

# 10) Tips and Tricks

- Forwarders' work surface (F8)
- E-mail alerts
- Order information in foreign language
- Client address in foreign language
- How to change the Document's sequence number
- Work with several companies
- Access shortcut to another company's database OZOLS TMS
- How to Delete ferry ticket

# Forwarders' work surface (F8)

The Forwarder surface is created specifically at the request of our customers and combines functions that are directly related to the freight forwarder's work. It provides an opportunity to quickly select the necessary records with the help of filters, to plan and manage the Forwarder's work.

Forwarders work surface is **opened** by pressing **Function key F8** , or **Main menu > Window > Forwarders desktop**

## The forwarder desktop includes:

1. **Client orders** : All customer orders together;
  2. **Services** : All services provided together;
  3. **Trip/Spedition**: All Trip/Speditions and their cargo;
  4. **Vehicles**: all information about your and contractors' machines;
  5. **Terminal deliveries** : Trip planning for terminal cargo;
  6. **General planning**: Adding loads to flights;
  7. **Delivery** : Current trips and it's cargo information;
  8. **Client Analysis**: Work with clients - frequency, volumes, settlements, etc.;
  9. **Carrier analysis**: Together, the directions of the carriers, profitability, etc. are visible;
  10. **Comes in terminal** : Operations with incoming cargo (status, CMR labels, etc.);
  11. **Takes away from the terminal** : Operations with outgoing cargo (status, CMR labels, etc.);
- A) **Filters** for record selection;
- B) Selected **Entries** .

**Data**   **Text**   **Documents**   **Reports**   **Lists**   **Izase**   **Configuration**   **Window**   **Help (?)**

---

Browser   Back   Forward   New   Confirm   Filter   Delete   Multiselect   Columns   Functions   Relate   Print   Mail   View   Book   🔔   ❤️ Favorites   Exit

---

1 Editor   2 Find   3 Filter   4 Trip/Spedition   5 Vehicles   6 General Planning   7 Delivery   8 Client Analysis   9 Carriers analysis   10 Comes in terminal   11 Take away from terminal

---

Truck   Trucks Trip   Trucks Ferry   Find      ☐ Status   Import; Export; Loaded; Transfer/Roundtrip   ☒ View   Last Loading      ☐ Trailer type  

---

Starts	Trip No.	Puller, Trailer, Driver	Cargos	Free LDM	Bruto	Packs	Notes	Carrier	Expendit.
<b>HH 1234 / RR 1234</b>									
08.01.2021	TS275	FF-162	D-69117, Heidelberg (Loaded) -> Demo		2400	6.40ldm		DSV Transport	Demo
09.12.2022	TS27	LT7170/Z2604	LV-2131, Riga -> Demo			0.00ldm		Demo	Demo

---

**Add to Trip >>**   ☒ Find   From  To    ☒ Terminal   ☐ Group terminal orders   ☐ Don't show domestic deliveries

---

Ready from	Load	Deliver	Important	LDM	Bruto	Price	Client	Last delivery	Sped.	Cargo No.
04.04.2022	LV	LV-2131, Riga *DEMO terminal	Temp.+10		500	100.00	Uzp&mums 1	D-10787, Berlin; Berlin Zoo	Demo	K10184/2
12.04.2022	SE, Vasteras	FI, Muurla		3.00		140.00	7 WAYS LOGISTICS		Demo	K10187
17.05.2022	D-14478, P *Potsdam Terminal DE	LV-1003, Riga		0.60	300		Sales Agency		J.V	K12-1
31.05.2022	B-1931, Machelen *Cargo Brussels	LV-2108, Skulte		3.70	4800	1000.00	Company1		Demo	K10198/1
01.06.2022	B-1000, Bruxelles	LV-2108, Skulte	FIX L	4.00	300	2000.00	Company1		Demo	K10199
02.06.2022	B-1000, Bruxelles	B-1931, Machelen *Cargo Brussels		3.70	4800	1000.00	Company1	LV-2108, Skulte; A Logistics	Demo	K10198/1
28.07.2022	B-1000, Bruxelles	LV-1034, Riga				50.00	Cloudex		Demo	K10205

10 cargos; 23.00 ldm; 10700 kg

# E-mail alerts

Ozols TMS already has standard automatic alerts set up by default, which are sent to the responsible persons by email. However, it is also possible to set them up individually for each user of OZOLS TMS.

