



Aptean

Debrief - Trip Debrief Guide

Calidus TMS - 12.48

29th April 2025 - 2.0
Reference: DEBRIEF

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1 Debrief Invoice

Debrief by Invoice supports the process of manually generating customer invoices based on the receipt of an invoice from the haulier for transport undertaken. The Haulier invoice will contain an invoice number; a list of trips that has been undertaken within a particular time period; the cost of each trip and any additional charges that they may have incurred.

1.1 Invoice Processing

Once the Haulier invoice has been received, the invoice reference is keyed into the Debrief form, this creates an invoice in a status of 'New'. The trips can then be added to the invoice, this is done using the trip reference (Bill of Lading).

This will then list all of the order lines and generated payments on the screen.

You can add comments to the invoice, set the received and approved date and set the filing number.

You can edit an order directly by right-clicking on an order and selecting *Edit Order*.

You can add lines to the invoice by entering the details and using the **+** button.

You can set the currency of the invoice by selecting a common currency between the carrier and cost centre using the Ccy drop-down list provided.

Once the haulier's invoice details have been stored in the system, the invoice will become payable.

- The POD - Proof of Delivery should be entered.
- The payments associated with the trip can be altered and applied to the invoice.
- The status of the trip can be promoted from 'Accepted' to 'Confirmed'.
- The status of the invoice is moved from 'New' to 'Pending'.
- Once paid the invoice is then changed to a status of 'Closed'.

In addition, the following things may happen in exceptional circumstances:

- The order may be Aborted, in which state it will still be charged for. You can do this by right-clicking on the order line in the list and selecting the *Abort Order* option.
- The Payment associated with the trip may be modified to reflect the amount shown on the Haulier's invoice. You can do this by right-clicking on the payment in the list and selecting the *Edit Payment* option. You can view the details of the payment by right-clicking on the payment in the list and selecting the *View Payment* option.



Additional Payments may be created and associated with the Trip. You can do this by right-clicking on the payment in the list and selecting the *Create New Payment* option.

You can delete payments by right-clicking on the payment in the list and selecting the *Delete Payment* option.

1.2 Key Functionality

1.2.1 New/Find

NEW allows invoices to be generated when the Haulier's invoice number is entered into the Invoice Ref field. If an invoice has already been partially entered, then by pressing the FIND button, the details will be displayed.

1.2.2 Add Trip

In order to add a trip to an invoice the Trip Reference (Bill of Lading - received from external system(s)) is entered. The first trip is used to indicate to the system which carrier and cost centre is involved to enable it to create the Haulier invoice for the correct relationship. The information pertaining to the trip will be populated, showing the Payment Transactions (in the middle section) and the Order details (bottom section)

1.2.3 Add Payments

If there are additional payments on the hauliers invoice which are not shown on the system, and these payments are agreed, then additional payments must be created using this button, these will be applied to the trip. You can also do this by right-clicking on the payment in the list and selecting the *Create New Payment* option.

1.2.4 Confirm Trip

When all the actuals have been entered, and all of the transactions applied to the invoice, the trip should be confirmed by pressing the CONFIRM button.

1.2.5 Close Invoice

Once ALL the trips on the invoice has been 'confirmed', the invoice can be 'closed', this means that no more transactions can be added to it.

1.2.6 Entering Miscellaneous Transactions

In the case where a non-allocable payment has been applied to a trip, it may be necessary to manually enter the corresponding customer charge. This can either be done directly from the order section of the Debrief Invoice form or the payment can be 'miscellaneous', in the sense that it is not associated with a trip or an order. To enter such a payment, select 'Payments' from the 'Accounting' menu. This will invoke the payments summary window, in order to add a payment manually, select the Debit and Credit accounts by selecting them from the pull-down lists.

1.2.7 Customer Invoicing

Generating customer invoices can be done by going into the Invoice Summary form. This is accessed by selecting the Accounts menu. The Debit and Credit Accounts can be filtered if a particular invoice account is required to be generated.



1.2.8 Printing a Customer Invoice

In order to print the invoice, select the Debit & Credit account from the drop down list and then right-click on the mouse,



2 Order Debrief

Order Debrief supports the process of manually updating the actual collection and delivery details, rather than planned details, on Orders and their associated Trips. This actual collection and delivery information is typically referred to as "actuals". The Order Debrief form provides the user with a straight forward means of updating and storing actuals and focuses the user on their current workload i.e. those Orders that need to be debriefed so that the subsequent billing activities can be undertaken.

