

# Basic principles

- Main window layout and commands
- Open Windows
- Shortcuts to frequently used forms
- Filter
- Search window
- Recording and editing history
- Columns - adjusting the design and content
- Adjusting Column width
- Customize column content and order
- Defined columns
- Multiselect - highlight the desired rows
- Calculator - sums of highlighted rows
- Print or export selected data to Excel

# Main window layout and commands

## Browser

The **Operation Mode Browser** is displayed on the left side of the screen and is used to display the available working modes. The layout of the working modes is similar to the main menu.

The screenshot shows the 'Client orders - Ozols' application window. The interface includes a menu bar (Data, Text, Documents, Reports, Lists, Izlase, Configuration, Window, Help (?)), a toolbar with icons for Browser, Back, Forward, New, Confirm, Filter, Delete, Functions, Relate, Multiselect, Print, Mail, View, Book, Columns, and Exit. A search bar is located above the main data table. The 'Operation mode Browser' is a tree view on the left side, showing a hierarchy of folders like Warnings, My favorites, E-mail, Finances, Ledger, Common lists, Configuration, Contacts, Data exchange with bank, Freight Forwarding, Documents, Lists, New, Reports, Tools, Payments, and Warehouse. The main window displays a table with columns: No., Client, Load date, Loading address, Recipient, Delivery address, Income, and Invoice No. The table contains 250 records. A 'Summary bar' at the bottom right shows totals: 93 184.34 and 397 713.

No.	Client	Load date	Loading address	Recipient	Delivery address	Income	Invoice No.
1	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
2	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
3	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
4	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
5	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
6	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
7	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
8	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
9	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
10	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
11	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
12	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
13	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
14	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
15	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
16	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
17	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
18	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
19	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
20	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
21	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
22	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
23	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
24	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		
25	Wagon	14.03.2011	LA-1000, Karkava, Karkava, Karkava	LA-1000, Karkava, Karkava, Karkava	100.00		

The operating modes are displayed hierarchically in the browser. To activate the required action, you must click on the entry to open the lowest level operating modes. For example, by clicking on the Customer Orders command, the Customer Orders overview opens on the right side in the Main Window. To open the next required operating mode, click on it in the browser and the specified operating mode will open in the Main Window.

You can hide or show the browser using toolbar commands  or the  button.

# Main menu

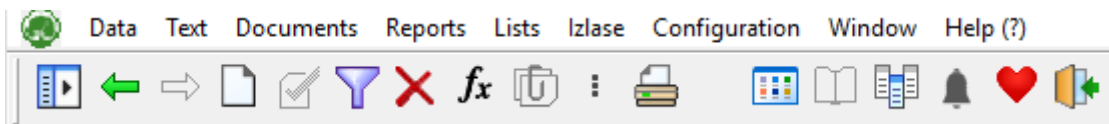
Activation of all program activities is available in the main menu. The main menu is available for the entire duration of the computer program. Using the main menu is similar to using Windows programs.

The operating modes in the program are grouped under the menus Data, Text, Documents, Reports, Lists, Favorites, Configuration, Window, Help. All these operating modes can also be found using the Browser.

The most commonly used main menu commands are also available from the toolbar of your computer program.

# Toolbar

The toolbar is a graphical layout of command buttons that allows you to perform the required action faster and more clearly.



**If the toolbar is not visible** , it can be set from the menu using the **MENU**

► **Configuration** ► **Toolbar** ► **Commands**

## Customize Toolbar

**The toolbar can be configured.** Place the mouse over the Toolbar. Click on the right button and select **Customize Toolbar**.



In list show first: 10; k records

Explorer Group by No. Client Load.date Loading address Recipient Del

- Warnings
- My favorites
  - Ienākošie rēķini
  - Izejošie rēķini
  - Klientu pasūtījumi
  - Partneri
  - Reisi/Ekspedīcijas
- E-mail
- Finances
- Ledger
- Common lists
- Configuration
- Contacts
- Data exchange with bank
- Freight Forwarding
  - Configuration
  - Documents
  - Lists
  - New
  - Reports
  - Tools
- Payments
- Tools
- Warehouse

Rīku joslas pielāgošana

**Available toolbar commands:**

- Open
- Copy
- Search
- Annul
- Take
- Record info
- Partner info
- Truck info
- Refresh
- Save

Add->

<-Exclude

Standard commands

**Toolbar commands:**

- Browser
- Back
- Forward
- New
- Confirm
- Filter
- Delete
- Functions
- Relate
- Multiselect
- Print
- Mail

