

1) Registration of Client order

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New client order

A quick way to open new **Client order** is by pressing the **Function key F6** on keyboard

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**

Client order - DEMO

Cargo | Sent e-mails | Attachment(s) | Prepared CMR | Sell cargo | Status history | Copy Order | SMS | CMR | Publish

Order No. 10199 Order date 30.05.2022 Order type Cargo ☐ Multibooking

Cargo manager Demo Client order No.

Client Company1 Contact Info Frederiks

Agreed to load ☒ FIX 01.06.2022 from : To : Loading ref.

Sender Future Loading address Future B-1000; Bruxelles; Rue de la Loi 99; GPS: 50.8436434 4.3770631;

Agreed to deliver ☐ FIX 06.06.2022 from : To : Delivery ref.

Receiver A Logistics Delivery address A Logistics LV-2108; Skulte; Skultes iela 1; GPS: 56.9185776 23.9567961;

Direction Import Trailer type TENT Loading type Side ☐ With declaration

Notes for carrier Internal notes

Income from client 2000.00 EUR Payment 30 days VAT Rate T1/EX1 Send invoices By mail Send POD By mail

Invoice Not order invoice created!


Packs	Size	Bruto	Ldm	Volume	Chrg.wt.	Cargo description
10 EPLL	L:1.20 W:0.80 H:1.80	300.00	4.00	17.280	7400.00	

#	Service	Income	Trip/Exp.no.	Transport No.	Load date	Delivery.d	Invoice No.	Expence	POD	Carrier
	B-1000, Bruxelles -> LV-2108, Skulte	2000.00			01.06.2022	06.06.2022		*		

POD No. ☐ POD received Total Income: 2 000.00, Total costs: 0.00, Profit: 2 000.00

Saved: 30.05.2022 09:58 demo Save Cancel

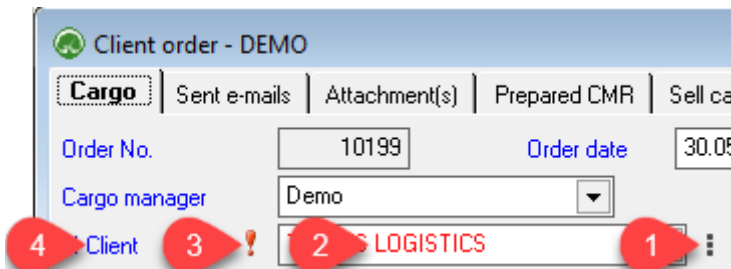
1. Basic order information - main principles:


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

Sender	Future	:	Loading ref.	
Loading address	Future	:	B-1000; Bruxelles; Rue de la Loi 99; GPS: 50.8436434 4.3770691;	

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 

New - Search/Add/Edit Partner

Company: cloudex

Street:

City:

Postal Code:

GPS:

Contacts:

Working Hours:

Notes:

Found addresses

Cloudex / LV-3018 Ozolnieku nov., Cenu pag., Iecēni, Dižozolu iela 33

Company: Cloudex SIA

Street: Cenu pag., Iecēni, Dižozolu iela 33

City: Ozolnieku nov.

Postal Code: LV 3018

Latitude: 56.6841202 Longitude: 23.8167146

Contacts:

[+] Working Hours:

Notes:


Save Cancel

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


Direction: Import Trailer type: TENT Loading type: Side

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:

Income from client Σ 2000.00 EUR f_x Payment 30 days VAT Rate T1/EX1 Send invoices By mail Send POD By mail
Invoice Not order invoice created!

- 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.

Packs	Size	Bruto	Ldm	Volume	Charg.wt.	Cargo description	
1 Packs	L:1.00 W:1.00 H:1.00		0.50	1.000	925.00	goods	Add1
3 Box	L:1.20 W:0.80 H:1.80	1800.00	1.20	5.184	2220.00	goods	Open
5 EPLL	L:1.20 W:0.80 H:1.80	3000.00	2.00	8.640	3000.00	goods	Delete

9pcs; 3.70ldm; 4800.00kg; 14.82m3; Chargeable weight: 6145.00kg;

To add a cargo description click **Add1**

Double-click to open an existing load description.