The entry of "actuals" will usually be completed by one of three parties; the customer, the carrier or a member of the central planning team.

The screenshot shows the 'Order Debrief' application window. At the top, there are navigation buttons (back, forward, search, etc.) and a status bar indicating 'ORD_DEBRIEF v1.21' and 'C-TMS v12.45'. Below the navigation bar, there are buttons for 'Search', 'Clear Search', 'Refresh', 'Save', 'Cancel', and 'Close'. A message states 'Advanced Filter: You have 5 outstanding Order(s)'. Below this is a table listing orders with columns: Order Ref, From Loc, From Loc Name, To Loc, To Loc Name, Earliest Collection, Latest Delivery, Customer Ref, POD Ref, POC, and POD. The table contains 5 rows of data. Below the table, there are buttons for 'Select All Orders', 'Order Details', 'View POD', 'Advanced Filter', and 'Export'. The 'Order Details' tab is selected, showing a form for the selected order. The form includes fields for Lane Id, From Id, To Id, Lane Name, From Name, To Name, Customer, Carrier, Product Type, and DU Type. It also shows creation and modification dates and times, and text areas for Order Comments and Lane Comments.

Order Ref	From Loc	From Loc Name	To Loc	To Loc Name	Earliest Collection	Latest Delivery	Customer Ref	POD Ref	POC	POD
109	LBZ	Site 3	Pri1633	Prince of Wales Pharmacy	11/07/23 09:00	12/07/23 12:00	CLT91523			
111	LBZ	Site 3	58	RAHANU LTD B23 5DD	11/07/23 09:00	12/07/23 12:00	CLT91525			
21	LBZ	Site 3	Pri1633	Prince of Wales Pharmacy	11/07/23 09:00	13/07/23 12:00	TWTEST21			
121	LBZ	Site 3	65	CHAND MISTRY T/A GRA	11/07/23 09:00	12/07/23 12:00	CLT91535			
119	LBZ	Site 3	29	MALPAS PHARMACY - GE	12/07/23 09:00	12/07/23 12:00	CLT91534			

Order Details

This tab shows all details for the order you have selected.

Lane Id: [] Lane Name: []
 From Id: LBZ From Name: Site 3
 To Id: Pri1633 To Name: Prince of Wales Pharmacy

Customer: CLARITY
 Carrier: BRM
 Product Type: AMBIENT
 DU Type: BOX

Created By: MTS_OWNER at 07/07/23 17:02
 Last Modified By: MTS_OWNER at 21/08/23 13:54

Order Comments: [] Lane Comments: []

2.1 Usage

The form displays a line for each Order that remains to be debriefed. Only **Orders** scheduled onto Accepted Trips that have not been debriefed, i.e. do not have Proof of Collection (POC) or Proof of Delivery (POD) confirmed, will appear in this screen.

On the tab pages below the selected Order, the general Order Details, Collection Details and Delivery Details are separated so that the user can focus on the area of information they need to process.

This screenshot shows the 'Order Details' tab selected. It displays the same form as the previous screenshot, showing details for the selected order (Order Ref: 109). The form includes fields for Lane Id, From Id, To Id, Lane Name, From Name, To Name, Customer, Carrier, Product Type, and DU Type. It also shows creation and modification dates and times, and text areas for Order Comments and Lane Comments.

Order Details

This tab shows all details for the order you have selected.

Lane Id: [] Lane Name: []
 From Id: LBZ From Name: Site 3
 To Id: Pri1633 To Name: Prince of Wales Pharmacy

Customer: CLARITY
 Carrier: BRM
 Product Type: AMBIENT
 DU Type: BOX

Created By: MTS_OWNER at 07/07/23 17:02
 Last Modified By: MTS_OWNER at 21/08/23 13:54

Order Comments: [] Lane Comments: []



On the Collection and Delivery Details tab pages, Actuals can be manually entered into the fields with a white background or can be copied from planned data using the **Copy** button, saving both time and effort in those situations where the actual data matches the planned.

Non-Conformances can also be recorded against the Order to keep a detailed history of any issues with the Delivery (or Collection if processing Collection information) of the Order.

2.1.1 Multi-Order Selection

To further save time and effort, the form provides a multi-Order debrief capability, which is invoked by selecting multiple Orders in the top section of the screen. Once multiple Orders are selected an alternative section of screen is displayed whereby the user can copy planned data to actual for Collection, Delivery or both. The operator can also choose whether to overwrite or maintain any existing actual data from a previous debrief cycle.



