



Aptean

Order Management User Guide

Calidus TMS - 12.48

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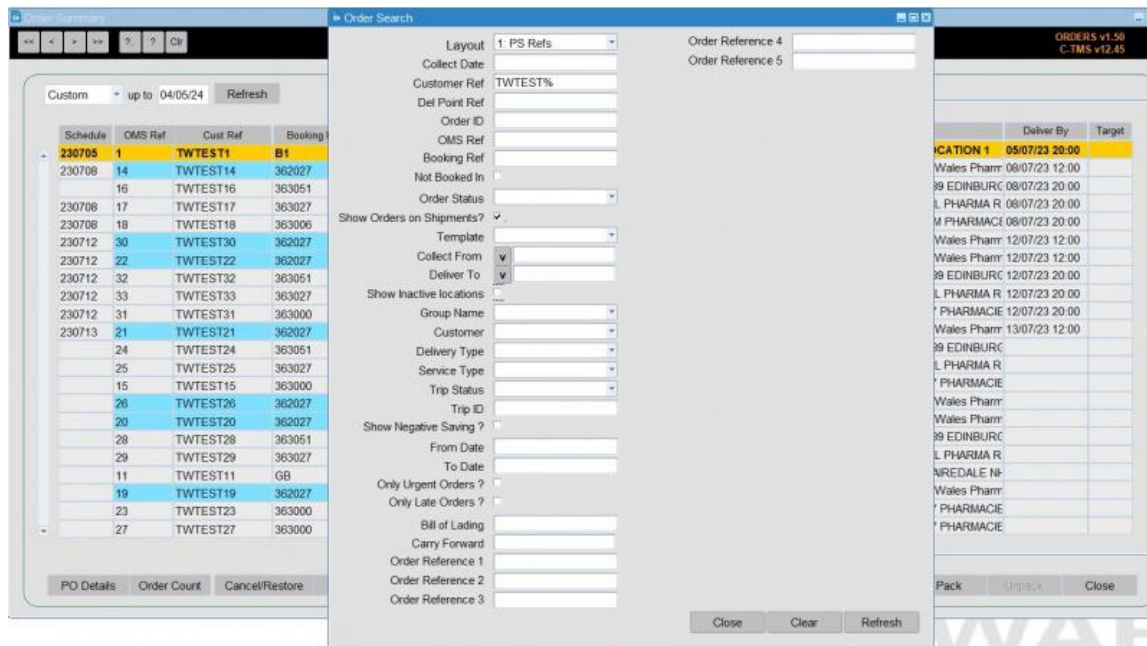
1 New Order

Orders, or Transport Instructions, can be created, modified, viewed and deleted from the Order Management module.

This is invoked by selecting *Orders* or *New Order* from the main menu.

 **Note:** The New Order screen is covered here in detail. The old *Orders* screen is no longer developed, but contains extremely similar information, but much more compact.

Upon selection, the primary Order Summary screen will open, accompanied by the "Order Search" screen:



The screenshot shows the 'Order Search' window with a list of orders on the left and search filters on the right. The list includes columns for Schedule, OMS Ref, Cust Ref, and Booking. The search filters include fields for Order Reference 4 and 5, Customer Ref, Del Point Ref, Order ID, OMS Ref, Booking Ref, Not Booked In, Order Status, Show Orders on Shipments?, Template, Collect From, Deliver To, Show Inactive locations, Group Name, Customer, Delivery Type, Service Type, Trip Status, Trip ID, Show Negative Saving?, From Date, To Date, Only Urgent Orders?, Only Late Orders?, Bill of Lading, Carry Forward, Order Reference 1, 2, and 3. The 'Refresh' button is highlighted in red.

Schedule	OMS Ref	Cust Ref	Booking
230705	1	TWTEST1	B1
230708	14	TWTEST14	362027
	16	TWTEST16	363051
230708	17	TWTEST17	363027
230708	18	TWTEST18	363006
230712	30	TWTEST30	362027
230712	22	TWTEST22	362027
230712	32	TWTEST32	363051
230712	33	TWTEST33	363027
230712	31	TWTEST31	363000
230713	21	TWTEST21	362027
	24	TWTEST24	363051
	25	TWTEST25	363027
	15	TWTEST15	363000
	26	TWTEST26	362027
	20	TWTEST20	362027
	28	TWTEST28	363051
	29	TWTEST29	363027
	11	TWTEST11	GB
	19	TWTEST19	362027
	23	TWTEST23	363000
	27	TWTEST27	363000

1.1 Order Search

The "Order Search" screen enables you to query orders by a variety of criteria that can be made as specific as required. For example, by only entering the schedule date, the query will extract all orders for that schedule currently within the C-TMS software. Once data has been entered or changed, it is highlighted in red, as are the **Refresh** buttons on both forms.

The Orders Search panel can be configured to your needs by right-clicking on the orders results and selecting *Configure Search Criteria*. This allows you to select criteria. Note that any order sub-references (*Additional References*) configured in the system will also be listed and can be selected as search criteria. See [Search by Additional References](#) below for more details on this function.

Clicking the **Refresh** button executes the query and populates the Order Summary screen. An example of how these queries extract data is shown below, where only those orders in a status of "SCHEDULED" on the schedule of "061026" are shown:



Schedule	OMS Ref	Cost Ref	Booking Ref	Status	Type	Collect	Ready At	Deliver	Deliver By	Target
230705	1	TWTEST1	B1	UNSCHEDULED	Standard	PDRLOC1	05/07/23 16:00	T001	TEST LOCATION 1	05/07/23 20:00
230708	14	TWTEST14	362027	UNSCHEDULED	S12	LBZ	07/07/23 00:00	Pn1633	Prince of Wales Pharm	08/07/23 12:00
	16	TWTEST16	363051	INVALID	S24	LBZ	Site 3	2	BUKL 6089 EDINBURG	08/07/23 20:00
	17	TWTEST17	363027	INVALID	S24	LBZ	Site 3	3	VERTICAL PHARMA R	08/07/23 20:00
	18	TWTEST18	363006	INVALID	S24	LBZ	Site 3	4	QUANTUM PHARMACE	08/07/23 20:00
	30	TWTEST30	362027	UNSCHEDULED	S12	LBZ	Site 3	11/07/23 09:00	Pn1633	Prince of Wales Pharm
	22	TWTEST22	362027	CANCELLED	S12	LBZ	Site 3	11/07/23 09:00	Pn1633	Prince of Wales Pharm
	32	TWTEST32	363051	CANCELLED	S24	LBZ	Site 3	2	BUKL 6089 EDINBURG	12/07/23 20:00
	33	TWTEST33	363027	CANCELLED	S24	LBZ	Site 3	3	VERTICAL PHARMA R	12/07/23 20:00
	31	TWTEST31	363000	CANCELLED	S24	LBZ	Site 3	1	FAIRWAY PHARMACE	12/07/23 20:00
	21	TWTEST21	362027	SCHEDULED	S12	LBZ	Site 3	11/07/23 09:00	Pn1633	Prince of Wales Pharm
	24	TWTEST24	363051	INVALID	S24	LBZ	Site 3	2	BUKL 6089 EDINBURG	13/07/23 12:00
	25	TWTEST25	363027	INVALID	S24	LBZ	Site 3	3	VERTICAL PHARMA R	
	15	TWTEST15	363000	INVALID	S24	LBZ	Site 3	1	FAIRWAY PHARMACE	
	26	TWTEST26	362027	INVALID	S12	LBZ	Site 3	Pn1633	Prince of Wales Pharm	
	20	TWTEST20	362027	INVALID	S12	LBZ	Site 3	11/07/23 09:00	Pn1633	Prince of Wales Pharm
	28	TWTEST28	363051	INVALID	S24	LBZ	Site 3	2	BUKL 6089 EDINBURG	
	29	TWTEST29	363027	INVALID	S24	LBZ	Site 3	3	VERTICAL PHARMA R	
	11	TWTEST11	GB	INVALID	S24	LBZ	Site 3	NHS1632	NHS003-AIREDALE NH	
	19	TWTEST19	362027	INVALID	S12	LBZ	Site 3	11/07/23 09:00	Pn1633	Prince of Wales Pharm
	23	TWTEST23	363000	INVALID	S24	LBZ	Site 3	11/07/23 09:00	1	FAIRWAY PHARMACE
	27	TWTEST27	363000	INVALID	S24	LBZ	Site 3	1	FAIRWAY PHARMACE	

1.1.1 Search by Additional References

Additional order sub-references can be defined in the **Imports** screen, on the **Decodes** tab. The decode table "XML_REFERENCES" of type "REFERENCE" is used for this.

Once these are created, an order sub-reference can be added to orders using the **Add Details** tab, as seen below.

Any sub-references will be listed in the available search criteria shown when configuring this search panel by right-clicking on the orders results and selecting **Configure Search Criteria**. You can select them and they will then be available for you to search by.

When using them, you can use them to search in conjunction with any other search criteria specified in the panel.

For example, if there were an Order sub-reference "CARRIER_REFERENCE" (labelled as "Carrier Ref") that could be added to orders, then you could search as follows:

- To find the exact carrier reference "SR12345678", click on the *Carrier Ref* entry field and enter "SR12345678".
- To find any carrier reference beginning with "SR", click on the *Carrier Ref* entry field and enter "SR%".
- To find any carrier reference ending in "12345678", click on the *Carrier Ref* entry field and enter "%12345678".
- To find any carrier reference that contains "2345", click on the *Carrier Ref* entry field and enter "%2345%".
- To find any order that has any carrier reference at all, click on the *Carrier Ref* entry field and enter "%".

Note: No orders without the sub-reference will be shown in any of the cases.

This is explicitly very useful when using rebooking, and there are orders that require rebooking that the system has automatically tagged for you (REBOOK_REQUIRED sub-reference, set to "Y"). In this case:

- An order may not have a REBOOK_REQUIRED sub-reference, meaning it does not require rebooking.
- An order may have a REBOOK_REQUIRED sub-reference set to "Y", meaning it requires rebooking.
- An order may have a REBOOK_REQUIRED sub-reference set to "N", meaning it has already been rebooked.

So you can use the Rebook Required sub-reference search as follows:

- To find any orders that requires rebooking, click on the *Rebook Required* entry field and enter "Y".
- To find any orders that have already been rebooked, click on the *Rebook Required* entry field and enter "N".
- To find any orders that at any point required rebooking, click on the *Rebook Required* entry field and enter "%".

Note: No orders without the sub-reference will be shown in any of the cases.

In both of these use cases, you can combine this with other criteria, such as Schedule, to further limit the results.



1.1.2 Search Layouts

When you select the criteria that you want to use when searching, you can save those search criteria with a name, so that you can re-use it again and again. This is especially useful to ease training in certain processes.

In the example above, we know that it is fairly easy to find all rebook orders in the system. The operational process might be to find all orders that require rebooking at the end of the day and check that they have been planned, or to find particular rebook orders for depots, carriers, days, etc.

So, you may create a Search layout called "Rebooks", including ONLY those fields that you would commonly use on this process, for example:

- *Schedule*
- *Rebook Required*
- *Rebook Order* - the original order reference
- *Group Name* - the planning group, your depot.

That way, when you want to search for rebook orders in any of the use cases above, you can select the "Rebooks" layout, and be presented only with the search criteria that is important to you in this use case.

Carrying that forward, here's examples of further use cases:

The image displays four screenshots of the 'Order Search' dialog box, illustrating different search layouts:

- Top Screenshot:** Shows the 'Order Search' dialog with the 'Layout' dropdown set to '4: All Orders'. The 'Schedule' field is populated with '250821'. Other fields like 'Customer Ref', 'Del Point Ref', 'OMS Ref', 'Booking Ref', 'Order Status', 'Collect From', 'Deliver To', 'Cost Centre', 'Group Name', 'Customer', 'Delivery Type', 'Service Type', 'From Date', 'To Date', 'Only Urgent Orders?', 'Only Late Orders?', 'Postcode', 'Rebook Required', 'Customer PO Ref', 'Rebook Count', 'Rebook Cust Ref', 'Rebook Order', and 'Run Number' are visible. Buttons for 'Close', 'Clear', and 'Refresh' are at the bottom.
- Bottom Left Screenshot:** Shows the 'Order Search' dialog with the 'Layout' dropdown set to '1: Invalid Orders'. The 'Schedule' field is populated with '250821'. Buttons for 'Close', 'Clear', and 'Refresh' are at the bottom.
- Bottom Middle Screenshot:** Shows the 'Order Search' dialog with the 'Layout' dropdown set to '2: Trunks'. The 'Schedule' field is populated with '250821'. Buttons for 'Close', 'Clear', and 'Refresh' are at the bottom.
- Bottom Right Screenshot:** Shows the 'Order Search' dialog with the 'Layout' dropdown set to '3: Rebooks'. The 'Schedule' field is populated with '250821'. The 'Rebook Required' field is populated with 'N'. Buttons for 'Close', 'Clear', and 'Refresh' are at the bottom.



