

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

Client orders Services Trip/Spedition Vehicles Terminal deliveries **General Planning** Delivery Client Analysis Carriers analysis Comes in terminal 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. |
|--------------------------|----------|-------------------------|--------------------------------------|----------|-------|---------|-------|---------------|-----------|
| HH 1234 / RR 1234 | | | | | | | | | |
| 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 Do not show domestic deliveries Don't show

| 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

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) | | |

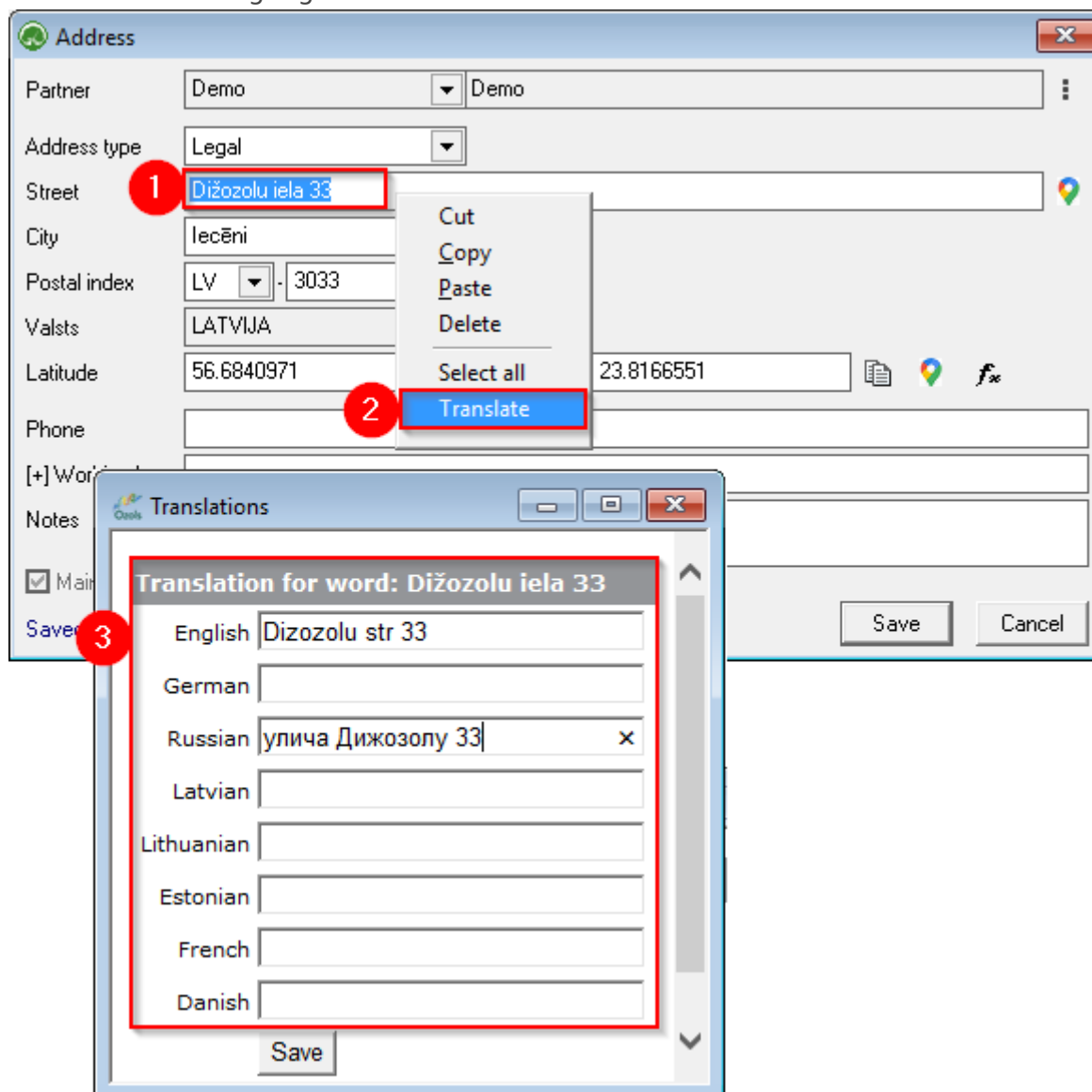
Notes:

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.



