collected From: STOKS | Deliver To: TAILWORTH

Service Level: Activity: Order Status:
 Delivery Stock: LOAD Part delivered:
 Customer: BOOKER Booking Ref: Collection Ref:
 Order Proof of Collection Comments: Non-Fulfilled Reason:
 Transport Units

Debrief - Stop and Order level

Trip Debriefing: 03 CHARLTO

Query Filter +

Trip Reference	Status	Planned From	Planned To	Driver	Vehicle	Org
00000065	COMPLETED	19/07/2019	02/08/2019	Bradley Tibbels	AC181BE	
00000066	COMPLETED	27/07/2019	27/07/2019	Bradley Tibbels	AC181BE	
00001903	COMPLETED	23/09/2019	25/09/2019	Bradley Tibbels	QWETHSV	
00001906	ACCEPTED	23/09/2019	25/09/2019	Bradley Tibbels	AC181BE	
00001918	ACCEPTED	26/09/2019	06/10/2019	Bradley Tibbels	AC181BE	
00001920	COMPLETED	26/09/2019	06/10/2019	Bradley Tibbels	QWETHSV	
00001921	COMPLETED	02/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001922	ACCEPTED	02/09/2019	16/09/2019	Bradley Tibbels	QWETHSV	
00001928	ACCEPTED	11/08/2019	11/08/2019	Bradley Tibbels	AC181BE	
00001928	COMPLETED	16/09/2019	16/09/2019	Parjinder Singh	AC181BE	
00001954	ACCEPTED	15/11/2019	15/11/2019			
00001962	ACCEPTED	19/11/2019	19/11/2019			
00001963	ACCEPTED	29/07/2019	29/07/2019			

Showing 1 to 14 of 14 entries

Transport Units

P1 - CAGE-C (Cage, Cage)
 Quantity: Weight: Volume: BU:
 Planned: 100 Planned: 300 Planned: 0.75 Planned: 0.45
 Unit Comments: Non-Fulfilled Reason:
 Products:
 QWETHSV (QWETHSV A)
 Quantity: Height: Length: Weight: Volume:
 Planned: 100 Planned: 100 Planned: 100 Planned: 100 Planned: 100
 Product Comments: Non-Fulfilled Reason:
 QWETHSV (QWETHSV B)
 Quantity: Height: Length: Weight: Volume:
 Planned: 100 Planned: 100 Planned: 100 Planned: 100 Planned: 100
 Product Comments: Non-Fulfilled Reason:
 P2 - CAGE-C 2 (Cage, Cage)
 Quantity: Weight: Volume: BU:
 Planned: 100 Planned: 300 Planned: 0.75 Planned: 0.45
 Unit Comments: Non-Fulfilled Reason:

Debrief - Order Line level



The system supports automatic debrief from external systems. For example, if CTL is integrated with *CALIDUS* ePOD, completion of the trips there will automatically enter the information in this screen for you. In this case, you can use the debrief screen to review or change what has automatically been entered.

3.1 Query section

You can access the query through the **Query Filter** button.

Query criteria:

- *Trip Ref.*
- *Order Ref.*
- *Customer Ref.*
- *Customer.*
- *Booking Ref.*
- *Owning Depot.*
- *Planned Date.*
 - ♦ *Planned Date From* - defaults to 7 days in the past. You can enter a date directly, use the up/down buttons to move forward/back a day, or use the calendar to select a date.
 - ♦ *Planned Date To* - defaults to 7 days in the past. You can enter a date directly, use the up/down buttons to move forward/back a day, or use the calendar to select a date.
- *Carrier.*

You can execute the query with the **Apply Filters** button, or close the query section with the **Query Filter** button.

3.2 Results

The screen shows a results table with the following information:

- *Trip Reference.*
- *Status.*
- *Planned From.*
- *Planned To.*
- *Location.*
- *Driver.*
- *Vehicle.*
- *Organisation.*
- *Depot.*
- *Route.*
- *Carrier.*
- *Vehicle.*
- *Make.*
- *Model.*
- *Type.*
- *Distance.*

You can debrief the trip or see details of the trip by clicking the row - the screen will display the details section.

3.3 Details section


The details section allows you to debrief the trip at all levels, and therefore displays sub-sections for:

- Trip-level.
- Stop-level, one for each stop.
- Order-level, within each stop, one for each order planned at that stop. This includes order line and item information.



The screen has the following buttons available on the header bar:

- **Close.**
- **Save** - save any changes that you have made.
- **Refresh** - refresh the trip detail panel.
- Display options, to change or maximise the space used by the detail section:
 - ◆ **Max width.**
 - ◆ **Half-width.**
 - ◆ **Min width.**

 **Note:** When you are making changes to a trip and you attempt to close, refresh or choose another trip without saving, you will be prompted to save your changes first.

3.3.1 Trip sub-section

The header bar displays the following information:

- *TRIP* - the trip ID.
- *ORG* - the organisation.
- *Trip Status*

The details show:

- *Depot.*
- *Carrier.*
- *Route.*

You can set the trip to status Complete by clicking the **SET COMPLETE** button.

