

# 1. Client orders

- Order registration
- Delivery via Terminal
- Multiple Pickup or Delivery Addresses - Multibooking
- Current Orders

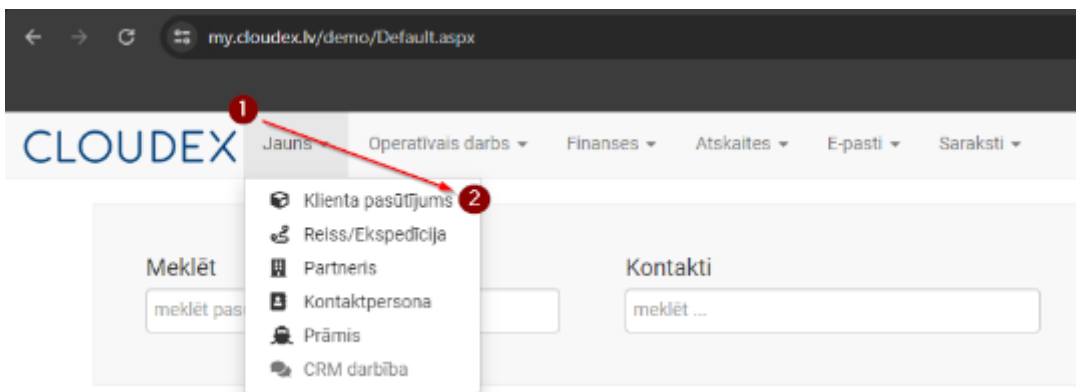
# Order registration

1. Registering a new customer order
  2. New order window
  3. Adding a new customer
  4. Filling in a new customer card with VAT number
- 

## 1. Registering a New Customer Order

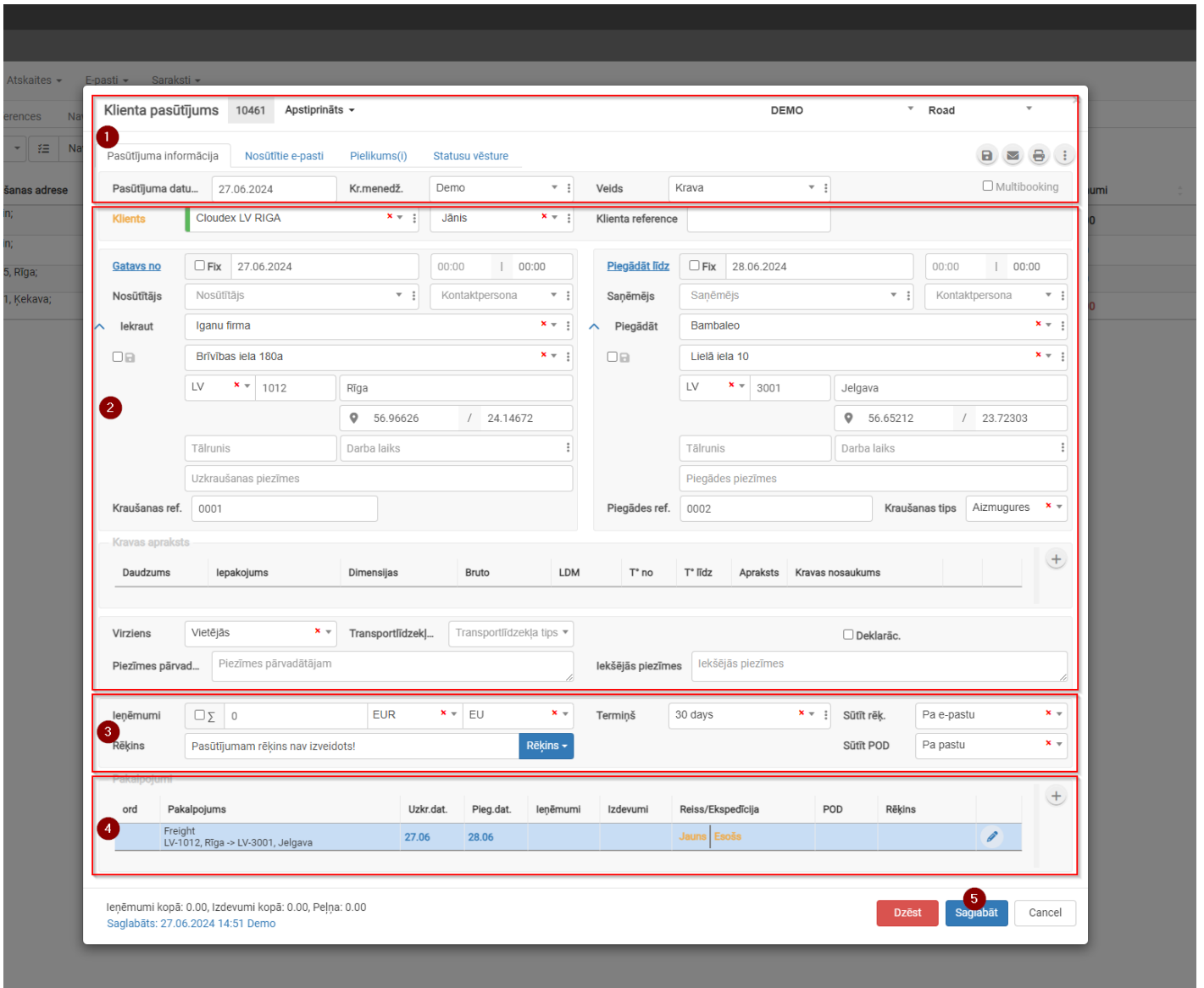
1. Click "**New**" in the top navigation bar.
2. From the additional functions, select "**Customer Order**".