Cargo data

Cargo:
Loading address: 1234567890, Hungary; Delivery address: 7890123456, USA

Packaging amount: EPLL L: W: H: m

☐ from 5 EPLL EPLL STACKABLE ☐ Pallet exchange

Cargo name:

	Planned	Actual
Bruto weight, kg	<input type="text" value="3000.00"/>	<input type="text" value="0.00"/>
Place taken, ldm	<input type="text" value="2.00"/>	<input type="text" value="0.00"/>
Volume, m3	<input type="text" value="8.640"/>	
CHW, kg	<input type="text" value="3000.00"/>	

☐ Container

☐ Temperat. from: to Start/Stop

☐ ADR:

HS code: ☐ Goods to declare

Loading type:

Stat.No.: Marks: Cargo value:

Show in order:

Created: 08.08.2007 13:20:00

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 Idm 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.	Expende	POD	Carrier		Add2
-1	- SE, Vasteras -> S-6*DEMO terminal	70.00			12.04.2022*	13.04.2022*		70.00	*			Open
0	S-6*DEMO terminal -> FI, Muurla	1390.00			13.04.2022*	20.04.2022*		1000.00	*			Delete
10	- multa	50.00	-						*			

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 "checkbox" must be ticked




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

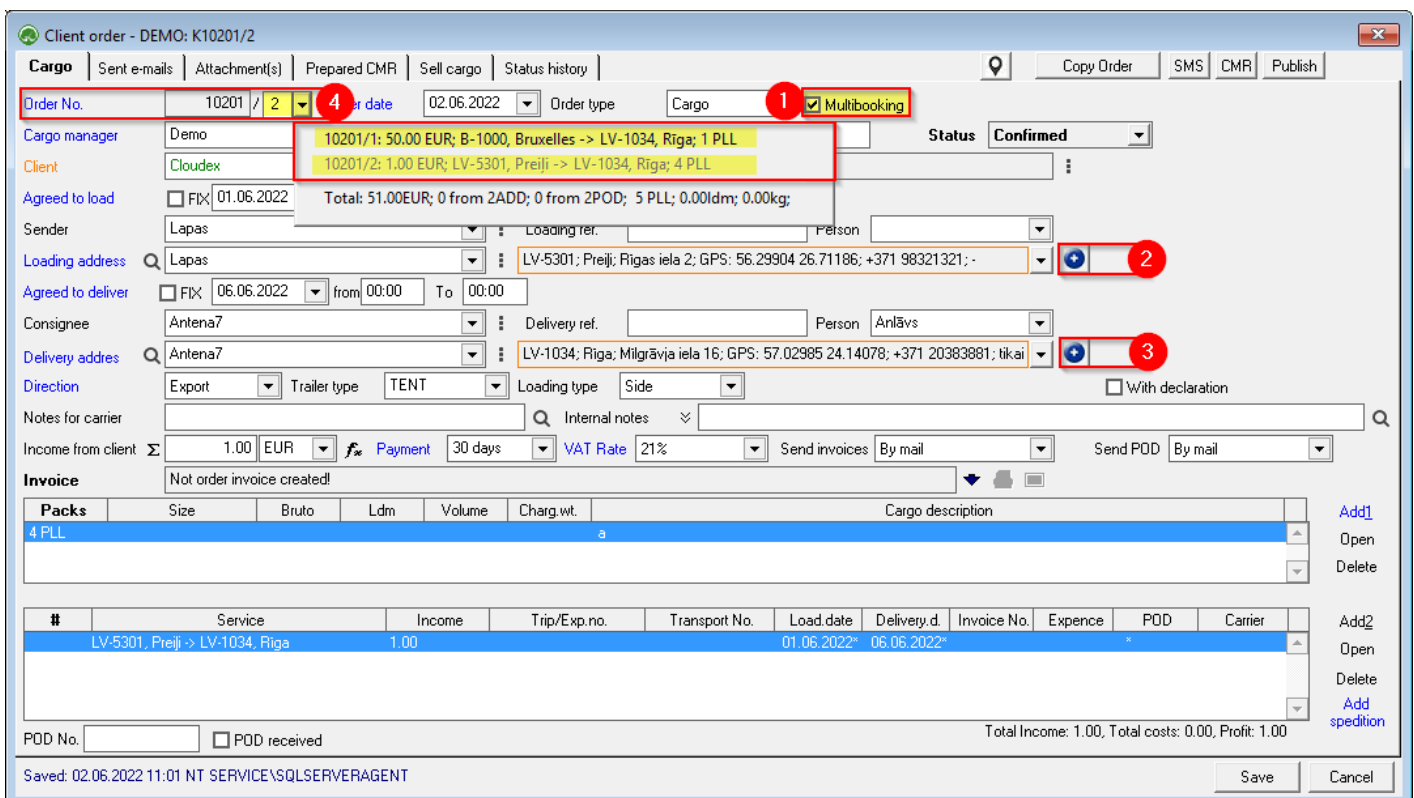
6. Once the order has been entered, it must be added to the [Trip / Expedition that will deliver it!](#)