Order Debrief

Show Where Clause Show Export Stmt Debug

ORD_DEBRIEF v1.21 C.TMS v12.45

Search Clear Search Refresh Save Cancel Close

Advanced Filter: You have 5 outstanding Order(s).

Order Ref	From Loc	From Loc Name	To Loc	To Loc Name	Earliest Collection	Latest Delivery	Customer Ref	POD Ref	POC	POD
✓ 109	LBZ	Site 3	Pri1633	Prince of Wales Pharmac	11/07/23 09:00	12/07/23 12:00	CLT91523			
✓ 111	LBZ	Site 3	58	RAHANU LTD B23 5DD	11/07/23 09:00	12/07/23 12:00	CLT91525			
21	LBZ	Site 3	Pri1633	Prince of Wales Pharmac	11/07/23 09:00	13/07/23 12:00	TWTEST21			
121	LBZ	Site 3	65	CHAND MISTRY T/A GRA	11/07/23 09:00	12/07/23 12:00	CLT91535			
119	LBZ	Site 3	29	MALPAS PHARMACY - GE	12/07/23 09:00	12/07/23 12:00	CLT91534			

Multi-Order Debrief

You can copy planned data to actual data for all selected Orders.

☐ Collection
☐ Delivery
☐ Overwrite Actual Data

Copy Planned Data

2.1.2 Order Searches

Although the form defaults to showing the current debrief workload for the user (driven by their user parameter configuration) it is also necessary to allow the operator to search for Orders or sets of Orders that they know require attention. To satisfy this requirement the Order Debrief form includes two search facilities: the Basic Search and an Advanced Filter.

The Basic Search is invoked via the **Search** button at the top of the screen. This swaps the list of Orders for a search area allowing the user to search by any of the displayed columns. This is useful when many Orders remain to be debriefed and the user wants to group the Orders into sets so that the workload is easier to view and process. This grouping could be by date range or source location, for example.

The Advanced Filter, which is invoked via the **Advanced Filter** button, takes the Basic Search principle a step further. Advanced filtering provides many more fields than the Basic Search so allows the user to quickly find specific Orders or sets of Orders that require debrief.

Advanced Filter

This screen allows you to make advanced queries. The results will be shown in the orders overview above.

Order Windows

Earliest Collection - After 01/01/23

Latest Collection - Before

Earliest Delivery - After

Latest Delivery - Before

Order Status

☐ Outstanding
☐ All

Customer Group

A1_PHARM
AAHTAM
ARROTT

Customer

A1_PHARM
AAHTAM
ABBFS3

Carrier

3PC
ALB
ANG

Trip Reference

Lane Id

From Id

To Id

Lane Name

From Name

To Name

Product Type

AMBIENT
CHILLED

DU Type

BOX
PALLET

Cancel

Search

2.1.3 Additional Features

The final feature of the Order Debrief form allows the operator to **Export** their current workload as a list of **Orders** that could be opened, for example, in a spreadsheet. This facility is included to support activities associated with the debrief process, such as, scrutiny of the pending or debriefed data by the management team. The Orders exported are those selected in the Order list.



3 Trip Debrief

Trip Debrief functionality is used within C-TMS software to enter the actual milestones of the trip, actual despatched and delivered quantities, order info, POC/POD, Odometer reading, etc.

The Aptean TMS Calidus Edition Debrief process has the capability to capture the following debrief information:

- Trip level:
 - ◆ General comments.
 - ◆ Fuel Drawn.
 - ◆ ODO start/end.
 - ◆ Comments - general/rejection/errors.
- Stop level:
 - ◆ Arrive/Depart times.
- Order level:
 - ◆ Actual quantities/weights.
 - ◆ POC/POD complete.
 - ◆ Additional Coll/Del debrief information, such as weighbridge/weight.
 - ◆ Additional order references.
 - ◆ Order level non-conformity/information/late codes.
- Order Items:
 - ◆ Actual quantities/weights.
- Additional finance payments.
- Additional trip services (for generation of trip cost).
- Additional Order Services (for capture of additional services per order, generating order revenue).
- Trip Tasks/Trip Stop Tasks - additional extensible task information.

Order and trip statuses can be set to identify the status of the order, and rebooking of incomplete or partially incomplete orders is supported.

Order and Trip Debrief information may also be captured through various bespoke interfaces, from external systems (such as C-ePOD or APOD), through Calidus Portal and through **Imports**:

- **DEBRIEF**

The Trip Debrief screen can be accessed from the C-TMS Modules menu, Trip Management, Trip Debrief.