Required sequence: **New** → **Customer Order**. A window will open where you need to enter the order information accordingly.



## 2. New Order Window

1. Customer order description
2. Customer order basic information
3. Revenue section
4. Services / Tasks
5. Save




### 3. Adding a New Customer

1. Click the three dots to open additional options.
2. Click "New" to open the "New Customer" card.



# 4. Filling in a New Customer Card with VAT Number

1. Paste the VAT number.
2. Click the button  to automatically fill in the fields.

Reference link: <https://doc.ozols.lv/link/321#bkmrk--3>

### Jauns partneris ×

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Pamatdati Norēķini Citi dati Paziņojumu iestatījumi Pielikums(i) Statistika

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Nosaukums	<input type="text" value="Ozols Grupa"/>	Uzņēmuma veids	<input type="text"/>
Kods	<input type="text" value="Ozols Grupa"/>	Valoda	<input type="text" value="Latvian"/>
Reģ Nr.	<input type="text" value="40103345463"/>	PVN kods	<input type="text" value="LV40103345463"/>
Klienta statuss	<input type="text" value="Neitrāls"/>	Statusa info	<input type="text" value="Statusa info"/>
Pārvadātāja statuss	<input type="text" value="Neitrāls"/>	E-pasts rēķiniem	<input type="text" value="Rēķina e-pasts"/>
Rēķina nosūtīt	<input type="text" value="Pa e-pastu"/>	Nosūtīt POD	<input type="text" value="Pa e-pastu"/>
Piezīmes	<input type="text" value="Piezīmes"/>		

Vārds	Epasts	GSM	Tālrunis	Skype	Amats	Piezīmes	+
-							

Adrese	Kontaktpersona	Darba laiks	Piezīmes	+
-				

Dzēst Saglabāt Atcelt

# Delivery via Terminal

1. Delivery via Terminal
2. Delivery via Terminal Options
3. Services view after adding "Delivery via Terminal"

## 1. Delivery via Terminal

Customer Order → Services → + → Delivery via Terminal

The screenshot displays a software interface for managing customer orders. At the top, there are navigation tabs: "Klienta pasūtījums", "Klienta pasūtījuma", "Klienta pasūtījuma", and "Klienta pasūtījuma". Below these, there are several form fields for order details, including "Pasūtītāja nosaukums", "Adrese", "Pakalpojums", and "Termins".

The main part of the interface is a table titled "Pakalpojumi" (Services). The table has the following columns: "ord", "Pakalpojums", "Uzkr.dat.", "Pieg.dat.", "Ieņēmumi", "Izdevumi", "Fakt.izd.", "Reiss/Ekspedīcija", "POD", "Rēķins", "Neto", "Trenz. maks.", and "N". The table contains one row with the following data: "EE-11312, Tallinn -> PL-02-158, Warszawa", "28.01", "31.01", "", "", "", "Jauns", "Esošs", "O", "Jauns".