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 screenshot shows the 'Client order - DEMO: K10201/2' window. The 'Cargo' tab is active. The 'Order No.' is 10201, and the sub-number is 2 (highlighted with a red circle 4). The 'Multibooking' checkbox is checked (highlighted with a red circle 1). The 'Status' is 'Confirmed'. The 'Loading address' is 'Lapas' (highlighted with a red circle 2). The 'Delivery address' is 'Antena7' (highlighted with a red circle 3). The 'Income from client' is 1.00 EUR. The 'Packs' table shows 4 PLL. The 'Trip/Exp.no.' table shows a single trip from LV-5301, Preiji to LV-1034, Riga.

#	Service	Income	Trip/Exp.no.	Transport No.	Load date	Delivery d.	Invoice No.	Expende	POD	Carrier
1	LV-5301, Preiji -> LV-1034, Riga	1.00			01.06.2022*	06.06.2022*			*	

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**

Client order - DEMO - K10199

Cargo | Sent e-mails | Attachment(s) | Prepared CMR | Sell cargo | Status history | Copy Order SMS CMR Publish

Order No: 10199 Order date: 30.05.2022 Order type: Cargo ☐ Multibooking

Cargo manager: Demo Client order No: Status: Confirmed

Client: Company: Contact info:

Agreed to load: 30.05.2022 09:00 To: 30.05.2022 18:00 Loading at:

Agreed to deliver: 30.05.2022 09:00 To: 30.05.2022 18:00 Delivery at:

Receiver: A Logistics Delivery at:

Delivery address:

Direction: Import Trailer type: TGN7 Loading type: Cuts ☐ With declaration

Notes for carrier: Internal notes:

Income from client: 2000.00 EUR ☐ Payment 30 days ☐ VAT Rate: 11.0% ☐ Send invoice: By mail ☐ Send POD: By mail ☐

Services: No. 1000000000 Date: 30.05.2022 From: 2000.00 EUR Payment term: 30.05.2022 To: 2000.00 EUR Language: LV

Price	Type	Units	Units	Volume	Charge	Cargo description
10.000	1.1	20.00	1.1	20.00	1.1	20.00

No.	Service	Income	Trp/Exp no.	Transport No.	Load date	Delivery d.	Invoice No.	Expense	POD	Carrier
1	8-1000000000 - LV-2100000000	2000.00			30.05.2022	30.05.2022				

POD No. ☐ POD received

Total Income: 2 000.00, Total costs: Price/LDM: 500.00

Saved: 30.05.2022 16:21 demo

Add2

Main service
Delivery through terminal
Additional service
Add/Edit THC

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.

The screenshot shows a software window titled "Service to be Provided". It contains several input fields and checkboxes. A red box highlights the "Service type" section, which includes a dropdown menu set to "custom", a text field for "Explanation in invoice" containing "Customs clearance services", and a date range from "01.06.2022" to "06.06.2022". A red circle with the number "1" points to the "Explanation in invoice" field. Another red box highlights the "Carrier" section, which includes a dropdown menu set to "Demo", a "Carriers manager" dropdown, and a "Sequence in trip" field set to "1". A red circle with the number "2" points to the "Carriers manager" dropdown. Other fields include "Order" (Order Nr: K10199; Customer: Company1; Loading address: 1000 Bruxelles, Belgium; Delivery address: 2108 Skulte, LATVIJA), "Sequence in order" (11), "Price for client" (50.00000), "Quantity" (1.00 pcs), "Income" (50.00 EUR), "VAT rate" (21%), "Price for carrier" (40.000), and "Price for carrier" (40.00 EUR). Checkboxes include "Include service in invoice" (checked), "Service income and expenses apply to cargo main trip" (unchecked), "There will be no incoming invoice" (unchecked), and "Fix carrier price" (unchecked). The bottom of the window shows a "Saved: 10.08.2022 17:52 demo" status and "Save" and "Cancel" buttons.