Text: Without text

Icons: Large icons

Above Below

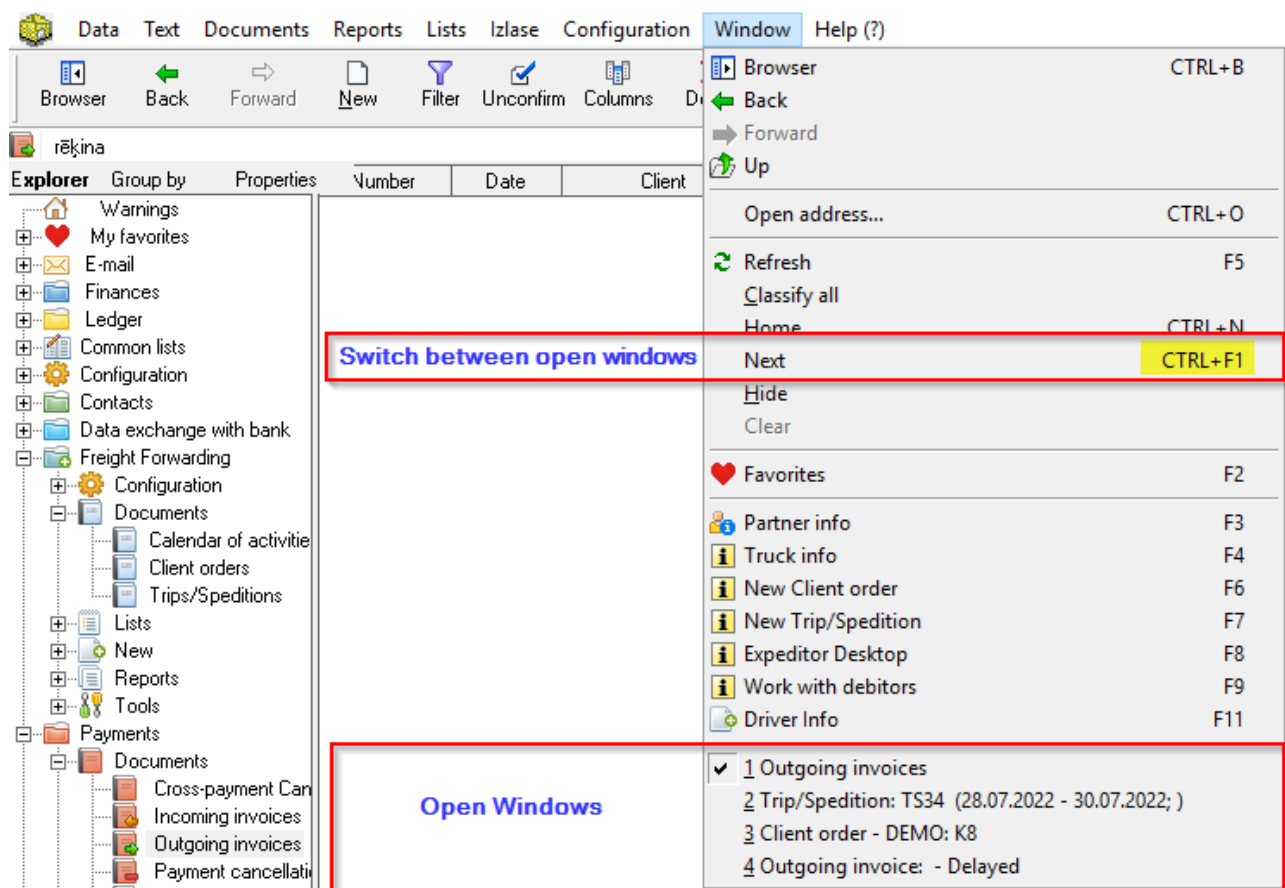
Save Close

55 Commands 18 Commands

# Open Windows

Sometimes one of the open windows disappears because it has fallen behind another window. To find it:

1. To switch between open windows, press **Ctrl+F1**
2. Or from the menu, press **Window**
3. A list of **open windows** is shown **at the bottom of this window**. To open a window, click on it with the mouse.



# Shortcuts to frequently used forms

1. [Function keys](#)
2. [Opened windows and Function key summary](#)
3. [General key combinations in OZOLS TMS](#)

## 1. Function keys

The function keys allow you to quickly open one of the OZOLS TMS sections








### The most frequently used Function keys:

**F6** - New Customer **order**

**F7** - New **Voyage/Expedition**

**F8** - **Forwarder** 's desktop

Function keys	Explanation
F2	♥ My favorites - a list of working modes compiled by myself
F3	👤 Information card of the cooperation partner
F4	📄 Machine/Trailer Details
F5	🔄 Redrawing (refreshing) information in the open window

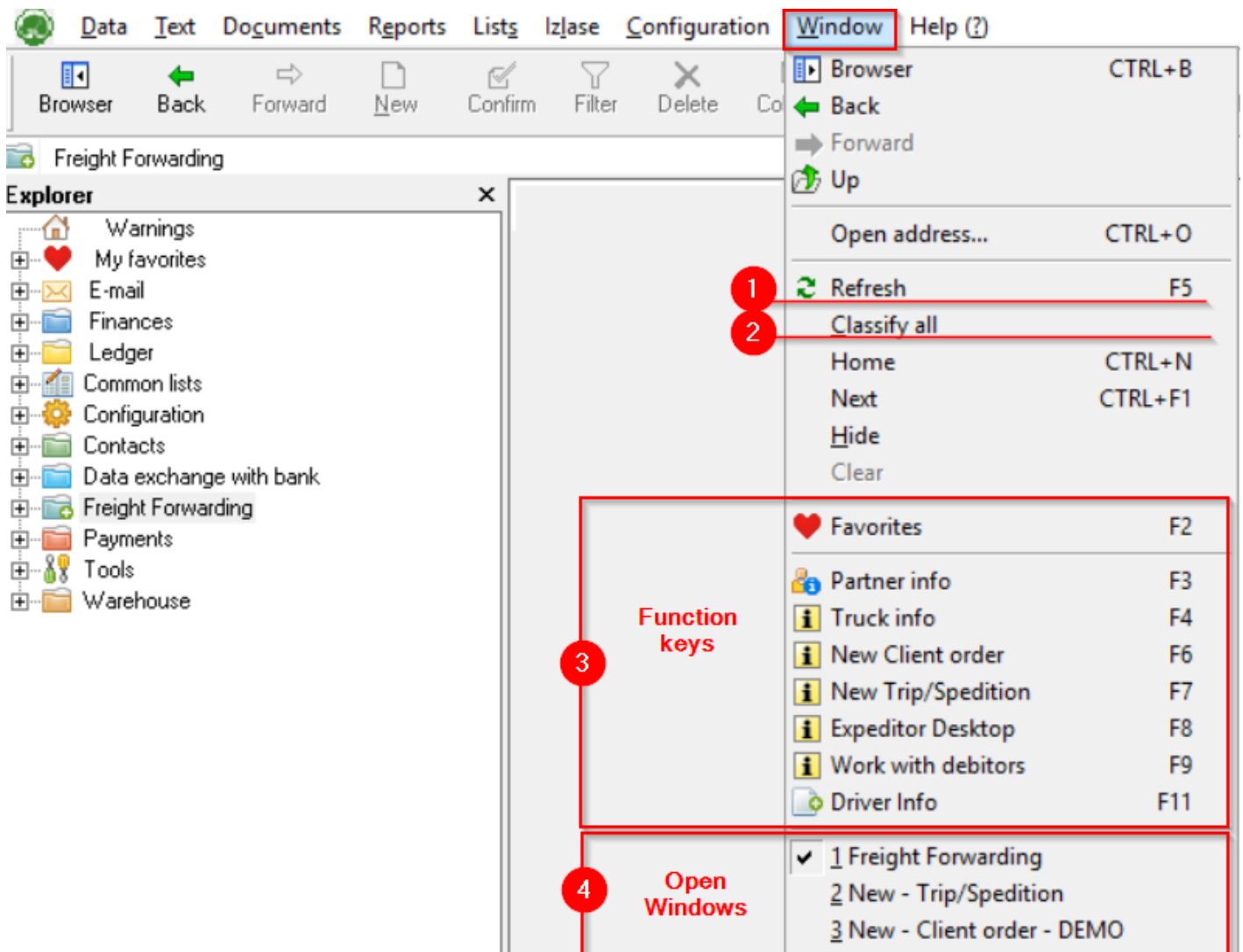
F6	 New Customer order
F7	 New Voyage/Expedition
F8	 Forwarder desktop
F9	Work with debtors
F11	 Saving and adding information
F12	 Retention and Closure of Information

If the Function keys **do not work** , press **Fn + Esc on the keyboard**

## 2. Opened windows and Function key summary

In main menu under **Window** you can find Opened windows and Function key shortcuts and summary

