

The Warehouse Maintenance page allows maintenance of warehouse level information.

For users in a group which allows "Add Warehouses" from the Maintenance/Group/TTM Options, there will be an option to create a new warehouse:

Warehouse Creation

Warehouse Id

Description

Create

For maintenance of existing warehouses, the user can select a warehouse from the initial drop-down list that is displayed and click 'Find Warehouse' - **Note:** that the list will contain only the warehouse codes visible for the user's group. The options for the selected warehouse will then be displayed:

Warehouse Selection

WH1 : WARHEOUSE 1

Options

Description

WARHEOUSE 1

Update

Delete

- Description - This will allow the description of this warehouse code to be maintained.

The user will press the 'Update' button to update details.

For users whose group allows "Add Warehouses" a Delete button will also be available to remove the warehouse from the system.

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1 Owner Maintenance - TTM

The Owner Maintenance page allows maintenance of owner level information.

For users in a group which allows "Add Owners" from the Maintenance/Group/TTM Options, there will be an option to create a new owner

For maintenance of existing owners, the user can select an owner from the initial drop-down list that is displayed in the Owner Selection section and will click 'Find Owner' - **Note:** that the list will contain only the owner codes visible for the Users Group.

The image shows two forms. The top form, titled "Owner Creation", has two input fields: "Owner" and "Description", followed by a "Create" button. The bottom form, titled "Owner Selection", has a dropdown menu showing "OBS : OBS Owner" and a "Find Owner" button.

The options for the selected owner will then be displayed.

The image shows the "Owner Options" form. It has a section for "Options" with radio buttons for "Owner" (selected) and "Customer Visibility". Below this is a "Description" field containing "OBS OWNER". The main section of the form contains several dropdown menus: "Start Of Week" (Monday), "Qty Check" (Ordered->Delivered), "Set Cancelled" (Green), "Set Claused" (Green), and "CRM Email Option" (None). There is also a "CRM Email To" text field. At the bottom, it shows "Email Notifications" with "Enabled: 1 of 28 Events" and a "Configure Events" button.

Owner Options:

- Start Of Week This defines the start of the week, used in specific pages within the module.
- Qty Check This defines the comparison used to determine short/over quantities. Values:
 - ◆ Ordered->Despatched
 - ◆ Ordered->Delivered
 - ◆ Despatched-> Delivered
- Set Cancelled Defines the RAG status for Cancelled orders. Values: Red, Amber, Green, None.
- Set Claused Defines the RAG status for Claused orders. Values: Red, Amber, Green, None.
- CRM Email Option This is used by the Order Dashboard for controlling emails for CRM. Values:
 - ◆ None
 - ◆ At Creation Only
 - ◆ At Creation And Closure
- CRM Email To The Email address (comma separated list) for admin recipients of CRMs
- Email Notifications Clicking on the Configure Events button allows the configuration of whether Tracking emails will be sent for each event type by owner. This is a different view of the event/email maintenance which is described in section 2.3 The main difference on this

page is the additional "Limit Email Frequency" flag which allows the user to set at owner level whether emails are only sent on the first instance of that message type ("Yes") or whether emails are sent each time a message of that type is



received ("No").

Event	Description	Email	Contacts	Limit Email Frequency
ALC	Order Allocated	Disabled	First contact only	No
POD	POD Confirmed	Disabled	First contact only	No
RBO	Re-Book	Disabled	First contact only	No
REC	Inbound Order Received	Disabled	First contact only	No
REN	Order Ref Change	Disabled	First contact only	No
RET	RET	Disabled	First contact only	No
SCN	Scanned	Disabled	First contact only	No
SIG	Signature Received	Disabled	First contact only	No
STA	Trip Start	Disabled	First contact only	No
VLD	Out for Delivery	Send to both delivery and collection contacts	All contacts	No
VLJ	In Transit	Disabled	First contact only	No
VUI	In Transit	Disabled	First contact only	No
PCK	Order Picked	Disabled	First contact only	No
PAC	Order Packed	Disabled	First contact only	No
ARR	Order Arrived	Disabled	First contact only	No
BOO	Booking Update	Disabled	First contact only	No
CAN	Order Cancelled	Disabled	First contact only	No
COL	Order Collected	Disabled	First contact only	No
DEL	Order Delivered	Send to delivery contact	First contact only	Yes
DEP	Order Departed	Disabled	First contact only	No
END	Delivered	Disabled	First contact only	No
LOA	Order Loaded	Disabled	First contact only	No
MAR	Order Marshalled	Disabled	First contact only	No
OIT	In Transit	Disabled	First contact only	No
ORD	Order Received	Disabled	First contact only	No
XDK	X-Dock	Disabled	First contact only	No

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[Update](#)

Customer Visibility Options:

Customer Visibility Config

Default Data Refresh: 5 Mins

Default Page Refresh 15 Seconds

Show Orders For: Today

Show Arrived For: Next hour

Keep Delayed For: Today

Show Delivered:

Delivered (Clean): Last hour

Part Delivered: Last hour

Failed Delivery: Last hour

Cancelled: Last hour

Delivery Window:

Before: 15 Mins

After: 15 Mins

These options relate to the Customer Visibility Page / Order Dashboard. See section 3.3 for more details.



2 Event Maintenance

The Event Maintenance page allows maintenance of system events.

The screenshot displays the Event Maintenance interface. It features two main tables for configuring events and a form for creating location-based events.

Warehouse / Order Events Table:

Event	Description	Custom Description	Enquiry Display	Enabled	Email	Setup
ORD	Order Received		Yes	1 of 12 Owners		Setup
REC	Inbound Order Received		Yes	0 of 12 Owners		Setup
ALC	Order Allocated		Yes	0 of 12 Owners		Setup
PCK	Order Picked		Yes	0 of 12 Owners		Setup
PAC	Order Packed		Yes	0 of 12 Owners		Setup
MAR	Order Marshalled		Yes	0 of 12 Owners		Setup
LOA	Order Loaded		Yes	0 of 12 Owners		Setup
OIT	In Transit		Yes	0 of 12 Owners		Setup
DEL	Order Delivered		Yes	0 of 12 Owners		Setup
XDK	X-Dock		Yes	0 of 12 Owners		Setup
POD	POD Confirmed		Yes	0 of 12 Owners		Setup
SCN	Scanned		Yes	0 of 12 Owners		Setup
SIG	Signature Received		Yes	0 of 12 Owners		Setup
CAN	Order Cancelled		Yes	0 of 12 Owners		Setup
REN	Order Ref Change		Yes	0 of 12 Owners		Setup

Transport / Trip Events Table:

Event	Description	Custom Description	Enquiry Display	Enabled	Email	Setup
TRP	Trip Update		Yes			Setup
TRD	Trip Delete		Yes			Setup
BOO	Booking Update		Yes	0 of 12 Owners		Setup
RBO	Re-Book		Yes	0 of 12 Owners		Setup
STA	Trip Start		Yes	0 of 12 Owners		Setup
ETA	ETA Update		Yes			Setup
COL	Order Collected		Yes	0 of 12 Owners		Setup
DEP	Order Departed		Yes	0 of 12 Owners		Setup
VUI	In Transit		Yes	0 of 12 Owners		Setup
VLI	In Transit		Yes	0 of 12 Owners		Setup
VLD	Out for Delivery		Yes	0 of 12 Owners		Setup
ARR	Order Arrived		Yes	0 of 12 Owners		Setup
END	Delivered		Yes	0 of 12 Owners		Setup

Location Events Form:

Event Type: COL : Order Collected | Activity: Load | Location From: | Location To: | Add Event

Event	Description	Activity	From Location	To Location	Custom Description	Enquiry Display	Remove
VLI	In Transit	LOAD	LOC1	LOC2		Yes	<input type="checkbox"/>

Remove

Standard Events

Warehouse/Order Events and Transport/Trip Events are the standard events that the *Calidus* Portal system can process. The user can enter a custom description to override the default (note: this will apply to all owners/users on the system) and control whether that event type is displayed on the Events Page of the enquiry - this includes allowing only internal user groups visibility of the event. If enabled, each event has a button which will take the user into the Event Email maintenance page. See section 2.3.1 for details.

Location Events

Location Events allow the user to breakdown an Order/Trip event type so that an event e.g. DEP (Departure) may be split by activity and location. These events will only be available if configured:

Module	Section	Key	Admin	Description	Value
TTM		LOC_EVENTS			
TTM	TTM - EVENT_CONFIG	LOC_EVENTS	N	Use additional Location based Events?	Yes

A creation section will be available to add a new Location level event:

The screenshot shows the Location Events form with the Event Type dropdown menu open, displaying a list of event types for selection.

Event Type: COL : Order Collected | Activity: Load | Location From: | Location To: | Add Event

Activity From Location To Location Custom Description Enquiry Display Remove

LOAD LOC1 LOC2

Remove

The user will be able to select one of the event types from the dropdown shown in the screenshot above. They will then select the activity at the location - either LOAD or UNLOAD. Finally they will enter the types of location From/To, for example SUPPLIER, RDC, AIRPORT or BRANCH. The location text boxes will be free-text and the entered text will be upshifted. The values entered by the user should correspond to a location type setup on the corresponding *Calidus* TMS system (or whichever system is sending the relevant messages) but note that the entries will **not** be validated. Both a From and To location will be required.


When the user clicks on the 'Add Event' button, the location event will be created and the data will be refreshed. Please note that clicking the 'Add Event' button will *only* add the event - if any of the other data has changed, then this will *not* be updated - the user should use the 'Update' button before adding new events, if they have made any changes.



2.1 Event Email Maintenance

The Event Email Maintenance page allows the user to setup outbound email alerts from the TTM system when an XML file for the event type is received. A separate email layout can be created for each individual standard event.

Subject

A text area will be available to define the Subject of the email. Clicking on the Data Field icon  will display the following drop-down:

Selecting a data field from the drop-down will insert a marker into the subject which will be replaced with the actual data element from the order when the email is sent.

The subject will contain no text formatting options and should be restricted to a single line.

Body

The body section of the email will allow for text formatting e.g. bold, font-size, font-type (from a specific selection), alignment etc. and will also allow the insertion of URL links and images (but **only** via a link to an image stored on the internet i.e. a URL link to an image available on an existing website)

The data field drop-down will be available, but will contain an extra option to allow the insertion of a *Calidus Portal Gateway* tracking link. See the TTM gateway section for more details.



At the foot of the page, there is a text box and a 'Test Email' button to allow the user to send a test email to view what the email will look like when received, with the data fields translated, for example:

Owner
TEST OWNER
Order
TEST ORDER
Expected Delivery Date
01-Jan-2015 12:34

Tracking URL
<http://www.obs-logistics.com> (Note: Test only - Actual tracking URL will be used)



NOTE: The format of email may not be an exact match for display on the maintenance page - the user should confirm the layout (after saving) with a test email.

NOTE: Only a single format of email can be defined per Event Type, so for example, it would not be possible to include owner specific logos etc.



3 System Reason Code Maintenance

The System Reason Code Maintenance page allows maintenance of reason codes.



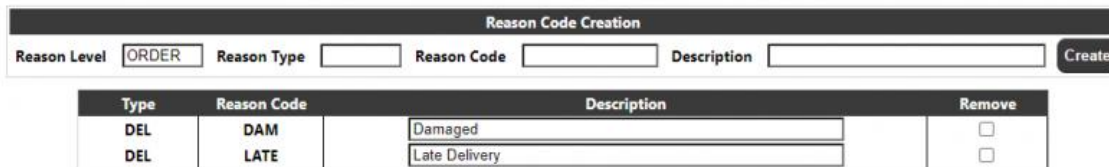
A dropdown menu titled "Reason Level Selection". The "Reason Level" label is to the left of a dropdown box. The dropdown box has a downward arrow and shows three options: "Order", "Stop", and "Item". The "Order" option is currently selected and highlighted in blue. To the right of the dropdown is a "Find" button.

The user may create reason codes using the header section of the page, selecting the appropriate Reason Level:

- STOP Trip/stop level codes displayed in the Trip/Stop enquiry (see section 3.1.1).
- ORDER Order level code displayed in the Order Enquiry Reasons tab (see section 3.1.2.5).
- ITEM Order detail level codes displayed in the Order Enquiry Detail tab (see section 3.1.2.43.1.2.5).

Once the user clicks 'Find' the existing reason codes will be displayed, along with a Reason Code Creation section which can be used to add new Reason Codes.

The user can update the description or remove the reason code(s).



A form titled "Reason Code Creation". It has four input fields: "Reason Level" (set to "ORDER"), "Reason Type" (empty), "Reason Code" (empty), and "Description" (empty). A "Create" button is to the right. Below the form is a table with four columns: "Type", "Reason Code", "Description", and "Remove".

Type	Reason Code	Description	Remove
DEL	DAM	Damaged	<input type="checkbox"/>
DEL	LATE	Late Delivery	<input type="checkbox"/>

Note: The Reason Type is specific to the type of the reason codes being created e.g. DEL for delivery reasons, or CSRC for Customer Service reason codes. These types will be supplied by OBS.

Note: Reason codes sent in via XML upload will *automatically* get created on the reason codes table if they do not exist.



4 Customer Maintenance

The Customer Maintenance page allows maintenance of Address and Customer Information for customers on the *Calidus* Portal system.

Customer Selection	
OBS : OBS Owner	C-1 : customer_description

Customer Address	
customer_description	
customer_add_1	
customer_add_2	
customer_add_3	
customer_add_4	
customer_add_5	

Customer Information	
Opening Hours	opening_hrs
Goods In Contact Details	contact_1
General Site Contact Details	contact_2
Other Contact	contact_3
Site Restrictions	site_restrictions
Comment	comment

Update

The user will select an owner then the customer they want to maintain. They can then modify the Customer Address and Customer Information.

Note: None of the "Customer Information" fields above are currently sent to the *Calidus* Portal system via XML, so this is the only place where these fields can be entered/maintained.

Note: Any data changed on this page will **only** apply to the *Calidus* Portal - data updates will not be transmitted to external systems.



5 Customer Group Maintenance

The Customer Group Maintenance page allows maintenance of customer group information.

The screenshot displays the 'Customer Group Maintenance' interface. It consists of three main sections:

- Customer Group Creation:** A form with fields for 'Customer Group', 'Description', and 'Owner' (a dropdown menu showing 'OBS : OBS Owner'). A 'Create' button is located to the right of the 'Owner' field.
- Customer Group Selection:** A section with a dropdown for 'Owner' (showing 'OBS : OBS Owner') and a dropdown for 'Customer Group' (showing 'None - Un-Grouped'). Below these are 'Find' and 'Delete' buttons.
- Table:** A table with columns: 'Customer', 'Description', 'Town', 'PostCode', and 'Select'. The first row contains the values 'C-1', 'customer_description customer_add_1', 'customer_add_3', 'customer_add_3', and a checkbox. Below the table is a 'Navigation' bar with '1/1' and 'No. Rows: 15'. To the right of the table are 'Select All' and 'Clear All' buttons.
- Move/Copy/Remove Selection:** A section with a dropdown for 'Move To Group' (showing 'GRTEST - GRTEST') and a 'Move' button.

The user has the option to create a new customer group by entering a Customer Group, Description and Owner in the 'Customer Group Creation' section of the page. The list of owners is limited to those assigned to the users group. The customer group will initially be created with no customers in the group. The customer group may be deleted by pressing the 'Delete' button (though the 'None' group cannot be deleted).

Once created, the new customer group or any existing customer group (visible to the user) can be selected from the drop-down. Initially, all new customers uploaded onto the system will be assigned into the group 'NONE'.

Selecting a customer group from the drop-down will bring up a list of the customers currently in the selected group. The customer, description (consisting of description and address line 1), town and post code will be displayed along with a tick box for selecting customer to process.

The user may Move or Copy selected Customers from one group to another (or back into the 'NONE' group).

Moving a customer will take the customer out of the existing group, and move it to the new group.

Copying a customer will leave the customer in the existing group, but also copy it to the new group.

The user also has the ability to remove a customer from the currently selected group (unless the group is 'NONE').



6 Order Enquiry

6.1 Parameter Selection Page

The Parameter Selection page allows the user to enter search criteria to enquire by Trip or Order. The parameters displayed for both the Trip and Order selections are configurable using the Custom Page configuration page (see the *Calidus Portal CORE* documentation) - the screenshots below show all of the available parameter fields.

Customer Order No:

Parameter Selection			
Owner / Haulier	Owner Or Haulier <input type="text"/> <input type="text"/>		
Owner	OBS&TEST : OBS&TEST [D] <input type="text"/>		
Order Type	All <input type="text"/>	Order Sub Type	<input type="text"/>
Customer Order No.	<input type="text"/>		
Booking Ref	<input type="text"/>	TMS Ref	<input type="text"/>
	PO Reference <input type="text"/>		
Date Created	From <input type="text"/>	To <input type="text"/>	
Date Created	From <input type="text"/>	To <input type="text"/>	
Booking Date	From <input type="text"/>	00:00 To <input type="text"/>	23:59
Delivery Date	From <input type="text"/>	00:00 To <input type="text"/>	23:59
Order Status	Equals <input type="text"/>	All <input type="text"/>	
Order Priority	<input type="text"/>		
Order Reference 1	<input type="text"/>	Order Reference 2	<input type="text"/>
Item Id	<input type="text"/>	Item Status	<input type="text"/>
Reservation No	<input type="text"/>		
Batch id	<input type="text"/>	Serial No	<input type="text"/>
Customer Group	Not Available		
Customer Account Code	<input type="text"/>		
Tracked	All <input type="text"/>	Late Reasons	N/A <input type="text"/>
	Delivery Exceptions <input type="text"/>		
Haulier	Equals <input type="text"/>	Any <input type="text"/>	
Vehicle	<input type="text"/>		
Sort Sequence	Clean / Exceptions <input type="text"/>	Ascending <input type="text"/>	
Export Level	None <input type="text"/>		

Trip ID:

Parameter Selection	
Trip ID	<input type="text"/>
ETA	All <input type="text"/>
Trip Status	All <input type="text"/>
Trip Start Date	From <input type="text"/> To <input type="text"/>
Trip Schedule	<input type="text"/>
Trip Ref.	<input type="text"/>
Owning Group	<input type="text"/>
Last Update Date	From <input type="text"/> To <input type="text"/>
Tractor	<input type="text"/>
Trailer	<input type="text"/>
Tracked	All <input type="text"/> Late Reasons N/A <input type="text"/> Delivery Exceptions <input type="text"/>
Haulier	Equals <input type="text"/> Any <input type="text"/>
Vehicle	<input type="text"/>
Sort Sequence	Clean / Exceptions <input type="text"/> Ascending <input type="text"/>
Export Level	None <input type="text"/>



A description of some of the main selection criteria are as follows:

Order Specific:

- Owner - A drop-down of available owners, as determined by the restrictions set against the users group.
- Warehouse ID - the originating warehouse of the order.
- Client Order No - this will be the unique identifier for an order on the system.
- Booking Ref, *Calidus* TMS Ref & PO Ref - various references associated with the order.
- Order Date From/To - a date range with calendar lookup.

This is the transaction date from the ORD XML and should correspond to the date order was uploaded onto the LOTS system

- Book Date From/To - The Date the order was booked
- Delivery Date From/To - a date and time range with a calendar lookup for the date,
- Customer Group From/To - a drop-down range of available Customer Groups, if enabled for the Users group.
- Customer Account Code - this will be the *Calidus* WMS Customer Code.
- Current Order status - Selected from a drop-down of the Status Trigger points.

Trip Specific:

- Trip ID - The trip/journey.
- Current Trip Status - A drop-down with values 'All', 'En-Route', 'Complete' and 'Abandoned'. This information will be supplied by the *Calidus* TMS system.
- Trip Schedule - The schedule for a trip, if supplied from the *Calidus* TMS system.
- Trip Ref - Reference ID for the Trip
- Owning Group - The owning group/pool supplied from the *Calidus* TMS system.
- Tractor - The Tractor for the trip, supplied from the *Calidus* TMS system.
- Trailer - The Trailer for the trip, supplied from the *Calidus* TMS system.

Both:

- Haulier - A drop-down of all hauliers visible to the user.
- Sort Sequence - A drop-down with values from the above selections which determines the sequence of the results returned and displayed.
- Export - This will allow the export of the selected data at a trip, trip/order, order or order detail level dependent on the selection.

The defaults for all of these fields, if not entered, will be 'All Available'.

The values entered in the enquiry screen will be stored for the length of the user's session, so that if they return to the enquiry Parameter page, the last used parameters will be re-displayed. Closing the session or pressing the 'Reset' button will clear the stored parameters.

When the user clicks the 'Find' button the system will retrieve all orders matching the selected criteria and the results page will be displayed (see section 3.1.2). If no orders are found, the page will be displayed with 'No Data Selected'.