A dropdown menu is open over the "+" icon in the "Neto" column of the table. The menu items are: "Pamatpakalpojumu", "Piegāde caur terminālu", "Papildus pakalpojums", "Papildus kravu-1", "Papildus kravu-2", "Pievienot\Labot THC", "Pievienot degvielas piemaksu", "Pievienot mobilitātes pakas piemaksu", and "Pievienot konteineru piepildīšanas vietu". The "Piegāde caur terminālu" option is highlighted with a red box and a "2" in a red circle. A "1" in a red circle points to the "+" icon.

## 2. Delivery via Terminal Options

1. Select the required terminal; the address will be filled in automatically.
2. Split the route **EE11312 Tallinn → PL-02-158** into two parts.
3. Planned delivery deadline to the terminal.
4. Specify the amount allocated for the stage from the terminal to the delivery address.
5. If you know which truck will transport the cargo, you can create a new trip or add it to an existing trip.
6. Assign it to the department responsible for delivery from the terminal to the delivery address.

**Piegāde caur terminālu** ×

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**Info** Pasūtījums nr. 10580; Klients DHL Express Latvia  
Uzkraušanas adrese: Tallinn, 11312, EEPiegādes adrese: Warszawa, 02-158, PL

**Termināls** 1 Cdex terminal SIA x Terminal street 11; Riga; 2131; x

Piegāde no uzkraušanas adreses līdz terminālim  Piegāde no termināla līdz piegādes adresei 2

**Jaunais maršruts** Cdex terminal SIA\* -> PL-02-158, Warszawa (4.40 LDM)

**Plānots piegādāt** 3 Plānots piegādāt terminē **Ieņēmumi** 4 0

**Piegādes izmaksas** 0 EUR x **PVN** EU x

**Reiss/Ekspedīcija** 5 Reiss/Ekspedīcija trip info

**Nodaļa\*** 6 Nodaļa

Saglabāt Atcelt

## 3. Services View After Adding "Delivery via Terminal"

The overall delivery process is divided into two stages, and each stage is assigned a specific amount:



1. Total amount to be received from the customer.
2. Revenue distributed among departments.

### 3. Departments responsible for specific delivery stages.

leņēmumi	<input type="checkbox"/> 200	EUR	x	EU	x	Termiņš	30 days	x	Sūtīt rēķ.	Pa e-pastu (rēķins kopā...)			
Rēķins	Pasūtījumam rēķins nav izveidots!		Rēķins										
Pakalpojumi													
ord	Pakalpojums	Uzkr.dat.	Prog.dat.	leņēmumi	Izdevumi	Fakt.izd.	Reiss/Ekspedīcija	POD	Rēķins		Nodaja	Transp. men.	N
	EE-11312, Tallinn -> LV-*Cdex terminal SIA	28.01	29.01 -2	100.00			Jauns Esošs	○	Jauns	Esošs	NORTH		
1	(-) LV-*Cdex terminal SIA -> PL-02-158, Wars...	29.01 +1	31.01	100.00			Jauns Esošs	○	Jauns	Esošs	BALTICS		

# Multiple Pickup or Delivery Addresses – Multibooking

**Multibooking** is used when a single customer order includes multiple pickup or delivery addresses.

- Check the box  for **Multibooking**.
- Click  to add additional **pickup addresses**.
- Click  to add additional **delivery addresses**.
- The order number will be assigned a **sub-number**. Clicking *image-1720785321487.png* allows you to switch between multibooking orders.
- Reference link: <https://doc.ozols.lv/link/348#bkmrk->

Pasūtījuma informācija Nosūtītie e-pasti Pielikums(i) Statusu vēsture

Pasūtījuma datu... 25.06.2024 Kr.menedž. Demo Veids Krava  Multibooking

Klients Uzņēmums 3 Austris Plaģis Klienta reference 987654321 References Nr.