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"

1 Partner

Basic Data 2 Other Data For bookkeeping Other Attachment(s) Sales

Bank Bank Account SWIFT Currency

ADR Carrier End customer Pārbaudīts Saliktās kr... 3 ☒ Termināls

Advance pers... Client Expeditor Pilnās kravas Sender Use myShipm...

☒ Agreement ter... ☐ Down trader ☐ Muitas punkts ☐ Receiver ☐ Supplier

Add Open Delete

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;

- Delivery from the loading address to the terminal (**pick up**) # -1; #-2

3) Additional **shipments after the main** trip are positive numbers

- Delivery from the terminal to the delivery address (**domestic**) # 1; # 2

4) Additional **services** , such as customs, insurance, etc. are numbered from ten # 10; #11...

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](#) .

Piegāde caur terminālu

Pasūtījums: Pasūtījums nr: 10190; Klients: Uzņēmums 1
Uzkraušanas adrese: LATVIJA; Piegādes adrese: 10787 Berlin, Germany

3 A B

Termināls: DEMO terminal; LV-2131; Rīga; Terminal street 11; GPS: 56.95969 24.09467;

4

Jaunais piegādes maršruts: LV -> DEMO terminal*

Plānots piegādāt terminālā: 21.04.2022 00:00; Ieņēmumi: 100.00

Lokālās piegādes izdevumi: 100.00 EUR; PVN likme: 21%

5

Reisa/Eksped.nr. -> D273; Domestic; AA1111; Pārvadātājs: abc

Saglabāts: 21.04.2022 14:10 demo

Saglabāt Atcelt

How to simultaneously mark several loads for delivery through the terminal?

A. In the **Trip/spedition window** > Hold the Ctrl key with the mouse to mark the loads that will go through one terminal > Add > Delivery through the terminal

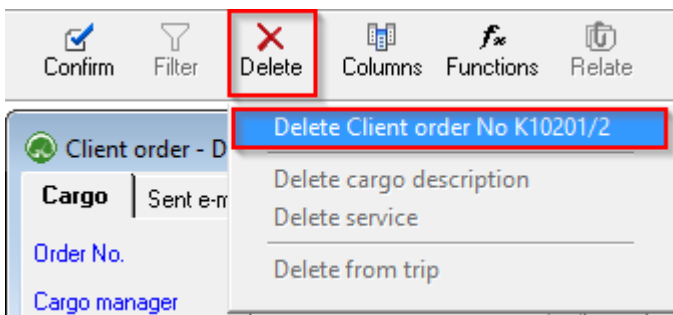
B. **Expeditor's desktop** (F8) > "General planning" page > Right mouse button on the selected load > Delivery through the terminal

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 [here](#) .

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

The screenshot displays the OZOLS TMS interface. At the top, a toolbar contains icons for Columns, Functions, Relate, Print, Mail, Multiselect, View, Book, and Favorites. The 'Mail' icon is highlighted with a red circle and the number 2. Below the toolbar, a table lists clients with columns for Client, Status, and a third column. The table contains three rows: City C (Delivered, S-11), Antena7 (Delivered, LV-2), and uzņemums01 (Is invoice, LV-1). The 'Antena7' row is selected. Below the table, a form titled 'Client order - DEMO - K10207' is visible. The form has tabs for 'Cargo', 'Sent e-mails', and 'Attachment(s)'. The 'Cargo' tab is active, showing fields for Order No. (10207), Cargo manager (Demo), Client (Antena7), Agreed to load (checkbox, 10.08.2022), Sender (EKG Cargo), Loading address (DEMO terminal), Agreed to deliver (checkbox, 15.08.2022), Receiver (Jelgavnieks), Delivery address (Peab Sverige), Direction (Export), and Notes for carrier (plistoša krava). A red circle with the number 1 is next to the 'Client order - DEMO - K10207' title. A context menu is open over the 'Mail' icon, listing various actions. The 'Order for carrier' option is highlighted with a blue background and a red circle with the number 3. Other options in the menu include 'Inform client for cargo accepting', 'Order for client', 'CMR', 'Package stickers A6', 'Package stickers A5', 'Package stickers A4', 'Confirmation request to shipper', 'Inform cargo manager for putting cargo in trip', 'Info for cargo sender', 'Inform Loading adress for cargo loading', 'Cargo status/tracking email', 'Inform client for cargo loading', 'Planned delivery information', 'Inform client for cargo delivery', 'Send order attachments to client', 'Invoice', 'Confirmation receipt of invoice', and 'Invoice payment reminder'.