1. **Update data** in the currently open window **(F5)**
2. **Arrange all** creates a cascade of open windows. This allows you to quickly switch between open windows
3. Shortcuts to **function keys**
4. Opened windows - Helps to find collapsed windows



### 3. General key combinations in OZOLS TMS

Key combinations	Explanation
Tab	Navigating from field to field
Shift+Tab	Navigating from field to field backwards

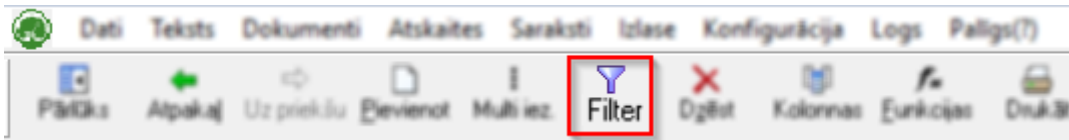


Ctrl+Tab	Switch between form pages
Alt+Arrow Down	Opens a drop-down list for selecting a record
Shift+Arrow Down	Opens a drop-down extended list for selecting a record
Shift+Arrow Up	Opens the selected drop-down record or, if no record is selected, creates a new record

Alt+ underlined letter	The mouse cursor moves to the underlined label field containing the underlined letter
Escape	Cancels changes to the open form
Enter	Saves open form data
Ctrl+G	Book document
Ctrl+P	Prints the selected document

# Filter

Almost all sections of OZOLS have the possibility to set a **Filter** for selecting the data you need. The **Filter** is located in the toolbar.



If all records are not displayed when opening one of the OZOLZ TMS sections, make sure that one of the filters has not been **turned on from the previous use**.

- To find a document by number, it is enough to enter **the last two digits of the number**.
- **% sign** in front of the entry enables search for partial number or name.
- To select **several order numbers** , enter them in the "Search number(s)" field, **separated by a comma**.
- A **checkmark** ☒ turns on the specific filter

Client orders

Template

[None]

☒ Search No.(s)
 %10, 8

☒ Search
 %ND3393

☒ General status
 Not delivered

☐ Transport type
 [ ]

☒ Status
 Delayed payment

☐ Errors in data
 [ ]

☒ Outgoing invoice
 No invoice

☒ Incoming invoice
 Not linked

☒ Cargo manager
 Demo

☐ Client manager
 [ ]

☐ Client
 [ ]

☐ Carrier
 [ ]

☐ Sender
 [ ]

☐ Consignee
 [ ]

☐ Load.addr.postal code
 [ ]

☐ Deliv.addr.post.code
 [ ]

☐ Direction
 Export

☐ Temp.regime
 [ ]

☐ ADR
 [ ]

☐ Canceled orders
 [ ]

☐ Warnings
 [ ]

☐ POD
 Not

☒ Date
 order
 Current and Previous Month
 from 01.08.2022 to 30.09.2022

☒ Trip type
 Own Trip
 [ ] Truck
 [ ]

In list show first

10 k records

Prepare

Cancel

**The additional Search** function built into the filter on the right side of window allows you to enter additional search criteria. More about search options [here](#).

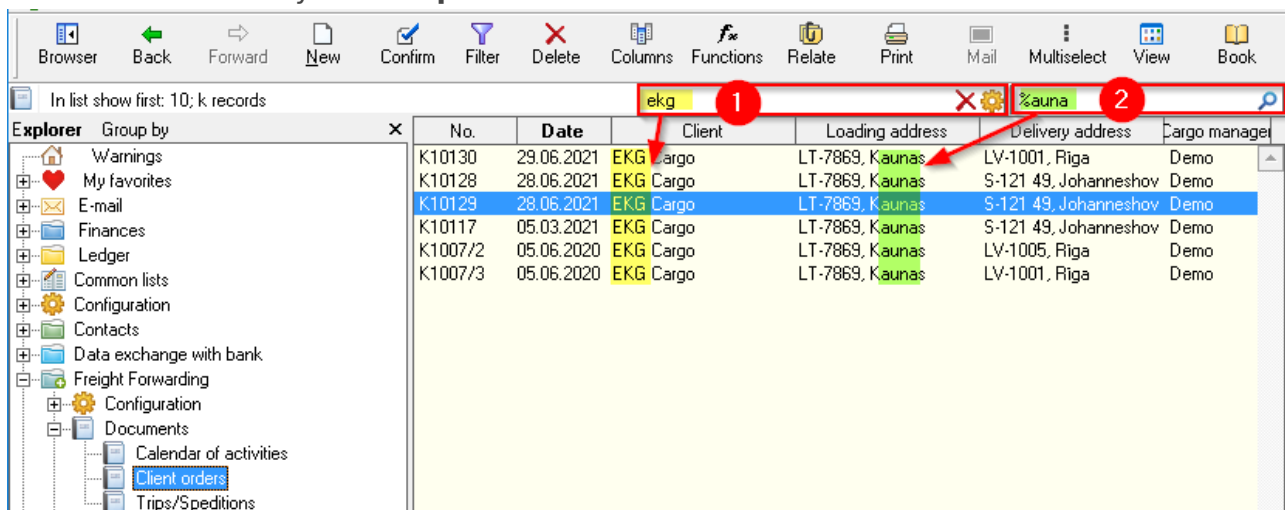
# Search window

## How the search window works:

- If you search for, for example, "**ECG**" the program will select all records where the field **name starts with** "ECG"
- If you search " % **ECG**" the program will select all records where **the field record contains** "ECG"
- If you search for " ! "ECG" program will select all records where the field name **does not start with** "ECG"
- If there are spelling differences, the **unknown letter** is replaced by an underscore " \_ ". For example, you can search for the word "Vilnius" as "Viln\_s"
- Square brackets [ ] are used to search for multiple **possible letters** . For example, searching for " [ CS ] heryl" will find the result for both Cheryl and Sheryl

## Two search windows:

1. The data is searched in the OZOLS **database**;
2. Data is searched only in **the open table**.



# Recording and editing history

Almost all records or editing made in the OZOLS TMS are logged and their history can be viewed.

## Record history information:

1. **when and who added** the record ;
2. **when and who opened/viewed** the record ;
3. when and by whom the record has been **edited** and specifically **what changes** have been made.

## To view Record history:

1. Open the desired window and **press the key combination Ctrl+i**
2. Record info displays which user created, edited or viewed the data
3. If the text "**Edited**" is next to the record, then you can open additional information about the history of the record with a double click.

