Customer Service

Aptean Ltd

Contents

1 Customer Service

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.

1.1 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.

1.2 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.

1.2.1 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.

1.2.2 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".

1.2.3 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.

1.2.4 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*.

1.2.5 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*.

1.3 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.