



Aptean

Execution - Execution Screen Guide

Calidus TMS - 12.45

17th May 2024 - 1.0
Reference: EXECUTION

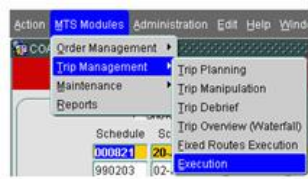
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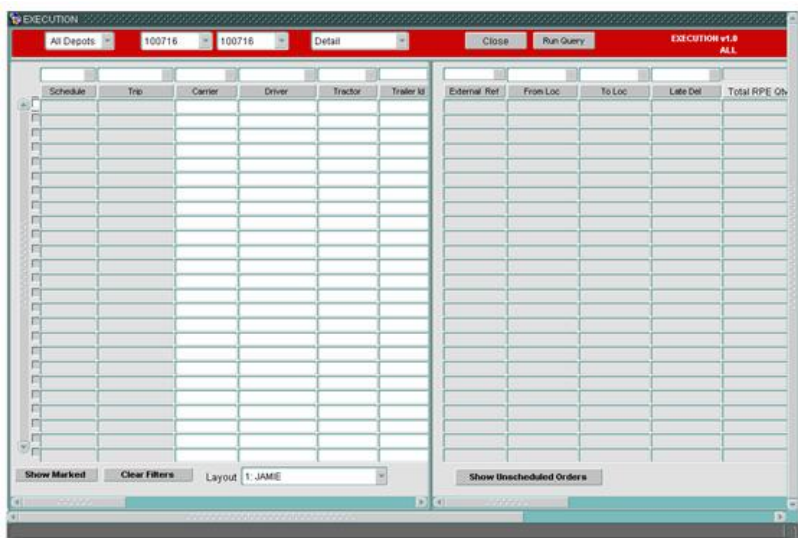
1 Execution Screen

1.1 Accessing the Screen

To access the screen follow the menu choices highlighted below:



The screen will be displayed as below:



For best visibility of the screen it is best to view the screen in Full Screen Mode, see below:



1.2 Unscheduled Orders Form

The first part of the screen is the Unscheduled Orders Form it displays the same information as the Order Well in the Trip Planning and Manipulation Screens.

To access the form select the button as shown below:



The form will be displayed as below:



The 'Unscheduled Orders' window displays a list of orders. The columns are: Customer, Cust Ref, From, To, Until, Weight, and RPE. The data is as follows:

Customer	Cust Ref	From	To	Until	Weight	RPE
MAPA SPONTEX	28965	EXELSTAN	TESCCALD	23:59	6	.25
MAPA SPONTEX	28972	EXELSTAN	TESCLICH	23:59	5069.83	37.0
MAPA SPONTEX	28973	EXELSTAN	TESCLICH	23:59	6	.25
MAPA SPONTEX	28964	EXELSTAN	TESCCALD	23:59	2769.8	26.9
MAPA SPONTEX	28934	EXELSTAN	TESCDONA	23:59	330.62	7.00
MAPA SPONTEX	28992	EXELSTAN	TESCDONA	23:59	2292.88	19.0
LORNAMEAD	106915	EXELSTAN	BUDGWELL	23:59	248.58	1.00
LORNAMEAD	106845	EXELSTAN	AGPASTOC	23:59	391.41	1.00
LORNAMEAD	106862	EXELSTAN	BOOTNOTT	23:59	140.94	1.00
LORNAMEAD	106477	EXELSTAN	M&NPARK	23:59	33.6	1.00
LORNAMEAD	106866	EXELSTAN	CAPPPONT	23:59	210.04	1.00
LORNAMEAD	106918	EXELSTAN	MUSOPONT	23:59	105.02	1.00
LORNAMEAD	106913	EXELSTAN	BIIBSCUN	23:59	735.14	2.00
LORNAMEAD	106869	EXELSTAN	BOOTNOTT	23:59	0	2.00
LESSER\$PAVE	842466	EXELSTAN	ROBEFARE	23:59	153.3	.48
LESSER\$PAVE	842467	EXELSTAN	ROBEFARE	23:59	249.5	.49
LESSER\$PAVE	842468	EXELSTAN	ROBEFARE	23:59	469.9	1.59
LESSER\$PAVE	842464	EXELSTAN	ROBEFARE	23:59	147.4	.59
LESSER\$PAVE	842465	EXELSTAN	ROBEFARE	23:59	191.8	.79
LESSER\$PAVE	841159	EXELSTAN	IEGHENFI	23:59	50.2	.11

The size of the form can be reduced or enlarged by holding the cursor over the edge of the form until this ? symbol appears and then dragging the margin in the desired direction.