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


See also:

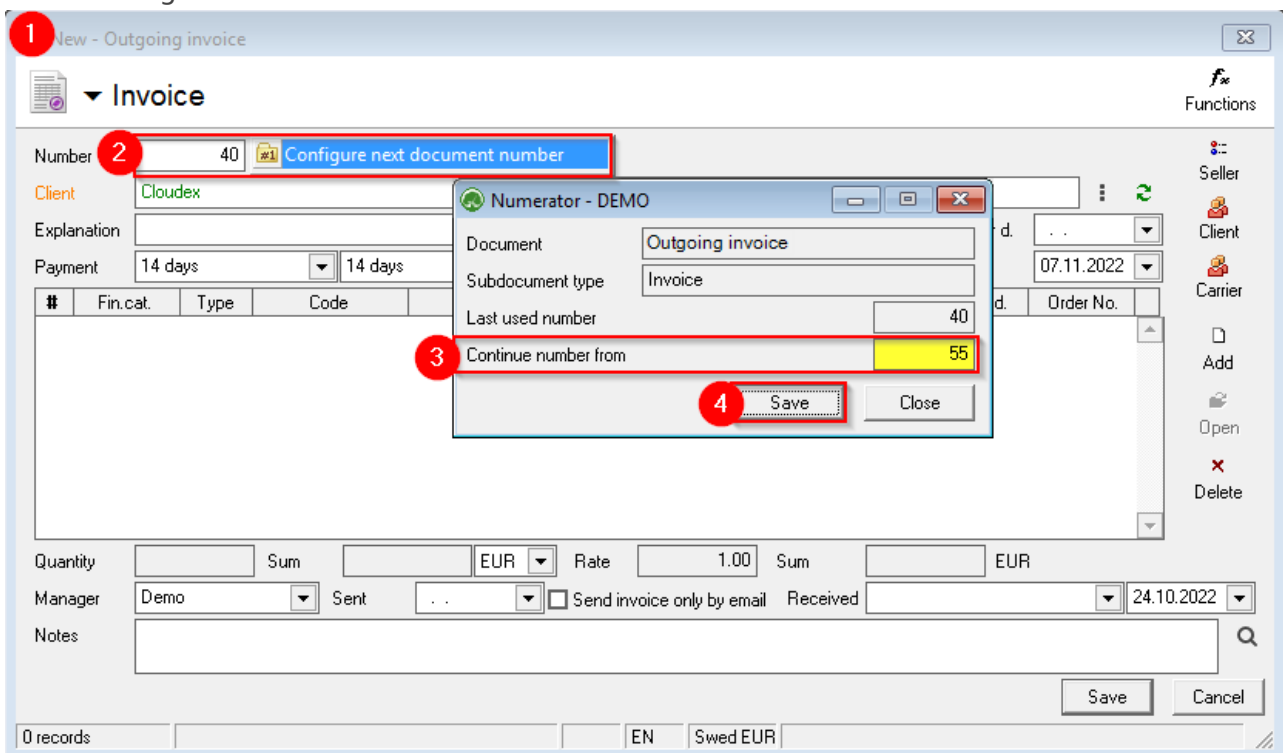
Information in the client's language - foreign language

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. The 'Numerator - DEMO' dialog is open, showing 'Outgoing invoice' as the document type and 'Invoice' as the subdocument type. The 'Last used number' is 40. The 'Continue numbering from' field is set to 55. The 'Save' button is highlighted with a red box. The main window also shows fields for Client (Cloudex), Payment (14 days), and a table for items.

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

Quantity: Sum: EUR Rate: 1.00 Sum: EUR

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

Notes:

0 records EN Swed EUR

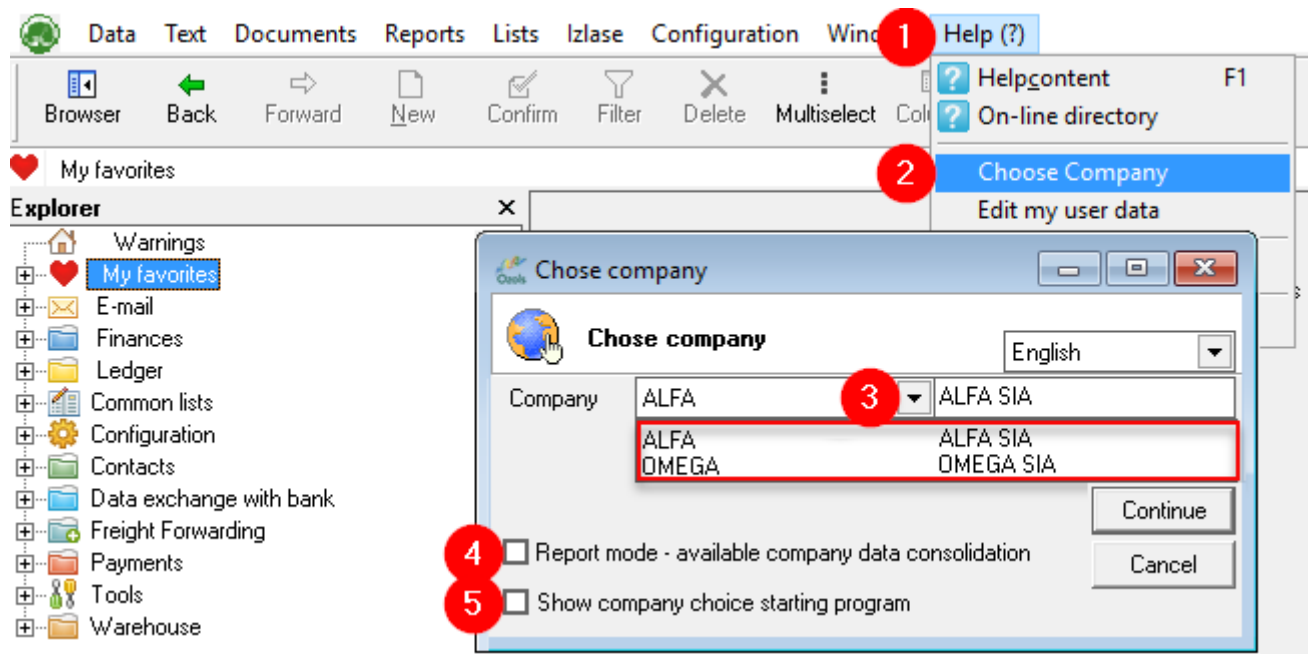
Work with several companies

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

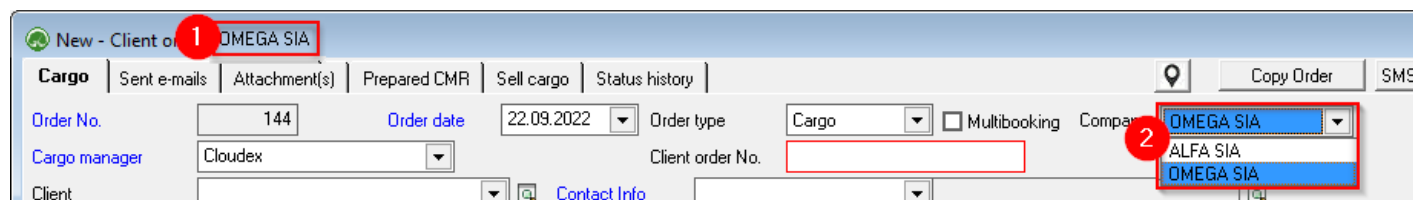
1. [Switching between companies](#)
2. [Choose the company in the New Customer's order](#)
3. [Set the default company for the cooperation Partner](#)
4. [Access shortcut to database of the other company](#)
5. [How to change the company for a created order?](#)
6. [How to change company for incoming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

