Aptean

Administration - Messaging

Calidus TMS - 12.45

17th October 2014 - 1.0
Reference: ADMINISTRATION
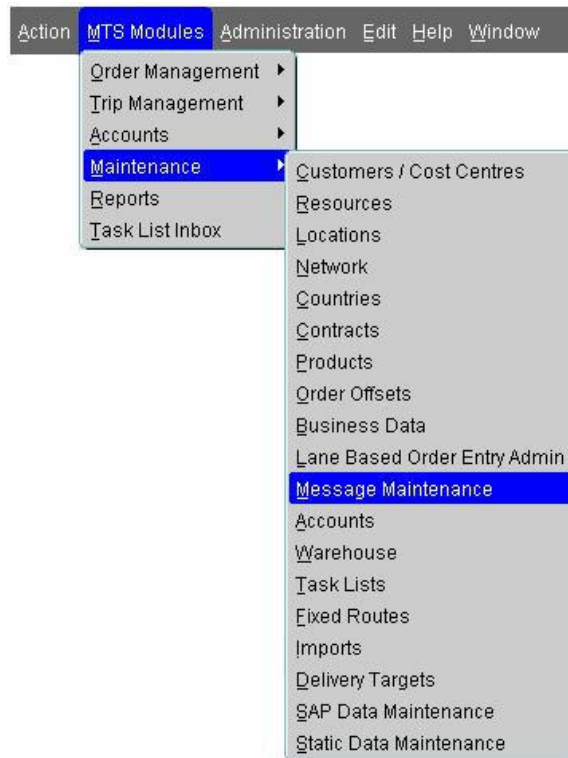
Contents

1 Message Maintenance

1.1 Message Maintenance

Message Maintenance can be located in the Maintenance Menu as shown below:

When a trip is planned, carriers and Locations can receive automatic e-mail/fax tenders. This form is used to set up specific recipients for these automatic emails, when a message is sent to a Carrier or Location.

To enable a carrier to receive messages, a recipient will have to be set up for it. This can be done by selecting the 'Carrier' radio button and clicking 'New'. Select the carrier you want to enable messaging for from the lookup form and select OK. This will appear in the left pane under 'Recipient Type'. A medium type, email address and type of email request need to be set up in the right pane. This can be done by selecting 'New' in the right pane for the location you have just set up.

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First select the type of Message Medium:
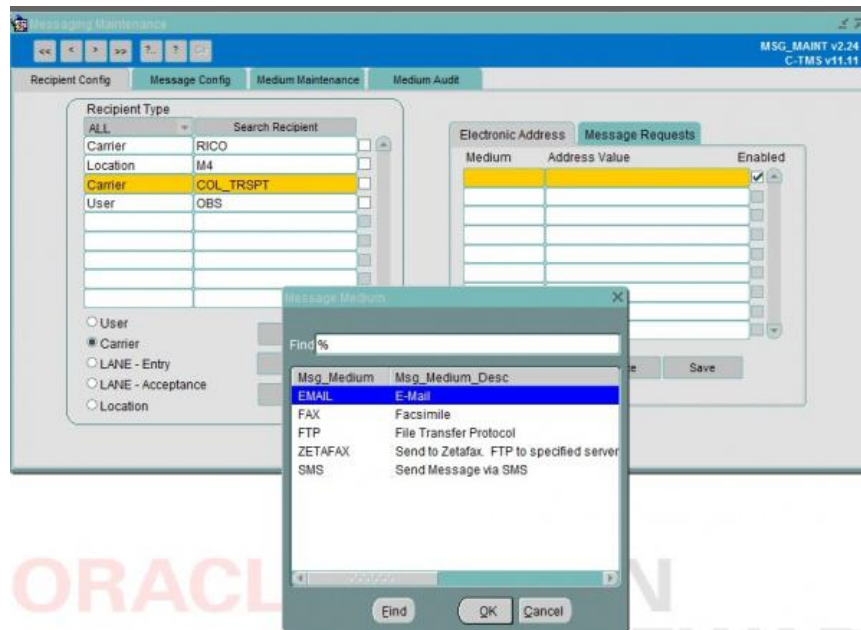
Next configure the email address of the recipient at the Carrier. (email address in example is for demonstration purposes only). Repeat same process if there is to be more than 1 recipient:
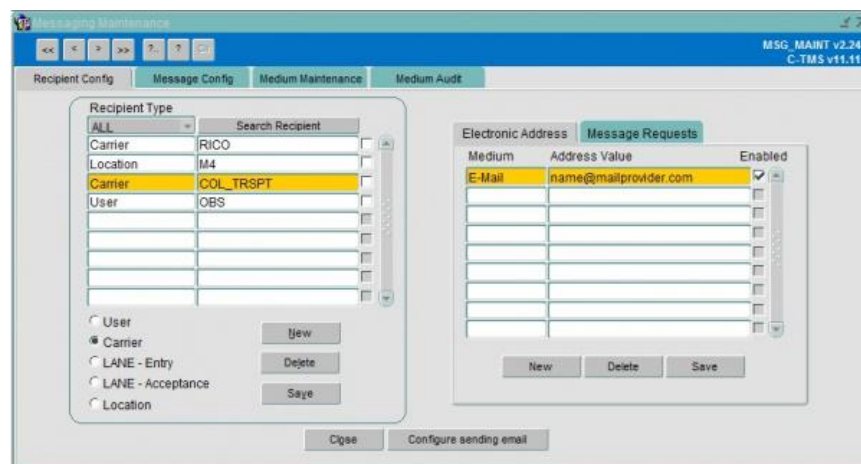
The final part is to set up the type of messages you want the recipient at the location to receive. To do this click the 'Message Requests' tab and then 'New'. A pop-up of different message requests configured for locations will be shown, as below:

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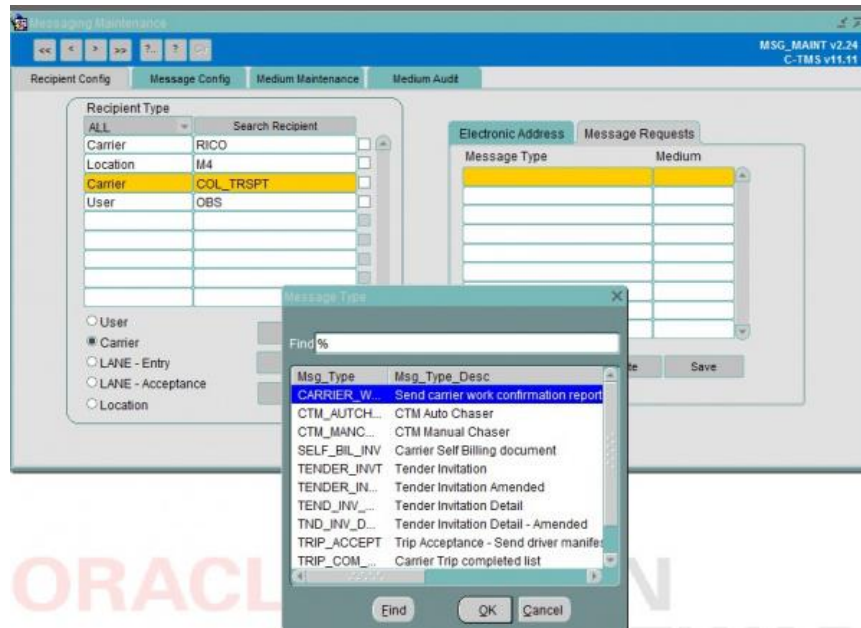
Select from here the type of messages you want the recipient to receive. Note, you can create more than 1 type of request.

Carriers generally receive emails of type:

- Tender Invitation
- Tender Invitation Amended
- Tender Invitation Detail
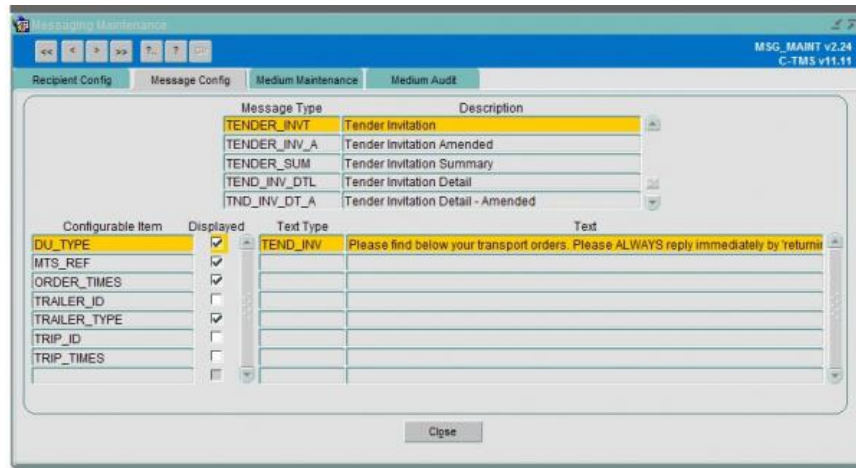- Tender Invitation Detail - Amended

Once the setup is done, messages will be sent to Carriers automatically whenever a Trip that is assigned that particular carrier, (in this example TEST02) is set to a status of 'Tendered'. An important point to be noted here is that all the time windows on the Trip should be in a future date.