1.3 Data Sort

Data can be sorted either alphanumerically or reverse alphanumerically by selecting a title header (example below), data can be sorted by any column.

The sorting options bar contains the following buttons: Ord Id, Cust Ref, From, From Loc Name, To, and To Loc Name.

1.4 Data Filters

The 'Unscheduled Orders' window includes the following filter options: Plan reg, Postal Reg, From, To, Loc, Curr Loc, Wgt, Vol, RPE, Current Depot, Layout, and Status.

The orders which are displayed in the Unscheduled Orders Form can be filtered using the filters above. This functionality is the same as that found in the Order Well in the Trip Planning Screen and the Trip Manipulation Screen.

There are various filter options which can be seen above, more than one filter can be applied at a time to drill down the information being displayed. The Clear Button removes any filters applied.

The Refresh Button updates the information displayed to provide the most current information, for example if new orders are being entered by another user or if orders have been scheduled onto a trip.

A new order can be entered using the New Order Button.

1.5 Right Click Options

If you right click when over any of the order information in the form you get the following menu:

Refresh

Configure Layout

Apply to Trip

Create New Trip

Apply via x-dock locations

Edit

Amend Values

Cancel Order

View Order Locations

1.6 Refresh

Is an alternative way of updating the data displayed (same functionality as the Refresh Button mentioned above).

1.7 Configure Layout

The fields displayed in the columns of the Unscheduled Orders Form can be configured individually for each user, to do this right click over any order information in the form and the menu shown below will be displayed:

Unscheduled Orders

Plan reg

Postal Reg

Wgt

Vol

RPE

Refresh

New Order

Clear

Order Filter

From

To

Loc

Curr Loc

From

To

Either

Current Depot

1

Layout 1: JAMIE

Status UNSCHEDULED

Customer	Cust Ref	From	To	Unit	Weight	RPE
MAPA SPONTEX	28965	EXELSTAN	TESCALD	23.59	6	.25
MAPA SPONTEX	28972	Refresh	JCH	23.59	5069.83	37.0
MAPA SPONTEX	28973	Configure Layout	JCH	23.59	6	.25
MAPA SPONTEX	28964	Apply to Trip	JALD	23.59	2769.8	26.9
MAPA SPONTEX	28934	Create New Trip	YONA	23.59	330.62	7.00
MAPA SPONTEX	28992	Apply via x-dock locations	YONA	23.59	2292.98	19.0
LORNAMEAD	106915	Edit	WELL	23.59	248.58	1.00
LORNAMEAD	106845	Amend Values	ITOC	23.59	391.41	1.00
LORNAMEAD	106862	Cancel Order	WOTT	23.59	140.94	1.00
LORNAMEAD	106477	View Order Locations	PARK	23.59	33.6	1.00
LORNAMEAD	106866		PONT	23.59	210.04	1.00
LORNAMEAD	106918		PONT	23.59	105.02	1.00
LORNAMEAD	106913		EXELSTAN	23.59	735.14	2.00
LORNAMEAD	106869		EXELSTAN	23.59	0	2.00

Select the Configure Layout option which will open the window shown below:

Configure Layouts

1: JAMIE

Default

All / None

Column	Curr Width	Min Width	New Width
ORDER_ID	34	30	
OMS_REF	75	30	
TEMPLATE_ID	75	30	
COST_CENTRE_NAME	78	30	
CUSTOMER	70	30	70
SCHED_NAME	54	30	
GROUP_NAME	68	30	
EXTERNAL_REF	75	30	
CONTAINER_NO	75	30	
BOOKING_REF	68	30	
DEL_POINT_REF	68	30	
FROM_LOC	54	30	
FROM_LOC_NAME	84	30	
FROM_LOC_TOWN	54	30	
FROM_LOC_POSTCODE	54	25	
TO_LOC	54	30	
TO_LOC_NAME	84	30	

Current selected width359

Maximum allowed width9999

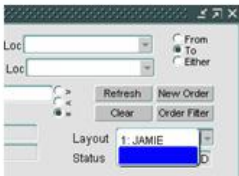
OK

Delete

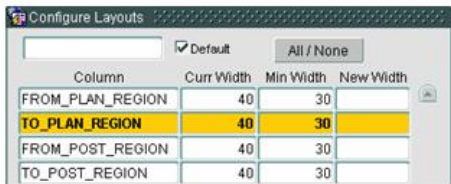
Cancel

To save any changes made to layout you must give the layout a name, this can be done by typing in the box in the top left of the form (see previous page). You do not have to type the number the system generates this. It is possible for each user to have multiple layouts.