Warnings are divided into:

1. User orders (created by user)
2. Orders available to the user (e.g. head of department)
3. Orders of all users (e.g. company manager)

Standard automatic warnings:

1. Prepaid invoices **are not paid until loading**
2. **The revenue** of the customer's order does not match the total amount of the issued invoices
3. Delivered cargo **has not** been **invoiced**
4. For customers whose **order** volume **decreases** or increases
5. **No prepaid** invoices issued
6. For open flights , the amount of cargo specified in the Customer's order **does not match** with what entered or left the warehouse
7. Cargo **is not added to the trip**
8. Cargo has been **added to the** trip
9. **Payment** for invoice **received**
10. Information **about debtors**

Additional warnings:

1. Orders for which POD ( **CMR** ) **is not sent**
2. Orders for which POD ( **CMR** ) **is not received**
3. Customers **credit limit is approaching or has already been exceeded**
4. No invoice **received** within 60 days
5. **No data entered** for own trips


6. Documents are missing **postings**
7. Unsent **invoices**
8. Cargo **is not included in the trip**
9. Permission expiry dates **for Cars/Trailers**
10. **Birthdays of** client contact persons

# Order information in foreign language


Because clients and suppliers are from different countries, documents often need to include information in a foreign language.

Ozols TMS allows translation in client's language, for example content of invoice -  
**Type of service; VAT rate explanation; Payment term**

## How to translate information into the client's language?

1. Translation is possible for fields that have a symbol  on the right side. It opens a window where you can enter the required translation.

## Service type translation into a foreign language

1. **OZOLS > Payments > Lists > Service types**
2. Choose the service that needs translation
3. Press the translate button 
4. Fill in the translation in corresponding language

Explorer Group by

- Warnings
- My favorites
- E-mail
- Finances
- Ledger
- Common lists
- Configuration
- Contacts
- Data exchange with bank
- Freight Forwarding
- Payments
- Documents
- Lists**
  - Bank account groups
  - Groups
  - Incoming invoice types
  - Outgoing invoice types
  - Payment terms
  - Receivables Corrections
  - Service types**
  - Text
- New
- Reports
- Tools

Code	Product Code	Title	UOM	Description
Fract	Transporta pakalpojumi	Uproc	gab.	
7760	Transporta izmaksas	22proc	gab.	

**Service type**

Type: Both type Status: Allow data entry Expense: Other

Code: Freight System type: Freight

Name: Freight

Unit: gab. Default VAT rate:

Income account: (Nav)

Expense account: 7120

Next per.exp.acc.: (Nav)

Notes:

☐ In invoice should be set

☐ By default show in outgoing

Saved: 13.10.2019 17:26

**Translations**

Translation for word: Transporta pakalpojumi

English	Freight
German	
Russian	Фрахт
Latvian	
Lithuanian	Transporto paslaugos
Estonian	
French	
Danish	

Save

# Client address in foreign language

Outgoing documents can include the Partner's contact details in a foreign language. To set this :

- 1) Indicate the preferred language of contact on the Client Card;
- 2) Translation of the contact details.

**Ozols > Contacts > Lists > All partners > [Open Partner card]**

Translation is available for the following fields of the Partner card:

1. Company Name
2. Contact person
3. Address



Partner

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

Name: Demo SIA

Code: Demo Language: Latvian

Registration No.: 44556677889 VAT Code: LV44556677889

Send invoices: By mail Invoice email:

Send POD: By mail

Status for carrier: Neutral Website:

Status: Neutral Status Info:

Person	Position	Phone	GSM	email	Skype
*Veldre Jānis		+37163050199	+37129489925	info@cloudex.lv	

Type	Address	Phone	Notes
Legal	Dzirnavu iela 33, LV-3033 Iecēni, LATVIJA (56.6840971 23.8166551)		
Loading/Delivery	Jelgavas iela 6, LV-4001 Limbaži, LATVIJA (57.5142530 24.7112819)		

Notes:

Save Cancel

To enter a translation:

1. Select the desired field and press **the right mouse button** ;
2. A window opens in which you choose **translate** ;
3. **Make an entry**

in the desired language and save.