1.2 Order Summary

The screen displays the core data on the left of the screen, plus a tabbed list of different additional details in a tabbed display on the right of the screen.

- **Core data** - this displays the schedule on which the order should be planned, the customer reference, the current order status and the delivery type.
- **Locations** - this displays location-based information: Collect location ID and name, Collection Ready At date and time, Deliver location ID and name, Deliver By date and time. The target will generally be blank, as this is used to show the target time of the order delivery window, but is now redundant.
- **Totals** - this shows Planned weight, volume, DUs and Units as well as any Actual data that has been entered on the order. The totals for the data selection are displayed on the bottom line, which has a grey background.
- **Finance** - The Revenue, Cost, Base Cost and Allocated Cost are populated directly from the order. The Margin is calculated from Profit divided by Revenue multiplied by 100 ($\text{Margin} = \text{Profit} / \text{Revenue} \times 100$). The Profit is calculated by subtracting the Allocated Cost from the Revenue ($\text{Profit} = \text{Revenue} - \text{Allocated Cost}$). Note that a number of totals are again shown at the bottom of the form.
- **Comments** - this shows all lane and order comments, and also the Group that the order belongs to - this corresponds with the Group Name field on the order itself.

All fields are populated with data from the "Order Details" form, and therefore blank fields indicate missing data from the order.

Once the Order Summary form has been populated, the order(s) can be viewed and edited as required and also sorted by the column headers as required (this is done by clicking on the column header by which you wish to sort).

Other options available from buttons on this screen:

- **PO Details.**
- **Order Count** - This button totals the number of orders shown in the current Order Search range. This is particularly useful for calculating averages in conjunction with data from the "Totals" and "Finance" tabs.
- **Cancel/Restore** - Orders can also be cancelled from this screen by using the **Cancel/Restore** button, with the benefit of being able to be restored if required.  **Note:** When cancelled, the order is set to CANCELLED status - if the order was already planned onto any trips (status SCHEDULED, SCHED_COL, SCHED_DEL), it will be automatically removed from those trips. If the order is restored, the order will return to UNSCHEDULED status.
- **Search** - re-show the order search pop-up form.
- **New** - create a new order. See "Creating a new order" below.
- **Edit** - view an existing order for editing. You can also edit or view an existing order by double-clicking the order in the list. See "Order Details" below.
- **View** - view an existing order. You can also edit or view an existing order by double-clicking the order in the list.
- **View Trip** - This button shows the trips on which the order has been planned in the "Trip Debrief" form.  **Note:** Orders in a status of ABORTED, CANCELLED, INVALID and UNSCHEDULED will not have any trip details, as they are not scheduled onto a trip.
- **View POD.**
- **Re-Book** - see "Re-booking Orders" below.
- **Print Label.**
- **Pack.**
- **Unpack.**
- **Close** - close the form.

Options available from right-clicking an order on this screen:

- **Edit** - view an existing order for editing. You can also edit or view an existing order by double-clicking the order in the list.
- **Send to Paragon** - required only if using a manual Paragon interface, and not required when not using Paragon or using the seamless Paragon API.
- **Show Trips** - show all trips for the order selected.
- **Show Shipment** - show all shipments for the order selected.
- **Revenue.**
- **Payments.**
- **Check Status.**
- **Reset NEW.**
- **Abort.**



- **Schedule** - you can use this to quickly add an order to a trip across schedules. When you select this option, you will be shown a list of all trips that the order can be scheduled on - select one and confirm with the **OK** button, or cancel the scheduling with the **Cancel** button. Like any lookup, you can also find and filter the data shown here.
- **X-Dock** - See "Cross Docking" below
- **Unschedule**.
- **Unschedule Order from Trips**.
- **Configure Search Criteria** - as described above.
- **Split Orders** - split the order. You will be prompted through a pop-up how many orders you would like. You can process the split with the **Process** button or any other button to exit. This works only when splitting pallet orders. To split an item order, do this by editing the order, then using the Split functions in the Order Items tab.
- **Copy Orders** - copy the order. You will be prompted for the number of orders and the new orders' collection and delivery windows. You can process the copy with the **Process** button or any other button to exit.
- **Set Order to On-Hold/Release from Hold** - set or unset the order status to ON HOLD

Click on the **New** button on the Order Summary screen to start entering a new order manually. Then you can start entering order details through the tabs below.

You can edit an existing order once found on the screen using the tabs below in exactly the same way.

When creating, viewing or editing an order, the "Order Details" form shown below will open.

1.3 Order Details

Order Details will open, showing the Details tab initially. For a new order, this is where you will be required to enter most of the initial information required to create the order.

The various tabs are covered below.

1.3.1 Details

New orders will be partly populated by defaults set up against the user; the "Cost Centre", "Customer", "Product Type" and "Qty" may be predetermined.

In the absence of defaults set against the user, defaults from the System Parameters will be used, although this will only apply to the "Cost Centre" and "Customer".



Each time a new order is created, the "OMS Ref" is populated by default with the next numerically sequenced number, and the status will default to "INVALID".

The "Cost Centre" and "Customer" fields must be populated. The "Schedule" field can be populated manually if the schedule already exists. If it does not exist, however, this field should be left blank, and the application will calculate the schedule from the collection and delivery windows. Attempting to enter a schedule that does not exist will result in a drop-down menu of existing schedules being presented.

 **Note:** The Schedule is calculated from the earliest collection date and time or the latest delivery date and time, depending on the setting of a system parameter. Therefore, if an order crosses schedules (typically midnight), you may need to check that the schedule is correct and as required.

The "Delivery Type" is either specified against a user ID or from a System Parameter - it can also be changed manually.

"Vehicle Type" may be set to limit the vehicle types (trailers) that can be used for this order.

"Carrier" can be used to set an expectation of which carrier should be used for the order.

"Temp Combo" can be set to determine the compartment type that can be used for the order.

"Booking Ref", "Customer Ref", and "Del Point Ref" can be added as required and are available regardless of which tab you have selected.

The required location should be selected either by double-clicking with the mouse or by highlighting and left-clicking on the **OK** button. This will then populate the field on the "Order Details" form. The "Deliver To" location can be populated in the same way, and then the time windows entered manually, date first and then time.

Note that for orders driven by a delivery time, the latest collection time should always be the same as the latest delivery time. For orders driven by the collection time, the earliest delivery time should always be the same as the earliest collection time.

Rather than key in four dates and times, there is also functionality that allows the time windows to be created either by the target collection or target delivery time. Select the *Delivery Time Target* option, and this will grey out all of the fields apart from the *Target* fields to the left of it. Click **Save**, and the collection and delivery windows will automatically be populated.

When saving, you may see a validation message, which generally states that the earliest collection time for the order is already in the past. This is a sense-check and, provided there is no issue with this, click **OK**: The order time windows will then be populated by the pre-set values associated with the location types, as shown in a later section. The "Collection Time Target" works in a similar way, by creating the windows from the Target collection time, rather than delivery. You will notice that the order status also changes to "UNSCHEDULED" as all of the required details have been entered and the "Schedule" has been automatically populated. It should be noted that this is calculated from the earliest collection date and time, and therefore, if an order crosses midnight, you may need to check that the schedule is correct and as required.

A number of additional checkboxes are also present and can be edited:

- *Show Inactive Locations.*
- Auto-processed flags - show whether the order has been through and been scheduled by a scheduling engine process. When ticked, these orders will not be processed again. Untick them to send the order back through the indicated process.
 - ◆ *Auto-processed PCL.*
 - ◆ *Auto Processed 3PL.*
 - ◆ *Auto Processed WS.*
 - ◆ *Manual Schedule.*
- *Hazardous.*
- *Quality Control.*
- *ADR Regs.*
- *Late Order.*
- *Manual Order.*
- *Urgent Order.*
- *Van Fleet.*

General order comments can be entered here.

You can enter lines - summaries of product types and DUs to be collected or delivered with this order.



If the product type is not set up to populate automatically, it can be selected in the same way as the other data, but the "DU Type" will populate automatically with the default value associated with the product - this can be over-typed if required.

"Weight", "Volume" and "RPE" will be calculated automatically from defaults set against the product and DU types. Therefore, only the "Qty" (Quantity) value needs to be entered. The totals for all lines are displayed at the bottom, to prevent excessive volume being placed on a single order.

The "Special Flag" field can be used to represent particular classes of order, such as "Advance" or "Left Off" - this will be populated automatically if the "Booking Entry" form has been used to create the order.

In general, entry of details on this tab will result in an order that can be scheduled. However, your operation may require more information, or be using a different order profile (for example, service levels, specific order items, etc), so additional information may be entered through the following tabs.

1.3.2 Order Items

All order items are shown for the order. This layout is configurable.

The screenshot displays the 'Order details for 21' interface. At the top, there's a header bar with 'Status: SCHEDULED' and 'Orms Ref: 21'. Below this, a navigation bar includes tabs like 'Detail', 'Order Items', 'Location Details', 'Add Detail', 'MTM Info', 'Audit', 'Audit Archive', 'Finance', 'Non Conformance', 'Payments', 'Storage', 'Trip Detail', 'Hazardous Data', and 'White Glove'. The 'Order Items' tab is active, showing a table with columns: Identifier, Product, Aka Code, Item Description, Factor, Lifts, Stack, Ordered, To Deliver, Delivered, Diff, Weight, Volume, and Location. The first row shows 'CLT91454/1' for 'AMBIENT' products. To the right of the table are buttons for 'Show Long Description', 'Split Order for Items' (with 'All' and 'None' radio buttons), 'Create', and 'Edit/Delete'. Below the table is a 'Reason' section with columns for Reason, Description, Reason Comments, Qty, Depot, Scan Type, and Created Date. At the bottom, there's an 'Item Content' section with columns for Item Identifier, Type, Item, Description, AKA Code, and Qty. The interface also includes a 'Layout' dropdown and a bottom bar with buttons like 'Print Label', 'New Order', 'View Info', 'Save', 'Close', 'Re-book', 'Send Ord Msg', 'Non Conformance', 'Pack', and 'Unpack'.

Actions available:

- **Show Long Description** - shown in a pop-up window.
- **Split order for Items** - you can split the item to a new order.
- **Create** - the screen will show a pop-up window to enter item details.
- **Edit/Delete** - the screen will show a pop-up window to edit item details or to delete the item.

When editing or creating items, the screen will show and allow you to enter or amend the following data, if configured to allow this in your access control group:

- Item Identifier.
- Transport Unit information if palletised - ID, Type.
- Product.
- DU Type.
- AKA Code.
- Pallet ID.
- Item Description.
- Pallet information - Factor/Lifts/Stack.
- Quantities - Ordered/To Deliver/Delivered.
- Package information - Units/Pack Quantity.
- WCS Loc.
- Dims - Weight, Volume, Length/Width/Height.
- Item Price.



 Note:

- You can split a total quantity of selected items onto a new split order. You cannot use this functionality to split an item into a split order - you must achieve that manually, by creating your own new transport order for the split, and then manually changing the quantities on the existing order.
- When splitting, any split transport order created will have the customer reference appended with "_S1", indicating a split. This will likely impact communications between CTM and any externally connected systems.

For each item selected, the screen shows a history of actions against that item in the table below.