**Gatavs no**  Fix 01.07.2024 00:00 | 00:00

**Nosūtītājs** Firma Z Kontaktpersona

**lekraut** Firma Z

Lielzemes iela 10

LV 1007 Rīga 56.95928 / 24.05471

Tālrūnis Darba laiks

Uzkraušanas piezīmes

Kraušanas ref.

**Piegādāt līdz**  Fix 05.07.2024 00:00 | 00:00

**Saņēmējs** Saņēmējs Kontaktpersona

**Piegādāt** GGP Logistics

Charitéplatz 1

D 10117 Berlin 52.52364 / 13.37821

Tālrūnis Darba laiks

Piegādes piezīmes

Piegādes ref. Kraušanas tips Kraušanas tips

Kravas apraksts

Daudzums	Iepakojums	Dimensijas	Bruto	LDM	T* no	T* līdz	Apraksts	Kravas nosaukums
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Virziens Eksports Transportlīdzekļ... Transportlīdzekļa tips  Deklarāc.

Piezīmes pārvad... Piezīmes pārvadātājam Iekšējās piezīmes Iekšējās piezīmes

Ieņēmumi  0 EUR 21%

Termiņš 30 days Sūtīt rēķ. Pa pastu

Rēķins Pasūtījumam rēķins nav izveidots! Rēķins Sūtīt POD Pa pastu

Pakalpojumi

ord	Pakalpojums	Uzkr.dat.	Pieg.dat.	Ieņēmumi	Izdevumi	Reiss/Ekspedīcija	POD	Rēķins
	Freight LV-1007, Rīga -> D-10117, Berlin	01.07	05.07			TS136:BAU-HOW AA123/B123		

# Current Orders

1. Customer Order Classification
  2. Current Order Statuses
  3. Additional Options Without Opening the Order
- 

## 1. Customer Order Classification

From the menu, open:

**Operational Work > Customer Orders**

Customer orders are divided into 2 groups:

1. **Current Orders** – this list displays all orders that are in progress (with various statuses).  
Orders remain in this section until the invoice has been sent.
2. **All Orders** – this section also includes completed orders.

CLOUDEX Jauns - Operatīvais darbs - Finances - Atskaites - E-pasti - Saraksti - Meklēt...

