

Order Templates

Aptean Ltd
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1 Order Templates

Templates are used when there is a degree of uniformity to the information being channeled through the C-TMS software. A template is effectively the same as an order only it can be saved and generated as many times as is required and the information contained within it amended or updated, it therefore works off days rather than dates.

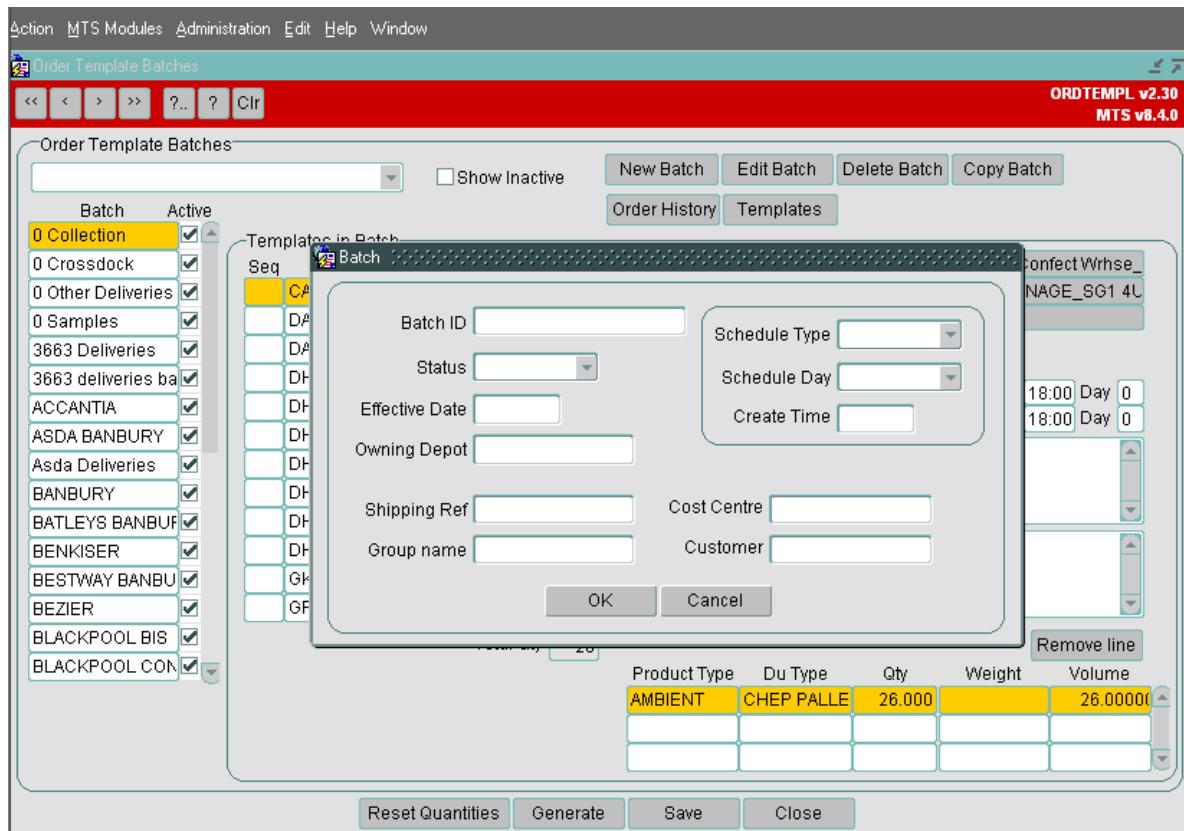
Order Templates can be created in C-TMS by selecting the Template option from the Order Management Menu.

An order template is a set of pre-configured information which can be used to pre-fill an order. An order template is therefore very similar in data content to an order, except in respect of the collection and delivery dates, which can be stored as an offset from a specified date. The screen which is used to create and edit order templates is therefore very similar to the order entry screen.



Templates can be used to create orders individually or, for larger volumes, templates can be added to a Batch and generated en masse. To create a batch click the **New Batch** button, this will take you into the screen shown below:





The batch should be given an easily distinguishable ID, identifying the use and usually the depot and day, for example "Depot1 Collections Thurs", something that will distinguish the batch from others. The status should be set to Active and the Effective Date set to the date on which the batch is being created. The Owning Depot can be assigned in order to use the top left hand drop down filter, this will show only batches assigned to the selected depot. The Shipping Ref, Group Name, Cost Centre and Customer will be applied to all orders generated from the batch unless specified differently on the template itself.