6.1.1 Enquiry Results Page



Owner	Order No	Order Type	Delivery Type	TMS Ref	PO Reference	Customer	Booking Ref	Order Status	Date Created	Cust. Order Date	Booking Date	Signed By	Delivery Date	Col. Trip ID	Del. Trip ID
D	085	28348-032	Delivery	DT-4	T29032	P29032	C-1 CUSTOMER-1	829032	Order Delivered	14-Apr-23 08:47	14-Apr-23 16:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329032	OBS-TRP-230329032
D	085	34774-033	Delivery	DT-5	T29033	P29033	C-1 CUSTOMER-1	829033	Order Marshalled	14-Apr-23 08:47	14-Apr-23 15:00			OBS-TRP-230329033	OBS-TRP-230329033
D	085	38448-034	Delivery	DT-6	T29034	P29034	C-1 CUSTOMER-1	829034	Order Marshalled	14-Apr-23 08:47	14-Apr-23 17:00				
D	085	98259-035	Delivery	DT-9	T29035	P29035	C-1 CUSTOMER-1	829035	In Transit	14-Apr-23 08:47	14-Apr-23 13:00			OBS-TRP-230329035	OBS-TRP-230329035
D	085	51580-036	Delivery	DT-7	T29036	P29036	C-1 CUSTOMER-1	829036	Order Marshalled	14-Apr-23 08:47	14-Apr-23 16:00				
C	085	97708-037	Delivery	DT-4	T29037	P29037	C-1 CUSTOMER-1	829037	Order Delivered	14-Apr-23 08:47	14-Apr-23 13:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329037	OBS-TRP-230329037
C	085	36226-038	Delivery	DT-4	T29038	P29038	C-1 CUSTOMER-1	829038	Order Delivered	14-Apr-23 08:47	14-Apr-23 12:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329038	OBS-TRP-230329038
C	085	36998-039	Delivery	DT-6	T29039	P29039	C-1 CUSTOMER-1	829039	In Transit	14-Apr-23 08:47	14-Apr-23 18:00			OBS-TRP-230329039	OBS-TRP-230329039
C	085	33720-040	Delivery	DT-2	T29040	P29040	C-1 CUSTOMER-1	829040	Order Delivered	14-Apr-23 08:47	14-Apr-23 16:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329040	OBS-TRP-230329040
C	085	48474-041	Delivery	DT-8	T29041	P29041	C-1 CUSTOMER-1	829041	Order Delivered	14-Apr-23 08:47	14-Apr-23 12:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329041	OBS-TRP-230329041
D	085	62554-042	Delivery	DT-4	T29042	P29042	C-1 CUSTOMER-1	829042	Order Delivered	14-Apr-23 08:47	14-Apr-23 14:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329042	OBS-TRP-230329042
D	085	34896-043	Delivery	DT-4	T29043	P29043	C-1 CUSTOMER-1	829043	In Transit	14-Apr-23 08:47	14-Apr-23 14:00			OBS-TRP-230329043	OBS-TRP-230329043
D	085	46071-044	Delivery	DT-8	T29044	P29044	C-1 CUSTOMER-1	829044	Order Received	14-Apr-23 08:47	14-Apr-23 11:00				
C	085	88042-045	Delivery	DT-3	T29045	P29045	C-1 CUSTOMER-1	829045	Order Delivered	14-Apr-23 08:47	14-Apr-23 16:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329045	OBS-TRP-230329045
D	085	80850-046	Delivery	DT-1	T29046	P29046	C-1 CUSTOMER-1	829046	Order Delivered	14-Apr-23 08:48	14-Apr-23 13:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230329046	OBS-TRP-230329046
D	085	71592-047	Delivery	DT-9	T29047	P29047	C-1 CUSTOMER-1	829047	In Transit	14-Apr-23 08:48	14-Apr-23 18:00			OBS-TRP-230329047	OBS-TRP-230329047
D	085	41130-048	Delivery	DT-2	T29048	P29048	C-1 CUSTOMER-1	829048	In Transit	14-Apr-23 08:48	14-Apr-23 17:00			OBS-TRP-230329048	OBS-TRP-230329048
D	085	53649-049	Delivery	DT-5	T29049	P29049	C-1 CUSTOMER-1	829049	Order Received	14-Apr-23 08:48	14-Apr-23 12:00				
D	085	48832-050	Delivery	DT-4	T29050	P29050	C-1 CUSTOMER-1	829050	In Transit	14-Apr-23 08:48	14-Apr-23 15:00			OBS-TRP-230329050	OBS-TRP-230329050
D	085	16380-001	Delivery	DT-3	T30001	P30001	C-1 CUSTOMER-1	830001	Order Received	14-Apr-23 12:03	14-Apr-23 15:00				
C	085	65889-001	Delivery	DT-1	T30001	P30001	C-1 CUSTOMER-1	830001	Order Delivered	14-Apr-23 08:48	14-Apr-23 18:00	MMHOUSE	14-Apr-23 08:32	OBS-TRP-230330001	OBS-TRP-230330001
D	085	84838-001	Delivery	DT-0	T30001	P30001	C-1 CUSTOMER-1	830001	Order Delivered	14-Apr-23 15:11	14-Apr-23 15:00	MAIN-230330001		MAIN-230330001	
D	085	62337-002	Delivery	DT-6	T30002	P30002	C-1 CUSTOMER-1	830002	Order Received	14-Apr-23 08:48	14-Apr-23 20:00				
D	085	97732-002	Delivery	DT-6	T30002	P30002	C-1 CUSTOMER-1	830002	Order Delivered	14-Apr-23 15:11	14-Apr-23 15:00			MAIN-230330002	MAIN-230330002
D	085	93795-002	Delivery	DT-2	T30002	P30002	C-1 CUSTOMER-1	830002	Order Delivered	14-Apr-23 12:05	14-Apr-23 18:00	MMHOUSE	14-Apr-23 12:06	OBS-TRP-171030002	OBS-TRP-171030002

Export Level Order Export

Navigation 112 25 No. Rows 25

Back

A section at the top of the page (visibility configurable) will allow additional filtering of certain data.

The first column will be a RAG status field (C/D/X) with the following values:

- Blank/White - If order less than status 'Order Delivered' and Order is Clean
- X/Amber - If order is less than status 'Order Delivered' and Order has Exceptions
- C/Green - If order is status 'Order Delivered' and Order is Clean without Exceptions
- D/Red - If order is status 'Order Delivered' and Order has any 'Quantity' Exceptions

Hovering over the Order No field for around a second will show selected information for the order:

28348-032	
34774-033	
38448-034	
98259-035	
51580-036	OBS/51580-036
97708-037	
36226-038	
36998-039	
33720-040	
48474-041	
62554-042	
34896-043	
46071-044	
88042-045	
80850-046	
71592-047	
41130-048	
53649-049	

Delivery Address

BT78
445 Line 1
445 Line 2
445 Line 3
BT78
BT78 3ET GB

Order Type Delivery **Delivery Type** DT-7 **Service Supplied** N

Authority Code n/a **Order Status**

Del. Trip ID **Trip Status**

Trip Tracked N **Del. Stop Id** 0 **ETA**

Haulier **Driver** **Trailer**

Tractor **Customer** C-1 **TMS Ref** T29036

PO Reference P29036 **Booking Ref** 829036 **Booking Date** 14-Apr-23 16:00

Date Created 14-Apr-23 08:47 **Date Created** 14-Apr-23 08:00 **Departure Date**

Arrival Date **Delivery Date** **Collection Date**

Signed By

Clicking on the order will take the user to the enquiry results detail page to display full details for the selected order (see section 3.1.2)

Details of a selection of the fields i.e. the most commonly displayed, are as follows:

- Owner - The Customer ID
- Client Order No - The unique Order reference (<SO_REF>).
- TMS Ref - The OMS ref from the Calidus TMS system (<TMS_REF>)
- Customer - The Customer Name and Town.
- Booking Ref - The Booking Reference assigned to the order (<BOOK_REF>).
- Status - The current status of the order.
- Date Created - Date the order was uploaded into the LOTS system
- Customer Order date - The date the customer raised the order



- Booked Date - The <BOOK_DATE> of the ORD message, or the date/time from the last BOO (Booking) update message.
- Delivered Date - The <CONF_DATE> from the DEL message, if supplied, otherwise the <ORDER_TRANSACTION_DATE> of the DEL message.
- Delivery Trip ID - The *Calidus* TMS Trip ID on which the order is to be delivered to its final destination. Clicking on the trip will take the user to the Trip View page (see section 3.1.1).

Hovering over a Trip (Collection or Delivery) for around a second will show selected information for the trip:

OBS-TRP-230329037											
Seq	Group Name	Activity	Location	Location Name	Trip ID	Stop	Haulier	Driver	Planned Arrival	Actual Arrival	Planned Departure
1	OBS	PK	2401	RG14	OBS-TRP-230329037	1	OBS HAULIER 4	OBS Driver 4	14-Apr-23 08:00	14-Apr-23 08:00	14-Apr-23 09:00
2	OBS	DL	1864	ML5	OBS-TRP-230329037	2	OBS HAULIER 4	OBS Driver 4	14-Apr-23 12:00	14-Apr-23 11:00	14-Apr-23 14:00

Clicking on the trip in this section will take the user to the Trip View page (see section 3.1.1).

A section at the bottom of the page will allow the user to navigate through the pages of retrieved data and also to export data to XLS



6.1.2 Enquiry Results Trip View

If the user has entered parameters on the Trip Parameter page or has clicked on a trip from the Enquiry results page then this page will be displayed:

OBS-TRP-230331019											
Trip Ref: TR-50832 Haulier: OBS HAULIER 3 Driver: OBS Driver 3 Contact: 265263690 Last Update: 31-Mar-23 08:30 Schedule: 230331 Tractor: TRAC30 Trailer: TRAIL084 Owning Group: OBS Trip Comment: Trip Comment...											
Stop	Type	Address	Planned Arrival	Current ETA	Actual Arrival	Signature	Status	Stop R/C	E	B	
1 (PID: 1230)	Pickup	GU18 1230 Line 1 GU18 GU18 SXJ	31-Mar-23 09:00		31-Mar-23 07:00	N	Arrived On Time				
1	Cal/Del	Owner	Customer Order No.	Reasons	TMS Ref	Booking Ref	No. Parts	Ordered	Delivered		
	Pickup	OBS	10471-019	None	T31019	831019	2	718	718		
2 (PID: 1975)	Delivery	NG15 1975 Line 1 NG15 NG15 BGE	31-Mar-23 14:00		31-Mar-23 13:00	Y	Arrived On Time				
1	Cal/Del	Owner	Customer Order No.	Reasons	TMS Ref	Booking Ref	No. Parts	Ordered	Delivered		
	Delivery	OBS	10471-019	None	T31019	831019	2	718	718		

The order information may also be minimised:

Stop	Type	Address	Planned Arrival	Current ETA	Actual Arrival	Signature	Status	Stop R/C	E	B
1 (PID: 1230)	Pickup	GU18 1230 Line 1 GU18 GU18 SXJ	31-Mar-23 09:00		31-Mar-23 07:00	N	Arrived On Time			
2 (PID: 1975)	Delivery	NG15 1975 Line 1 NG15 NG15 BGE	31-Mar-23 14:00		31-Mar-23 13:00	Y	Arrived On Time			

At the stop level of detail:

The signature will display Y or N to indicate if a signature has been uploaded for this stop. If a signature has been uploaded then clicking the "Y" value link will display the uploaded signature.





There will be a 'RAG' indicator for the delivery status of the stop:

- White - On Time (but Undelivered). The system has an expected date but no actual date has yet been received by the system and the current time is less than the expected date/time.
- Amber - Late (but Undelivered). The system has an expected date with no actual date and the current time is now greater than the expected date/time.
- Green - Arrived On Time. The system has received both an expected and actual date/time for the stop and the actual date/time was less than or equal to the expected.
- Red - Arrived Late. The system has received both an expected and actual date/time for the stop and the actual date/time was greater than the expected.

If Stop level reasons exist, clicking this button will display a table of the stop level reasons.

By Clicking on the '+' button next to each stop, order level information may be accessed:

	Col/Del	Owner	Customer Order No.	Reasons	TMS Ref	Booking Ref	No. Parts	Ordered	Delivered
1	Pickup	OB5	10471-019	 View	T31019	B31019	2	718	718

Clicking on an order within this section will take the user to the enquiry results detail page to display full details for the selected order (see section 3.1.2).

The 'RAG' status indicator in the order section will have the following values:

- White Not yet delivered.
- Green Delivered and Qty Ordered equals Qty Delivered.
- Red Delivered and Qty Ordered does not equal Qty Delivered.

As with the Stop level information, if Order level reasons exist, clicking this button will display a table of the order level reasons.

At the foot of the page, a section will allow the user to export data or add a reason code against either a stop or order level:

Add Reason: Level Owner Customer Order No. Type Code Comment

Export Level

To add a reason code, the user should first select the Level, either Order or Stop. Depending on this selection, either a Stop drop-down list or Owner/Order drop down lists will be displayed. Once the user has selected the required stop or Owner/order, they should select a reason type from the list of available types (which will be any type for the reason level which exists on the system). Once a type has been selected, all existing reason codes for that type will be displayed and the user should select the reason code they require. Finally, the user can optionally enter a comment then click 'Add' to add the reason code. The page will be refreshed and the reason code will be displayed against the appropriate stop or order.

6.1.3 Enquiry Results Order View

The enquiry results detail page displays information for the selected order and a choice of view for the details.

A brief header section will display selected information from the order:



OBS / 94836-010

Order Type: Delivery

Order Status: Order Delivered [Exceptions]

Warehouse: WH1

Order Priority: TLC

Date Created: 30-Mar-23 06:00

Delivery Date: 30-Mar-23 15:11

Signed By: OBS

Booking Ref: 830010

TMS Ref: T30010

PO Reference: P30010

Distribution Code: Carrier: HAULO OBS HAULER 0

Service: SERVICES7

Customer: C-1 CUSTOMER-1

Delivery Address: 1770 Line 1, M34, M34 2JU

No. Parts: 3

Events	Info	Route	SO Details	Reasons	Map	Notes	Documents				
	Source	Transaction Date	Event Type	Event	Trip ID	Stop	Location	Activity	Ordered	To Deliver	Delivered
1	WMS-OBSGEN	30-Mar-23 06:00	ORD	Order Received					2,262	2,262	
2	TMS-OBSGEN	30-Mar-23 06:00	TRP	Trip Update	MAN-230330010	1	M34	Collect	2,262	2,262	
3	TMS-OBSGEN	30-Mar-23 06:00	TRP	Trip Update	MAN-230330010	2	M31	Deliver	2,262	2,262	
4	TMS-OBSGEN	30-Mar-23 17:00	DEL	Order Delivered	MAN-230330010	2	M31	Deliver	2,262	2,262	1,131

Delivery POD

Delivery POD

For the display of further details, the user can select between:

- Events - the Messages received by the LOTS system via *Calidus* WMS, *Calidus* TMS and other systems.
- Info - Details of all of the header information stored on the system
- Route - Details of the trips/stops that the order is currently assigned to.
- SO Details - the Stock details received from the *Calidus* TMS or *Calidus* WMS.
- Reasons - Details of the Order level reasons placed against the order.
- Map - A map of the current location of the order (if co-ordinates have been supplied by an external system). The Mapping page will only be available to groups where the 'Mapping' parameter against the User Group is set to 'Available' and where licensing is available.
- Notes - Allows the entry of user notes against the order. These are only kept on the *Calidus* Portal system.
- Documents - Allows the upload/view of documents held in the *Calidus* Portal against the order.

If the application is configured for Vehicles, and the order is a service order, an additional Vehicles tab will be displayed:

Events	Info	Route	SO Details	Reasons	Vehicles	Map	Notes	Documents
--------	------	-------	------------	---------	----------	-----	-------	-----------

At the base of the page, a drop-down and button will be available to export selected data:

Export Level

6.1.3.1 Enquiry Results Order View - Events

The Events tab will display of all of the event information stored on the system for the selected order:

Events	Info	Route	SO Details	Reasons	Map	Notes	Documents				
Source	Transaction Date	Event Type	Event	Trip ID	Stop	Location	Activity	Ordered	To Deliver	Delivered	
1 WMS-OBSGEN	30-Mar-23 08:00	ORD	Order Received					476	476		
2 TMS-OBSGEN	30-Mar-23 08:00	TRP	Trip Update	MAN-230330005	1	SE17	Collect	476	476		
3 TMS-OBSGEN	30-Mar-23 08:00	TRP	Trip Update	MAN-230330005	2	DN4	Deliver	476	476		
4 TMS-OBSGEN	30-Mar-23 13:00	DEL	Order Delivered	MAN-230330005	2	DN4	Deliver	476	476	0	

- Sequence - A numeric sequence for the event.
- Source - The source of the message e.g. WMS, TMS or LOTS. Hovering over this field displays the name of the XML file upon which this event was loaded.
- Transaction Date - The transaction date/time of the event - this is the date and time that the transaction was transacted on the source system, if supplied, otherwise the date/time received by the *Calidus* Portal.
- Event Type - The code for the event.
- Event - A description of the event. Only events which are flagged as visible or which have been set to a specific group type which matches the users group will be displayed.
- Trip Id - For trip based messages, the relevant trip will be displayed. This allows the user to see any changes in the trip history of the order. Clicking on the trip will take the to the Trip / Drop view page (section 3.1.1).
- Stop - The stop assigned to the trip/order event.
- Location - The Id of the delivery/pickup location
- Activity - The activity associated with the event.
- Ordered / To Deliver / Delivered - Quantity figures displayed from those supplied on the message or confirmed on the system - these default to the quantities on the previous table row if they are not present.

Note: If multiple events have been received for the same event type and trip/stop (if supplied) the duplicate events will be hidden by default. A button will be displayed underneath the events which can be used to show these duplicates.



Below the events, the page can conditionally include up to four links/buttons:

- **Delivery/Collection POD** - This is a link to the POD on an external system. This link is only shown if the POD format and URL are set and the order is at an appropriate status.
- **Service Report** - This is a link to the Service Report on an external system. This link is only shown for orders of type 'Service' and where the Service format and URL are set and the order is at an appropriate status.
- **TTM POD** - This link shows a POD document that has been stored on the *Calidus* Portal server. This link is only shown if a POD document exists for this order.
- **TMS Labels** - This is a link to the *Calidus* TMS labels for this order. This link is only shown if the *Calidus* Portal system is configured to have a *Calidus* TMS URL.

6.1.3.2 Enquiry Results Order View - Info

The Info tab will display all of the header information stored on the system for the selected order. Most of the fields can be configured to be displayed or hidden at a system level.

Order Information:

Events							
Info							
Route							
SO Details							
Reasons							
Map							
Notes							
Documents							
Order Information							
Order Type	Delivery	Order Sub Type	1	Year	2023	Order Status	Order Delivered [Exceptions]
Placed By	OBSUSER	Carrier	HAUL9 OBS HAULER 9			Service	SERVICE60
Delivery Address	[C-1] CUSTOMER-1, 2609 Line 1, 2609 Line 2, 2609 Line 3, SE17, 2609, SE17 2JF, GB						
Priority	TLC	Warehouse	WH1	Date Created	30-Mar-23 15:11	Date Created	30-Mar-23 08:00
TMS Ref	T30005	PO Reference	P30005				
Booking Ref	B30005	Booking Date	30-Mar-23 13:00	Cust. Order Date			
Order Reference 1	REF1-41511-1	Order Reference 2	REF2-41511-1	Order Reference 3	REF3-41511-1	Manufactured By	MANUF-ID
Order Reference 4	REF4-41511-1	Order Reference 5	REF5-41511-1	Country of Origin	GB	Loading Bay	BAY01
Weight	15929.2500	Volume	8004.2500	Charge Weight	0		
Departure Date		Arrival Date		Delivery Date	30-Mar-23 15:11	Partial Delivery	N
Qty Ordered 1	0	Qty Ordered 2	0	Qty Ordered 3	0	Qty Ordered 4	0
Qty Delivered 1	0	Qty Delivered 2	0	Qty Delivered 3	0	Qty Delivered 4	0
Delivery Details	30-Mar-23 15:11 Comment: Del Comment 1 Del Comment 2 Del Comment 3						
Comment 1	Special Instructions....						
Comment 2	Order Comments....						

Trip Information:

Events							
Info							
Route							
SO Details							
Reasons							
Map							
Notes							
Documents							
Order Information							
Trip Information							
Del. Trip ID	MAN-230330005	Del. Stop Id	2	Current ETA	30-Mar-23 10:45		
Last Update	30-Mar-23 13:00	Status	COMPLETED	Tracked	N		
Haulier	HAUL9 - OBS HAULER 9			Haulier contact	313020634		
Trailer	TRAIL503	Tractor	TRAC60	Driver	DRV009 - OBS Driver 9 [Contact: 842034138]		
Trip Ref.	TR-41511	Trip Schedule	230330	Owning Group	OBS		
Comment	Trip Comment....						

6.1.3.3 Enquiry Results Order View - Route

The Route tab will display the **current** trip/stop information stored on the system for the selected order:

Events							
Info							
Route							
SO Details							
Reasons							
Map							
Notes							
Documents							
Seq	Group Name	Location	Activity	Location Name	Location Type	Trip ID	Stop
1	OBS	2609	Load	SE17	PK	MAN-230330005	1
2	OBS	900	Unload	DN4	DL	MAN-230330005	2

Clicking on a Trip Id from this tab will take the user to the Trip / Drop view page (section 3.1.1).



6.1.3.4 Enquiry Results Order View - Item (SO) Details

The SO Details tab will display the available order details i.e. order line information for the order. Dependent on configuration and the information being supplied, there could be two levels of information - DU and/or Stock.

DU Level:

Events

Info

Route

SO Details

Reasons

Map

Notes

Documents

DU

Stock

DU Details

Line No.	Item/Asset	Description	AKA	Customer Vehicle	Work Type	Pos	Price	Batch Id	Container Type	Ordered	Packed	To Deliver	Delivered	UOM	R/C
1	CHIEP PALLET	CHIEP PALLET Desc		CUSTVEH1	A1	WORKTYPE1	10.25		PT-D-DESC	1	0	1	1	PALLET	

Stock Level:

Events	Info	Route	SO Details	Reasons	Map	Notes	Documents							
			DU	Stock										
Stock Details														
Line No.	Stock Code	Description	AKA	Customer Vehicle	Work Type	Pos	Price	Batch Id	Container Type	Ordered	To Deliver	Delivered	UOM	R/C
1	ID00001	ID00001 Desc	AKA00001	CUSTVEH1	A1	WORKTYPE1	10.25		UNIT	158	158	0	KG	View
2	ID00002	ID00002 Desc	AKA00002	CUSTVEH2	A2	WORKTYPE2	20.50		UNIT	158	158	0	CASES	View
3	ID00003	ID00003 Desc	AKA00003	CUSTVEH3	A3	WORKTYPE3	30.75		UNIT	158	158	0	CASES	View

Clicking on the Stock Code against an order line will show all of the additional order detail information held for that line:

ID00001 Details					
Description	ID00001 Desc	AKA	AKA00001	Reservation No	
Customer Line No.	1	Pallet ID		SSCC	1111122223333444455555
Status		Weight	1.0000000000	Volume	1.00000000
RPE Qty	1.00	Actual RPE Qty	1.00	Dim Weight	1.9900
Actual Weight	100.0000	Actual Volume	100.0000	Actual Dim Weight	100.0000
Date 1	30-Mar-20 00:00	Date 2	30-Mar-14 00:00	Date 3	30-Mar-17 00:00
Date 4	30-Mar-18 00:00	Date 5	30-Mar-19 00:00	Length	100.0000
Width	100.0000	Height	100.0000	Actual Length	100.0000
Actual Width	100.0000	Actual Height	100.0000	Factor	F1
Lifts	1.00	Stack	1	WPX Product ID	PROD1
Pos	A1	Location	LOC1	Price	10.25
Customer Vehicle	CUSTVEH1	Customer Trailer	TRAILER1	Authority Code	setAUTHORITYCODE1
Work Type	WORKTYPE1	Pressure	5.0	Tread Depth	2.0
Casing	CASING1	Casing Destination	CASINGDEST1	New / Remould	N
Regrooved	N	Tyre Serial No	6	Removal Reason	
Work Types	WORKTYPES1	Service Supplied	N	Barcode	BC1
Torque	1				

If reason codes exist against the order line, there will be a VIEW button against the R/C column. Clicking on the button will display the reasons associated with this line:

Item Reasons				
Item	Code	Description	Comment	Qty
ID00001	ITEM	Test Item Comment	Comment for the Item Level reason code...	158



6.1.3.5 Enquiry Results Order View - Reasons

The Reasons tab will display any reason codes held at header level against the order.

Events	Info	Route	SO Details	Reasons	Map	Notes	Documents
Date Created	Trip ID	Stop	Type	Reason	Comment		Status
30-Mar-23 13:00		DEL	ORD		Comment for the Order Level reason code...		C

Add Reason : Type Code Comment

A section underneath the list will allow the user to add an order level reason against the current order. A drop-down of types will be available which will be a list of the types currently on the system with an 'ORDER' level and a drop-down for codes which will show all codes currently on the system for the selected type. The user can optionally add a comment, and click 'Add' to add the reason to the order.

6.1.3.6 Enquiry Results Order View - Map

The Map tab will only be available to groups where the 'Mapping' parameter against the User Group is set to 'Available' and for systems where a mapping license has been purchased from Aptean.



A map of the current vehicle location will also be displayed if the system has Latitude/Longitude co-ordinates. If the order has been delivered, the truck will be shown at the delivery/collection location. If the order is currently out for delivery/collection, the truck will be shown at its last known location, and the page will also display the current ETA of the vehicle to the next drop.

Note: The Latitude/Longitude of the vehicle is updated by an ETA poller.