To create an additional layout select the drop down arrow next to the Layout field and select the blank space at the bottom of the drop down (see below). This will change the layout to display the system default. This drop down menu is used to switch between layouts where a user has more than one layout configured.



Repeat the right click Configure Layout mentioned above, note the top left box displayed below is blank, to save any changes made you need to name the layout in this box.



If a user has more than one layout a Default layout can be selected by checking the Default box shown above. The layout that has this box checked will always be displayed when the form is first opened.

Fields highlighted in yellow will be displayed, to add or remove a field select that field then hold down left click on the mouse and the Ctrl button on the keyboard, fields will become yellow if they have been selected and return to white if removed.

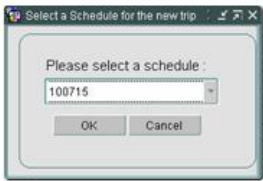
The width of each displayed column can be changed by typing in the New Width Column on the right of the form, please note that any field displayed has a minimum display width shown in the third column (above). There is also a maximum width allowed for the whole display (shown at the bottom right of the form) although the maximum for this form is so large it is unlikely to become relevant, it is worth considering how much will be visible without needing to enlarge the form.

1.8 Apply to Trip

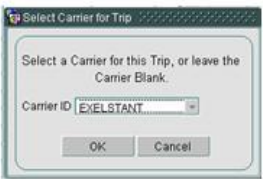
This allows you to add an order to the trip which is selected in the main Execution Screen (shown later). It is possible to select one or multiple orders to apply to a trip. To select multiple orders select the first order required by left clicking the mouse then hold down the Ctrl key on the keyboard and left click any other orders required, any highlighted orders will then be applied to the trip.

1.9 Create New Trip

This allows you to select either a single or multiple orders (as described for apply to trip) to create a new trip. Select required orders then right click and select Create New Trip you will be presented with the following box.



The schedule date will be populated if the main Execution Screen is displaying information for only one schedule date, if the screen is displaying a range of schedule dates you will need to select the schedule date that you want to create the trip on from the drop down list. Once selected you will be presented with the following box:



You can either select a carrier or create the trip without a carrier. A list of carriers is available by selecting the down arrow at the right of the field. When creating subsequent trips the Carrier ID field will be populated with the last carrier used.



1.10 Apply via X-dock Location

This allows you to select either a single or multiple orders (as described above). Select required orders then right click and select Apply via x-dock locations you will be presented with the following form (this follows the existing functionality in the Trip Planning and Trip Manipulation Screens).

X-dock Order

Sched 100801 OMS Ref 2090773 Cust Ref 28965

Collect From EXELSTAN Deliver To TESCCALD

Stanton_DHLExel_IP31 2BG
Caldicot_Tesco Stores Ltd_NP26 3TS

☐ Show inactive locations

Location Id	Location Name	New Trip?	Schedule	Trip Id	Carrier ID
		☒	100801		
		☐			
		☐			
		☐			
		☐			
		☐			
		☐			
		☐			
		☐			
		☐			

OK Cancel New Delete

1.11 Edit

This opens up the main order detail form as shown below:

Order details for 2091013

STATUS: SCHED_COLL 2091013 OMS Ref: 61135297 Booking Ref: 4464696 Customer Ref: 196579 Del Point Ref: 196579

Cost Centre: EXEL Customer: OXHOMETRADE Schedule: 100715 Group Name: EXELSTAN

Collect From: EXELSTAN Deliver To: DOONMELL

Current Location: DUMPORT01

Planned

Product Type	DU Type	Qty	Weight	Volume	Cases	RPE	Despatched	Delivered	Weight	Volume	Special Flag
AMBERANT	CHEP PALLET	8,000	9,253.00	8.00000	804	8.00					

Original Date: 8 000 9,253.00 8.00000 804 8.00

Special Instructions:

New Order View Info Save Close Re-book

1.12 Amend Values

This provides a short cut to changing certain order details without opening the order details as above.