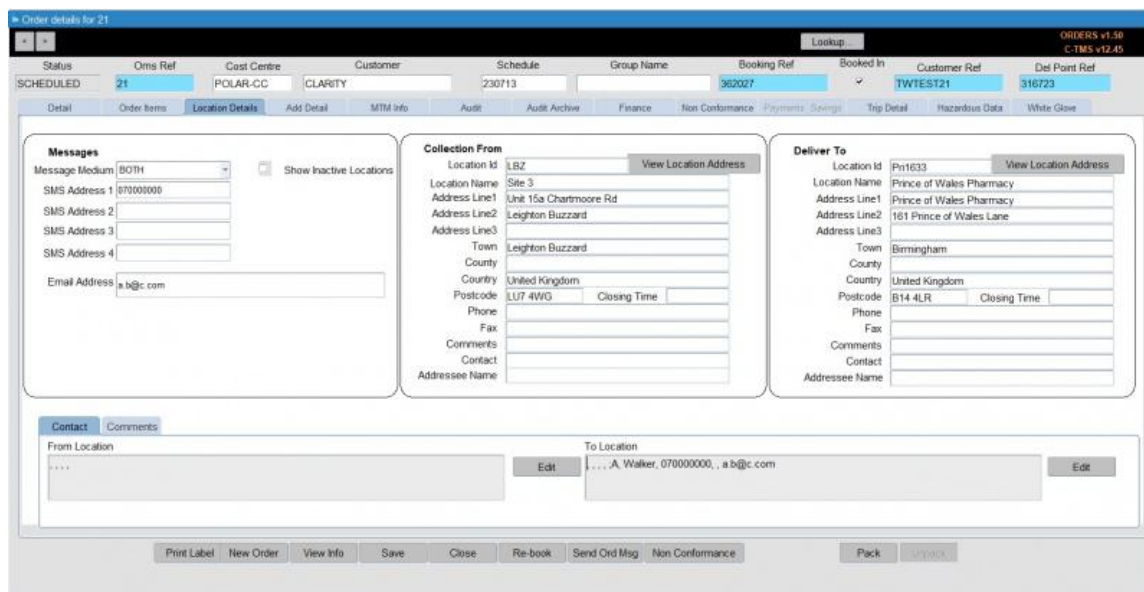
Actions available:

- **Create** - the screen will show a pop-up window to enter item history details.
- **Edit/Delete** - the screen will show a pop-up window to edit item history details or to delete the item history.

For each item selected, the screen shows any content against that item in the table below.

- **Show Long Description** - shown in a pop-up window.
- **Create** - the screen will show a pop-up window to enter item content details.
- **Edit/Delete** - the screen will show a pop-up window to edit item content details or to delete the item content.

1.3.3 Location Details



This screen shows

- Message medium - you can enter or view any SMS or email details against the order, and select how messages are sent to the contact (SMS, EMAIL, BOTH, NONE).
- Locations - the from and to locations are shown for the order. You can view all the details of the location itself with the **View Location Address** buttons provided.
- Contacts - the Contacts tab shows the contacts against the order for the from and to locations. You can add, edit or delete them using the **Edit** button, which shows an Order Information pop-up for this purpose.
- Comments - the Comments tab shows the comments against the order for the from and to locations. You can add, edit or delete them using the **Edit** button, which shows an Order Comments pop-up for this purpose.



1.3.4 Add Details Tab

The "Add Detail" tab of the order form allows extra details to be added if required:

The screenshot shows the 'Add Detail' tab of the 'Order details for 21' form. The top section contains various reference fields: Status (SCHEDULED), Order Ref (21), Cost Centre (POLAR-CC), Customer (CLARITY), Schedule (230713), Group Name, Booking Ref (367027), Booked In, Customer Ref (TWTEST21), and Del Point Ref (316723). Below these are tabs for Detail, Order Items, Location Details, Add Detail (selected), MTM Info, Audit, Audit Archive, Finance, Non Conformance, Payments, Savings, Trip Detail, Hazardous Data, and White Glove. The main form area includes fields for Order (PO_221), Src Sys (IMPORTS), Container No, POD/CMR No, Cont Wt (0.00), DUs (1.000), Actual DUs, Service Type, Carrier Service Level, and Service Level (S12). There are also fields for Original From, Final To, Interface Id (484016676), and Template ID. An 'Additional References' table is present with one entry: Order Reference 1, WHOLESALE. The bottom of the form has buttons for Print Label, New Order, View Info, Save, Close, Re-book, Send Ord Msg, Non Conformance, Pack, and Cancel.

The "Order" expresses details of how the order is received and is automatically generated.

The "Order" holds a number of pieces of information derived from other data:

- The first two characters refer to the cost centre, taken from the "Cost Centre Code" of the cost centre.
- The third and fourth characters refer to the customer, taken from "MTM Customer Code" of the customer.
- The fifth character relates to the "Code" of the "Delivery Type" assigned to the order.

Note: Changes to the cross-reference codes against the customer, cost centre or delivery type after order creation will not reflect on any previously-created orders, only on orders created from that point forward.

The "Src Sys" shows the origin of the order, for example "MANUAL", "IMPORTS", "TEMPLATE", depending on how the order was created. For example, created manually, imported, generated from a Lane or Template, etc.

The "POD/CMR No" (Proof Of Delivery) is entered from the Order Tracking or Trip debrief form upon confirmation of delivery.

"Container No" is a free text field to record container numbers

The "Cont Wt" or container weight is taken again from another field.

"DUs" and "Actual DUs" are a simple measure of planned against actual, and are taken from the information on the "Detail" tab.

The "Service Level" is a basic service level and informs the collection and delivery windows if configured to do so.

The "Carrier Service Level" is populated if configured against that carrier and service level. This is configured through the [Carrier Service Level](#) tab on the [Resources](#) screen.

The "Interface ID" will show an audit reference to the interface entry that created the order, if this was created through EDI.

Similarly, the "Template ID" will display the template from which the order was created, if any.

The following are also displayed and editable if you have permissions to do so in your access control group:

- "Original From" - the original source location of the order, if different to the order's From location. A lookup is provided and, when selected or entered, the location name is displayed.
- "Final To" - the final onward destination location of the order, if different to the order's To location. A lookup is provided and, when selected or entered, the location name is displayed.



- "Total Price" - the total price of the order.

The Additional References section displays any additional references sent with the order. Furthermore, certain actions (such as rebooking), or the presence of Dry Ice, Gel Packs or hazardous goods (based on the DU and product types selected) may automatically generate additional references on the order. Usually, Debrief will also generate additional references for information.

This can be used to add an additional field name and capturing a data value against that field name. These fields can then be configured on the "Configurable Search Criteria" in order to locate orders by these reference values.

You can add references to the order in this screen by clicking the + button - the screen will create a new line for you. You can now enter a reference or use CTRL-L to show a lookup of references available to be added to the order. When you have entered or selected a reference to enter, you can enter a value against the reference - this is free text entry.

You can edit additional reference codes and values from this screen by directly typing over the reference or values in the table.

You can also delete any references against the order by selecting the reference and clicking the - button.

All changes to references will be saved when you next click **Save** against the order.

1.3.5 MTM Info

This tab displays MTM interface-specific information. This is used for reference by external systems and does not impact the use of CTMS. This tab may be restricted by the user's group through [Access Control](#).

The screenshot displays the 'MTM Info' tab within an order management application. The top section contains a header with various status and reference fields, including 'Status' (SCHEDULED), 'Order Ref' (21), 'Cost Centre' (POLAR-CC), 'Customer' (CLARITY), 'Schedule' (230713), 'Group Name', 'Booking Ref' (362027), 'Booked In' (checked), 'Customer Ref' (TWTEST21), and 'Del Point Ref' (316723). Below this is a tabbed interface with 'MTM Info' selected. The main area contains several input fields for MTM-specific data: Delivery Priority, Handling Code 1, Handling Code 2, Handling Code 3, Carrier Code, Inspection Required, Testing Required, Unit of Measure, Product Item, Original City, Warehouse Code, Storage Code, and a checkbox for 'Exclude from Fixed Routes?'. There are also fields for 'Send to MTM' (checked), 'Trans. Code', 'Shipping Ref', and 'First/Last Flag'. A 'Lookup' button is located at the top right. The bottom of the screen features a row of buttons: Print Label, New Order, View Info, Save, Close, Re-book, Send Ord Msg, Non Conformance, Pack, and Unpack.

1.3.6 Audit Tab

The "Audit" tab details the original user who created the order, along with the date and time of creation. The tab also shows the last user to update or amend the order, along with a history of changes made to the order. This tab may be restricted by the user's group through [Access Control](#).



Order details for 21

ORDERS v1.50
C.TMS v12.45

Status: SCHEDULED Oms Ref: 21 Cost Centre: POLAR-CC Customer: CLARITY Schedule: 230713 Group Name: Booking Ref: 362027 Booked In: TWTEST21 Del Point Ref: 316723

Detail Order Items Location Details Add Detail MTM Info Audit Audit Archive Finance Non Conformance Payments Savings Trip Detail Hazardous Data White Glove

Audit Id	Status	Change	Changed By	Changed Date	TZ Abbr
458	INVALID	Order created.	MTS_OWNER	07/07/2023 15:16	
459	INVALID	INSERTING CC POLAR-CC	MTS_OWNER	07/07/2023 15:16	
460		Order line created - 1 BOX of AMBIENT ordered.	MTS_OWNER	07/07/2023 15:16	
461		Volume changed from 0 to 0.05000	MTS_OWNER	07/07/2023 15:16	
462	INVALID	Currency changed from NULL to GBP	MTS_OWNER	07/07/2023 15:16	
463	INVALID	Exclude from Fixed Routes changed from NULL to N	MTS_OWNER	07/07/2023 15:16	
464	INVALID	Hazardous flag changed from NULL to N	MTS_OWNER	07/07/2023 15:16	
465	INVALID	Total Volume changed from 0 to .05	MTS_OWNER	07/07/2023 15:16	
466	INVALID	Total Pieces changed from 0 to 1	MTS_OWNER	07/07/2023 15:16	
467	INVALID	Service Level changed from NULL to S12	MTS_OWNER	07/07/2023 15:16	
481	INVALID	Customer Ref changed from CLT91454 to TWTEST10	MTS_OWNER	07/07/2023 15:18	
521	INVALID	Customer Ref changed from TWTEST10 to TWTEST21	MTS_OWNER	07/07/2023 15:53	
4213	INVALID	Early Del changed from 12/07/2023 07:00 to 13/07/2023 07:00	MTS_OWNER	21/11/2023 11:00	
4214	INVALID	Late Del changed from 11/07/2023 12:00 to 13/07/2023 12:00	MTS_OWNER	21/11/2023 11:00	
4215	INVALID	Schedule changed from 230711 to 230713	MTS_OWNER	21/11/2023 11:00	
4216	UNSCHEDULED	Status changed from INVALID to UNSCHEDULED	MTS_OWNER	21/11/2023 11:00	

Created By: MTS_OWNER at 07-JUL-2023 15:16:21
Last Modified By: MTS_OWNER at 19-FEB-2024 15:11:35

Print Label New Order View Info Save Close Re-book Send Ord Msg Non Conformance Pack

1.3.7 Audit Archive Tab

The "Audit Archive" tab displays the information previously held in the "Audit" tab that has been deleted after a pre-determined number of days. A system parameter setting determines how many days the order audit information will be retained against the order. After this period has expired, the data will be moved to the archive tab, for a further pre-determined number of days.

1.3.8 Finance Tab

The "Finance" tab displays information calculated from the base data set up within the system, as part of freight payment:

Order details for 21

ORDERS v1.50
C.TMS v12.45

Status: SCHEDULED Oms Ref: 21 Cost Centre: POLAR-CC Customer: CLARITY Schedule: 230713 Group Name: Booking Ref: 362027 Booked In: TWTEST21 Del Point Ref: 316723

Detail Order Items Location Details Add Detail MTM Info Audit Audit Archive Finance Non Conformance Payments Savings Trip Detail Hazardous Data White Glove

Currency: GBP

Cost: 0.00 Costs: Revenue: 0.00 Revenue:

VAT: 0.00 VAT: 0.00

Total: 0.00 Total: 0.00

Allocated from Trip: 0.00
Standard Cost: ☐ Do not recalc
VS Revenue: 0.00
Saving:

Services

Service Id	Name	Qty	Value	Total Revenue	Inherited
ADD_DISTANCE	Additional distance	2.5	0.00	0.00	No

New Save Edit Delete

Print Label New Order View Info Save Close Re-book Send Ord Msg Non Conformance Pack

Generally, either the "Cost" or the "Revenue" will be used. The "VAT" will be shown separately, and then the "Total" is displayed. The "Allocated from Trip" field will display costs that have been allocated from the trip on which the order is scheduled.