6.1.3.7 Enquiry Results Order View - Notes

Events	Info	Route	SO Details	Reasons	Map	Notes	Documents
Edit	ID	Created	Created By	Last Update	Updated By	Note	Delete
<input type="checkbox"/>	2	03-Apr-23 10:44	GR			Test Note 2	<input type="checkbox"/>
<input type="checkbox"/>	1	03-Apr-23 10:44	GR			Test Note 1	<input type="checkbox"/>

Characters Left: 1500

The Notes tab will allow the user to enter free-text notes against the order. It will display the date/time the note was added, the user who added the note, the note text and two buttons - Edit and Delete. Note: Users of level 2 or 3 will only be able to edit/delete their own notes, not those created by other users.

The Note section will be a fixed size, and will vertically scroll (with a fixed header) down the notes, with the latest note at the top of the list. The note text will expand so that all the text on a note will be visible i.e. no horizontal scroll.



A section at the bottom of the page will allow the entry of a new note. The text area will allow notes of up to 1500 characters per note. Clicking on an existing notes 'Edit' button will move the text into the bottom section of the page so it can be edited.

Please note: The stored text cannot be formatted e.g. bold, coloured text etc. cannot be stored.

6.1.3.8 Enquiry Results Order View - Documents

The Documents tab will allow the user to upload documents against the order being viewed and to view/download any documents already stored against this order.

Document types can be setup in the *Calidus Portal X-Ref* maintenance page:

NOTE: Documents will be stored against the order - it is not possible to store documents at Trip or Stop level.

6.1.3.9 Enquiry Results Order View - Vehicles

Events	Info	Route	SO Details	Reasons	Vehicles	Map	Notes	Documents
Vehicle	Make	Model	GOO	Description	Last Inspection	Config ID	Config	Service Report
VEHICLE1	MAKE1	MODEL1	1000 0	VEHICLE DESC 1	05-Jul-24 14:13	CFID1	CONFIG1	Not Available
VEHICLE2	MAKE2	MODEL2	2000 0	VEHICLE DESC 2	05-Jul-24 14:13	CFID2	CONFIG2	Not Available
VEHICLE3	MAKE3	MODEL3	3000 0	VEHICLE DESC 3	05-Jul-24 14:13	CFID3	CONFIG3	Not Available

The Vehicles tab will be displayed if the system is configured for vehicles and the order type is a service order. It will display the vehicles associated with the order, and if the order is complete and a Service Report is available, then a button will be displayed in the last column to call the Calidus EPOD system to retrieve the service report for the specific vehicle.

6.1.4 Data Exports

An Export button will be available from the following pages:

- Enquiry Results
- Enquiry Results Detail
- Enquiry Results Trip View

The export options in the drop-down will be:



- Trip ID
- Trip/Stop
- Trip/Order**
- Order
- Order Detail
- Pallet
- Trip/Order ▼

Export Level

The content of data exported will vary depending on the level of data selected, but for the selected level of data, the *Calidus Portal Page Configuration* page can be used to determine which fields are exported:

Selection								
Search By		Page	Module	TTM	Page	TTM Export Options		
Description	Section	Page Key	ID	Language Code	System Default	Show/Hide	Group Types	
Booking Date	3-Order	LOTS.enq.export_3-Order.bookingDate	bookingDate	bookingDate	Y	Show ▼	All	▼
Booking Date	3-Order	LOTS.enq.export_3-Order.originalBookDate	originalBookDate	bookingDate	Y	Hide ▼	All	▼
Booking Ref	3-Order	LOTS.enq.export_3-Order.bookingRef	bookingRef	bookingRef	Y	Show ▼	All	▼
Charge Weight	3-Order	LOTS.enq.export_3-Order.chargeWeight	chargeWeight	chargeWeight	Y	Hide ▼	All	▼

On clicking the export button, the selected information will be written into an XLS format spreadsheet and the user will be presented with an 'Open, Save' dialog box where they can open the spreadsheet or save it to disk.

NOTE: Care should be taken not to export too much information, or the process could take a considerable time to export/display the information.



7 Order Status Page

Please note: This page has been superseded by the Order Visibility Dashboard and is not actively developed. See section 3.3 for the latest Dashboard.

This page will track Order Collections & Deliveries on the system, either at Trip, Trip/Stop or Order level.

The page will initially be displayed with the system default settings:

Page 3/8 No. Rows: 223 Rows/Page: 30 **Reset** 03-Apr-2023 10:57:42

Owner	Order No.	Customer Ref	Col/Del	Planned	Current	Actual	Trip ID	Stop	Name	Time	Haulier	POD	R/C	Details
OBS	51825-026	820006	Collect	03-Apr-23 11:00	Awaiting GPS		OBS-TRP-230329025	1	ST1	ST1	HAUL4			
OBS	57734-053	831003	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-210431003	1	SA47	SA47	HAUL6			
OBS	60671-034	830034	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-230330034	1	PR1	PR1	HAUL4			
OBS	62346-052	808002	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-210708002	1	KY4	KY4	HAUL8			
OBS	64342-024	831024	Collect	03-Apr-23 12:00		03-Apr-23 11:00	OBS-TRP-230331024	1	DX16	DX16	HAUL8			
OBS	77011-030	802030	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-230402030	1	SN7	SN7	HAUL1			
OBS	79047-053	804003	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-210104003	1	B98	B98	HAUL5			
OBS	79233-037	802037	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-230402037	1	T55	T55	HAUL1			
OBS	80850-046	829046	Collect	03-Apr-23 12:00		03-Apr-23 11:00	OBS-TRP-230329046	1	KA12	KA12	HAUL1			
OBS	81073-046	831046	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-230331046	1	BD19	BD19	HAUL0			
OBS	81235-013	830013	Collect	03-Apr-23 11:00	Awaiting GPS		OBS-TRP-230330013	1	CH42	CH42	HAUL3			
OBS	82215-052	828002	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-200228002	1	CA19	CA19	HAUL6			
OBS	83435-056	829006	Collect	03-Apr-23 10:00		03-Apr-23 11:00	OBS-TRP-230329006	1	KW14	KW14	HAUL1			
OBS	83919-051	801001	Collect	03-Apr-23 11:00		03-Apr-23 11:00	OBS-TRP-181101001	1	BT35	BT35	HAUL9			
OBS	85090-022	830022	Collect	03-Apr-23 10:00		03-Apr-23 11:00	OBS-TRP-230330022	1	SG12	SG12	HAUL0			
OBS	85987-001	825001	Collect	03-Apr-23 11:00	Awaiting GPS		OBS-TRP-200125001	1	N260	N260	HAUL3			
OBS	87697-006	802006	Collect	03-Apr-23 12:00		03-Apr-23 11:00	OBS-TRP-230402006	1	TQ4	TQ4	HAUL5			
OBS	88695-002	812002	Collect	03-Apr-23 11:00	Awaiting GPS		OBS-TRP-180812002	1	FAN7	FAN7	HAUL4			
OBS	86994-001	801001	Collect	03-Apr-23 12:00		03-Apr-23 11:00	OBS-TRP-210201001	1	TF12	TF12	HAUL9			
OBS	87017-001	808001	Collect	03-Apr-23 10:00		03-Apr-23 11:00	OBS-TRP-200108001	1	PE19	PE19	HAUL1			
OBS	87706-037	829037	Deliver	03-Apr-23 14:00		03-Apr-23 11:00	OBS-TRP-230329037	2	ML5	ML5	HAUL4			
OBS	12543-007	828007	Collect	03-Apr-23 11:00	03-Apr-23 11:45		OBS-TRP-230329007	1	W67	W67	HAUL3			
OBS	18011-021	830021	Collect	03-Apr-23 11:00	03-Apr-23 11:00		OBS-TRP-230329021	1	IP01	IP01	HAUL9			
OBS	18070-021	830021	Deliver	03-Apr-23 11:00	Awaiting GPS		OBS-TRP-230330021	2	CH6	CH6	HAUL7			
OBS	19020-021	830021	Collect	03-Apr-23 11:00	03-Apr-23 11:00		OBS-TRP-230329021	1	EN1	EN1	HAUL3			
OBS	63646-009	833009	Collect	03-Apr-23 11:00	03-Apr-23 11:00		OBS-TRP-230329009	1	PM01	PM01	HAUL0			

Next Update: Auto Data Refresh: Auto **Reset** Page Switch: 5 Seconds Last Updated: 03-Apr-23 10:57:12

The settings can be changed by clicking the 'burger' menu on the top right corner of the page:

Options

View By Order

Tracking Time 4 Hrs

Delivery Window Before 15 Mins After 5 Mins

🔴 Late No Limit

🟢 Tracking Limit Delivered 15 Mins

🔴 Exceptions 1 Hr

Filters

Collect / Deliver Both

Owner All

Haulier All

Name All

Customer Ref

Status All

Reset Go Close

Options:

- **View By** - This setting determines the level of the data displayed. The options are:
- **Order** - Displays one line per Trip/Stop/Order combination with order level details - an order may appear twice on the page - once for collection, and again for delivery - the status of each line could be different e.g. the collection could show as status GREEN but the delivery could be AMBER or RED



- **Trip Id / Stop** - To display one line per Trip/Stop combination with Trip/Stop level details - if a trip has multiple stops which fit within the tracking limit, then multiple lines per trip (with different stop Id's) will be displayed.
- **Trip Id** - To display one line per Trip/Stop combination with Trip/Stop level details - if a trip has multiple stops which fit within the tracking limit, then *only* the stop with the closest planned (or current) arrival will be displayed.
- **Tracking Time** - The No. Hours of collection/delivery data to display. The default will be 4 hours though this may be changed to values of 1, 2, 4, 8 and 12 hours. There will also be a value of "Today" where all orders planned for collection or delivery on that day will be displayed. Note: Only orders where the *Calidus Portal* has a PLANNED Collection or Delivery date will be displayed - this will be either the planned collection/delivery date against the order/stop if supplied, or for deliveries only, the original booking date against the order. This may also be configured to use the actual arrival or ETA times.
- **Delivery Window** - The "RAG" indicator. This is the No. minutes before and after the PLANNED collection/delivery date/time (single or window). This will define an arrival window in which any PLANNED orders are marked as AMBER. The default values will be 15 minutes prior to the PLANNED collection/delivery and 5 minutes after the planned collection/delivery though both the Before and After values may be changed to values of 0, 5, 15, 30 and 60 minutes. At a basic level, orders will initially be GREEN and will move to AMBER after a page refresh if the PLANNED collection/delivery time is within this arrival window. If the window is exceeded without a collection/delivery, then the order will move from AMBER to RED on the next page refresh.

Examples (assuming order is not delivered)

Single collection/delivery date (default)

Delivery Window Before : 15 Minutes After: 5 Minutes Planned Delivery Time: 11:00AM

Before 10:45 the status will be GREEN

Between 10:45 and 11:05 the status will be AMBER

After 11:05 the status will be RED

Collection/delivery window

Delivery Window Before : 30 Minutes After: 30 Minutes Planned Delivery Time: 10:00AM - 11:00AM

Before 09:30 the status will be GREEN

Between 09:30 and 11:30 the status will be AMBER

After 11:30 the status will be RED

See the Setting of RAG Status section for more details.

Note: The status will only change on the next page refresh.

- **Tracking Limit (Late)** - The number of minutes past the *planned* collection/delivery time that a 'late' collection or delivery order will remain on the board. As well as several options for the number of minutes, a "0" value will also be available, which means that late orders will be removed from the board on the next page refresh.
- **Tracking Limit (Delivered)** - The number of minutes past the *actual* collection/delivery time that a 'clean' fully collected or delivered order (i.e. GREEN with a tick) will remain on the board after it has been collected/delivered. As well as several options for the number of minutes, a "0" value will also be available, which means that collected/delivered orders (which are not RED) will be removed from the board on the next page refresh.

Example

Tracking Limit Green : 5 Minutes Actual Delivery Time: 10:30AM Delivered: Clean

On the next refresh after 10:30 the status will change from GREEN to GREEN with a tick.

The order will remain on the board

On the next refresh after 10:35 the order will be removed from the board

Tracking Limit Green : 0 Minutes Actual Delivery Time: 10:30AM Delivered: Clean

On the next refresh after 10:30 the order will be removed from the board.



- **Tracking Limit (Exceptions)** - The number of minutes past the collection/delivery time that an order with 'exceptions' (i.e. RED with a tick) will remain on the board after it has been collected/delivered. As well as several options for the number of minutes, a "0" value will also be available, which means that collected/delivered orders which are RED with a tick will be removed from the board on the next page refresh.

Filters:

- **Collect/Deliver** - This will determine when only collections or deliveries are displayed on the page. The default will be both.
- **Owner** - This will be a list of owners visible to the user of the page. If the user has no restrictions, then the list will contain all owners on the system. An "All" option will also be available (as a default) which will take into account the users restrictions.
- **Haulier** - This will be a list of carriers/hauliers visible to the user of the page. If the user has no restrictions, then the list will contain all Hauliers stored on the "Trip" file on the system. An "Any" option will also be available (as a default) which will take into account the users restrictions.

The Owner and Haulier drop-downs above will allow the selection of multiple values within the drop-down, e.g. when selecting an owner, the user can take the default of all owners, a single owner or multiple owners.

- **Customer Ref** - This will allow the user to enter a partial (or full) customer reference to filter the data by. For example, entering "LIV" will only find orders where the reference is exactly "LIV". Wildcard entry will also be available, so entering "LIV%" will retrieve all orders with a customer reference beginning with "LIV". Entering "%LIV%" will retrieve all orders where "LIV" is anywhere within the customer reference. Note: This search will not be case sensitive.
- **Status** - This setting can be used to show only RED, AMBER or GREEN orders, or any combination. The default will be the display of all status.

Note: System configuration can be used to hide any or all of the above filtering fields. If a filter is hidden, then a value of "All/Any" will be assumed.

Once the user has chosen their settings/filters, they should click the 'Go' button to begin the retrieval/display of orders.

The page will display the current page number and total pages, the current date/time and also the date/time the data was last updated i.e. retrieved from the server.

The number of records shown on a single page will be determined by the resolution of the users screen. This will be a calculated value within the page. If the number of records retrieved is greater than what can be displayed on a single page, then the data will be displayed over multiple pages and the system will scroll through these pages in turn. See later for the settings to control this.

The page data will display the following information (dependent on the View By level selected):

- **RAG Status** - see section "Setting of RAG Status" below. If an order is RED then the whole line of text will appear in red text.
- **Owner** - the owner of the order
- **Order No** - the system order number
- **Customer Ref** - the customer's order reference
- **Col/Del** - A column to denote whether the line detail is for the collection or delivery of the order.
- **Planned** - the planned collection or delivery date/time. If a window is being used, then this will be the planned collection or delivery date/time window.
- **Current** - the current arrival date/time at the stop where the order is being collected or delivered. This will only be displayed if the tracking information is available, and the order has not been collected or delivered (dependent on the line is 'Col' or 'Del'). If the ETA time is older than 5 minutes (if it has not been updated from the poller process which updates ETA's) then it will not be displayed.
- **Actual** - the actual collection or delivery time recorded on the system (when supplied). If an order was cancelled, for the delivery ('Del') this will be the time of the cancellation.
- **Trip Id** - the trip ID for the collection or delivery
- **Stop** - the stop Id for the collection or delivery
- **Name** - the Name entered on the collection/delivery address
- **Town** - the Town entered on the collection/delivery address
- **State** - the State/County entered on the collection/delivery address
- **Haulier** - the name of the haulier assigned to the Trip (or order if not on a trip)
- **Driver** - the name of the driver assigned to the Trip (or blank if not on a trip). Hovering over the driver will display the contact information (if supplied)



- **POD** - Clicking on the POD icon will open a new tab (or window) displaying the POD for the order, if available. The POD icon will only appear if a POD is configured and the order is delivered.
- **R/C** - An icon will appear against any orders which have an ORDER level reason code associated with it. Clicking the icon will display a popup with the ORDER level reason codes associated with the order.
- **Details (Camera Icon)** - Clicking the icon will display a popup with the order line details:

OBS / 39979-013						
Line No.	Stock Code	Description	Ordered	To Deliver	Delivered	UOM
1	ID00001	ID00001 Desc	130	130		CASES
0002	CHEP PALLET	CHEP PALLET Desc	1	1		PALLET

- **Details (Truck Icon)** - Clicking the icon will display a popup with the route details:

OBS-TRP-230329023						
Stop	Type	Address	Owner	Order No	Planned	Actual
1	PK	NG18 1983 Line 1 NG18 NG18 4PU	OBS	57487-023	03-Apr-23 10:00	03-Apr-23 09:00
2	DL	OX14 2181 Line 1 OX14 OX14 2NT	OBS	57487-023	03-Apr-23 15:00	03-Apr-23 15:00

Hovering over an order number will display the standard 'hover' text with further details for the order.




Clicking on an order number will take the user to the Enquiry Results Detail page.

Clicking on a Trip Id will take the user to the Trip/Stop view details page.

Clicking on any of the main headings will sort by that column.

7.1 Data refresh and display

At the top of the page will be a control box to allow the user to manually change the page (best achieved if the data is paused - see below) and a Rows/Page setting to alter the number of rows displayed on the page, if the automatic detection based on screen resolution is insufficient:

Page 6/8   No. Rows: 237 Rows/Page: 30 

At the base of the page will be a control box to allow the user to specify the rate of data refresh and the rate at which multiple pages display:

Next Update: Auto   Page Switch: 5 Seconds 

- **Data Refresh** - The time in minutes between data refreshes. Values will be Auto, 2, 5, and 10 minutes. Default is Auto, which means that whenever the last page of data is reached, the system will refresh and start again. If only one page of data is displayed in Auto mode, then it will refresh every 2 minutes.
- **Pause** - a Pause button to stop both the data and page refresh, so that the data currently displayed on the page will remain until the user presses this button again (Note: when pressed, the text of the button will be changed to 'Resume' - clicking resume will force a full data refresh and display, resetting the view back to the first page).
- **Page Switch** - The time in seconds between switching page data. Values will be 15, 30, 60, 120 and 180 seconds. Default is 30 seconds.

Examples

Data Refresh: Auto Page Switch: 30 Seconds No. Records: 250 orders Records Per Page: 25

The page will initially display the 25 records with the nearest PLANNED delivery time to the current time. After 30 seconds, the next 25 records will be displayed - this will continue with a new page every 30 seconds until the last page (there will be 10 pages of data in this example and given these settings the last page will take 5 minutes to display) upon which the data will be refreshed, and again the 25 records with the nearest PLANNED delivery time to the 'new' current



time will be displayed.

Data Refresh: 10 Minutes Page Switch: 30 Seconds No. Records: 250 orders Records Per Page: 25

The page will initially display the 25 records with the nearest PLANNED delivery time to the current time. After 30 seconds, the next 25 records will be displayed - this will continue with a new page every 30 seconds until the last page (as previous example, there will be 10 pages of data in this example). The same (non-updated) data will repeat, until the Data refresh time is exceeded (10 minutes) at which point the data will be refreshed, and again the 25 records with the nearest PLANNED delivery time to the 'new' current time will be displayed.

Data Refresh: 5 Minutes Page Switch: 60 Seconds No. Records: 250 orders Records Per Page: 25

The page will initially display the 25 records with the nearest PLANNED delivery time to the current time. After 60 seconds, the next 25 records will be displayed - this will continue with a new page every 60 seconds until Data refresh time is exceeded (5 minutes) at which point the data will be refreshed, and again the 25 records with the nearest PLANNED delivery time to the 'new' current time will be displayed. **Note:** *With these settings, the page will never get to the oldest records retrieved, as the data refresh is less than the time it takes to page through all of the records - it will be the responsibility of the site/user to 'tweak' the Data and Page refresh settings (as well as the tracking time and tolerances) to ensure that it is displaying the data as they require.*

7.1.1 Setting of RAG Status

Note: This section is highly configurable, and given the possible combinations, the exact details of what determines the RAG status can be difficult to document. The description below assumes a default configuration.

The following factors will determine what is displayed in the RAG status column:

- Collection/Delivery Window
- Actual Collection/Delivery Time, Current ETA and Current Time
- Order Status

7.1.2 Calculation of the "Window"

The Collection/Delivery Window (from this point referred to as the "Window" meaning a collection or delivery as appropriate) is dependent on the setting of the "Planned Window" parameter:

- "None" - If the Arr/Dep system parameter (set against the TTM Config item TRACK_CFG - Arr/Dep) is "A" (default) then the planned arrival time at the stop will be used, otherwise if set to "D" the stop planned departure will be used. In both of these situations, a window will not *initially* be set.

If the parameter is set to "B" then both the stop planned arrival and departure will be used.

If the TRACK_CFG Arr/Dep is set to "A" or "D" then if either of the "Delivery Window" parameters are set to a non-zero value then a window will be calculated using either the stop planned arrival/departure date (as configured) +/- the delivery window settings. If the "Delivery Window" parameters are both set to zero, then the window will be set with the same start/end window times.

If the value is "B", then both the arrival and departure times for the stop will be used for the window.

Examples:

TRACK_CFG: "D" Stop Planned Arrival: 10:00 Stop Planned Departure: 11:00 Delivery Window From 15Min To 30Min

The Window will be set from 10:45 to 11:30

TRACK_CFG: "A" Stop Planned Arrival: 10:00 Stop Planned Departure: 11:00 Delivery Window From 15Min To 30Min

The Window will be set from 09:45 to 10:30

TRACK_CFG: "D" Stop Planned Arrival: 10:00 Stop Planned Departure: 11:00 Delivery Window Not Set i.e. "0"



A window will not be used - the planned time will be displayed as 11:00 only, with no window.

TRACK_CFG: "B" Stop Planned Arrival: 10:00 Stop Planned Departure: 11:00 Delivery Window From 15Min To 30Min

The Window will be set from 09:45 to 11:30

TRACK_CFG: "B" Stop Planned Arrival: 10:00 Stop Planned Departure: 11:00 Delivery Window Not Set i.e. "0"

The Window will be set from 10:00 to 11:00

- "System" - The planned system window from the order will be used. If this is not available for an order, then the stop times will be used i.e. the page will operate as per "None" above.

Examples:

System Planned Arrival: 10:00 System Planned Departure: 11:00 Delivery Window From 15Min To 30Min

The Window will be set from 09:45 to 11:30

System Planned Arrival: 10:00 System Planned Departure: 11:00 Delivery Window Not Set i.e. "0"

The Window will be set from 10:00 to 11:00

- "Customer" - The planned customer window from the order will be used. If this is not available, then the system order planned times will be used i.e. the page will operate as per "System" above.

Examples:

Customer Planned Arrival: 10:00 Customer Planned Departure: 11:00 Delivery Window From 15Min To 30Min

The Window will be set from 09:45 to 11:30

Customer Planned Window: Not set

System Planned Arrival: 11:00 System Planned Departure: 12:00 Delivery Window From 15Min To 30Min

The Window will be set from 10:45 to 12:30

7.1.3 Calculation of the "Time"

The "Actual" or "Planned" time (from this point referred to as the "Time" meaning either an actual or current (ETA) time as appropriate) will be determined by the status of the stop/order and the value of the Use Current system parameter (set against the TTM Config item TRACK_CFG - Use Current).

At Trip or Trip/Stop Level

For stops which have an actual collection/delivery time against stop, then the Time will be set to the actual collection or delivery time against the stop as appropriate.