💡 **Note:** Messages to locations can be set up in the same way. These are action when a user clicks the 'Message' button in the Trip Manipulation or Trip Planning forms, but only for trips in a status of 'Accepted'

To view message content and status, select the Administration Menu and Message Monitoring form. This form holds messages sent for the previous 30 days. If the message sent is older than 30 days select the Archived Messages option from the Administration menu.

The 'Message Config' tab within the Message Monitoring form is used to define items that will appear in a specific type of message. Tender Invitation has beed displayed in the screenshot below as an example:

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An example of the contents of a 'Tender Invitation' email is detailed below:

1.2 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
CTM_MSG_CHASE_AFTER	Time(mins) after which a message should be sent to a carrier after failure to respond	CARRIER
CTM_MSG_CHASE_AFTER	Time(mins) after which a message should be sent to a carrier after failure to respond	CARR_GROUP
MSG_CONCAT_TIME_PERIOD	Message concatenation time period (minutes)	SYSTEM
MSG_LOC_ORD_DEL_BY_DELIVERY	Set to Y if message body for event LOC_ORD_DEL is to show delivery details	SYSTEM
MSG_NAKS	Send an email message for NAK responses (Y/N)	SYSTEM
MSG_NAKS_EMAIL	The email recipient for a message for NAK responses	SYSTEM
MSG_NAKS_TYPE	A list of NAK event types to send an email message	SYSTEM
MSG_SCHEMA_URL	XSD Schema URL Path	SYSTEM
MSG_SCHEMA_XSD	XSD Schema XSD Name	SYSTEM
MSG_SENDER_TRIP_ACCEPT	The sending email address for a the trip accept message.	COST_CENTRE
MSG_SEND_HOURS_THRESHOLD	Threshold in hours before current date when Trip messages will still be sent (using trip start date)	SYSTEM
MSG_SUBJECT_BKNG_DTL	Message Subject for Booking Detail message	SYSTEM
MSG_SUBJECT_BKNG_DTL_L	Message Subject for Lane Booking Detail message	SYSTEM
MSG_SUBJECT_CTM_AUTCHASE		SYSTEM