The image shows a software interface for managing addresses. The main window is titled 'Address' and contains several input fields. The 'Street' field is highlighted with a red circle and the number 1. A context menu is open over the 'Street' field, with the 'Translate' option highlighted by a red circle and the number 2. Below the 'Address' window, a 'Translations' dialog box is open, showing the translation for the word 'Dīžozolu iela 33'. The dialog box has a red circle and the number 3 next to it. The translations are listed in a table:

Translation for word: Dīžozolu iela 33	
English	Dizozolu str 33
German	
Russian	улица Дижозолу 33
Latvian	
Lithuanian	
Estonian	
French	
Danish	

The dialog box also has a 'Save' button at the bottom.

In future outgoing documents, OZOLS TMS will insert contact information in the Partner's language.


## See also:

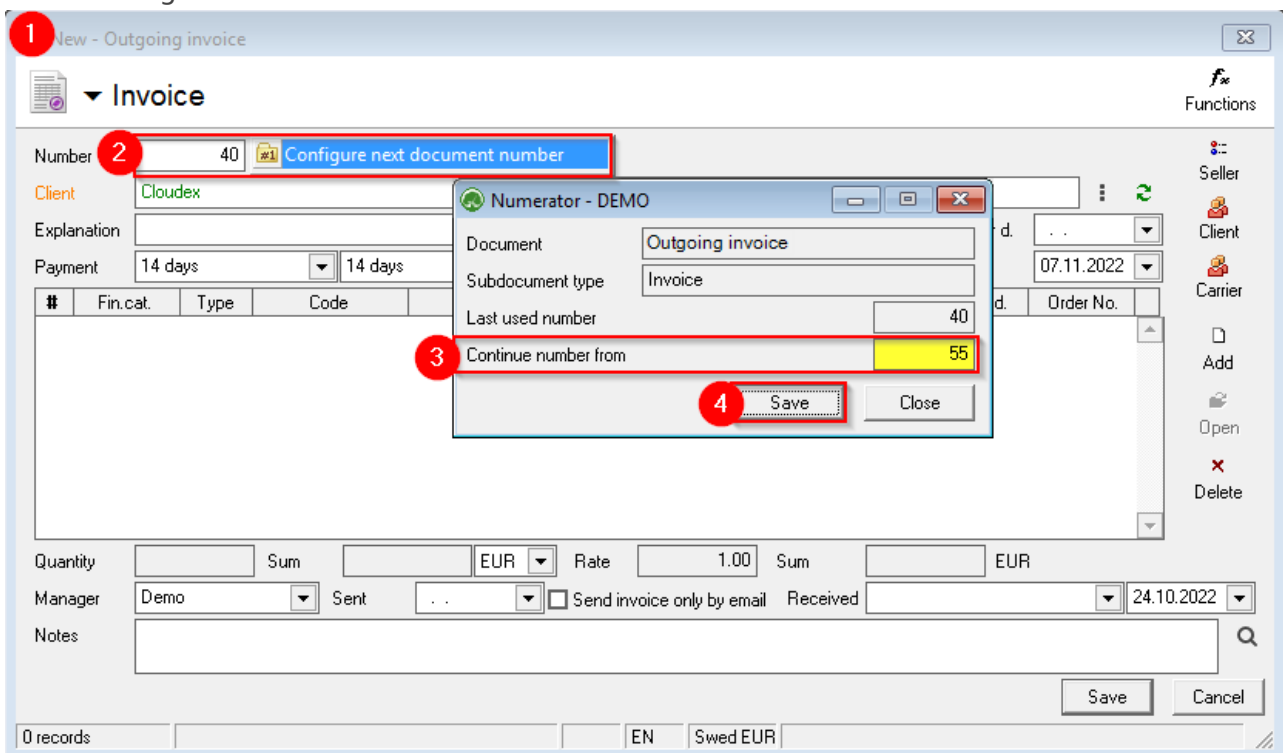
Information in the client's language - foreign language

Contract terms in the customer's foreign language

# How to change the Document's sequence number

For documents that have automatic sequential numbering, it is possible to set the number of the next document.