For stops which have not yet been collected/delivered, if the "Use Current" parameter is set to "Y" then the Time will be set to the Current/ETA time of the stop, if available, otherwise the system time will be used.

At Order Level

For orders which have an actual collection/delivery time against the *final* collection/delivery point, then the Time will be set to the actual collection or delivery time against the order as appropriate.

For orders which have not yet been collected/delivered at the *final* collection/delivery point, if the "Use Current" parameter is set to "Y" then the Time will be set to the Current/ETA time of the STOP, if available, otherwise the system time will be used.

Note: If the Current/ETA time is older than 5 minutes past the system time, then the system time will be used.



7.1.4 Calculation of RAG Status

A line will be RED when it has not yet been collected or delivered and the Time exceeds the upper value of the Window. These lines will remain on the board until collected/delivered or cancelled.

A line will be RED with a tick if the order has been cancelled, or it has been collected/delivered and the actual Time is *after* the upper value of the Window, or (for the deliveries only when viewing by order, and via configuration) the order has been delivered and a) any of the order lines are short or b) any of the order lines have a reason code assigned to them. These lines will remain on the board from their collection/delivery/cancellation Time until the next data refresh exceeding the Tracking Limit (RED).

A line will be AMBER if it has not been collected/delivered and the Time is within the bounds of the Window.

A line will be GREEN with a tick if the order has been fully collected/delivered *before* the upper value of the Window where (if viewing at Order level) no order lines having a reason code assigned to them. These orders will remain on the board from their collection/delivery Time until the next data refresh exceeding the Tracking Limit (GREEN).

If none of the above conditions are met then the order line status will be GREEN. This will apply to all un-collected or un-delivered orders where the Time is not yet within or exceeding the Window.



8 Visibility

On initial entry into the page, the user can choose between the dashboard (by clicking the Apply Button in the Visibility Settings, or can search for specific data by clicking the Search icon in the lower left of the page.

8.1 Customer Visibility Settings

The visibility settings will initially be presented to the user:

Note: The initial values for the above parameters will be taken from the maintenance settings against the owner, if only a single owner is available to the user or a single owner is in the current Order List, else from the default settings against the page. Changes to these parameters will be kept for the users session, but will be restored back to the defaults on each login (or change of owner status).

- Owner - If 'Owner' is selected from the 'Apply' then the values set against the selected owner will be used.
- Customer Group - If available, will allow the user to select the Customer Group.
- Delivery Window Before/After - Defines the RAG status of *undelivered* orders. The two values (before and after) define the range for the Amber orders. For example, setting the values to 15 mins and 30 mins as above, means that until the **planned** arrival date of an order is within 15 minutes - the "before" setting - of the current time, it will be shown as RAG status green. Once it is within 15 minutes of its planned arrival, on the next data refresh, it will be changed to RAG status amber. Once the planned time is exceeded by more than 30 minutes - the "after" setting - and the order remains undelivered, then the RAG status will be red.
- Keep Delayed For - this will determine how long planned, but undelivered orders will remain on the page after the planned delivery time has elapsed. Setting the value to "Today" will keep undelivered orders on the page for the whole day.
- Show ? : - The values in these dropdowns determine the visibility of the relevant order status to the drop-down e.g. Part-Delivered will allow the user to determine how long part-delivered orders will remain on the page after the *actual* delivery time. Setting the value to "Today" will keep undelivered orders on the page for the whole day. Setting the value to "None" will remove the orders immediately on the next page refresh.
- Apply Details
 - ♦ Current - Will use the values as set above.
 - ♦ System - Will use the values set against the system.
 - ♦ Owner - Will use the values set against the selected owner in the drop-down, or the system values if no owner is selected.



Note: Selecting System or Owner will ignore any values manually set.

- Apply Button - Will refresh the order list based on the selected 'Apply' Details settings and the current filters.

8.1.1 Customer Visibility Search

The Search Icon will open a Search Panel to allow the user to find specific data.

- Owner - A drop-down list of owners available to the user. Defaults to 'All'.
- Order Number - Entering an order number (or partial order number) or list of orders will display the Order List if multiple orders are retrieved, or will take the user to the Order/Route details page if a single order is retrieved. To enter an order number, an owner must be selected. Note: A list of orders may be entered by separating the orders with a comma - in this case, partial matching will not be made, and an exact match will be retrieved for all of the orders in the comma separated list. For example, entering "MON" will find any order which contains the letters "MON". Entering "123,124,125" will find only orders "123", "124" and "125".
- Booking Ref. - as above, but filtering on the Customer's booking reference. To enter a booking reference, an owner must be selected.
- From Location - filters by From Location (no partial retrieval).
- Delivery Point - filters by Delivery Point (no partial retrieval).
- Customer - filters by the specific Customer (no partial retrieval) or list of customers.
- Customer Group - a drop-down list of defined customer groups, defaulting to All/Any. To enter a customer group, an owner must first be selected. Note: This will only be available if customer groups are configured for the user.
- Route ID - as with order number, but filtering on the Route ID.
- Haulier - filters the Order List by the specific haulier (no partial retrieval) or list of hauliers.
- Vehicle - filters by Vehicle ID. Only available if system is configured for Vehicles.
- Delivery Date - Will have a drop-down list with the following values:
 - ◆ Yesterday
 - ◆ Today (default)
 - ◆ This Week - defined by the start/end day maintained parameters
 - ◆ This Month - based on the calendar month
 - ◆ Last 10 Days
 - ◆ Last 30 Days
 - ◆ Custom - this will then display a date range to allow the entry of a custom date range (though this will be limited to a maximum range of 31 days)
- Export - Can be used to export the data in addition to displaying the data on the page.

Note: All searches will be limited within the users Restrictions i.e. the orders they can view will be limited within the restrictions set against the users group first, then within any of the filters applied.



Clicking on the Find button will execute the search. If only a route code was entered, then the user will be taken to the route page, otherwise the search will return the filtered Order List, or take the user into the Order/Route details page if a single order is retrieved.

Clicking on the Clear button will remove all of the current filters and re-run the Order List based on the defaults.

8.1.2 Customer Visibility Main Page

03-Apr-2023 11:22:07														
Order Count	162													
Outstanding	135	86.5%												
Arrived	0	0.0%												
Delivered (Clean)	2	1.3%												
Part Delivered	2	1.3%												
Failed Delivery	3	1.9%												
Cancelled	0	0.0%												
Re-Booked	0	0.0%												
Late	17	10.5%												

Order Reference	Cal/Del	Time Status	Delivery Time	Qty Status	Owner	POD	Deliver To	Booking Ref	Warehouse	ABO	TLC	Case	CR's	Route	Pin	Header
25034-002	Del	Early		Outstanding	CBS		92	807902	03 0700 - 03 0800	TLC	394	1		DES-TRP-18007002		HAUL7
33657-002	Del	Early		Outstanding	CBS		CV51	826802	03 0700 - 03 0800	TLC	397	1		DES-TRP-11102002		HAUL9
26034-002	Del	Late		Outstanding	CBS		X08	820302	03 0800 - 03 0900	TLC	957	1		DES-TRP-21082002		HAUL4
63134-003	Del	On-Time		Outstanding	CBS		W03	800340	03 0800 - 03 0900	TLC	795	1		DES-TRP-210402043		HAUL8
88377-015	Del	On-Time		Outstanding	CBS		753	836015	03 0900 - 03 1200	TLC	290	1		DES-TRP-23030015		HAUL8
44964-029	Del	Late		Outstanding	CBS		LL16	831029	03 0900 - 03 1000	TLC	19	1		DES-TRP-23031029		HAUL9
18542-002	Del			Outstanding	CBS		375	816802	03 1000 - 03 1200	TLC	708	1				
44035-034	Del	On-Time	10:00	Failed Delivery	CBS		N09	831034	03 1000 - 03 1200	TLC	0	1		DES-TRP-23031034		HAUL0
87424-010	Del	On-Time		Outstanding	CBS		818	830810	03 1000 - 03 1300	TLC	803	1		DES-TRP-23030010		HAUL1
39825-002	Del			Outstanding	CBS		8748	820302	03 1000 - 03 1300	TLC	235	1				
94875-044	Del			Outstanding	CBS		8718	820944	03 1100 - 03 1300	TLC	36	1				
23059-002	Del	Early	08:00	Part Delivered	CBS		049	820502	03 1000 - 03 1300	TLC	89	1		DES-TRP-200725002		HAUL9
39952-014	Del	Late	11:30 ETA	Outstanding	CBS		L320	820614	03 1000 - 03 1200	TLC	748	1		DES-TRP-23032014		HAUL9
18370-031	Del	Early		Outstanding	CBS		DH8	830631	03 0800 - 03 1100	TLC	268	1		DES-TRP-23030031		HAUL7
39962-005	Del	Early		Outstanding	CBS		743	811885	03 1000 - 03 1200	TLC	985	1		DES-TRP-181118005		HAUL4
19869-002	Del	Early		Outstanding	CBS		LL13	948802	03 1000 - 03 1300	TLC	624	1		DES-TRP-21080802		HAUL0
76362-001	Del	Early		Outstanding	CBS		A041	820801	03 0900 - 03 1200	TLC	953	1		DES-TRP-170625001		HAUL8
84987-017	Del			Outstanding	CBS		078	831817	03 1100 - 03 1300	TLC	607	1				
94871-002	Del	On-Time	12:00 ETA	Outstanding	CBS		N664	816803	03 1200 - 03 1400	TLC	426	1		DES-TRP-181118003		HAUL3
49437-001	Del			Outstanding	CBS		6413	802001	03 1000 - 03 1200	TLC	185	1				
22189-040	Del	Early		Outstanding	CBS		7011	830390	03 1000 - 03 1300	TLC	276	1		DES-TRP-23030040		HAUL7
21520-002	Del	On-Time	12:00 ETA	Outstanding	CBS		PC1	800803	03 1200 - 03 1400	TLC	665	1		DES-TRP-181208003		HAUL4
24247-027	Del	Early	11:00	Delivered	CBS		BH4	802027	03 1200 - 03 1300	TLC	474	1		DES-TRP-220402027		HAUL2
71702-002	Del	Early	10:00	Delivered	CBS		SK14	802002	03 1200 - 03 1400	TLC	887	1		DES-TRP-230402002		HAUL3
43883-012	Del			Outstanding	CBS		0711	802012	03 1100 - 03 1200	TLC	296	1				
85521-003	Del	Early		Outstanding	CBS		5421	810003	03 1000 - 03 1300	TLC	395	1		DES-TRP-200310003		HAUL7
52078-009	Del	Late	12:30 ETA	Outstanding	CBS		L348	805009	03 1200 - 03 1400	TLC	360	1		DES-TRP-230402009		HAUL2
87495-010	Del	On-Time	12:00 ETA	Outstanding	CBS		PJ30	829010	03 1200 - 03 1400	TLC	122	1		DES-TRP-230320010		HAUL7
88321-021	Del			Outstanding	CBS		8523	800321	03 1100 - 03 1200	TLC	362	1				
69571-034	Del	Early		Outstanding	CBS		4855	830834	03 1200 - 03 1500	TLC	62	1		DES-TRP-23030034		HAUL4

Side Panel

The Side Panel Order Summary displays a count - and where applicable a percentage - of the currently order selection (the 'Order List') broken down into various status:

- Order Count - A count of the number of orders displayed in the Order List.

Note: Clicking on this line will reset any of the filters from the below lines.

- RAG Order Status - this section will have colour coded lines for Outstanding, Arrived, Delivered (Clean), Part Delivered i.e. quantity exception, Failed i.e. 0 quantity delivered and Cancelled with the total number of orders for that type and the percentage against the total number of orders. Clicking any of the sections will filter the Order List for the selected status.
- Re-Booked/Late - this section will display the number and percentage of orders defined as Re-Booked and Late. Clicking on either line will filter the Order List.
- CRM (If enabled):

CRM Orders	0	
CRM Internal	0	
CRM Customer	0	

- CRM Orders - this will filter the selection to orders with CRM's (of any status).
- CRM Customer - this will filter the selection to orders where the order has an open

CRM where the 'Action With' is the CUSTOMER.

- CRM <Client> - this will filter the selection to orders where the order has an open

CRM where the 'Action With' is the <Client>.

No percentage values will be calculated for the CRM columns. If an order has multiple CRM's it is possible an order can appear in both the Customer and <Client> filters.

The Side Panel may be hidden / displayed by clicking on "Show/Hide Slide Panel" at the base of the page.

Order Summary



The order list displays details of the selected orders, allowing the user to click on certain fields for more details, and then to click to drill down to the detail pages. A typical display of fields is as follows:

Order Reference	Col/Del	Time Status	Delivery Time	Qty Status	Owner	POD	Deliver To	Booking Ref	Window	RBO	TLC	Cases	DU's	Route	Pin	Haulier
-----------------	---------	-------------	---------------	------------	-------	-----	------------	-------------	--------	-----	-----	-------	------	-------	-----	---------

But the fields available may vary per system.

The user can click on any of the headings to sort (ascending/descending) on that column (Tip: You can also hold the shift key and click multiple columns to sort on the first then subsequent columns)

Most of the fields have a 'filter' available - either a drop-down list of the values within the Order List data or a free text box which allows partial / pattern matching searches for the current Order List data.


The order list shows the following fields:

- Order Ref - The system(s) order reference. Clicking on the order number will display further information on the order:

Order No: 34347-027	
Owner	OBS
Order No	34347-027
Latest Status	Delivered
TLC	N
Trip/Stop	OBS-TRP-230402027 2
Deliver To	237, BH6, 237 Line 1, 237 Line 2, BH6, 0237, BH6 5BG, GB ##
Comment	Special Instructions....
Haulier	OBS HAULIER 2
TMS Ref	T02027
Booking Ref	B02027
PO Reference	P02027
Latest Booking	03-Apr-23 12:00
Departure Date	03-Apr-23 10:30
Arrival Date	
Delivery	03-Apr-23 08:32
Driver Name	OBS Driver 2
Vehicle	TRAC32

Details

Clicking on 'Details' will take the user into the detail pages.

- Col/Del - Whether the order line is for a collection or delivery
- Time Status - Either Early, On-Time or Late. The definition of what is Early, On-Time or Late is calculated based on the parameters in the Side Panel settings, and will be based on the current time (or ETA if configured) versus the Planned or Actual arrival (+/- window) date (depending on whether the order is outstanding or delivered) at the *final* delivery point, i.e. the trip/stop information supplied for delivery of the order. Late orders will be flagged Red, Early orders Green and On-Time orders will be flagged Blue.
- Delivery Time - The Actual delivery time if the order is delivered, else the ETA time if the order is outstanding and an ETA is available (the time will be suffixed with 'ETA') else the Planned delivery time.
- Qty Status - Outstanding (Blue), Arrived (Purple), Delivered (Green), Part-Delivered (Amber), Failed Delivery (Red) or Cancelled (Grey). The definition of the quantity status will be based on the side panel settings and the status of the order along with the planned vs actual delivered quantities.
- Owner - the owner of the order. This column will only be displayed if there are multiple owners within the Order List.
- POD - Will display a document  icon to indicate a POD is available to view from the system. Clicking on the icon will open the POD document in a new tab.
- Deliver To - The ID and town of the delivery address. Clicking on the address will display further details of the address. Note: As space on the screen is limited, this field will be truncated at 30 characters.
- Booking Ref - The customers booking reference
- RBO - the number of re-books against the order.
- TLC - An indicator against the order to highlight important customers orders.
- Cases - The total quantity of cases ordered on the order (for detail type 'S' lines)
- DU - The total quantity of DU's ordered on the order (for detail type 'D' lines)
- Route - The Delivery route Id i.e. to the final delivery point. Clicking on the route will display further details:



Trip ID: OBS-TRP-230402024	
Collection Address	2935 Line 1,2935 Line 2,TA2,2935,TA2 7PL,GB ##
Delivery Address	2166 Line 1,2166 Line 2,OL4,2166,OL4 5TW,GB ##
Driver Contact	121897191
Tractor	TRAC37
Trailer	TRAIL356

Details

Clicking on 'Details' will take the user to the Route Detail page.

- Pos. - Will display a truck icon to indicate that a map is available with the delivery vehicles last known position. Clicking on the icon will open a view of the map.
- Haulier - the Haulier's name for the haulier of the delivery route. As space on the screen is limited, this field will be truncated at 18 characters.

If CRM functionality is enabled:

- CSRC - will display the Customer Services reason code if one has been assigned to the order.
- CRM - will display if an order has any CRM's associated with it. The figures displayed in the column will vary depending on the CRM status of the order:
 - ◆ If no CRM's exist for the order, the column will be blank
 - ◆ If CRM's exist, but are all resolved, only the total number of CRM's for the order will be displayed
 - ◆ If CRM's exist, and the Action is with the relevant user i.e. CLIENT or CUSTOMER the column will display the number of OPEN CRM's where the 'Action With' is against the current user followed by the TOTAL number of CRM's against the order i.e. all open and resolved. For example, if an order had 2 CRM's - one open with the Client and one closed, a Client user would see "1 of 2" whilst a Customer would see "2".

8.1.3 Detail Sections

Clicking on the details button for an order in the Order Summary page will take the user into a page with details for the order, and a series of tab pages with additional order information.

Left Side Details

On the left hand side of the page for the Order, Order Details and Route pages the following will be displayed:



① **Order Reference:** 32196-008

Delivery Status:
● On-Time
Quantity Status:
● Delivered

Original Del: 03-Apr-23 12:00
Latest Booking 03-Apr-23 12:00
Booking Ref: B29008

Order Details:	Qty	DU's
Planned	116	1
Despatched	116	1
Delivered	116	1

Collect From:
320

Deliver To:
 2129
 2129 Line 1
 2129 Line 2
 NW11
 NW11 6EJ

- Order Reference - The selected order number
- Delivery Status - A RAG indicator which will be:
 - Blue On Time
 - Green Delivered Early
 - Red Delivered Late or Running Late.
- Quantity Status - A RAG indicator which will be:
 - ♦ Blue Outstanding (i.e. not delivered)
 - ♦ Purple Arrived (but not yet delivered)
 - ♦ Green Delivered where the delivered qty matches the ordered or despatched (configurable)
 - ♦ Yellow Part Delivered where the delivered qty does not match the ordered or despatched

(configurable) but is greater than 0

- Red Failed Delivery where the delivered qty is 0 or the order was 'Claused' (configurable)
- Grey Cancelled
- Original Del - The first delivery date of the order
- Latest Booking - The latest Booking date received by the system. Clicking on this field will display a list of previous bookings (latest first).
- Booking Ref - The booking reference for the order
- Order Details - A table of the following:
 - ♦ Planned - The total Quantity (detail type 'S') and DU Qty (detail type 'D') planned on the order
 - ♦ Despatched - The total Quantity and DU Qty despatched on the order
 - ♦ Delivered - The total Case Quantity and DU Qty delivered on the order
- Collect From - The name of the location where the order is collected
- Deliver To - The address of the location where the order is delivered (final delivery location) and telephone number (if supplied).
- Back to List - Will take the user back to the home page with the last retrieved order list.



- Refresh - Will refresh the current order details page and re-display the details.

8.1.4 Order Summary



The top section will contain a summary of the route (trips) for the order:

- Activity:
 - ◆ Collect - for the collection of the order from the collection location
 - ◆ Deliver - for the delivery of the order at it's final delivery location
- Location - the name of the location for the collection/delivery. Clicking on this will display further location details as per the main page.
- Route - the Trip Id. Clicking on this will take the user to the Route Details page.
- Stop - the sequence of the drop on the trip
- Haulier - the name of the haulier for the trip. Clicking on this will display further location details as per the main page.
- Driver - the name of the driver for the trip
- Planned/Actual - the Planned/Actual time of arrival for the trip/stop
- Status - A RAG indicator which will be:
 - Blue On Time
 - Green Delivered Early
 - Red Delivered Late or Running Late.

Note: This is the **STOP** status, which is different from the order status. The time status for the order uses the booking date of the order, and the time status for the stop uses the planned/actual arrival times, so it is possible an order could be booked for a later date than it is planned, and therefore delivered on-time as an order, even though the arrival time at the stop could be late.

Event Summary

The bottom section will contain details of the events against the order. Initially a summary of events will be displayed as per the above screenshot.

The events summary will contain the following events:

- Received - the date/time the order was received
- Departed - the date/time the order was 'out for delivery'
- Arrived - the date/time the order arrived at the final delivery point
- Delivered - the date/time the order was delivered at the final delivery point

If any of the times are not provided, then they will be left blank, and if the status has not yet been reached (delivered in the summary example above) then it will be 'greyed out'.

Clicking on the 'Show All Events' button will display a more detailed list of events:



Event Detail

1	Received	03-Apr-23 05:00
2	Marshallled	03-Apr-23 05:00
3	Departed	03-Apr-23 09:30
4	Arrived	03-Apr-23 09:00
5	Delivered	03-Apr-23 12:00
6	Scanned	03-Apr-23 12:00

If any of the events have not yet been received, then the event will still be displayed, but the date/time information will not be displayed. No other types of event will be displayed.

8.1.5 Order Detail

Details

Order
Order Detail
Route
Map

Documents
POC
POD

Show Detail

Product Detail - Issue Summary

Item Id	Item Description	DU's	Ord	Desp	Del	R/C
1	ID00001	ID00001 Desc	334	334	167	
2	ID00002	ID00002 Desc	334	334	167	
3	ID00003	ID00003 Desc	334	334	167	

No Issues

Notes

ID	Created	Level	Created By	Note	Delete
2	03-Apr-23 12:39:07		GR	Note for everyone	<input type="checkbox"/>
1	03-Apr-23 12:38:52	int	GR	Internal Note	<input type="checkbox"/>

Add Note: Level Note
Add New
Delete Selected

The top section will contain a summary of the stock for the order. The details will be sub-divided into "DU's" (line type 'D' details - which are not shown on the screenshot, but see below) and "Items" (line type 'S' details). Initially only the order lines with 'issues' will be displayed (Issue Summary) but clicking on the 'Show All Detail' button will display all of the stock lines on the order (Full Order):

Details

Order
Order Detail
Route
Map

Documents
POC
POD

Show Summary

Product Detail - Full Order

Item Id	Item Description	DU's	Ord	Desp	Del	R/C
1	CHEP PALLET	CHEP PALLET Desc	1	1	1	
1	ID00001	ID00001 Desc	334	334	167	
2	ID00002	ID00002 Desc	334	334	167	
3	ID00003	ID00003 Desc	334	334	167	

The line details will consist of:

- Sequence - the line number on the order (if supplied, or a sequential count)
- Item Id - the stock code/DU.
- Item Description - the description of the item/DU.
- Ord / Desp / Del - the quantities Ordered, Despatched and Delivered respectively.
- R/C - this will display an icon if reason codes have been supplied for the order line. Clicking on the icon will display the reasons:



Order No: 70633-008 Stock Code: ID00001			
Code	Description	Quantity	Comment
ITEM	Test Item Comment	167	Comment for the Item Level reason code...

Notes

The bottom section will allow the user to view and create simple free-text notes to associate with the order.