The Schedule Type, Schedule Day and Create Time are not required.

Once completed the **OK** button will save the batch and the **Cancel** button will exit to the previous screen.

To create a template, click on the **New** button and enter the Template name.



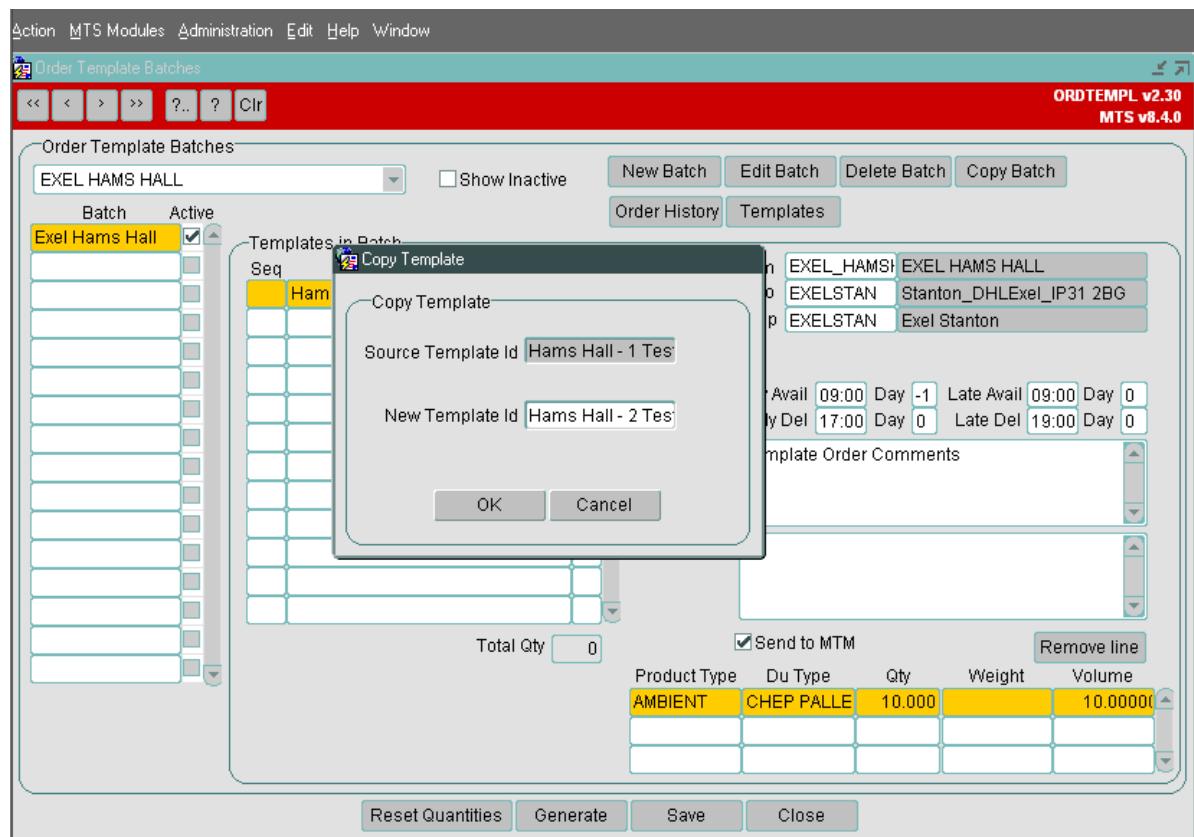
The rest of the information can be entered in this form in the same way as using the Order Details form; the only difference is that numbers are used to represent the day rather than a date. This number relates to the day on which the template or batch is being generated i.e. "0" would be the same day, "1" would be the day after and "-1" would be the day before, at the point orders are created these numbers become dates.

Once completed, click on the **Save** button for the Template to be saved. You can also **Edit** a template, but don't forget to click on the **Save** button to save the changes that you have made.

The **Copy** and **Remove** buttons allow you to copy templates (the copy will also appear in the Order Templates screen) or remove them from batches respectively.

To copy a template click **Copy** which will open the Copy Template window shown below:





Type in the New Template Id and then click **OK**. What this will do is copy the source template and creates a copy already in the batch.

To remove a Template from the Batch, select the template and click on the **Remove** button, which will prompt for a confirmation - click on the **OK** button to remove the Template from the batch.

