1) Registration of Client order

- New client order
- Multiple loading or delivery addresses - Multibooking
- Additional Services to main order
- Delivery via TERMINAL
- How to delete a Client order?
- Exchanging the cargo information in OZOLS TMS

New client order

The client order page "Cargo" is divided into 6 information zones

1. **Basic Order information**

    1.1. **Client and Cargo manager**

    1.2. **Multiple loading or delivery addresses - Multibooking**

2. **Entering Loading and Delivery Addresses and Information**

    2.1. **Searching the loading or delivery address**

3. **Income from the client**

4. **Cargo description**

5. **Description of services related to the cargo**

6. **Adding cargo to a new or existing Trip / Expedition**

1. Basic order information - main principles:

1. A new **Client order** opens: **OZOLS > Menu> Window> New Client order (or key F6).**
2. Enter the required information in the fields. Fields with **Blue** descriptions are **required.**
3. **Double-clicking on empty fields** opens the information entry window or press the command button ⋮ next to the field.

1.1. Client and Cargo Manager

Cargo Manager: The person responsible for this order.

Client: The Client (or partner) who orders the delivery of the cargo.
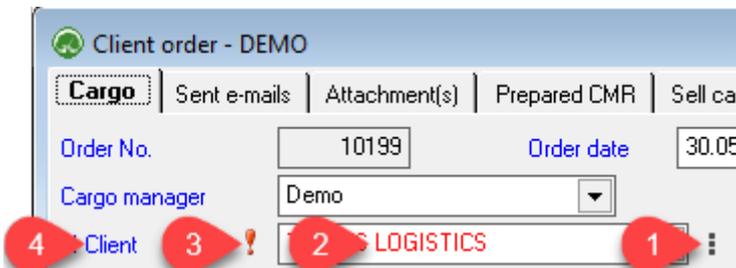
1. **To add or find a Client,** click the command button ⋮ next to the field.

2. When one of the existing Clients is selected, **the color of the name** changes depending on the client's status (according to the traffic light principle - green, yellow, red).

3. **!** The exclamation mark appears if there are remarks on the Client's card.

4. The " **Client** " field changes color, like a traffic light, depending on the payment status of the invoices of a particular client

> The function key **F3** opens the Client / **Partner information card** , with information about cooperation with this partner

> **Client order number.** If you have received an order from a partner who uses OZOLS TMS, after entering the partner's company name and order number, you will have option to import the information for this order.

Contact info: The client's contact person who places the cargo order. If this data is entered

correctly, it will be convenient both to re-add it to orders and, for example, to send e-mails (cargo status, invoice, payment reminder).

1.2. Multiple loading or delivery addresses - Multibooking

Multibooking is used when there are several loading or delivery addresses in one client order.

2. Loading and Delivery Address and information

Agreed to load or deliver: Enter the date and time when the load is to be loaded or delivered:
- **FIX** mark if the exact time is specified.

- If you need to specify the time interval **from which the** cargo must be loaded or delivered, click on the text "**Agreed to load**" or "**Agreed to deliver**". A window will open in which you can enter the scheduled date **from** (1) and enter the date **until** (2) in the date field.
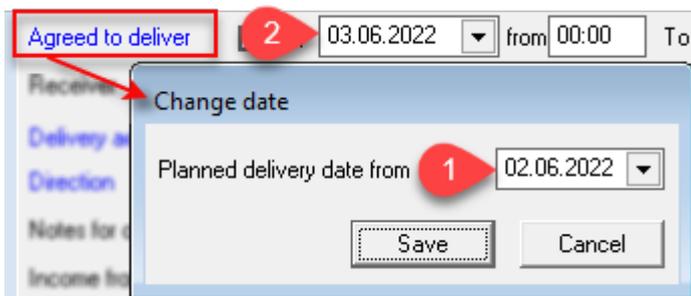
Sender and Receiver:
- To add or find pres command button ⋮ next to the field.
- A double-click in an empty field opens a new client (partner) input window.

Loading address: Enter a new address or choose from database.

2.1. Searching the loading or delivery address 🔍
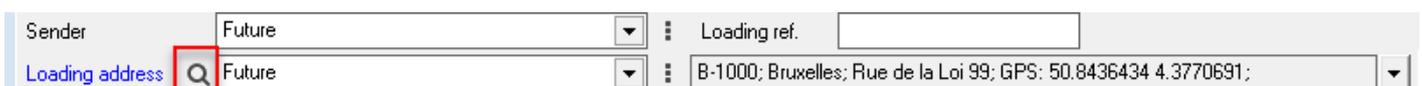
The Address Search window is used to quickly find and add a new or update an existing address in the database.