3.1 Usage

The Sched and Trip drop down lists are used to select the required trip. If you are entering this debrief screen from another screen (such as the Planning screen, through the *Debrief Trip* right-click option), then the Schedule and Trip will be selected for you.

Once a specific trip is selected, the bottom section will display details on trip stops along with planned arrive and depart time. Here you can update the stops with actual arrive and depart times, or assign trailers to a stop.

This data layout is configurable.



You can add an order to the trip on debrief using the **Add Order** button provided.

You can calculate times for the stops using the **Calc Times** button.

The trip debrief form has a **View POD** button in order to call an external system for the display of the stored POD Document. Note that this is applicable **ONLY** to the Calidus ePOD system. The URL is configurable through system parameters. When clicking on the **View POD** button, a POD report is produced and opened in a new tab in your browser. This can then be emailed to a recipient by completing the email to field and pressing the **Email** button.

The status of the **trip** can be updated by selecting a status from the drop down list and clicking the **Set Status** button. An informational message appears to inform you that the status has been changed.

The **Set Actuals** button will pre-populate all the Stops actual arrive and actual depart date/times with those values held in the planned fields. The user can debrief by exception here by only entering in the actual times at the stops where the planned times were not met. Clicking the **Set Actuals** button at this point will fill in the rest of the actuals, except if the stops actuals can not be met when compared to the depart time at the previous stop.

E.g. If the manually entered Actual Depart time at Stop 2 is after the Planned Arrive time at Stop 3, the system will not pre-populate Stop 3 Actuals as it is not possible to meet this Planned Arrive deadline when compared to the Actual Depart Time at Stop 2.

The **Set Desp** button in the *Order Debrief* tab will pre-populate Actual Despatched Quantity, Weight, Volume and Cases with those values held in the Planned columns, for each order line. This also has the Debrief by Exception functionality, where if the user manually enters Actuals for 1 order line and clicks **Set Desp** then all other Order Line quantities will be pre-populated, except those manually entered.

The **Set Del** button in the *Order Debrief* tab will pre-populate Actual Delivered Quantity with the value held in the Planned column, for each order line. This also has the Debrief by Exception functionality, where if the user manually enters Actuals for 1 order line and clicks **Set Del** then all other Order Line quantities will be pre-populated, except those manually entered.

The **Set All Actuals** button is a combination of the functionality for the **Set Actuals**, **Set Desp** and **Set Del** buttons. Users can debrief by exception in all areas as detailed above, and then click **Set All Actuals** to populate all other actuals quantities where feasible.

3.2 General tab

The *General* tab is used to enter Driver and Vehicle info, if they previously weren't entered. You can add General Comments here by right-clicking on the General Comments area and selecting *Add Comment*. You can also edit existing comments using the *Edit Comments* pop-up option. You can view rejection comments and errors here.



3.3 Driver Debrief tab

In the *Driver Debrief* tab, you can enter the information related to the Fuel Drawn, ODO Start and End readings. You will notice that the 'Actual Distance', 'Actual Distance per litre', 'Emissions' and 'MPG' are displayed here, calculated by the system if configured to do so.

Note that the units for ODO readings are set against the system, not per vehicle.

You can also enter total trip work days, and total trip break days, hours and minutes.

3.4 Order Debrief tab

The *Order Debrief* tab is used to capture the Actual Quantities/Volume/Weight Despatched, Actual Quantities/Volume/Weight Delivered, POC/POD and Non-conformances, if any.

This data layout is configurable and by default will show the following information:

- Stop
- Load Location
- Stop
- Unload Location
- Cust Ref
- Line
- Product Type
- DU Type
- Plan
- Actual Despatch
- Actual Deliver
- Plan Weight
- Actual Weight
- Plan Volume
- Actual Volume
- Plan Cases
- Actual Cases
- C - checkbox to show collected
- D - checkbox to show delivered
- **POC**
- **POD**

Additionally, you can also view and in some cases enter the following against each order line:



- Packed Quantity
- Temperature at delivery stop.
- Returns -
 - ♦ Exchange DU Type and Quantity
 - ♦ Received DU Type and Quantity
 - ♦ Ticket Returned and Date
- Time Variance
- Actual Despatched RPE Quantity
- Actual Dimensional Weight
- Contractual Weight
- Signature

If the actual delivered quantity is less than the actual despatched quantity, this will prompt a message box stating that there is a discrepancy between the despatched and the delivered.