3.3.2 Summary sub-section

This is where the trip-level debrief information can be entered, consisting of:

- *Driver* - you can select the driver of the vehicle from a drop-down list of all drivers in the system.
- *Start Date/Time* - you can default the date/time to the planned date/time (shown below) with the button provided.
- *End Date/Time* - you can default the date/time to the planned date/time (shown below) with the button provided.
- *Vehicle* - you can select the vehicle from a drop-down list of all vehicles in the system.
- *Trailer* - you can select the trailer from a drop-down list of all trailers in the system.
- *ODO Start.*
- *ODO End.*
- *Mileage* - you can default the mileage to the planned mileage (shown below) with the button provided.
- *Fuel Drawn.*
- *Fuel Used.*
- *Fuel Receipt Ref.*
- *Overall Summary Comments.*

You can enter all the summary details with the **Complete Summary Review** button

3.3.3 Stop sub-section

The screen displays each of the stops on the trip in sequence. These stop sections are closed by default - you can click them to show all of the stop details and the orders on that stop.

The sub-section header displays the following information:

- *Stop sequence.*



- *Location.*
- *Location Address.*

The details that you can change are:

- *Driver* - you can select the driver of the vehicle from a drop-down list of all drivers in the system.
- *Arrived* - you can default the date/time to the planned date/time (shown below) with the button provided.
- *Departed* - you can default the date/time to the planned date/time (shown below) with the button provided.
- *Vehicle* - you can select the vehicle from a drop-down list of all vehicles in the system.
- *Trailer* - you can select the trailer from a drop-down list of all trailers in the system.
- *Trailer Type* - you can select the trailer type from a drop-down list of all trailer types in the system.
- *Turnaround Time.*
- *Distance from Last Stop.*
- *Temperature.*
- *Weighbridge Ref.*
- *Weighbridge Weight.*
- *Stop Comments.*
- *Non-fulfilled Reason.*

You can confirm the stop has been completed using the **Confirm Fulfilled** button.

You can enter all the stop details with the **Complete Stop Review** button

Under each stop, the screen lists the orders at that stop:

The header displays the following information:

- *TMS Order.*
- *Customer.*
- *Customer Ref.*
- *Collect From.*
- *Deliver To.*

The details that you can change are:

- *Service Level.*
- *Activity.*
- *Order Status.*
- *Customer.*
- *Booking Ref..*
- *Collection Ref..*
- *Order Proof of Collection - Date/Time.*
- *Order Proof of Collection Comments.*
- *Non-fulfilled Reason* - you can select the non-fulfilled reason from a drop-down list of all reasons in the system.

You can confirm the order has been completed using the **Confirm Fulfilled** button.

Under each order, the screen lists all transport units for that order.

The header displays the following information:

- *Number.*
- *TU type.*
- *Descriptions.*

The details that you can change are:

- *Quantity* - you can default the value to the planned value (shown below) with the button provided.
- *Weight* - you can default the value to the planned value (shown below) with the button provided.
- *Volume* - you can default the value to the planned value (shown below) with the button provided.
- *BUE* - you can default the value to the planned value (shown below) with the button provided.
- *Unit Comments.*
- *Non-fulfilled Reason* - you can select the non-fulfilled reason from a drop-down list of all reasons in the system.



You can confirm the transport unit has been completed using the **Confirm Fulfilled** button.

Under each transport unit, the screen lists all products for that transport unit.

The header displays the following information:

- *Description.*

The details that you can change are:

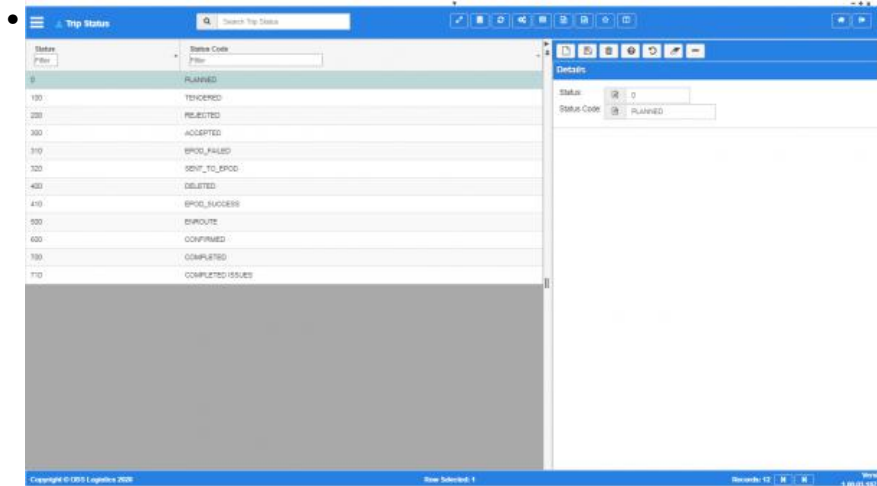
- *Quantity* - you can default the value to the planned value (shown below) with the button provided.
- *Height* - you can default the value to the planned value (shown below) with the button provided.
- *Length* - you can default the value to the planned value (shown below) with the button provided.
- *Weight* - you can default the value to the planned value (shown below) with the button provided.
- *Volume* - you can default the value to the planned value (shown below) with the button provided.
- *Product Comments*
- *Non-fulfilled Reason* - you can select the non-fulfilled reason from a drop-down list of all reasons in the system.



4 Trip Status

This screen allows you to maintain the trip statuses in the system.

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



Trip status maintenance

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

- *Status* - the status code.
- *Status Code* - 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:

- *Status* - the status code.
- *Status Code* - the name.