1. **Open** the desired document (e.g. outgoing invoice)
2. In the **Number** window, press **the right mouse button** . A window opens - **Configure next document number**
3. In **the Continue numbering from** window, enter the desired number
4. **Save** changes



The screenshot shows the 'New - Outgoing invoice' window. The 'Number' field is set to 40. A red box highlights the 'Configure next document number' button. A dialog box titled 'Numerator - DEMO' is open, showing 'Document' as 'Outgoing invoice' and 'Subdocument type' as 'Invoice'. The 'Last used number' is 40. The 'Continue numbering from' field is highlighted with a red box and contains the number 55. A red box also highlights the 'Save' button in the dialog. The background window shows various fields like 'Client' (Cloudex), 'Payment' (14 days), and 'Manager' (Demo).

#	Fin.cat.	Type	Code
---	----------	------	------

Quantity	Sum	EUR	Rate	Sum	EUR
			1.00		

Manager: Demo Sent: . . ☐ Send invoice only by email Received: 24.10.2022

Notes:

0 records EN Swed EUR

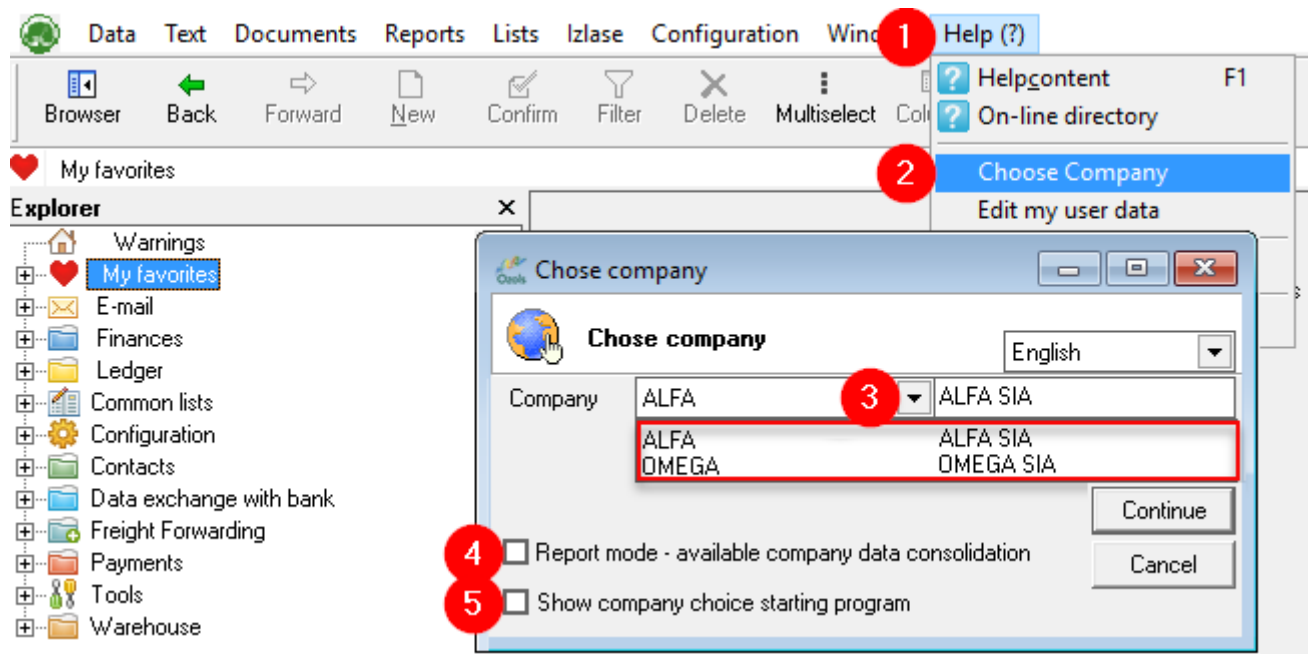
# Work with several companies

How to work if you have access to several company data bases?

