

# 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** .

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

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	Uzpēmums 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

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

1 Service types

2

3

4

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 se  By default show in outg

Translations

Translation for word: Transporta pakalpojumi

English	Freight
German	
Russian	Фрaкт
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	Dzelzceļa iela 33, LV-3033 Iecāni, LATVIJA (56.6840971 23.8166551)		
Loading/Deliver	Dzelzceļa iela 6, LV-4001 Limbaži, LATVIJA (57.5142530 24.7112819)		

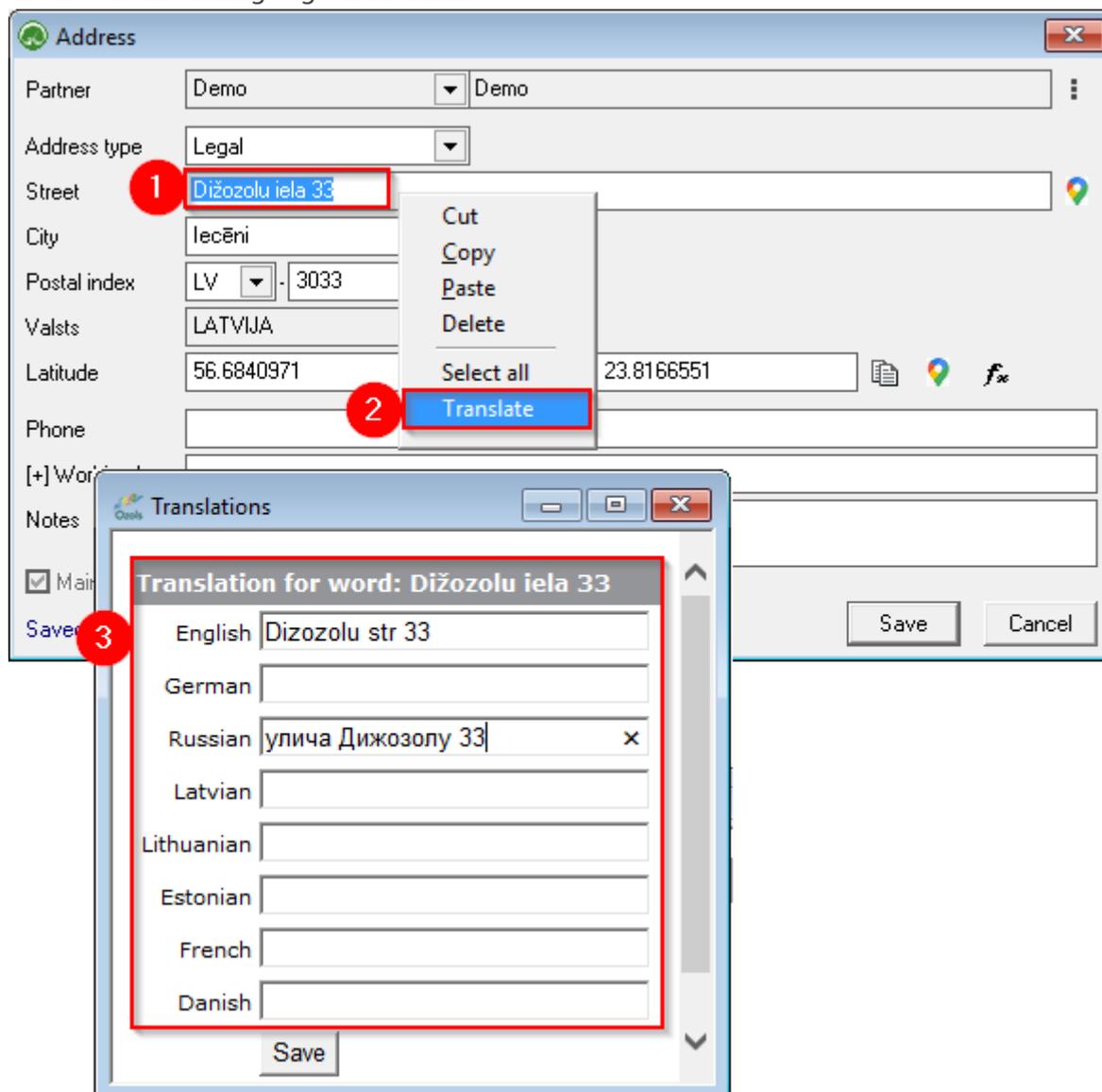
Notes:

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.