If there are a number of templates in the batch and the sequence require changing then this can be done by using the **Re-order** button. Enter the desired sequence numbers in the Seq column, in this sequence the order of the templates will be reversed in the batch.

Once the new sequence has been entered click on the **Re-order** button. The order of the templates will be changed in line with the numerical values shown in the Seq column. Any templates having the same numerical value will be grouped together.

1.1 Use of Individual Order Template

In order to generate a batch i.e. create orders from the templates contained within it, you must first decide how many of each template are required; this figure is entered in the Qty column.

At any point these quantities can be reset to zero by selecting the **Reset Quantities** button. In the example shown below the order requirement is for "3" orders from template "Hams Hall - 1 Test", "1" order from template "Hams Hall - 3 Test" and "2" orders from template "Hams Hall - 5 Test":



The screenshot shows the 'Order Template Batches' screen. The main area displays a list of templates in a table with columns: Seq, Template, and Qty. Template 5 Hams Hall - 5 Test is selected and highlighted in yellow, showing a quantity of 2. To the right of the table, there is a detailed view of this template. The detailed view includes fields for 'From' (EXEL_HAMSH), 'To' (EXELSTAN), 'Group' (EXELSTAN), and 'Comments' (Template Order Comments). It also shows delivery and availability times: Early Avail 09:00 Day -1, Late Avail 09:00 Day 0, Early Del 17:00 Day 0, Late Del 19:00 Day 0. Below the detailed view is a table for 'Spec Instr' and a section for 'Send to MTM' with a checked checkbox. The 'Send to MTM' section includes columns for Product Type (AMBIENT), Du Type (CHEP PALLE), Qty (10.000), Weight, and Volume (10.0000). At the bottom of the screen are buttons for 'Reset Quantities', 'Generate', 'Save', and 'Close'.

Once the quantities have been set click on the **Generate** button, which will take you into the screen shown below where you select the schedule date on which the orders are to be generated:

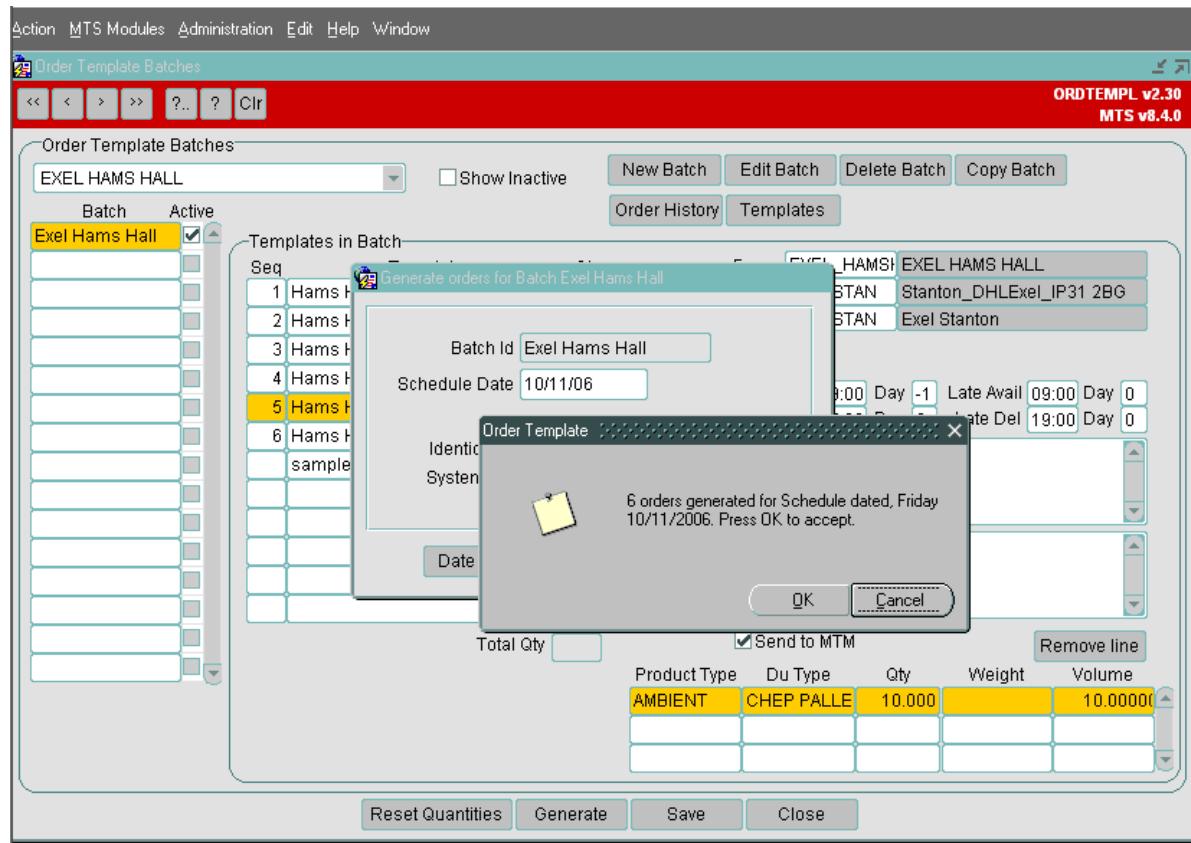
The screenshot shows the 'Order Template Batches' screen with a 'Generate orders for Batch Exel Hams Hall' dialog box open. The dialog box contains fields for 'Batch Id' (Exel Hams Hall) and 'Schedule Date' (10/11/06). It also has radio buttons for 'Identical schedule name for orders' (selected) and 'System schedule names for orders'. At the bottom of the dialog box are buttons for 'Date Stats', 'Generate', and 'Cancel'. The main screen below the dialog box shows the same template list and 'Send to MTM' section as the previous screenshot, with a 'Generate' button visible at the bottom.