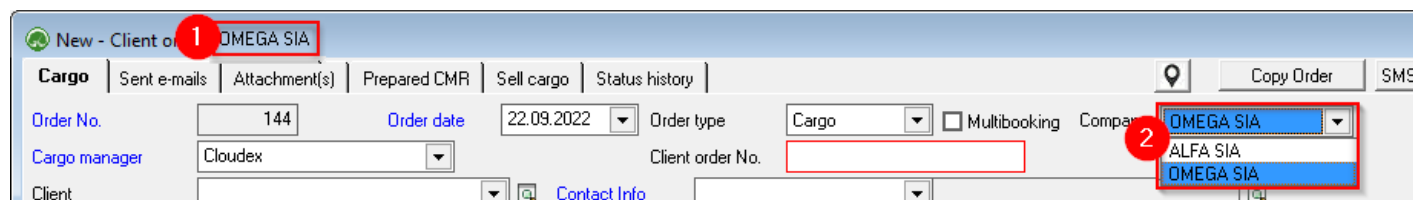
1. [Switching between companies](#)
2. [Choose the company in the New Customer's order](#)
3. [Set the default company for the cooperation Partner](#)
4. [Access shortcut to database of the other company](#)
5. [How to change the company for a created order?](#)
6. [How to change company for incoming invoice?](#)
7. Working with separate databases of several companies

## 1. Switching between companies

1. Help
2. Choose company
3. Select desired company
4. If you check ☒ the Consolidation, the data of all companies will be displayed together. If not, they will be separated!
5. If you check ☒ the option to choose the company will be given when opening OZOLS TMS



## 2. Choose the company in the New Customer's order



## 3. Set the default company for the cooperation Partner

It is possible for you to determine which of your companies to use by default in cooperation with the specific Partner.

1. Open **the Partner card**;
2. Open the **Other data** section;

### 3. Select **Default Company**.

The screenshot shows the 'New - Partner' dialog box with the 'Other Data' tab selected. The 'Default company' dropdown menu is highlighted with a red circle and the number 3. The dropdown menu is currently set to 'Our company'.

## 4. Access shortcut to database of the other company

If you have two or more companies with separate OZOLS TMS access , it is possible to create a shortcut to each of these companies. Instructions can be found [here](#) .

## 5. How to change the company for a created order?

If you have several companies available and you have entered the Customer's order and/or Trip/Expedition **to the wrong company**

1. Open **the Customer's order or Trip/Spedition**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!! Close the Customer's order or Trip/Spedition by pressing the Cancel button !!!**

Klienta pasūtījums - Uzņēmums

Dok.numurs: 0

Paskaidrojums:

Uzņēmums: OMEGA SIA (selected), ALFA SIA, OMEGA SIA

Buttons: Labot, Atcelt, Saglabāt (crossed out), Aizvērt

If the Invoice is also already issued from the wrong company, it must be deleted and a new Invoice created after correcting the company (shift+F4).

## 6. How to change company for incoming invoice?

1. Open **the Customer's Incoming Invoice**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!! Close the Incoming invoice by pressing the Close button!!!**

Ienākošais rēķins - Uzņēmums

Dok.numurs: 189

Paskaidrojums:

Uzņēmums: OMEGA SIA (selected), ALFA SIA, OMEGA SIA

Buttons: Labot, Atcelt, Saglabāt (crossed out), Aizvērt

# Access shortcut to another company's database OZOLS TMS

If you have **two or more companies with separate access to OZOLS TMS** , it is possible to create a shortcut to each of these companies. **Benefits:**