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Parameter	Description	Level
	Message Subject for Carrier Trip Management (CTM) Auto Chase Messages	
MSG_SUBJECT_CTM_MANCHASE	Message Subject for Carrier Trip Management (CTM) Manual Chase Messages	SYSTEM
MSG_SUBJECT_LANE_ACD_DTL	Message Subject for Lane Accepted Detail message	SYSTEM
MSG_SUBJECT_LANE_ACPTD	Message Subject for Lane Accepted message	SYSTEM
MSG_SUBJECT_LANE_ACPTD_A	Message Subject for Lane Accepted Amended message	SYSTEM
MSG_SUBJECT_LANE_A_DTL_A	Message Subject for Lane Accepted Amended Detail message	SYSTEM
MSG_SUBJECT_LOC_ORD_DEL	Message Subject for Pre-warning Order delivery message	SYSTEM
MSG_SUBJECT_MANIFEST	Message Subject for Network Rail Manifest message	COST_CENTRE
MSG_SUBJECT_MANIFEST	Message Subject for Manifest message	SYSTEM
MSG_SUBJECT_MANIFEST_A	Message Subject for Manifest Amended message	SYSTEM
MSG_SUBJECT_MANIFEST_DTL	Message Subject for Manifest Detail message	SYSTEM
MSG_SUBJECT_MANIFEST_SUM	Message Subject for Manifest Summary message	SYSTEM
MSG_SUBJECT_MANIFE_DTL_A	Message Subject for Manifest Detail Amended message	SYSTEM
MSG_SUBJECT_SELF_BIL_INV	Message Subject for Self bill Credit note	SYSTEM
MSG_SUBJECT_TENDER_INVT	Message Subject for Tender Invitation message	SYSTEM
MSG_SUBJECT_TENDER_INV_A	Message Subject for Tender Invitation Amended message	SYSTEM
MSG_SUBJECT_TENDER_SUM	Message Subject for Tender Invitation Summary message	SYSTEM
MSG_SUBJECT_TEND_INV_DTL	Message Subject for Tender Invitation Detail message	SYSTEM
MSG_SUBJECT_TND_INV_DT_A	Message Subject for Tender Invitation Detail Amended message	SYSTEM
MSG_SUBJECT_TRIP_COM_LST	Message Subject for Trip Completed List	SYSTEM
MSG_SUB_DEPOT	Identifies the depot to replace with the current depot of the order items in the emails to invite tenders.	SYSTEM
MSG_TRIP_CONTACT	Messaging Contact Details	COST_CENTRE
SEND_MANF_TO_SUPP	Indicates if the supplier manifest report will be automatically generated when a trip is accepted for the cost centre of the trip being collected.	COST_CENTRE
SEND_MANF_TO_SUPP	Indicates if the supplier manifest report will be automatically generated when a trip is accepted for the cost centre of the trip being collected.	CUSTOMER
TA_EMAIL_SUBJECT	Email subject for automatically e-mailing manifest	COST_CENTRE
TA_EMAIL_SUBJECT	Trip accept. Email subject.	SYSTEM
TA_EMAIL_TEXT	Trip accept. Email message	SYSTEM
TA_EMAIL_TEXT	Email text for automatically e-mailing manifest	COST_CENTRE
TA_FILE_NAME	Trip accept. Name of output file.	SYSTEM
TA_FTP_DIRECTORY	Trip accept. FTP report to upload directory.	SYSTEM
TA_FTP_IP_ADDRESS	Trip accept. FTP report to IP address.	SYSTEM
TA_FTP_PASS	Trip accept. FTP report using password.	SYSTEM
TA_FTP_PORT	Trip accept. FTP port.	SYSTEM
TA_FTP_USER	Trip accept. FTP report using username.	SYSTEM
TA_PDF_TO_TIFF1	Trip accept. Convert pdf to tiff.	SYSTEM
TA_PDF_TO_TIFF2	Trip accept. Convert pdf to tiff.	SYSTEM
TA_PDF_TO_TIFF3	Trip accept. Convert pdf to tiff stage 3.	COST_CENTRE
TA_PDF_TO_TIFF3	Trip accept. Convert pdf to tiff. Rotation for landscape	SYSTEM
TA_REPORT_NAME	Trip accept. Name of report to be run. Please include the .rep extension.	COST_CENTRE
TA_REPORT_NAME	Trip accept. Name of report to be run. Please include the .rep extension.	SYSTEM
TA_SUB_FROM	Trip accept. Sub file from	COST_CENTRE
TA_SUB_FROM	Indicates Zetafax value in .sub file in FROM:	COST_CENTRE
TA_SUB_FROM	Trip accept. Sub file from	SYSTEM
TA_SUB_ORGANISATION	Trip accept. Sub file organisation	SYSTEM
TA_SUB_PRIORITY	Trip accept. Sub file priority	SYSTEM

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Parameter	Description	Level
TA_SUB_USER	Trip accept. Sub file user	COST_CENTRE
TA_SUB_USER	Trip accept. Sub file user	SYSTEM
TA_SUB_USER	Indicates Zetafax value in .sub file in USER:	COST_CENTRE
TEND_EMAIL	Different format for Tender invitation	SYSTEM

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2 Message Monitoring

2.1 Message Monitoring Form

The message monitoring form allows a user to choose a date and view all the messages that have been created on that day. The user can filter the messages using one or many of the following filters; the event that created the messages, the message type, the medium by which it is being distributed, the status of the message and if required the user can also search for the event reference of the message. The user is then also able to sort the results by created time, sent time, address value and subject.

An archive version of this form has also been created which will allow users to view archived messages.

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3 Archived Messages

Messages sent that are older than 30 days can be viewed in the archive messages screen.
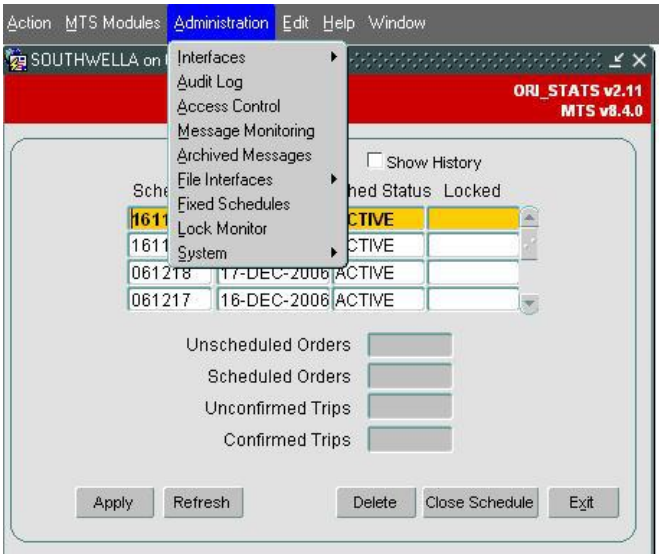
The Message Monitoring & Archive Messages forms are identical in layout and operation. Select the date that the message has been sent and click refresh.