From here you can also select whether or not to define the schedule name for the orders or allow the system to do it for you, in the example shown above the schedule that these orders will be applied to is 101106.



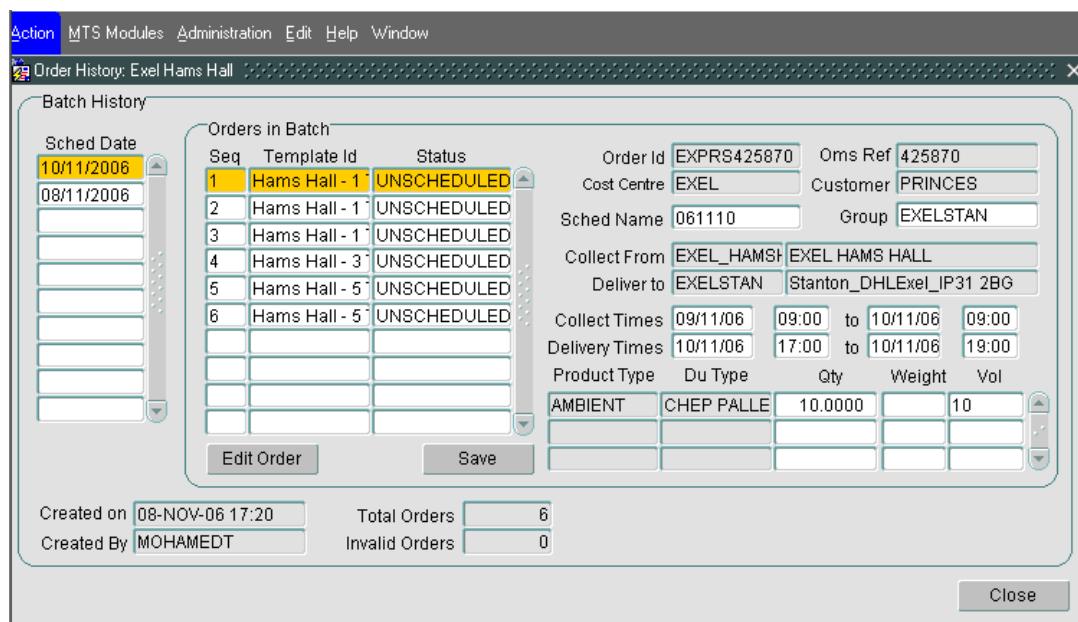
If "System schedule names for orders" had been selected each order would be considered in turn dependent on its earliest collection date and time.

The **Date Stats** button will show details of any orders already generated for the selected date and **Cancel** will take you back to the original Order Template Batches form. Click **Generate** to create orders and the message shown below will be displayed:



Here we can see that six orders are being generated for the specified schedule, looking back to what we specified in the batch it is clear that this is correct and therefore click **OK** to accept them

By clicking **OK** the below screen will appear. The details each order that has been generated from this batch by date, the orders can be viewed or the form exited via the **Close** button.



