

Aptean

Orders - Order Template Batches Guide

Calidus TMS - 12.45

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Reference: ORDERS

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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.

The screenshot displays the 'Order Template Batches' window. On the left, a list of templates is shown with columns for 'Batch', 'Active', and 'Qty'. The 'AMIA COLL' template is highlighted. In the center, a table lists templates with columns for 'Seq', 'Template', and 'Qty'. The 'AMIAHAYD' template is selected. On the right, there are fields for 'From' (AMIAHAYD) and 'To' (EXELLUTT), and a 'Group' field. Below these are checkboxes for 'Show Inactive Locations' and 'Send to MTM'. At the bottom, a table shows product details for 'Confection' and 'CHEP PALLE' with columns for 'Product Type', 'Du Type', 'Qty', 'Weight', and 'Volume'.

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 screenshot shows the 'Order Template Batches' window. On the left, there is a list of batches with columns 'Batch' and 'Active'. The main area contains a form for editing a batch. The form has the following fields:

- Batch ID (text box)
- Status (dropdown menu)
- Effective Date (text box)
- Owning Depot (text box)
- Shipping Ref (text box)
- Group name (text box)
- Schedule Type (dropdown menu)
- Schedule Day (dropdown menu)
- Create Time (text box)
- Cost Centre (text box)
- Customer (text box)

At the bottom, there is a table of templates with the following columns: Product Type, Du Type, Qty, Weight, and Volume. The first row shows 'AMBIENT', 'CHEP PALLE', '26.000', '26.00000', and '26.00000'.

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.



Order Template Batches

EXEL HAMS HALL ☐ Show Inactive

New Batch Edit Batch Delete Batch Copy Batch

Order History Templates

Batch Active

Exel Hams Hall ☒

Templates in Batch

Seq	Template	Qty
1	Hams Hall - 1 Test	

Total Qty 0

From EXEL_HAMS EXEL HAMS HALL

To EXELSTAN Stanton_DHLExel_IP31 2BG

Group EXELSTAN Exel Stanton

New Re-order Copy Remove

Early Avail 09:00 Day -1 Late Avail 09:00 Day 0

Early Del 17:00 Day 0 Late Del 19:00 Day 0

Comments Template Order Comments

Spec Instr

☒ Send to MTM Remove line

Product Type	Du Type	Qty	Weight	Volume
AMBIENT	CHEP PALLE	10.000		10.00000

Reset Quantities Generate Save Close

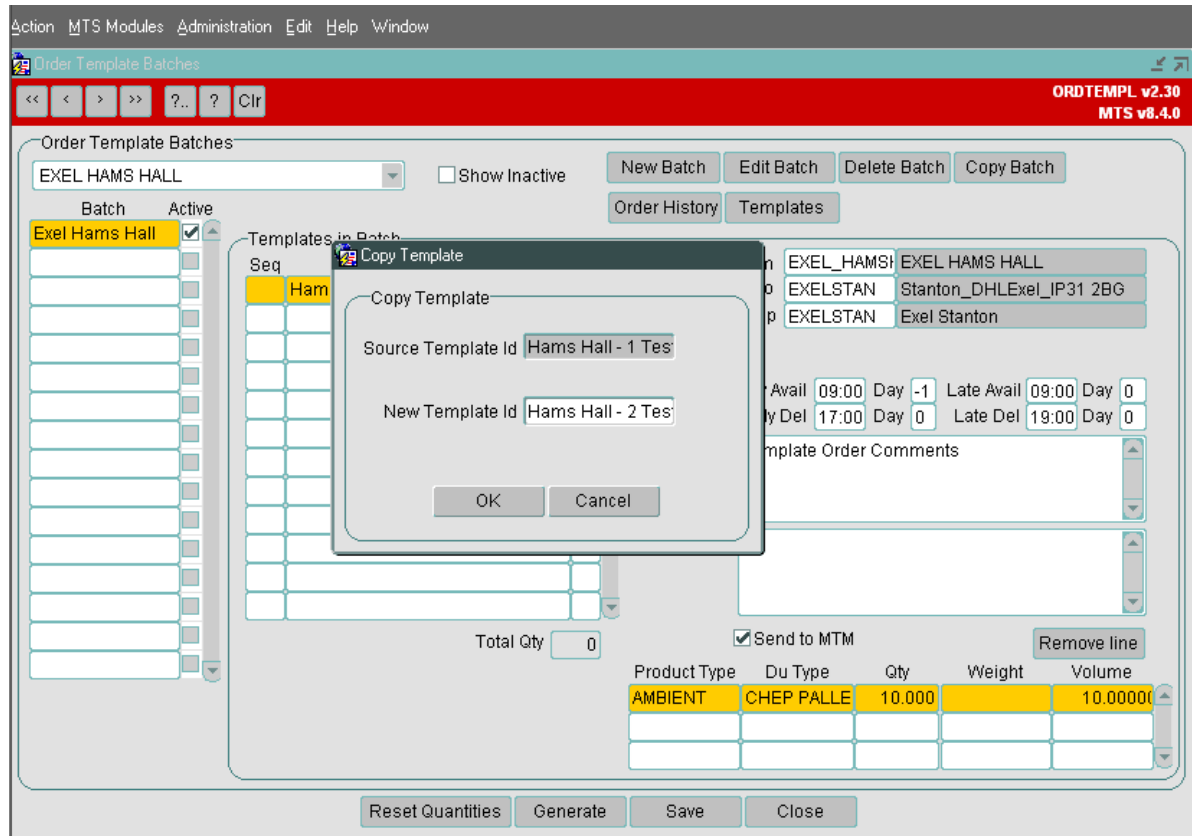
The rest of the information can be entered in this form in the same way as using the Order Details form; the only difference is that numbers are used to represent the day rather than a date. This number relates to the day on which the template or batch is being generated i.e. "0" would be the same day, "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":