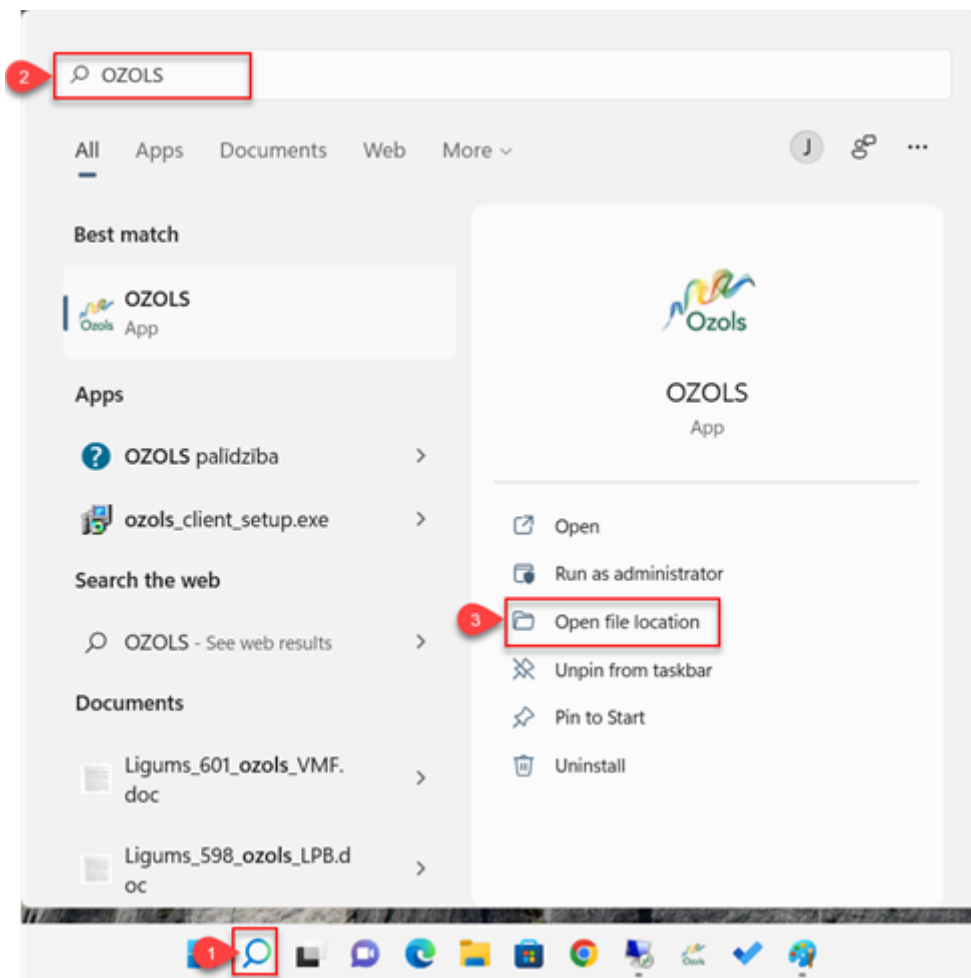
If you have **two or more companies with separate access to OZOLS TMS** , it is possible to create a shortcut to each of these companies. **Benefits:**

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

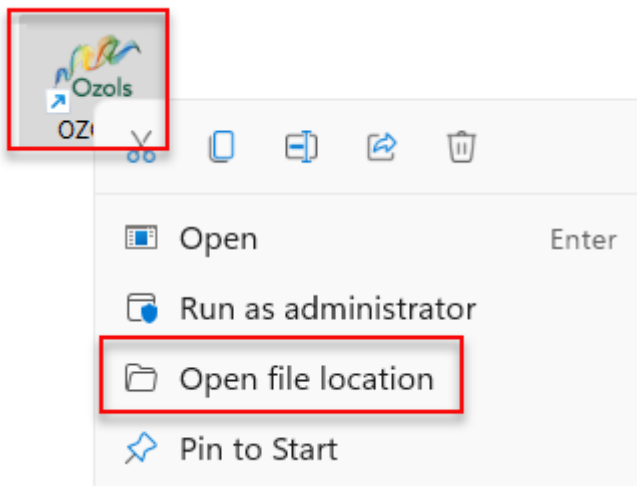
1) press search on the Windows desktop ;

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

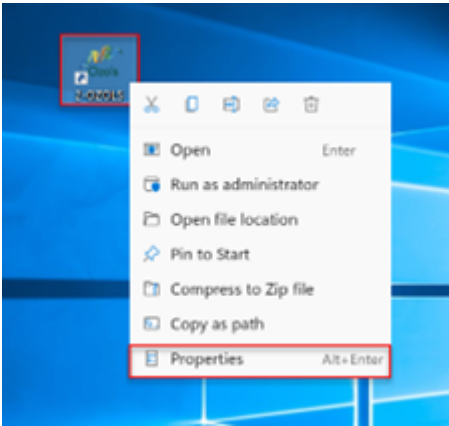


5) Create a **new Folder** with the name of the desired company.

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.