The "Standard Cost" of the order is calculated, either from a contract, from a value set against a lane, or through "Combinations", which are linked to the lanes. By checking the "Do not recalc" box, this value will be fixed.



"VS Revenue" is calculated from the trip on which the order is scheduled and, if there are two or more orders on the trip, will be a proportion of the trip cost.

Additionally, comments are shown here:

- The "Last Error" field will display the last error, which occurred when saving the order; in this case, it is a contract error linked to the way freight payment is configured.
- "STD Cost Data"
- "Revenue Data"
- The "Lane Comments" is read only and is only populated when orders are created by Lane-based order entry. The "Order Comments" field is a free text field to record any information not yet incorporated.
- You can also enter some general "Order Comments" here, for your reference.

You can view and enter additional order services here if configured in the system. These services are additional charges against the order that are not captured by the contract. These are generally charges that are incurred by the customer at the time of delivery, for example, demurrage or excessive waiting time, excess handling, etc. They are only charged where applicable. In most examples, these cannot be included in the contract, as they may not always be charged.

To enter a service, place the cursor on a new line (in the service ID column) or click the provided **New** button. Then select CTRL-L to select a service type.

Once selected, the screen will display the ID and description. You can now enter a quantity. A value may be automatically generated for this service, based on the quantity (if this has been configured with a base cost for the service against the [customer account](#)). If not, you can enter a value here, and the total revenue will be calculated and shown here. You can indicate whether the charge should be inherited.

You can save your changes to order services with the supplied **Save** button. You can delete any order services using the supplied **Delete** button.

When the record is saved and the order is saved, a new payment record is created, and the payment is included in the order revenue total.

Note that Order services may also be entered during debrief, and will be visible against the order.

You can view all trip costs or order revenue using the **Costs** and **Revenue** buttons, respectively. This will display the Payments screen, which is covered in more detail in the [Finance guides](#). Note that the order services will generate payments against the order, and will show the payment type and narrative, as set up against the service charge configuration against the [account](#).

1.3.9 Non Conformance Tab

The "Non Conformance" tab details any non-conformances associated with the order. These will generally be applied from the "[Trip Debrief](#)" form, and will be reasons for early or late despatch or delivery, discrepancies, etc.

A record of the reason for rebooking can be viewed in the *Non Conformance* tab, if this is a rebooked order.

Non-conformance is covered in the [Debrief](#) page.



1.3.10 Trip Detail Tab

A cross-docked order would show multiple trips.

This layout is configurable.

1.3.11 Hazardous Data Tab

This tab offers a place to view and enter any UN codes related to any items on the order, should they exist, as dictated by any ADR or other hazardous goods regulation.

1.4 Re-booking Orders

A pop-up window will appear - you will need to input the new delivery date and give a reason for rebooking the order. Once the "New Date" and "rebooking reason" have been entered, click **OK**. You will now be asked if you either want to change the schedule to that of the earliest collection window of the rebooking, to retain the same schedule as the original order or enter a different schedule completely.

Once you have selected your choice, the rebooked order is now created. Note that "_R1" will be added to the "Customer Ref" field. Note also that any re-books of this " R1" order will become " R2", etc.

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Note: Orders that have no actuals against them will be set to a status of "aborted" and cannot be edited. If the order is on a trip, then it will be removed, and the order status set to "aborted". If this is the only order on the trip, then the trip will also be deleted.

If the order has actuals against it, then the status of the order remains unchanged. The order will also remain on the trip.

A record of the reason for rebooking can be viewed in the *Non Conformance* tab of the rebooked order.

1.5 Cross Docking

Crossdock or x-dock - means of delivering an Order via one or many additional locations.

1.6 Tips & Tricks

RPE stands for Regular Pallet Equivalent and provides a standard measure for comparing DU Type size, and thus how much space a DU will take up on a Trailer or vehicle. For example, a Standard Roll Pallet may equate to 1 RPE, a Large Board may equate to 2 RPEs. Typically, this is used to determine vehicle fill rate, and used for capacity management of vehicles executing trips, based on these orders (as the RPE values are rolled up to the trip stops and the trip on which they are planned).

Typically RPE would be used on the basis of a 1.1 m3 equivalent pallet, and therefore, you would set up items accordingly.

However, if you have small items that do not take up much space or weight, then consider setting these as RPE 0, and setting the RPE of other items to 1 (as opposed to being based on a volumetric percentage, as shown above). Then RPE will show the quantity of items that you care about filling the vehicle.

You would then need to set the capacity of the trailers or vehicles accordingly - for example, my operation delivers tyres to the trade. I also deliver miscellaneous items, and use order lines to show charges like delivery charges. My operation cares only about how many tyres we are loading. Therefore, I set the Miscellaneous and Charge DUs to have RPE of 0, and Tyre DUs to have RPE of 1. I also set the vehicle's capacity so that an average (or maximum) number of tyres is the total capacity, for example, 60 tyres to a van, 120 tyres to a larger vehicle, etc.

This then still provides capacity management and vehicle fill percentages when planning, but also allows me to see an easy count of the items that I care about on orders in all screens that display RPE - in CTMS, that's all of the planning, execution, overview, order and debrief screens. The other DUs don't count towards this total, but can still be configured for loading and unloading rates and weights.



1.7 Fast Order Entry

Fast order entry can be enabled through an access control function parameter "FN_FAST_ORDER". Essentially, this changes the Detail tab so that certain additional fields are always present, and allows quick entry of the order through the Detail tab.  **Note:** This is very bespoke to healthcare-related operations and should not be enabled for other transport operations.

When a user belongs to a group with this function assigned, the following will be applied when creating an order:

- A new line level tab is displayed with Commodity, Dead Weight, dimensions and volumetric weight displayed.
- The from location, customer, cost centre, early collection date and time will be pre-populated, based on the data assigned to the user in [Access control](#).
- Items will be automatically generated from the lines when the order is saved. The item identifier will be generated using the OMS reference and a count of the items.

The screen header display is altered as follows:

- Service Level.
- Transport Mode.
- Tailgate.
- Re-Locate.
- Pick Qty.

The following are disabled on the screen:

- Delivery Type.
- Vehicle Type.
- Temp Combo.

The following fields will have been pre-populated with data set in the [access control](#) screen:

- Cost Centre.
- Customer.
- Group Name.
- From Loc.

Users will have different PICKPACK logins, where the customer will be set, based on the customer for whom they are preparing the pick/pack orders.

You are required to enter the delivery location, service level and transport mode. This information, in conjunction with the customer and from location, will be used to set the collection and delivery windows.



The windows are derived from the schedule rules.

The date identifies the relevant zones for the collection and delivery location, and, using the offset values, will set the collection and delivery dates. The collection date will be set relevant to the cut-off time.

If an order is created after the cut-off time, then 1 will be added to the off-set, to increase the collection date by 1 day. The early collection time will be set to the current time, and the late collection time will be set to the late time. For the delivery windows, the early and late times will be used.

For the windows to be populated from this table, there must be a record that matches the customer, service level, cost centre and location zones in [Scheduling Maintenance](#). Once the windows have been set, they may be manually edited.

The detail section is completely bespoke and non-configurable. It contains the following information:

- Line number (non-editable, automatically populated).
- Qty.
- Order Temp.
- Commodity.
- Class.
- DG.
- DU Type Outer.
- DU Type Inner.
- Dry Ice Qty.
- Gel Pack Qty.
- Dead Weight.
- Length.
- Width.
- Height.

The following are calculated and displayed:

- Cubic.
- Volumetric Weight.
- Chargeable Weight.

You are required to enter the order lines manually, with no pre-population.

The following fields are mandatory:

- Quantity.
- Order Temp.
- Commodity.
- DU Type Outer.
- Dead Weight.

You may be required to enter a class based on the commodity you have selected. Selecting the commodity will automatically set the dangerous goods flag when relevant.

If you select a non-ambient Order temp, you will be required to enter the quantities of the relevant additional packages. If you select WETICE, then you must enter a quantity of GEL PACKS. If you select DRYICE, then you must enter a KG quantity of DRYICE. When you select AMBIENT, no additional packaging quantities will be required.

When an outer DU type is selected, the relevant dimensions will be populated on the screen. You must enter the weight to allow the system to calculate the Volumetric and Chargeable weight.

Multiple lines may be entered.

When entering Order Temp, Commodity, Class and Inner or Outer DU Type, you must select a value from a list. If you enter a value that is not in the list, the system will display an error. The data lists are populated from maintenance tables on the system (maintained in the [Products](#) maintenance screen).

When you save the order, the lines will be used to generate the items automatically. The quantity on each line will determine how many items are generated. The item information will be inherited from the line. You will then be able to edit the individual items through the existing *Order Items* tab.



1.8 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
SERVICES	Controls if service payments are generated	COST CENTRE
OMS_ALLOW_MANUAL_SCHEDULE	Display Manual Schedule Flag in orders screen	COST CENTRE
SCH_SCHED_ORD_DERIVE	Controls the Order Schedule Date. Acceptable values ECDT, LCDT, EDDT, LDDT.	SYSTEM
ALLOW_DUPLICATE_CUST_REF	Allow orders with duplicate cust refs but different to locations.	SYSTEM
ALLOW_HOLD_ORDERS	allow orders to be placed on hold	SYSTEM
CANCEL_STATUS_CHK	Only orders on Planned trips can be cancelled	SYSTEM
CHANGE_DEBRIEF_LABELS	Controls the labels for certain items in the debrief and orders screen	SYSTEM
DEF_SERVICE_LEVEL	Default service level for orders when null	COST CENTRE
GEO_DT_CALC_ORD	Determines distance calculation method for orders	COST CENTRE
OMS_CHECK_CUTOFF	Controls if cut of times for product and du are considered when creating orders	SYSTEM
OMS_DEFAULT_ORDER_CREATION	Controls dates needed when creating Orders in Orders form. ALL, COLLECTION, DELIVERY or STANDARD	SYSTEM
OMS_ORDER_AUDIT_ARCH_DAYS	Number of days that Order Audit message should be retained in the main table before being archived.	SYSTEM
OMS_RESET_AUTO_PROC	Will the auto-processed flags of the order for the scheduling engine be reset when the early delivery date and time is changed? (Y/N)	COST CENTRE
OMS_RE_BOOK_STATUS	Controls the status of re-book orders to DEL FUTILE	SYSTEM
OMS_VALIDATE_INACTIVE_CODES	To validate orders with error condition for an invalid code for delivery type and service level	SYSTEM
ORD_DESP2_RESEND	Allow Desp2 message to be resent from orders screen	COST CENTRE
ORD_ENHANCED_REBOOK	Controls which rebook screen is displayed in the orders form	COST CENTRE
ORD_POSTCODE_SEARCH	Determines whether the user can search for order addresses via a postcode (Y/N).	SYSTEM
ORD_SET_BUSINESS_TYPE	Set Business Type on Orders	COST CENTRE
ORD_SET_SERVICE	Controls if the service level is set to match the delivery type	SYSTEM
ORD_SPLIT_ALL_REFS	Are all references copied when items are split?	SYSTEM
ORD_SPLIT_REBOOK_ITEMS	Controls if items on the original order suffixed with X when the order is re-booked	COST CENTRE
ORD_SPLI_ALL_REFS	Are all references copied when items are split?	SYSTEM
ORD_TEMPERATURE_COMBO	Use Temperature Combo to determine if the customer reference should be highlighted.	COST CENTRE
ORD_UPDATE_LATE_COLL_DATE_TO_DEL	Controls if the Late Collection Date/Time is updated at Save to Match the Late Delivery Date/Time.	SYSTEM
ORD_VALIDATE_GROUP_NAME	Validate Group Name during order entry	COST CENTRE
REBOOK_ALT_STATUS	If set to Y when an order is rebooked the original orders status will not be changed	SYSTEM
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
REFRESH_WHEN_CLOSE_ORDER_DETAILS	Refresh the order summary screen when you close the order details page in the Orders form	SYSTEM

The following Access Control rights affect this functionality:

Parameter	Description	Level
FN_FAST_ORDER	Allows Fast order entry	Functions



Parameter	Description	Level
ORD_EDIT_PRICE	Ability to display and edit price.	Functions



2 Orders

Orders or Transport Instructions form the input to the scheduling process. They are created in several ways including via the [Create TI?s](#) function, [Order Templates](#), [Imports](#), and manually via Order entry using the [ORDERS](#) form or [Order Entry Target](#) form.