Order Template Batches

EXEL HAMS HALL ☐ Show Inactive

New Batch Edit Batch Delete Batch Copy Batch

Order History Templates

Batch Active

Exel Hams Hall ☒

Templates in Batch

Seq	Template	Qty
1	Hams Hall - 4 Test	
2	Hams Hall - 1 Test	3
3	Hams Hall - 3 Test	1
4	Hams Hall - 6 Test	0
5	Hams Hall - 5 Test	2
6	Hams Hall - 2 Test	0

Total Qty

From EXEL_HAMS EXEL HAMS HALL

To EXELSTAN Stanton_DHLExel_IP31 2BG

Group EXELSTAN Exel Stanton

New Re-order Copy Remove

Early Avail 09:00 Day -1 Late Avail 09:00 Day 0

Early Del 17:00 Day 0 Late Del 19:00 Day 0

Comments Template Order Comments

Spec Instr

☒ Send to MTM Remove line

Product Type	Du Type	Qty	Weight	Volume
AMBIENT	CHEP PALLE	10.000		10.0000

Reset Quantities Generate Save 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:

Order Template Batches

EXEL HAMS HALL ☐ Show Inactive

New Batch Edit Batch Delete Batch Copy Batch

Order History Templates

Batch Active

Exel Hams Hall ☒

Templates in Batch

Seq

1 Hams Hall - 4 Test

2 Hams Hall - 1 Test

3 Hams Hall - 3 Test

4 Hams Hall - 6 Test

5 Hams Hall - 5 Test

6 Hams Hall - 2 Test

Total Qty

From EXEL_HAMS EXEL HAMS HALL

To EXELSTAN Stanton_DHLExel_IP31 2BG

Group EXELSTAN Exel Stanton

New Re-order Copy Remove

Early Avail 09:00 Day -1 Late Avail 09:00 Day 0

Early Del 17:00 Day 0 Late Del 19:00 Day 0

Comments Template Order Comments

Spec Instr

☒ Send to MTM Remove line

Product Type	Du Type	Qty	Weight	Volume
AMBIENT	CHEP PALLE	10.000		10.0000

Reset Quantities Generate Save Close

Generate orders for Batch Exel Hams Hall

Batch Id Exel Hams Hall

Schedule Date 10/11/06

Identical schedule name for orders ☒

System schedule names for orders ☐

Date Stats Generate Cancel

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:

Order Template Batches

Order Template Batches: EXEL HAMS HALL

Batch: Exel Hams Hall

Templates in Batch:

Seq	Template Id	Status
1	Hams Hall - 1	UNSCHEDULED
2	Hams Hall - 1	UNSCHEDULED
3	Hams Hall - 1	UNSCHEDULED
4	Hams Hall - 3	UNSCHEDULED
5	Hams Hall - 5	UNSCHEDULED
6	Hams Hall - 5	UNSCHEDULED

Generate orders for Batch Exel Hams Hall

Batch Id: Exel Hams Hall

Schedule Date: 10/11/06

Order Template

6 orders generated for Schedule dated, Friday 10/11/2006. Press OK to accept.