Client	Status	
City C	Delivered	S-11
Antena7	Delivered	LV-2
uzņemums01	Is invoice	LV-1

1 Client order - DEMO - K10207

Cargo | Sent e-mails | Attachment(s)

Order No. 10207

Cargo manager Demo

Client Antena7

Agreed to load ☐ FIX 10.08.2022

Sender EKG Cargo

Loading address DEMO terminal

Agreed to deliver ☐ FIX 15.08.2022

Receiver Jelgavnieks

Delivery address Peab Sverige

Direction Export

Notes for carrier plistoša krava

- Inform client for cargo accepting
- Order for client
- CMR
- Package stickers A6
- Package stickers A5
- Package stickers A4
- Confirmation request to shipper
- Order for carrier**
- Inform cargo manager for putting cargo in trip
- Info for cargo sender
- Inform Loading adress for cargo loading
- Cargo status/tracking email
- Inform client for cargo loading
- Planned delivery information
- Inform client for cargo delivery
- Send order attachments to client
- Invoice
- Confirmation receipt of invoice
- Invoice payment reminder

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

LOGO

Demo SIA, VAT Number: LV000000000000, legal address: Dzirnavu iela 55, LV-1000 Rīga
Postal address: Lielbaltu iela 3, LV-1010 Lielbaltu
Jelgavas, 2200, +371(0)66000000, Phone: +371(0)66000000, jans.vassiljevs@ozols.lv, Fax: +371(0)66000000

CARGO TRANSPORTATION ORDER - AGREEMENT **5** **TW30-K10207**

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.

1 Client order - DEMO - K10207

Cargo | Sent e-mails | Attachment(s) | Prepared CMR | Sell cargo | Status history | Copy Order | SMS | CMR | Publish

Order No. 10207 Order date 02.08.2022 Order type Cargo ☐ Multibooking

Cargo manager Demo Client order No. 3 TW30-K10207 Status: Delivered

Client 2 Antena7 Contact Info: Anlāvs

Agreed to load ☐ FIX 10.08.2022 from 00:00 To 00:00 Brought 10.08.2022 00:00 Brought No.

Sender EKG Cargo Loading ref.

Loading address DEMO terminal

Agreed to deliver ☐ FIX 15.08.2022 from 00:00 To 00:00

Receiver Jelgavnieks Delivery ref.

Delivery address Peab Sverige

Direction Export Trailer type REF Loading type

Notes for carrier plīstoša krava Internal notes

Income from client EUR Payment 30 days VAT Rate T1/EX1 Send invoices By mail Send POD By mail

Invoice Not order invoice created!

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

3) To check the status of Cargo information exchange:

Delete

Columns

2

Functions

Relate

Print

Mail

Multiselect

View

Book

Favorites

Exit

1

Client order - DE

Cargo

Sent e-mail

Order No.

Cargo manager

Client

Agreed to load

Sender

Loading address

3

Agreed to deliver

Receiver

Copy Client order

Create CMR

Show cargo route on map

Open cargo track & trace page

Send SMS to driver with loading info

Send SMS to driver with delivery info

Send SMS to driver with loading and delivery info

Put loading info on "Clipboard"

Put delivery info on "Clipboard"

Put loading and delivery info on "Clipboard"

Additional fields

4

Order export status

PLL exchange report

Open client gift cards

address

Cargo manager

Income

Expenses

Profit

Dept of Invoice

Copy

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	

Cargo import/export status			<div></div> <div></div> <div></div>
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		