



Aptean

# Debrief - Order Debrief Guide

Calidus TMS - 12.45

23rd May 2024 - 1.0  
Reference: DEBRIEF

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# 1 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.

**Order Debrief**

Navigation: << < > >> | Show Where Clause | Show Export Stmt | Debug | ORD\_DEBRIEF v1.21 | C-TMS v12.45

Buttons: 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 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			

Buttons: Select All Orders | Order Details | View POD | Advanced Filter | Export

**Order Details** | Collection Details | Delivery Details

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

Lane Id  
From Id LBZ  
To Id Pri1633

Lane Name  
From Name Site 3  
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

## 1.1 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.

**Order Details** | Collection Details | Delivery Details

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

Lane Id  
From Id LBZ  
To Id Pri1633

Lane Name  
From Name Site 3  
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



Order Details   **Collection Details**   Delivery Details

This tab allows you to enter actual data for the collection of the selected order.

**Planned Collection**

Earliest	11/07/23 09:00	Units	1.000
Arrival	12/07/23 06:43	Volume	.050
Departure	12/07/23 07:13	Weight	.000
Latest	11/07/23 12:00		

**Actual Collection**

Arrival		Units	
Departure	12/07/23 07:23	Volume	
POD/CMR		Weight	
Customer Ref	CLT91523		
POC	<input type="checkbox"/>		

**Non Conformances**


Order Details   Collection Details   **Delivery Details**

This tab allows you to enter actual data for the delivery of the selected order.

**Planned Delivery**

Earliest	12/07/23 07:00	Units	1.000
Arrival	12/07/23 15:45	Volume	.050
Departure	12/07/23 16:00	Weight	.000
Latest	12/07/23 12:00		

**Actual Delivery**

Arrival		Units	
Departure		Volume	
POD/CMR		Weight	
Customer Ref	CLT91523		
POD	<input type="checkbox"/>		

**Non Conformances**


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.

1.1.1 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 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

### 1.1.2 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**  
 Lane Name:  
 From Name:  
 To Name:

**Product Type**  
 AMBIENT  
 CHILLED

**DU Type**  
 BOX  
 PALLET

Cancel  
Search

### 1.1.3 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.