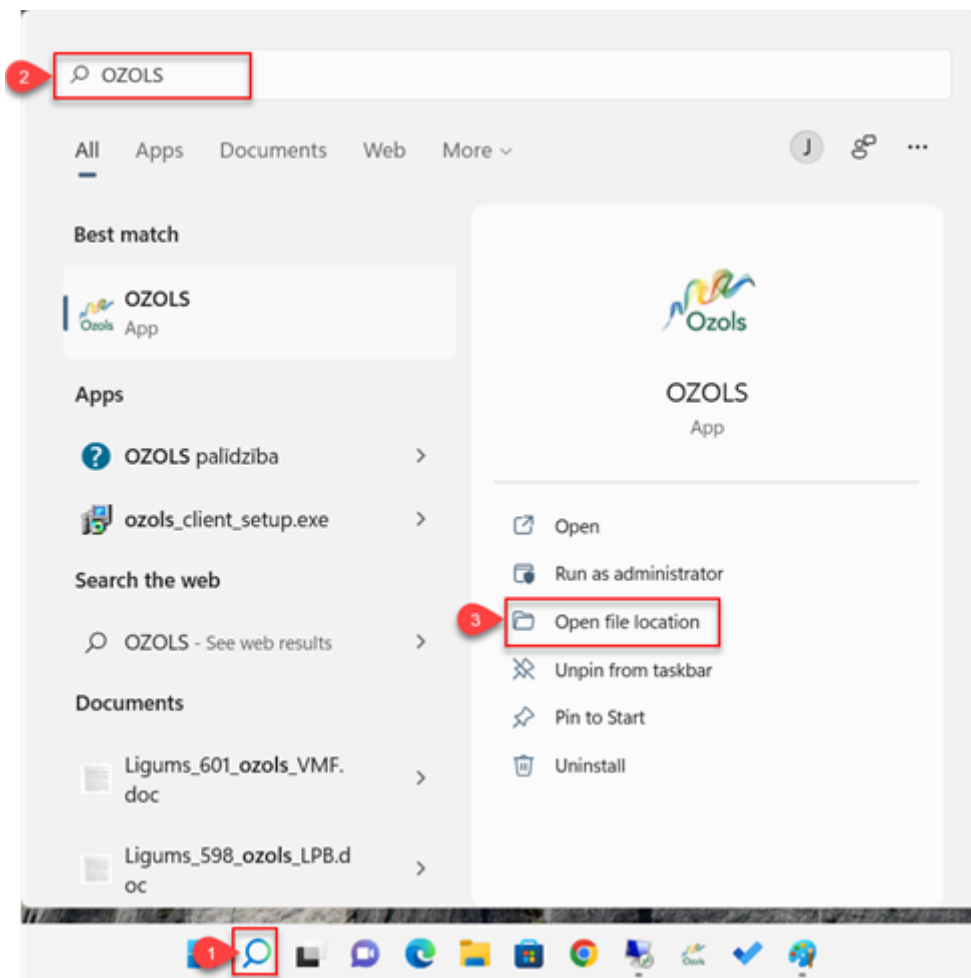
1. You only need **to enter a password when** opening company database;
2. **Open and work with several companies at the same time.**

1) press search on the Windows desktop ;

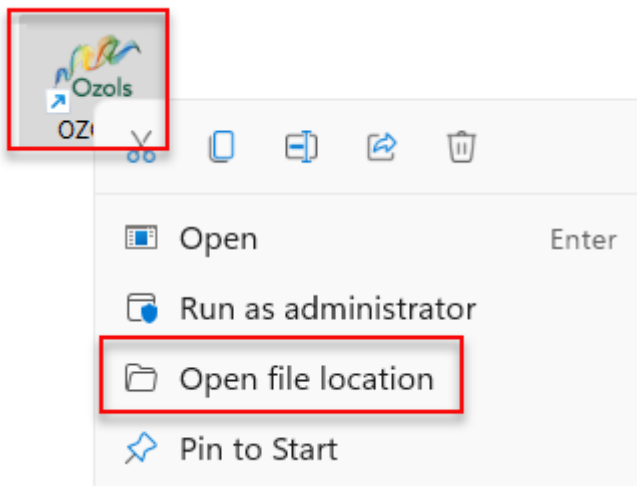
**2) OZOLS** is written in the search field ;

3) Select **Open file location** ;





4) Select Open file location again until a folder opens where you can see a file called OZOLS.EXE