Notes					
ID	Created	Level	Created By	Note	Delete
2	03-Apr-23 14:22:16	GR	GR	Note 2 for everyone	<input type="checkbox"/>
1	03-Apr-23 14:21:58	Int	GR	Note 1 for internal use	<input type="checkbox"/>

The existing notes against the order will be displayed in a list with the latest note at the top:

- Id - A sequential count of the notes
- Date/Time Created - The Date/Time the note was created.
- Level - Either blank or 'INT' depending on the Level of the note. Internal notes - 'INT' - can only be created and viewed if the users group is defined as "Internal".
- Created By - The ID of the user that created the note.
- Note - The entered text/description for the note.

Add Note: Level Note

The user can create a new note (if allowed via configuration) by selecting the Level - Internal Only (default) or All Users - and entering the note text, followed by clicking on the 'Add New' button.

Each note is limited to 1500 characters.

They can also (if allowed via configuration) select an existing note and click 'Delete Selected'.

8.1.6 Route

The Route Details tab displays information about a route.

Details

Order

Order Detail

Route

Vehicles

Map

CRM

Documents

doclist

POD

POD

ID: OBS-TRP-230329038

Status: Completed

Haulier: OBS HAULER 4

Trip Ref: TR-30832

Route Code: RC-30832

Driver: OBS Driver 4

Vehicle: TRAC61

Trailer: TTRAIL852

Stop: 1

Activity: Collect

Collect From: 2308

Planned Arr: 03-Apr-23 10:00

Actual Arr: 03-Apr-23 10:00

Planned Dep: 03-Apr-23 10:00

Actual Dep: 03-Apr-23 10:30

Status:

On-Time

Quantity Status

Owner

Order

Booked

Qty Ordered

Collected

OBS

36226-038

03-Apr-23 12:00

Cases 544

DU's 1

Stop: 2

Activity: Deliver

Deliver To: 2616

Planned Arr: 03-Apr-23 12:00

Actual Arr: 03-Apr-23 12:00

Planned Dep: 03-Apr-23 13:00

Actual Dep: 03-Apr-23 12:30

Status:

On-Time

Quantity Status

Delivery Status

Owner

Order

Booked

Qty Ordered

Delivered Qty

POD

Delivered

On-Time

OBS

36226-038

03-Apr-23 12:00

Cases 544

DU's 1

Cases 544

DU's 1

N

The page displays the following header information (configurable):

ID: OBS-TRP-230329038 Status: Completed Haulier: OBS HAULER 4
 Trip Ref: TR-30832 Route Code: RC-30832
 Driver: OBS Driver 4 Vehicle: TRAC61 Trailer: TTRAIL852

- ID The Trip ID
- Status The status of the Route
- Haulier The name of the Haulier for the route
- Trip Ref The Reference for the Trip



- Route Code The Route Code
- Driver The name of the driver
- Vehicle The ID of the vehicle
- Trailer The ID of the trailer

For every stop on the route, the page will display (configurable):

Stops: 1 Activity: Collect Collect From: 2308 Planned Arr: 03-Apr-23 10:00 Actual Arr: 03-Apr-23 10:00 Planned Dep: 03-Apr-23 10:00 Actual Dep: 03-Apr-23 10:30 Status: On-Time

- Stop The ID sequence of the stop
- Activity Either Collect or Deliver dependent on the stop activity
- Collect/Deliver The name of the Location on the stop.
- Planned/Actual Arrival The planned/actual arrival date/time. If no actual exists and an ETA is available, then the ETA time will be displayed, followed by "ETA"
- Planned/Actual Departure The planned/actual departure time at the stop
- Status A RAG indicator which will be:
 - ◆ Blue On Time
 - ◆ Green Delivered Early
 - ◆ Red Delivered Late or Running Late.

Note: This is the **STOP** status, which is different from the order status. The time status for the order uses the booking date of the order, and the time status for the stop uses the planned/actual arrival times, so it is possible an order could be booked for a later date than it is planned, and therefore delivered on-time as an order, even though the arrival time at the stop could be late.

For every *delivery* order on each stop, the page will display:

Quantity Status	Delivery Status	Owner	Order	Booked	Qty Ordered		Delivered Qty		POD
					Cases	DU's	Cases	DU's	
Delivered	On-Time	OBS	45649-027	03-Apr-23 12:00	850	1	850	1	

- Quantity Status A RAG indicator which will be:
 - ◆ Blue Outstanding (i.e. not delivered)
 - ◆ Purple Arrived (but not yet delivered)
 - ◆ Green Delivered where the delivered qty matches the ordered or despatched
 - ◆ Amber Part Delivered where the delivered qty does not match the ordered or

despatched but is greater than 0

- Red Failed Delivery where the delivered qty is 0 or the order was 'Claused'
- Grey Cancelled

- Delivery Status A RAG indicator which will be:

- ◆ Blue On Time
- ◆ Green Delivered Early
- ◆ Red Delivered Late or Running Late.

- Owner The owner code
- Order The *Calidus* Portal system order number.
- Booked The Booking Date/Time
- Ordered / Delivered Qty The total quantity / DU's ordered/delivered on the order

- POD Will display a document icon to indicate a POD is available to view from

the system. Clicking on the icon will open the POD document in a new tab.

The page will also have up to 3 icons at the base of the page:

- Back To Main - Will take the user back to the Main order page with the last run search.
- Back To Order - this will only appear if the user has entered the page via the Order Details page and will take the user back to the Order Details (Route Summary) page.
- Refresh - will refresh the Route Details page



8.1.7 Vehicles

If the system is configured for Vehicles, the Vehicle Details tab displays information about the vehicles which are due to be inspected on the order:

Details						Documents		
Order	Order Detail	Route	Vehicles	Map	CRM	docList	POC	POD

Vehicle	Make	Model	ODO	Description	Last Inspection	Config ID	Config	Service Report
VEHICLE1	MAKE1	MODEL1	1000.0	VEHICLE DESC 1	29-Mar-23 08:32	CFID1	CONFIG1	Not Available
VEHICLE2	MAKE2	MODEL2	2000.0	VEHICLE DESC 2	29-Mar-23 08:32	CFID2	CONFIG2	Not Available
VEHICLE3	MAKE3	MODEL3	3000.0	VEHICLE DESC 3	29-Mar-23 08:32	CFID3	CONFIG3	Not Available

8.1.8 Map

The Map tab displays information about a route.

Details						Documents		
Order	Order Detail	Route	Vehicles	Map	CRM	docList	POC	POD

Last Update: 03-Apr-23 05:00

Zoom To Truck Reset Zoom To Delivery

A Home icon will be displayed for the order's final delivery location (or collection point if it's a collection order). If the order's vehicle has been updated with Latitude/Longitude co-ordinates the last known vehicle location will be shown as a truck icon. If the order has been delivered, only the Home icon will be shown at the delivery location. The buttons can be used to zoom into the Truck, Reset the map view, or zoom into the Delivery location.

8.1.9 CRM Details

The CRM section of the page can be used to create and maintain CRM's against the order and apply a Customer Services reason code to the order.

The first section allows the user to apply a Customer Services reason code to the order:

Details						Documents		
Order	Order Detail	Route	Vehicles	Map	CRM	docList	POC	POD

Order 48474-041 CRM

Customer Service Reason Code None

The Customer Services reason codes displayed will be those setup in the Reason Maintenance page with a type of 'CSRC'. The reason code, if set will be displayed in the Order List.

Note: The default value will be "None" i.e. blank and only one code can be associated with an order at any time. The code will update automatically when the code is selected from the drop-down i.e. there is no 'update' button.



The next section of the page allows the user to view the existing CRM's against the order:

Total: 2 Open: 1 With Internal: 1 With Customer: 0 Closed: 1									
CRM #	Status	Action With	Unread	Created	Created By	Last Update	Last Update By	CRM Issue	Closed
OBS-48474-041 #001	resolved			03-Apr-23 14:06	GR	03-Apr-23 14:10	GR	Need Customer Response	03-Apr-23 14:10
OBS-48474-041 #002	Open	Internal		03-Apr-23 14:06	GR			Internal Note	

There will be a summary line of the Total CRM's, Open CRM's, with Internal/Customer and Closed.

The table will display one line per CRM, oldest first, with the following information:

- CRM# The unique CRM number, consisting of the Order number, a dash and a 2 digit

sequence. Hovering over the CRM line will highlight the line - clicking on a line will

display all of the details for that CRM in the bottom section (see below)

- Status The status of the CRM - OPEN or RESOLVED
- Action With Whether the CRM currently needs to be actioned by <CLIENT> or the CUSTOMER.

Resolved CRM's will have no Action With.

- Unread This will contain an Envelope image if there are unread notes specific for that user

i.e. if a note was created by <CLIENT> and marked as requiring response, external

users would see the envelope but <CLIENT> users would not and vice-versa.

- Created The date/time the CRM was created
- Created By The ID of the *Calidus* Portal User who created the CRM
- Last Update The date/time of the last note against the CRM - this will only be populated after a

note is added in addition to the original CRM note.

- Last Update By The user who added the last note.
- CRM Issue The initial note entered against the CRM - if this is greater than 50 characters, the

note will be trimmed and "?" will be displayed after the note. Hovering over the note will display the full text of the note.

- Closed The date/time the CRM was closed
- Closed By The ID of the User who closed the CRM

Underneath the table, the user may Open/Create a new CRM:

Open New CRM: Action With Response Required Initial CRM Note:

- Action With Whether the CRM needs actioned by <CLIENT> or CUSTOMER (or None)
- Requires Response Whether the CRM needs a response i.e. requires the relevant user

(depending on the 'Action With') to mark the CRM/note as read.

- Initial CRM Note The description/summary of the CRM.
- Create A button to create/add the CRM.

The final section of the CRM page will display the specific details for a single (selected) CRM:

Mark All As Read

CRM Details: OBS-48474-041 #002

Close CRM

Action With Response Required Add CRM Note:

Date/Time	Entered By	Status	read By	Date read	Note
03-Apr-23 14:06	GR	Unread			Internal Note

The table will display the notes associated with the selected CRM:



- Envelope Will display against lines which require response by the user - this is similar in

functionality to the 'Unread' column in the top section i.e. it will be specific to the type of user using the page.

- Date/Time The date/time of the specific note.
- Entered By The ID of the *Calidus* Portal user who entered the specific note.
- Status The status of the note - whether Read or Unread
- Read By This will display who 'Marked as Read' the specific note. 'n/a' will be displayed if the specific note did not require a response.
- Date Read The date/time the note was read.
- Note The text of the note, formatted as per the CRM/Issue column in the top section.

Above the table, the user can enter a new note against the selected CRM:

Action With Response Required Add CRM Note:

- Action With Whether the CRM created needs to be actioned by the <CLIENT> or the CUSTOMER (or None).
- Response Required Whether the CRM needs a response i.e. requires the relevant user (depending on the 'Action With') to mark the CRM/note as read.
- Add CRM Note The additional note text to add to the CRM.
- Create A button to add a note to the selected CRM.



CRM Details: OBS-48474-041 #002



There will also be a 'Mark ALL as Read' button to mark the relevant notes i.e. those with an Envelope image to 'Read'.

Finally, there will be a 'Close CRM' button to mark the selected CRM as Closed. The user will be prompted to confirm the closure, then the selected CRM will be updated to status 'Resolved', the CRM close date/time and user will be populated and all notes within the CRM (regardless of whether they are 'relevant' to the user) will be set to 'Read'.

8.1.10 Documents

Dependent on system configuration and the type and status of order being displayed, various document tabs may be available, for example:



Document List

Upload New Document

Document Type: No file chosen

Date/Time	Type	File	Delete
03-Apr-23 02:17	Invoice documents	invoice7645734.pdf	<input type="checkbox"/> <input type="button" value="Delete"/>



The Documents tab will allow the user to upload documents against the order being viewed and to view/download any documents already stored against this order.

As detailed in section 3.1.2.8 document types can be setup in the *Calidus* Portal X-Ref maintenance page

POD/POC/Service Report

Dependent on the type and status of order, a Proof Of Collection/Delivery and/or Service Report button may be displayed. Clicking on an active button i.e. one that is not greyed out will call the relevant external system to produce and display the report.



9 GPS Tracking Enquiry

The GPS tracking enquiry is integrated into the *CALIDUS* ePOD system. GPS coordinate messages are sent back from the ePOD devices at a timed interval these messages can then be accessed to pinpoint where a driver or vehicle has been at a certain point in time

The parameters to search for the GPS messages are as follows:

9.1 Vehicle tracking

- **Track by** - Clicking '**Vehicle**' on the drop down list allows you to track via the vehicle ID
- **Vehicle** - A drop down list of vehicles ID's taken from the EPOD system

9.1.1 Driver Tracking

- **Track by** - Clicking '**Driver**' on the drop down list allows you to track via the Driver ID
- **Driver** - A drop down list of drivers taken from the EPOD system

Whether Vehicle or Driver tracking, the following selection will also be available:

- **Date/Time From** - The date and time the search criteria should start searching from
- **Date/Time To** - The date and time the search criteria should start searching to
- **Clear Dates/Times** - Clears all of the dates and times that have been entered as a search parameter
- **Find** - Starts the search based on the parameters entered

9.1.2 Search Results

Once the find button is clicked a list of results will appear matching the search criteria:

	Driver	Driver Name	Vehicle	Haulier	Haulier Name	Trip ID	Date/Time	Latitude	Longitude	
1	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 11:00	53.41188	-2.98443	Zoom
2	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 12:00	53.41192	-2.99352	Zoom
3	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 13:00	53.41287	-2.98888	Zoom
4	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 14:00	53.41441	-2.98547	Zoom
5	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 15:00	53.42519	-2.98282	Zoom
6	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 16:00	53.42924	-2.97578	Zoom
7	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 17:00	53.42985	-2.96897	Zoom
8	DR1	Driver 01 Name	TRACTOR-01	HAU01	Haulier 01 Name	TRIP-00001	03-Apr-23 18:00	53.42995	-2.96408	Zoom

A map will display with a list of the tracked points as 'dots' on the map:

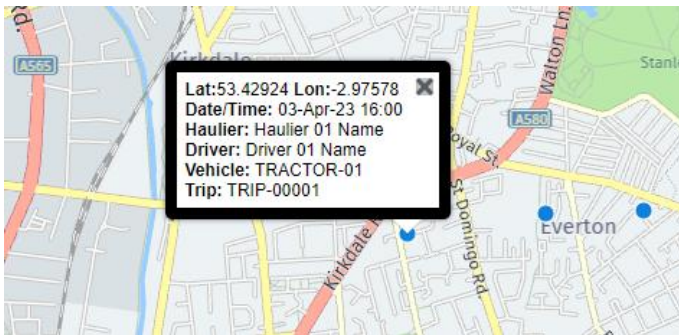




If there are multiple points within the selected zoom, the points will be grouped:



Clicking on a map point, or clicking on the Zoom button from the table list will give details for the point:



10 Exceptions

The Uploads/Exceptions page can be used to monitor the upload of XML files into the LOTS/TTM system.

Trip/Order Last Run Date 29-Mar-23 15:39 [1 Minutes]

Filters

Status Any Process Type All Event Type Filename Duration 1 Day Action Find Find

At the top of the page a display will indicate the last that the XML Poller process executed. If the poller process has not executed in the last 15 minutes (note, this is a fixed value) then the text will be red, otherwise the text will be green.

A series of filters will be available to filter the selection:

- Status - Values are 'Any', 'Success' and 'Failure' to indicate the upload status of an XML file.
- Process Type - Values are 'All', 'Trip/Order' and 'Stock'. This corresponds to the two poller processes which pick-up the XML files.
- Event Type - A text box which allows the user to find a specific file type e.g. ORD, TRP, DEL etc.
- Filename - Specific filename to search for
- Duration - Values 'Any', '1 Day' (Default), '3 Days', '7 Days' and '30 Days' to filter how far back to retrieve the data. The date corresponds to the date of upload of the file.
- Action - Has the following values:
 - ◆ Find - to retrieve the data and display on the web page (Default)
 - ◆ Export - to write the retrieved data to an XLS file
 - ◆ Purge (Keep Recent) - to mark all *except* the last 7 days records as 'closed' so as they will not appear in the exceptions page.
 - ◆ Purge - to mark ALL current records as 'closed' so as they will not appear in the exceptions page.
 - ◆ Delete - to remove all *except* the last 7 days records from the system - this option is for use as a clear-down for excessive data storage.

Clicking the Find button will display the selected files:

Status	Date/Time	Process Type	Event Type	Filename	No. Errors	
	29-Mar-23 15:39	TRIPORD	ORD	WMS_LOTS_OB5GEN_ORD_230329153905239.XML	1	
	29-Mar-23 15:39	TRIPORD	DEL	TMS_LOTS_OB5GEN_DEL_230329153905996.XML		
	29-Mar-23 15:39	TRIPORD	TRP	TMS_LOTS_OB5GEN_TRP_230329153905810.XML		
	29-Mar-23 15:39	TRIPORD	ORD	WMS_LOTS_OB5GEN_ORD_230329153905684.XML		
	29-Mar-23 15:39	TRIPORD	DEL	TMS_LOTS_OB5GEN_DEL_230329153905549.XML		
	29-Mar-23 15:39	TRIPORD	TRP	TMS_LOTS_OB5GEN_TRP_230329153905397.XML		
	29-Mar-23 15:39	TRIPORD	DEL	TMS_LOTS_OB5GEN_DEL_230329153905089.XML		
	29-Mar-23 15:39	TRIPORD	TRP	TMS_LOTS_OB5GEN_TRP_230329153904921.XML		
	29-Mar-23 15:39	TRIPORD	ORD	WMS_LOTS_OB5GEN_ORD_230329153904238.XML		

The details displayed will be:

- Status - An indicator of whether the file was uploaded successfully.
- Date/Time - The date/time the file was processed by the poller on the LOTS/TTM system.
- Process Type - Either 'STOCKINFO' or 'TRIPORD' corresponding to the poller type.
- Event Type - The event type of the XML file e.g. ORD, TRP, STK etc.
- Filename - the name of the uploaded file.
- No Errors - An indicator of the number of 'header level' errors within the file.

Clicking on the +/- button next to a file which failed to upload will display the header level error descriptions from within the file:

Status	Date/Time	Process Type	Event Type	Filename	No. Errors	
	29-Mar-23 15:39	TRIPORD	ORD	WMS_LOTS_OB5GEN_ORD_230329153905239.XML	1	
<div> <div>1</div> <div>Line 26 ORDER_TYPE: Value 'X' is not valid with respect to valid values 'O, C, R'. It must be a value from the valid values.</div> <div></div> </div>						

If further details exist, then a '?' button will be available. Clicking this will show details of the error:

29-Mar-23 15:39	TRIPORD	DEL	TMS_LOTS_OB5GEN_DEL_230329153905549.XML	
Details				
trip_id	stop_seq	Owner	so_ref	exception_data
MAN-230329003	2	OBS	71401-003	Line 26 ORDER_TYPE: Value 'X' is not valid with respect to valid values 'O, C, R'. It must be a value from the valid values.



The Exceptions page will automatically refresh at a selected period, but this will be disabled if any check box is checked, or the user clicks on the 'Stop Refresh' button.

[Refresh Data](#)

Next Page Refresh: 3 Minutes

Refresh Rate

5 ▾

[Pause Refresh](#)

NOTE: The uploads/exceptions page only shows exception details i.e. details for files which failed to upload. The page does not track which trips/orders were contained in successful uploads.



11 Stock Master Enquiry

11.1 Parameter Page

The Parameter Selection page allows the user to enter search criteria to enquire on the stock master data (i.e. as uploaded on the STK message).

The screenshot shows a web form titled "Selection". It contains the following fields:

- Owner:** A dropdown menu showing "OBS : OBS Owner".
- Warehouse:** A dropdown menu showing "WH1 : WARHEOUSE 1".
- Stock Code:** A text input field.
- Description:** A long text input field.
- AKA:** A text input field.
- Active:** A text input field.
- Country of Origin:** A text input field.
- Product Type:** A text input field.
- Default UOM:** A text input field.
- Stock Class 1:** A text input field.
- Stock Class 2:** A text input field.
- Stock Class 3:** A text input field.
- Stock Class 4:** A text input field.
- Stock Class 5:** A text input field.
- Hazardous:** A small text input field.

Below the form are two buttons: "Find" and "Reset".

The parameters visible and the labels used will depend on the system language configuration, but the complete list will be as follows:

- Owner - The owner of the stock master record. A drop-down of available owners, as determined by the restrictions set against the users group
- Warehouse - This will be set from a drop-down of available warehouses, as determined by the restrictions set against the users group
- Stock Code - This will accept a free text value up to 20 characters
- Description - This will accept a free text value up to 200 characters. Note that if a value is entered a stock master record will be selected if the long or short description matches the value entered
- AKA - This will accept a free text value up to 20 characters
- Active - This will accept a free text value up to 10 character
- Country of Origin - This will accept a free text value up to 3 characters
- Product Type - This will accept a free text value up to 15 characters
- Default UOM - This will accept a free text value up to 15 characters
- Classification 1 - This will accept a free text value up to 50 characters.
- Classification 2 - This will accept a free text value up to 50 characters.
- Classification 3 - This will accept a free text value up to 50 characters.
- Classification 4 - This will accept a free text value up to 50 characters.
- Classification 5 - This will accept a free text value up to 50 characters.
- Hazardous - This will accept a free text value up to 1 character. (Not visible on screenshot)

The warehouse and owner selection will match stock master data where the owner/warehouse matches the selected value.

For all free text fields:

- A blank value will match all stock master data.



- Matches are not case sensitive.
- Pattern matching is available using % as the meta-character.

Clicking find button will retrieve any stock master data that matches the specified parameters.

If this retrieves multiple stock master records the stock master stock selection page (see section 5.1.2) will be called to display the selected stock codes.

If this retrieves a single stock master record the stock master enquiry detail page (see section 5.1.3) will be called to display the stock master data.

If this does not retrieve any stock master records the stock master stock selection page will be called to display the 'No Data' message.

Clicking the reset button will reload the page restoring all fields to their default/blank values.

11.1.1 Stock Selection Page

This page will display a table of the stock master data that matches the specified parameters.

Warehouse	Owner	Stock Code	Short Description	Description	Active
WH1	OBS	STOCKCODE001	STOCK CODE 001	LONG DESCRIPTION FOR STOCK CODE 001	Y
WH1	OBS	STOCKCODE002	STOCK CODE 002	LONG DESCRIPTION FOR STOCK CODE 002	Y
WH1	OBS	STOCKCODE003	STOCK CODE 003	LONG DESCRIPTION FOR STOCK CODE 003	Y
WH1	OBS	STOCKCODE004	STOCK CODE 004	LONG DESCRIPTION FOR STOCK CODE 004	Y
WH1	OBS	STOCKCODE005	STOCK CODE 005	LONG DESCRIPTION FOR STOCK CODE 005	Y
WH1	OBS	STOCKCODE006	STOCK CODE 006	LONG DESCRIPTION FOR STOCK CODE 006	Y
WH1	OBS	STOCKCODE007	STOCK CODE 007	LONG DESCRIPTION FOR STOCK CODE 007	Y
WH1	OBS	STOCKCODE008	STOCK CODE 008	LONG DESCRIPTION FOR STOCK CODE 008	Y
WH1	OBS	STOCKCODE009	STOCK CODE 009	LONG DESCRIPTION FOR STOCK CODE 009	Y
WH1	OBS	STOCKCODE010	STOCK CODE 010	LONG DESCRIPTION FOR STOCK CODE 010	Y

The data will initially be shown in warehouse, owner then stock code sequence but the user can sort the data by a specific column by clicking on the column heading.

