

Owner Maintenance - TTM

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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.

Owner Creation

Owner Description Create

Owner Selection

OBS : OBS Owner

The options for the selected owner will then be displayed.

Options

Owner Customer Visibility

Description

OBS OWNER

Owner Options

Start Of Week: Monday

Qty Check: Ordered->Delivered

Set Cancelled: Green

Set Clasured: Green

CRM Email Option: None

CRM Email To:

Email Notifications: Enabled: 1 of 28 Events

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 Clasured Defines the RAG status for Clasured 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 ▼
VLI	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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Customer Visibility Options:

Customer Visibility Config

Default Data Refresh:

Default Page Refresh:

Show Orders For:

Show Arrived For:

Keep Delayed For:

Show Delivered:

- █ Delivered (Clean):
- █ Part Delivered:
- █ Failed Delivery:
- █ Cancelled:

Delivery Window:

- █ Before:
- █ After:

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

