Order Templates

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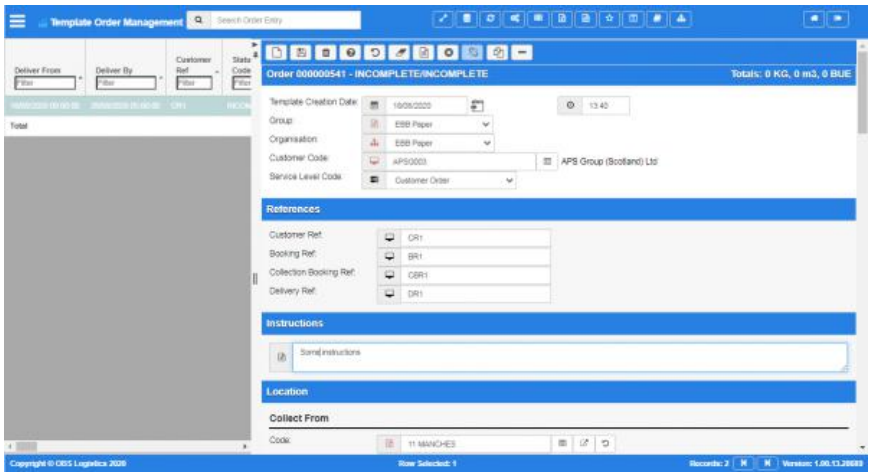
Contents

1 Order Templates 1
1.1 Consolidating Order Templates 3
1.2 Adding or Editing an Order Template 4
1.3 Order Template 4
1.4 Split an Order Template 4
1.5 Copy an Order Template 5
1.6 Order section 5
1.7 References section 5
1.8 Instructions section 5
1.9 Location section 5
1.10 Contacts section 6
1.11 Scheduling section 7
1.12 Requirements section 7
1.13 Transport Unit section 7
1.14 Finance section 9
1.15 Notes section 9
1.16 Parameters section 9
1.17 Audit Trail section 10

1 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*.

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- *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 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.

1.1 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.

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

1.2 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.

1.3 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.

1.4 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.

1.5 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.

1.6 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.

1.7 References section

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

1.8 Instructions section

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

1.9 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*.

1.10 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.

1.11 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.

1.12 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.

1.13 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.

1.14 Finance section

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

1.15 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.

1.16 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	

1.17 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.

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