1. Address search field :

- In this field you can freely enter or paste the information you have.

- In this window entered information can be sorted and edited.

2. Addresses found :

- The program searches for the Company address in the internal database and Google maps.

3. Selected address :

- If one of the Found addresses is selected, the fields in this section will be filled in automatically.

- If the program does not find the desired address, enter it manually.

- If you enter a new Company and Address, it will be saved and you will not need to enter it again next time.

- Double click on Company name will open "Partner card"

- In the "Latitude" and "Longitude" fields, the program automatically imports GPS coordinates from Google maps. - You can check the address in Google maps by pressing 📍

The address must be entered accurately and in the corresponding fields!

Direction, Trailer Type, Loading Type - This information will be important when planning Trip / Expedition.

Notes for carrier: Additional cargo-related information:

- These notes are defined as templates for quick use.

- Press 🔍 to create a new template.

Internal Notes: Cargo-related notes that are not disclosed outside your company:

- These notes are defined as templates for quick use.

- Press 🔍 to create a new template.

3. Income from the client:
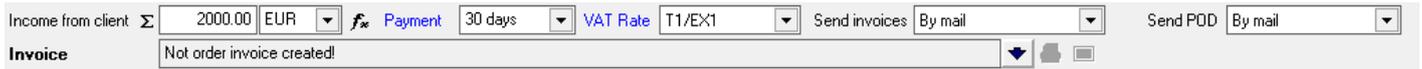
- Enter the total amount of revenue **without VAT** and the currency to be paid to the customer.
- **If changes occur during the processing of the order,** e.g. an additional customs declaration is purchased, the value of the "Revenue from customer" field **must be manually updated.**
- If a **Credit Invoice** has been issued to the customer, the amount of the '**Revenue from customer' must be manually reduced** by the amount of the Credit Invoice.

Aggregation Σ
- If pressed, the field " **Revenue from the client"** will be filled in automatically by summing the amount entered in the services.
- If this feature is enabled, it is not possible to manually change the value **of the 'Client Revenue ' field.**

Payment: Outgoing invoice payment term in days.
- The customer's default payment term can be defined: Partner / Customer> Other data page> Payment term

VAT rate:
- Selecting the VAT rate and then pointing with mouse on the field shows the VAT rate Article.
- VAT rates can be changed in the list: General lists> Tax list

4. Cargo description

A single customer order may include several different items. In this case, the items are entered on separate lines. As a result, the number of different items in the order is the number of lines in the Shipment Description.

To add a cargo description click **Add1**

The list of packaging types can be changed (EPLL, BOX, etc.) according to the needs of the order by clicking ⋮ and selecting **Add new** defined packaging type and its dimensions.

Package size: The dimensions of the package must be given in meters. For defined packages such as EPLL, the default dimensions can be entered in the description of the package type, then when the package type is selected the package size fields will automatically fill in.

Stackable: If pallets can be stacked on top of each other, mark how many pallets can be stacked on top of each other. This information will also be reflected in the order to the carrier. It will also be taken into account when automatically calculating the load space ldm.

Cargo name: Contents of packaging. These titles are predefined by pressing 🔍

Bruto weight, kg : If available, specify the bruto weight of the cargo in kg.

Place taken, ldm: For standard packages, the default ldm value can be specified in the Package

size classifier. In this case, the field will be filled in automatically when selecting the quantity and type of packages. Also, the program will take into account the value of the Stackable packages and will reduce the ldm value.

Volume, m3 : When entering the package dimensions, the volume field is calculated automatically.

CHW, kg: Chargeable Weight is used to calculate your income and expenses. The software automatically calculates and selects the larger weight by comparing the gross weight and the volumetric weight. The gross weight of a load is the actual weight, while the volumetric weight is the dimensional weight, where 1ldm = 1850kg and 1m3 = 300kg).

Stat.No .: "Statistical number" is displayed in CMR column 10 if you are printing from a OZOLS TMS.

Temperature from... to: Temperature range required by the client during delivery.

ADR : check if a dangerous goods permit is required.

Save and New: You can save time and choose this command button if you need to enter several cargo items in one order.

> Depending on the configuration, if there are several loads in one car/trip, but there are total expenses for the whole trip, the expenses will be divided among the customer's orders in proportion to the entered Chargeable Weight!

5. Description of services

> This section of the order automatically generates the main service description from the information entered above.