Each Order details the actual collection and delivery windows on particular dates when the quantities of the [Product Types](#) should be collected and delivered. Typically an Order details no more than a single truck-load of goods to deliver.

Schedule	Col Ref	Status	Type	Collect	Ready At	Deliver	Deliver By	Target
061205	496321	SCHEDULED	Standard	BURTEON Burton_Edinburgh Fac	04/12/06 00:01	BURWALT Burton_Walton Sum	04/12/06 18:01	
061205	496322	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:33	ASDAORAN Grangemic_Asda 3ra	05/12/06 00:30	
061205	496331	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:33	ASDAORAN Grangemic_Asda 3ra	05/12/06 00:30	
061205	006158948	UNSCHEDULED	Standard	EXE_WHITE Whitwood_Exel - Whitwoc	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 02:00	
061205	496332	UNSCHEDULED	Standard	EXE_WHITE Whitwood_Exel - Whitwoc	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 02:00	
061205	496332	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	ASDAORAN Grangemic_Asda 3ra	05/12/06 03:00	
061205	496332	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	ASDAORAN Grangemic_Asda 3ra	05/12/06 03:00	
061205	0003247130	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 05:00	
061205	0003247130	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 05:00	
061205	0003247203	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 05:00	
061205	0003247131	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 05:00	
061205	0003247140	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 16:03	SUPEPCNT Pontefra_Superdrag	05/12/06 05:00	
061205	01384725	UNSCHEDULED	Standard	EXE_TRAFF Trafford_Exel - Princes	04/12/06 21:03	COSTLUTT Lutetwa_Cosco Uk	05/12/06 08:00	
061205	496140	UNSCHEDULED	Standard	EXE_BAWT Bawtry_Exel - Bawtry_Dt	04/12/06 21:03	BRAKLEED Leeds_Brakes - T & L	05/12/06 08:00	
061205	056515	SCHEDULED	Standard	EXE_STAN Stanton_DHExel_IP31	04/12/06 22:03	WILKINSON Major_Wilkinson Gro	05/12/06 08:00	

2.1 Manual Order Entry

An Order can be manually created in which case the collection and delivery times and [Product Types](#) and quantities need to be manually entered. There are 3 ways of entering the collections and delivery windows, the user has the option to enter standard times (early collection, later collection, early delivery and late delivery), or a collection target time or a delivery target time. If a target time is entered the other times are calculated from the Target time.

When the Order is saved it is validated to calculate totals, e.g. the RPE quantity, and check that the Order is indeed valid, e.g. the Order is collected before it is delivered. Once the Order is successfully validated it is stored in a status of [Unscheduled](#) ready for scheduling.

Changes to important fields on an Order are written to an Audit table to provide a means of seeing when an Order was changed and who changed it. For more details see the [ORDERS](#) form help page.

2.2 Create TI?s

Create Transport Instructions is an automated [Slot](#) Order creation facility initiated from the [Bookings](#) form. This function is described in detail in the [Create TI?s](#) section of this wiki.

2.3 Order Templates

[Order Templates](#) provide the facility to create Orders from predefined data. A Template can be created that stores similar information as an Order, which can then be generated to create an Order that inherits the detail on the template. The Template can then be re-used to generate similar Orders perhaps every day.

Templates can be generated independently or grouped into Batches. A Batch can contain many Templates which can be generated in a single instance rather than generating each template one by one. The screen shot below shows the Order Templates screen with a Batch and one of its Templates selected.

2.4 Additional Functionality

The history of Batch and Template generation is stored so that a Batch is not inadvertently generated twice on the same day and to keep a reference to when and by whom the generation process was initiated.

Orders can also be created via Imports, see the [Imports](#) section for more details.



Additional functionality that is available within the Orders suite includes Re-booking. The re-booking process is used when an orders has not been successfully delivered for whatever reason but still needs to be delivered. A duplicate order is created which can then be scheduled onto a new trip, any costs that were incurred against the original order are maintained and can be charged back to the customer if appropriate.



3 Item Management

This screen allows querying of the history of a specific asset or item.

The screenshot shows the 'Item Management' window with the following details:

- Asset / Pallet id:** 50552324AAA67580
- Date from:** 22-MAY-2024
- Date to:** 29-MAY-2024
- Search:** (button)

Item ID	Pallet ID	TU	External Ref	Depot	Reason	Description	Trip ID	Created Date	Created By
Dtls 00001-B	50552324AAA67580		T01501011	T2	SC	26/MAY/24 13:05 ROWE0022		26/05/2024 13:05	ROWE0022
Dtls 00001-B	50552324AAA67580		T01301011	T2	SS	26/MAY/24 12:57 CLAR0188		26/05/2024 12:57	CLAR0188
Dtls 00002-B	50552324AAA67580		T01300329	T147	SD	24/MAY/24 09:45 CURN0003		24/05/2024 09:36	CURN0003
Dtls 00002-B	50552324AAA67580		T01300329	T2	SC	24/MAY/24 09:36 CURN0003		24/05/2024 09:36	CURN0003
Dtls 00002-B	50552324AAA67580		T01300329	T2	SS	24/MAY/24 08:59 LAWL0007		24/05/2024 08:59	LAWL0007
Dtls 00003-Z	50552324AAA67580		AHC01 RTE-T2	SD		23/MAY/24 14:42 SMT0104	RTE-01664381	23/05/2024 14:47	EPOD
Dtls 00003-Z	50552324AAA67580		AHC01 RTE-T167	SL		23/MAY/24 12:17 SMT0104	RTE-01664381	23/05/2024 14:47	EPOD
Dtls 00001-B	50552324AAA67580		T01299790	T7	SS	22/MAY/24 15:35 RAK0002		22/05/2024 15:24	RAK0002
Dtls 00001-B	50552324AAA67580		T01299889	T7	SS	22/MAY/24 15:35 RAK0002		22/05/2024 14:43	RUDG0004
Dtls									
Dtls									
Dtls									
Dtls									
Dtls									
Dtls									

You can search for items by:

- Entering an item or asset ID.
- Entering a date range (defaulting to the last week).

The screen displays a history of the item from latest (at the top) to earliest (at the bottom), so that you can see the movement of that item or asset through the network.

The information on this screen is sourced from Item reasons information.

The details shown will be as follows:

- Item - a unique item ID identifying the product in the box.
- Pallet
- TU - The transport unit ID - an outer transport media ID i.e. a cage into which the box has been placed.
- External Ref - the order external reference.
- Depot - the depot at which the event happened.
- Reason - a reason for the scanning event or exception. Common codes are:
 - ◆ SS - Successfully Scanned.
 - ◆ SC - Successfully Collected.
 - ◆ SL - Successfully Loaded.
 - ◆ SD - Successfully Delivered.
- Description - description of the scanning event.
- Trip ID
- Created Date
- Created By

There is also a **Dtls** button against each line to show more details of the order.



The screenshot shows a window titled 'Item Details' with the following fields and values:

Field	Value
Oms Ref	5033709
External Ref	T01301011
Customer	
Prod Type Id	B
Item Identifier	00001-B
Pallet Id	50552324AAA67580
Item Description	
Weight	
Volume	
Current Location	
Transport Unit Id	
Transport Unit Type	
Qty Ordered	1
Qty To Deliver	1
Qty Delivered	
Units	6

A 'Close' button is located at the bottom right of the window.

This screen displays:

- OMS Ref
- External Ref
- Customer
- Prod Type ID
- Item Identifier - a unique identifier
- Pallet ID - the containing box
- Item Description - a description
- Weight
- Volume
- Current Location - the current location if not in transit.
- Transport Unit ID - an outer transport media ID i.e. a cage into which the box has been placed.
- Transport Unit Type - the type of transport media.
- Qty Ordered
- Qty To Deliver
- Qty Delivered
- Units - the number of contained units on this item.



4 Lane Based Orders

The Lane Based Order module enables speedy entry of orders as the user does not have to key in the information that remains the same each time the order is placed, this standard information is stored in ?Lanes? and is automatically applied.

LB_ADMIN v2.38
MTS v10.5.0

Users Groups Lanes Combinations Rules Cutoff Times Order Maintenance

User

User Id: ADKINM Country: UK - Bawtry
User Name: Martin Adkin Company: DHL Consumer Network
Enabled: ☒ Messaging

User groups

Group Name	Description	Enabled	Lanes can be Ordered?	Tracked?
		☒	☒	☒
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

Delete Gro...

Cancel Search Save Close

A Lane is maintained by using the Lane Based Order Admin form. Each lane contains the ?From? and ?To? location; the Customer Code and Cost Centre. A lane may also have a Billing Unit assigned, this is used if charges need to be applied to an entity other than the customer. Lane rules are also maintained within the Lane Based Order Admin form. A collection and delivery lane rule has to be applied to a lane, this gives a more accurate picture of when an order can be collected and delivered. Once the lanes have been set up, they can be bundled together to form Lane Groups, for example in a UK operation a Lane group may contain all the Lanes for a postal region or a county. Users can then be assigned to one or many different Lane Groups, this then restricts that user to only be able to order lanes within that group.

LB_ORDER v2.47
MTS v10.5.0

Lanes Orders Order Maintenance

Lanes

Name Description Groups: ALL From To Product Du type

Order Lane

Orders

MTS Ref	Lane	Qty	Del type	Load type	Product type	Du type	Collection	From	Till	Delivery	From	Till	Exe

Cancel Order Detail

Submit Orders Close

When a Lane is ordered the user is required to key in any missing data, this will usually include the quantity and some collection and / or delivery times. Once the orders have been created the system can be configured to generate a



Booking Confirmation email message that can be sent to a specified email address of fax number. This would typically be sent to the lane administrator and/or the Carrier.

4.1 Key Functionality

The key functions within the Lane Based Order Entry form are as follows:-

4.1.1 Order Lane

To create an order a lane has to be selected, this is done by highlighting a particular lane. Once a lane has been selected, the details are copied from the lane section into the orders section. The quantity can then be entered along with collection and delivery dates and times, if required. The **Product Type** and Du Type can be changed if necessary. There is a facility that allows the default collection/delivery dates and times to be over-ridden, checking ?Exp? box does this. All dates and times must then be entered.

4.1.2 Order Detail

Once the Lane Based Orders have been submitted, the order can be viewed or edited - this functionality allows the planner to add other order lines to the order, without having to exit the LBO Entry form. This can only be done for submitted orders - where an **C-TMS** Ref exists.

4.1.3 Submit Orders

Creates orders by validating each order and calculating the collection & delivery date/times according to the rules applied to the lane being ordered.

4.1.4 Close

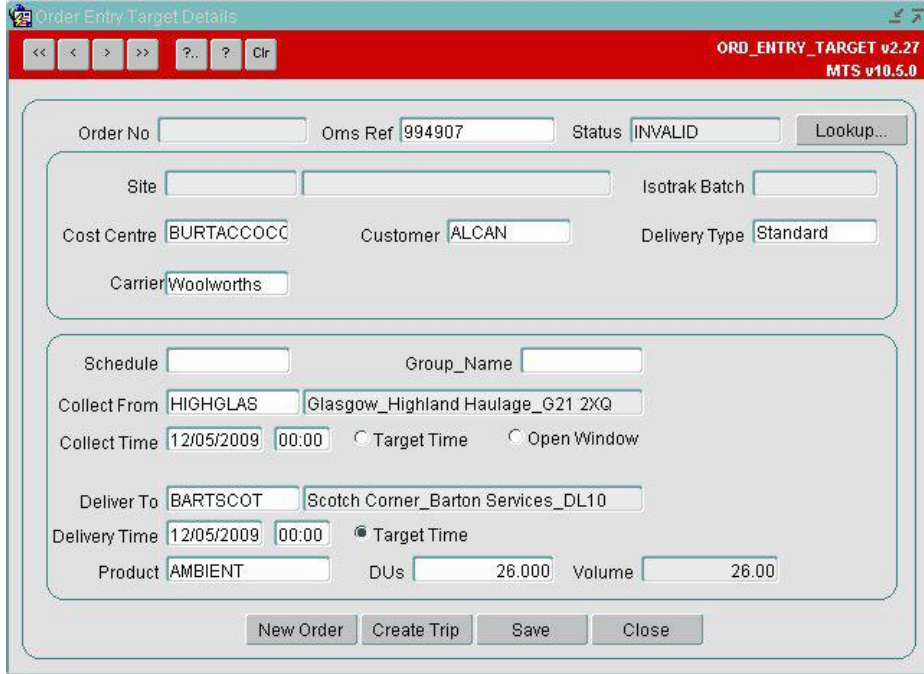
A message will be generated for those orders that have been submitted. The email is normally sent to the user and/or anyone who has an interest in any of the lanes that have been ordered.