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

## See also:

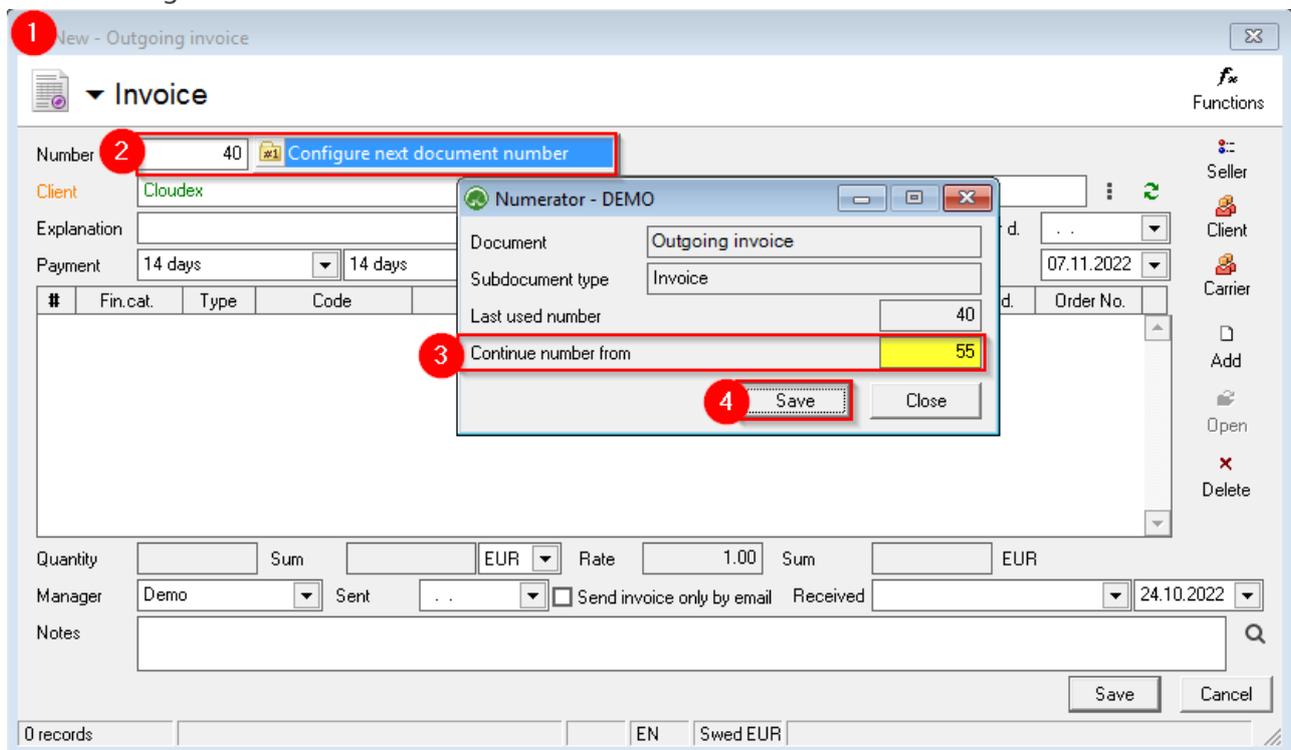
Information in the client's language - foreign language

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 right-click context menu is open over the 'Number' field, showing the option 'Configure next document number'. This option is highlighted in blue. Below the main window, a 'Numerator - DEMO' dialog box is open. It shows the document type as 'Outgoing invoice' and the subdocument type as 'Invoice'. The 'Last used number' is 40. The 'Continue number from' field is set to 55. The 'Save' button is highlighted in red. The main window also shows a 'Client' field with 'Cloudex', a 'Payment' field with '14 days', and a 'Manager' field with 'Demo'. The 'Save' and 'Cancel' buttons are visible at the bottom right of the main window.