Edit Values for 867448

Booking ref: []

DU Qty: 26

Earliest Del: 07/08/10 08:30

Latest Del: 07/08/10 23:59

Create Trip OK Cancel

1.13 Cancel Order

This allows a user to cancel an order and it will no longer appear in Unscheduled Orders Form or in the Order Well in the Trip Planning Screens. If required orders can be reinstated using the Orders Module of the system.



1.14 View Order Locations

This allows the user to see collection and delivery addresses for the selected order, see below:

Location Details For 2091013

Collection From

Location Id

EXELSTAN

Address Line1

Shepherds Grove Ind Estate East

Address Line2

Stanton

Address Line3

Town

Bury St Edmunds

County

Suffolk

Postcode

IP31 2BG

Country Code

GB

Location Name

Stanton_DHLExel_IP31 2BG

Phone

Fax

View Address Details

Deliver To

Location Id

BOOKMELL

Address Line1

Booker Cash & Carry

Address Line2

5 Davy Close_Park Farm Indust

Address Line3

Town

Wellingborough

County

Northamptonshire

Postcode

NN8 6XX

Country Code

GB

Location Name

Wellingborough_Booker C&C_NN8 6XX

Phone

01933 372526

Fax

View Address Details

Exit

If you select the View Address Details button you get the following screen with increased address information:

Locations

LOCATION v2.71

Alt 1

ID

EXELSTAN

Active

Inactive

Name

Stanton_DHLExel_IP31 2BG

Lat

52.32375

Long

0.92349

Account Profile

Loading Rate

DEPOT LOAD

Unloading Rate

DEPOT UNLOAD

RDC

Control Tower

Mon-Thru

Fri

Postal Reg

IP

Planning Reg

Reg_5

Address

Constraints

Trailer Types

Contacts

DU Types

Address

Shepherds Grove Ind Estate East

Stanton

Town

Bury St Edmunds

County/Region

Suffolk

Postal Code

IP31 2BG

Country (ISO Code)

GB - United King

Cost Centre

Group Name

Delete

New Location

Save

Cancel

Close



2 Main Execution Screen

2.1 Header Menu

Shown below:



2.1.1 Depot Selection

Depending on a users access this field can be used to either see all orders they are permitted to view or they can select a particular depot to limit the amount of information displayed. The screen defaults to All Depots. When making changes the Run Query button will update what is displayed.

2.1.2 Date Range

This allows the user to select either a single schedule date or a date range to view. When opened the screen defaults to the current date. When making changes the Run Query button will update what is displayed.

2.1.3 Detail/Summary

Users have the choice of displaying information in Detail or Summary which can be selected in the drop down on the header menu. When making changes the Run Query button will update what is displayed.

Detail Mode will display one line for each order on a trip (see example on the following page).

Summary Mode will display the first order on each loaded leg of the trip (see example on the following page).

2.1.4 Detail

A screenshot of the Execution screen in Detail mode. The header bar is the same as in the previous image. Below the header, there is a table with columns: Schedule, Trip, Carrier, Driver, Tractor, Trailer Id, External Ref, From Loc, To Loc, Late Del, and Total RPE Ch. The table contains multiple rows of data, with the first row highlighted in yellow. At the bottom of the table, there are buttons for 'Show Marked', 'Clear Filters', and 'Layout: 1: JAME'. There is also a 'Show Unscheduled Orders' button on the right side of the table.

2.1.5 Summary (same trip displayed)

A screenshot of the Execution screen in Summary mode. The header bar is the same as in the previous image. Below the header, there is a table with columns: Schedule, Trip, Carrier, Driver, Tractor, Trailer Id, External Ref, From Loc, To Loc, Late Del, and Total RPE Ch. The table contains multiple rows of data, with the first row highlighted in yellow. At the bottom of the table, there are buttons for 'Show Marked', 'Clear Filters', and 'Layout: 1: JAME'. There is also a 'Show Unscheduled Orders' button on the right side of the table.

2.1.6 Close

Self Explanatory

2.1.7 Run Query

When changes are made to the selection options listed the Run Query button will refresh the information displayed. When changes are made to information in the Execution Screen selecting Run Query is required to display the most current information.

2.2 Screen Panes

The Execution Screen is split into two panes the information on the left hand pane is trip information and the right hand pane displays the associated order information.