Aktuālie pasūtījumi 1 Nav iekrauts - Klientu pasūtījumi 2

Nr.	Reiss/Ekspedīcija	Terminālis	Piegādes adrese	Kravas apraksts	POD	Klients	Ieņēmumi	Izdevumi	Peļņa	Kravas mēdzēris
10451	A129;Demo G123/MZ522	LV-2015, Jūrmala; 19.03	LV-2164, Ādaži; 27.06	D-90475, Nūm... t* -10*/-4*	B	Zieds	0.00	0	0	J.V
10454	W94;EKG Cargo EA789/E777	LV-3018, Ozolnieki; 11.11	N-0107, Oslo; 21.03	3PLL; 0.20LDM; 100 Kg;	B	Starpsiena #17	290.61	0	290.61	J.V
11; 17 085	LV-2015, Jūrmala; 19.03	Jauns	Esošs	LV-1011, Rīga; 18.08	8EPLL+2EPLL+2EPLL; ADR t* -5*/0*	MCC #A-78312	1080.00	5.54	1074.46	J.V
1094/4 A-78312	LV-3018, Ozolnieki; 11.11	Jauns	Esošs	LV-3018, Iecēni; 12.11	1EPLL+5Box+2; 0.40LDM; t* -5*/0*	MCC #15555	0.00	5.68	-5.68	J.V
10045 15555	LV-3018, Ozolnieki; 03.11	Jauns	Esošs	LV-3018, Ozoln... 03.11	B	MCC	0.00	0	0	J.V
10046	LV-1005, Rīga; 28.07	Jauns	Esošs	LV-1083, Rīga; 01.08	B	Antena7* #81311111	30.00	0	30	J.V
10131 81311111	LV-1029, Rīga; 03.10	Jauns	Esošs	LV-1083, Rīga; 19.10	B	Auto Servis Opti...	100.00	600	-500	Demo
10219	LV-2150, Sigulda, ... 18.10	Jauns	Esošs	LV-3434, Priek... 13.07	B	A Logistics	600.00	0	600	Demo
10220	LV-3030, Ogre; 13.07	Jauns	Esošs	LV-3434, Priek... 13.07	B	Demo #132131abc	0.00	10.58	-10.58	J.V
10242 132131abc	LV-3018, Ozolnieki; 04.07 -1	Jauns	Esošs	LV-3701, Dobel... 18.07	B	Zieds #HJ9889	600.00	0	600	Demo
10246 HJ9889	LV-3456, Alzpute; 17.07	Jauns	Esošs	LV-3701, Dobel... 18.07	B	Akvadukts #AK9975	11.00	137.57	-126.57	Demo
10252 AK9975	LV-3456, Alzpute; 21.07 -3	Jauns	Esošs	LV-3201, Talsi; 21.07 -4	B	THE COCOON G... #CO-272	1000.00	700	300	Demo
10254 CO-272	LV-3018, Ozolnieki; 05.07	Jauns	Esošs	a; 26.07	B	MCC #2132132121	0.00	0	0	J.V
10255 2132132121	LV-1073, Rīga; 27.07	Jauns	Esošs	LV-1013, Rīga; 27.07 -1	B	THE COCOON G... #CO0003	1422.87	83.45	1339.42	Demo
10258 CO0003	LV-3018, Ozolnieki; 15.02 +27	Jauns	Esošs	LV jalgava; 27.05 +128	B	MCC #123TEST	0.00	0	0	J.V
10289 123TEST	LV-2111, Kekava; 24.06	Jauns	Esošs	D-50858, Köln; 01.07	B	7 WAYS LOGISTI...	1000.00	0	1000	Demo
10292	LV-2164, Ādaži; 11.06 -1	Jauns	Esošs	S-147 33, Tum... t* -10*/-4*	B	Starpsiena #CLR56	2103.00	0	2103	Demo
10293 CLR56	LV-3018, Ozolnieki; 09.03	Jauns	Esošs	LV-1015, Rīga; 14.03	B	Akvadukts #TR685673	52.00	0	52	Demo
10294 TR685673										

Ieņēmumi: 59 762.98 EUR  
Izdevumi: 28 358.76 EUR, Peļņa: 31 404.22 EUR

27 - Apstiprināts 1 - Problēmas 2 - Saplīnots 4 - 1 - Uzskats 70 - Piegādāta 16 - Rīšins sagatavots

Iepriekšējais Nakamais

## 2. Current Order Statuses

- **New** - status assigned when the customer adds a new shipment through the customer portal.
- **Confirmed** - the manager confirms the shipment added by the customer, or the manager creates a new shipment manually.
- **Planned** - when the shipment is assigned to a trip/route.
- **Loaded** - when the shipment has been loaded.
- **Delivered** - when delivery of the shipment is confirmed.
- **Invoice Prepared** - after delivery, the invoice is prepared and issued.
- **Issues** - this status appears when something does not go as planned. It is highlighted in red to draw the manager's attention.

### 2.1. Next Order Status

1. The "border" of the order status may be highlighted in blue, green, orange, or red, indicating the status of the next required action.

- A shipment status summary is available below the table. Hovering the mouse cursor over the number of each color displays an explanation, for example: "Delayed shipment delivery".

**Krava jāiekrauj 2 dienu laikā** GISTI... S-121 49, Joha... 5PLL+2PLI

4 3 1 Apstiprināts 2 1 1 Saplānots 20 19 Piegādāts 25 23 2 2 Rēķins sagatavots

Under the **"Status"** column, when hovering over the current shipment status with the mouse cursor, the system displays the next sequential action that needs to be performed.

CLOUDEX Jauns Operatīvais darbs Finances Atskaites E-pasti Saraksti Meklēt. Jānis

Aktuālie pasūtījumi 51 Nav iekrauts / nav piegādāts Nav kraušanas references Nav iekraušanas info e-pasta Visi pasūtījumi Atrast pārvadātāju

Piegādes laikā Meklēt Veidre Janis Atlasīts viss (8)