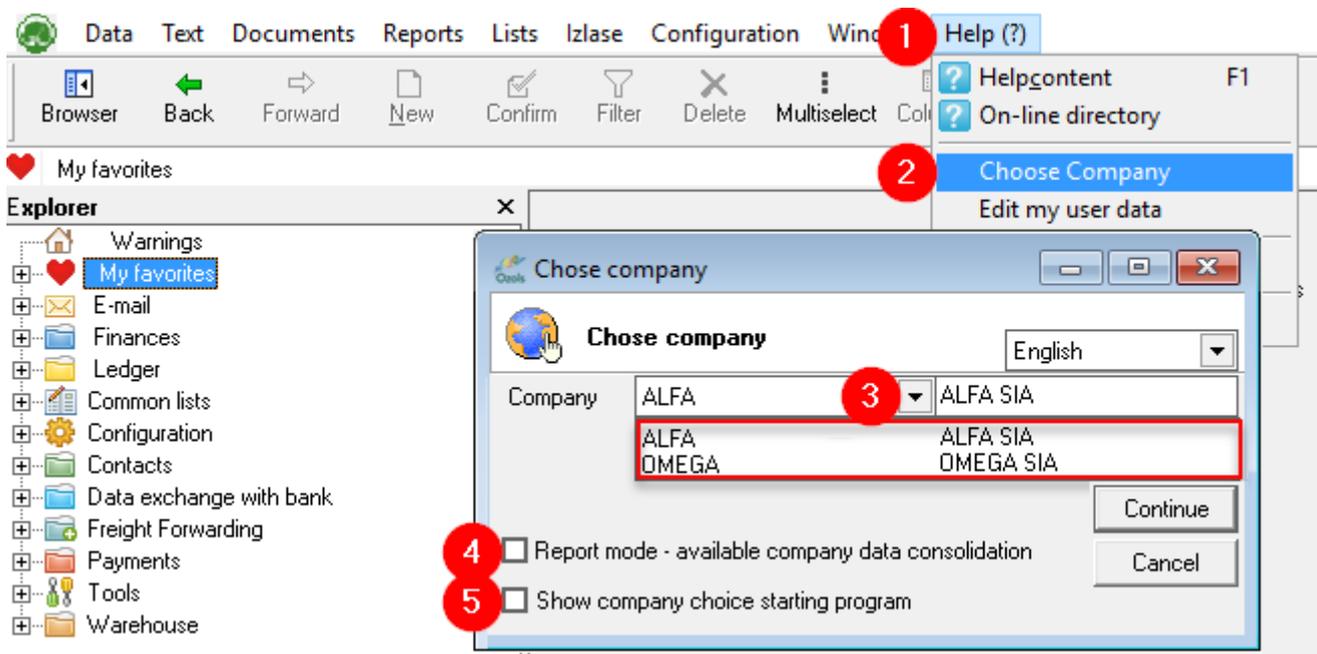
# Work with several companies

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

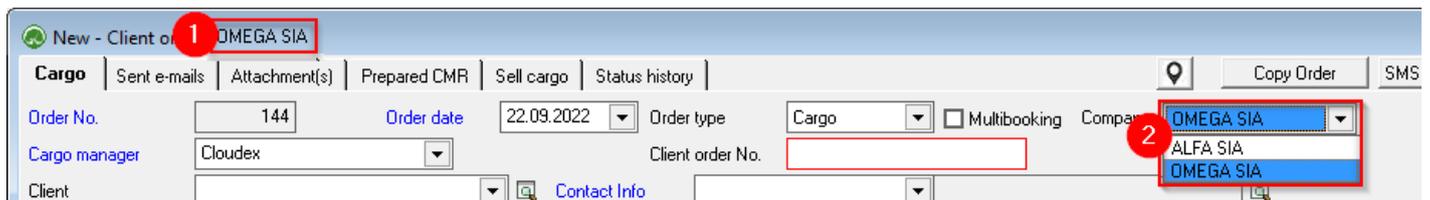
1. [Switching between companies](#)
2. [Choose the company in the New Customer's order](#)
3. [Set the default company for the cooperation Partner](#)
4. [Access shortcut to database of the other company](#)
5. [How to change the company for a created order?](#)
6. [How to change company for incoming 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 a software window titled "New - Partner" with a close button in the top right corner. The window has several tabs: "Basic D", "Other Data" (which is selected and highlighted with a red circle and the number 2), "For bookkeeping", "Other", "Attachment(s)", and "Sales". Below the tabs is a table with columns "Bank", "Bank Account", "SWIFT", and "Currency". To the right of the table are buttons for "Add", "Open", and "Delete". Below the table is a grid of checkboxes for various partner types: "Advance pers...", "Circles", "Down trader", "Full loads", "Recipient", "Terminal", "Approved", "Client", "End customer", "Make monthly...", "Sender", "Terminal agre...", "Carrier", "Customs office", "Expeditor com...", "Partial loads", "Supplier", and "Use myShipm...". Below the checkboxes are several input fields and dropdown menus: "Carrier price, 1km" (with a slash separator), "CMR insurance till" (with a dropdown), "Insured trucks" (checkbox), "Send invoices