Record ID	364	
Record created	demo (Demo)	03.05.2022 12:28:54
Record edited	demo (Demo)	10.05.2022 16:53:22

### Record history

02.09.2022 16:13:41	demo (Demo)	MY2	Viewed
10.05.2022 15:12:07	demo (Demo)	MY2	Viewed
10.05.2022 08:41:29	demo (Demo)	MY2	Viewed
10.05.2022 08:40:21	demo (Demo)	159.148.86.71	Edited; Delivered to Terminal
10.05.2022 08:40:13	demo (Demo)	MY2	Viewed
10.05.2022 08:40:05			
10.05.2022 08:39:50			
10.05.2022 08:39:50			
10.05.2022 08:39:43			
10.05.2022 08:39:30			
09.05.2022 15:32:38			
09.05.2022 15:31:12			
09.05.2022 15:30:20			
09.05.2022 15:12:56			

### Record info - Client order

Record	364	10.05.2022 08:40:21	demo (Demo)
Description	Delivered to Terminal: 09.05.2022 00:00 -> 01.01.1900 00:00		

# Columns - adjusting the design and content

Read about adjusting the design and content in the following sections:


1. [How to adjust column content and order?](#)
2. [How to change column width?](#)
3. [How to put a colleague's column layout in your Ozols?](#)
4. [How to quickly change the appearance of columns? - \*\*Defined columns\*\*](#)



# Adjusting Column width

To change the column width:

Open the OZOLS TMS table where you want to change the width of the columns.

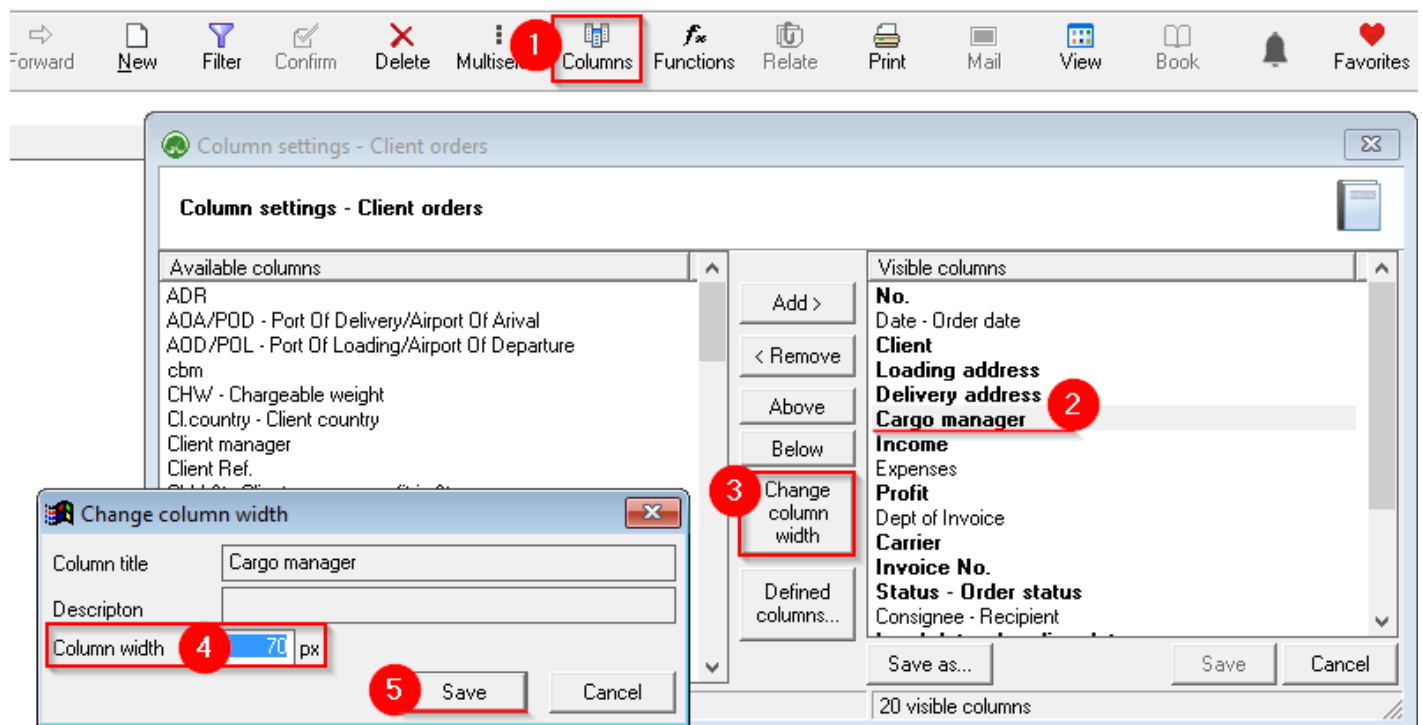
1. In the toolbar, select the **Columns** toolbar button  or press **Ctrl+K**. The **Column settings** window will open

2. In the **Visible columns** section, select which column width you want to change

3. Press the **Change column width** button

4. In the **Column width** field, write the desired column width in pixels

(informative: 1px  $\approx$  0.26mm; 100px  $\approx$  2.6cm)