Clicking on a stock code will call the details page (see section 5.1.3) for the warehouse, owner and stock code of that row.

The page footer:



Will include an export section with an export level drop-down and an export button. Clicking on the export button will run the stock master export process for the selected level and all of the stock master data records that are displayed.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page will also include a back button which will return the user to the parameter page.

11.1.2 Detail Page

This page will display the stock master data for a single stock master record. The header section will display the main stock master information and a detail view selection.



Selection

Warehouse WH1 - WARHEOUSE 1
Owner OBS - OBS Owner
Stock Code STOCKCODE003 - STOCK CODE 003

Detail View

☒ Details
☐ UOM

This will display the warehouse (along with its associated description), the owner (and its associated name), stock code and short description of the stock master data.

The detail view will always include the details and UOM (Container Type) options and will conditionally include the image option. The image option will be included if an image file is present for this stock master record (see image details below). The contents of the detail section of the page will depend on the selected detail view option.

When the details option is selected the page will show the stock master data.

Detail View

☒ Details
 ☐ UOM

Description		LONG DESCRIPTION FOR STOCK CODE 003	
AKA	SC003	Country of Origin	UK
Product Type	STANDARD	Hazardous	N
Creation Date	29-Mar-23 15:47	Initial Status	AVAILABLE
Stock Extra Field 1	EXTRA 1 ON STOCK MASTER FOR STOCKCODE003	Stock Extra Field 2	EXTRA 2 ON STOCK MASTER FOR STOCKCODE003
Stock Extra Field 4	EXTRA 4 ON STOCK MASTER FOR STOCKCODE003	Stock Extra Field 5	EXTRA 5 ON STOCK MASTER FOR STOCKCODE003
Stock Extra Field 7	EXTRA 7 ON STOCK MASTER FOR STOCKCODE003	Stock Extra Field 8	EXTRA 8 ON STOCK MASTER FOR STOCKCODE003
Stock Class 1	CLASSIFICATION 1 VALUE	stock FIFO 1	RFO CONTROL 1 VALUE
Stock Class 2	CLASSIFICATION 2 VALUE	stock FIFO 2	RFO CONTROL 2 VALUE
Stock Class 3	CLASSIFICATION 3 VALUE	stock FIFO 3	RFO CONTROL 3 VALUE
Stock Class 4	CLASSIFICATION 4 VALUE	stock FIFO 4	RFO CONTROL 4 VALUE
Stock Class 5	CLASSIFICATION 5 VALUE		
Active	Y	Default UOM	CASE
Storage Type	UPRIGHT	Stock Extra Field 3	EXTRA 3 ON STOCK MASTER FOR STOCKCODE003
		Stock Extra Field 6	EXTRA 6 ON STOCK MASTER FOR STOCKCODE003
Stock Duration 1	STOCK DURATION 1 VALUE	Stock Duration 2	STOCK DURATION 2 VALUE
Stock Duration 3	STOCK DURATION 3 VALUE	Stock Duration 4	STOCK DURATION 4 VALUE
Stock Duration 5	STOCK DURATION 5 VALUE		

The fields visible and the labels used will depend on the system language configuration. The screenshot above shows all available fields. When the UOM (Container Type) option is selected the page will show a table of the UOM data with one row for each unit of measure.

Detail View

☐ Details
 ☒ UOM

UOM	Container Type Description	Previous Type Factor	UOM Total Units	Net Weight	Gross Weight	Width	Height	Depth	Volume	EAN Code
UNIT	INDIVIDUAL UNIT	UNIT TO CASE: 50	1	0.2500	0.3000	10.00	5.00	5.00	250.00	0123456789001001
CASE	CARDBOARD CASE	CASE TO PALLET: 100	50	12.5000	15.0000	50.00	25.00	10.00	1.11	0123456789003002
PALLET	STANDARD PALLET		5000	1250.0000	1500.0000	100.00	125.00	100.00	1250000.00	0123456789003003

When the image option is selected the page will show the image file. This option will only be available if an image file is present. The image file for a stock master record is defined as a file called:

`pppppppppp/images/stock/www/ooo/ssssssssss.xxx` where:

`pppppppppp` - is replaced by the *Calidus Portal* external data store directory.

`images` - is a hard-coded images directory within the *Calidus Portal* external data store directory.

`stock` - is a hard-coded stock directory within the images directory.

`www` - is replaced by the three-character warehouse ID of the stock master record.

`ooo` - is replaced by the three-character owner code of the stock master record.

`ssssssssss` - is replaced by the stock code of the stock master record.

`xxx` - is replaced by the image file extension.

The page footer will include an export section with an export level drop-down and an export button.

Level Stock Code
Export

Back

Clicking on the export button will run the stock master export process for the selected level and the stock master data record that is displayed. The page will also include a back button which will return the user to the previous page.



12 Snapshot Enquiry

12.1 Parameter Page

The Parameter Selection page allows the user to enter search criteria to enquire on the stock inventory data (i.e. as uploaded on the INV message).

The screenshot shows a web form titled "Selection". It contains the following fields and controls:

- Owner:** A dropdown menu with "All" selected.
- Warehouse:** A dropdown menu with "All" selected.
- Snapshot ID:** A single-line text input field.
- Snapshot Date:** Two text input fields labeled "From" and "To", followed by a "Clear" button.
- Stock Code:** Two text input fields labeled "From" and "To".
- Location:** A single-line text input field.
- Pallet ID:** A single-line text input field.
- Pallet ID 2:** A single-line text input field.
- Pallet ID 3:** A single-line text input field.
- Batch ID:** A single-line text input field.
- Batch ID 2:** A single-line text input field.
- Batch ID 3:** A single-line text input field.

Below the form, there are two buttons: "Find" and "Reset".

The parameters visible and the labels used will depend on the system language configuration, but the complete list will be as follows:

- Owner - The owner of the stock inventory record. A drop-down of available owners, as determined by the restrictions set against the users group. This drop-down will also include an 'All owners' option.
- Warehouse - This will be set from a drop-down of available warehouses, as determined by the restrictions set against the users group. This drop-down will also include an 'All Warehouses' option.
- Snapshot ID - This will accept a free text value up to 20 characters.
- Snapshot Date Range - Clicking on either field will call a pop-up calendar to allow the user to select the date. The clear button can be used to reset the dates to blank.
- Stock Code Range - These fields will each accept a free text value up to 20 characters.
- Location - This will accept a free text value up to 20 characters.
- Pallet ID 1 - This will accept a free text value up to 20 characters.
- Pallet ID 2 - This will accept a free text value up to 20 characters.
- Pallet ID 3 - This will accept a free text value up to 20 characters.
- Batch ID 1 - This will accept a free text value up to 50 characters.
- Batch ID 2 - This will accept a free text value up to 50 characters.
- Batch ID 3 - This will accept a free text value up to 50 characters.

The warehouse and owner selection will match stock inventory data where the owner/warehouse matches the selected value or the 'All' value is selected.

The snapshot date range will match stock inventory data where the snapshot date is within the specified date range (inclusive of the specified dates).

For all free text fields:

- A blank value will match all stock inventory data.
- Matches are not case sensitive.
- Pattern matching is not available.

The user must specify at least one of the following required parameters:



Snapshot ID, Snapshot Date Range, Owner, Stock Code Range, Location, Pallet ID 1, Pallet ID 2, Pallet ID 3, Batch ID 1, Batch ID 2, Batch ID 3.

Clicking find button will retrieve any stock inventory data that matches the specified parameters.

If the data retrieved includes multiple snapshot ID's the snapshot selection page (see section 5.2.2) will be called to display the snapshot ID's.

If the data retrieved includes a single snapshot ID's but multiple stock codes the stock selection page (see section 5.2.3) will be called to display the stock codes.

If the data retrieved includes a single snapshot ID's and a single stock codes the detail page (see section 5.2.4) will be called to display the inventory data.

If no data is retrieved the snapshot selection page will be called to display the 'No Data' message.

Clicking the reset button will reload the page restoring all fields to their default/blank values

12.1.1 Snapshot Selection Page

This page will display a table of the snapshot ID's that match the specified parameters.

Snapshot ID	Snapshot Date
202303291547	29-Mar-23 15:47
202303291544	29-Mar-23 15:44

The data will initially be shown in snapshot ID sequence but the user can sort the data by a specific column by clicking on the column heading.

Clicking on a snapshot ID will call the details page (see section 5.2.3) for that snapshot ID.

The page footer:



Will include an export section with an export level drop-down and an export button.

Clicking on the export button will run the stock inventory export process for the selected level and the snapshot ID data that is for the displayed snapshot ID's and matches any selection parameters.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page will also include a back button which will return the user to the parameter page.

12.1.2 Stock Selection Page

This page will display the single snapshot ID (i.e. as selected in the snapshot selection page or the only snapshot ID that matches the selection parameters) and a table of the stock codes for that snapshot ID which matches the specified parameters.



Selected															
Snapshot ID: 202303201547															
Snapshot Date: 29-Mar-23 15:47															
Image	Warehouse	Owner	Stock Code	Description	Default UOM	Inventory Qty 1	Inventory Qty 2	Inventory Qty 3	Inventory Qty 4	Inventory Qty 5	Inventory Qty 6	Inventory Qty 7	Inventory Qty 8	Inventory Qty 9	Inventory Qty 10
WH1	OB5	STOCKCODE001	LONG DESCRIPTION FOR STOCK CODE 001	CASE	73746	14655	15134	-14656	-38432	3255	26	30320	1539	14520	
WH1	OB5	STOCKCODE002	LONG DESCRIPTION FOR STOCK CODE 002	CASE	74343	15906	15115	-15923	-40281	3893	24	61232	1445	16397	
WH1	OB5	STOCKCODE003	LONG DESCRIPTION FOR STOCK CODE 003	CASE	76433	15420	14853	-13665	-10877	4872	31	43569	1586	14278	
WH1	OB5	STOCKCODE004	LONG DESCRIPTION FOR STOCK CODE 004	CASE	79129	14700	14795	-15742	-41510	4926	36	38419	1485	15614	
WH1	OB5	STOCKCODE005	LONG DESCRIPTION FOR STOCK CODE 005	CASE	73273	15438	13482	-15782	-41225	5748	35	55870	1615	15449	
WH1	OB5	STOCKCODE006	LONG DESCRIPTION FOR STOCK CODE 006	CASE	75624	13774	16724	-15543	-41449	5120	31	43839	1378	14965	
WH1	OB5	STOCKCODE007	LONG DESCRIPTION FOR STOCK CODE 007	CASE	81620	14557	14176	-13807	-40022	4825	28	42221	1468	16063	
WH1	OB5	STOCKCODE008	LONG DESCRIPTION FOR STOCK CODE 008	CASE	84062	15155	13629	-15737	-10825	5530	30	49141	1489	14878	
WH1	OB5	STOCKCODE009	LONG DESCRIPTION FOR STOCK CODE 009	CASE	72719	15199	13704	-13267	-40400	8452	29	48888	1555	16204	
WH1	OB5	STOCKCODE010	LONG DESCRIPTION FOR STOCK CODE 010	CASE	79874	14258	15649	-16276	-40022	5388	30	48537	1542	15525	

The data will initially be shown in warehouse, owner then stock code sequence but the user can sort the data by a specific column by clicking on the column heading (**except for the quantity columns**).

The quantity columns included in this table will depend on the system language configuration.

Clicking on a stock code will call the details page (see next section) for the selected snapshot ID and the stock code (and the warehouse ID and owner of the same row).

The page footer:

Level: Snapshot ID/Stock Code
Export

Navigation
1/1
No. Rows: 30
Back

Will include an export section with an export level drop-down and an export button.

Clicking on the export button will run the stock inventory export process for the selected level and the snapshot ID data that is for the displayed snapshot ID and matches any selection parameters.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page will also include a back button which will return the user to the previous page.

12.1.3 Details Page

This page will display the stock inventory data for a specific snapshot ID, warehouse, owner and stock code.

Selected

Snapshot ID: 202303201547

Snapshot Date: 29-Mar-23 15:47

Warehouse: WH1

Owner: OB5

Stock Code: STOCKCODE006

Description: LONG DESCRIPTION FOR STOCK CODE 006

UOM: All

Line Reference	Location	Pallet ID	Pallet ID 2	Pallet ID 3	Pallet Type	Batch ID	Batch ID 2	Batch ID 3	Inventory Date 1	Inventory Date 2	Inventory Date 3	Inventory Date 4	Inventory Date 5	SSCC	UOM	Inventory Qty 1	Inventory Qty 2	Inventory Qty 3
LINE 000051	BLK01/11/01				Standard Pallet	BATCH1000000051			21-Feb-13					012345678901846	UNIT	75	12	
LINE 000051	BLK01/11/01				Standard Pallet	BATCH1000000051			21-Feb-13					012345678901846	CASE	8729	1081	
LINE 000051	BLK01/11/01				Standard Pallet	BATCH1000000051			21-Feb-13					012345678901846	PALLET	800	134	
LINE 000052	BLK01/11/02				Standard Pallet	BATCH1000000052			22-Feb-13					0123456789056304	UNIT	82	16	
LINE 000052	BLK01/11/02				Standard Pallet	BATCH1000000052			22-Feb-13					0123456789056304	CASE	7707	1635	
LINE 000052	BLK01/11/02				Standard Pallet	BATCH1000000052			22-Feb-13					0123456789056304	PALLET	899	196	
LINE 000053	BLK01/11/03				Standard Pallet	BATCH1000000053			23-Feb-13					0123456789060491	UNIT	72	17	

The header section will display the selected snapshot ID (and its associated date), warehouse, owner and stock code/description.

The header section will also include a unit of measure (Container Type) selection drop-down. This will initially have the 'All' option selected and will include each of the units of measure that have been uploaded on the stock master for this warehouse, owner and stock code. Changing this drop-down will limit the data to records for the selected unit of measure only (or all units of measure if the 'All' option is selected).

The detail section of the page will show a table of the stock inventory data for the selected snapshot ID, warehouse, owner and stock code, including either all units of measure or a specific unit of measure based on the unit of measure selection drop-down value.

The data will initially be shown in the sequence it was uploaded. When displaying multiple units of measure for the same inventory line these will initially be sorted based on the unit of measure (smallest to largest). The user can sort the data by a specific column by clicking on the column heading (except for the quantity columns).

The columns included in this table and the column headings used will depend on the system language configuration.



The page footer:



Includes an export section with an export level drop-down and an export button. Clicking on the export button will run the stock inventory export process for the selected level and the snapshot ID data that is for the selected snapshot ID, warehouse, owner, stock code and unit of measure and which matches any selection parameters.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page will also include a back button which will return the user to the previous page.



13 Stock Transaction Enquiry

13.1 Parameter Page

The Parameter Selection page allows the user to enter search criteria to enquire on the stock movement data (i.e. as uploaded on the MOV message).

Selection

Owner:

Warehouse:

Stock Code: From To

Transaction Date: From To

Transaction ID:

Location:

Pallet ID:

Pallet ID 2:

Pallet ID 3:

Batch ID:

Batch ID 2:

Batch ID 3:

The parameters visible and the labels used will depend on the system language configuration, but the complete list will be as follows:

- Owner - The owner of the transaction record. A drop-down of available owners, as determined by the restrictions set against the users group
- Warehouse - This will be set from a drop-down of available warehouses, as determined by the restrictions set against the users group.
- Stock Code - Allows the entry of a stock code range.
- Transaction Date - Allows the entry of a transaction date range. Clicking on either field will pop-up a calendar to allow the user to select the date. The clear button can be used to reset the dates to blank.
- Transaction ID - This will accept a free text value up to 20 characters.
- Location ID - Allows the entry of a location Id
- Pallet ID 1 to 3 - Allows the entry of a Pallet Id's
- Batch ID 1 to 3 - Allows the entry of a batch Id's

The warehouse and owner selection will match stock transaction data where the owner/warehouse matches the selected value.

The transaction date range will match stock transaction data where the transaction date is within the specified date range (inclusive of the specified dates).

For all free text fields:

- A blank value will match all transaction data.
- Matches are not case sensitive.
- Pattern matching is not available.

The user must specify at least one of the following required parameters:

Stock Code Range, Transaction Date Range, Transaction ID, Batch Id, Pallet Id or Location Id

Clicking find button will retrieve any stock transaction data that matches the specified parameters.



If the data retrieved includes multiple stock codes the stock selection page (see section 5.3.2) will be called to display the stock codes.

If the data retrieved includes a single stock codes the detail page (see section 5.3.3) will be called to display the transaction data.

If no data is retrieved the stock selection page will be called to display the 'No Data' message.

Clicking the reset button will reload the page restoring all fields to their default/blank values.

13.1.1 Stock Selection Page

This page will display a table of the stock codes which match the specified parameters.

Warehouse	Owner	Stock Code	Description
WH1	OBS	STOCKCODE001	LONG DESCRIPTION FOR STOCK CODE 001
WH1	OBS	STOCKCODE002	LONG DESCRIPTION FOR STOCK CODE 002
WH1	OBS	STOCKCODE003	LONG DESCRIPTION FOR STOCK CODE 003
WH1	OBS	STOCKCODE004	LONG DESCRIPTION FOR STOCK CODE 004
WH1	OBS	STOCKCODE005	LONG DESCRIPTION FOR STOCK CODE 005

The data will initially be shown in warehouse, owner then stock code sequence but the user can sort the data by a specific column by clicking on the column heading.

Clicking on a stock code will call the details page (see section 5.3.3) for that stock code (and the warehouse and owner of the same row).

The page footer:



Will include an export button. Clicking on the export button will run the stock transaction export process for the transaction that matches any selection parameters.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page will also include a back button which will return the user to the parameter page.

13.1.2 Details Page

This page will display the stock transaction data for a specific warehouse, owner and stock code.

The header section will display the selected warehouse, owner and stock code.

Selected			
Warehouse	WH1	Owner	OBS
Stock Code	STOCKCODE005		
Description	LONG DESCRIPTION FOR STOCK CODE 005		

The detail section of the page will show a table of the transactions for the selected warehouse, owner and stock code.



Transaction Date	Move Reason	Location	Pallet ID	Pallet ID 2	Pallet ID 3	Pallet Type	Batch ID	Batch ID 2	Batch ID 3	Inventory Date 1	Inventory Date 2	Inventory Date 3	Inventory Date 4	Inventory Date 5	SSCC	Move From	Move To	UOM	Quantity	
29-Mar-23 15:44	HOLD	BLK01/09/01					BATCH1000000041			11-Feb-13					0123456789032115	AVAIL	HELD	UNIT	41	
29-Mar-23 15:44	PICK	BLK01/09/02					BATCH1000000042			12-Feb-13					0123456789047515	AVAIL	ALLOC	UNIT	48	
29-Mar-23 15:44	MOVE	BLK01/09/03					BATCH1000000043			13-Feb-13					0123456789060049	TRANS	AVAIL	CASE	70	
29-Mar-23 15:44	RELEASE	BLK01/09/04					BATCH1000000044			14-Feb-13					0123456789018701	HELD	AVAIL	CASE	35	
29-Mar-23 15:44	RECEIPT	BLK01/09/05					BATCH1000000045			15-Feb-13					0123456789066602		HELD	PALLET	85	
29-Mar-23 15:44	HOLD	BLK01/10/01					BATCH1000000046			16-Feb-13					0123456789090353	AVAIL	HELD	PALLET	81	
29-Mar-23 15:44	HOLD	BLK01/10/02					BATCH1000000047			17-Feb-13					0123456789027048	AVAIL	HELD	CASE	41	
29-Mar-23 15:44	SALE	BLK01/10/03					BATCH1000000048			18-Feb-13					0123456789028510	ALLOC		CASE	44	
29-Mar-23 15:44	SALE	BLK01/10/04					BATCH1000000049			19-Feb-13					0123456789072525	ALLOC		CASE	65	
29-Mar-23 15:44	PICK	BLK01/10/05					BATCH1000000050			20-Feb-13					0123456789025972	AVAIL	ALLOC	CASE	23	
29-Mar-23 15:47	ALLOC	BLK01/09/01					BATCH1000000041			11-Feb-13					0123456789029049	AVAIL	ALLOC	CASE	9	

The data will initially be shown in the transaction date sequence. The user can sort the data by a specific column by clicking on the column heading (except for the quantity column).

The columns included in this table and the column headings used will depend on the system language configuration.

Each row will include a '+' button. Clicking on this will expand that row to show additional information.

29-Mar-23 15:44	PICK	BLK01/01/02					BATCH1000000002			03-Jan-13					0123456789013232	ALLOC	AVAIL	UNIT	98	
Transaction User										OBSOBN										
Move From Description										Allocated Stock										
Move To Description										Available Stock										
Transaction ID										230329154452_00000002										

With the additional information shown the '+' button will change to a '-' button, clicking this will collapse the row again.

The column heading for this last column will include a '+' and a '-' button. These will expand or collapse the additional information for all rows.

The page footer:

Export	Navigation	<<	<	1/1	>	>>	No. Rows	25	Back
--------	------------	----	---	-----	---	----	----------	----	------

Will include an export button. Clicking on the export button will run the stock transaction export process for the transactions displayed.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page footer will also include a back button which will return the user to the previous page.



14 Journal Transaction Enquiry

14.1 Parameter Page

The Parameter Selection page allows the user to enter search criteria to enquire on the stock movement data (i.e. as uploaded on the MOV message).

The screenshot shows a web form titled 'Selection'. It contains the following fields and controls:

- Owner:** A dropdown menu with 'OBS : OBS Owner' selected.
- Warehouse:** A dropdown menu with 'All' selected.
- Stock Code:** A text input field with a '+' button to its right.
- Batch id:** A long text input field.
- SSCC:** A text input field with a '+' button to its right.
- Transaction Type:** A dropdown menu with 'All' selected.
- Stock Status:** A dropdown menu with 'All' selected.
- ID:** A text input field.
- Transaction Date:** Two text input fields labeled 'From' and 'To'.
- Customer/Supplier:** A long text input field.

Below the form are two buttons: 'Find' and 'Reset'.

The parameters visible and the labels used will depend on the system language configuration, but the complete list will be as follows:

- Owner - The owner of the transaction record. A drop-down of available owners, as determined by the restrictions set against the users group
- Warehouse - This will be set from a drop-down of available warehouses, as determined by the restrictions set against the users group.
- Stock Code - Allows the entry of a stock code. Clicking on the '+' button allows the user to enter multiple stock codes.
- Batch ID - Allows the entry of a batch Id.
- Location - Allows the entry of a Location code (not displayed on screenshot).
- Pallet Id - Allows the entry of a Pallet Id (not displayed on screenshot).
- SSCC - Allows the entry of an SSCC code. Clicking on the '+' button allows the user to enter multiple SSCC codes.
- Transaction Type - Allows the entry of a transaction type e.g. REC, REL, DEL etc. from a list of the available transaction types.
- Stock Status - Allows the selection of the stock status e.g. Available, Held etc.
- Transaction Date Range - Clicking on either field will call a pop-up calendar to allow the user to select the date. The clear button can be used to reset the dates to blank.
- ID - The unique ID for the transaction
- Customer/Supplier - Allows the free-text entry of a Customer or Supplier.

The warehouse and owner selection will match stock transaction data where the owner/warehouse matches the selected value.