to" (dropdown), "Fuel surcharge" (percentage field), "Payment currency" (dropdown, set to EUR), "Credit Limit" (field), "EUR" (text), "Agreement No." (field), "Prohibit orders acceptance if max payment delay is more than" (field, set to 0 d), "Default company" (dropdown, highlighted with a red circle and the number 3), "Term of payment" (dropdown, set to 30 days), "Term of payment for incoming invoices" (dropdown, set to 40 dienās), "Skonto discount" (percentage field), "Skonto discount on incoming invoices" (percentage field), "Bank account group" (dropdown, set to [Default]), "CMR 16 pos.show" (dropdown, set to Our company), "Order view on invoice" (dropdown, set to 1. Detailed order info), "Post" (field, set to 7 days), "Addresses view in invoice" (dropdown, set to Street, Postal code, City), "Cargo descript view" (dropdown, set to Full cargo description), and a grid of checkboxes: "Hide loading/delivery date on invoice", "Negrupēt multibooking pakalp.rēķinā", "Prohibit data entry", "Hide sender and receiver on invoice", "In invoice order data print in supplement", "Print order without scanned signature", "Hide base currency sum on invoice", "Print invoices with signature", "Client himself issues invoices (self-billing)", "Show client debit/credit in invoice", and "Calculate Penalty Interest for Contracts" (which is checked). At the bottom right are "Save" and "Cancel" buttons.

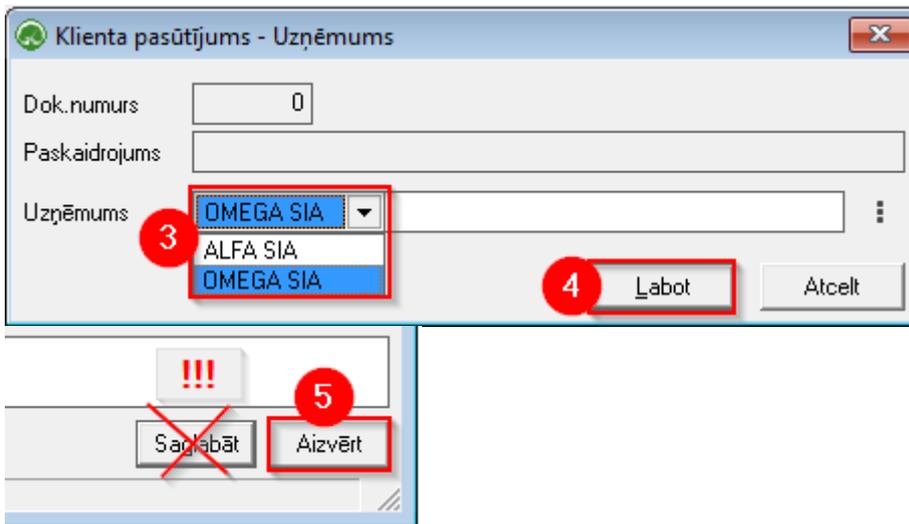
### 4. Access shortcut to database of the other company

