

New Trip with own transport

1. Create a New Trip (F7)

Registration of a **new Trip** in OZOLS TMS is started by pressing the function key **F7** or **OZOLS > Freight transportation > New > Trip/Spedition**

1. Choose **Own trip - Trip with own transport** (see picture below)

OZOLS TMS also gives the opportunity to create:

- **Spedition** - Expedition (cargo sale)
- **Agreement** - long-term contract with the carrier
- **Domestic** - Local deliveries


2. Determine the **Status** :

- **Export**
- **Transfer/ Round trips**
- **Import**
- **Local deliveries**

- **When the trip is completed:** in this window you will change the Status to **delivered** or **invoices have been issued**

3. Enter **the Truck number** . If the specific Truck has already been entered in OZOLS TMS, when entering its number, both the driver's name and the Carrier company name are automatically filled in. This database can be also [imported](#).

If information about insurance and technical inspection has also been entered, OZOLS will warn about the expiration of the terms.
Open the truck registration card by double-clicking on the **Truck No.** field.


4. If necessary, enter the name of the driver and the name of the Carrier. In case of own trip, it will be your company name.
5. Add Export or Import **Ferry line** as needed by pressing . Instructions [here](#).
6. If necessary, write internal notes.

The screenshot shows the 'Trip/Spedition' window in the OZOLS TMS software. The window has a menu bar at the top with options like Finance, Calculations, Cargo delivery order, Drivers report, etc. The main area contains various input fields and a table. Red boxes and numbers 1-6 highlight specific areas:

- 1**: Points to the 'Type' dropdown menu, which is set to 'Own Trip'.
- 2**: Points to the 'Status' dropdown menu, which is set to 'Eksport'.
- 3**: Points to the 'Truck No' field, which contains 'GG123'.
- 4**: Points to the 'Driver' dropdown menu, which is set to 'Ozolnieks Edgars'.
- 5**: Points to the 'Export ferry' field, which contains '08.08.2022 12:30 - 09.08.2022 17:20 Riga-Stock, Expenses: 350.00 EUR'.
- 6**: Points to the 'Internal notes' text area.

At the bottom, there is a table with 14 columns: L#, D#, Cargo, Description, Client, LDM, Load date, Unload d, Income, Curr, Expense, Loc.deliv, Profit, POD, Manager. The table contains two rows of data. Below the table, there are fields for 'Special conditions', 'Internal notes', 'Start planning from', 'Date', 'Regions', and 'Trip planner'. At the very bottom, there is a status bar showing 'Saved: 24.08.2022 07:01 NT SERVICE\SQLSERVERAGENT' and buttons for 'Save' and 'Cancel'.

2. Adding cargo orders to the trip

1. To add Cargo - Client order to the trip, press the Add button .
2. Choose to add an **existing** order or create a **new** order.
3. If the order has already been created, select it **from the list of orders** and double-click to add the cargo to the trip.
4. If you need to create a **new order**, follow the instructions [here](#).

If the Customer also uses OZOLS TMS and has sent a Transport order - contract, then the number of this contract is the reference number of the order. **When entering the Customer's name and reference number in the New Order window**, the option to automatically fill in the information of this order will be offered. More about it [here](#).

5. **IMPORTANT** - An **invoice** must be issued for each order. Instructions [here](#).

3. Adding costs to the trip

OZOLS significantly simplifies cost accounting and profitability calculations for companies using their own transport.

Instructions for adding travel expenses [here](#).