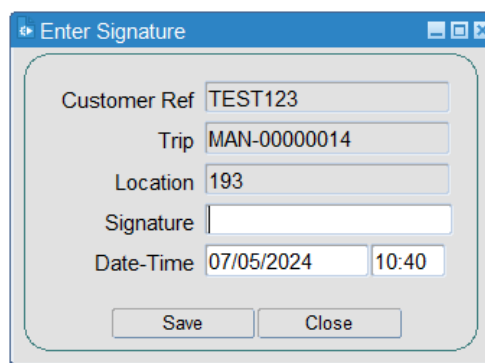
You can click on the **Non Conformance** button to bring up the Non Conformance form where you can select the reason:

You can be offered to rebook or return here - see the Rebooking process below for more details.

You can add an order-level reason here using the **Add Order Reason(s)** button:

Selecting **Set Signature** allows you to record the name of the signatory at the delivery location.





The 'Enter Signature' dialog box contains the following fields and buttons:

- Customer Ref: TEST123
- Trip: MAN-00000014
- Location: 193
- Signature: (empty text box)
- Date-Time: 07/05/2024 10:40
- Buttons: Save, Close

The date and time are pre-populated with the current date and time when the set signature button was selected. The date and time may be overwritten.

Note that you can add the signature to the table as well, for visibility.

Clicking the **POC** or **POD** next to an order line will set the POC/POD flag to Y, for that particular order. Clicking the **POC All** or **POD All** buttons will set the flag to Y for all orders on the current trip.

Your implementation team can enable equipment movement tracking. This audits the movement of equipment (DU types) through the network. This is based on the "actual" values entered against these lines, whenever there are changes to the values.

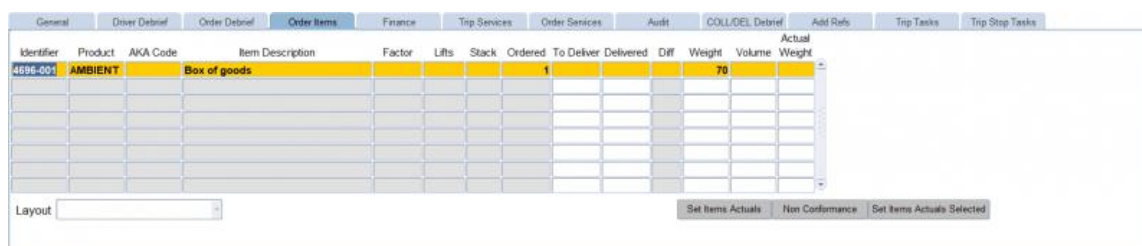
Equipment moves will track:

- Changes to Actual Despatched Quantities (action type "DESP")
- Changes to Actual Delivered Quantities (action type "DEL")
- Changes to Media Returns Quantities (action type "EXCH")
- Changes to Received Quantities (action type "RET")

The data stored against these can be extracted from the system using the Equipment Moves extract.

3.5 Order Items tab

The *Order Items* tab is used to capture the Actual Quantities/Volume/Weight Despatched, Actual Quantities/Volume/Weight Delivered and Non-conformances, if any.



The screenshot shows the 'Order Items' tab with the following data:

Identifier	Product	AKA Code	Item Description	Factor	Lifts	Stack	Ordered	To Deliver	Delivered	Diff	Weight	Volume	Weight
4696-001	AMBIENT		Box of goods				1				70		

At the bottom of the table, there are buttons: 'Set Items Actuals', 'Non Conformance', and 'Set Items Actuals Selected'. A 'Layout' dropdown menu is also visible.

This data layout is configurable and by default will show the following information:

- Identifier - display only
- Product - display only
- AKA Code - display only
- Item Description - display only
- Factor - display only
- Lifts - display only
- Stack - display only
- Ordered - display only
- To Deliver
- Delivered



- Diff - display only - calculated difference from above quantity fields
- Weight
- Volume
- Actual Weight

Additionally, you can also view and in some cases enter the following:

- Actual Dims:
 - ◆ Length
 - ◆ Width
 - ◆ Height
 - ◆ Weight - display only
- Contractual (Charge) Weight
- Pallet ID - You can also indicate if your items are palletised through the Pallet ID.
- Units
- SAP Line No - display only

You can set the actual To Deliver and Delivered quantities for the selected line using the **Set Item Actuals Selected** button, or set all of the order items actual values using the **Set Item Actuals** button.