The transaction date range will match stock transaction data where the transaction date is within the specified date range (inclusive of the specified dates).

For all free text fields:

- A blank value will match all transaction data.
- Matches are not case sensitive.
- Pattern matching is not available.



The user must specify at least one of the following required parameters:

Stock Code Range, Transaction Date Range, Transaction ID, Location, Pallet IDs, Batch IDs.

Clicking find button will retrieve any stock transaction data that matches the specified parameters.

If no data is retrieved the stock selection page will be called to display the 'No Data' message.

Clicking the reset button will reload the page restoring all fields to their default/blank values.

14.1.1 Details Page

This page will display the stock transaction data for a specific warehouse, owner and stock code(s).

Type	Owner	W/H	Stock Code	Batch Id	Stock Status	Inventory Date 2	Inventory Date 1	Transaction Date	ID	Customer/Supplier	Quantity	SSCC	User
Movement	OES	WH1	STOCKCODE001	BATCH100000008	ALLOCATED STOCK		07-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000009		91	0123456789001240	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000001	AVAILABLE STOCK		02-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000001		12	01234567890011704	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000008	AVAILABLE STOCK		09-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000008		53	01234567890066930	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000003	HELD STOCK		04-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000003		77	0123456789004647	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000008	AVAILABLE STOCK		09-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000008		63	0123456789004827	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000003	HELD STOCK		04-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000003		10	0123456789012865	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000010	STOCK IN TRANSIT		11-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000010		47	0123456789002954	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000005	HELD STOCK		06-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000005		69	0123456789004267	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000010	AVAILABLE STOCK		11-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000010		91	01234567890048731	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000005	AVAILABLE STOCK		06-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000005		18	0123456789010865	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000007	HELD STOCK		08-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000007		66	01234567890046767	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000002	HELD STOCK		03-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000002		2	0123456789010570	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000007	AVAILABLE STOCK		08-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000007		16	01234567890072829	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000002	AVAILABLE STOCK		03-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000002		98	0123456789013233	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000009	AVAILABLE STOCK		10-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000009		37	0123456789005086	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000004	AVAILABLE STOCK		05-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000004		94	01234567890027402	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000009	AVAILABLE STOCK		10-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000009		2	0123456789015175	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000004	STOCK IN TRANSIT		05-Jan-13 00:00	29-Mar-23 15:44	230329154432_0000004		74	0123456789014407	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000008	AVAILABLE STOCK		07-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000008		4	0123456789013966	OESGEN
Movement	OES	WH1	STOCKCODE001	BATCH100000001	HELD STOCK		02-Jan-13 00:00	29-Mar-23 15:47	230329154733_0000001		2	0123456789006253	OESGEN

The data will initially be shown in transaction type sequence. The user can sort the data by a specific column by clicking on the column heading (except for the quantity columns).

The columns included in this table and the column headings used will depend on the system language configuration.

The page footer:



Will include an export button. Clicking on the export button will run the journal transaction export process for the transactions displayed.

The page footer will also include a navigation section which will allow the user to navigate between multiple pages of results and to define how many rows will appear on each page.

The page footer will also include a back button which will return the user to the previous page.

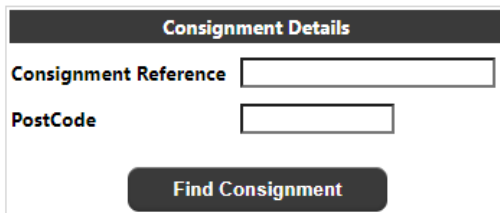


15 TTM gateway

A Customer Tracking gateway page is available for customers, the link to which will be provided in the email/SMS sent to the customer when the order is planned or en route by an <external> system. On clicking the link provided in the notification email, the customer will either be taken to the parameter page (where they will be asked to enter the consignment reference from the email and their postcode) or the results page, if both the reference and postcode are sent as part of the link.

15.1 Gateway Parameter Page

When the user clicks on the URL provided by the <external> system they will be taken to a page on the *Calidus* Portal system:



Consignment Details	
Consignment Reference	<input type="text"/>
PostCode	<input type="text"/>
<input type="button" value="Find Consignment"/>	

The user will enter the following information:

- Consignment Reference - The consignment/order number. Note that if passed on the URL, this will be pre-populated.
- Postcode - The Postcode for the consignment/order. This must match the postcode stored on the system against the order, but it does not need to match the case or spacing as these will be removed for the comparison.

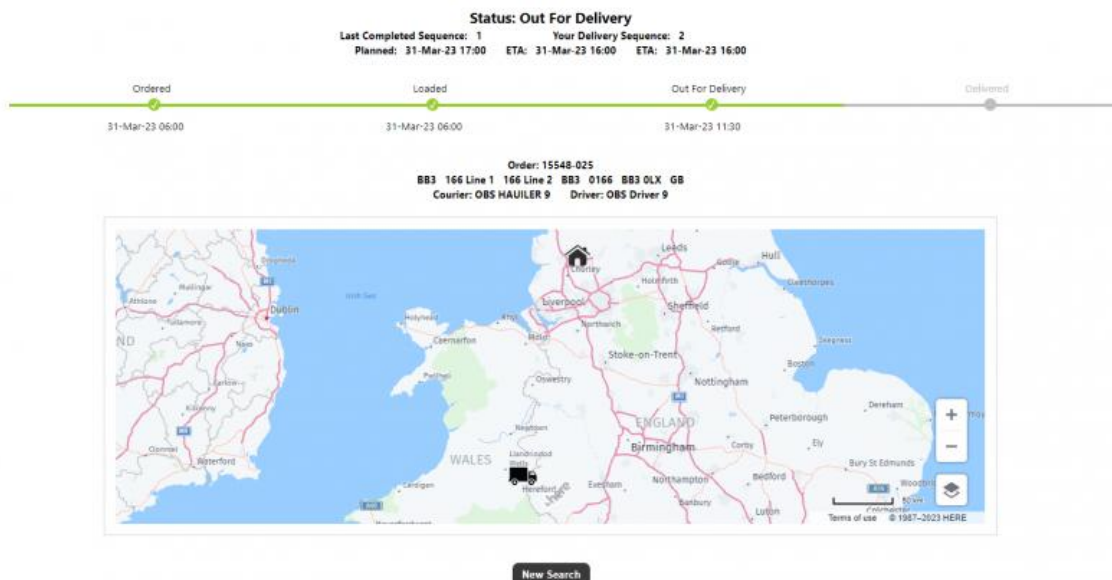
Once the two fields have been entered, the user should click on the "Find Consignment" button to retrieve the details for the consignment/order.

The *Calidus* Portal will retrieve the current information from the <external> system then display the results page (see section 7.2)

15.2 Gateway Results Page

The results page will consist of a header section, a progress bar, delivery/collection information and any status related information.





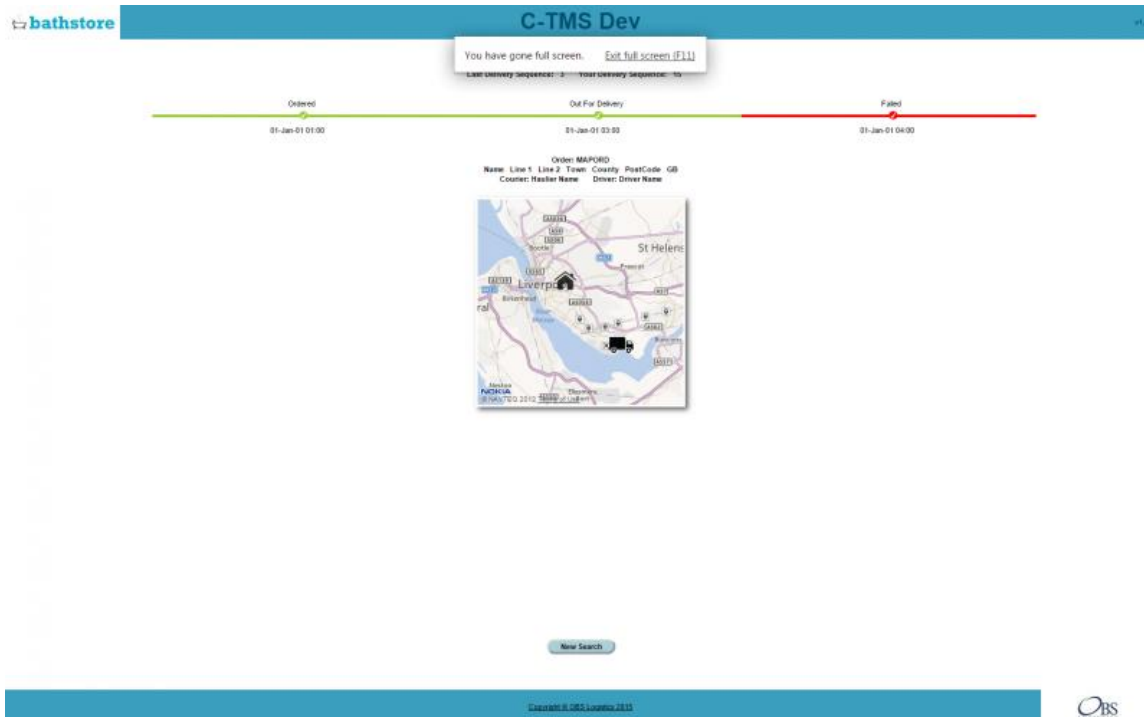
The information shown in some of these will depend on the order type (i.e. a delivery order or a collection order) and the order status. The order status will be calculated for the order as follows:

- **Ordered** - The order exists and does not match any other status.
- **Out For Delivery** - The order is a delivery order and the delivery trip has been marked as started (i.e. has a start date).
- **Out For Collection** - The order is a collection order and the collection trip has been marked as started (i.e. has a start date).
- **Delivered** - The order is a delivery order and an arrival date is set for the orders "to" location.
- **Collected** - The order is a collection order and an arrival date is set for the orders "from" location.
- **Cancelled** - An order that has been marked as cancelled (i.e. has a status of "CANCELLED"). **Failed** - An order that has been marked as failed (i.e. has a status of "FAILED").

The header section will show the status of the order. If the order status is "Out For Delivery" or "Out For Collection" this will also include the last completed stop and the delivery/collection stop. The last completed stop will show the last completed stop on the delivery trip (for delivery orders) or the collection trip (for collection orders). The delivery/collection stop will show the stop for the delivery or collection of the order (depending on the order type).

If the order status is failed the final stage will be labelled as "Failed". In this case the final stage will be shown as "complete" but will use a red bar (instead of the usual green).





If the order status is not failed the final stage will delivered/collected (depending on the order type).

The ordered stage will show the ordered date.

The out for delivery and out for delivery stages will show the date the delivery or collection trip was started.

The delivered and failed stages will show the arrival date at the delivery or collection location.

The collection/delivery information section will show the order reference, the delivery or collection address (depending on the order type), the haulier name and the driver name.

Order: 11372-038

N14 1879 Line 1 1879 Line 2 N14 1879 N14 7EL GB
Courier: OBS HAULER 8 Driver: OBS Driver 8

Below the collection/delivery information section the page will show any status related information.

The contents of the status related information section will depend on the status of the order.

If the order status is 'ordered' this will be blank.

If the order status is 'out for delivery', 'out for collection', 'delivered' or 'collected' a map will be displayed.

The map will show a 'home' symbol for the delivery location of the order (for delivery orders) or the collection location of the order (for collection orders), and a 'truck' symbol for the last known location of the truck. This will equate to the last known GPS position of the truck (if available) or the last completed stop on the delivery trip (for delivery order) or the collection trip (for collection orders). If no stops on the trip have been completed and there is no GPS position, the truck icon will not be displayed.

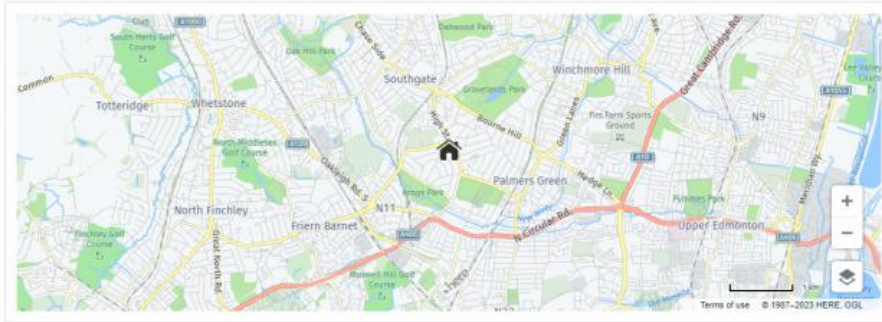
If the status is 'delivered' or 'collected' only the 'home' symbol for the delivery/collection location of the order will be shown, but an additional section will show a signatory name and signature if this has been provided for the order.



Status: Delivered



Order: 11372-038
 N14 1879 Line 1 1879 Line 2 N14 1879 N14 7EL GB
 Courier: OBS HAULER 8 Driver: OBS Driver 8



Signed By

 MIMOUSE



16 Portal Configuration - TTM

The following tables document the configuration options for the TTM module on the *Calidus* Portal system.

Section	Item	Admin*	Values	Description
CORE_CONFIG	ENQUIRY_WILDCARD		No, Yes	Allow Percent Wildcard in Order Enquiry?
CORE_CONFIG	ORDER_BY_YEAR	Y	No, Yes	Key orders by year?
CORE_CONFIG	QTY_DP_D		0, 1, 2, 3	Decimal Places for Type D stock codes
CORE_CONFIG	QTY_DP_S		0, 1, 2, 3	Decimal Places for Type S stock codes
CORE_CONFIG	QTY_DP_T		0, 1, 2, 3	Decimal Places for stock code totals
CORE_CONFIG	QTY_D_S		DU, Stock	System default to stock type S or D?
CORE_CONFIG	USE_PARTNERS		No, Yes	Use Partner Config?
CUST_VIS	DATA_REFRESH		Disabled, Auto, 2, 5, 10, 15	Data refresh rate, in Minutes
CUST_VIS	DEL_WIN_A		5, 15, 30, 60, 90	Delivery Window After, in Minutes
CUST_VIS	DEL_WIN_B		5, 15, 30, 60, 90	Delivery Window Before, in Minutes
CUST_VIS	ENABLED		No, Yes	Is Customer Visibility available?
CUST_VIS	KEEP_DELAYED		Today, 1, 2, 4, 6, 8, 12	How long to keep Delayed orders on the Page, in Hours
CUST_VIS	ORD_EVENT_DEFAULT		Summary, Detail	Default Summary or Detail for Order Events?
CUST_VIS	ORD_EVENT_DETAIL		ORD~Received, TRP~Planned, BOO~Booked, ALC~Allocated, PCK~Picked, LOA~Loaded, MAR~Marshalled, DEP~Despatched, OIT~In Transit, ARR~Arrived, DEL~Delivered, SCN~Scanned/POD, CAN~Cancelled	Event Types to display in Events Detail
CUST_VIS	ORD_EVENT_SUMMARY		ORD~Received, ALC~Allocated, PCK~Picked, LOA~Loaded, MAR~Marshalled, DEP~Despatched, ARR~Arrived, DEL~Delivered	Event Types to display in Events Summary
CUST_VIS	ORD_ITEM_DEFAULT		Summary, Detail	Default Summary or Detail for Items?
CUST_VIS	PAGE_REFRESH		Disabled, 5, 10, 15, 30, 60, 120, 180	Page refresh rate, in Seconds
CUST_VIS	POD_EVENT		DEL, SCN	Use DEL or SCN event to trigger POD visibility?
CUST_VIS	SHOW_ARRIVED		Today, 15 Mins, 30 Mins, 1 Hour, 2 Hrs, 4 Hrs, 6 Hrs, 8 Hrs, 12 Hrs, None	Time to keep Arrived Orders on the page
CUST_VIS	SHOW_DEL_A		Today, 15 Mins, 30 Mins, 1 Hour, 2 Hrs, 4 Hrs, 6 Hrs, 8 Hrs, 12 Hrs, None	Time to keep Delivered Orders [Amber] on the page
CUST_VIS	SHOW_DEL_C		Today, 15 Mins, 30 Mins, 1 Hour, 2 Hrs, 4 Hrs, 6 Hrs, 8	Time to keep Cancelled Orders on the page




Section	Item	Admin*	Values	Description
			Hrs, 12 Hrs, None	
CUST_VIS	SHOW_DEL_G		Today, 15 Mins, 30 Mins, 1 Hour, 2 Hrs, 4 Hrs, 6 Hrs, 8 Hrs, 12 Hrs, None	Time to keep Delivered Orders [Green] on the page
CUST_VIS	SHOW_DEL_R		Today, 15 Mins, 30 Mins, 1 Hour, 2 Hrs, 4 Hrs, 6 Hrs, 8 Hrs, 12 Hrs, None	Time to keep Delivered Orders [Red] on the page
CUST_VIS	SHOW_PLANNED		Today, 1, 2, 4, 6, 8, 12, None	No. Hours of planned orders to retrieve
CUST_VIS	USE_ETA		No, Yes	Use Current ETA for selection if available
CUST_VIS	USE_STOP_ONTIME		No, Yes	Always use the Stop time for On-Time calculations?
CUST_VIS	VIEW_TYPE		Deliveries (Book Date), Deliveries (Planned Date), Collections, All	View Deliveries, Collections or Both?
CUST_VIS	WINDOW		No, Yes	Display Planned Dates as Window?
DROP_VIEW	SHOW_ADDRESS		No, Yes	Show Address Details of stops not owned/hailed?
EMAIL_CONFIG	OWNER_EXCLUDE			Comma separated list of Owners to exclude from event email notifications [OLD]
ENQUIRY_CONFIG	RT_EXCLUDE			Comma separated list of Reason TYPES to exclude from display in Order Enquiry Detail
EVENT_CONFIG	LOC_EVENTS		No, Yes	Use additional Location based Events?
ORD_AIRPORT	COL_DEL		Both, Collection, Delivery	Determines whether collections or deliveries are displayed on the page
ORD_AIRPORT	DATA_REFRESH		Auto, 2, 5, 10, 15, 20	The default time in minutes between data refreshes. Auto means that whenever the last page of data is reached, the system will refresh and start again. If only one page of data is displayed in Auto mode, then it will refresh every 2 minutes.
ORD_AIRPORT	DEL_QTY_ERR		C~Cancelled, R~Reason Code, Q~Quantity	If any of these are selected, a delivered/collected order will be set to RED if there is an applicable exception
ORD_AIRPORT	DEL_WIN_POST		0, 5, 10, 15, 25, 30, 60	The No. minutes after the PLANNED collection/delivery date/time. This will define the end of the arrival window in which any PLANNED orders are marked as AMBER
ORD_AIRPORT	DEL_WIN_PRE		0, 5, 10, 15, 25, 30, 60	The No. minutes before the PLANNED collection/delivery date/time. This will define the start of the arrival window in which any PLANNED orders are marked as AMBER



Section	Item	Admin*	Values	Description
ORD_AIRPORT	ETA_CHANGE		No, Yes	Allow override/acceptance of RED status until later ETA received
ORD_AIRPORT	NUM_REC		All, 10, 20, 30, 40, 50	Default No. Records to display per page
ORD_AIRPORT	PAGE_REFRESH		Off, 5, 10, 15, 30, 60, 120, 180	The default time in seconds between switching page data.
ORD_AIRPORT	TIME_LIMIT_GREEN		No Limit, 1, 5, 15, 30, 60, 120, 180, 720	The number of minutes past the actual collection/delivery time that a CLEAN fully collected or delivered order (i.e. GREEN with a tick) will remain on the board after it has been collected/delivered.
ORD_AIRPORT	TIME_LIMIT_LATE		No Limit, 1, 5, 15, 30, 60, 120, 180, 720	The number of minutes past the actual collection/delivery time that a LATE collection or delivery (i.e. AMBER) will remain on the board
ORD_AIRPORT	TIME_LIMIT_RED		No Limit, 1, 5, 15, 30, 60, 120, 180, 720	The number of minutes past the collection/delivery time that an order with EXCEPTIONS (i.e. RED with a tick) will remain on the board after it has been collected/delivered.
ORD_AIRPORT	TRACK_TIME		1, 2, 4, 8, 12, Today	The No. Hours of collection/delivery data to display
ORD_AIRPORT	TRIP_STOP_ORDER		Trip, Stop, Order	The default value for View By
ORD_AIRPORT	USE_CURRENT		No, Yes	Always use current time instead of planned
ORD_AIRPORT	WINDOW_TYPE		None, System, Customer, Other	Window Type - (N)one, (S)ystem Planned Window, (C)ustomer Planned Window or (X) Use Planned Window but display Planned Arrival
ORD_AIRPORT	WIN_ARR_DEP		Arr-Dep, Arr, Dep	If Window Type = N - Use ARR-DEP, ARR only or DEP only
POLLER	TEMPLATE_OWNER			Owner to clone on new owner creation
TRACKING	DEFAULT_STOP_TIME		None, 5, 10, 15, 20, 30, 60, 90, 120	Stop Duration Time in minutes
TRACKING	END_OF_DAY		1:59, 2:59, 3:59, 4:59, 5:59, 6:59, 7:59, 8:59, 9:59, 10:59, 11:59, 12:59, 13:59, 14:59, 15:59, 16:59, 17:59, 18:59, 19:59, 20:59, 21:59, 22:59, 23:59	Time for end of working day
TRACKING	ETA_ADVANCE_TIME		2, 4, 6, 8, 10, 12	No. Hours in future to retrieve ETAs based on planned time
TRACKING	ETA_EXPIRE_LIMIT		30 Mins, 1 Hour, 2 Hours, 3 Hours, 4 Hours, 8 Hours	The amount of time to consider a last known position as out-of-date
TRACKING	ETA_SORT_SEQ		Planned Date, Stop Sequence	Sort Stops for ETA by Planned Date or Stop



Section	Item	Admin*	Values	Description
				Sequence
TRACKING	EVENT_EMAIL_URL			Base URL for Tracking in Events emails
TRACKING	ID_OR_PC		ID, Postcode	Determine stops by ID or Postcode
TRACKING	TRIP_HAULIER_INDEX		Trip, Haulier	Is Trip indexed by Trip or Trip/Haulier?
WEB_SERVICE	GET_TRIP_SORT_SEQUENCE		Trip ID (Ascending), Trip Start Date (Ascending)	getTrip response Sort Sequence

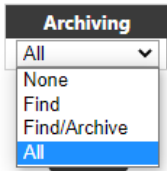
-  **Note:**
- Items marked "Admin" can only be changed by System Administrators



17 Archiving

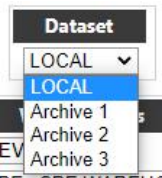
17.1 Archive Permissions

A setting will be available against the Users Group to define what Archiving actions the users within that group can perform.



17.2 Home Page

The Home page will allow the user to switch between the current data and a selected archive:



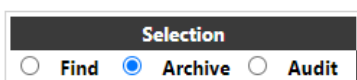
The default on login will always be the Live/Test system.

Note: If the users group is set to "No Actions" then this will not be available.

17.3 Archive Page

The Archive page on the *Calidus* Portal will allow the use to run an archive, view the ranges of data within each archive and enquire on an order or trip to find which archive contains the requested order/trip.

The page will contain a choice of "Find" "Archive" and "Audit"



The page will look at the User Group to determine whether to display the "Archive" or "Audit" Selections.