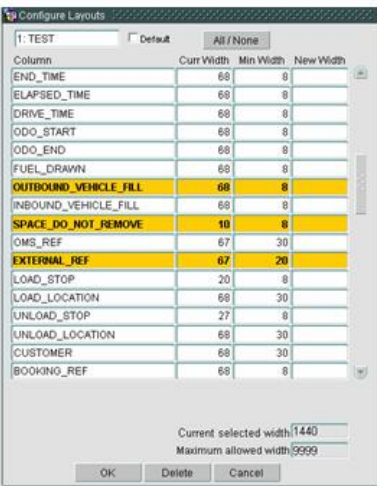


2.2.1 Configure Layout

The screen can be configured as in the Unscheduled Orders Pane (process described previously). To configure the layout right click over any column. Despite being displayed in two separate panes the layout is configured as a single block any field displayed above the SPACE_DO_NOT_REMOVE field (see below) will appear on the left hand trip pane any field displayed below the space field will appear on the right hand order pane.

Please note if you remove the SPACE_DO_NOT_REMOVE field the Order Pane will not display.

The choice of fields available is vast and should enable users to customise the display to suit their role specifically.



2.2.2 Layout Switch

Users can set up more than one layout which can be switched using the Layout drop down (see below).



2.3 Screen Panes Revisited

The Trip Pane on the left hand side of the screen displays Trip information the Order Pane on the right hand side of the screen displays Order information.



The Trip Pane scrolls independently of the Order Pane (and vice versa), each pane has its own scroll bar (see below) above the main screen scroll bar.



The scroll bars allow the information to be moved independently of the opposite pane (see examples below).

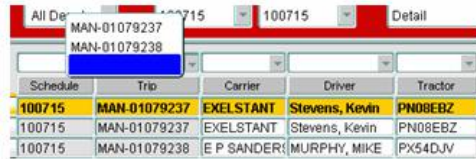


2.4 Screen Filters

Any columns which are displayed with a drop down box above them can be filtered. If there is no drop down arrow above the field it can not be filtered (see examples below).



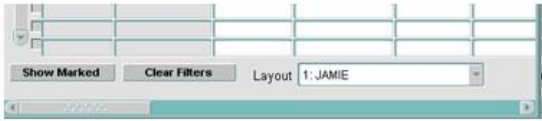
Selecting the drop down arrow will provide a choice records to filter by (see below).



More than one filter can be used simultaneously to allow further reduction of any data displayed.

Please note that when applying a second filter the choice of options to select will be based on the information displayed in the Header Menu and not the information remaining in the display.

Filters can either be individually removed by using the drop down arrow and selecting the blank field at the bottom of the menu or be removed simultaneously using the Clear Filters button in the bottom left of the screen (see below).



2.5 Screen Sorts

Data can be sorted alphanumerically or reverse alphanumerically by any column with a darker grey menu title, those with a lighter grey menu title do not have the functionality (see below).

Schedule	Trip	Carrier	Driver	Tractor	Trailer Id	To Loc	Late Del	Total RPE Qty	Total Weight	Ord Rev
100715	MAN-01079217	EXELSTANT	Stevens, Kevin	PNO8E6Z	DHL517	DURKODU	08:00	12	11000	211.68
100715	MAN-01079237	EXELSTANT	Stevens, Kevin	PNO8E6Z	DHL517	AFELGATE	11:00	12	10020	227.38
100715	MAN-01079238	E P SANDER	MURPHY, MIKE	PX54DJV	OWN	BOOKWELL	15:40	18	19253	358.64

Sorting Trip information will always keep the relevant trip information together (the only exception to this is if two trailer numbers are used on one trip).

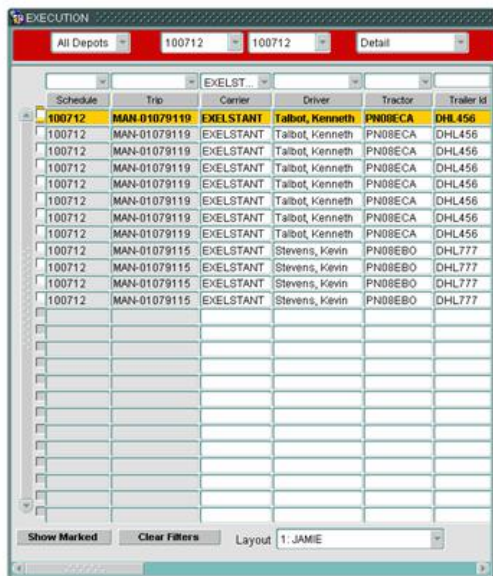
Sorting Trip information will allow users to move blank Carrier, Tractor, Driver or Trailer information to the top of the screen to show which still require allocating.