You can click on the **Non Conformance** button to bring up the Non Conformance form where you can select the reason:

3.6 Finance tab

The *Finance* tab is used to display Trip Costs and allow the user to add payments.

You can access the detail of the payments using the **Payments** button to bring up the **Payments** screen.

3.7 Trip Services

The *Trip Services* tab can be used to add any additional services to the trip:



Service Id	Name	Qty	Value	Total Cost	Inherited

Save New Edit Delete

You can add or edit the trip services using the **New** or **Edit** buttons provided. When adding or changing, you can use a lookup on the service ID to identify any services configured at trip level. You must enter the quantity and value. The total cost will calculate from the quantity and the value, and the charge will default to not being inherited.

Trip level services may generate costs against a trip.

When you have finished editing or adding, you can save your changes using the **Save** button provided.

You can delete services using the **Delete** button provided.

3.8 Order Services

The *Order Services* tab can be used to add any additional services to the orders on the trip:

OMS Ref	Service Id	Name	Qty	Value	Total	Inherited

Save New Edit Delete

You can add or edit the services using the **New** or **Edit** buttons provided. When adding or changing, you can use a lookup for the orders on the trip, and a lookup for the service ID to identify any services configured at order level. You must enter the quantity. If Services Capture has been set up in *Accounts* with a charge value for the Service for that customer (or all customers), then the charge value will be defaulted, otherwise you must enter a charge value. The total cost will calculate from the quantity and the value, and the charge will default to not being inherited.

Order level services may generate revenue against an order.

When you have finished editing or adding, you can save your changes using the **Save** button provided.

You can delete services using the **Delete** button provided.

3.9 Audit tab

The *Audit* tab is used to display details on trip status change.

Action	Trip Status	Camer	Action Date	TZ Abbr	Actioned By
CREATE	PLANNED		07-MAR-2024 08:08		MTS_OWNER
MOOFY	PLANNED	LBZ	07-MAR-2024 08:19		MTS_OWNER



3.10 COL/DEL Debrief tab

The *COL/DEL Debrief* tab can be used to capture additional collection/delivery information on orders/stops. This is commonly used for bulk loads.

The first order is selected for you by the screen. You can navigate to the next or previous orders using the buttons provided.

You can enter:

- Collection Date and Time.
- Delivery Date and Time.
- Collection Point Arrival Time
- Delivery Point Arrival Time
- Collection Point Departure Time
- Delivery Point Departure Time
- Vehicle Reg
- Trailer Number
- Delivered Weight (Tonnes)
- Weighbridge Ticket
- POD Received Date
- Average MC

You can quickly debrief the entire trip from here using the **Debrief** button provided, as long as you have already entered the required stop times.

3.11 Add Refs tab

The *Add Refs* tab allows you to view or edit additional order references.

You can use the button to the right of the entry on the screen to view the value if it is too long for the screen to display.

You can add a new order reference on this screen by finding an empty line and entering the details here.

You can save changes to additional order references using the **Save References** button provided.

3.12 Trip Tasks tab

The *Trip Tasks* tab allows you to view trip tasks stored against the trip.



Note: Trip Tasks can only be added through the interface or through automatic debrief from some external POD application - as such its use is limited to those operations only.

3.13 Trip Stop Tasks tab

The *Trip Stop Tasks* tab allows you to view trip tasks stored against the trip stop.

Note: Trip Stop Tasks can only be added through the interface or through automatic debrief from some external POD application - as such its use is limited to those operations only.

3.14 Rebook Process

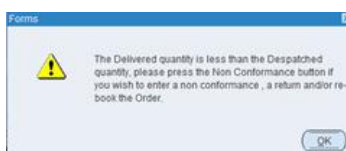
This section covers the rebook process.

It is natural to ask whether a failed order can be moved to another trip. This is not the process in CTMS. If a delivery is not completed the order should be zero debriefed. This is to keep the data integrity as to what has been planned against the actuals.

The order must then be rebooked onto another trip. The act of rebooking the order creates a new order within CTMS.

