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.

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1 Template:AddressesSection

1.1 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.

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2 Template:AuditTrailSection

2.1 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.

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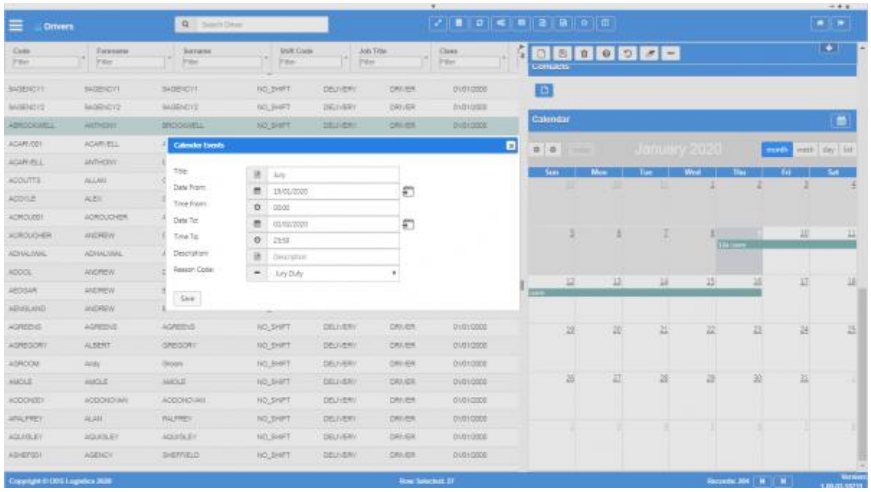
3 Template:CalendarSection

3.1 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.

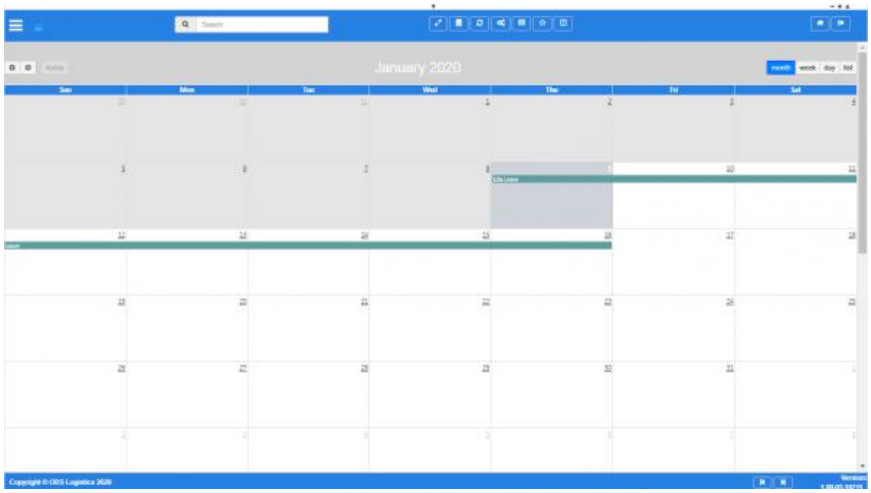
You can save a new event with the **Save** button.

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

You can entering or updating 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

4 Template:CarriersSection

4.1 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.

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5 Template:ContactsSection

5.1 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 Template:LocationZoneSection

6.1 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.

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7 Template:NotesSection

7.1 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.

8 Template:OperatingLocationSection

8.1 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.

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9 Template:Parameters

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.

10 Template:ParametersSection

10.1 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.

11 Template:ProductTypeSection

11.1 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.

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12 Template:ServiceLevelSection

12.1 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.

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13 Template:TransportUnitSection

13.1 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.

14 Template:VehicleTypeSection

14.1 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.