5 Order Entry Targets

 **Warning:** This is an incomplete guide.

The Order Entry Target module is used to detail the actual collection and delivery windows on which an order should be collected or delivered.



The screenshot shows the 'Order Entry Target Details' window. The title bar includes 'ORD_ENTRY_TARGET v2.27' and 'MTS v10.5.0'. The window contains several input fields and buttons for managing order targets.

Top Section:

- Order No:
- Oms Ref:
- Status:
- Lookup... button

Second Section:

- Site:
- Isotrak Batch:
- Cost Centre:
- Customer:
- Delivery Type:
- Carrier:

Third Section:

- Schedule:
- Group_Name:
- Collect From:
- Collect Time: ☐ Target Time ☐ Open Window
- Deliver To:
- Delivery Time: ☒ Target Time
- Product:
- DUs: Volume:

Bottom Section:

- New Order button
- Create Trip button
- Save button
- Close button



6 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:



Order Template Batches

Batch Active

0 Collection ☒

0 Crossdock ☒

0 Other Deliveries ☒

0 Samples ☒

3663 Deliveries ☒

3663 deliveries ba ☒

ACCANTIA ☒

ASDA BANBURY ☒

Asda Deliveries ☒

BANBURY ☒

BATLEYS BANBU ☒

BENKISER ☒

BESTWAY BANBU ☒

BEZIER ☒

BLACKPOOL BIS ☒

BLACKPOOL CON ☒

Batch ID

Status

Effective Date

Owning Depot

Shipping Ref

Group name

Schedule Type

Schedule Day

Create Time

Cost Centre

Customer

OK Cancel

Product Type	Du Type	Qty	Weight	Volume
AMBIENT	CHEP PALLE	26.000		26.00000

Reset Quantities Generate Save Close

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.



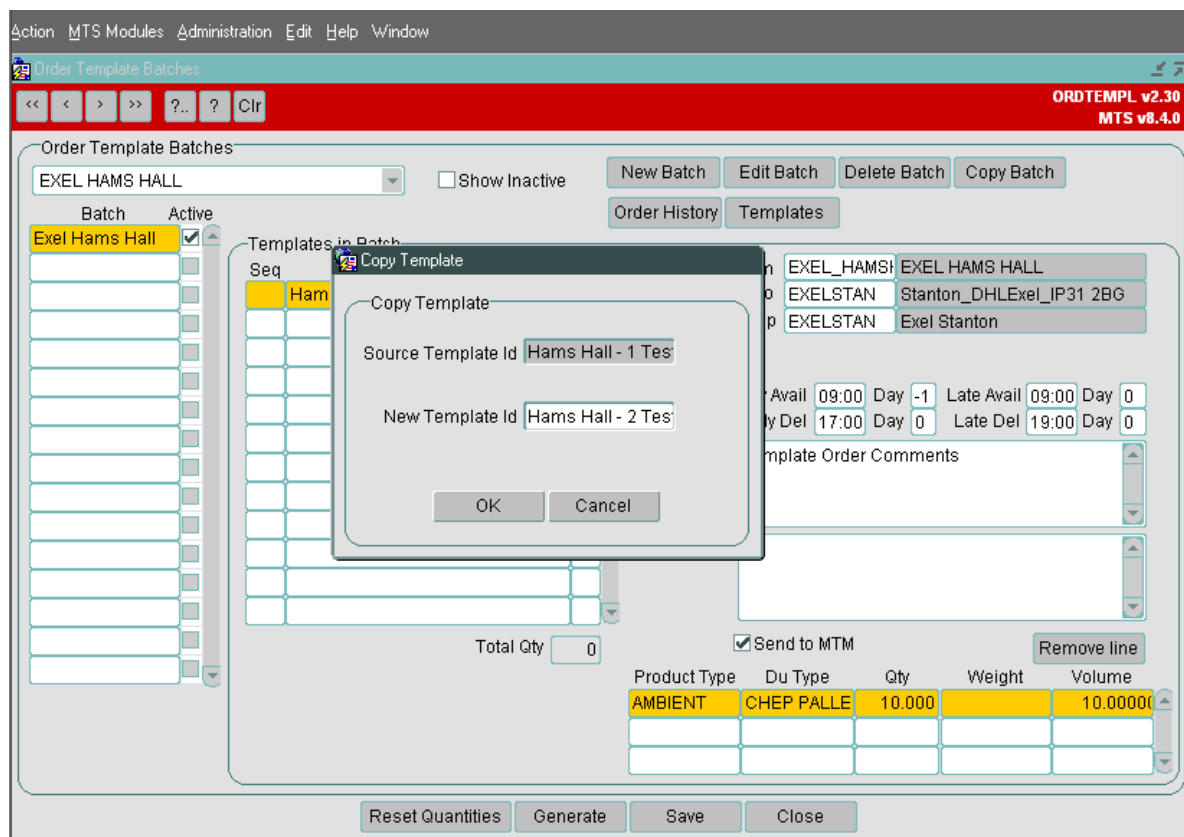
The rest of the information can be entered in this form in the same way as using the Order Details form; the only difference is that numbers are used to represent the day rather than a date. This number relates to the day on which the template or batch is being generated i.e. "0" would be the same day,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

6.1 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_DHLExe 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	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_DHLExe 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

EXCEL HAMS HALL

Batch Active

Exel Hams Hall

Templates in Batch

Seq

1 Hams Hall

2 Hams Hall

3 Hams Hall

4 Hams Hall

5 Hams Hall

6 Hams Hall

sample

Batch Id: Exel Hams Hall

Schedule Date: 10/11/06

Generate orders for Batch Exel Hams Hall

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

OK Cancel

Total Qty

Send to MTM

Remove line

Product Type	Du Type	Qty	Weight	Volume
AMBIENT	CHEP PALLE	10.0000		10.000000

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

08/11/2006

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

Edit Order Save

Order Id: EXPRS425870 Oms Ref: 425870

Cost Centre: EXEL Customer: PRINCES

Sched Name: 061110 Group: EXELSTAN

Collect From: EXEL_HAMS_HALL 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	Du Type	Qty	Weight	Vol
AMBIENT	CHEP PALLE	10.0000		10

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-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 Conf	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	EXELBEL Bellshill_Exel Bellis	MORRSTC Stockton_Morrisons		31-JUL-200	
661 Tesc Wel Green	EXEL	CAMPSIETES	23:59	23:59	EXELBEL Bellshill_Exel Bellis	TESCWEL Welham Green_Tes		25-SEP-200	
8.4 Test 01	COST CENTRE	CUSTOMER	02:00	12:00	DEPOTE0 Test Depot	CUSTTE0 CUSTOMER TEST (		09-OCT-200	
8.4 Test 02	COST CENTRE	CUSTOMER	02:00	14:00	DEPOTE0 Test Depot	CUSTTE0 TEST CUSTOMER (		09-OCT-200	
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-200	
A&J CARTER BLABY					EXELLUT Lutterwo_New Conf	AJCABLA Blaby_AJ Carter_LE		15-FEB-200	22-FEB-2006 1
AAHPERR			00:01	00:01	EXELLUT Lutterwo_New Conf	AAHPERR Perry Ba_Aah Pharr		04-MAY-200	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_Exel - Bawtr	EXELBAWT	27-SEP-200	08-MAY-2006
ACWAWEST			00:01	00:01	EXELLUT Lutterwo_New Conf	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 Smc	EXELWHI Whitwood_Exel - Wh	EXELWHIT	02-MAR-200	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.

6.2 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.



7 Slots

Collection and Delivery Slots are maintained via the 'Slots' tab on the MTS Host **Locations** form. Each Slot details the collection and delivery windows on a particular day that the collection or delivery of goods from one location to another should be scheduled. Slots can be configured to use a specific **Trailer Type** and accept specific **Product Types**. Slots are filled by the **Create TI's** process invoked from the Bookings form.

7.1 Key Functionality

7.1.1 Manual Slot Manipulation

Provides the facility to manually add, edit, delete and inactivate Slots. Only Slots in a Status of Active are displayed by default in the Slots tab as only Active Slots are considered by the system in the Create TI's process. A function to view Inactive Slots is included. Also provides the facility to add, edit and delete Product Types and a Trailer Type from a Slot.

7.1.2 Slot Import

Slots can be imported into C-MTS Host via an inbound interface. In the case of Sainsbury's Supermarkets this is the VAST interface that runs nightly. This interface process inactivates all Slots in the system then either reactivates any Slots that exist in both the system and the new interface file or creates any new Slots. The Slot Import functionality on the Slots tab simply allows this import process to be invoked manually if required.

7.1.3 Multiple Slot Deletion

This function allows Inactive Slots to be removed from the system if they have not been activated for a user specified period of time. This ensures a manageable number of entries are displayed in the Slots tab if the option to display Inactive Slots is selected.

7.1.4 Dynamic Day Offsets

All Slots have collection and delivery windows and apply to a particular day. Slot windows are held with actual times, e.g. 10:00 - 11:00, and day offset. The use of day offset minimises user maintenance as the actual date a Slot is used is not stored, it is implied by the day offset e.g. on Friday 12th July 2002, a Slot stored with a delivery window of 0 23:30 to 1 00:30 will be interpreted as 12th July 23:30 - 13th July 00:30 i.e. the day offset is used to decrement or increment the actual date on which the Slot is being used.

7.1.5 Slot Trailers

Each Slot can be configured with a specific Trailer Type. This allows a Slot to be configured to use, for example, a more manoeuvrable Trailer if access is restricted.



7.1.6 Slot Products

Slots can be configured to accept one or more Product Types. When Orders are created in Slots by the Create Transport Instructions process, the process is constrained to only fill Slots with permissible Product Types. If a Product Type is not compatible with a Slot it cannot be assigned to the Slot. Each Product Type in a Slot has a Priority. If the Priority is one then the Product Type will always be assigned to the Slot. However, if the Priority is two, the Product Type will only be assigned to the Slot if it is topping up the Slot i.e. the Slot already contains some Priority one Product Type. Slot Product Types can also be designated as Advance Only so that only Advance Orders for the appropriate Product Type are assigned to the Slot.



8 Booking Entry

The Bookings module enables the processing of product item quantity and product quantity records which detail the quantity of each item, case, SKU or product that is to be delivered from one location to another, perhaps an RDC to a store, on a particular date. If the data is loaded at item or SKU level it will be summarised to create higher level Bookings records to simplify processing, alternatively Bookings records can be entered directly. Once the Booking records have been created the Bookings module allows the user to convert them into Transport Instructions (Orders).

Each Transport Instruction details the quantity of one or more compatible product types at DU level to be delivered from one location to another at a particular time on a particular date, rather than Product Quantity records which detail the quantity of each individual SKU, to be delivered from one location to another on a particular date.

To display the data for this schedule click the **?** button to the immediate right of the schedule name dropdown box. Alternatively, select a different schedule using the dropdown and click **?** to action the search.

This will display all Booking records related to this schedule; information detailed will be as per the input data, with the main fields being Source, Destination, Delivery Date (Based on Schedule Name), Product Type, DU Type and Sum (Quantity).

Note that the Quantity fields can be configured to display differently based on a C-TMS system parameter for a format mask e.g. 9999.000 or 99999.000.