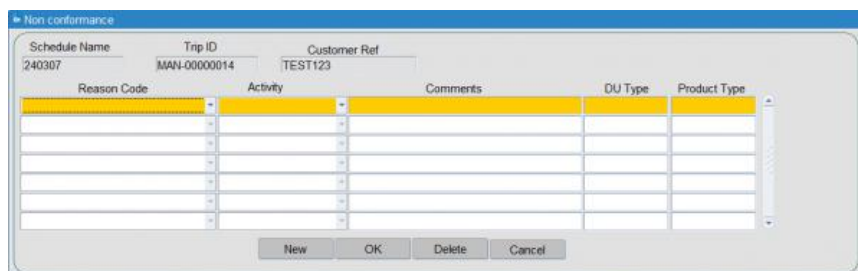
Within the debrief screen enter the despatch quantity this is the quantity that has been collected from the customer depot. You then need to enter the Actual Deliver quantity to zero as the delivery has not been made.

A popup box will appear advising to use the Non-Conformance process as the delivered quantity is less than the despatched quantity



You can click on the **Non Conformance** button to bring up the Non Conformance form where you can select the reason:



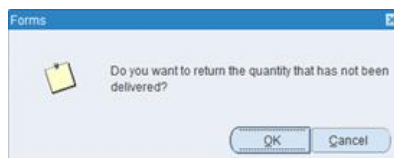


Non conformance

Schedule Name: 240307 Trip ID: MAN-00000014 Customer Ref: TEST123

Reason Code	Activity	Comments	DU Type	Product Type

New OK Delete Cancel




Forms

Do you want to return the quantity that has not been delivered?

OK Cancel

When you click **OK** the system will prompt for you to return the goods to the customer. In this case click **Cancel** as the goods are going to your depot.

The system will now prompt for you to rebook the Quantity.



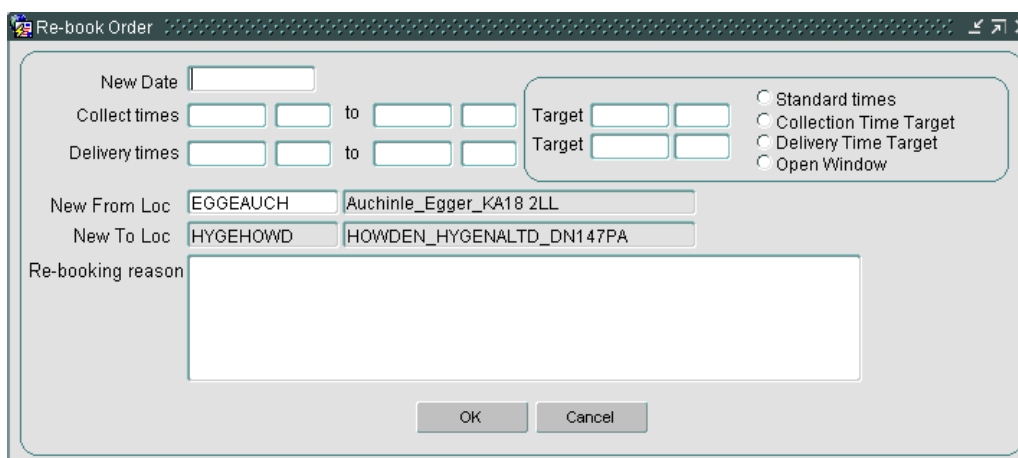
Forms

Do you want to re-book the quantity that has not been delivered?

OK Cancel

Click **OK**.

Enter the new date for the rebooked order. A new from Location should be entered as the depot the goods are originating from for the rebook. A rebook reason can also be entered.



Re-book Order

New Date:

Collect times: to Target: ☐ Standard times

Delivery times: to Target: ☐ Collection Time Target

☐ Delivery Time Target

☐ Open Window

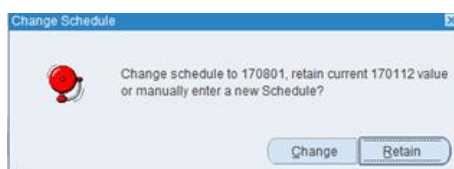
New From Loc: EGGEAUCH Auchinle_Egger_KA18 2LL

New To Loc: HYGEHOWD HOWDEN_HYGENALTD_DN147PA

Re-booking reason:

OK Cancel

Click **OK**. You will be prompted for confirmation to change the schedule of the rebooked order if applicable. You can **Change** it by manually entering a schedule or **Retain** it.



Change Schedule

Change schedule to 170801, retain current 170112 value or manually enter a new Schedule?

Change Retain

You will be advised that the order is rebooked and will then be in the order well for planning purposes.

When you view this rebooked order in the order well or planning screen, the customer reference will have an "_R1" displayed on the end to highlight that this is a rebook order.