## See also:

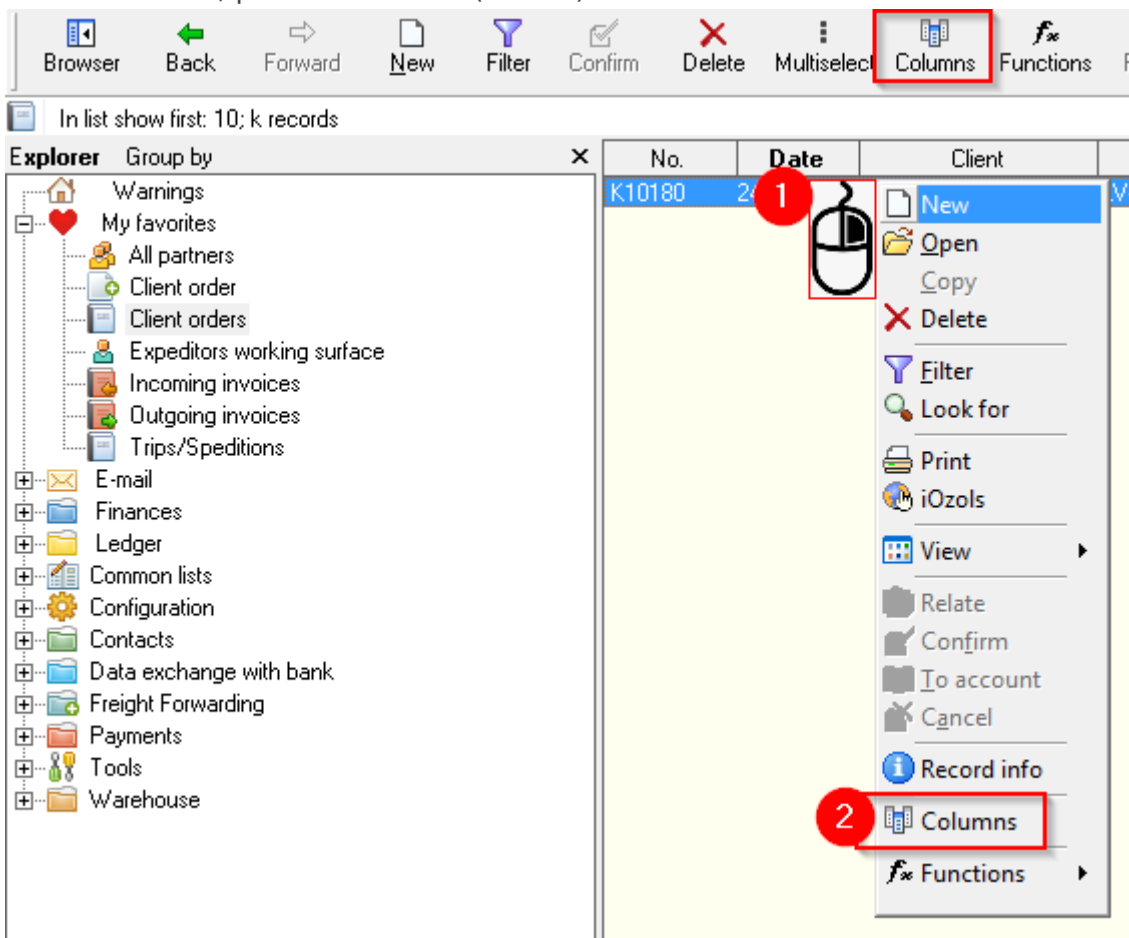
- 1) [Customize table column content and order](#)
- 2) [Defined columns](#)



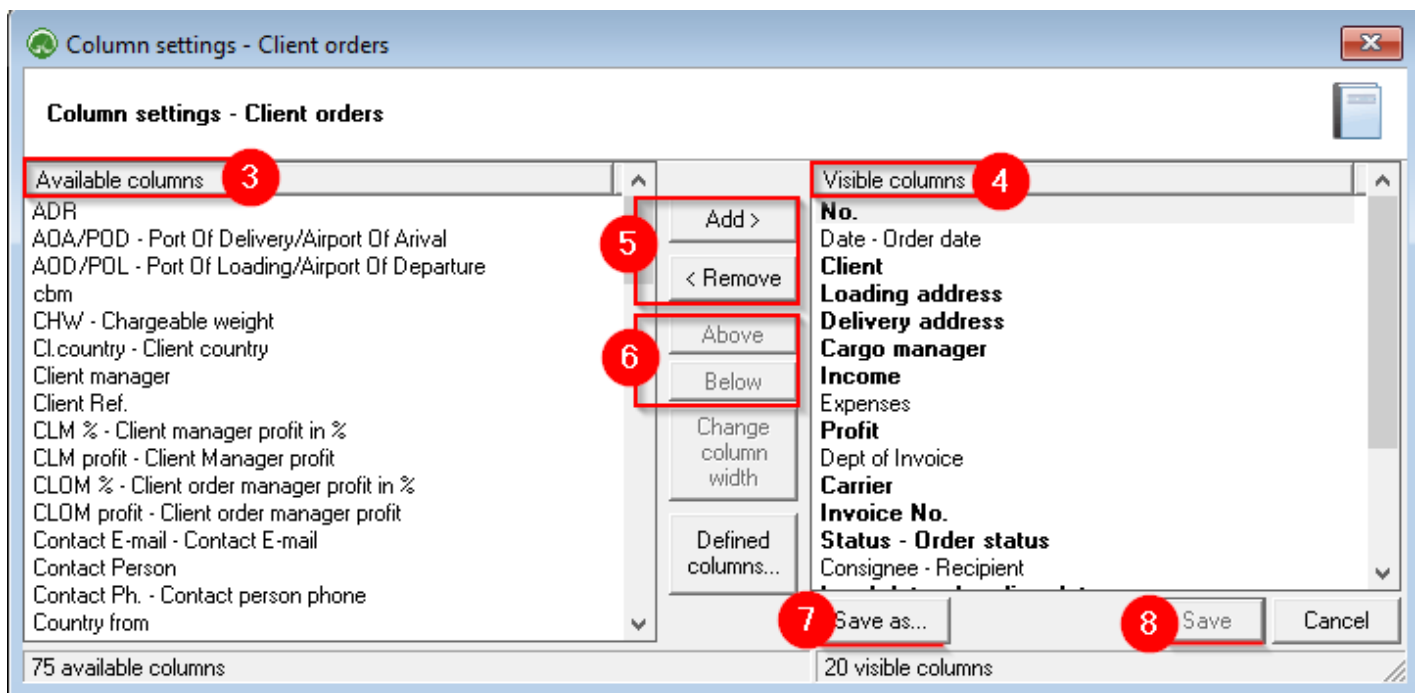
# Customize column content and order

Open the table you want to make changes to

1. **Press the right mouse button** on any of the rows in the table
2. Or in the menu, press **Columns** (Ctrl+K)



3. Columns are divided into **Available columns (possibly included in the table)** and
4. **Visible columns (already included in the table)**
5. Mark with the “mouse” the desired column on one or the other side and press the **Add** or **Remove buttons** as needed to adjust the table content
6. Change the order of the columns with the **Up** or **Down buttons** . Moving Up moves the column to the left in the table. Moving Below moves the column to the right in the table.




**The Save As...** button allows you to save the selected layout as defined. This means that both you and other users of your company's OZOLS database will be able to open this table layout.