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**

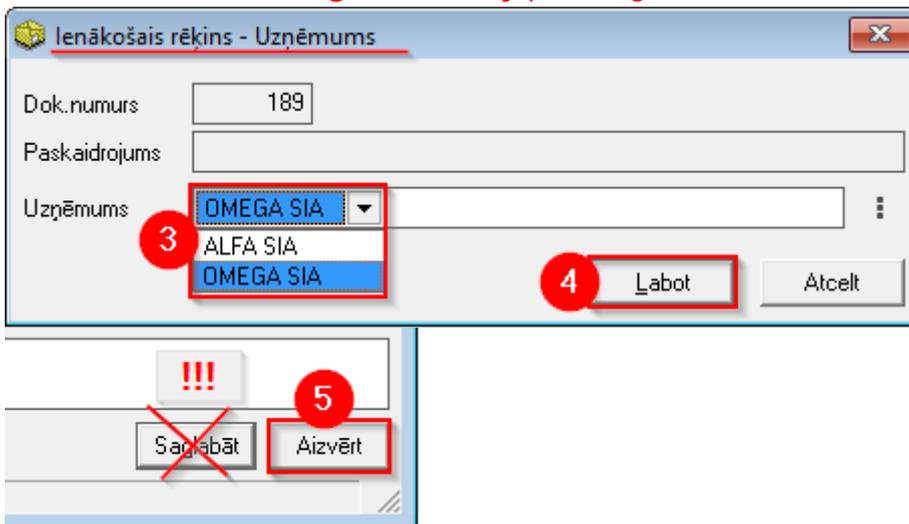
1. Open **the Customer's order or Trip/Spedition**
2. Press **Shift +F4**
3. **Change** company
4. Click the **Edit button**
5. **!!! Close the Customer's order or Trip/Spedition by pressing the Cancel button !!!**