Please note that when sorting by any Order Detail Column (right hand pane) orders will be logically sorted and not be displayed in Trip groups.

2.6 Mark Trip

This allows user to see two or more trips together that may not be possible using the screen filters. To mark a trip select the white box at the far left of the display and then select the Show Marked button at the bottom left (see below). To clear the marked display use the Clear Filters button on the bottom left of the screen.





The screenshot shows the EXECUTION screen with a table of trip data. The table has columns for Schedule, Trip, Carrier, Driver, Tractor, and Trailer Id. The data is filtered for Depot 100712 and Carrier EXELST. The first row is highlighted in yellow.

Schedule	Trip	Carrier	Driver	Tractor	Trailer Id
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079119	EXELSTANT	Talbot, Kenneth	PN08ECA	DHL456
100712	MAN-01079115	EXELSTANT	Stevens, Kevin	PN08EBO	DHL777
100712	MAN-01079115	EXELSTANT	Stevens, Kevin	PN08EBO	DHL777
100712	MAN-01079115	EXELSTANT	Stevens, Kevin	PN08EBO	DHL777
100712	MAN-01079115	EXELSTANT	Stevens, Kevin	PN08EBO	DHL777

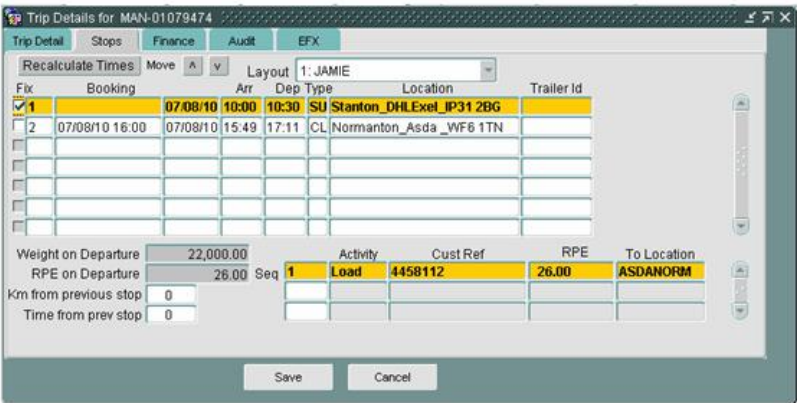
2.7 Right Click Functionality

Right click over either the Schedule or Trip columns gives the following menu:

- Show Trip Details
- Debrief Trip
- Apply Order
- Show Map
- Delete Trip
- Get Status
- Configure Layout

2.7.1 Show Trip Details

Opens the Trip Details Form (see below). This form replicates the functionality provided by the section at the bottom right of the Trip Planning Screen and the top right of the Trip Manipulation Screen, it is spilt into five tabs which can be seen below.



The screenshot shows the Trip Details form for trip MAN-01079474. The form has tabs for Trip Detail, Stops, Finance, Audit, and EFX. The Trip Detail tab is active, showing a table of trip stops. The first stop is highlighted in yellow.

Fix	Booking	Arr	Dep	Type	Location	Trailer Id
1	07/08/10 10:00	07/08/10 10:30	SU	Stanton_DHLExel_IP31 2BG		
2	07/08/10 16:00	07/08/10 15:49	CL	Normanton_Asda_WF6 1TN		

Weight on Departure: 22,000.00
RPE on Departure: 26.00
Km from previous stop: 0
Time from prev stop: 0

Activity: Load, Cust Ref: 4458112, RPE: 26.00, To Location: ASDANORM

Buttons: Save, Cancel

2.7.2 Debrief Trip

This provides a short cut to the Debrief Screen for the selected trip.

2.7.3 Apply Order

Described later



2.7.4 Delete Trip

This can be used to delete the selected trip, all orders on the trip will return to the Unscheduled Orders Well.

2.7.5 Set Status

This allows the update of trip status.

2.7.6 Resource Details

Right click over Carrier, Driver, Tractor or Trailer columns will give the following menu.



2.7.7 Edit Resources

Selecting Edit Resources opens the following window.