The **Reset Quantities** button will remove all positive values from the Qty column. It is best practice to use this before selecting templates to be generated if the number or required templates is dynamic rather than static. You will be asked for confirmation. Provided that this is what you wish to happen, click **OK - Cancel** will abort the process.

By clicking on the **Templates** button, the screen below will appear which will allow you to add an existing template to a batch. This screen can also be used to create/edit templates and you can also Create Order using the templates from here.

Order Templates											ORACLE
ORDTEMPL v2.30											MTS v8.4.0
Template Id	Cost Centre	Customer	ECT	EDT	From Location		To Location		Group Name	Created	Updated
3663READ BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	3663READ	Reading_3663 Rea		23-JUL-200	29-JUL-200
3663SALF			00:01	00:01	EXELLUT	Lutterwo_New Cont	3663SALF	Salford_3663 Salfor		04-MAY-200	04-MAY-2005
3663SALF BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	3663SALF	Salford_3663 Salfor		23-JUL-200	23-JUL-2005 1
3663SALI			00:01	00:01	EXELLUT	Lutterwo_New Cont	3663SALI	Salisbur_3663 Salis		04-MAY-200	04-MAY-2005
3663SALI BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	3663SALI	Salisbur_3663 Salis		23-JUL-200	23-JUL-2005 1
3663WORT			00:01	00:01	EXELBAN	Banbury_Banbury D	3663WORT	Worthing_3663 Wor		24-MAY-200	23-JUL-2005 1
3663WORT BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	3663WORT	Worthing_3663 Wor		23-JUL-200	23-JUL-2005 1
483	EXEL	GREENCORE	00:00	00:00	EXELBELI	Bellshill_Exel Bells	MORRSTC	Stockton_Morrisons		31-JUL-200	
661 Tesco Wel Green	EXEL	CAMPSIETES	23:59	23:59	EXELBELI	Bellshill_Exel Bells	TESCWEL	Welham Green_Tesco		25-SEP-200	
8.4 Test 01	COST CENTRE	CUSTOMER	02:00	12:00	DEPOTE0	Test Depot	CUSTTE0	CUSTOMER TEST 0		09-OCT-200	
8.4 Test 02	COST CENTRE	CUSTOMER	02:00	14:00	DEPOTE0	Test Depot	CUSTTE0	TEST CUSTOMER 0		09-OCT-200	
99pDaventry			00:01	00:01	EXELLUT	Lutterwo_New Cont	99P DAVE	DAVENTRY_99P ST		14-JUL-200	14-JUL-2006 1
A&J Blaby										15-FEB-200	
A&J CARTER BLABY					EXELLUT	Lutterwo_New Cont	AJCABLAE	Blaby_AJ Carter LE		15-FEB-200	22-FEB-2006 1
AAHPERR			00:01	00:01	EXELLUT	Lutterwo_New Cont	AAHPERF	Perry Ba_Aah Pharr		04-MAY-200	14-JUL-2006 1
AAHPERR BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	AAHPERF	Perry Ba_Aah Pharr		23-JUL-200	23-JUL-2005 0
ABBEY WELL MORPETH			07:00	00:01	WATENOF	Northumb_Water &	EXELBAW	Bawtry_Exel - Bawtr	EXELBAWT	27-SEP-200	08-MAY-2006
ACWAWEST			00:01	00:01	EXELLUT	Lutterwo_New Cont	ACWAWE	Ac Ward & Sons Ltd		04-MAY-200	11-JUL-2006 0
ACWAWEST BAN			00:01	00:01	EXELBAN	Banbury_Banbury D	ACWAWE	West Thu_A.C.Warc		23-JUL-200	23-JUL-2005 0
ADSA LUTT TO WHITWOO			00:00	00:00	ASDALUT	Lutterwo_Asda Smg	EXELWHT	Whitwood_Exel - Wt	EXELWHIT	02-MAR-200	01-JUN-2006

To add a template to a batch, select the template which you would like to add to the batch and click the **Add to Batch** button. A message window will appear and on confirmation the template will be added to the batch.

You can also Create Order from the Order Templates form. Select the template and then click on the **Create Order** button. This will open the Orders screen with details of the order created as per the template, where you can save or continue to edit the order.

1.2 User's Default Template

An Order template can be associated with a user, so that whenever that user creates a new order, it is automatically populated with information from that template.