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!!!**



# Access shortcut to another company's database OZOLS TMS

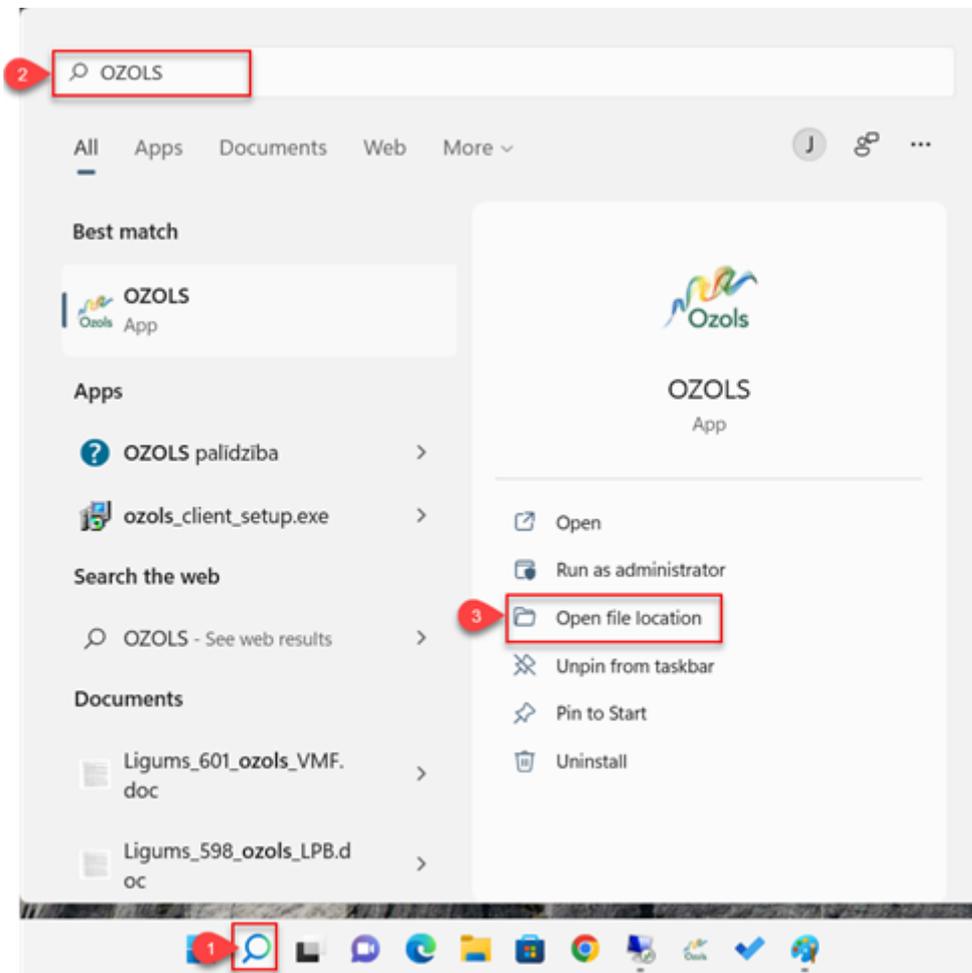
If you have **two or more companies with separate access to OZOLS TMS** , it is possible to create a shortcut to each of these companies. **Benefits:**

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

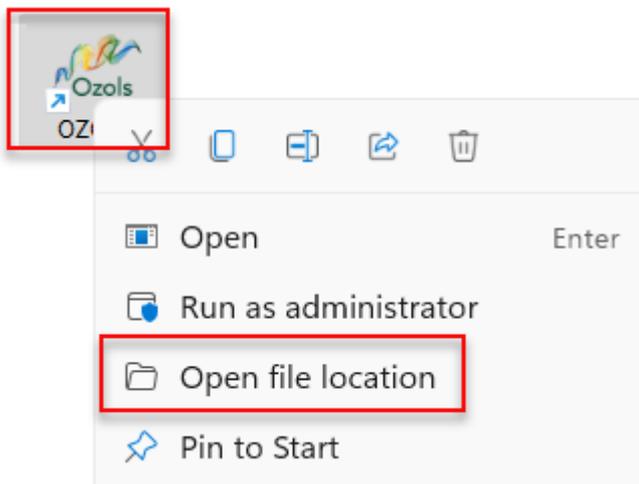
1) press search on the Windows desktop ;

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

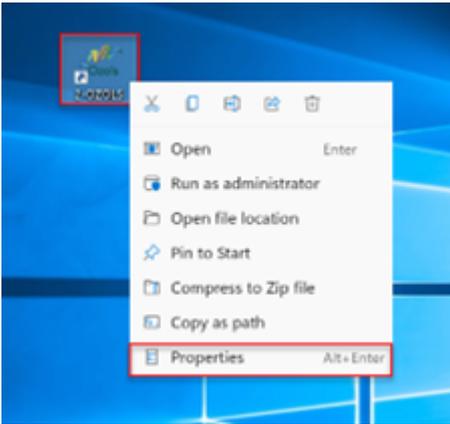


5) Create a **new Folder** with the name of the desired company.

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.