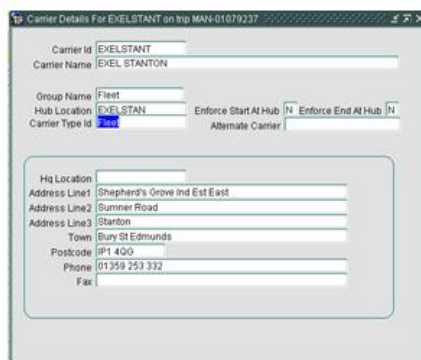


To allocate resources type into the relevant field and use the Tab key to move between fields. The Cancel button will ignore any changes made, the Save button will apply any details entered and the Remove All button will remove driver, tractor and trailer.

Resource allocation is dependent on whether or not a Carrier is set up as Free Text or Pop List. If a Carrier is set up as Free Text anything can be entered into the fields. If the Carrier is set up as Pop List the system will not allow the entry of a resource not set up in the Pop List. For Pop List entry users can either fully or partially type in an entry that will be accepted if valid or if it is invalid a list of available alternatives will be displayed to select, alternatively selecting the grey box at the end of the field will produce a list of available alternatives. Currently the Trailer field is set as Free Text for all carriers.

2.7.7.1 View Carrier Details

View Carrier Details will display details as below:



2.7.7.2 View Tractor Details

View Tractor Details will display details as below:



2.7.7.3 View Driver Details

View Driver Details will display details as below:

2.7.7.4 View Trailer Details

View Trailer Details will display details as below:

2.8 Right Click Functionality Order Pane

Right click over any field on the right hand Order Pane gives the following menu:

2.8.1 View Order Details

Selecting View Order Details will open the main Order details template for that order.

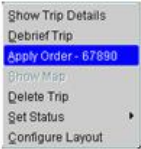
2.8.2 Move Order

Selecting Move Order will allow the option to select a single order to move between trips. Once selected the external reference field for the order will be highlighted in blue.

2.8.3 Apply Order

Right click over either the Schedule or Trip columns allows the order selected using the Move Order functionality to be applied to the selected trip. The customer order number for the selected order will be displayed against the Apply Order option (see below).





2.8.4 Unschedule Order

Selecting Unschedule Order will allow the option to remove an order from a trip and return it to the Unscheduled Orders Form (it will also display in the Trip Planning and Trip Manipulation screen order wells). If there is only one order on a trip and it is removed using this function the trip will still exist but not display in the Execution Screen (it will be visible in the Trip Planning and Trip Manipulation Screens), as an alternative the Delete Trip functionality is recommended to remove the last order from a trip.

2.8.5 View Order Locations

Selecting View Order Locations displays order address details. This is the same functionality as explained in the Unscheduled Orders Form.

2.8.6 View Trip Locations

If the screen is configured to show either Load or Unload location there is a right click option to view trip locations. For most orders order location and trip location will be the same but for a cross docked orders trip location will display the load and unload points of the order on that trip.

2.8.7 Carrier Cost Entry Short Cut

If carrier cost is zero; double clicking in either the Carrier Cost or Cost Column opens a new form shown below and allows a carrier cost to be entered.

Please note costs can only be applied using this short cut if there is no value in Carrier cost.

If Carrier costs have already been entered additional costs can be entered using the Trip Detail Tab.

2.8.8 Revenue, Carrier Cost, Cost and Profit Fields

Revenue, Carrier Cost, Cost and Profit fields show the totals for the trip duplicated against each line on the trip. The totals at the top of each column discount this duplication (see below).

The Order Revenue is displayed per order and there is only one line per order.

260.00	319.21	260.00	59.21	
Carrier Cost	Revenue	Cost	Profit	Ord Rev
260.00	319.21	260.00	59.21	84.92
260.00	319.21	260.00	59.21	68.09
260.00	319.21	260.00	59.21	41.83
260.00	319.21	260.00	59.21	56.62
260.00	319.21	260.00	59.21	67.75

On the example above you will notice the Carrier Cost and Cost columns display the same information.

Carrier Cost is any external Carrier charges applied to the trip. The Cost column shows the total costs for the Trip, in most cases Carrier Cost and Cost columns will display the same information as in the example above.



For Trips which have been Cross docked through an internal Consolidation Centre the figures may vary. The Carrier Cost column will display any carrier charges for the trunk leg of the trip and the Cost column will display the sum of those trunk costs and any internally charged tariff for the radial delivery. The radial delivery charges will not be calculated and displayed until the trip status is set to Accepted or beyond.