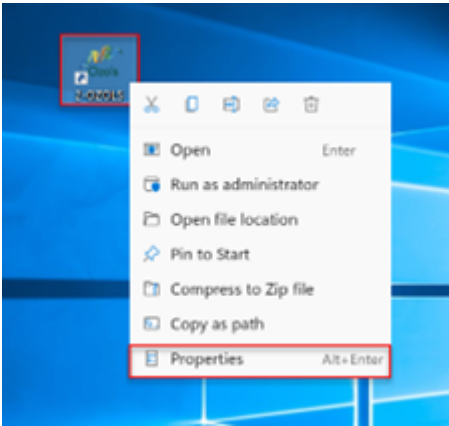


5) Create a **new Folder** with the name of the desired company.

6) **Copy** the OZOLS.EXE file and place the copy in the **newly created folder**.

**7) Create a shortcut** to the new OZOLS.EXE file on the desktop and **rename** it to fit the name of the desired company.

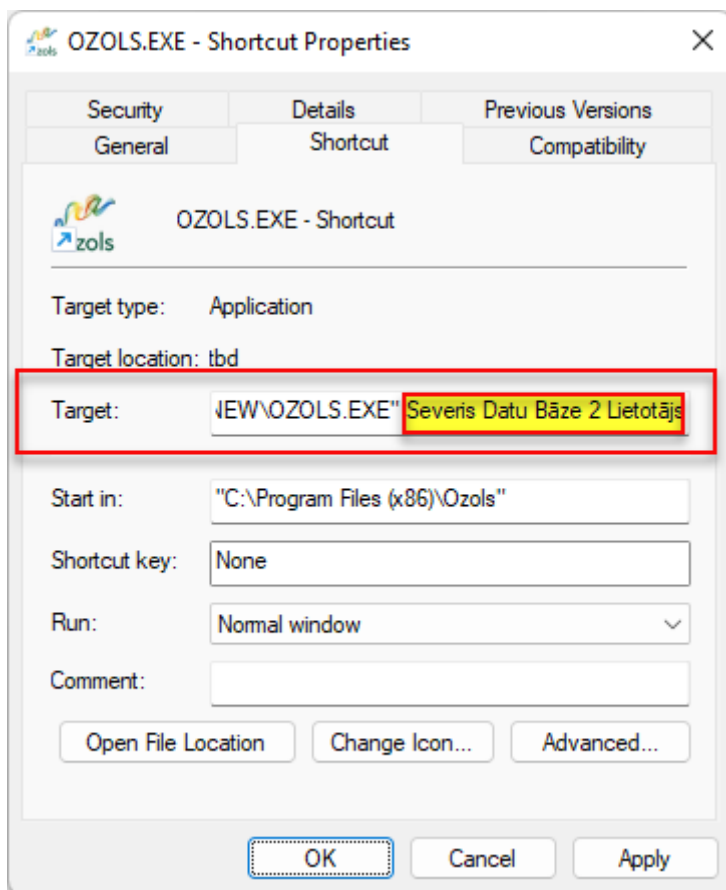
8) Open Functions with the right mouse button and select **Properties**.



9) In the **Target** field , add the already existing record with server, company database and user information:

1. **Server** – Name of the server on which the company OZOLS TMS database is located;
2. **Database** – the username assigned to the company in the Ozols database;
3. **2** - the number two, which must be entered before the user's name;
4. **User** – the username assigned to your Ozols user account.

**There must be a space** between these entries !



When the record has been updated, close the window by pressing **Apply** and **Ok** .

**Congratulations** ! You have created a separate access to the company account in OZOLS TMS!

**Now you can simultaneously open all companies that are available to you in OZOLS TMS on your computer.**

# How to Delete ferry ticket

To delete an incorrectly created ferry ticket:

1. Open the incorrect Ferry Ticket through Trip/Spedition

1 Trip/Spedition: **7W12** 13.04.2022 - 18.07.2022

Trip/Spedition | Finance | Calculations | Cargo delivery order | Drivers report | Drivers report (REF) | Attachment(s) | Extra stops