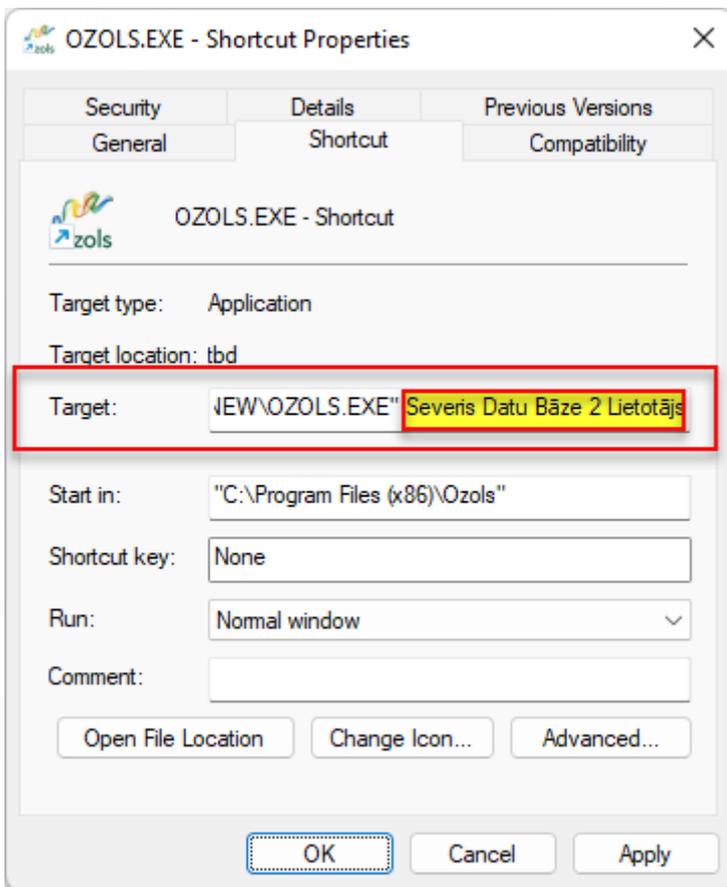
8) Open Functions with the right mouse button and select **Properties**.



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** .

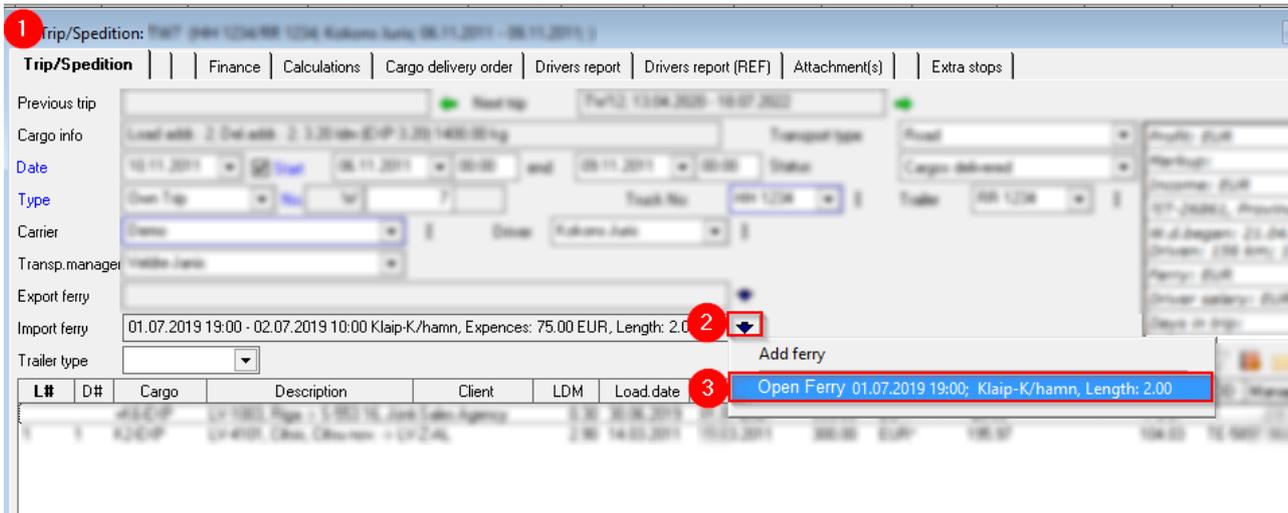
**Congratulations** ! You have created a separate access to the company account in OZOLS TMS!