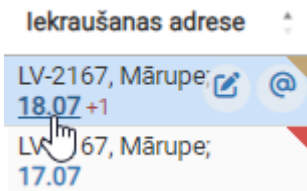
Nr.	Statuss	Iekraušanas adrese	Reiss/Ekspedīcija	Terminālis	Piegādes adrese	Kravas apraksts	POD	Klients	Ieņēmumi
10100	Rēķins sagatavots	21.12	EA1122/E777		30.12				500.00
10092	Rēķins sagatavots	LV-3030, Jelgava; 09.12	TS108;EKG Carrier		LV Daugavpils; 11.12	2PLL;		LVAGROO	293.00
10069	Rēķins sagatavots	LV-2131, Rīga; 04.12	TS245;abc AA1111		uuu, sss; 05.12	1EPLL; 0.40LDM; t* 0*;		MCC	0.00
1044/3 a	Rēķins sagatavots	LV-3018, Ozolnieki; 20.11	TW227;7 WAYS LOGISTI... HJ8111		LV-3018, Iecēni; 23.11	3EPLL; 1.20LDM;		MCC #a	0.00
1044/2 a	Rēķins sagatavots	LV-3018, Ozolnieki; 20.11	TW227;7 WAYS LOGISTI... HJ8111		LV-3018, Iecēni; 10.12			MCC #a	0.00
1044/1 a	Rēķins sagatavots	LV jelgava; 21.12 +389	TW227;7 WAYS LOGISTI... HJ8111		LV rīga; 21.12 +386			MCC #a	0.00
10042 a	Rēķins sagatavots	LV-3018, Iecēni; 10.11	TW19;Demo KJ222/RR 1234		LV-3018, Iecēni; 11.11			MCC #a	0.00
1104 bbbbaa	Rēķins sagatavots	LV-1024, Rīga; 10.09	TS23;CCL Service AF 789		LV-3018, Ozoln... 24.09	1EPLL; 100 Kg;		MCC #bbbaa	10.00
1101	Rēķins sagatavots	LV-3018, Ozolnieki; 28.08	TS22;DHL KOLN RBK473		RU-1024, Rīga; 24EPLL; 9.60LD... FIX 29.08	t* -8*-12*;		MCC	50.00

Ieņēmumi: 30 205.96 EUR Izdevumi: 13 605.74 EUR; Peļņa: 16 600.22 EUR

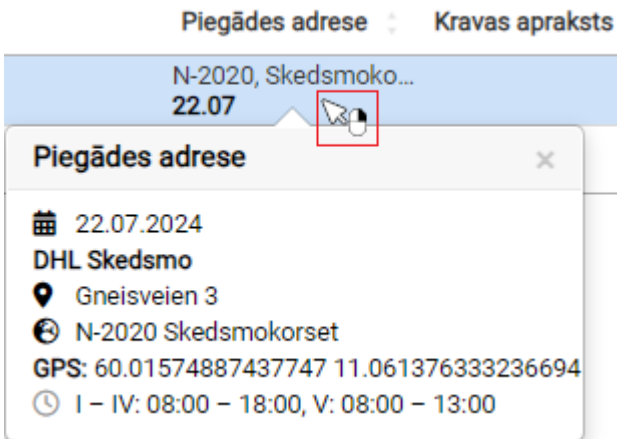
5 Apstiprināts 1 Saplānots 1 Uzkrauts 27 27 Piegādāts 17 16 1 Rēķins sagatavots Iepriekšējais Nākamais

### 3. Additional Options Without Opening the Order

- If the loading date is displayed in blue, it means the shipment has not yet been loaded. Clicking the date opens a window where you can change the planned loading date.



- If, when hovering over information in a column, you see the icon, then right-clicking will display additional information. This option is available in several columns, such as:



- Loading Address
  - Delivery Address
  - Customer
  - Shipment Description
  - etc.
- In the **POD\*** column, it is possible to add delivery confirmation documents for the order.
  - If a document icon with a red corner appears in the column, it means POD documents need to be added.

\* **POD - Proof Of Delivery** (CMR; B/L; AWB; SMGS)

The invoice issuing description is available here:

[OZOLS documentation](#)

Outgoing invoices can also be opened through the current orders list, for example, to quickly enter the sending date.

Klients	Ieņēmumi	Izdevumi
MCC #123TEST	0.00	Izejošais rēķins
MCC #544321	50.00	
Starpsiena	2103.00	0