Previous trip: **7W12** 13.04.2022 - 18.07.2022

Cargo info: Load addr: 2, Dest addr: 2, 3, 2019-01-01 14:00:00 kg

Date: 18.11.2019

Type: Open Trip

Carrier: Demo

Transp.manager: Vadim Lapa

Export ferry

Import ferry: 01.07.2019 19:00 - 02.07.2019 10:00 Klaip-K/hamn, Expenses: 75.00 EUR, Length: 2.00

Trailer type:

2 Add ferry

3 Open Ferry 01.07.2019 19:00: Klaip-K/hamn, Length: 2.00

L#	D#	Cargo	Description	Client	LDM	Load date
1		413-01P	LV-1002, Paga + 1, 1002 16, Joma Lake Agency			01.07.2019
2		420-01P	LV-1002, Paga + 1, 1002 16, Joma Lake Agency			01.07.2019

2. Delete the Trip number from ticket and Save changes.

Ferry

1 Attach ferry to Trip: **7W12**

Agreement: HGK103/FZ908; Braun Lydia; Date from: 04.07.2019; to 08.07.2019; Carrier: 7 WAYS

Truck/Trailer No: HGK103/FZ908

Carrier: 7 WAYS LOGISTICS

Ferry line: Kap-Naant

Booking number:

Ferry departs: 01.04.2022 00:00

Register till: 01.04.2022 00:00

Ferry arrives: . . 00:00

Passengers: 1

Cabin: ☐ Cabin

Lenght: 17 m

ADR: ☐ ADR

Provide electricity: ☐ Provide electricity

Ferry operator: A Logistics

LV-2108; Skulte; Skultes iela 1; GPS: 56.9185776 23.9567961

Purchase price: 600.00 EUR

Invoice:

Sale price: 0.00 EUR

Invoice: Invoice is not created

Notes:

Expeditor: Demo

2 Save

Cancel

Saved: 28.04.2022 11:16 demo

3. **OZOLS > cargo transportation > Reports > Ferry tickets**
4. **Find** the record you want, use the filter if necessary
5. Press **Delete**
6. **Confirm** the deletion of the record

Browser

Back

Forward

New

Filter

Confirm

Columns

5

Delete

Multiselect

Functions

Relate

View

Print

Mail

Book

Favorites

Exit

Explorer

Group by

×

Warnings

My favorites

E-mail

Finances

Ledger

Common lists

Configuration

Contacts

Data exchange with bank

Freight Forwarding

Configuration

Documents

Lists

New

Reports

Activities

Cheques

Company in graphs

CRM activities

Daily Allowances

Drivers

Expire date

Ferry tickets

3

Find carrier

Ferry departs	Ferry line	Truck	Trip No.	Invoice No.	Price	Curr.	Purch.pr.Eur	Inv.No.	Sell.price Eur	Electr.	ADR	Passeng.
01.04.2022	Kap-Naant	4	HGK103/F2908	A15	600.00	EUR	600.00					1
21.09.2022	Kap-Naant	12788894022	A202		500.00	EUR	500.00					1
04.12.2019	Nyn-Vent	HH 18078/19 1228	Ta214	10	400.00	EUR	400.00					1
21.06.2019	Riga-Stock	HH 18078/19 1228	Ta216		250.00	EUR	250.00		475.00			1
08.06.2022	Riga-Stock	061228/19 1228	Ta229		250.00	EUR	250.00					1
13.06.2022	Tallin-Helsinki	061228/19 1228			250.00	EUR	250.00					1
11.03.2022	Klaip-K/hamn	AA11111		10	250.00	EUR	250.00					1
10.06.2022	Kap-Naant	121288/19 1228	Ta207		250.00	EUR	250.00					1
28.04.2022	Riga-Stock	121288/19 1228	Ta215		250.00	EUR	250.00					1
10.05.2022	Tallin-Helsinki	HGK103/F2908	Ta220	12	100.00	EUR	100.00					1
10.05.2022	Tallin-Helsinki	061228/19 1228			100.00	EUR	100.00					1
01.07.2019	Klaip-K/hamn	HH 1228/19 1228	Ta217	10	75.00	EUR	75.00					1

Ferry tickets

?

Delete record "01.04.2022"?

6

Yes

No