Double clicking a record will display further detail in a popup window:



AS	Total	PQ	Total	VQ	Actual	Var
5000.0	5000.0					
11250.0	11250.0					
3500.0	3500.0					
5000.0	5000.0					
3500.0	3500.0					
2000.0	2000.0					
3500.0	3500.0					
3500.0	3500.0					
5000.0	5000.0					
5000.0	5000.0					
2000.0	2000.0					
6000.0	6000.0					
3500.0	3500.0					
5000.0	5000.0					
7500.0	7500.0					
5000.0	5000.0					
2000.0	2000.0					

Note that bookings can be imported through the Imports functionality:

- **BOOKING**

8.1 Key Functionality

8.1.1 Auto Summary

Summarises SKU level demand that is to be delivered, from one location to another on a particular date, from the SKU level Product Quantity data into DU level Product Summary records. For example, 730 Non Perishable SKU's may summarise into 8 Non Perishable Despatch Units. This results in 730 SKU level records being transposed by the Auto Summary function into a single manageable record of 8 DU's. The demand that is summarised by the Auto Summary function can be supplied via a Bookings inbound interface file.

8.1.2 Copy Bookings

Enables Product Summary records to be copied from one schedule date to another. This allows data to be copied as contingency if the inbound Bookings interface fails and therefore no demand for a particular schedule date is received.

8.1.3 Manual Booking Manipulation

Provides the facility to manually add, edit and delete Product Summary records. Enables Product Summary records to be manipulated to cater for situations where a Product Summary record may need to be, for example, deleted as a store is unable to receive its demand or edited to handle a late request by a store for increased demand.



8.1.4 Manual Advance & Left Off?s

Allows demand to be advanced or brought forward from one day to another or demand that could not be delivered, i.e. left off, to be added into the next days schedule. Complete flexibility is included to allow advances to be split from, and left off's to be added to, one or more future schedules.

8.1.5 Create Transport Instructions

Creates Transport Instructions or Orders, including **Crossdock**'s, from one location to another so that delivery is performed within Slot time constraints imposed by the destination location. Each delivery Slot is examined in priority order and filled according to the following constraints: Slot/Trailer capacity, Slot/Product compatibilities, Product Temperature compatibilities, Order Delivery Time, Trip Depart Time and Product Picking Rates. Transport Instructions form the input to the scheduling process. However, Create Transport Instructions also handles Post Schedule Order and Trip Manipulation to cater for late planning scenarios.

See [Create Transport Instructions](#) for more details.

8.1.6 View Orders

You can view the order(s) generated from a particular booking by left clicking the booking, then right-clicking and selecting *View Orders*.

This will open the generated order in the Orders form:

[illegible]

8.1.7 Auto Advance

Automation of manual advance process where a predetermined list of stores can be configured to receive advances at the press of a button. The function not only creates advance demand for a schedule but also creates the associated Orders to remove the need to recreate Transport Instructions.

8.1.8 Reverse Transport Instructions



Reverses out Orders created by Create Transport Instructions. The mode in which Reverse TI's is called dictates whether Unscheduled, Scheduled, Advance Only, all Orders or only a specific quantity of DU's from Orders are reversed. Reversal of Transport Instruction's gives flexibility to allow an entire inappropriate plan to be reversed and recreated with alternative reference data or just a specific RDC, store, product type and DU combination to be reversed if created in error or just no longer required.

8.1.9 Variance Filter

If the slot capacity for a particular day and destination location is exceeded, the total booking quantity may not be generated on a Transport Instruction. This difference in quantity is handled as "variance" and is displayed in the Booking screen in the "VQ" column.

Variance can be created for several reasons and it can be controlled by two main configuration items:

- A % threshold against a particular product type as configured in the slot.
- The Max RPE quantity of the Trailer Type associated with the slot.

If no slots exist for a particular day and destination location then the variance will be 100% of the booking quantity.

The slot data can be viewed and manipulated in the [Locations](#) screen.

This filter allows the records displayed in the Bookings screen to be restricted to those that have a discrepancy between the demand quantity and the quantity that was used to create Orders via Create TI's. This allows a planner to easily and quickly identify any offending Product Summary records and subsequently determine why the demand has not flowed onto Orders, whether it be because there were no more appropriate Slots or violation of any other of the Create TI's constraints.

8.1.10 Actuals Filter

Allows the Bookings screen to be filtered to show Actuals against intended delivery quantities. Discrepancies between these two values can then be easily identified and any trends in the schedule derived and corrective action taken.

8.1.11 View Detail

Enables the Product Quantity data to be viewed to determine how the Auto Summary process transposed many records into few. This view identifies the actual volumetric data, whether it be SKU or product type weight and volume that was actually used in the Auto Summary calculations. Spurious Volumetric data can then be corrected to prevent miscalculations in the future..



9 Create Transport Instructions

The process of Creating Transport Instructions (Orders) will effectively take the C-TMS booking requests, reference the Location Slot data and produce one or many orders, each with a unique OMS Reference number. There are a number of configuration items which are referenced when generating TI's, the main one being the maximum trailer fill capacity, which will effectively control the booking volume that can be propagated onto an order record.

Clearly, a required pre-requisite is to have booking data in the system, this can be entered in one of three ways:

- Manually keyed
- EDI Upload
- Booking CSV Import

The Create TI's function is initiated from the **Bookings** form. The function creates Transport Instructions, or Orders, which detail the quantity of a **Product Type** to be delivered from one location to another at a particular date and time. The collection and delivery window times that an Order adopts are dictated by the Delivery Slot in which the Order is created.

Once the Booking data is entered as required, the Transport Instruction (TI's/Orders) can be generated.

To do this, click the **Create TIs** button - this will display a popup window allowing you to enter specific criteria for Bookings that will be included in the TI generation run.

The popup will always default the schedule name as displayed on the main Booking screen, however, it is possible to further reduce the Bookings considered for TI generation by entering values such as Source (From Location), Destination (To Location), and/or Product Type.

Once the selection criteria have been entered click the **Create TIs** button to begin the TI generation. This will display a confirmation popup message - click **OK** to proceed.

Once completed, a popup message will be displayed, detailing a total count summary of the number of Transport Instructions (Orders) generated.

The orders generated can then be viewed in the normal manner in the Orders form and also in the Trip Manipulation/Planning forms as "UNSCHEDULED" orders.

A shortcut to display the order generated from a particular booking exists in the Booking form - left click select the booking, then right click and select *View Orders*.



9.1 Constraints

In order to successfully create an Order in a **Slot**, Create TI's considers a number of constraints that can either prevent or restrict the assignment of goods to a Slot.

Create TI's can be called in two modes, Pre Schedule and Post Schedule to cater for differing requirement during the generation of a plan. Regardless of mode the constraints detailed below are considered.

9.1.1 Slot/Trailer capacity

A **Slot** will always have a Trailer assigned to it that dictates the capacity of the **Slot**. When attempting to add an Order to the **Slot** or add goods to an already existing Order in a **Slot**, the total quantity assigned cannot exceed the Trailer capacity. This allows Slots to be restricted, if necessary, by assigning a small Trailer where it is known that restricted access will only allow a small trailer to be used at a Store.

9.1.2 Slot/Product compatibilities

This constraint ensures that any **Product Type** that is to be assigned to a **Slot** is compatible with the **Slot**. Slots are configured to accept specific Product Types. As long as the goods that are to be assigned to the Slot match a Product Type configured against the **Slot** they can be delivered in the **Slot**.

9.1.3 Product Temperature compatibilities

The Trailer assigned to the **Slot** will be configured to accept specific combinations of **Product Types** and therefore Product Temperatures. When considering a **Product Type** to assign to a **Slot**, it must be compatible with any **Product Types** already assigned to the **Slot** otherwise it cannot be assigned.

9.1.4 Order Delivery Time

This constraint accepts a user specified time after which the Order must be delivered. When Create TI's considers **Slots**, any which are too early will be rejected. This allows a planner to force deliveries into later Slots where otherwise earlier **Slots** would have been used.

9.1.5 Order Depart Time

Similar to the Order Deliver Time constraint except that when Create TI's considers **Slots** any that depart too late will be rejected.

9.1.6 Product Picking Rates

The use of warehouse Pick Rates ensures that only goods that can be picked by the warehouse can be delivered at any one time. For example, if a vehicle is able to take a full load in terms of spare capacity it may not be able to if the warehouse can only pick fifty percent of the spare capacity at the time the Order must depart. Pick Rates are therefore used to determine how much of the **Product Type** in consideration can actually be assigned to a Slot at a particular time.

9.1.7 Pre Schedule

Pre Schedule Create TI's is the first pass to be invoked. This works through Slots in time order filling them with appropriate **Product Type** goods. Once these Orders are created they are sent to the scheduling process to be built into



Trips. As long as the Orders are Unscheduled they can be manipulated by this process.

9.1.8 Post Schedule

Once Orders have been scheduled onto Trips they are Scheduled. In order to add any newly received demand for delivery, Create TI's can be called in Post Schedule mode. In this mode Create TI's will attempt to top up any existing Scheduled Orders before creating new Unscheduled Orders that will subsequently require scheduling.

9.1.9 Crossdocks

Create TI's will also create **Crossdock** Orders where goods need to be delivered from one location to another via an intermediate "Crossdock" location. Typically, once the goods have been delivered to the **Crossdock** Location they are re-processed and delivered along with other goods to Stores. **C-TMS** Host will allow **Crossdock** paths to be configured which dictate a "via" location through which the Order should pass. C-TMS will actually create two Orders that are dependent on one another - one from the Origin location to the **Crossdock** location and the other from the **Crossdock** location to the final destination.



10 Tracking

10.1 Order Tracking

The Order Tracking form can be accessed from the Order management menu.

The Order Tracking form provides both Planners and Customers with a means to track the progress of **Orders** and **Trips**. The form provides a real time view enabling users based at a location to identify collections and deliveries that are planned in the near future and to act accordingly and ensure that they are ready when the truck arrives. Once the collection or delivery has been completed, actual times and quantity data can be entered and the collection or delivery confirmed. If there have been any problems with the collection or delivery such as missing documentation these details can be entered and stored in the system via the **Non Conformance** button. The actual times are then used to calculate the expected time of arrival at the next location, if the truck departed late from the first location, its expected time of arrival at the second location will be adjusted by the same time. Trips that are running behind schedule are displayed in red so that they are clearly visible to all users.

The Order Tracking form uses **Access Control** to ensure that a user can only see Trips / Orders that are appropriate to them and also offers a wide variety of filter options to further restrict what is displayed.

You can find, search and filter the orders displayed using the provided criteria at the top of the screen. By default, this will show all orders from today and forward 3 days. You can change the criteria and refresh with the **Refresh** button. You can clear the criteria with the **Clear** button.

The following activities can be carried out within the Order Tracking form:

- View provisional or completed orders / trips.
- Search for a specific order or trip by OMS Ref, Trip Reference, Customer Ref, Carrier Ref, Bill of Lading (Order), Container No (Order), Container No (Trip), Booking Ref and Order Id.
- Search for all trips / orders for a specific customer or carrier.
- Search for all trips / orders between a date range.
- Search for all trips / orders between 2 RDC / Branch / Supplied / XDock locations.



- View Load / Unload activities or a combination of both.
- Amend planned times.
- Enter actual times.
- Enter actual quantity, weight and volume.
- Confirm the Collection.
- Confirm the Delivery.
- Edit Order comments.
- Apply non-conformance reasons if any problems have occurred with the collection or delivery of an Order.
- View a specific order in the Orders form by right-clicking a line in the well and selecting *Order*.
- View a specific trip in the Trip Debrief form by right-clicking a line in the well and selecting *Trip*.
- View the SAP details of the products by right-clicking a line in the well and selecting *View SAP Details*.

Any changes you make can be saved with the **Save** button, or discarded with the **Cancel** button.

The following screen is used to enter details of any problems that occurred during the collection or delivery of the order, by clicking the **Non Conformance** button:-

The screenshot shows a 'Non conformance' dialog box. It contains the following fields and controls:

- Schedule Name:** 080120
- Trip ID:** MAN-00426977
- Customer Ref:** (empty)
- Load/Unload:** Load
- Reason Code:** A dropdown menu with a yellow highlight on the first row.
- Comments:** A text area with a yellow highlight on the first row.
- Buttons:** New, OK, Delete, Cancel.



11 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

11.1 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	☐		

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	☐		

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.

11.1.1 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

11.1.2 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

11.1.3 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.



12 Shipment Pallets

The Shipment Pallets screen allows you to see and maintain package, pallet and Waybill information created in Calidus MCS when scanning items through the network.