#	Service	Income	Trip/Exp.no.	Transport No.	Load.date	Delivery.d.	Invoice No.	Expence	POD	Carrier		Add2
-1	- SE, Vasteras -> S-6*DEMO terminal	70.00			12.04.2022*	13.04.2022*		70.00	x		▲	Open
0	S-6*DEMO terminal -> FI, Muurla	1380.00			13.04.2022*	20.04.2022*		1000.00	x			
10	- muita	50.00	-						x			Delete

The main service number is "0" and this number is not displayed. All additional services are numbered. For example:

- Delivery from loading address to terminal (pick up) # -1
- Main Trip / Spedition # 0
- Delivery from terminal to unloading address (domestic) # 1
- Additional services (eg customs) # 10

> **Additional services:** If additional services are provided as part of the client's order, e.g. Terminal Delivery, Cargo Insurance, Handling Services, Export Declaration, Customs Services, Downtime, Warehousing, etc.

> Additional services are added by clicking the **Add2** command button

Travel / Expedition. no: for more information read: Selecting the trip / forwarding number.

Order in the trip: this will be the order if there are several services to be provided in one trip/spedition/order.

Service: You must select a service from the classifier that will appear on the invoice. For more information on selecting a value, see Working with drop-down lists. When adding a new service, it must be translated into the languages in which the invoice is issued, see the section on translation:

Service Notes: Additional text to be included in the outgoing invoice

Service period from... to: The service period is displayed on the invoice printout

Include the service in the outgoing invoice: If you want the provided service to be included in the customer's invoice, then you must fill in the fields for the outgoing invoice

Apply the revenue and expenses of the service to the main freight forwarding: By default, the revenue and expenses specified in the service are attributed to the Voyage Forwarding in which the service is placed. If the revenue and expenses need to be attributed to the main flight / forwarding of the Customer's order (marked with No. 0), then this "ckeckbox" must be ticked

Incoming Invoice: You must fill in the planned spend fields.

6. Once the order has been entered, it must be added to the Trip / Expedition that will deliver it!

Multiple loading or delivery addresses - Multibooking

Multibooking is used when there are several loading or delivery addresses in one client order.

1. Check Multibooking ☑ ;
2. Click 🔵 to add additional **loading addresses** ;
3. Click 🔵 to add additional **unloading addresses** ;
4. The order number is assigned a sub-number. You can switch between multibooking orders by pressing ▼.

The following **must be done for each Multibooking cargo** separately:

1. **Description of the Cargo**

2. Added to existing or new **Trip/Spedition**

3. If Multibooking order is fulfilled by **several carriers**, the **income** from the customer must be **specified** for each shipment.

4. Once the Multibooking order has been entered, **every part of it must be added to the Trip / Expedition** that will deliver it!

Additional Services to main order

Additional Services - services provided as part of the main client order, for example:

- Cargo **insurance** ,

- **Transshipment** services,

- Export **declaration** ,

- **Customs** services,

- **Downtime** ,

- Storage in **warehouse** , etc.

> Additional services are added in the lower part of the Client's order window on the right side by pressing the command button **Add2** and choose **Additional service**

In addition, there are 2 information areas in the service window:

1) Information for the Service **recipient** ;

2) Information to **the service provider,** such as the carrier.

Customer Order: Summary of customer order information.

Sequence in order: Additional service sequence number from 10 upwards. Learn more here .

1) Information for the recipient of the service

Type of service: You must select a service from the classifier, which will be visible on the invoice. When adding a new service, it must be translated into the languages in which the invoice is issued, for translation see the point: Translation of records.

Explanation of the service in the invoice: Additional text that must be included in the outgoing invoice

Service period from ... to ... : filled in if the Service is displayed in the invoice printout

Include the service in the outgoing invoice: mark☑if the service should be included in the customer's invoice.

Allocate service revenues and expenses to the main shipment of the cargo: Check here☑ , if the service will be applied to the main voyage/expedition of the Customer's order. After the default, the service's revenues and expenses are attributed to the separately created Trip / Expedition.

Price to the customer; The amount; Revenue; VAT rate: filled in according to the amount of additional service

2) Information for the service provider

Trip/ spedition no.: Voyage/ Expedition number to which the service is applicable. If not known, do not fill in.

Sequence in Trip: The sequence of service on the Trip.

Carrier: If unknown, do not fill in.

Carrier manager: If not known, do not fill in.

There will be no incoming bill: if there will be no bill for the additional service.

Record expenses/carrier price: if checked, the carrier who also works in the OZOLS TMS system, when entering **the order reference** , will see the agreed price.