OK Cancel

Product Type: AMBIENT, Du Type: CHEP PALLE, Qty: 10.000, Weight: 10.0000, Volume: 10.0000

Reset Quantities Generate Save Close

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.

Order History: Exel Hams Hall

Batch History

Sched Date: 10/11/2006

Orders in Batch:

Seq	Template Id	Status
1	Hams Hall - 1	UNSCHEDULED
2	Hams Hall - 1	UNSCHEDULED
3	Hams Hall - 1	UNSCHEDULED
4	Hams Hall - 3	UNSCHEDULED
5	Hams Hall - 5	UNSCHEDULED
6	Hams Hall - 5	UNSCHEDULED

Order Id: EXPRS425870, Oms Ref: 425870

Cost Centre: EXEL, Customer: PRINCES

Sched Name: 061110, Group: EXELSTAN

Collect From: EXEL_HAMS, EXEL HAMS HALL

Deliver to: EXELSTAN, Stanton_DHLExel_IP31 2BG

Collect Times: 09/11/06 09:00 to 10/11/06 09:00

Delivery Times: 10/11/06 17:00 to 10/11/06 19:00

Product Type: AMBIENT, Du Type: CHEP PALLE, Qty: 10.0000, Weight: 10, Vol: 10

Edit Order Save

Created on: 08-NOV-06 17:20, Total Orders: 6

Created By: MOHAMEDT, Invalid Orders: 0

Close



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.

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	3663REAL Reading_3663 Rea		23-JUL-200	29-JUL-200
3663SALF			00:01	00:01	EXELLUT Lutterwo_New Conf	3663SALF Salford_3663 Salfor		04-MAY-20C	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 Conf	3663SALI Salisbur_3663 Salis		04-MAY-20C	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	3663WOR Worthing_3663 Wor		24-MAY-20C	23-JUL-2005 1
3663WORT BAN			00:01	00:01	EXELBAN Banbury_Banbury D	3663WOR Worthing_3663 Wor		23-JUL-200	23-JUL-2005 1
483	EXEL	GREENCORE	00:00	00:00	EXELBEL Bellshill_Excel Bellst	MORRSTC Stockton_Morrisons		31-JUL-200	
661 Tesc Wel Green	EXEL	CAMPSIETES	23:59	23:59	EXELBEL Bellshill_Excel Bellst	TESCWEL Welham Green_Tes		25-SEP-20C	
8.4 Test 01	COST CENTRE	CUSTOMER	02:00	12:00	DEPOTE0 Test Depot	CUSTTE0 CUSTOMER TEST C		09-OCT-20C	
8.4 Test 02	COST CENTRE	CUSTOMER	02:00	14:00	DEPOTE0 Test Depot	CUSTTE0 TEST CUSTOMER C		09-OCT-20C	
99pDavertry			00:01	00:01	EXELLUT Lutterwo_New Conf	99P DAVE DAVENTRY_99P ST		14-JUL-200	14-JUL-2006 1
A&J Blaby								15-FEB-20C	
A&J CARTER BLABY					EXELLUT Lutterwo_New Conf	AJCABLA Blaby_AJ Carter_LE		15-FEB-20C	22-FEB-2006 1
AAHPERR			00:01	00:01	EXELLUT Lutterwo_New Conf	AAHPERR Perry Ba_Aah Pharr		04-MAY-20C	14-JUL-2006 1
AAHPERR BAN			00:01	00:01	EXELBAN Banbury_Banbury D	AAHPERR Perry Ba_Aah Pharr		23-JUL-200	23-JUL-2005 0
ABBAY WELL MORPETH			07:00	00:01	WATENOF Northumb_Water &	EXELBAW Bawtry_Excel - Bawtr	EXELBAWT	27-SEP-20C	08-MAY-2006
ACWAWEST			00:01	00:01	EXELLUT Lutterwo_New Conf	ACWAWE Ac Ward & Sons Ltd		04-MAY-20C	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 Smc	EXELWHI Whitwood_Excel - Wh	EXELWHIT	02-MAR-20C	01-JUN-2006 1

Add to Batch New Templ Edit Templ Delete Te... Create Order Date 08/11/06 Close

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.