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

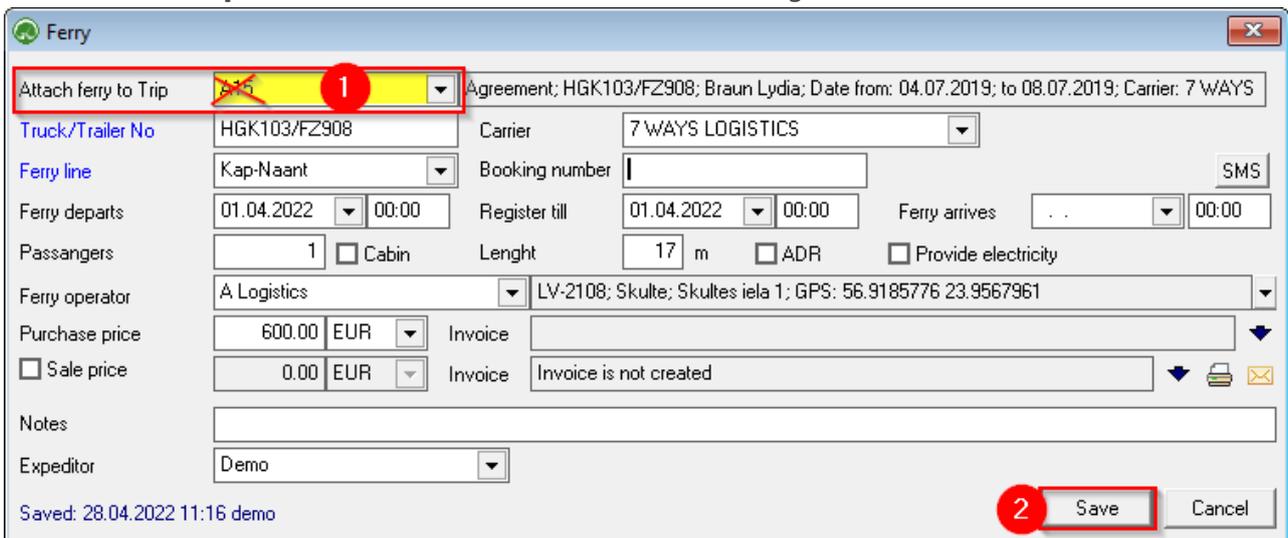
# How to Delete ferry ticket

To delete an incorrectly created ferry ticket:

1. Open the incorrect Ferry Ticket through Trip/Spedition



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



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



Explorer Group by x

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	HGK103/F 2908	A15		600.00	EUR	600.00					1
21.09.2022	Kap-Naant	FC28894622	A202		700.00	EUR	700.00					1
04.12.2019	Nyn-Vent	HH 16792 1228 Tacta		10	400.00	EUR	400.00					1
21.09.2019	Riga-Stock	HH 16792 1228 Tacta		10	200.00	EUR	200.00		475.00			1
08.09.2022	Riga-Stock	0612249 26	Tr229		200.00	EUR	200.00					1
13.09.2022	Tallin-Helsinki	AA12249 27			200.00	EUR	200.00					1
11.03.2022	Klaip-K/hamn	AA17171		10	200.00	EUR	200.00					1
10.09.2022	Kap-Naant	CE1228 77442	1207		200.00	EUR	200.00					1
28.04.2022	Riga-Stock				200.00	EUR	200.00					1
10.09.2022	Tallin-Helsinki	HGK103/F2908	Tacta	12	100.00	EUR	100.00					1
10.09.2022	Tallin-Helsinki	0612249 26			100.00	EUR	100.00					1
08.07.2019	Klaip-K/hamn	HH 122 888 1228 Tacta		10	75.00	EUR	75.00					1

Ferry tickets

6 Delete record "01.04.2022"?

6 Yes No

3