Price to the carrier: The price for which the Carrier has agreed to deliver the cargo.

Quantity: The amount of additional service.

Costs and VAT rate: Additional service costs.

Delivery via TERMINAL

1) How to create Terminal

The Cooperation Partner who provides terminal/warehouse services must have the **"Terminal" mark** in the Partner's card.

OZOLS > Contacts > Lists > All partners > Partner card

1. In the partner card
2. Open Other data
3. Mark the group "Terminal"

2) Delivery via terminal

1. Open the **Client's order**, which must be sent through the terminal

2. In the list of services, select the command button Add2 **(** 1) > **Delivery through the terminal** (2)

The numbers of the Services included in the order

1) **The number of the main Trip/spedition, is " 0 " and is not shown (Its field is empty)** ;

2) Additional **transportation before the main** trip is with **minus** sign;

3. **Choose** at which part of delivery the terminal will be used:

   A. Delivery from the loading address **to the terminal** (1)

   B. Delivery from the terminal **to the delivery address** (2)

4. For the terminal:

   - **Terminal:** Name and address;

   - **Planned delivery to the terminal:** Date, time;

   - **Revenue** : the amount that is diverted from the main trip revenue to this local trip.

   - **Local delivery expenses:** If the expenses are not yet known, then this amount can be

entered later.

5. **Trip/sped. no.:** If possible, add the Cargo to a new or existing local Trip/Expedition.here .

How to delete a Client order?

Before deleting the Client order, make sure that it would not be more correct to change the order status to - **Cancelled**.

Read more about changing the order status <u>here</u> .

1. Open the Client order you want to delete.
2. Press Delete and select **Delete Client Order No ...**
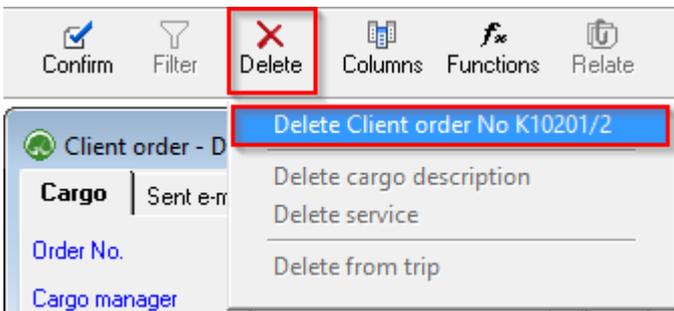
If **an invoice has already been created** for the Client order, program will not allow the order to be deleted!

To delete the order with invoice:

1. **Open the prepared invoice,**
2. **Cancel the confirmation of invoice**
3. **Delete the Invoice**.
4. Now it is possible to **delete a customer's order.**

Exchanging the cargo information in OZOLS TMS

Companies that use OZOLS TMS can exchange order information automatically using reference number.

1) Sending cargo information to partner

1. Press **Mail** or **Print**
2. Choose – **Order for carrier**
3. The system will prepare e-mail, with attached CARGO TRANSPORTATION ORDER – AGREEMENT

4. The **number** of CARGO TRANSPORTATION ORDER – AGREEMENT **is the cargo reference number**

Number of this agreement is the **reference number for the cargo information**

2) Receiving of cargo information from partner

1. When creating **new client order**,
2. Enter the name of the **Client**,
3. Enter the number of Cargo Transport order - agreement = **Client order No**
4. OZOLS TMS will offer you to fill the information from Partner automatically.

ATTENTION! Some OZOLS TMS user companies have disabled this option.

3) To check the status of Cargo information exchange:

	Delete	Columns	**Functions** ②	Relate	Print	Mail	Multiselect	View	Book	🔔	Favorites	Exit	

① Client order - DE

📋 Copy Client order
Create CMR

📍 Show cargo route on map
Open cargo track & trace page

Send SMS to driver with loadi...
Send SMS to driver with deliv...
Send SMS to driver with loadi...

Put loading info on "Clipboa...
Put delivery info on "Clipboa...
Put loading and delivery info...

Additional fields
③ **Order export status**
PLL exchange report
Open client gift cards

No.				address	Cargo manager	Income	Expenses	Profit	ept of Invoic

Cargo | Sent e-m...

Order No.
Cargo manager
Client
Agreed to load
Sender
Loading address 🔍
Agreed to delive
Receiver

④ **Cargo import/export status**   🗕 🗖 ✖

1.	Order exported to HUB	16.08.2022 12:17
2.	Demo company order No.	A3970
3.	*Cargo company SIA has not imported an order from HUB*	