#### See also:

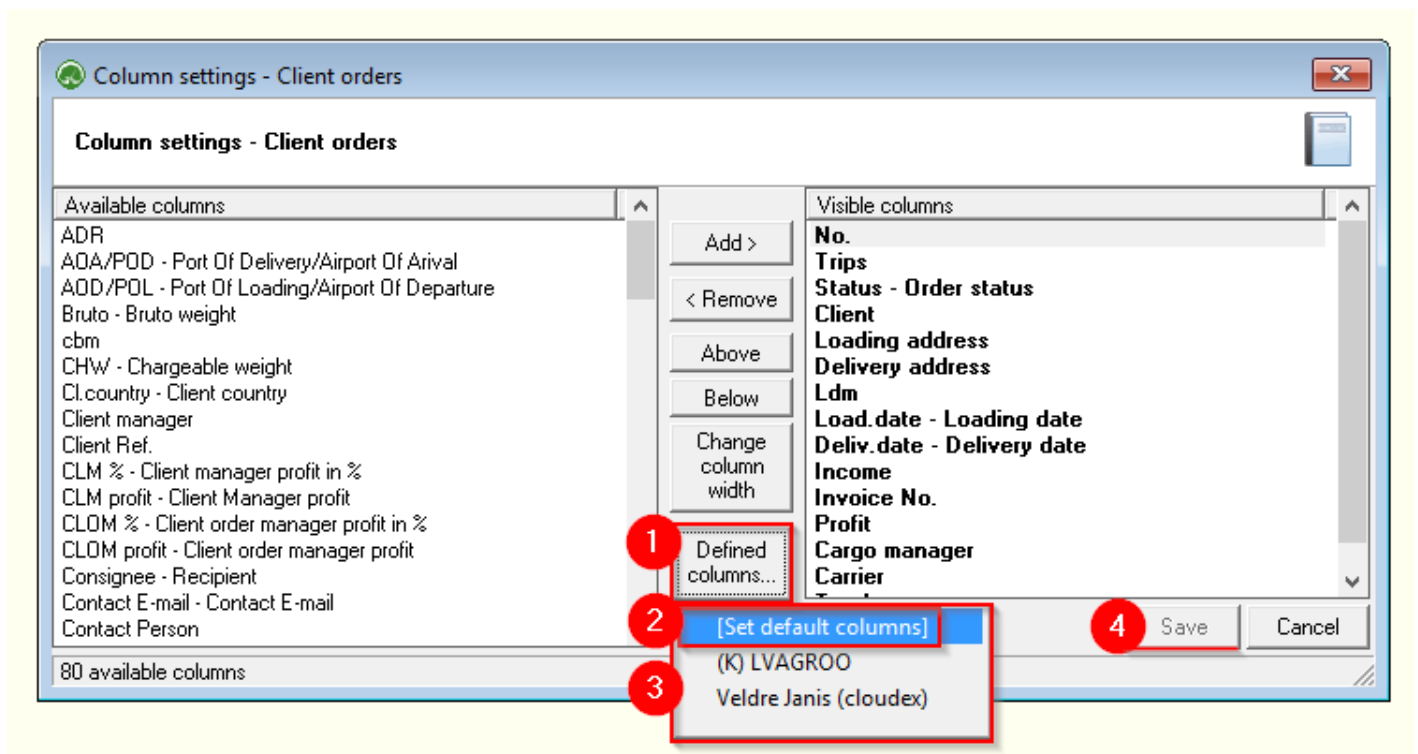
- 1) Change column width
- 2) Defined columns

# Defined columns

**Defined columns** allow you to save the table column layout you create with a name. Columns saved in this way are easily available both for their own needs and for installation by other users. So, for example, defined column selections can be created within the company, which can be easily installed by new employees.

First, open the table where you want to install the defined columns. Select the  **Columns** button on the toolbar ( Ctrl+K )

1. Click the **Defined Columns...** button.
2. **Default columns** - layout recommended by OZOLS TMS
3. **Columns defined** in your company
4. Click **Save** to activate the defined columns

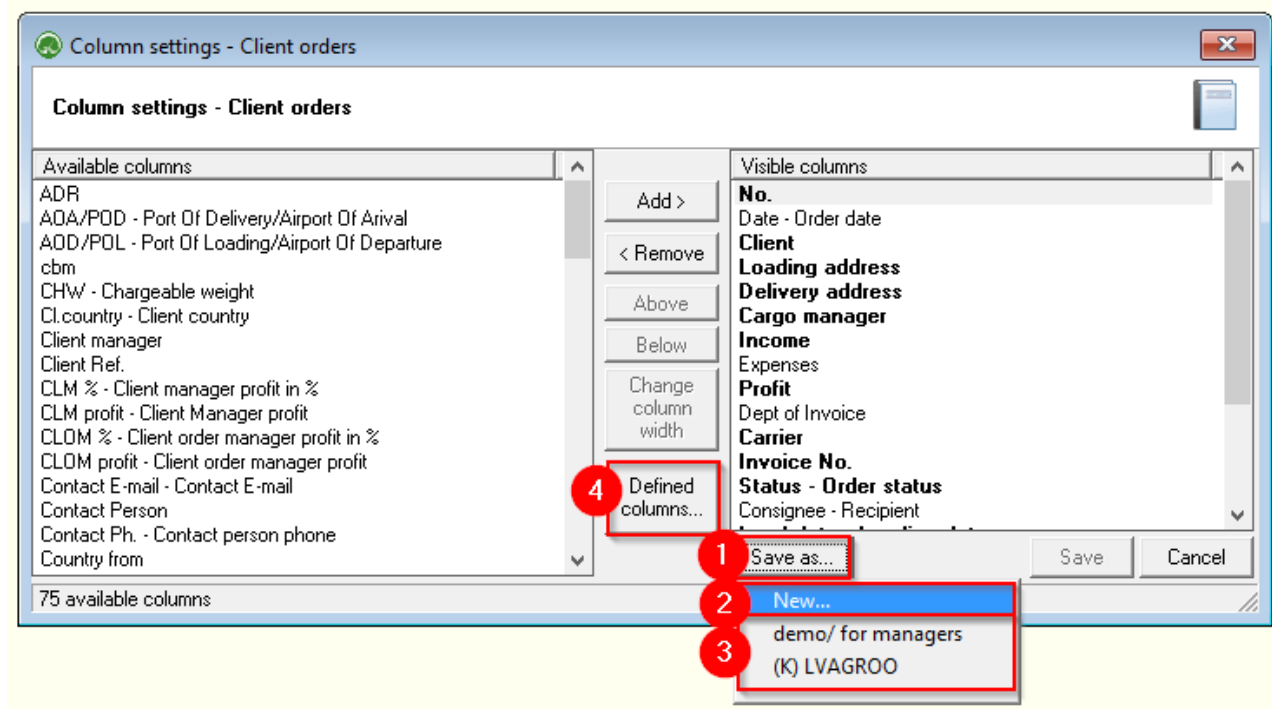


## To create a selection of Defined Columns

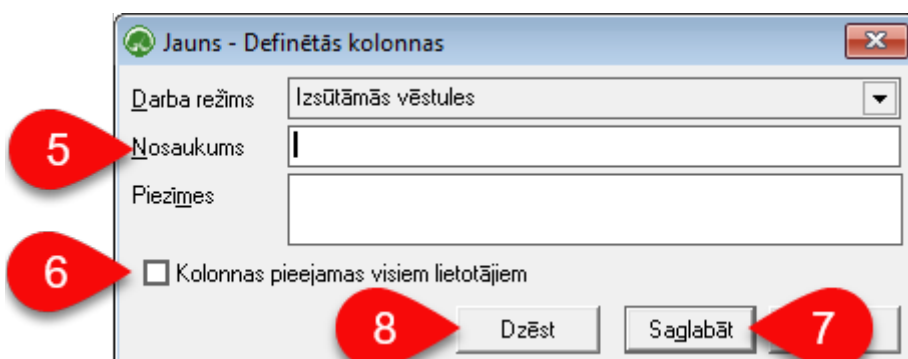
1. Adjust the columns shown in the table as needed ( [tutorial here](#) ) and press the button

### Save as...

2. To create a New selection of defined columns, press **New...**
3. To edit or delete previously saved defined columns, select **by name**
4. To open a selection of predefined columns, click the **Defined Columns... button**.