The screen has tabs that allow you to see all 3 elements.

12.1 Shipment Pallets Maintenance

Pallet Maintenance

The pallet Maintenance screen contains a number of search parameters:

- Depot at which the pallet was built
- The schedule the pallet is on
- The pallet ID

Once you have entered your search parameters clicking 'Refresh' will load the details into the screen.

Top Details

The details that can be viewed at the top section of the screen are:



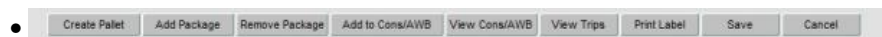
- Status (Status of the pallet Open/Closed)
- Decl Wgt (kg) - Declared weight of the pallet
- Act Wgt (kg) - The actual weight of the pallet
- Height, Length, Width - Dimensions of the pallet
- Label Printed - Tick box to show if a pallet label has been printed or not

Lower Details

The details in the bottom section of the screen contain:

- Package - The package present on the pallet
- Order - The order the package is on
- Cust Ref - Customer reference for the package

There are a number of buttons available on shipment pallet screen:



Buttons

Create Pallet

- Clicking the create pallet button generates a new pallet ID in the Pallet field

Add Package

- Clicking add package opens up a popup box where a package ID is entered once saved this then populates the package fields in the main screen

Add Package

Remove Package

- Clicking remove package will remove a package from a pallet. Note a package cannot be removed from a closed pallet. If a package is to be removed from a closed pallet the pallet must be reopened



Add to Cons/AWB

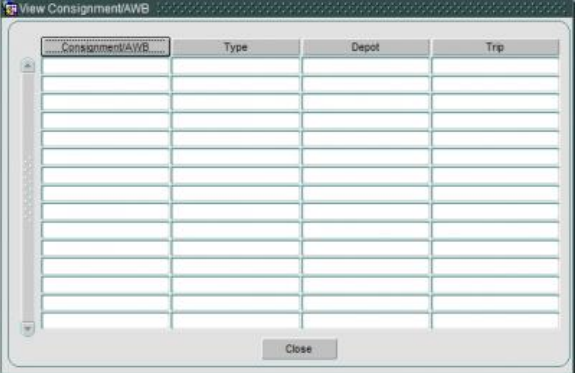
- Clicking the add to CONS/AWB button will open the Consignment and AWB entry popup box where the type is entered 'A' = Airway bill, 'C' = Consignment. The consignment or airway bill is also entered

• 

Add to Cons/AWB

View Cons/AWB

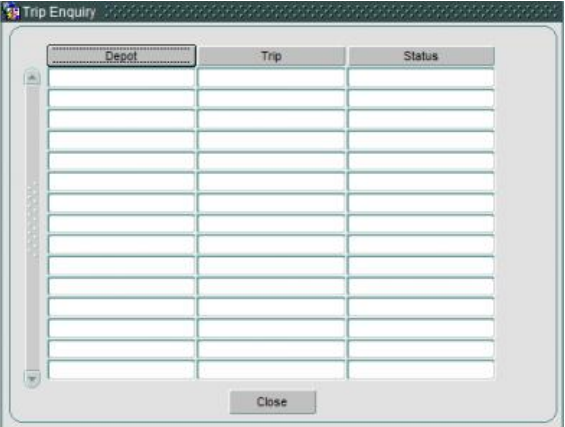
- Clicking View Cons/AWB opens up a popup box which shows the Consignment/AWB number, the type, the depot and the Trip the consignment was assigned

• 

View Cons/AWB

View Trips

- Clicking view trips opens up the trips popup box which shows the depot the trip started, the trip ID and the Status of the trip

• 

View Trips

Print Label

- Clicking 'Print Label' allows the pallet label to be printed if it has already not been printed or reprinted if it has already been printed



12.1.1 Packages Maintenance

The package Maintenance screen contains a number of search parameters:

- Depot the package is based
- The schedule the package is on
- The package ID

Once you have entered your search parameters clicking 'Refresh' will load the details into the screen.

Package Maintenance

The details that can be viewed at the top section of the screen are:

Top Details

- Status (Status of the pallet Open/Closed)
- Decl Wgt (kg) - Declared weight of the pallet
- Act Wgt (kg) - The actual weight of the pallet
- Height, Length, Width - Dimensions of the pallet
- Label Printed - Tick box to show if a pallet label has been printed or not

The details in the bottom section of the screen contain:



Lower Details

- Pallet - Pallet the package is on
- Pallet Status - The pallet status
- Trip - Trip the package is on
- Depot

There are a number of buttons available on the package maintenance screen:

Buttons

Add to Pallet

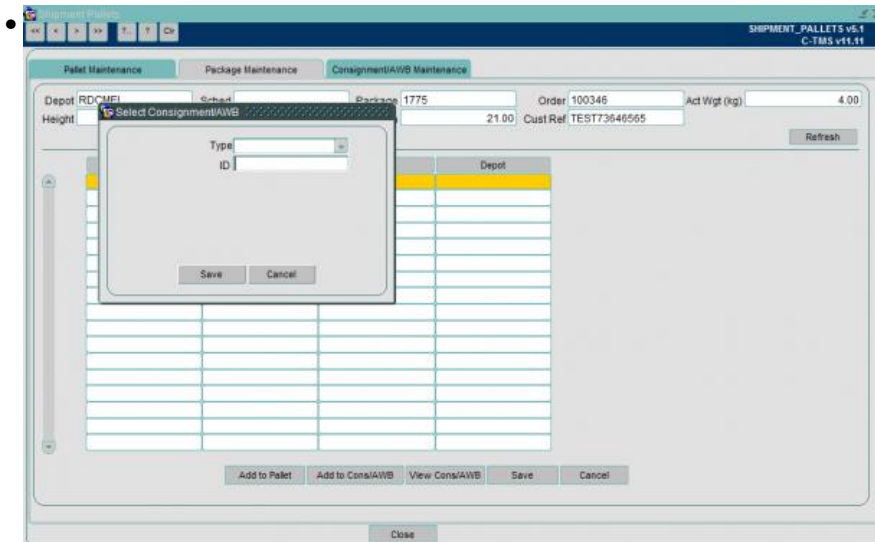
- Add to pallet opens a popup box that allows a pallet to be entered to add the package in the screen to be added to

Add to Pallet

Add to Cons/AWB

- Launches the popup screen to allow the package to be added to an Airway bill or consignment

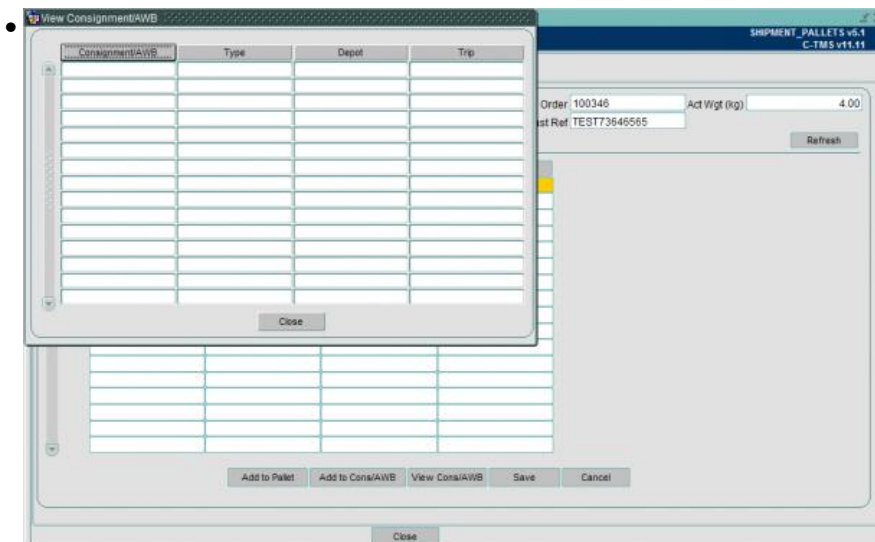




Add to Cons/AWB

View Cons/AWB

- Opens up a popup box to show the Consignment/AWB, Type, Depot and Trip the package is assigned



View Cons/AWB

12.1.2 Consignment/AWB Maintenance

The Consignment/AWB Maintenance screen contains a number of search parameters:

- Depot the package is based
- The schedule the package is on
- Consignment/AWB number

Once you have entered your search parameters clicking 'Refresh' will load the details into the screen



Consignment/AWB Maintenance

Details include:

- Piece - ID of the item on the AWB/Cons
- Piece Type - Whether it is a Pallet or loose freight
- Pallet Status - (Open or Closed) Only if it is a piece type pallet
- Height, Length, Width (cm)
- Tracking Ref - 3rd Party label reference

There are a number of functions available in the Consignment/AWB Maintenance screen:

-

Buttons

Create Cons/AWB

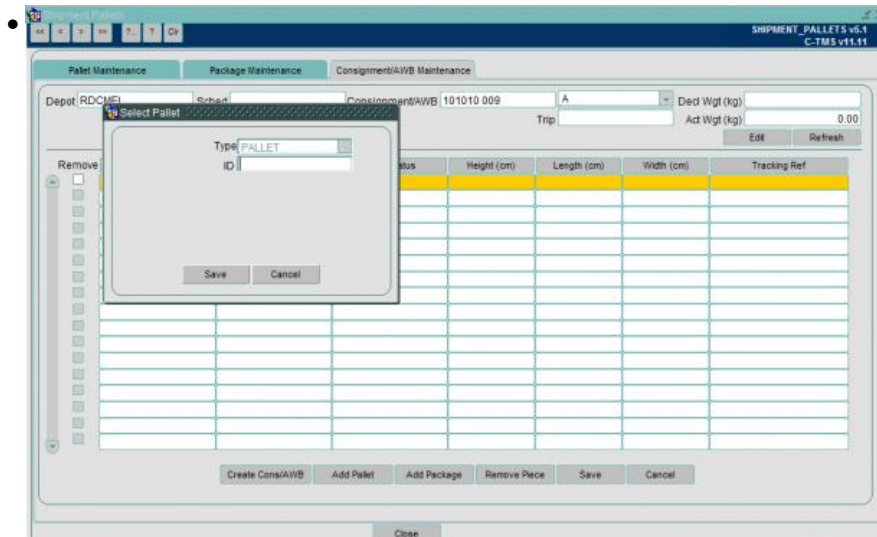
- This button opens up a popup box where a Consignment or AWB can be entered. With a type 'A' or 'C' as to whether it is a consignment or AWB

Create Cons/AWB

Add Pallet



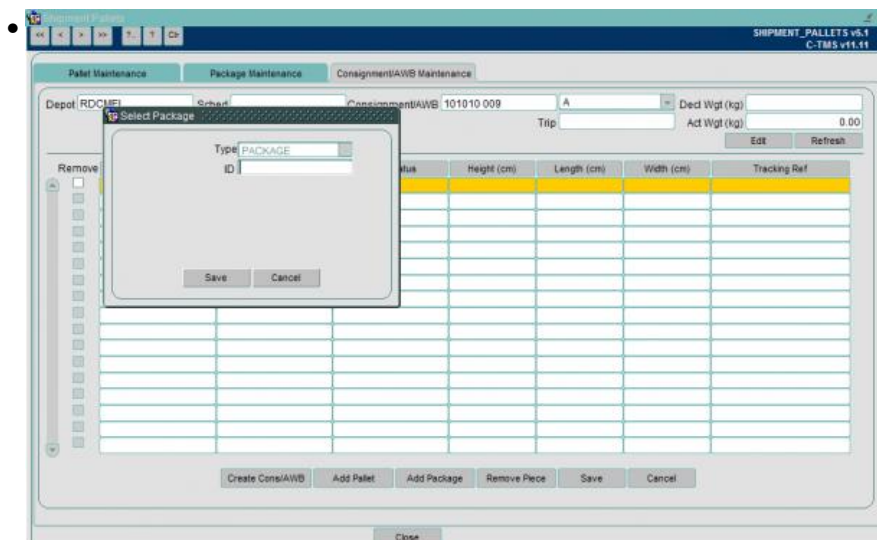
- Opens a popup box to search for a pallet ID to add to the consignment



Add Pallet

Add Package

- This opens a popup box to add a package ID to the Consignment or Airway bill



Add Package

Remove Piece

- Removes a highlighted piece from the Consignment or AWB