17.3.1 Find Section

This section will allow the user to find which archive a trip/order is located in from within the archives. The user can select by Trip, Order or *Calidus* TMS Reference:



Find			
Find By	TMS Ref ▼	TMS Ref	Find

The owner selection will use the restrictions that have been pre-set in the users group. If the data cannot be found in any of the archives, the message 'No Data' will be displayed. If the trip/order is found, then the archive will be displayed:

Archive ID	Archive Description	Archive Reference	Date Archived
ARC-001	Pre 2008	200802	06-Jul-2008

From this point, the user can go to the home page and select the appropriate archive then use the standard enquiries to find the detail for the order/trip.

17.3.2 Archive Section

This section will allow the user to perform the archive operations. The operations available will be determined by the setting held against the users group. For every option, the user will be offered a confirm prompt before any action is performed.

The second part of the Archive section will contain a list of the archives and information on the data contained within them, with the data sorted from newest to oldest.

Archive ID	Archive Description	Last Run	By	Date From	Date To	No. Orders	No. Trips	
ARC-003	2011 Onward	10-Jan-2010	PG	01-Jan-2011	31-Dec-2013	36725	3194495	?
ARC-002	2008-2010	02-Jan-2011	SH	01-Jan-2008	31-Dec-2010	32405	2143438	?
ARC-001	Pre 2008	06-Jul-2008	PG	04-Jun-2005	31-Dec-2007	21106	2053921	?

Clicking on the Question mark against a detail line will retrieve/display details of the 'data blocks' i.e. Archive References within the archive.

The actions which can be performed in the archive section are detailed below.

Rename Archive Description

Archive Operation	Rename			
Rename ▼	Archive Description ▼	LOCAL_ARC1 : Archive 1 ▼	As	
				Rename

The user will select either Archive Description i.e. the description of the database schema or Archive Reference i.e. the name given to an archive within the archive database followed by the description/reference to rename then the new description which will be validated that it does not already exist.

No actual archived data will be affected by the rename.

Note: For Archive Description, only the description will change, the I.D. of the schema will be unchanged.

Archive Data

Archive Operation	Archive			
Archive ▼	Archive Data Up To	Into Archive	Select... ▼	Archive Reference
				Archive

The user will select an 'Archive Data Up To' date from the date selector then an 'Into Archive' database followed by an 'Archive Reference' for the block of data being archived.

Move Archive



Archive Operation	Move		
Move	Archive Reference	Select...	Into Select... Move

The user will select a 'From Archive' then an 'Archive Reference' and finally an 'Into Archive' to move data from one archive into another. The 'Into Archive' will also contain the option to move data back into the current live/test system dataset.

The 'Archive Reference' drop-down will be multi-select so that all references can be selected, a single reference or multiple references as required.

Delete Archive Data

Archive Operation	Delete	
Delete	Archive Reference	Select... Delete

The user will select a 'From Archive' then an 'Archive Reference' to delete data from an archive.

The 'Archive Reference' drop-down will be multi-select so that all references can be selected, a single reference or multiple references.

Delete Owner

Archive Operation	Delete Owner		
Delete Owner	From Archive	Select...	Owner Delete

The user will select an Owner then a 'From Archive' to remove all order data from an archive for the selected owner. The owner dropdown will use the restrictions against the users group.

Delete All Data

Archive Operation	Delete All	
Delete All	Archive	Select... Delete

The user will select an 'Archive' to completely remove all data from an archive and delete the schema.

Note:

All Delete/Remove options will permanently remove data

with no recovery option

Note: For all the Delete/Remove options, there will be **NO** option to perform data deletion from the current live/test system dataset.

17.3.3 Audit Section

The Audit Section will display an audit of the archive operations performed on the system, sorted from newest to oldest.

Audit Date	Action	User	Archive From	Archive	Archive Description	Archive Reference	Date From	Date To	Owner	No. Trips	No. Orders
01-Jun-2012 09:11	MOVE	SH	ARC-001	ARC-002	Archive 2008-2011	Jan-June 11				68364	297464
01-Jun-2012 09:16	MOVE	SH	ARC-001	ARC-002	Archive 2008-2011	Jul-Dec 11				62334	192441
26-May-2013 09:00	CREATE	PG		ARC-002							
31-Aug-2012 23:34	DELOWN	SH		ARC-001					RKB	9585	49693
01-Dec-2011 09:11	ARCHIVE	SH		ARC-001	Pre 2008	Jan-June 11		30-Jun-2011		34287	210734
01-Jun-2012 12:23	ARCHIVE	PG		ARC-001	Pre 2008	Jul-Dec 11		31-Dec-2011		20494	193834
01-Mar-2011 11:04	CREATE	PG		ARC-001	Pre 2008						



18 Calidus Portal Web Service - TTM

A SOAP web service exists within the *Calidus* Portal application.

For the TTM module, the following methods are available:

Method Name	Description
getInfo	Returns basic information for the system i.e. system name and version. This can be used to test access to the Web Service
getTrip	Returns Trip information (and additionally Stop, Order, Order Detail and Pallet information) *
getOrder	Returns Order information (and additionally Order Detail and Pallet information) *

- These methods can be configured to include/exclude specific tags in the response.

18.1 Request Header

On all requests made to the *Calidus* Portal Web Service, a SOAP header will be required supplying a Username and Password.

The username and password used should correspond to a valid login account on the *Calidus* Portal system. The login information will be used to set the restrictions that the response will use to return the data i.e. the user's group will determine the restrictions setup against the user and these will be used (as they are in the actual TTM system) to restrict the data that the user can see. Any valid username/password can be used, including users where no restrictions have been added.

18.1.1 Response Header

The Response Header will be included on all responses from the *Calidus* Portal Web Service.

Parameter	Data Type	Format	Description
<response_id>	xs:string	A35	A unique ID for the web service response. This code (along with the response_datestamp) can be used to identify requests in the log files.
<response_datestamp>	xs:dateTime	XML Date/Time	A string date representing the time of the response as recorded on the logging table.
<response_code>	xs:int	999	The response code for the request. A return of 0 denotes a successful request/response and a return greater than 0 denotes an error. See section 10.1.6 for a complete list of codes and descriptions.
<response_code_desc>	xs:string	A50	The description of the response.
<record_count>	xs:int	99999	A count of the number of records contained in the response for the given method: <ul style="list-style-type: none"> • getTrip - the count will be the number of trips • getOrder - the count will be the number of orders

An example response header will be as follows:

```
<responseHdr>
<response_id>befc95d5-5a74-4ecb-a3c5-91242ede3619</response_id>
<response_datestamp>2015-12-31 00:00:00</response_datestamp>
<response_code>0</response_code>
<response_code_desc>OK</response_code_desc>
<record_count>1</record_count>
</responseHdr>
```



18.1.2 Response Field Configuration

The response returned from the web service will utilise the *Calidus* Portal Page Configuration to allow every field (with the exception of a few key fields where the show/hide and group types fields will be disabled) within the response to be returned or hidden.

Selection							
Search By	Web Service	Module	TTM	Section	TTM.getTrip.trip		
Description	Section	Page Key	ID	Sequence	System Default	Show/Hide	Group Types
<trip_id>	-	LOTS.getTrip.trip.trip_id	trip_id	#01	Y	Show	-
<hauler>	-	LOTS.getTrip.trip.hauler	hauler	#02	Y	Show	-
<hauler_name>	-	LOTS.getTrip.trip.hauler_name	hauler_name	#03	Y	Show	-
<hauler_contact>	-	LOTS.getTrip.trip.hauler_contact	hauler_contact	#04	Y	Show	-
<driver>	-	LOTS.getTrip.trip.driver	driver	#05	Y	Show	-
<driver_name>	-	LOTS.getTrip.trip.driver_name	driver_name	#06	Y	Show	-
<driver_contact>	-	LOTS.getTrip.trip.driver_contact	driver_contact	#07	Y	Show	-
<tractor>	-	LOTS.getTrip.trip.tractor	tractor	#08	Y	Show	-
<trip_trailer_id>	-	LOTS.getTrip.trip.trailer_id	trip_trailer_id	#09	Y	Show	-
<trip_trailer_type>	-	LOTS.getTrip.trip.trailer_type	trip_trailer_type	#10	Y	Show	-
<trip_status>	-	LOTS.getTrip.trip.trip_status	trip_status	#11	Y	Show	-
<trip_start_date>	-	LOTS.getTrip.trip.trip_start_date	trip_start_date	#12	Y	Show	-
<trip_lat>	-	LOTS.getTrip.trip.trip_lat	trip_lat	#13	Y	Show	-
<trip_lon>	-	LOTS.getTrip.trip.trip_lon	trip_lon	#14	Y	Show	-
<trip_ref>	-	LOTS.getTrip.trip.trip_ref	trip_ref	#15	Y	Show	-
<owning_depot>	-	LOTS.getTrip.trip.owning_depot	owning_depot	#16	Y	Show	-
<trip_schedule>	-	LOTS.getTrip.trip.trip_schedule	trip_schedule	#17	Y	Show	-
<last_updated>	-	LOTS.getTrip.trip.last_updated	last_updated	#18	Y	Show	-
<trip_reasons>	-	LOTS.getTrip.trip.trip_reasons	trip_reasons	#19	Y	Show	-
<stops>	-	LOTS.getTrip.trip.stops	stops	#20	Y	Show	-

The user can select 'Web Service' from the 'Search By' options, select the relevant module (TTM), the method they wish to configure (getTrip or getOrder) and then the section within the message e.g. TRIP, ORDER, REASON, ADDRESS etc. The page will then display all of the available fields in sequence within that section and the user can then choose whether to show (include) or hide (exclude) individual elements from the response.

Notes: The <detail_level> on the message will determine the detail level of the response, not the show/hide configuration.

Sections such as ORDER which can appear on both getTrip and getOrder may be configured separately for each method. Marking a whole section e.g. <pallet_details> as hidden will override any individual show settings within that section.

18.1.3 Method: getTrip

The getTrip method can be used to retrieve trip, stop and order information from the *Calidus* Portal.

Request Details

Parameter	Data Type	Format	Description
<detail_level>	xs:string	A1	The detail level of the Response: <ul style="list-style-type: none"> • T - Trip • S - Stop • O - Order • D - Order Details • P - Pallet Details (if available)
<trip_id>	xs:string	A20	A manifest no. that identifies a specific trip within the system
<trip_status>	xs:string	A12	A valid trip status: <ul style="list-style-type: none"> • ACCEPTED • EN-ROUTE • COMPLETED
<trip_schedule>	xs:string	YYMMDD	
<owning_depot>	xs:string	A12	

Note: A valid request header is required.

Validation - At least one of the parameters trip_id, trip_status or schedule must be supplied.



Additionally, if trip_status is "COMPLETED" then a schedule (or trip_id) **must** also be supplied. Owing depot is always optional.

Date limitation - If a schedule isn't supplied then a limit of 5000 trips will be imposed or 1000 if orders are requested. If a schedule is supplied all trips/orders on the schedule (dependent on other filter criteria) will be supplied. If the limit is exceeded a status of '2 - Record Limit Exceeded' will be returned with no trip records.

Response Details

<TRIP> Section

Field Name	Data Type	Format	Description
<trip_id>	xs:string	A20	A manifest no. that identifies a specific trip within the system
<haulier>	xs:string	A12	The ID of the haulier assigned to the trip
<haulier_name>	xs:string	A50	The name of the haulier assigned to the trip
<haulier_contact>	xs:string	A100	The contact details for the haulier
<driver>	xs:string	A10	The ID of the driver assigned to the trip
<driver_name>	xs:string	A50	The name of the driver assigned to the trip
<driver_contact>	xs:string	A12	The contact details for the driver
<tractor>	xs:string	A12	The tractor assigned to the trip
<trip_trailer_id>	xs:string	A12	The trailer assigned to the trip
<trip_trailer_type>	xs:string	A12	The type of the trailer
<trip_status>	xs:string	A12	Trip status - ABANDONED, ACCEPTED, COMPLETED, DELETED, EN-ROUTE, PLANNED
<trip_start_date>	xs:dateTime	XML Date/Time	The trip start date
<trip_lat>	xs:double	Signed Degrees	The Latitude for the current truck position
<trip_lon>	xs:double	Signed Degrees	The Longitude for the current truck position
<trip_ref>	xs:string	A20	The reference for the trip
<owning_depot>	xs:string	A12	The owning depot responsible for the trip
<gdp_trailer>	xs:string	A1	Y/N denoting if a GDP trailer is required
<trip_schedule>	xs:string	YYMMDD	The <i>Calidus</i> TMS schedule for the trip
<last_updated>	xs:dateTime	XML Date/Time	The date/time of the last trip update on the <i>Calidus</i> Portal system
<trip_reasons>	tns:reasons		A section containing any TRIP level reasons held on the <i>Calidus</i> Portal. See <REASON> section. Note: Not currently used for Consumer.
<stops>	tns:stops		

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

<STOP> Section

Field Name	Data Type	Format	Description
<stop_seq>	xs:int	99	
<stop_pid>	xs:string	A6	The unique Trip/Stop PID as supplied by <i>Calidus</i> TMS
<stop_type>	xs:string	A2	The stop type as supplied by <i>Calidus</i> TMS - SU,PK,DL,CL
<stop_address>	tns:address		Section containing the stop address. See <ADDRESS> section.
<planned_arr_date>	xs:dateTime	XML Date/Time	
<current_arr_date>	xs:dateTime	XML Date/Time	
<actual_arr_date>	xs:dateTime	XML Date/Time	
<planned_dep_date>	xs:dateTime	XML Date/Time	
<actual_dep_date>	xs:dateTime	XML Date/Time	
<signed_by>	xs:string	A30	



Field Name	Data Type	Format	Description
<signature>	xs:string	A20000	A Base64 encoded string containing the image of the signature
<stop_reasons>	tns:reasons		A section containing any STOP level reasons held on the <i>Calidus</i> Portal. See <REASON> section. Note: Not currently used for Consumer
<orders>	tns:orders		Section containing the orders within the stop. See <ORDER> section within the getOrder method for details.

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

<ADDRESS> Section

Field Name	Data Type	Format	Description
<address_type>	xs:string	A3	The type of the address - COL/DEL
<address_id>	xs:string	A20	The ID of the address
<name>	xs:string	A50	The name associated with the address
<line1>	xs:string	A50	The first line of the address
<line2>	xs:string	A50	The second line of the address
<line3>	xs:string	A50	The third line of the address
<line4>	xs:string	A50	The fourth line of the address
<line5>	xs:string	A50	The fifth line of the address
<post_code>	xs:string	A9	The postcode
<country_code>	xs:string	A3	The data held in the country code field of the address
<contact_name>	xs:string	A101	The contact name
<contact_number>	xs:string	A50	The contact phone number
<address_lat>	xs:double	Signed Degrees	The Latitude for the address
<address_lon>	xs:double	Signed Degrees	The Longitude for the address

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

<REASON> Section

Field Name	Data Type	Format	Description
<reason_type>	xs:string	A5	The type of the reason code
<reason_code>	xs:string	A12	The reason code
<reason_desc>	xs:string	A50	The description of the reason code
<reason_comment>	xs:string	A100	The comment included with the reason
<reason_qty>	xs:int	-99999999	The quantity associated with the reason code. Note: This field is currently only supplied on ITEM (Order Detail) level reasons.

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

18.1.4 Method: getOrder

The getOrder method can be used to retrieve order information from the *Calidus* Portal.

Request Details

Parameter	Data Type	Format	Description
<detail_level>	xs:string	A1	The detail level of the Response: <ul style="list-style-type: none"> • O - Order • D - Order Details • P - Pallet Details (if available)
<owner>	xs:string	A12	A single owner code
<so_ref>	xs:string	A20	A single system order number
<po_ref>	xs:string	A50	A single PO Reference



Parameter	Data Type	Format	Description
<book_ref>	xs:string	A50	A single Booking Reference
<tms_ref>	xs:string	A50	A single <i>Calidus</i> TMS Reference
<warehouse_id>	xs:string	A6	The warehouse id from which the order originates
<so_status>	xs:string	A3	A single Order Status e.g. ORD, ALC, MAR, LOA, DEL, CAN
<order_date_from>	xs:dateTime	XML Date/Time	The start of a date range for the ordered date against orders. If supplied, then a 'book date to' must also be supplied. The ordered date is the date the order was placed.
<order_date_to>	xs:dateTime	XML Date/Time	The end of a date range for the ordered date against orders. If supplied, then a 'book date from' must also be supplied and the 'from date' must be less than the 'to date'
<book_date_from>	xs:dateTime	XML Date/Time	The start of a date range for the booked date against orders. If supplied, then a 'book date to' must also be supplied. The search will be against the <i>latest</i> booking dates.
<book_date_to>	xs:dateTime	XML Date/Time	The end of a date range for the booked date against orders. If supplied, then a 'book date from' must also be supplied and the 'from date' must be less than the 'to date'
<conf_date_from>	xs:dateTime	XML Date/Time	The start of a date range for the conf date against orders. If supplied, then a 'conf date to' must also be supplied. The conf date is the Delivery date of the order.
<conf_date_to>	xs:dateTime	XML Date/Time	The end of a date range for the conf date against orders. If supplied, then a 'conf date from' must also be supplied and the 'from date' must be less than the 'to date'

Note: A valid request header is required.

Validation - One of the reference fields (so_ref, po_ref, tms_ref or book_ref) **or** one of the date ranges (order_date, book_date, conf_date) must be supplied. If supplied, the date ranges may be no more than 31 days.

Data Limitation - A limit of 10000 order records will be imposed. If the limit is exceeded a status of '2 - Record Limit Exceeded' will be returned with no order records.

Response Details

<ORDER> Section

Field Name	Data Type	Format	Description
<owner>	xs:string	A12	The owner code of the order
<so_ref>	xs:string	A20	The ID of the haulier assigned to the trip
<addresses>	tns:addresses		Section containing the collection <i>and</i> delivery address of the order. See <ADDRESS> section. NOTE: It is recommended that the system is configured so that if the method is getTrip then this section will be excluded as the address will be against the stop. By default, it will appear.
<so_status>	xs:string	A3	The current status code of the order
<status_desc>	xs:string	A50	The current status description of the order
<warehouse_id>	xs:string	A6	The warehouse id from which the order originates
<po_ref>	xs:string	A50	The PO ref of the order
<book_ref>	xs:string	A50	The booking ref of the order
<tms_ref>	xs:string	A50	The <i>Calidus</i> TMS ref of the order
<customer_id>	xs:string	A15	The Customer Id of the order (if supplied - currently not for Consumer)
<customer_name>	xs:string	A50	The name associated with the Customer ID
<collection_trip>	xs:string	A20	The Trip ID for the collection of the order
<collection_stop>	xs:int	99	The Stop Sequence for the collection of the order
<delivery_trip>	xs:string	A20	The Trip ID for the delivery of the order
<delivery_stop>	xs:int	99	The Stop Sequence for the delivery of the order
<book_date>	xs:dateTime	XML Date/Time	The <i>latest</i> booking date held against the order



Field Name	Data Type	Format	Description
<arrival_date>	xs:dateTime	XML Date/Time	The arrival date held against the order for the delivery stop
<departure_date>	xs:dateTime	XML Date/Time	The departure date held against the order for the delivery stop
<delivery_date>	xs:dateTime	XML Date/Time	The delivery (conf) date held against the order for the delivery stop
<delivery_user>	xs:string	A30	The delivery (conf) user held against the order for the delivery stop
<special_instructions>	xs:string	A250	Special instructions held against the order
<order_comments>	xs:string	A250	Order comments held against the order
<gdp_trailer>	xs:string	A1	Y/N denoting if a GDP trailer is required
<lift_count>	xs:decimal	99999999.99	A count of the total lifts on the order
<qty_count>	xs:int	999999999	A count of the total quantity ordered on the order
<pallet_count>	xs:int	999999999	A count of the total pallets on the order
<line_count>	xs:int	999999999	A count of the number of order detail lines
<order_reasons>	tns:reasons		A section for ORDER level reasons held on the <i>Calidus</i> Portal. See <REASON> section. Note: Not currently used for Consumer.
<order_details>	tns:order_details		A section containing the orders stock details. See <ORDER_DETAIL> section.

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

<ORDER_DETAIL> Section

Field Name	Data Type	Format	Description	Example
<item_id>	xs:string	A50	The stock code	8019008
<item_description>	xs:string	A100	The description of the stock code	VANSH 100ML NOR X50
<qty_ordered>	xs:int	999999999	The ordered quantity against the order line	123
<qty_packed>	xs:int	999999999	The picked/packed quantity against the order line	123
<qty_to_deliver>	xs:int	999999999	The to deliver (despatched) quantity against the order line	123
<qty_delivered>	xs:int	999999999	The delivered quantity against the order line	123
<item_height>	xs:decimal	999999999.9999	The item height stored against the order line	123.4567
<item_width>	xs:decimal	999999999.9999	The item width stored against the order line	123.4567
<item_length>	xs:decimal	999999999.9999	The item length stored against the order line	123.4567
<item_weight>	xs:decimal	999999999.9999	The weight stored against the order line	123.45678
<item_volume>	xs:decimal	999999999.9999	The volume stored against the order line	123.45678
<item_factor>	xs:int	999999999	The unit of sale factor stored against the order line	10
<factor_1_2>	xs:int	999999	The 'unit to case' factor	10
<factor_1_3>	xs:int	999999	The 'unit to pallet' factor	500
<factor_2_3>	xs:int	999999	The 'case to pallet' factor	50
<case_layer>	xs:int	999999	The 'case per layer' factor	10
<product_type_desc>	xs:string	A12	The description of the product type of the stock code	AMBIENT
<item_reasons>	tns:reasons		A section containing any ITEM level reasons held on the <i>Calidus</i> Portal. See <REASON> section.	
<pallet_details>	tns:pallets		A section containing pallet details for the stock code, if available on the <i>Calidus</i> Portal. See <PALLET_DETAIL> section.	

Note: Fields will only be sent on the response if they have been populated within the *Calidus* Portal.

<PALLET_DETAIL> Section

Field Name	Data Type	Format	Description
<order_line_no>	xs:int	999	



Field Name	Data Type	Format	Description
<pick_location>	xs:string	A20	
<pick_pallet_id>	xs:int	99999999	
<rotation_no>	xs:string	A30	
<cust_rotation_no>	xs:string	A30	
<cust_pallet_id>	xs:string	A30	
<sell_by_date>	xs:dateTime	XML Date/Time	
<manufacture_date>	xs:dateTime	XML Date/Time	
<qty_to_deliver>	xs:int	999999999	
<qty_despatched>	xs:int	999999999	
<picker>	xs:string	A4	
<checker>	xs:string	A4	
<pick_date>	xs:dateTime	XML Date/Time	
<picking_reason_code>	xs:string	A4	
<despatch_date>	xs:dateTime	XML Date/Time	
<despatch_user>	xs:string	A4	
<despatch_reason_code>	xs:string	A4	

Note: Fields will only be sent on the response if they have been populated within the *Calidus Portal*.

18.1.5 Response Codes

Code	Message
0	OK
1	Invalid or Missing Credentials
2	Record Limit Exceeded
3	Invalid Parameters
999	webService Error



19 Category:Calidus Portal CORE

This page shows all modules that are delivered as part of core Portal. This apply to all modules: TTM, WMS, TMS.

