

# 3) Planning of shipment

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# Trip/ spedition basic principles

There are two approaches to organizing cargo shipment in OZOLS TMS:

1. **Creates a new Trip/spedition** for the cargo: One or more cargoes for which a transport has to be organised.
2. **Add Cargoes to a Trip/spedition:** cargoes are added to a transport on a specific route.

Cargo transportation can be provided by:

1. **Spedition** – Expedition, or sale of cargo
2. **Agreement** – Trip with a long-term contract carrier
3. **Own trip** – Trip with own transport
4. **Domestic** – Local transportation

The planning of a new **trip/spedition** can be started in two ways:

1. In the created **client order** with the command button **Add trip/exp.**
2. By Pressing the **F7** function key on the keyboard - opens the **New Trip/spedition window**

**Additional services** such as Cargo **Insurance, Handling Services, Export Declaration, Customs Services, Idle Time, Warehousing**, etc. are also registered as Trip/spedition. Find out more here.. [Learn more here.](#)

# New Expedition

## 1. Open Client order window

**OZOLS > Freight transportation > Documents > Client orders > [Open the required Order]**

1. Select the **cargo** for which the trip/spedition is to be created.
2. Press **Add spedition**.
3. Select **New** if creating a new trip/spedition.
4. Select **Existing** if the trip/spedition has already been created > A window opens where you select the corresponding trip.

Client order - DEMO - K10187

**Cargo** | Sent e-mails | Attachment(s) | Prepared CMR | Sell cargo | Status history

Order No. 10187 | Order date 05.04.2022 | Order type Cargo | ☐ Multibooking

Cargo manager: [Empty] | Client order No.: [Empty] | Status: Terminal [out]

Client: [Empty] | Contact Info: Uzars Juris7 | janis.veldre25@gmail.com

Agreed to load: ☐ 12.04.2022 from 00:00 To 00:00

Sender: [Empty] | Loading ref.: [Empty]

Loading address: [Empty] | SE, Vasteras, SPM 764780 16.5786

Agreed to deliver: ☐ 20.04.2022 from 00:00 To 00:00 | Delivered: [Empty] 00:00 | Took out No.: [Empty]

Receiver: [Empty] | Delivery ref.: [Empty]

Delivery address: [Empty] | SE, Muurla, SPM 90.2017 23.2085

Direction: Transfer | Trailer type: [Empty] | Loading type: [Empty] | ☐ With declaration

Notes for carrier: [Empty] | Internal notes: [Empty]

Income from client: 150.00 EUR | Payment: 30 days | VAT Rate: 21% | Send invoices: By e-mail | Send POD: By e-mail

Invoice: Not order invoice created!

Packs	Size	Bruto	Ldm	Volume	Charg.wt.	Cargo description
3 Box	L:1.00 W:0.80 H:0.70	1.00	1.680	1850.00		
5 EPLL	L:1.20 W:0.80 H:1.80	2.00	8.640	3700.00		

8pcs; 3.00ldm; 0.00kg; 10.32m3; Chargeable weight: 5550.00kg;

#	Service	Income	Trip/Exp.no.	Transport No.	Load.date	Delivery.d	Invoice No.	Expence	POD	Carrier
10	SE, Vasteras -> FI, Muurla	140.00	-		12.04.2022	20.04.2022		*		
	- 7510	10.00	-		12.04.2022	20.04.2022	9K-R		*	

POD No.: [Empty] | ☐ POD received

Total Income: 150.00, Total costs: 0.00, Profit: 150.00  
Price/LDM: 50.00; Profit/LDM: 50.00

Saved: 09.08.2022 12:24 demo

Buttons: Save, Add spedition, New, Existing

## 2. The window **New - Trip/spedition** opens

1. Choose the **type of carrier: Spedition** - classic expedition (cargo sale)

**You can also create Trip/spedition:**

- **Agreement** - Long-term contract with the carrier
- **Own trip** - Trip with own transport
- **Domestic**

## - Local transport

2. If the haulier's car has already carried cargo, entering its number will automatically fill in the Carrier name.
3. Enter the Carrier company name, if you have it. Double-click to enter a new Carrier.
4. If you know, enter Carrier Manager. Double-click to enter a new one.
5. Carrier Price: The amount that will be paid to the Carrier. Specify the VAT rate and payment term
6. Mark the trailer type (For example – TENT)
7. Internal notes if needed
8. Save and close. With that, the Expedition is created.