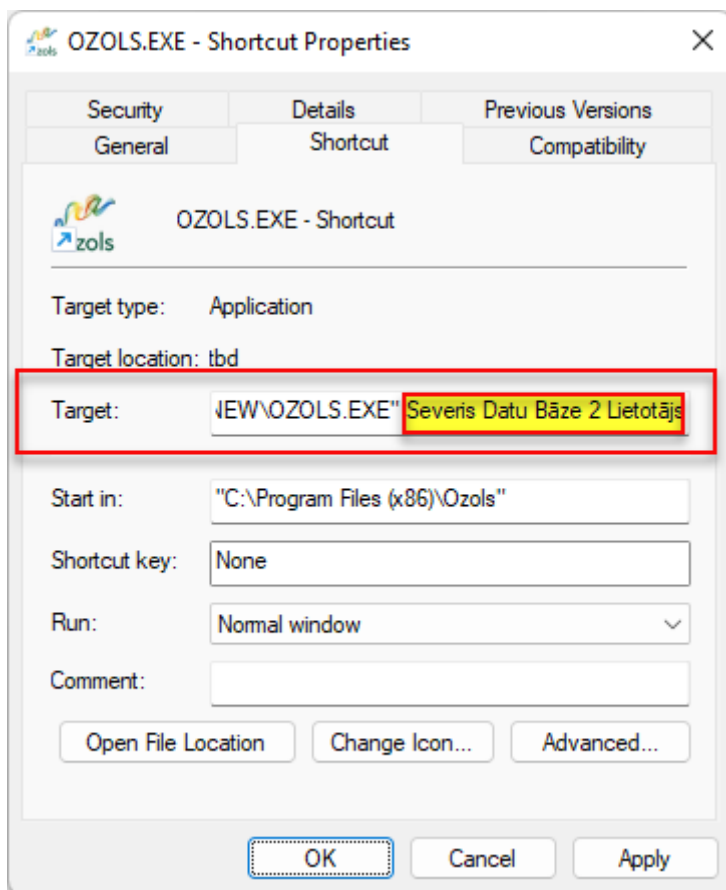
8) Open Functions with the right mouse button and select **Properties**.



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**

Date: **10.11.2019** | **06.11.2019** | **00:00** | **00:00** | **00:00** | **00:00**

Type: **Open Trip** | **No** | **7** | **7** | **7** | **7**

Carrier: **7W12** | **7W12** | **7W12** | **7W12** | **7W12** | **7W12**

Transp.manager: **7W12** | **7W12** | **7W12** | **7W12** | **7W12** | **7W12**

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

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

Trailer type: **7W12**

2 Add ferry

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

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: **1** | SMS

Ferry departs: **01.04.2022** | **00:00** | Register till: **01.04.2022** | **00:00** | Ferry arrives: **01.04.2022** | **00:00**

Passengers: **1** | Cabin: **1** | Lenght: **17** m | ADR: **1** | Provide electricity: **1**

Ferry operator: **A Logistics** | **LV-2108; Skulte; Skultes iela 1; GPS: 56.9185776 23.9567961**

Purchase price: **600.00** EUR | Invoice: **1**

Sale price: **0.00** EUR | Invoice: **Invoice is not created**

Notes: **1**

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

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 | HGK103/F2908 | A15 | | 600.00 | EUR | 600.00 | | | | | 1 |
| 21.09.2022 | Kap-Naant | 127000004022 | A202 | | 700.00 | EUR | 700.00 | | | | | 1 |
| 04.12.2019 | Nyn-Vent | HH 16076/19 12204 Tw14 | | 10 | 400.00 | EUR | 400.00 | | | | | 1 |
| 21.06.2019 | Riga-Stock | HH 16076/17 12204 Tw16 | | 10 | 250.00 | EUR | 250.00 | | 475.00 | | | 1 |
| 08.06.2022 | Riga-Stock | 0012204/196 Tw129 | | | 250.00 | EUR | 250.00 | | | | | 1 |
| 13.06.2022 | Tallin-Helsinki | 0012204/197 | | | 250.00 | EUR | 250.00 | | | | | 1 |
| 11.03.2022 | Klaip-K/hamn | 0011111 | | 10 | 250.00 | EUR | 250.00 | | | | | 1 |
| 10.06.2022 | Kap-Naant | 12120000770402 | 1207 | | 250.00 | EUR | 250.00 | | | | | 1 |
| 20.04.2022 | Riga-Stock | 12120000770402 | 1207 | | 250.00 | EUR | 250.00 | | | | | 1 |
| 10.05.2022 | Tallin-Helsinki | HGK103/F2908 | 14020 | 12 | 100.00 | EUR | 100.00 | | | | | 1 |
| 10.05.2022 | Tallin-Helsinki | 0012204/196 | | | 100.00 | EUR | 100.00 | | | | | 1 |
| 01.07.2019 | Klaip-K/hamn | HH 12204/196 12204 Tw17 | | 10 | 75.00 | EUR | 75.00 | | | | | 1 |

Ferry tickets

?

Delete record "01.04.2022"?

6

Yes

No