5. Gives a name to a selection of defined columns
6. Tick if you want the columns to be available to all users. If the "tick" is not placed, then only you will see this selection
7. Press save. The Defined Columns you have created can be found by clicking the **Defined Columns... button**.
8. If you need to delete one of the previously created selections of Defined columns, open it (5) and press the **Delete button**

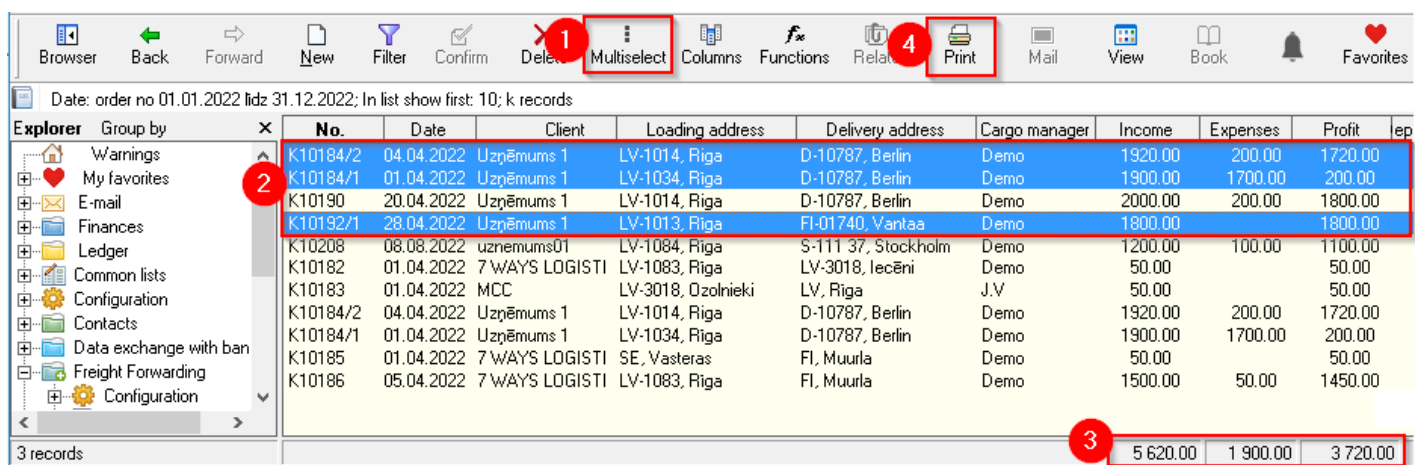


The Defined Columns you created can be found by clicking the **Defined Columns** button

# Multiselect - highlight the desired rows

Multiselect is used when it is necessary to select individual rows in random order. such as cargo and add to the trip.

- 1) In the toolbar, select **Multi-select**. ( **Ctrl+Y**)
- 2) Then, similarly to Excel, holding down the **Ctrl** or **Shift** keys with the "mouse" mark the desired rows
- 3) The marked rows depending on the open window:
  - The marked loads on the freight forwarder's desktop can be added to the marked flight
  - [Calculator](#) - the sums of the marked lines
  - [Print or export to Excel](#)
  - Depending on the window, additional options are available by pressing the Functions command button 



No.	Date	Client	Loading address	Delivery address	Cargo manager	Income	Expenses	Profit	ep
K10184/2	04.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	1920.00	200.00	1720.00	
K10184/1	01.04.2022	Uzņēmums 1	LV-1034, Rīga	D-10787, Berlin	Demo	1900.00	1700.00	200.00	
K10190	20.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	2000.00	200.00	1800.00	
K10192/1	28.04.2022	Uzņēmums 1	LV-1013, Rīga	FI-01740, Vantaa	Demo	1800.00		1800.00	
K10208	08.08.2022	uznemums01	LV-1084, Rīga	S-111 37, Stockholm	Demo	1200.00	100.00	1100.00	
K10182	01.04.2022	7 WAYS LOGISTI	LV-1083, Rīga	LV-3018, Iecēni	Demo	50.00		50.00	
K10183	01.04.2022	MCC	LV-3018, Ozolnieki	LV, Rīga	J.V	50.00		50.00	
K10184/2	04.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	1920.00	200.00	1720.00	
K10184/1	01.04.2022	Uzņēmums 1	LV-1034, Rīga	D-10787, Berlin	Demo	1900.00	1700.00	200.00	
K10185	01.04.2022	7 WAYS LOGISTI	SE, Vasteras	FI, Muurla	Demo	50.00		50.00	
K10186	05.04.2022	7 WAYS LOGISTI	LV-1083, Rīga	FI, Muurla	Demo	1500.00	50.00	1450.00	
						5 620.00	1 900.00	3 720.00	

# Calculator - sums of highlighted rows

OZOLS TMS allows you to select individual rows in the table in order to sum the numbers in these rows.