The screenshot shows the 'New - Trip/Spedition' window with the following fields and actions highlighted by numbered red boxes:

- 1. Type: Spedition
- 2. Truck/Trailer: HH 1234/RR 1234
- 3. Carrier: Demo
- 4. Carriers manager: Ozolnieks Edgar
- 5. Price for carrier: 500.00 EUR EU, Payment term: 30 days, Send documents on: Company common e-mail
- 6. Trailer type: TENT
- 7. Internal notes
- 8. Save button

Next steps:

**Transport Order** to cargo carrier

**Invoice** to Client

# Adding a ferry ticket

Ferry tickets can be added to a **specific trip** or sold as a **additional service**

## 1. Adding a ferry ticket to a Trip/Spedition

1) Open the Trip/Spedition to which you need to add ferry tickets:

[image-1651154858190.png](#)

2) Select **Export ferry** as needed and click **Add ferry** to add ferry or open an existing one;

[image-1651154858190.png](#)

3) Select **Import ferry** as needed and press **Open ferry** to add ferry or open an existing one.

1 Trip/Spedition: TW29

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

Previous trip: [ ] Next trip: [Not planned] New

Cargo info: Load addr.: 2; Del. addr.: 2; 4.00 ldm (EXP: 4.00) 0.00 kg Transport type: Road

Date: 04.08.2022 Start: 08.08.2022 08:00 end: 00:00 Status: Eksport

Type: Own Trip No. W 29 Truck No: GG123 Trailer: K566

Carrier: Demo Driver: Ozolnieks Edgars

Transp. manager: Demo

Export ferry: 08.08.2022 12:30 - 09.08.2022 17:20 Riga-Stock, Expenses: 350.00 EUR

Import ferry: [ ]

Trailer type: TENT Show temperature: no klienta pasūtījumiem from 0 to 0 St

Add ferry

Open ferry 08.08.2022 12:30; Riga-Stock

L#	D#	Cargo	Description	Client	LDM	Load date	Unload d.	Income	Curr.	Expense	Loc. deliv.	Profit	POD	Manager	Functions
1	40	+K10208-EXP LV-DEMO terminal -> LV-DEMCuznemums01			4.00	08.08.2022	12.08.2022 12	1200.00	EUR	1110.00		90.00	*	Demc	

## 2. Filling in the Ferry window:

1) **Attach ferry to a trip** : complete if the ferry tickets are for a specific Trip;

2) **Car/Trailer number: mandatory**;

3) Ferry route: **mandatory**; With a double click, the **Ferry Route** window opens, where you enter [image-1651154764507](#)

the required information. If the information has already been entered, press **Image not found** and select

previously defined ferry;

4) **!!! IMPORTANT:** indicate the direction of the ferry - **Import, Export or Crossing** ;

5) **Sale price:** This window is filled in if the ferry ticket is not attributed to Trip, but is sold as additional service for which an invoice must be issued;

6) **SMS to the driver:** copy Ferry ticket information for sending to the driver (Clipboard)

7) When the **Invoice** for tickets is available, add it by clicking here ▼;

- The other fields are filled depending on the available information.

The image shows two overlapping software windows. The top window is titled 'Ferry' and contains various input fields for ferry booking. The bottom window is titled 'Ferry route' and contains fields for route details. Red boxes and numbers 1 through 7 highlight specific fields in both windows.

**Ferry Window Fields:**

- 1: Attach ferry to Trip (TW29)
- 2: Truck/Trailer No (GG123/K566)
- 3: Ferry line (Riga-Stock)
- 4: Ferry operator (Shipline)
- 5: Purchase price (350.00 EUR)
- 6: SMS checkbox
- 7: Invoice dropdown (Invoice is not created)

**Ferry route Window Fields:**

- 1: Name (Riga-Stock)
- 2: Web page
- 3: Ferry line
- 4: Default price
- 5: Import/Export/Local radio buttons (Export is selected)

[How to add Invoice for Ferry tickets?](#)

# What is the benefit of linking to a navigation system?

## 1. **Trip Planning Window Information:**

- Access to the truck's location (postcode and city).
- Real-time data on the time and distance to the next loading address.
- Visual representation of the trip route on the map, along with the machine's current location.
- Details about the start time of the working day and the hours driven on that day.
- Automatic load status updates.
- When approaching a loading or delivery address, the load status is changed to "Approaching loading address" or "Approaching delivery address."
- Upon arrival at a loading or delivery address, the load status is automatically updated to "Arrived at loading address" or "Arrived at delivery address."
- Monitoring the duration the truck has spent at loading or delivery addresses.
- GPS date and time of arrival at the loading address.

## 2. **Driver App:**

- Display of the truck's current location.
- Information on the time and distance to the next stacking address.

## 3. **Customer Portal:**

- Customers can track real-time status changes online.
- Option to view the location of the load or machine.

The truck utilizes the MAPON navigation system, enabling features such as:

- Recording trip speedometer readings at the beginning and end of each trip, along with GPS-

tracked kilometers traveled during the trip.

- Calculation of allowances per trip based on the country.
- Assignment of the correct driver to each vehicle at the start of the day through the Ozols system.

This integration with the navigation system enhances operational efficiency and provides valuable insights into the status and progress of deliveries.