Depending on system parameter configuration, several order references may be added to the order:



- Rebook Required - if a non-conformance has been entered against an item, and the reason is marked as can be rebooked, the order will be marked with Rebook Required set to "Y". When the order is rebooked, this will be reset to "N", to show that it has been successfully rebooked already.
- Rebook Count - the number of times this order has been rebooked.
- Rebook Ext Ref - the original Customer reference of the order.
- Rebook OMS Ref - the original OMS reference of the order.

Note that, when automatic debriefing of orders comes from an outside source, such as EPOD, Flexipod/APOD, 3rd party carrier POD messages, this may have set shortages and non-conformances against items automatically. In this case, as you are not manually debriefing, you can review the order quantities on the Order Debrief tab. You can double-click on the order line to review the order details, and see non-conformances, references and whether rebook is required. A Rebook button has been provided on this tab to allow you to trigger the start of the rebooking process as above.

3.15 Diary Exceptions Update

Once the trip has been completed, the actual completion time is checked and if it differs from the planned completion time the diary exceptions for the vehicle and driver attached to the trip will be updated. The diary exceptions based on the trip actuals will now show the amended time against the Vehicle. The diary exceptions are also updated against the Driver.

3.16 Further Configuration

The following system parameters affect this functionality:

Parameter	Description	Level
EPOD_VIEW_POD_URL	URL for C-ePOD Documents	SYSTEM
ALLOW_POC_EDIT	Allow users to edit the POC Flag in Debrief	SYSTEM
ASSET_DEBRIEF	Indicates if assets debriefed with Items	COST_CENTRE
CHANGE_DEBRIEF_LABELS	Controls the labels for certain items in the debrief and orders screen	SYSTEM
DEBRIEF_DRIVERS_HOURS	Enter Drivers hours worked at debrief	COST_CENTRE
DISPLAY_DESPATCHED_RPE	Display the Actual Despatched RPE Quantity in the Order Detail and Trip Debrief screens?	COST_CENTRE
OMS_ACTUALS_MANDATORY	Governs which ACTUAL_QUANTITY fields require mandatory population in Debrief forms.	SYSTEM
ORD_DEBRIEF_DAYS	Default number of days used to restrict Orders displayed by Order Debrief form.	SYSTEM
ORD_STACK_DEBRIEF	Order Stack Debrief	COST_CENTRE
TRM_DEBRIEF_SCREEN_TIME_VARIANCE_DISPLAYED	Is the Time Variance field displayed and updateable in the Trip Debrief screen.	SYSTEM
TRM_DESP_FOR_DEL	Maintain the Actual Despatched Quantity for a Delivery Trip in Trip Debrief (Y/N).	COST_CENTRE
TRM_ODO_DISTANCE_LIMIT	Limit used to validate difference between odo start and end entries in debrief areas of Trip Forms	SYSTEM
TRM_PREVENT_ALL_DEBRIEF	Prevent setting of actuals in trip debrief	SYSTEM
TRM_SHOW_TIME_DEBRIEF_BTNS	Show time debrief buttons in trip debrief	SYSTEM
TRM_STACK_DEBRIEF	Trip Stack Debrief	COST_CENTRE
TRM_TEMP_DEBRIEF	Display temperature on Trip debrief	SYSTEM
TRM_TRIP_STATUSES	List of Trip Statuses to control which trips displayed in Tripdtl/Trip Debrief form.	SYSTEM
TRM_UPDATE_ALL_ACTUALS	When a line actual is debriefed all actuals are set	COST_CENTRE



Parameter	Description	Level
TRP_STACK_DEBRIEF	Trip Stack Debrief	COST_CENTRE
BGW_AUTO_REBOOK	Indicates if auto rebook is switched on when non conformance is added	COST_CENTRE
DEFAULT_REBOOK_DEL_TYPE	Default Del type for Rebook	COST_CENTRE
REBOOK_COPY_SUB_REF_CONTACTS	Set as Y or N to copy Sub References on Rebook, contact details only i.e. SMS and Email details	COST_CENTRE
OMS_ALTERNATE_REBOOK	Alternative Rebook Functionality	COST_CENTRE
REBOOK_ALT_STATUS	If set to Y when an order is rebooked the original orders status will not be changed	SYSTEM
ORD_ENHANCED_REBOOK	Controls which rebook screen is displayed in the orders form	COST_CENTRE
REBOOK_REQ_SUBREF	Add Rebook Sub reference when CBR exception added to item	SYSTEM
REBOOK_SERVICE_LEVEL	Service Level For rebooked orders when set to copy use existing	SYSTEM