1. In the toolbar, select **Multi Select.** (shortcut **Ctrl+Y**)
2. Then, similar to Excel, holding the **Ctrl** or **Shift** keys with the "mouse" selects the desired rows
3. **The sums of the highlighted rows are shown in the lower part of the table**

Date: order no 01.01.2022 līdz 31.12.2022; In list show first: 10; k records

Explorer	Group by	No.	Date	Client	Loading address	Delivery address	Cargo manager	Income	Expenses	Profit	ep
Warnings		K10184/2	04.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	1920.00	200.00	1720.00	
My favorites		K10184/1	01.04.2022	Uzņēmums 1	LV-1034, Rīga	D-10787, Berlin	Demo	1900.00	1700.00	200.00	
E-mail		K10190	20.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	2000.00	200.00	1800.00	
Finances		K10192/1	28.04.2022	Uzņēmums 1	LV-1013, Rīga	FI-01740, Vantaa	Demo	1800.00		1800.00	
Ledger		K10208	08.08.2022	uznemums01	LV-1084, Rīga	S-111 37, Stockholm	Demo	1200.00	100.00	1100.00	
Common lists		K10182	01.04.2022	7 WAYS LOGISTI	LV-1083, Rīga	LV-3018, Iecāni	Demo	50.00		50.00	
Configuration		K10183	01.04.2022	MCC	LV-3018, Ozolnieki	LV, Rīga	J.V	50.00		50.00	
Contacts		K10184/2	04.04.2022	Uzņēmums 1	LV-1014, Rīga	D-10787, Berlin	Demo	1920.00	200.00	1720.00	
Data exchange with ban		K10184/1	01.04.2022	Uzņēmums 1	LV-1034, Rīga	D-10787, Berlin	Demo	1900.00	1700.00	200.00	
Freight Forwarding		K10185	01.04.2022	7 WAYS LOGISTI	SE, Vasteras	FI, Muurla	Demo	50.00		50.00	
Configuration		K10186	05.04.2022	7 WAYS LOGISTI	LV-1083, Rīga	FI, Muurla	Demo	1500.00	50.00	1450.00	
3 records								5 620.00	1 900.00	3 720.00	

## See also:





1) Option to print or export highlighted rows **to Excel** . Press Print ④ and follow the instructions.

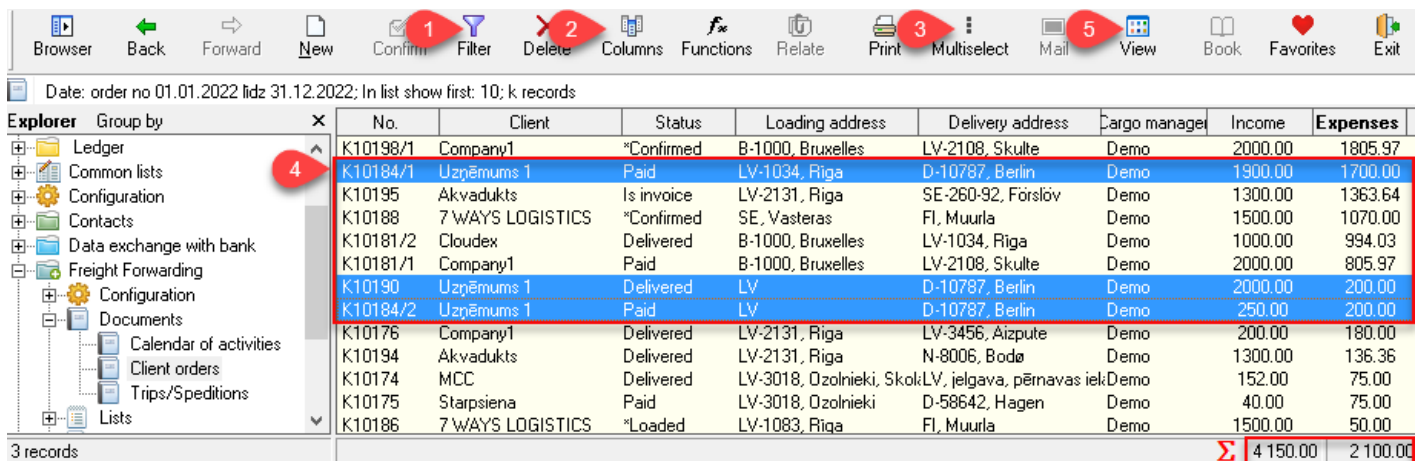
2) **Additional options**, depending on the opened window, by pressing the **Functions** command button



# Print or export selected data to Excel

Ozols TMS enables you to select the desired data in tables and print or save in Excel:

1. Choose **Filter**  (shortcut **Ctrl+F**) from the toolbar and select the data you want to select.
2. On the toolbar, choose **Columns**  (shortcut **Ctrl+K**) and choose the columns you need. There is an option to save this column selection in the **Defined Columns section**.
3. If you need to select only some rows, select **Multi select**  from the toolbar. (shortcut **Ctrl+Y**)
4. Similar to Excel, holding the **Ctrl** or **Shift** keys with the mouse selects the desired rows
5. Choose **View**  from the toolbar (shortcut **Ctrl+H**). At this point, a table with the selected data will be displayed in the main window.
6. **Right-** click anywhere in the newly created table and select **print or export to Excel**



Date: order no 01.01.2022 līdz 31.12.2022: In list show first: 10; k records

Explorer	Group by	No.	Client	Status	Loading address	Delivery address	Cargo manager	Income	Expenses
Ledger		K10198/1	Company1	*Confirmed	B-1000, Bruxelles	LV-2108, Skulte	Demo	2000.00	1805.97
Common lists		K10184/1	Uzpēdums 1	Paid	LV-1034, Riga	D-10787, Berlin	Demo	1900.00	1700.00
Configuration		K10195	Akvadukts	Is invoice	LV-2131, Riga	SE-260-92, Förslöv	Demo	1300.00	1363.64
Contacts		K10188	7 WAYS LOGISTICS	*Confirmed	SE, Vasteras	FI, Muurla	Demo	1500.00	1070.00
Data exchange with bank		K10181/2	Cloudex	Delivered	B-1000, Bruxelles	LV-1034, Riga	Demo	1000.00	994.03
Freight Forwarding		K10181/1	Company1	Paid	B-1000, Bruxelles	LV-2108, Skulte	Demo	2000.00	805.97
Configuration		K10190	Uzpēdums 1	Delivered	LV	D-10787, Berlin	Demo	2000.00	200.00
Documents		K10184/2	Uzpēdums 1	Paid	LV	D-10787, Berlin	Demo	250.00	200.00
Calendar of activities		K10176	Company1	Delivered	LV-2131, Riga	LV-3456, Aizpute	Demo	200.00	180.00
Client orders		K10194	Akvadukts	Delivered	LV-2131, Riga	N-8006, Bodø	Demo	1300.00	136.36
Trips/Speditions		K10174	MCC	Delivered	LV-3018, Ozolnieki, Skoki	LV, jelgava, pērnavas iek	Demo	152.00	75.00
Lists		K10175	Starpsiena	Paid	LV-3018, Ozolnieki	D-58642, Hagen	Demo	40.00	75.00
		K10186	7 WAYS LOGISTICS	*Loaded	LV-1083, Riga	FI, Muurla	Demo	1500.00	50.00
3 records								Σ 4 150.00	2 100.00

To send the data to a **printer** or export to **Excel**, click **View** and follow the instructions.

**See also:**

- 1) **Calculator** - sums of highlighted rows
- 2) **Column width**